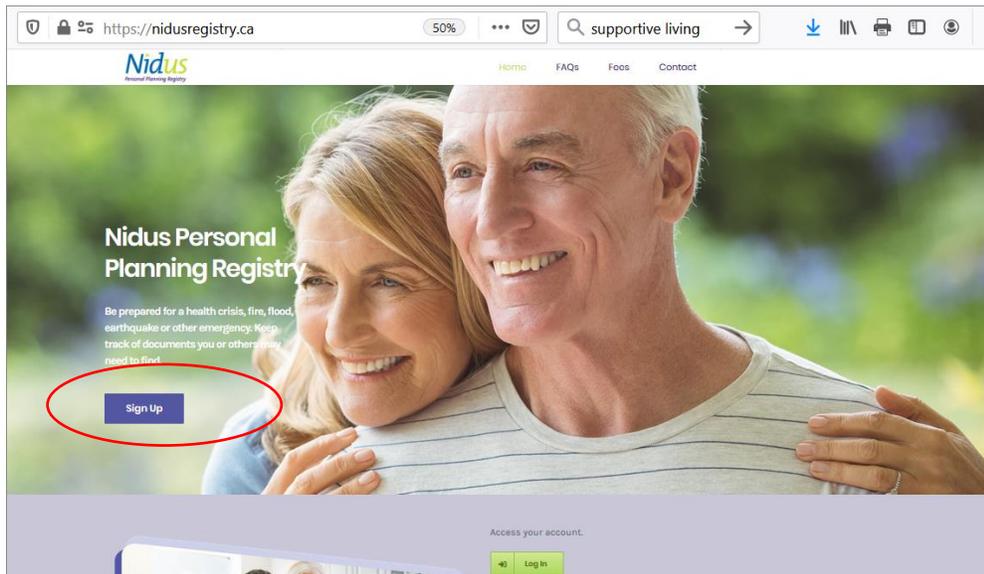


Create a Registry Account

The Personal Planning Registry is a unique type of Registry – it is **self-managed**. It offers you control for updating and granting access to others.

1. Click for the Registry home page – <https://nidusregistry.ca/>



Click Sign Up to Create a Registry Account.

Not sure if you already have a Registry Account?

It is important to have one Registry Account per person. If you are not sure, email us at registry@nidus.ca

WHO CAN REGISTER?

The person who creates an account MUST be **mentally capable of understanding** the nature and effect of making a Registry Account – this means they are capable of giving or refusing consent to the **Terms and Conditions**. This can be:

- **The individual** themselves, if meet conditions listed above.
 - Someone can help the individual use the computer, but the helper must turn away when the individual enters the password. The individual (not the helper) must check the box to agree to the Terms and Conditions.
- A **person who has legal authority to act on behalf** of the individual. Someone can help a person with legal authority to use the computer, but only the person with legal authority can make the password or check the box for the Terms and Conditions.
 - A representative or alternate named in the individual's Representation Agreement.
 - An attorney or alternate named in the individual's Power of Attorney or Enduring Power of Attorney and has authority to act.
 - An individual's court-appointed guardian/committee.
 - An individual's statutory property guardian (the Public Guardian and Trustee).
- A lawyer or notary can register on behalf of their client but must be pre-authorized by Nidus and we will give them a special log in. They can contact us at registry@nidus.ca

2. At step 1 – enter basic information

IMPORTANT

Enter the name of the person whose document is being registered – not the name of a representative or helper. The person being registered is called the Account Holder.

However, the password and email may belong to someone who is acting on behalf of the adult – called the Registrant.

(An Account Holder and Registrant might be the same person.)

WHO GETS TO KNOW THE PASSWORD?

No one must know the password to the Registry Account – only the person who created it (called the Registrant). This is how to keep security and is required by the Terms & Conditions. As we know, it is a good idea to change the password from time to time for online accounts.

HOW DO OTHERS GET ACCESS TO THE REGISTRATIONS?

Others can be granted viewing access. These permissions can be changed.

- **During registration** there are options to permit viewing access to third parties – this avoids having to list specific institutions. Third parties who will have access are pre-authorized by Nidus and monitor. Example of type of third parties:
 - Financial and legal type of institutions.
 - Health and personal care type of institutions.
- **After a document is registered**, viewing access can be granted to specific individuals by 'sharing' the registration – using their email address.
 - You should only share with individuals that you trust and who understand privacy and confidentiality, such as the representative, alternate, monitor.
 - You should only share with a specific and personal email address. A work address is not personal – it belongs to the business or organization. Do not share with a general email address such as 'info@' or 'reception@'

3. At step 2 – enter contact details about the Account Holder

Nidus Personal Planning Registry

Account Information | **Contact Information** | Personal Identifiers | Verify

Step 2 of 4

Contact Information

Address:

Address Line 2:

City:

Province: British Columbia

Country: Canada

Postal Code:

Phone:

Other Phone:

Other Phone:

Address/Phone is for Contact Person:

Back Next

To learn more about personal planning, visit www.nidus.ca

Tips

Enter the Account Holder's **current contact information**. You can update this information later, if there is a move.

