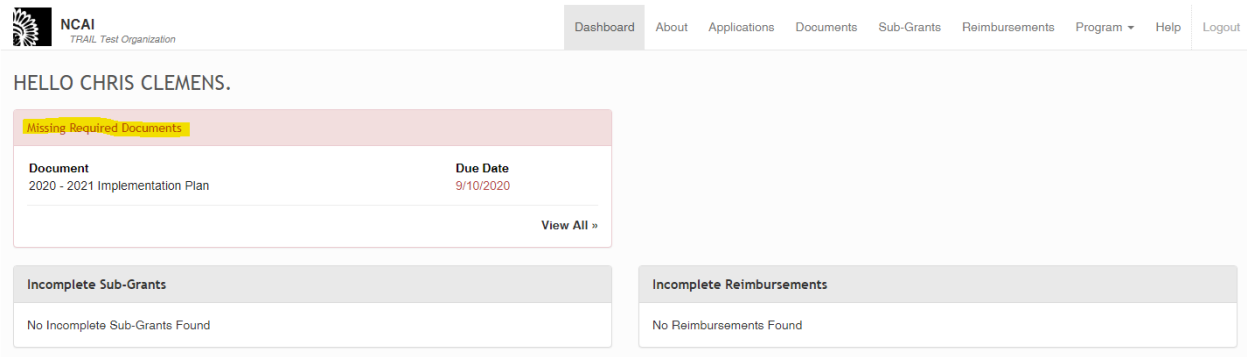
How to Upload Implementation Plans to the

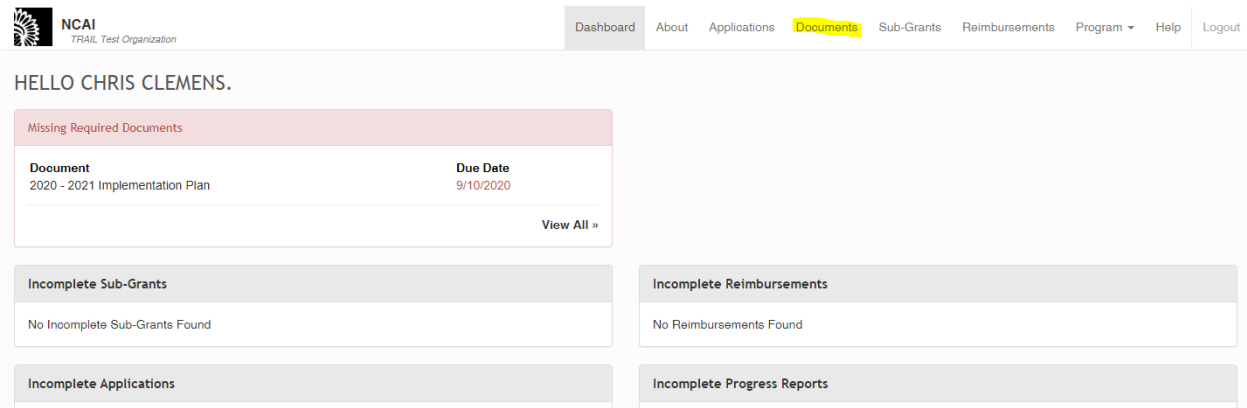
T.R.A.I.L. Documents Repository

(https://firstpic.force.com/ncai/login)

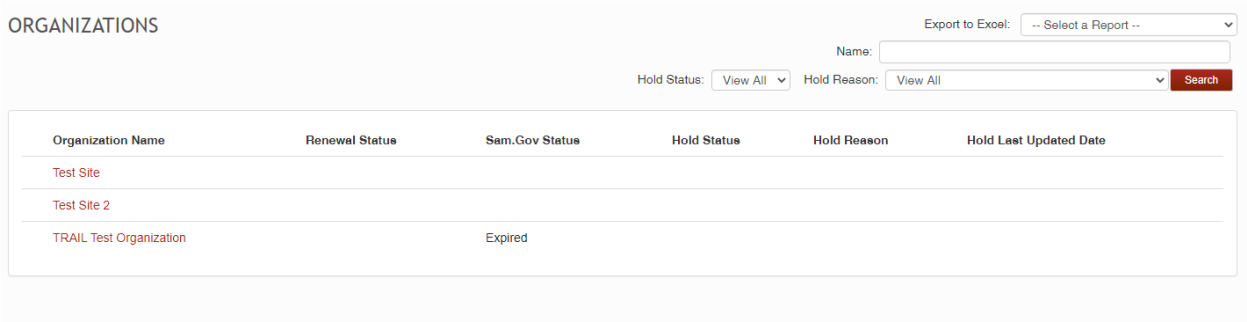
1. Log into the Online Reporting System. Upon logging in, if you have an implementation plan that is past-due, you will see it in the "Missing Required Documents" section.



