

# Registration Agents

Procedures for staff of law & notary public firms to log in and to register for clients

*Nidus Registry*

# QUESTIONS? NEED HELP?

- ◎ Contact the Nidus Registry by email at [registry@nidus.ca](mailto:registry@nidus.ca)
  - Nidus Registry website – [nidusregistry.ca](http://nidusregistry.ca)

The Nidus Registry is BC's Registry for legal personal planning documents (and more):

- Representation Agreement
- Enduring Power of Attorney
- Advance Directive
- Revocations of above; resignations for RA and EPA.

*Nidus Registry*

# GETTING STARTED – request authorization

- ◎ The Nidus Registry is different – not part of BC Online. First step is to get authorized as a Registration Agent and get your Log In. It's free.
  - Click Registration Agent (page 7) and click 'Request Agent Account' under Tips.
- ◎ After submit request, Nidus Registry staff will email an application form (barring any related disciplinary reports by governing body).
  - An owner or partner of the firm completes application on behalf of the firm to be an 'Institutional Contact'. The role of the Institutional Contact is to: verify employees authorized to be Registration Agents remain eligible; help the Nidus Registry problem solve if any complaints; honour payment of Nidus Registry fees.

# GETTING STARTED – return application

- ◎ After receiving completed application, Nidus Registry staff will email Log In credentials.
  - Each staff of the law or notary public firm who will access the Nidus Registry must be authorized (submit application) and each is given a unique log-in.
  - Log in credentials are NOT transferrable.
    - The Nidus Registry must be notified if employee is terminated.
    - Even temporary replacement due to vacation or parental leave requires replacement staff to get their own log-in.

# IMPORTANT TO NOTE

## ◎ Notice of **Revocation**.

- The legislation sets out specific procedures for a client to revoke a Representation Agreement and/or Enduring Power of Attorney.
- The Nidus Resource Centre has fact sheets about this. Go to <https://nidus.ca/related-forms/>
- When a Notice of Revocation is registered it will replace (cover up) a previously registered Representation Agreement/Enduring Power of Attorney.

# IMPORTANT TO NOTE

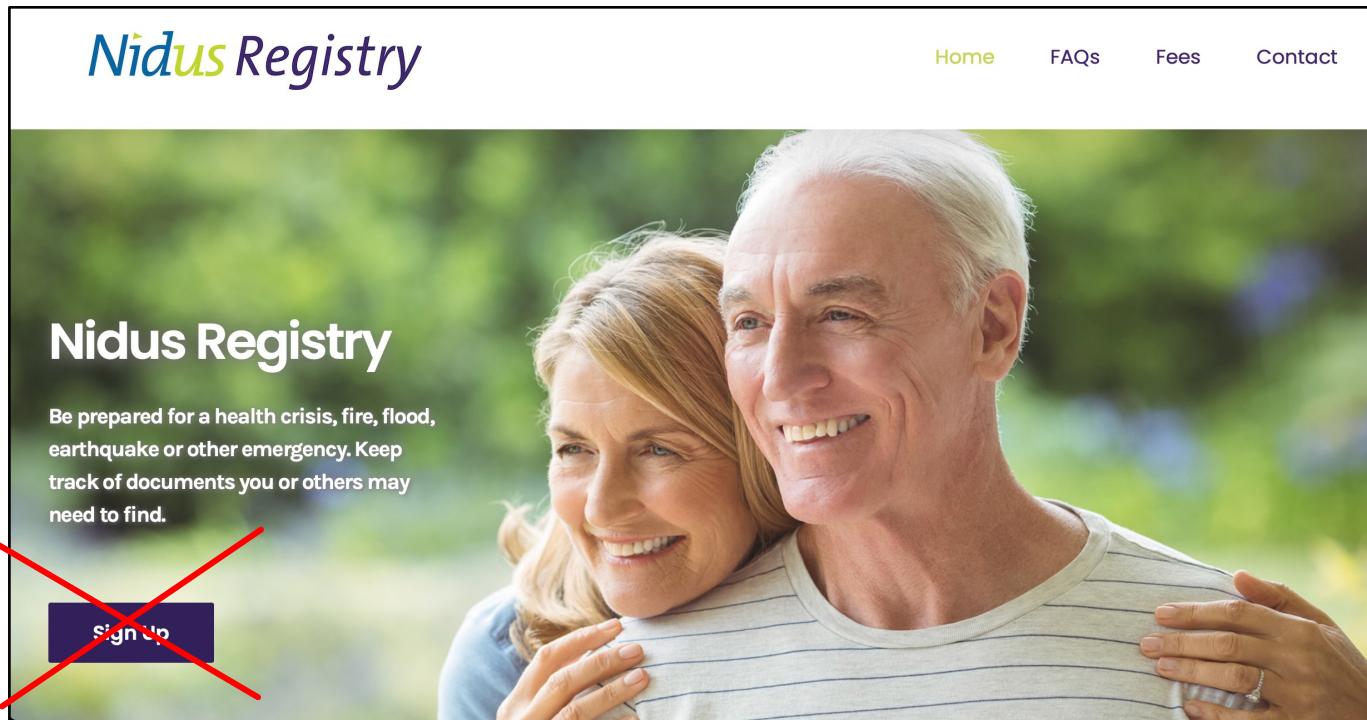
## ◎ Notice of **Resignation**.