Check the box at the bottom of the page if you enter **contact information for someone else**. This will be important information for a third party.

Enter the current physical address for **the individual being registered**. No one is going to write them a letter – the purpose of this is to act as an identifier if there is any doubt or confusion about who the person is.

If the individual moves, you can update this information later.

IMPORTANT

Do NOT check Contact Person unless the individual being registered is homeless.

4. At step 3 – enter information about the Account Holder

Nidus Personal Planning Registry

Account Information | Contact Information | **Personal Identifiers** | Verify

Step 3 of 4

Personal Identifiers

You must provide at least 2 of the following:

Date Of Birth:

Care Card Number:

Drivers License Number:

BC Identification Number:

Social Insurance Number:

Back Next

Tips

Enter the **personal identifiers** for the Account Holder. Use numbers only, no spaces.

These personal identifiers are used by authorized third parties (Access Users) such as hospitals, financial institutions or government agencies to find registrations for a specific Account Holder if you grant permission.

Hospitals and other health related organizations will most often use your Date of Birth and your Care Card Number in a search.

Other types of institutions may use different identifiers in a search.

The **more identifiers you enter**, the more likely an Access User can locate the information they need in order to find your registrations.

Enter the personal identifiers for **the individual being registered**.

Please read the Tips on the right hand side of the page when you are at this step in creating the Registry Account.

5. At step 4 – proofread your entries.

IMPORTANT

Make sure the first and last **name** are for the right individual and are spelled correctly. You cannot change these later. The Registrar can make the change; a fee is charged.

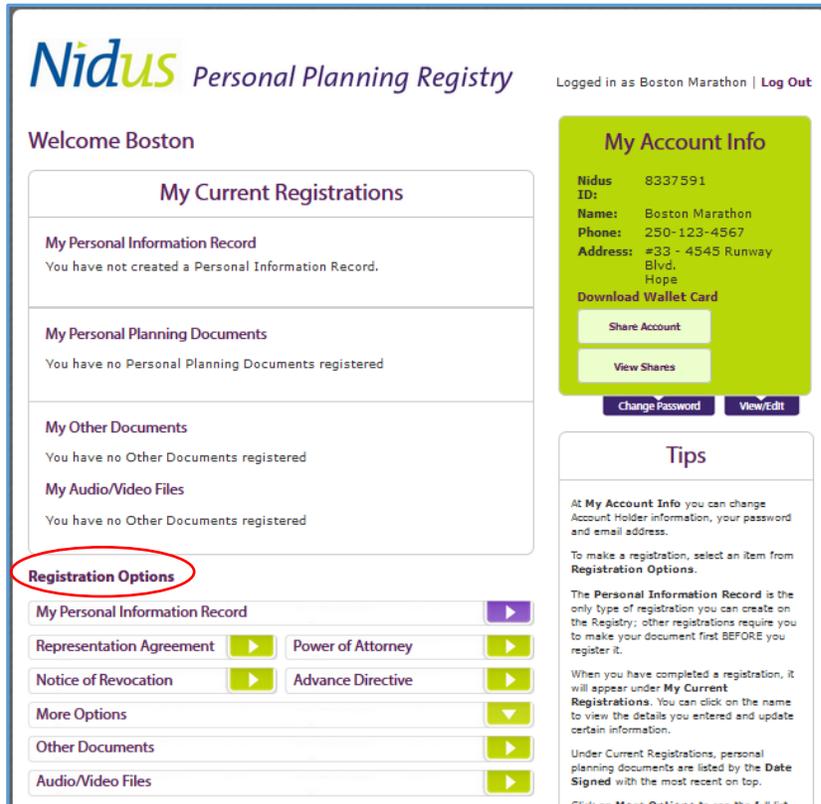
Check the **email address** – it needs to be correct and accessible or you will not receive the Nidus ID and confirmation of registration.

To make changes here, click the 'Edit' link for the section you want to correct.

6. When you have created an Account, you will go to the Welcome/Account page and can register information and documents related to the Account Holder.

Confirmation of the Registry Account is sent to the **email address entered**. It will include the **Nidus ID**. You might have to check your 'Junk' folder.

If you have a **gmail** email address, check your Promotion folder or other folders. Sometimes certain types of emails are automatically put in specific folders.



This page is called the Account Dashboard.
It says 'Welcome [First Name]'
Scroll down to **Registration Options** to click on the type of registration.

Under **Registration Options** – click on the document you want to register, such as Representation Agreement. Have the Agreement beside you so you can enter information such as the date it was signed by the adult with witnesses. You can see by the progress bar at the top of the page that one of the steps asks you to enter the names and contact information for those appointed in the Agreement.

Payment is online:

- By credit card. (If you pay by credit card, you do not have to create a PayPal Account.), OR
- By your PayPal Account.

The fee is \$25.00 for the first registration (this includes creating the Account). It is \$10.00 for additional registrations. These are not annual fees.

NOTE: You can pay by **cheque or e-transfer** but you must arrange this in advance of registration. Email registry@nidus.ca to request to pay by cheque or e-transfer. We will provide details.

