

INSTRUCTIONS FOR COMPLETING THE RA7F+L

TIPS for handling paperwork, signing & procedures during the Covid-19 pandemic.

Covid-19 is a new virus and there is much to learn, including how long the virus germs might remain infectious on a surface. Some research suggests the germs last longer on a hard surface, like plastic, than on paper. Some studies say the germs may be infectious for up to 24 hours on cardboard. No one knows for sure and therefore we want to be cautious to prevent the spread of virus germs. Some people who get infected by the virus experience very serious and even life-threatening illness.

General recommendations:

- The goal is to limit the number of times paperwork is handled by the same people.
- Whoever handles the computer (keyboard and mouse), printer, and the printed forms/instructions needs to be sure their **hands are washed** and disinfected. The more often the better and for sure if you are touching other surfaces (including your face).
- Think about using **disposable tissues** to handle pages of the Agreement. When finished, dispose of the tissues (for each page) – do not use them for another purpose.
- While the law has rules about signing and witnessing, the law does not forbid what is called signing in ‘counterpart.’ This means you can print more than one copy of signing pages (like the page where the adult and witnesses sign). Different people can sign separate copies of the same page. This can reduce contamination.
- ONLY the adult (person the Representation Agreement belongs to) and the two witnesses have to be able to watch each other sign. Find a large room so they can watch **from a distance** (2 metres/6.5 feet/two arms-length) or witnesses can watch the adult through a window from outside or from another room.
- If you are able, type information in the fillable fields. This will mean less handling of the paperwork. See next heading below.
- Each person should sign with their own pen/writing instrument.
- Get the completed RA form scanned in PDF format to upload and store a copy in the Nidus Registry. More about *Where to Register* on page 6. BC’s Electronic Transactions Act says an electronic copy can be recognized – where there is reliable assurance as to the integrity of the electronic copy and it is accessible and can be retained by the other party, even if a law requires an original. The Nidus Registry lets you meet these conditions.
- Put the original of the Agreement in a page protector or large envelope and leave for a few days. It seems the passage of time can kill the virus germs.

Who makes an RA7F+L?

Nidus provides the RA7F+L for adults who find it sufficient for their financial and legal affairs instead of an Enduring Power of Attorney. The adult is capable to understand the difference in what is covered by the RA7F+L versus the Enduring PoA.

If you are supporting an adult who needs help with finances because their capability to ‘understand’ is in question, please go to www.nidus.ca

- Click on the first photo/heading if helping a ‘special needs’ adult whose mental capability to understand was affected at birth or in childhood. Scroll down to Basic RA7All and Instructions.
- Click on the third photo if helping an adult whose mental capability to understand was affected in adulthood due to an illness (e.g. advanced dementia) or injury (serious stroke). Scroll down.

Is the RA7F+L form fillable?

Yes. The Basic RA7 form by Nidus has fillable fields – you can type in names and contact information. The fields are programmed to help avoid mistakes. After typing in the form and before printing, save it under a different name to keep the information entered. Some fields, like signatures and dates, are completed by hand (after printing).

You do not have to type. You can handwrite information. Do NOT use pencil. Print clearly.

TIP:

Make sure you enter ALL information including personal addresses with city and code. Do this on the RA form and in the Nidus Registry for the adult and the appointees. Only use c/o for the adult’s address if the adult is homeless. No one is going to use the address to write the adult a letter. In legal terms, addresses serve as a type of identification and it is important to use the adult’s address. If the adult or an appointee moves, addresses can be updated in the Nidus Registry. Do NOT make changes on your original RA form. See more about changes at the end.

Are the Certificates part of the legal RA7F+L?

Yes. Make sure the Certificates are completed. The Certificates go at the end of the Agreement.

Does the order of the pages matter?

Nidus puts page numbers at the bottom right of the Agreement and provides the required Certificates after the Agreement. Pay attention to the order of the pages and keep the same order.

What if I only have one person to name? Can I still use the Basic RA7F+L form?

No, you cannot use the RA7F+L for one person. For the RA7F+L you need at least two people. For the Basic RA7 F+L you need one individual to be the representative and a different individual to be the monitor.

