

Uploading a Document – for Existing Personal Planning Registration.

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. Log into your Account, using your Nidus ID and the password you created.

2. At the Account/Welcome page – look for the name of your document under ‘My Current Registrations’ and ‘Personal Planning Documents.’

Welcome Sylvia

My Current Registrations

My Personal Information Record

	Last Reviewed (m/d/y)
View My Record	11/02/14
Print My Record	

My Personal Planning Documents

	Document #	Date Signed (m/d/y)	Last Reviewed (m/d/y)
Representation Agreement	2942048-1	05/30/14	11/03/14

My Other Documents

	Date Created (m/d/y)	Last Reviewed (m/d/y)

In order to store a copy of your document in the Registry, you need to get it scanned in **PDF format** – as one file, not separate pages. You may have it saved on your computer or a USB stick.

Click on the title of your registered document.

3. See container for Document Location & Access

Document Location & Access		Edit Information
Location of Original Document:	Sylvia Star	
Address 1:	555 Constellation Ave.	
City:	Milky Way	
Province:	British Columbia	
Country:	Canada	
Postal Code:	V1V 1V1	
Phone:	555-666-7777	
More Details:	third drawer of china cabinet	
Uploaded File:	No file	←
Allow Financial & Legal:	No	
Allow Health & Personal:	Yes	
Permit allowed to access copy:	No	

Beside Uploaded File it says 'No File.'

Click Edit Information

Document Location & Access	
Location of Original Document:	<input type="text" value="Sylvia Star"/>
Location Address 1:	<input type="text" value="555 Constellation Ave."/>
Location Address 2:	<input type="text"/>
Location City:	<input type="text" value="Milky Way"/>
Location Province:	<input type="text" value="British Columbia"/>
Location Country:	<input type="text" value="Canada"/>
Location Postal Code:	<input type="text" value="V1V 1V1"/>
Location Phone:	<input type="text" value="555-666-7777"/>
More Details:	<input type="text" value="third drawer of china cabinet"/>
Permit Access:	<input type="checkbox"/> Allow Financial & Legal Institutions
Permit Access:	<input checked="" type="checkbox"/> Allow Health & Personal Institutions
Register Copy - Upload PDF File (optional):	<input type="button" value="Browse..."/> No file selected.
	<input type="checkbox"/> Permit Allowed Institutions to Access Copy?
<input type="button" value="Save Changes"/> <input type="button" value="Cancel"/>	

Click on Browse and find the PDF document on your computer/USB stick and click/open it.
Make sure you select the correct document.
When the file name appears beside Browse button, click 'Save Changes.'

4. Click Return to the Account and you can click on the link again and see that beside 'Uploaded File' it will say **View Document** (it's a link to view your PDF).