- The legislation sets out specific procedures for someone (an appointee) to resign from a Representation Agreement and/or Enduring Power of Attorney.
- The Nidus Resource Centre has fact sheets about this. Go to <https://nidus.ca/related-forms/>
- There is a fee to register a resignation.
- Contact [registry@nidus.ca](mailto:registry@nidus.ca) if you are registering a resignation.

# IMPORTANT TO NOTE

- ◎ Certificates must be completed to recognize **out-of-BC** documents.
  - The legislation sets out specific procedures for accepting legal personal planning documents **made outside BC**.
  - The Nidus Resource Centre has fact sheets about this. Go to <https://nidus.ca/related-forms/>
  - After required Certificate is signed by solicitor of other jurisdiction, register document as an RA9 and/or EPA.

# Nidus Registry website - scroll down




Go to

<https://nidusregistry.ca/>


Scroll down to  
Registration Agents, then  
click (see next slide)



# Registration Agent Log In, click

[Home](#)[FAQs](#)[Fees](#)[Contact](#)

Nidus\_couple-in-kitchen



## Industry Professionals Login

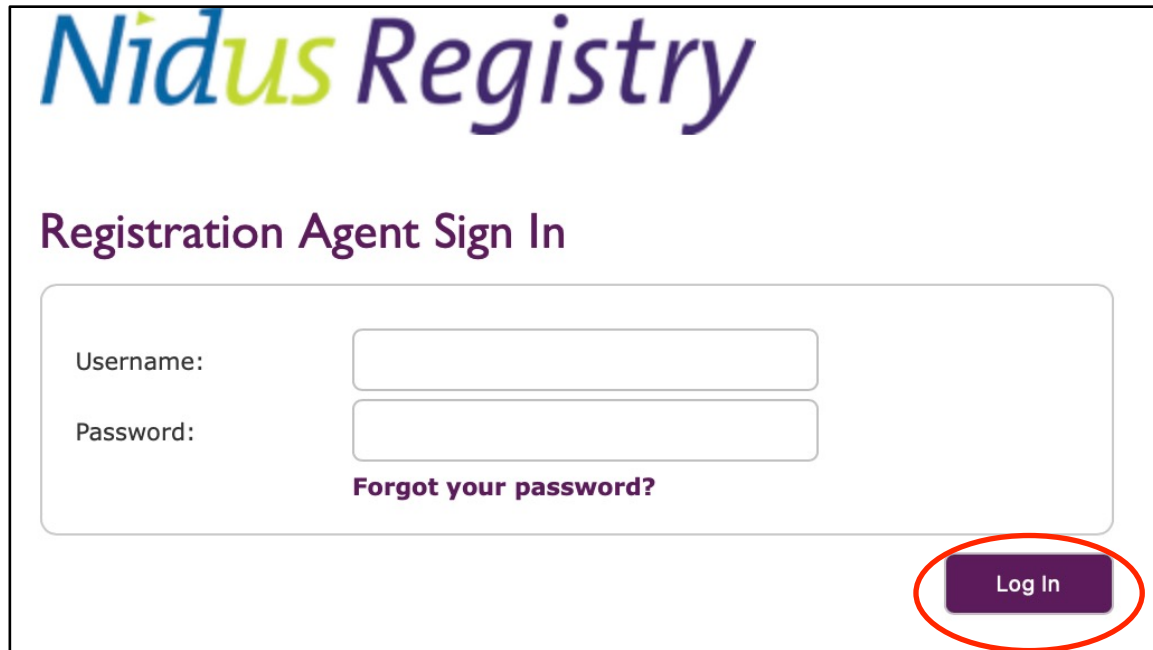
### Access Users

➔ Access Users Log In

### Registration Agents

➔ Registration Agents Log In

# Enter Username and Password



The image shows a web form for 'Nidus Registry' titled 'Registration Agent Sign In'. It contains two input fields: 'Username:' and 'Password:'. Below the password field is a link that says 'Forgot your password?'. At the bottom right of the form is a purple button labeled 'Log In', which is circled in red.

