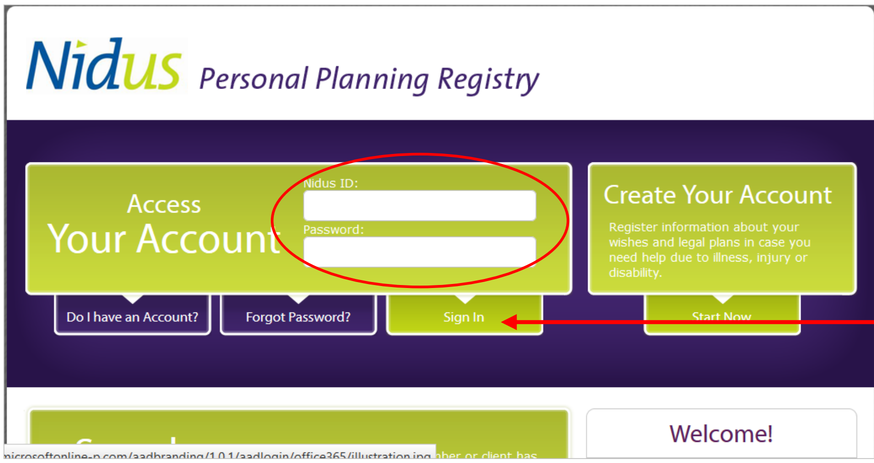
Access & View Account – Edit & Share Registration

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.

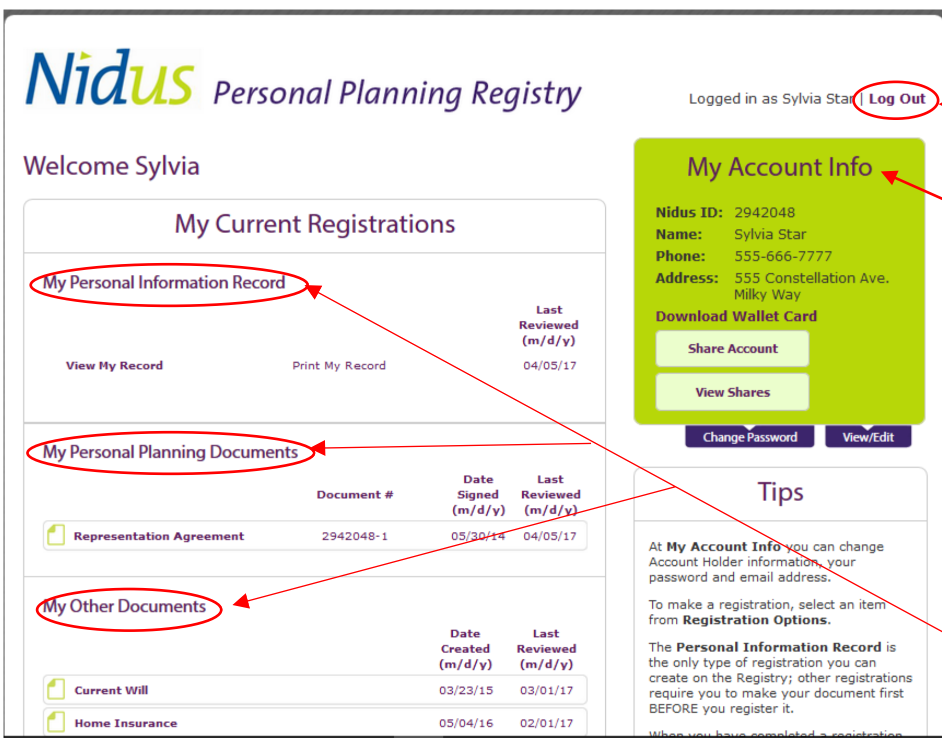
1. This is the Registry home page. (Go to www.nidus.ca/registry - click Online Registry in the right sidebar.)



Enter the Nidus ID and the password you created.

Click Sign In.