The **only exception** to the requirement to name someone in the **monitor** role for the Basic RA7F+L, is if the representative is the adult’s spouse and the spouse is the only person named in the RA7F+L (that is, there is no alternate).

If at least two people want to act together for finances instead of naming a monitor - complete a [Custom RA7F+L request](#).

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Do NOT leave BLANK fields in the RA form as it can create concerns. If you are not naming an alternate, you can neatly cross out references to the alternate on page 2 (#5,6,7) and where they sign on page 4 and put a line through their Certificate of Representative/Alternate (Form 1).

Who is the adult in the RA7F+L?

The term adult refers to the individual the Representation Agreement belongs to.

Does the adult sign? What if they can't?

It is very important that the adult sign their Representation Agreement on their own.

A signature is the mark they make in front of the two witnesses. It does not matter if it is a dot, line or squiggle. What matters is that they do it on their own. Practice if necessary.

Adults with physical disabilities may have to hold a pen or other writing instrument in their mouth or toes. You can also put the signing page on a clipboard and 'catch' the signature. Some people can't use a desk. Sometimes you might have to build up the pen to make it easier to grasp (or buy a thick felt pen). Get creative.

A thumbprint or stamp is NOT a signature for a Representation Agreement.

What age can my representative or alternate be?

The Representation Agreement Act (RA Act) requires that the adult, representative, alternate, and the witnesses must all be 19 years of age or older at the time the Agreement is made. (Nineteen is the age of adulthood in British Columbia.)

Who can be a representative or alternate?

The RA Act has some restrictions on who can be named as a representative or alternate representative when making the Agreement.

To avoid conflict of interest – you can NOT name someone as a representative or alternate if they are:

- Paid or receive some other benefit for providing health care or personal care services to you (the adult)—unless they are your (the adult's) spouse, parent or child.
- An employee of a facility where you (the adult) live and receive health or personal care services—unless they are your (the adult's) spouse, parent or child.

An individual who is named as a monitor is not subject to the above restrictions.

Anyone named as a representative, alternate or monitor must be 19 years of age or older and must be willing to carry out their duties. Nidus has a fact sheet on roles at www.nidus.ca – Information (top menu bar) > Representation Agreement

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Does the representative have to live locally?

No. The RA Act does not restrict by geography. However, there can be practical issues, especially related to communication. If something happens to the adult, how does the representative and/or alternate find out? This is how printing wallet cards from the Nidus Registry can help. Communication is the heart of the Nidus Registry service.

Who can be a witness?

You need **two witnesses**. They might be a couple. They might be spouses – legally married or in a common-law relationship – or roommates. They can be staff who support the adult.

Witnesses have to meet qualifications. Consider if each of the individual's you are considering meet the following list of qualifications.

Witness qualifications – each witness must:

- Be 19 years of age or older, and;
- Understand the type of communication used by you (the adult); and
- NOT be a representative or alternate representative named in the Agreement; and
- NOT be the spouse (legally married or in a marriage-like relationship [common-law]) of a representative or alternate named in the Agreement or the child or parent (by birth or adoption) of a representative or alternate named in the Agreement, and;
- NOT be the employee of a representative or alternate named in the Agreement;
- NOT be the agent (someone who can act on behalf) of a representative or alternate representative who is named in the Agreement.

Do NOT take the RA7F+L form by Nidus to a lawyer or notary public to review or for witnessing. Legal professionals do not generally witness documents they did not draft. The RA7 form by Nidus does not include wording for a lawyer or notary public to be a single witness.

If you follow the instructions, the RA7 will be valid. Representation Agreement forms by Nidus follow the requirements in the law. Members of Nidus were involved in creating the law about Representation Agreements. If you have difficulties ask a relative or friend to help. Nidus materials are designed for self-help and mutual help.

Does everyone have to be together at the same time for signing?

No. Only the adult and the two witnesses have to be together at the same time – they have to watch each other sign. They can do this from a distance. Only the adult's signature is witnessed. The adult's signature can NOT be witnessed by video, Skype or online meeting like zoom.

