Nidus is a Latin term for nest: symbolizing support and safety.

Based on legislation and/or practices in the province of British Columbia. This is for information – not legal advice. © Jan. 2025

## **'HOW TO' FOR THE NIDUS REGISTRY**

These instructions are for self-registration NOT for legal professionals. Keep as a reference.

The Nidus Registry is BC's Registry for legal personal planning documents. It is voluntary.

The Nidus Registry is online for you to manage it yourself. You must register online.

You cannot use the Nidus Registry to change names of those appointed in a legal document. Changing names equals making a new legal document. See about Making Changes on p. 14.

## An Overview of the Nidus Registry – nidusregistry.ca



### Who can register?

- Adults or youth who cognitively understand the registry service and can give informed consent.
- Someone who has legal authority to act on behalf of someone else:
  - > Parents or (guardians) can act for minor children (in BC, a minor is under 19 years of age).
  - > A representative or alternate rep. who is named in the adult's Representation Agreement.
  - > An attorney or alternate appointed in an Enduring Power of Attorney made by the adult.
  - > The Public Guardian & Trustee (PGT) as committee of adult's estate.
  - > An individual or corporation appointed by court-order to be adult's committee.

**NOTE:** Paid staff, social workers, home share provider, friend, etc can give technical help – but cannot accept the Terms & Conditions or make up a password or put their email address. Someone listed above must be physically present for registration to make a private password and accept Terms & Conditions.

A lawyer or notary public or their staff can create an Account and register on behalf of a client (with client's consent) – ONLY if authorized by the Nidus Registry and must sign-in as a Registration Agent.

## Get Started:

1) Sign Up OR Log In

2) Register

## Is there an existing Nidus Registry Account?

- If NO, start at Sign Up (see below)
- If YES, go to Log In (see page 4)\*\*
- If not sure, email registry@nidus.ca and provide the first and last name of Account Holder (person whose information is being registered)

\*\* Generally there is only one Nidus Registry Account per person.

## Go to nidusregistry.ca, click Sign Up

If new to Nidus Registry and NO existing Nidus Registry Account, first step is to create an Account, then make a registration.



This is information, not legal advice Based on legislation and/or practices in BC © Jan. 2025

Account	Contact Information	Personal Identifiers	Verify	
gn Up - Crea	te Your Acc	ount		
Account Informatio	n			
Enter Names for t	the individual be	eing registered.		
First Name:				
4iddle Name:			•	
Last Name:				
Common Name:				
Email Address:				
Confirm Email				
Password (At east 6				
characters, with at least 1 number	r			
and upper case etter):				
Confirm Password:				
	*I accept th	e Terms & Conditi	ions.	
	I consent to communicat reminder to registrations	electronic ions from Nidus for review my 5.	а	
	<ul> <li>I consent to communicat news and up education, a</li> </ul>	electronic ions from Nidus for odates on the law, ind the Registry.		

After click Sign Up, next web page has progress bar at the top to show the steps to create an Account. The page opens at step one.

Enter **name of person** whose information is being registered. They are called the Account Holder.

If you are legally authorized to register on behalf of someone, put their name, not yours.

If something happens to the Account Holder, a search of the Nidus Registry starts with the person's name and their personal identifiers, then the search will show who to call.

Enter email address to be the contact for the Nidus Registry. Sometimes the email address will not be for the person being registered. If there is no email for someone with legal authority, use ra@nidus.ca (it can be changed later.)

ONLY certain people can 'Accept Terms & Conditions' – see previous page.

0	<u>-(○)</u>		-
Account nformation	Contact Information	Personal Identifiers	Verify
n Up - Creat	te Your Acc	ount	
ccount Information	n		
nter Names for t	he individual be	eing registered.	
First Name:			
liddle Name:			
Last Name:			
Common Name:			
Email Address:			
Confirm Email			
Password (At east 6			
haracters, with t least 1 number			
nd upper case atter):			
Confirm assword:			
	*I accept th	e Terms & Cond	itions.
	<ul> <li>I consent to communicat reminder to registrations</li> </ul>	electronic ions from Nidus f review my	or a
	I consent to	electronic	
	communicat news and up education, a	ons from Nidus fo dates on the law, nd the Registry.	or ,

See progress bar at top for steps to create a Nidus Registry Account

**STEP TWO** – Contact Information

Enter **current** contact information for person being registered (Account Holder). Even if current place is temporary – like a hospital. Or, if the address is for a care facility.

