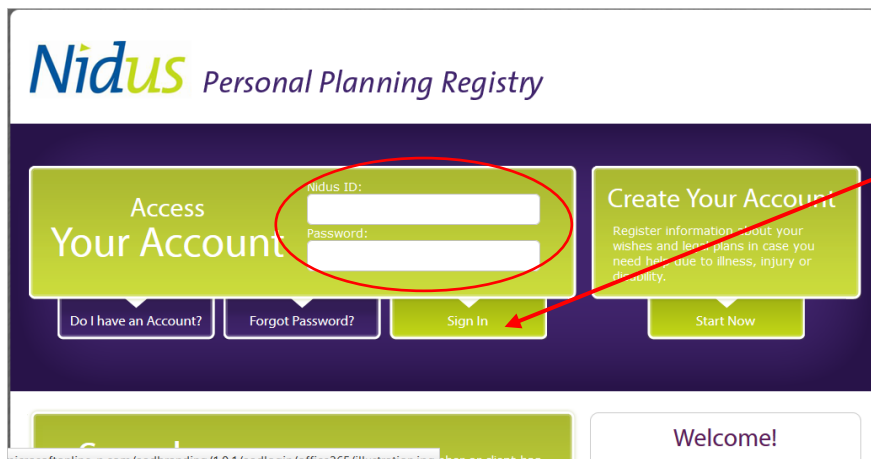


## How to Access Account and Register

The Personal Planning Registry is a unique type of Registry – it is **self-managed**. It offers you control for searching, updating and granting access that other registries do not provide, especially those run by or for government or health systems.

1. Click for the Registry home page – <https://registry.nidus.ca/>  
(You can also go to [www.nidus.ca/registry](http://www.nidus.ca/registry) – click Online Registry in the right sidebar.)



Enter the Nidus ID and the password you created. Click Sign In.

If you do not remember the password, click Forgot Password and you will receive an email with a link to make a new password. **This is why you need to keep the password current!**

2. This is your Account Holder main page.



Make sure you Log-Out when you are finished. It protects your security.

This green container is the Account Holder's information.

Click **View/Edit** and enter or correct the contact information for the Account Holder. **See next page.**

After you register, click Download Wallet Card. You can print as many cards as you need. It will show the Account Holder's name & Nidus ID. Do NOT write the password on it. You have to keep the password private.

### 3. Register document – see Registration Options

This page is called the Account Dashboard.

It says 'Welcome [First Name]'

Scroll down to **Registration Options** to click on the type of registration.

**NOTE:** A Personal Information Record is a type of registration you can do online. It is for listing contact information to help a representative or attorney who has to act for you in a crisis. For example, what banks do you deal with? who is your doctor and pharmacist? what is on your 'emergency to do list?' Do you have pets that need looking after? You can 'share' the Personal Information Record with your representative.

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
- 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** but you must arrange this in advance of registration. Email [registry@nidus.ca](mailto:registry@nidus.ca) to request to pay by cheque. We need to gather some information and will tell you how much and where to mail the cheque. When we receive it, we will email you a coupon code. 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. You can upload 'later' – at no extra cost. Click this link for directions or copy into your Internet Browser address bar

[http://www.nidus.ca/PDFs/Nidus\\_Registry\\_Upload\\_for\\_ExistingDoc.pdf](http://www.nidus.ca/PDFs/Nidus_Registry_Upload_for_ExistingDoc.pdf)

## 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@'

## 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.

## WHO CAN REGISTER AND PROVIDE A PASSWORD?

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.
  - Someone can help the individual use the computer, but the helper must turn away when the individual enters the password. The individual checks 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 listed below to use the computer, but only the person below 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 as a Registration Agent and must NOT register clients at Create Your Account.

4. Check on your registration – click on the name of document.

The screenshot displays the user's account page. At the top right, it says 'Logged in Boston Marthon' with a 'Log Out' link circled in red. Below this is the 'My Account Info' section with fields for Nidus ID, Name, Phone, and Address, and buttons for 'Change Password' and 'View/Edit'. The main content area is divided into three sections: 'My Current Registrations' (with a note that no Personal Information Record has been created), 'My Personal Planning Documents' (containing a table with one entry: 'Representation Agreement' with document # 7363654-1, signed 02/02/12, and last reviewed 11/20/14), and 'My Other Documents' (noting no other documents are registered). Below these is the 'Registration Options' section with buttons for 'My Personal Information Record', 'Representation Agreement', 'Power of Attorney', 'Notice of Revocation', 'Advance Directive', 'More Options', and 'Other Documents'. A 'Tips' section on the right provides instructions on how to use the account and registration features. A red circle highlights the 'Representation Agreement' document title in the table, and a red arrow points from it to the 'Tips' section.

Make sure you Log-Out when you are finished. It protects your security.

The registered document(s) is listed under 'My Personal Planning Documents.'

**Click on this title** – it is a link and will show you the information that was entered. You can click 'Edit' to update contact information for those appointed and change permissions for access and upload a copy in PDF format if you chose 'later' when you registered.