- Enter your Log-In credentials.
- Good idea to change the temporary password sent by Nidus:
  - Click 'Forgot Password'
  - At new web page, enter your user name and click 'Reset Password'
  - You will get an email with a link to make a new password (this is why it is important to let the Nidus Registry know if your email address changes)
  - After you make a new password, go back to the Sign In page, enter your User Name and the new Password, click Log In

# Select type of client - first option

*Nidus Registry*

Welcome Mike

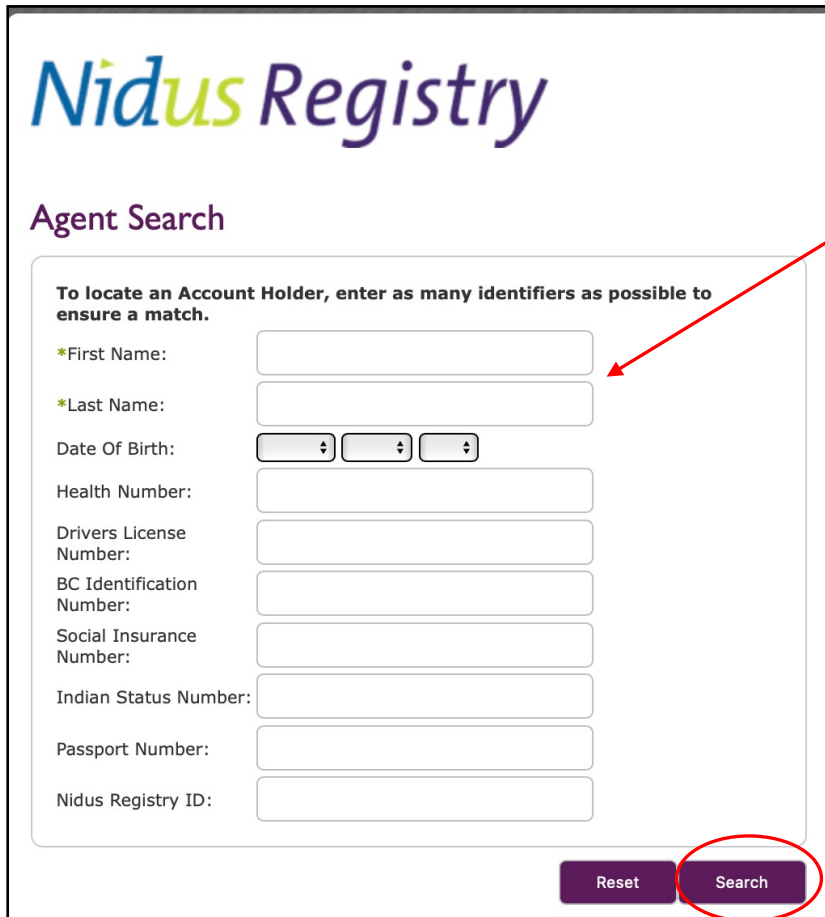
I am accessing the Registry because:

- ☒ My client is or wishes to be an Account Holder
- ☐ My client has legal authority to access the Registry Account on behalf of the Account Holder

Submit

# Search for existing account

**Clients may already have a Nidus Registry Account so the first action is to 'Search'**



**Nidus Registry**

**Agent Search**

To locate an Account Holder, enter as many identifiers as possible to ensure a match.

\*First Name:

\*Last Name:

Date Of Birth:

Health Number:

Drivers License Number:

BC Identification Number:

Social Insurance Number:

Indian Status Number:

Passport Number:

Nidus Registry ID:

- Enter first and last name of client
- Enter personal identifiers – as many as possible because you don't know what was used (and they may not recall)
  - Date of birth
  - Care Card (provincial health #)
  - BC ID or BC Driver's License
  - Social Insurance Number
  - Indian Status Number
  - Passport Number (changes - will need to update)
  - Nidus Registry ID (7 numbers assigned after register)