- > This is not about sending mail.
- In legal terms, contact information is like another identifier
   it provides proof of residence for the person.
- > You can update contact information. For example, if the person moves.

STEP THREE - Personal Identifiers

Enter at least two personal identifiers for the Account Holder.

- For health care matters, the most commonly searched identifiers are date of birth and provincial health number (care card/BC Services card).
- Other identifiers are driver's licence or BC ID, Social Insurance Number, Indian Status, Passport Number.

\*If you get error message that values are used it usually means there is <u>an existing Registry Account</u>. Email <u>registry@nidus.ca</u>

STEP FOUR – Verify

This is your chance to proofread. You can edit information.

Click 'Submit' when everything is correct. Then register (see page 5).

## Log In – if existing Account

• This is for logging into the existing Account. (This is NOT for legal professionals, see page 13)



## Register

- After Create Account (**Submit**), come to the Account/Welcome page.
- When successful **Log In**, come to the Account/Welcome page.



### What are the Options to register?



Except for audio and video files, documents registered (uploaded) must be in **PDF format**. This may involve getting the hard copy original, scanned. See p. X for tips.

The Personal Information Record is a type of registration that involves typing in information online; there is no document to upload (or be scanned).

**Scroll down** to Registration Options and select an option.

Registrations will show up in one of the containers, according to the category. The listed registration in the container is a link that you can click on to see the information you entered and the document you uploaded (if you did).

If you don't make a registration it will say in the container. This is for your information it is not a message to tell you what to do. You choose the option.

A '**Personal Information Record**' is a type of registration for entering information online – like emergency contacts, allergies, name and location of doctor/clinic, etc See page 9.

The next options are types of legal procedures and documents adults make for **Personal Planning** (not all are essential or relevant to everyone).

Click 'More Options' for other options related to personal planning.

More resources on personal planning at page 14.

Under **'Other Documents**' people might upload a copy of a medication chart, insurance policy, travel itinerary, RDSP, Will, advance care plan, living will, etc. See page 7.

You can also register small video and audio files – a video of signing a legal document; a statement of beliefs (for decision-makers, survivors). See acceptable formats and file size when click on option.

### **Register Personal Information Record**



When you register a Personal Information Record under Registration Options, the first step is payment.

After payment, it always starts at the page for Emergency Info.

You can type in as much information as you want and later you can change or add – there is no additional cost.

See the bar at the top of the page. Unlike with other types of registrations, this bar does not operate like a progress bar. You do not go in steps – click the name of the topic in any order you want.

### **Register a Personal Planning Document**

### Can choose to Upload Later

The following is an example when registering a Representation Agreement.



To register a type of personal planning document, it is always an option to 'upload.' Uploading means storing a copy of the completed legal document. The upload must be in PDF format.

If the original hard copy is not yet scanned in PDF format at the time of registering, choose 'Later' for the upload and carry on with typing in information to register.

See p. 8 for instructions on how to upload later at no additional cost.

Make sure the upload is all pages in one file. If the scanner only does individual pages it will not work – only one page will be uploaded. To correct the mistake, email registry@nidus.ca There may be a fee to cover staff time to delete the wrong upload.

## **Register Notice of Revocation – an option for Personal Planning document.**



## **Register Other Documents**

Upload	Verify	Payment	Done
load Othe	r Docum	ent	
	Docum		
Jpload PDF File:		Choose File no file selected	
Title:			
omments:			
Permit Access:		Allow Health & Personal Inst Access Conv	itutions to
		<ul> <li>Allow a Registration Agent to</li> </ul>	Access Copy

Are you revoking an existing personal planning document that is registered?

If YES, it will be listed. Click on the name (it is a link) and follow the steps.

When you register the Notice of Revocation for a Registered Document, the Revocation will cover up (replace) the registered document.

You can also register a revocation that is not related to a registered document.

Select Other Documents under Registration Options to register/store documents such as insurance policies, RDSP, Will, medication chart, travel itinerary, contracts, etc.

