Nidus Personal Planning Resource Centre and Registry

Representation Agreement Section 7

To support self-determination for ALL adults.

STEP FIVE
WHAT TO DO WITH COMPLETED RA7?

This information is based on the legislation in the province of British Columbia.

The following is provided as information.

Nidus does not give legal advice.

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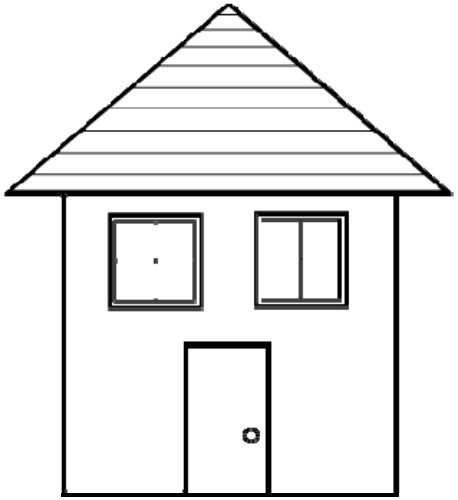
Filing Your RA7

- KEEP THE ORIGINAL safe but accessible – usually in your home.
- Store information and a copy in the REGISTRY.



Personal Planning Registry
operated by Nidus

Store a COPY

Keep the ORIGINAL

Safekeeping the Original

Do NOT lose your original. Any third party can ask to see it.

- You will need to take the original to the financial institution the first time you want to use it there. More tips on this later.
- A safety deposit box is not very accessible for keeping an RA7. Most people keep it at home.
  - When you register a copy of the Agreement, you can include information on the location of the original. You can update this information if you move.

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Register the RA7

The Personal Planning Registry is online.

- The fee to register is $25.00 for one Basic RA7 form. Additional forms are $10.00 each. If you ordered a Custom form, registration was pre-paid.
- You can store a copy of the RA7 – get it scanned in PDF format. It must be scanned as one file, not individual pages.
- Go to www.nidus.ca/registry - see link to online Registry in right sidebar. **Read tips on next slide.**

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Register the RA7

It is important to only have ONE Registry account.

- Did the adult make and register an RA before July 2014? We transferred registrations from the old system to the new online system. Read the information at www.nidus.ca/registry
- You can add registrations to the existing account.
- If the adult made an account in the new online system after July 2014, use the Nidus ID and password to sign-in to the account and register the RA7.

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Register the RA7

If you are Creating a Registry Account for the first time:

- Make sure the account is in the adult's name – not the name of the representative.
- Enter the adult's contact information – not yours. List where the adult lives; this is part of their identification.
- After you set-up the account, you can register the RA7 – look for Registration Options – click on Representation Agreement.

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Register the RA7

If you do not have a scanned copy of the RA7 in PDF format – you can upload it later.

- Payment is made online through PayPal. You do not need a PayPal account, you can use your credit card.
- You may arrange to pay by cheque instead. You need to contact registry@nidus.ca BEFORE you start registering the RA7.

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Register the RA7

At the adult's account page:

- Click on the link to print a wallet card (see green container to the right).
- When you are finished, be sure to Log Out – top right corner of page – it is part of the security procedures.

Read Registry fact sheets at www.nidus.ca/registry - in the right sidebar.

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Making Copies

Who gets copies of the document(s)?

- Give copies of the completed document(s) to each person appointed.
- The Registry does not replace distributing copies to known parties. The RA7 is proof of authority – provide a complete copy including Certificates.
- For an RA7 that includes health care, give a copy to the doctor and any specialists or other care providers involved.
- Give a copy to any service providing agency, group home staff, home share provider.

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Introducing the RA7 at the bank

If the RA7 includes routine finances, you need to take the **original** to the financial institution the first time.

- Make sure your paperwork is in order and the RA7 is validly made.
- Do not go to the teller, meet with a financial services manager.
- It is a good idea to take a copy of the Definition of Routine Management of Financial Affairs.
  - Be prepared that the Branch may not be familiar with the RA7.

Please read the "Definition of Routine Management of Financial Affairs"
www.nidus.ca > Information > Representation Agreement > Resources

Introducing the RA7 at the bank

Meeting with the financial institution:

- It is a good idea for the representative to take the adult if possible, and/or the monitor.
  - You want to assure the financial institution that you are *assisting* the adult. Do not talk about how incapable the adult is – this is confusing to the bank as they will not understand how the adult is capable of making the RA7.

Introducing the RA7 at the bank

What to expect at the meeting:

- The manager will make a copy of the original RA7 and mark it 'true copy of the original.'
  - They will return the original to you.
- Some institutions might send their copy to the legal department to review.
  - This is not a concern, it is because the local staff are not trained.
- If the RA7 is rejected, ask for the reason, preferably in writing.
  - You may need to contact someone higher up in the institution to resolve the issue.

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Using the RA7 with CRA or Services Canada

Many federal institutions have never heard of the RA7, which is based on a BC law.