# Results of search - one of two options

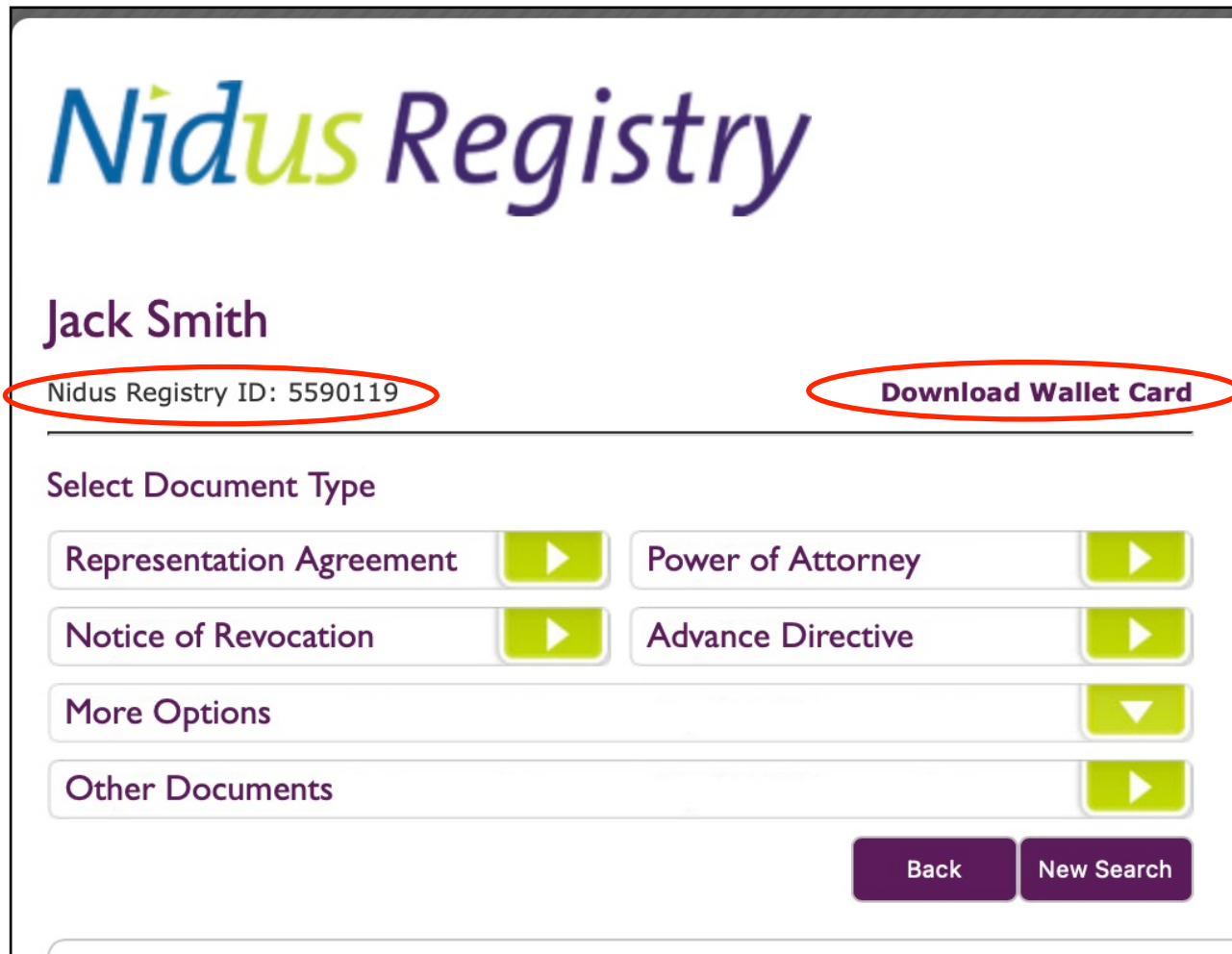
## ⦿ Match = Account found

- The client may have a Nidus Registry Account with registrations. Do NOT create another Account.
- If you can view registrations - these will be displayed in a list. Click the name of the registration to view it.
- See button to register new documents.

## ⦿ No Match = No Account – click to Create a New Account

- The client name and identifiers will automatically be entered from search information you already entered.
- See progress bar at top to show steps.
- Make up a password. This temporary password will be emailed to client and suggest change it.
- Enter client's email. If client does not have an email, use someone with legal authority like representative or alternate; or attorney in Enduring Power of Attorney. If none, use [ra@nidus.ca](mailto:ra@nidus.ca) (Do NOT use your/the firm email as you will be responsible for updating.)
- After create account, can register documents.