#### Tips:

- Have the document in PDF format ready to be uploaded.
- For title make it generic like 'Current Will' or 'Home/Tenant Insurance' so you can replace with newer version.
- You may allow automatic access to authorized
   Nidus Registration Agents or Nidus Registry
   Access Users or leave blank or change later.
- After document is registered, you can share it with trusted individuals.

## View Registrations – AFTER they are registered.

Start at Account/Welcome page. Containers below Welcome show what is registered.

My Curr	ent Registratio	ons	
My Personal Information Reco	ord		
			Last Reviewed (m/d/y)
View My Record	Print My Record		05/07/24
My Personal Planning Docume	ents		
My Personal Planning Docume	ents Document #	Date Signed (m/d/y)	Last Reviewed (m/d/y)
My Personal Planning Docume Revocation of Power of Attorney 2016-06-12	2942048-5	Date Signed (m/d/y) 02/12/17	Last Reviewed (m/d/y) 02/11/19

This is an example of viewing a registered Representation Agreement for Syliva Star (fictional Account).

A Representation Agreement is a type of Personal Planning document so when it is registered, it appears as a link in the appropriate container.

Click on the link (Representation Agreement). See next page for details on viewing. (Click/view one registration at a time.)

For Nidus Registry: https://nidusregistry.ca/ | registry@nidus.ca

## View, Edit, Share Registrations – example for Representation Agreement

After click 'Representation Agreement' link as shown on p. 7, go to new web page to view it.

Document Information		Share Document		If you want to share this registration with someone
Туре:	Representation Agreemer	nt		you trust, click 'Share' and
Document Number:	2942048-1			enter their email address
Date Signed:	May 30, 2014			enter then eman address.
Last Updated:	January 7, 2025			
				If you want to change location
Document Location & Acces	s	Edit Information		of original or types of
Location of Original Document:	Svivia Star			
Address 1:	#34 - 2387 Condo Way			click Edit. Be sure to click 'Save
City:	Haney			Changes.'
Province:	British Columbia			-
Country:	Canada			For location of original he specific
Postal Code:	V1V 1V1			For location of original, be specific.
Phone:	555-666-8947			
More Details:	third drawer of file cabine	et in garage		If you uploaded a copy of the
Uploaded File:	View Document			personal planning document, you
Allow Financial & Legal:	No			
Allow Health & Personal:	Yes			will see a link "view Document -
Permit allowed to access copy:	Yes			click to view it, print it, or save it.
				See below if no file uploaded.
Appointee Information		Edit Appointees		If you need to update phone or
Bonnocontativo				address for those appointed in your
Name	Prion David Orion			legal nersonal planning desument
Phone:	778-555-7978 coll			legal personal planning document,
Other Phone:	//0-333-/8/8 Cell			click Edit for the Appointee container.
other Filone.			]	Be sure to click 'Save Changes '

## Upload Later – an option when register a personal planning document

If you chose 'Later' for the upload, when viewing, it will show 'No File.' Click Edit to enable the upload.

	Share Document
Type:	Representation Agreement
Document Number:	2942048-1
Date Signed:	May 30, 2014
Last Updated:	January 7, 2025
Document Location & Access	Edit Informatio
Location of Original Document:	Sylvia Star
Location of Original Document:	Sylvia Star
Address 1:	#34 - 2387 Condo Way
Location of Original Document:	Sylvia Star
Address 1:	#34 - 2387 Condo Way
City:	Haney
Location of Original Document:	Sylvia Star
Address 1:	#34 - 2387 Condo Way
City:	Haney
Province:	British Columbia
Location of Original Document:	Sylvia Star
Address 1:	#34 - 2387 Condo Way
City:	Haney
Province:	British Columbia
Country:	Canada
Location of Original Document:	Sylvia Star
Address 1:	#34 - 2387 Condo Way
City:	Haney
Province:	British Columbia
Country:	Canada
Postal Code:	V1V 1V1
Location of Original Document:	Sylvia Star
Address 1:	#34 - 2387 Condo Way
City:	Haney
Province:	British Columbia
Country:	Canada
Postal Code:	V1V 1V1
Phone:	555-666-8947
Location of Original Document:	Sylvia Star
Address 1:	#34 - 2387 Condo Way
City:	Haney
Province:	British Columbia
Country:	Canada
Postal Code:	V1V 1V1
Phone:	555-666-8947
More Details:	third drawer of file cabinet in garage
Location of Original Document:	Sylvia Star
Address 1:	#34 - 2387 Condo Way
City:	Haney
Province:	British Columbia
Country:	Canada
Postal Code:	V1V 1V1
Phone:	555-666-8947
More Details:	third grawer of file cabinet in garage
Uploaded File:	No file
Location of Original Document:	Sylvia Star
Address 1:	#34 - 2387 Condo Way
City:	Haney
Province:	British Columbia
Country:	Canada
Postal Code:	V1V 1V1
Phone:	555-666-8947
More Details:	third drawer of file cabinet in garage
Uploaded File:	No file
Allow Financial & Legal:	No
Location of Original Document:	Sylvia Star
Address 1:	#34 - 2387 Condo Way
City:	Haney
Province:	British Columbia
Country:	Canada
Postal Code:	V1V 1V1
Phone:	555-666-8947
More Details:	third grawer of file cabinet in garage
Uploaded File:	No file
Allow Financial & Legal:	No
Allow Health & Personal:	Yes

