

# Using the Family Feature to Link Client Profiles

Information for healthcare professionals

## Purpose:

Client profiles can be linked in BC Virtual Visit using a “Family” field if they share an email address with their spouse or dependents. The steps below outline how to link or modify linked client’s profiles and cover the privacy considerations required when using this feature.

## Feature Description and Privacy Considerations when Linking Family Members

When multiple members of a family share an email, the patient profiles can now be linked using the “family” field. A few common scenarios where profiles might be linked include, couples who share an email, a dependant adult or a child using their parent/guardian’s email. All linked family members will display in the client’s profile under the **Family** section.



**Important:** When linked as a family, all members share the same email. Editing the email for one of the linked profiles will apply the change to all profiles under this family. Linked family members can still have a unique mobile phone number on their profile.

When adding a family member, you will be presented with the option to use the shared email of the account you are linking to, or adjust the email for all family members.

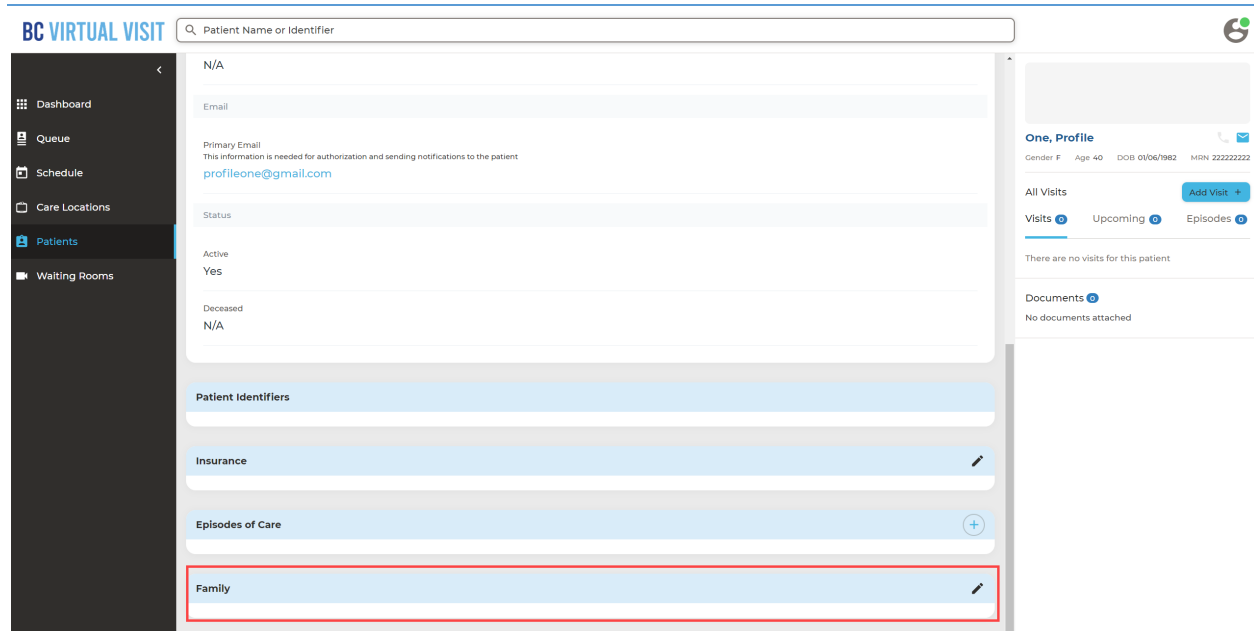
**Privacy Considerations:** Where possible, patients should provide a unique email address to be used for email notifications. It is important to consider privacy when linking emails as all patient invitations for linked family members will go to the same inbox.

For Island Health’s guidance regarding patients using shared email addresses for Proxy and/or Minor’s Profiles, please see the [“BC Virtual Visit: Guidance for use of a shared email”](#) documentation on the BC Virtual Visit Intranet site. Please also remember to verify the patient’s email address each time you book an appointment as this information can change.