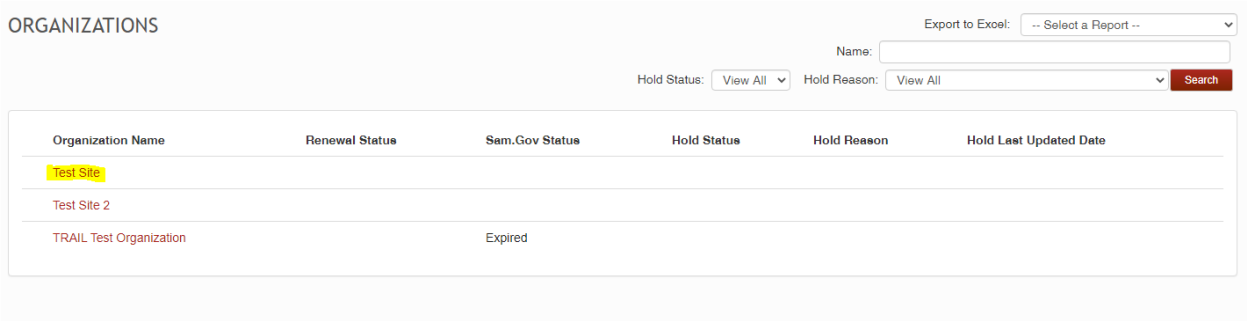
2. In order to access the space where you will upload the implementation plan, click on the "Documents" Tab at the top of your screen.



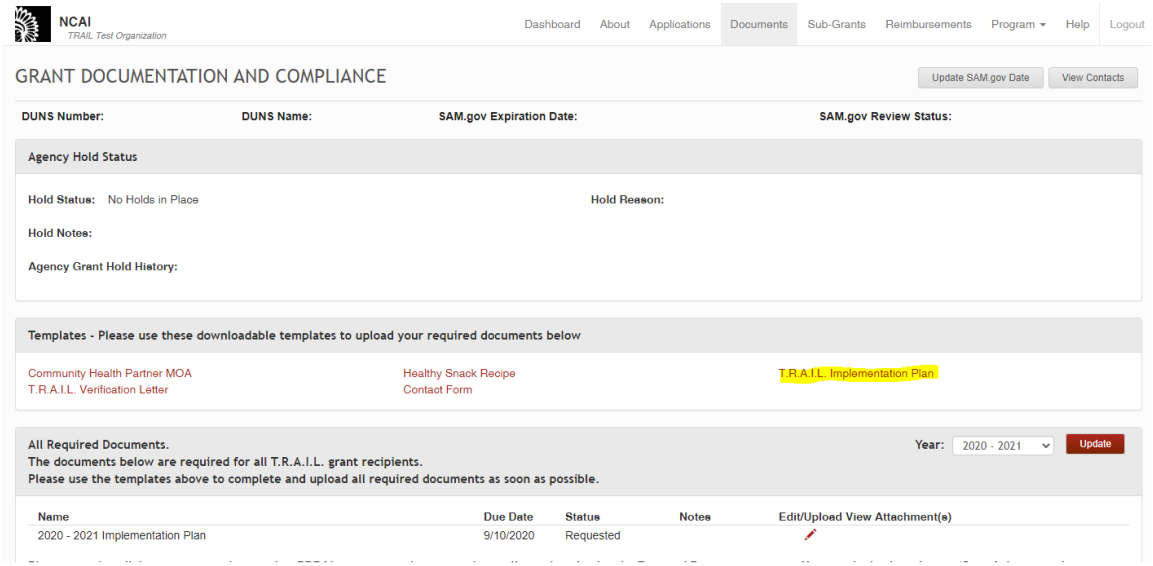
3. Upon clicking the “Documents” Tab, you will see the following screen. This screen, called the “Organizations Page” provides a list of your Organization, as well as your Organization’s sites. Because the Implementation Plan is a site-specific document (meaning it can differ from site to site), it will be accessible by clicking on your site(s) name(s). It will never be accessible by clicking on your organization name. Therefore, in the below example, I cannot access the space to upload my implementation plan by clicking “TRAIL Test Organization”. I have to click either “Test Site” or “Test Site 2”.