This is an example for a Representation Agreement that was registered but no copy was uploaded at the time.

Click Edit for the second container. You will see the option to locate the file to Upload.

The upload must match the information you typed in (like date of signing, names of appointees).

## **Update Account Holder Information**

Let's say the Account Holder moved. At the Welcome page, look to bright green container at right.





New web page shows Account Holder information in various containers.

Click Edit for specific container to update information.

Be sure to click 'Save Changes' after edit.

Click 'Return to Account' button to get back to Welcome page.

### Sharing

You can 'Share' registrations (see example below).



## Sharing – View & Manage

Decement #         Decement #         Decement #         Decement #         Dete       Last (m/d/y)         My Personal Information Record         Last (m/d/y)         View My Record       DS/07/24         Decement #       Date Last Signed Reviewed (m/d/y)         Date Last Signed Reviewed (m/d/y)         Decement #       Date Last Signed Reviewed (m/d/y)	Logged in (Sylvia Star)   Log Out Return To My Account My Account Info Nidus Registry 2942048 Temer Sylvia Star Phone: Sylvia Star Phone: Sylvia Star Phone: Sylvia Star Miky Way Down Cord Share Account View Shares Change Reswort ViewState	From the Welcome page, see buttons to view and manage shares. There is a button to share the Nidus Registry Account.
View Account Shares (0)         View Personal Information Record Shares (1)         View Other Document Shares (0)	Logged in (Sylvia Star)   Log Out Return To My Account Tips Your shares are based on the individual's accurate and current. If you share the account with an individual's have add accurrent, with an individual there add accurrent, with an individual share separate documents with them. Make sure you only share with individuals who will keep the information private.	Click View Shares button for a summary. Click on category for share you want to view. Click 'Return to Account' to get back to Welcome page.
Back to List of Shares         You have shared the following registration do         Select All         Clear Selection         Cancel Access         Document # Type         1. 2942048-1	user Name fictional@nidus.ca	Check box beside share information and then click on actions at top. Click link to go back to web page with list of shares.

When something is 'Shared,' the individual you share with has viewing access; they cannot make changes.

'Share' avoids giving the Log In password. Passwords should always be kept private – this is an important part of security for the Nidus Registry and its users – like you!

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## Wallet Cards

From the Nidus Registry, you can print personalized wallet cards at no cost.

- See link at green container to the right of the Welcome page (after something is registered).
- Do NOT write the password on the wallet card; keep the password private.

There are two wallet cards on each page you download to print. The wallet card is meant to be cut out, folded and laminated. On the **front is the Nidus ID** and the adult's first and last name.

Before laminating, you can write the name and phone number of the representative and alternate **on the back**.

Make a wallet card for each wallet, purse, glove compartment suitcase, and jacket.

- It's easy, it's practical, and it's in your control.
- Give a wallet card to neighbours. If they know you went to hospital, they can phone your representative.

Vid <mark>us</mark> Registry	Logged in	i (Sylvia Star)   Log C Return To My Accou
elcome Sylvie	My Account Info	
My Current Registrations	Nidus Registry ID:	5420508
My Personal Information Record	Name: Phone: Address:	Sylvia Star 555-666-7777 555 Constellation Ave.
My Personal Planning Documents	Download Walle Share Accourt	Milky Way et Card



## **Scanning Tips for Uploading**

For uploading, the completed document needs to be scanned in PDF format (unless it is a video/audio file – click on this type of registration to see allowable sizes and formats).