# Registering a document



The screenshot displays the Nidus Registry interface. At the top, the logo "Nidus Registry" is shown in blue and green. Below the logo, the user's name "Jack Smith" is displayed. Underneath the name, the "Nidus Registry ID: 5590119" is shown, circled in red. To the right of the ID, a link "Download Wallet Card" is also circled in red. Below this, a section titled "Select Document Type" contains four buttons: "Representation Agreement", "Power of Attorney", "Notice of Revocation", and "Advance Directive", each with a green right-pointing arrow. Below these are two more options: "More Options" with a green down-pointing arrow, and "Other Documents" with a green right-pointing arrow. At the bottom right, there are two buttons: "Back" and "New Search".

- ① Select a document to register
- ② Notice Nidus Registry ID and link to download wallet cards (These also show up for client when they log into their own account.)

# Register a document – e.g. of RA

## Register Representation Agreement

Date Document Signed: 2006 Jun 8

Location of Original Document: the Adult's residence

Location Address 1: 1890 - 124 Street

Location Address 2:

Location City: Surrey

Location Province: British Columbia

Location Country: Canada

Location Postal Code: V3Y 1X2

Location Phone: 604-599-9999

More Details: In the living room safe

Permit Access: ☐ Allow Financial & Legal Institutions

Permit Access: ☒ Allow Health & Personal Institutions

Register Copy - Upload PDF File (optional): ☐ Now ☐ Later

RA9.pdf

☒ Permit Allowed Institutions to Access Copy?

Next

- Enter the date document signed\*
- Can enter location of original (optional). Use 'More Details' to be specific.
- Enter permissions for access (these are third parties like banks, hospitals, the Public Guardian & Trustee)
- Can upload document (scanned in PDF format)

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# Register a document – Appointees

Register Representation Agreement - Appointees

Representative Clear

First Name:

Middle Name:

Last Name:

Email Address:

Phone:

Other Phone:

Other Phone:

Address 1:


Address 2:


City:

Province:

Country:

Postal Code:

Representative(s) 

Alternate Representative(s) 

- Enter appointee names – names cannot be changed (except for by Nidus staff). If you make a mistake email [registry@nidus.ca](mailto:registry@nidus.ca)
- Enter contact information for appointees – can be updated (or added) later.



# Register a document – Verify

## Register Representation Agreement

Document Information

Edit Information

Date Document Signed:

Jun 8, 2006

Location of Original Document:

the Adult's residence

Location Address 1:

1890 - 124 Street

Location Address 2:

Location City:

Surrey

Location Province:

British Columbia

Location Country:

Canada

Location Postal Code:

V3Y 1X2

Location Phone:

604-599-9999

More Details:

In the living room safe

Uploaded File:

RA9.pdf

☐ REMOVE this file (do not upload it)

NOTE:File removed when form submitted.

Allow Financial & Legal Institutions:

No

Allow Health & Personal Institutions:

Yes

Permit Allowed Institutions to Access Copy:

Yes

Appointee Information

Edit Appointees

Representative

First Name:

Jane

Middle Name:

Last Name:

Sadie

Email Address:

jane.sadie@nomail.com

Phone:

604-555-5283

Other Phone:

🕒 Proofread; edit if necessary.

# Register a document – Confirmation

Information Appointee Verify Payment Done

Thank you for Registering with the Nidus Personal Planning Registry

Print

Account Setup Confirmation

Nidus ID: 5590119

Account Holder: Jack Smith

Date Created: 2014 July 15

Document Registration Confirmation

Document Type: Representation Agreement

Document Number: 5590119-1

Copy Uploaded: RA9.pdf

Date Registered: 2014 July 17

Payment Method: Agent Account

Registered By: Registration Agent, Smith & Jones LLB

- ⦿ You can *Print* this page for your records.
- ⦿ You will also receive confirmation by email and so will the client (to email when Create Account).
- ⦿ Note the Nidus Registry ID.

# Agents do not pay online

- ⦿ Agents receive special pricing – 20% discount off regular fees, no GST
  - First registration for firm is free.
  - \$25 is regular fee to create account and first registration.
  - \$10 is regular fee for additional registrations.
- ⦿ Nidus will invoice firm for transactions - showing client name and Nidus Registry ID.
  - Firm can pay by cheque or e-transfer.
- ⦿ Agents will charge their client a fee for registration and for related administrative functions like data entry, reporting....