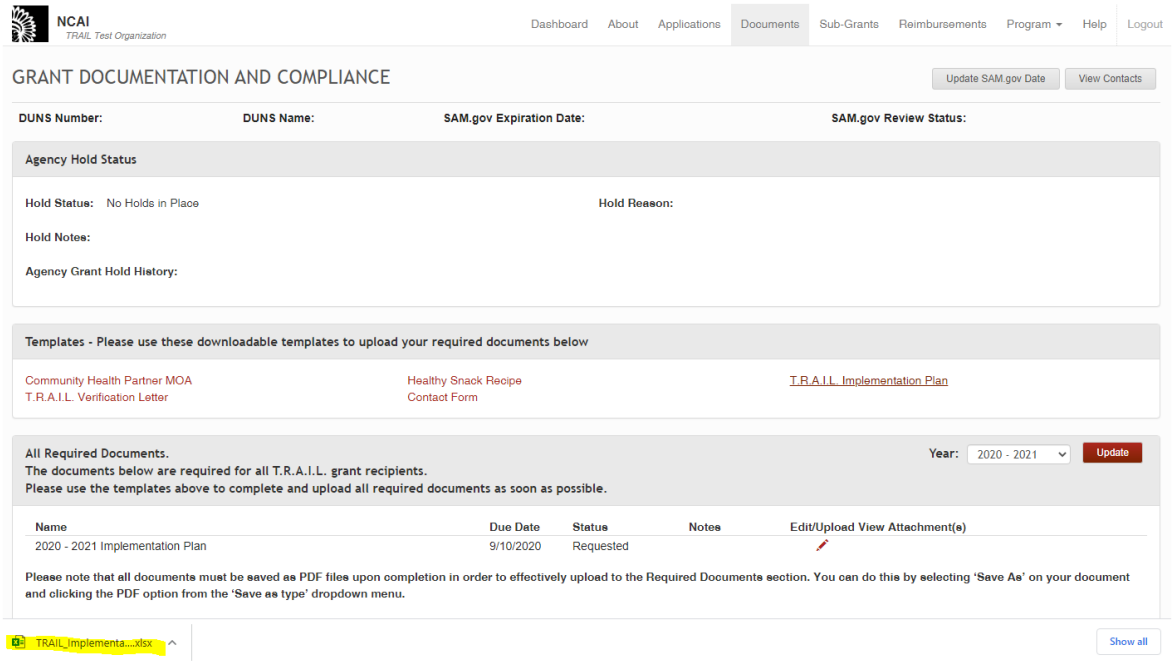
4. In this case, I need to update the Implementation Plan for “Test Site”. Therefore, I will click the highlighted link entitled “Test Site”.