The Personal Information Record is the only type of registration that does not have an upload – information is typed in online in real time.

For uploading, the document must be scanned as **one file, not individual pages**. (A Notice of Revocation might be 1 page, but other documents may have many pages.)

Public libraries and businesses like Staples or UPS can help with scanning. You can also ask relatives and friends if they have a scanner – many workplaces have them.

There are also software programs and mobile phone Apps that can scan to PDF format.

## Information on Nidus Registry

### Do I have to register?

- No. Like with Wills, there is no requirement to file or register a Representation Agreement it's simply a good idea! Registries help with communication avoid hours spent searching.
- The BC government operates a voluntary Wills Registry, but Wills are for after death. Personal planning is for while you are alive it is more time sensitive to find information!
- The Online Nidus Registry was first launched in 2002, in partnership with the Law Society of BC.

### How much does it cost to register?

The only cost is for registration and it is a modest one-time fee. (No annual fees.)

- \$25.00 for the first registration (this includes creating the Nidus Registry Account).
- \$10.00 for each additional registration.
- Free to update information.
- Free to print wallet cards from the Nidus Registry (see page 12).
- Free to view, print and share registrations.

Fees to register are paid at the time of registration using your credit card online or funds from your PayPal Account if you have one.

You can also arrange IN ADVANCE of registration to get a coupon code from the Nidus Registry.

 You need to email registry@nidus.ca to find out how to pay and the amount. Coupon codes are not free. You pay the Nidus Registry (by e-transfer or send cheque by regular mail). After payment is received, the Nidus Registry will email you a coupon code to use.

#### Why do people register?

- Many people are using the Nidus Registry as part of emergency preparedness to register/store important information and copy of documents in case of damage or evacuation due to a wildfire, flood or earthquake.
- The Nidus Registry is accessible, facilitates communication, and helps keep track of information and documents all in one place.

#### What can be stored in the Nidus Registry?

- The Nidus Registry securely stores information you type in.
- The Nidus Registry can also store a copy of a document. This is the ultimate back-up. You store a copy by uploading a digital copy (scan of the original, in PDF format). See scanning tips on page 12.

#### Who operates the Nidus Registry?

- The BC government decided not to establish a Registry for personal planning documents, although the public wanted it. The Nidus Resource Centre took it on.
- The Nidus Registry is for storing information and a copy of documents. It can only respond to questions about the Nidus Registry service.
- See next page about resources on a wide variety of topics.

Legal professionals can register for clients but need to apply and get a special log in. Go to https://registry.nidus.ca/agent\_services/index.php click on Request Agent Account (in Tips at right).

## **Getting More Information at the Nidus Resource Centre**

#### **Role of Nidus Resource Centre**

- The Nidus Resource Centre is a non-profit charitable organization.
- The Nidus Resource Centre was established in 1995 by individuals and community groups who were involved in a grass-roots law reform that helped develop the Representation Agreement Act.
- The Nidus Resource Centre has expertise in Representation Agreements and the concept of personal planning.

#### Free information on various topics

- Go to Nidus Resource Centre website nidus.ca
- The Nidus Resource Centre has lots of resources, geared to self-help.

#### Free basic forms for making a Representation Agreement

Click and go to https://nidus.ca/ra-forms/

- Scroll down to RA7ALL, RA7H+P, etc.
- There are two buttons to click/download for each type of Agreement.
- Be sure to see page 2 at first button/download.

#### I did not use forms provided by Nidus. Can I still register? Can I get help?

- The Nidus Registry is for anyone to use. It is separate from the Nidus Resource Centre.
- The Nidus Resource Centre provides many details and tips on various topics. Resources at the website are free for everyone to access and use. Many are specific to BC legislation.
  - Even if you did not use Representation Agreement forms provided by Nidus, you may want to read the tips for the relevant type of Agreement – go to https://nidus.ca/raforms/ and click the first button/download (see page 2).

#### Information on Making Changes, Revoking (cancelling), and more

Click and go to https://nidus.ca/related-forms/

#### Personal help

Some personal help is available, as funding allows. Email info@nidus.ca for referral, if available.