The adult must be the first one to sign. The witnesses sign in the space below the adult's signature.

During Covid-19 and physical distancing measures, you can have the adult and witnesses sign separate copies of the same page and watch each other sign from a distance. Each person should also use their own pen/signing instrument. See the box on page 1 for general recommendations.

Make sure the name of the adult and witnesses are printed or typed on EACH page as the legal wording refers to the person. For example, one copy of the signing page can have the adult's signature/mark. A separate copy of the same page can have the signature of Witness 1. Another copy has the signature of Witness 2.

Find the Certificate of Witness – one for each witness. Use a disposable tissue to more safely handle the paperwork. Witnesses should use their own pen to fill out their own Certificate.

The representative and alternate can **NOT** sign anything in advance of the adult and witnesses.

The representative and alternate do not need witnesses AND they do not have to sign at the same time as the adult or as each other. **You can implement physical distancing by having the representative and alternate sign in 'counterpart.'** For example, you can make two copies of the page where the representative and the alternate sign – give one copy to the representative for their signature and one copy to the alternate. Don't forget that the representative and the alternate also have to complete and sign a Certificate of Representative/Alternate – there is one Certificate for each of them.

A monitor does not sign on the RA7F+L. They must complete a Certificate of Monitor.

What if a representative and/or alternate lives out-of-town?

Read signing instructions for the representative/alternate on the Basic RA7F+L form. You need their original signature on the page but they can sign on a photocopy of the page. For example, a completed Basic RA7F+L might have two of the same pages.

A monitor does not sign on the RA7F+L. If a monitor lives out-of-town, send the Certificate of Monitor. They must return it with their original signature so you have a complete original of all pages. Then you can make copies.

What about dates of signing?

Print dates clearly. It is a good idea to use the name of the month, not numbers. For example, September 12, 2019 not 09/12/19.

The date the adult signed in front of witnesses must be filled in three places on the RA form:

- Beside the adult's signature on page 3.
- Top of page 1.
- Top of page 4.
- Also put the date on top of each of the Certificates.

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Where do I write wishes?

The Representation Agreements forms by Nidus do not provide space for listing wishes as we know from years of experience (and legal experts agree) this can backfire.

If anything is written down, make sure the representative, alternate and monitor have it and you discuss it with them. You never know what will happen in the future and decisions need to be made based on current circumstances in keeping with your wishes and values.

It is important to have ongoing discussions.

Where can I register the RA7F+L?

You can register information about the completed RA7F+L and access it later with the Nidus Registry. You can also store a copy (see step 2 below). Often the registration is done by a representative or alternate. The Agreement gives them legal authority to act on behalf of the adult (do registration).

Go to <https://nidusregistry.ca/>

1. Click the Sign Up button to create a **Registry Account** in the name of the adult, not the representative. If you already made and registered an RA9, Log In and follow steps.
2. At the Account/Welcome page, scroll down to **Registration Options** and select Representation Agreement to register the completed RA7F+L.
3. You can upload a completed copy of the RA at the Browse button (make sure you have all pages and original signatures). To upload, you must get the completed RA7 scanned in PDF format (see below for scanning tips). You can choose 'Later' and just register information. There is no cost to upload Later; contact registry@nidus.ca for instructions.
4. The Registry sends a confirmation email to the email address you entered during Sign Up. The confirmation email includes the Nidus ID, which is 7 numbers.
5. After registering, print a wallet card (see green container to right at Welcome page). The wallet card will have the Nidus ID and the Account Holder (adult's) name.
6. To check on registrations and to update information you typed in, such as a representative's new phone number, access the Nidus Registry at <https://nidusregistry.ca/> scroll down and click the Log In button.

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:

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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.

Public libraries and businesses like Staples can help with scanning. During Covid-19, you need to check if open. You can also ask relatives and friends.

PRINT WALLET CARDS

From the Nidus Registry, you can print personalized wallet cards at no cost. See the green container to the right at the Welcome page of the Nidus Registry (after you create a Registry Account and register the completed RA).