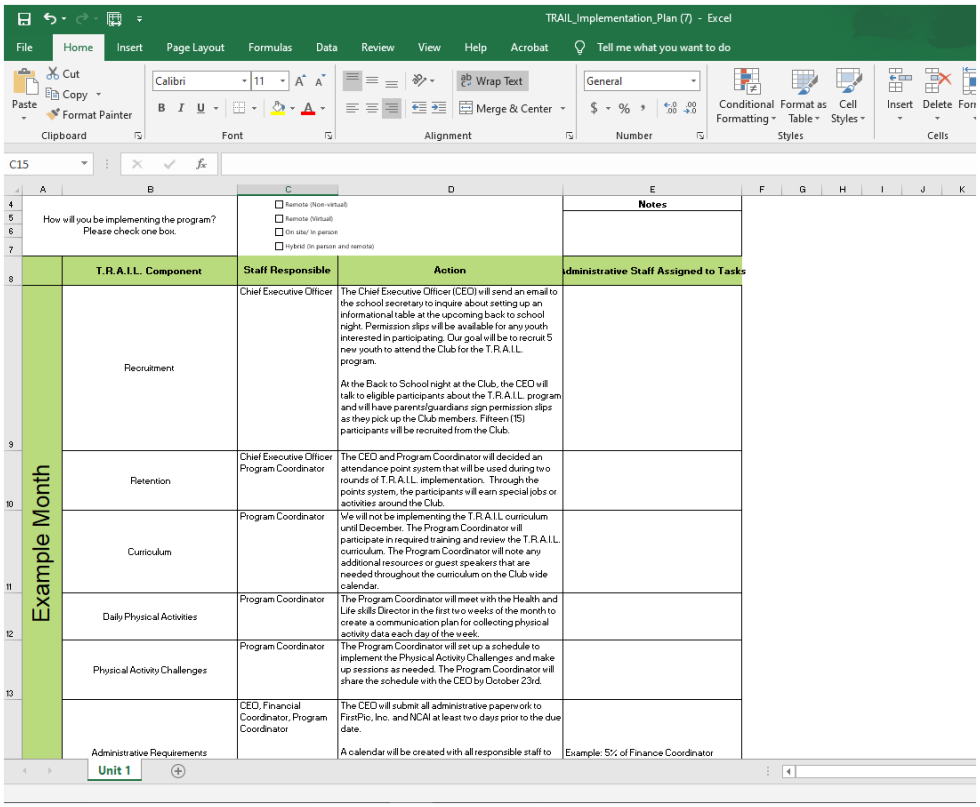
5. After clicking the relevant site, you will arrive at the “Grant Documentation and Compliance Page” for that site. From here, you will need to download the implementation plan template. To do so, click on the highlighted “T.R.A.I.L. Implementation Plan” link in the “Templates” section of the page.



6. The Implementation Plan template will download as and Excel document.



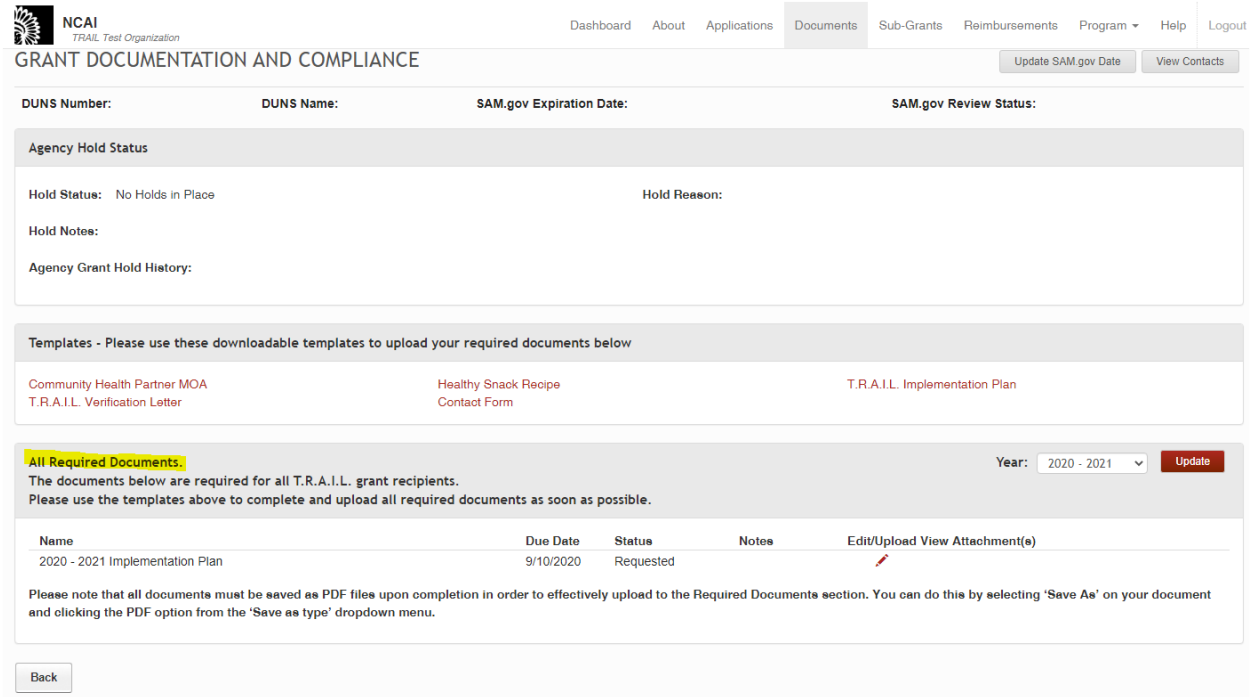
7. At this point, you would enter in the relevant information for your implementation plan into this file.