2. This is a screen shot of the Account Holder dashboard – Welcome page. This example is for an adult who made their own registrations.



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

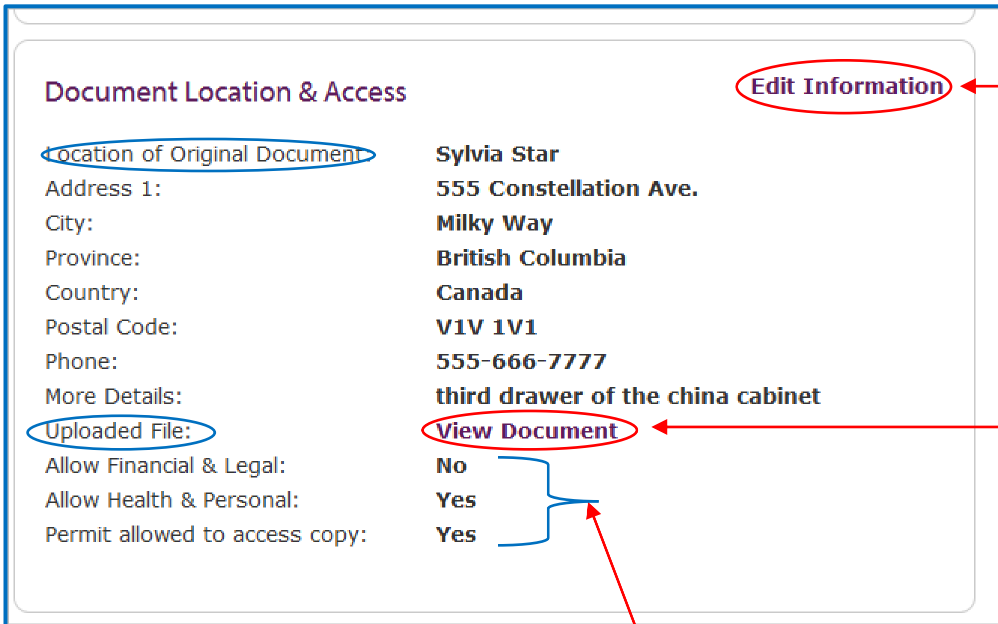
This is information about the Account Holder (Sylvia). If you click View/Edit at bottom of green container, you can edit address, email, identifiers and other options.

There are different types of registrations. My Personal Information Record can be made and fully edited online.

If there are documents listed under the heading – they are links – click on them.

Click on title/link under My Personal Planning Documents – see next page.

3. Example of Edit after click on Representation Agreement link.



Click Edit Information if you want to edit information about where the original is located or other details.

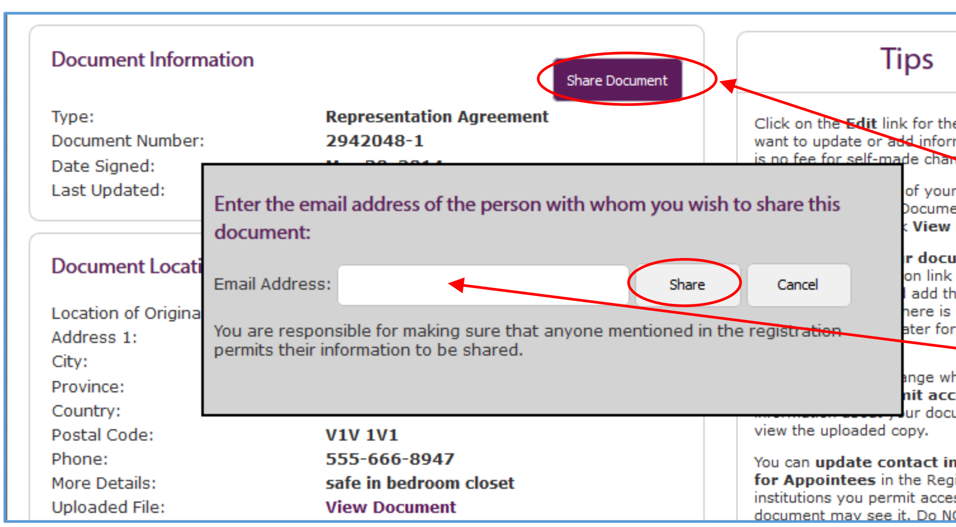
If you **uploaded a copy** of the document at the time of registration, click 'View Document' to see it, save it or to print it.