There are two wallet cards on each page you download to print. The wallet card is meant to be folded and then you can laminate it. On the front is the Nidus ID and the adult's first and last name. On the back of each wallet card, you can write the name and phone number of the representative and alternate (before you laminate the card).

Make a wallet card for each wallet, purse, glove compartment, suitcase, and jacket -- and give one to your neighbours. If your neighbours know you went to hospital, they can phone your representative or alternate. It's easy, it's practical, and it's in your control.

The idea of the Nidus Registry came out of the grass-roots law reform that created the RA Act. Citizens and community groups in BC (and numerous professionals) supported the idea of a Registry – especially for time-sensitive matters like health care when the RA7 needs to be readily available.

The Nidus Registry is different from many government registries because it is self-managed. You can register important information yourself and keep it up-to-date. The Registry is designed to help with organization and communication.

The Nidus Registry has helped to honour people's wishes at times they are most vulnerable.

The public is using the Nidus Registry as part of emergency preparedness. You can securely store important information and documents (like insurance policies) in case of a wildfire, flood or earthquake – use the section called 'Other Documents.'

Who gets copies of the completed RA7F+L?

Make sure those named in the RA7 each have a copy (not necessary for the witnesses). You can 'share' the registered Agreement with them from the Nidus Registry. This avoids extra handling of paperwork.

You may not know all the places that will need copies when you first make the RA7F+L. An RA7F+L only covers financial and legal affairs. It can be helpful if you get this document on file – with CRA, your financial institution, your financial planner/advisor – before your representative/alternate has to use it.

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Take the original to your financial institution and they can make a true copy of the original for their files. Never leave the original with any third party – count to check you have all the pages returned.

It may be new to some staff – but that is good, you are helping with education!

Distributing copies during Covid-19

Ask the institution or professional if they have applied for authorization to access the Nidus Registry. There is no cost for hospitals, care facilities, financial institutions, government agencies to be authorized as an Access User with the Nidus Registry.

The BC Electronic Transactions Act recognizes electronic copies of documents such as the RA7. When you register be sure to check the box to Permit Access to third parties (and to Permit Access to the uploaded copy).

You can ‘share’ a registration with your family doctor and a trusted individuals. This avoids handling of paper. They have ‘viewing’ access. They can save or print the information and uploaded copy of the RA7. To not use a generic email address to share – like ‘info@’ or ‘reception@’ – get a direct email with a name. It is safer.

You may run into a lack of awareness but since Covid-19 and orders to stay at home and to work remotely and to use virtual means of connecting, it is time for institutions and government agencies to get on board!

Where should I keep the original?

You **MUST** keep the original safe and accessible. **It is proof** of authority for the representative and alternate.

When you register the completed RA, you can say where the original is kept. Use the ‘details’ box to be very specific – such as third drawer of file cabinet. If you move, make sure to update this in the Nidus Registry. It can be a big help to others!

- Some people give the original RA to their representative.
- Most people keep the RA in their home, with other important papers. It is NOT a good idea to put it in a safety deposit box.
- Some people store it in the freezer – but be absolutely sure it is protected from moisture.

We recommend using the Nidus Registry to store (upload) a copy of the completed RA in case you lose the original or there is no time to get it (or you are evacuated).

TIP:

Keep the original in a page protector (available at stationary store) or large envelope. This keeps it clean and a good reminder that it is your original. Do not staple the original as you may need to make photocopies. If there is a change of address or phone, keep details in the place. See more details under next heading. Do NOT make any changes on the original as it can raise suspicions.

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What about changes?

Do NOT make any changes on the original as it can raise suspicions.

A change of address, phone number or even legal name change does not make an Agreement invalid. These changes do not require making a new Agreement. Make these kinds of changes on future photocopies of the original.

If you have distributed some copies, let those parties know about any change of address or phone.

You can update contact information in the Nidus Registry so it is always current. An uploaded copy of the completed Agreement should match your original.

If there is a need to **change the people** named in your Agreement, you (the adult) will revoke (cancel) a Representation Agreement and make a new one. Making a new Agreement does not automatically cancel the previous one. Nidus has information and a form for revoking under Information (top menu bar) > Representation Agreement.