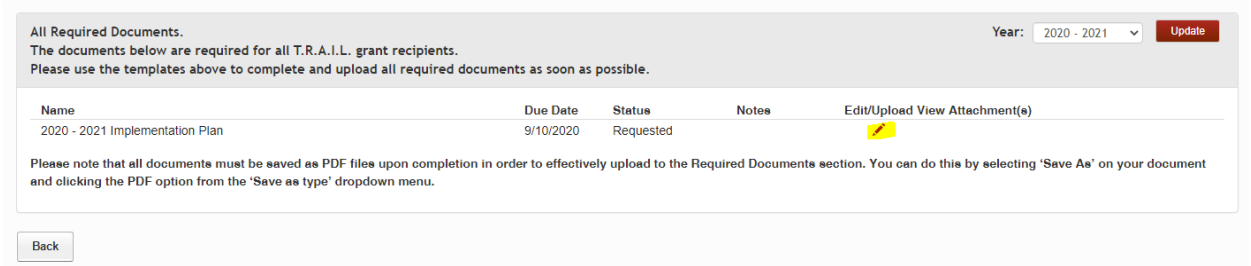
8. Once you have completed entering this information, please save it as a PDF (this is because you can only upload PDFs to the Documents Repository). In the case that you need to make any revisions to the Implementation Plan, we would recommend that you save the document as an Excel File on your computer as well. This would be so that, in the case that revisions are requested, you would have an Excel version of the document readily available to make the relevant updates to.

9. Once your implementation plan is finalized and you have saved it as a PDF, you will then upload it back to the Documents Repository. You will navigate to the same place that you downloaded the template – to the "Grant Documentation and Compliance Page" for the specific site (please repeat steps 1 through 5 to regain access to the correct section). In my case, it would be for the "Test Site".

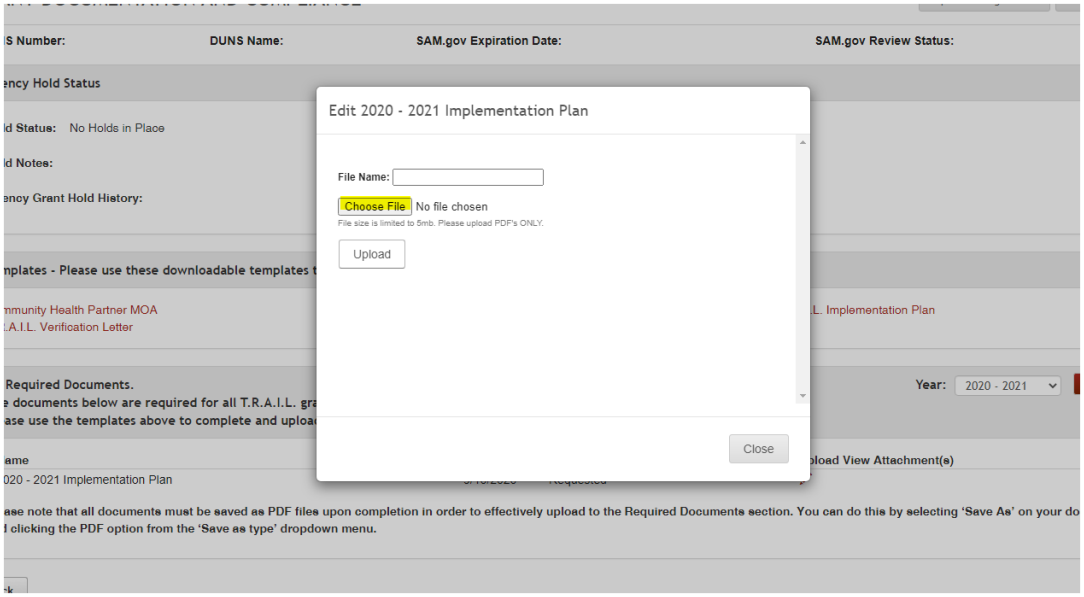
10. Once you have arrived back at the site-specific "Grant Documentation and Compliance Page", you will now be uploading your completed implementation plan. To do so, navigate down the page until you see the following "All Required Documents" section.