When we receive payment, we will email you a coupon code to use for payment. This option takes longer.

To store a copy of the document in the Registry (recommended), you need to get it scanned in PDF format, as one file (not separate pages). Try the public library or a business like Staples.

SCANNING TIPS:

Uploading a copy of the RA to the Nidus Registry is optional but highly recommended.

If you do not have the completed RA scanned, you can still register information. It is a good idea to register as soon as possible. You can upload 'Later' for an existing registration and there is no cost. Email registry@nidus.ca for instructions to upload later.

To upload, you need the completed RA scanned in PDF format as one file, not separate pages. Many home scanners can only do one page at a time. Check the settings on the scanner. If you have individual pages in PDF or JPG format saved to your computer, use this program to combine into a single PDF file – <https://imagetopdf.com/>

There are software programs and mobile phone Apps that can scan. Older phones and operating systems may not work to download app. Here is one suggestion of an App for an iPhone:

Genius Scan (<https://apps.apple.com/us/app/genius-scan-pdf-scanner/id377672876>). You still have to take a photo of one page at a time, but it is easy to save as one PDF. And then email it to yourself and upload it from your computer.

You can upload 'Later' – at no extra cost by following our how-to-instructions. Click this link for directions or copy into your Internet Browser address bar http://www.nidus.ca/PDFs/NidusRegistry_Upload_forExisting.pdf

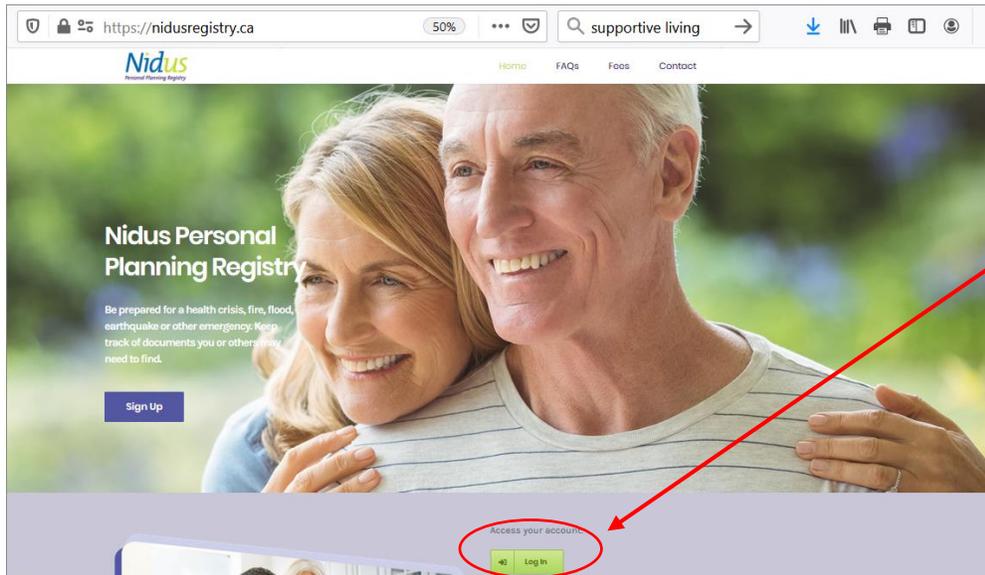
- 7. After registering, print wallet cards. Put a wallet card in every purse, wallet, jacket, glove compartment, suitcase, and give one to neighbours. It helps speed up communication.



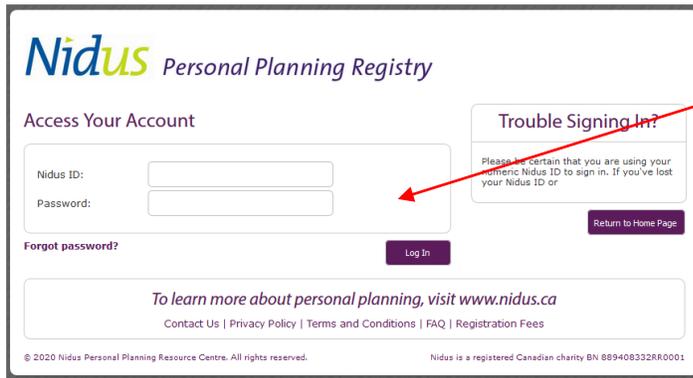
AFTER you register something, you can download/print wallet cards. There are two on a page to cut out. The front of the wallet card will have the Nidus ID. Do NOT put the private password on the wallet card. On the back you can print the name and phone number of the representative and alternate. Do this before laminating the card.

When finished, click Log Out – top right corner of the web page.

8. To sign back into the Registry Account – <https://nidusregistry.ca/> - click Log In



Scroll down to see and click the Log In button.



Enter Nidus ID (it was sent with confirmation email – 7 numbers, no spaces or dash)
Enter the password. Click Log In.

If you do not remember the password, click **Forgot Password** and enter the Nidus ID then click to **'Reset Password.'** You will receive an email with a link (check Junk folder in case). You have 24 hours to re-set the password, then the link expires – this is a security measure. Start over if the link has expired.