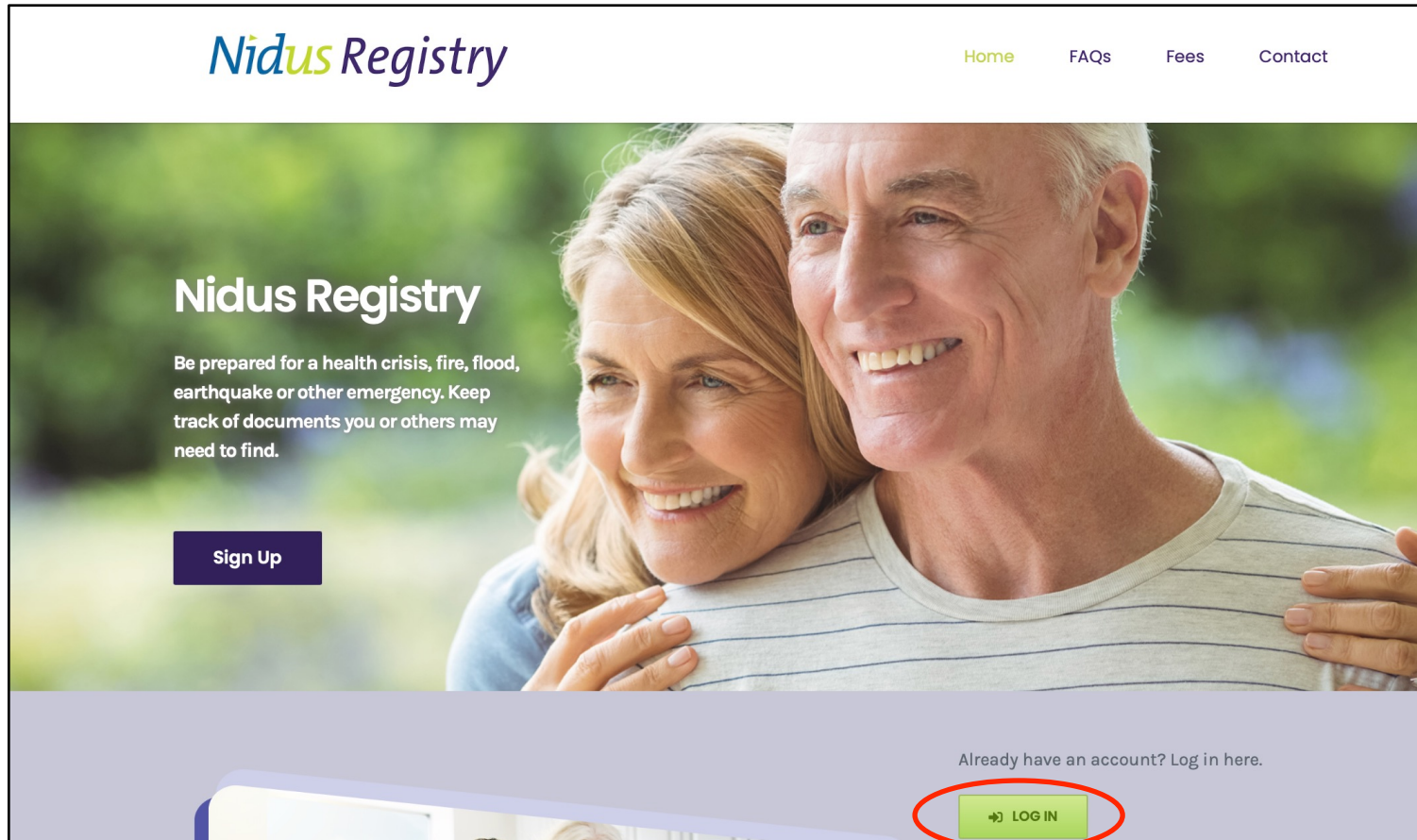
*Nidus Registry*

# For clients...

**Client instructions** for Nidus Registry – go to <https://nidus.ca/register/> scroll down

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# Client's log in (not for Agents)



Go to Nidus Registry website  
<https://nidusregistry.ca/>

Scroll down to green log in button and click

- At Access Your Account, the client enters the Nidus Registry ID and password, click Log In

**Nidus Registry**

# Resources at Nidus Resource Centre website

[nidus.ca](https://nidus.ca)

- ◎ The Nidus Resource Centre is a registered non-profit and charity.
  - The Registry is a service operated by the Resource Centre.
  - **Client Registry Instructions** at <https://nidus.ca/register/> - scroll down to 'How to Register'.
- ◎ See News & Events for education opportunities.
- ◎ Subscribe to the Nidus Newsletter.

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