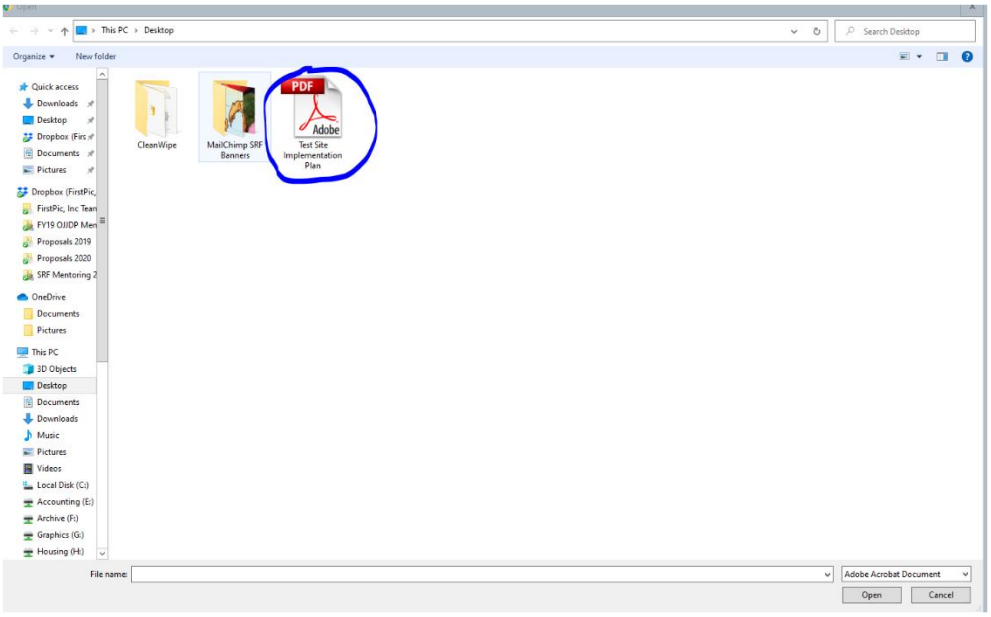
11. To upload your implementation plan, click the highlighted red pencil within the "All Required Documents" section.



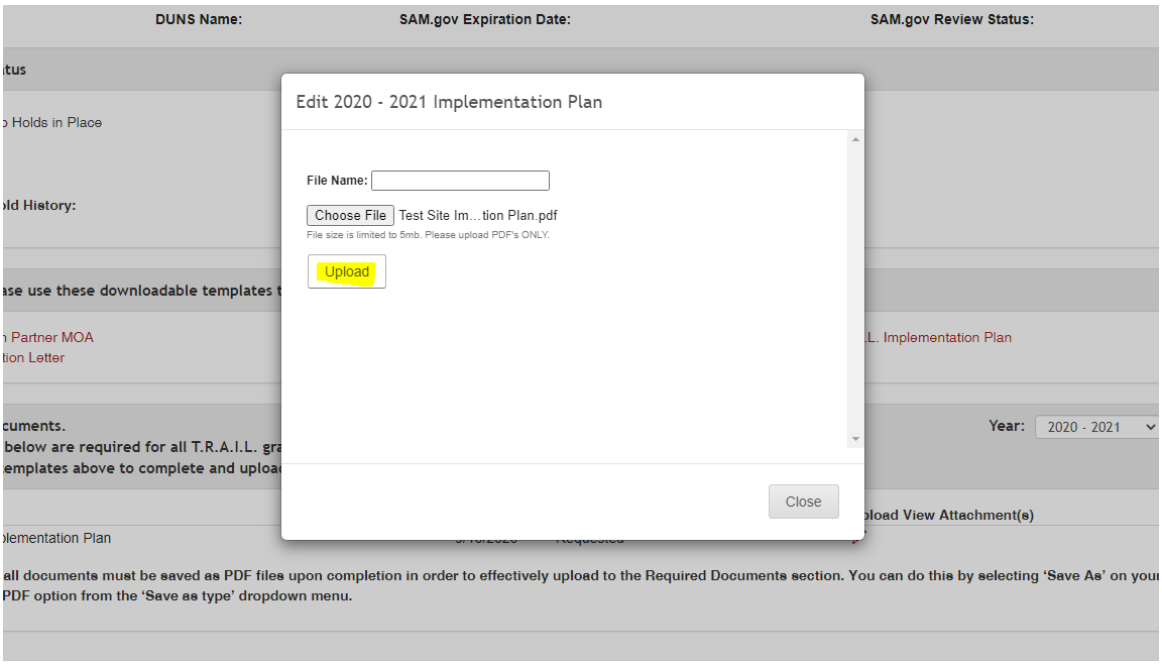
12. Clicking the red pencil will lead to the following screen. From here you will select “Choose File”.