- It is probably best to deal with these institutions by regular mail.
  - It may take longer, but you can send a complete copy of the RA7 to be put on file for the future.
- If you continue to have problems, contact your MP (federal) and your MLA (provincial) elected officials.
  - It is also a good idea to have a copy of the Definition of Routine Management of Financial Affairs.

FAQ

The Ministry for Social Development asked for a copy of the RA7, do I have to give it to them?

- Yes. The RA7 is proof of your authority. You want to provide a copy so the Ministry can talk to you.
  - Be sure to send the Certificates as well as the RA7 form. Make sure your paperwork is in neat order.

FAQ

What if there is a change of address or phone number, do we make it on the RA7 forms?

- Do **NOT** alter the original.
  - When you make copies, you can neatly make changes on the copy.
  - You can update contact information in the Registry. Sign-in to the Registry account with the Nidus ID and password.
    - Under 'My Personal Planning Documents,' click on the Representation Agreement, then click on Edit Information and make the changes. Be sure to save them.

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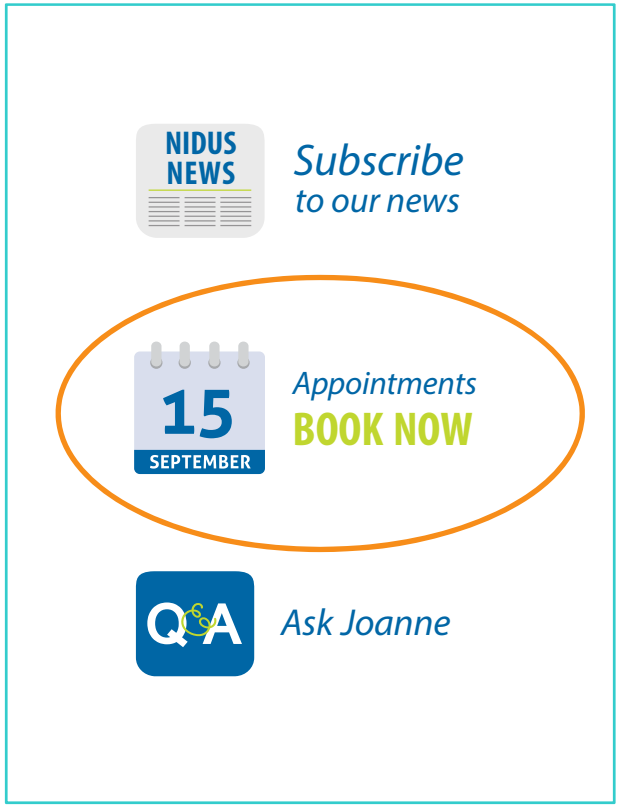
Need more help? Have questions?

- Nidus provides personal help by appointment.
- Appointments are about 25 minutes.
- The fee is $25 or sliding scale for low income (non-refundable).
- Book online at www.nidus.ca
  click on BOOK NOW in the right sidebar.



NOTE: Nidus is not able to accept drop-ins and we do not have phone reception services. We do not receive funding for the community living sector; for help make an appointment.

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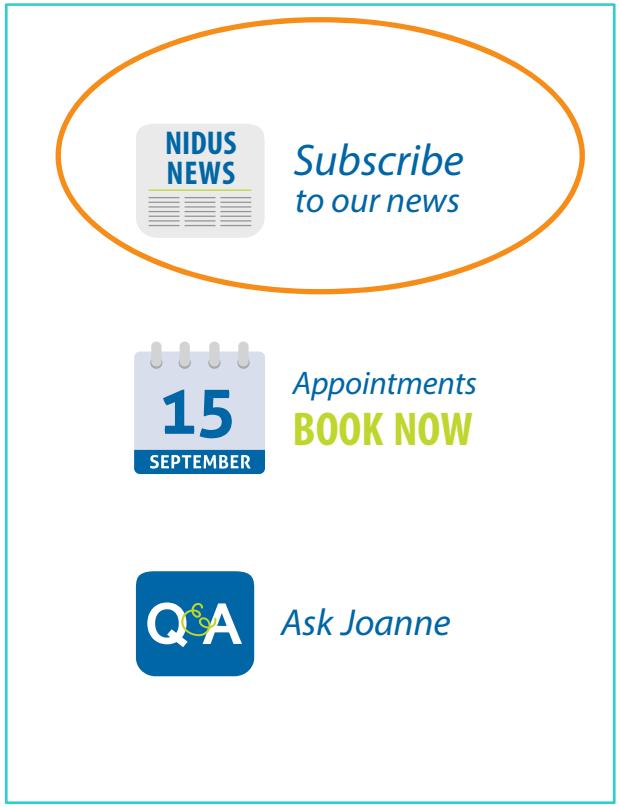
Stay Informed

- Sign up for the Nidus newsletter.
- Read the Ask Joanne posts for answers to specific questions.
- Check back with the website – right sidebar 'What's New.'



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This information is provided in part through a contract with Community Living BC in 2013-2014.

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