You can also edit the permissions you granted to authorized third parties to view your information and document.

Recommended:

- RA7 All – check Yes for all three.
- RA7 H+P – check No for Financial & Legal. Yes to others.
- RA7 F+L – check Yes for all three.
- RA9 – check No for Financial & Legal. Yes to others.

4. Example of 'Sharing Registration' – when click on link for registration.

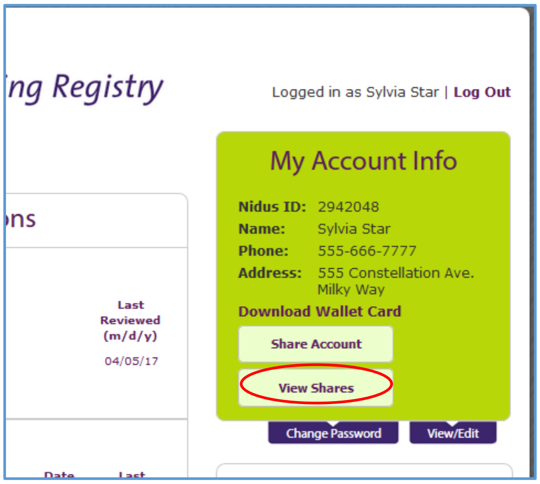


Click on **Share Document** to grant access of your document to trusted individuals.

Enter their email address and click **Share**

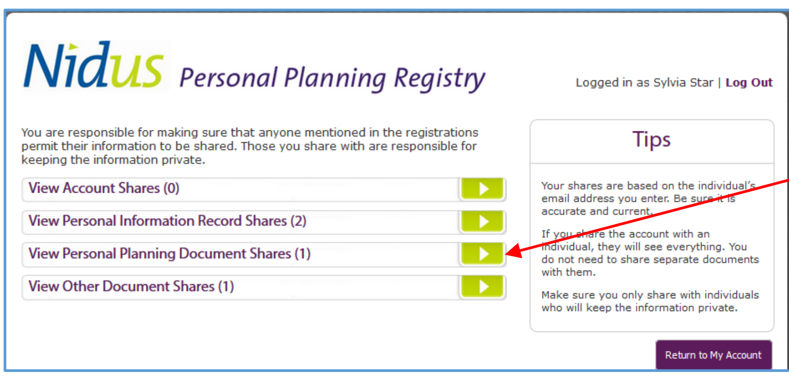
Click button at bottom – Return to My Account.

5. Back at Account/Welcome page.

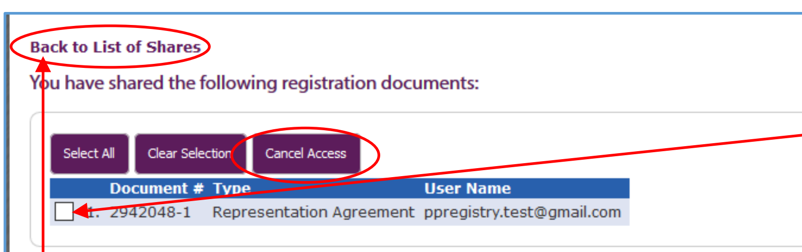


Click **View Shares** in the green container.

- 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 emai address such as 'info@' or 'reception@'



Here you are able to click on the link and see who you shared your documents with.



For example, Sylvia shared her Representation Agreement.

You can revoke the Access to an individual by selecting the **check box** and click **Cancel Access.**

If someone changes their email address, you need to Cancel Access for their old email and then Share with their new email.

Click 'Back to List of Shares' to return.