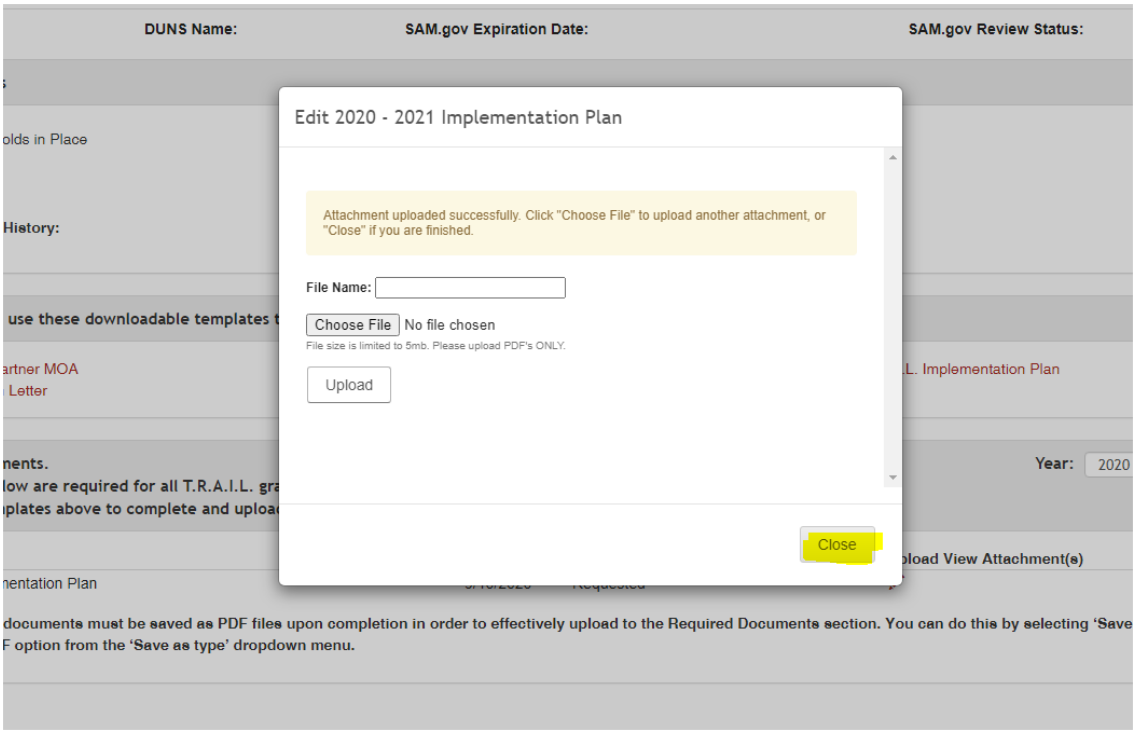
13. Once you select “Choose File”, you will find the PDF file of the implementation plan that you would have already saved. Click on the relevant PDF file.



14. Upon clicking on the correct file, select “Upload”.



15. Once you click “Upload”, you will see the following Success Message. This means that your implementation plan has successfully been uploaded to the site! Close out of this window by clicking the “Close” button.



16. Upon Closing that pop-up window, you will see that the implementation plan has now been submitted. At this time, it is ready for review and will either be approved or returned for revisions. In either case, you will receive an email informing you of the approval/revision request. If you receive a request for revision(s) and you need to upload a new implementation plan, please follow steps 1-15. If you have saved the Excel file to your computer, you will not need to re-download a template, but will simply update and re-save your existing file as a PDF.