## Linking Client Profiles and Creating a Family

Follow the steps below to create a family linkage between profiles in BC Virtual Visit

**Step 1:** Open the client’s profile for which you would like to create a linkage. This could either be a profile with no email attached, or a profile with an existing email. Scroll to the bottom until you see the **Family** section.

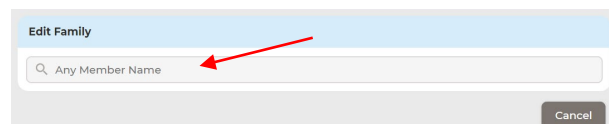


The screenshot shows the 'BC VIRTUAL VISIT' interface. On the left is a sidebar with navigation options: Dashboard, Queue, Schedule, Care Locations, Patients (selected), and Waiting Rooms. The main area displays a patient profile for 'One, Profile'. Fields include Email (profileone@gmail.com), Status (Active/Yes), and Patient Identifiers. At the bottom, the 'Family' section is highlighted with a red box and a pencil icon, indicating it can be edited.

**Step 2:** To edit, click on the pencil icon next to **Family**.



**Step 3:** Use the search field to select an existing profile in which you would like to link to. A new linkage can be formed, or the patient can be added to an existing family if one exists. In this example, Patient Profile One will be linked to another profile "Profile Two". The two profiles will now share the same email.

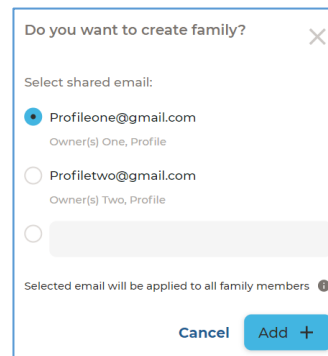


The 'Edit Family' dialog box has a search field with the placeholder text 'Any Member Name'. A red arrow points to this field. There is a 'Cancel' button at the bottom right.

**Step 4:** Select which email you would like to use for the family, or add a new email by entering the email into the field provided.

When linking family members you will have the option to use the existing email on either of the individual profiles or add a new shared email.

To complete the family linkage select **Add+**.

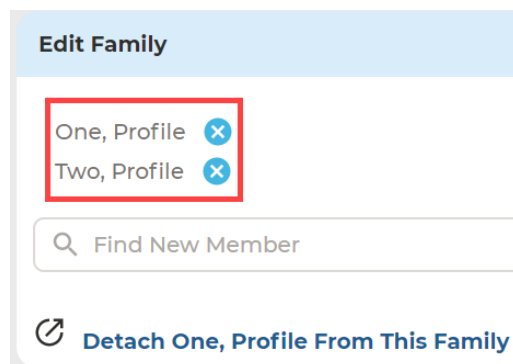


The 'Do you want to create family?' dialog box has a close button (X) in the top right. It contains a section 'Select shared email:' with two radio button options: 'Profileone@gmail.com' (selected) and 'Profiletwo@gmail.com'. Below these is an empty text field for adding a new email. At the bottom, it says 'Selected email will be applied to all family members' and has 'Cancel' and 'Add +' buttons.

**Step 5:** Review the linked family member in the Patients Profile. You will now see the linked family member listed in the patient profile.


[www.islandhealth.ca/bcvirtualvisit](http://www.islandhealth.ca/bcvirtualvisit)

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**Step 6:** If required, an additional profile can be linked to an existing family. Follow the steps outlined above to search the profile you wish to link. If a family linkage has already been created, you will be prompted to add the additional patient. Select **Add+**. Review the linked family members from the patient profile.

Do you want to add Three, Profile to the family? 




 Profileone@gmail.com  
Owner(s) One, Profile , Two, Profile

Cancel

Add +



**Edit Family**

One, Profile   
Two, Profile   
Three, Profile 

## Remove a Client Profile from a Family Linkage

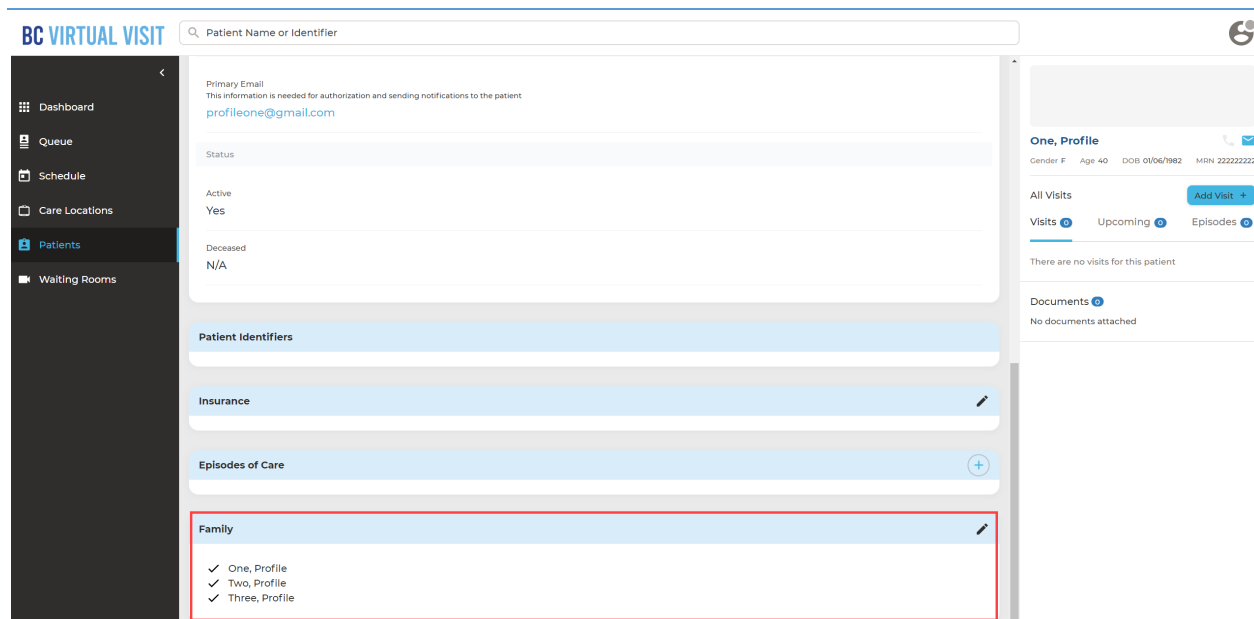
At any point, a patient profile can be unlinked or removed from a family linkage. This will allow the addition of a unique email address to the patient profile.

**Follow the steps below to detach a profile from a family in BC Virtual Visit:**

**Step 1:** Search and Open the patient profile you wish to remove from the linkage or family. Scroll to the family section in the patient profile.

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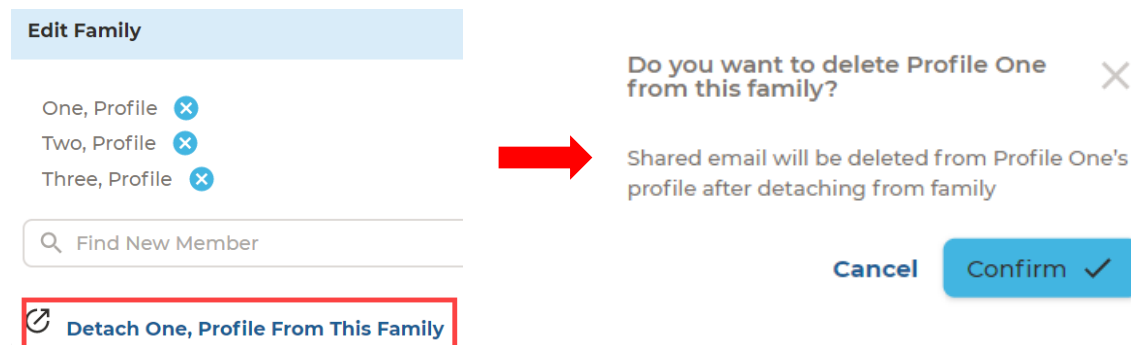
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**Step 2:** Scroll to the Family Section and Select Edit



**Step 3:** Select “Detach” as marked in red below to remove the Patient profile from the family linkage. Select Confirm. The shared email will now be removed from the Patient profile that has been removed. Other members of the family will retain the previously shared email.



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