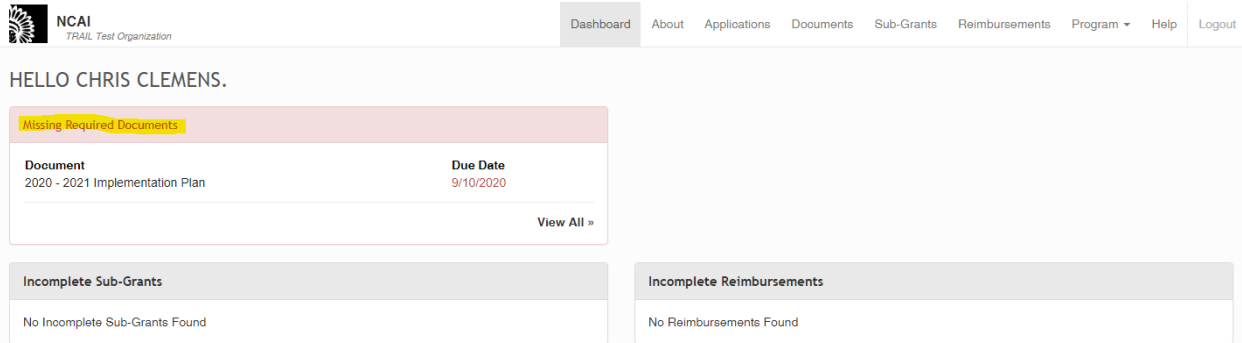


How to Upload Implementation Plans to the T.R.A.I.L. Documents Repository

(<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.



The screenshot shows the NCAI dashboard for user Chris Clemens. The top navigation bar includes links for Dashboard, About, Applications, Documents, Sub-Grants, Reimbursements, Program, Help, and Logout. The main content area displays a greeting and a 'Missing Required Documents' section. This section contains a table with one entry: a document titled '2020 - 2021 Implementation Plan' with a due date of '9/10/2020'. A 'View All »' link is provided below the table. To the right of this section are two boxes: 'Incomplete Sub-Grants' and 'Incomplete Reimbursements', both indicating that no items were found.

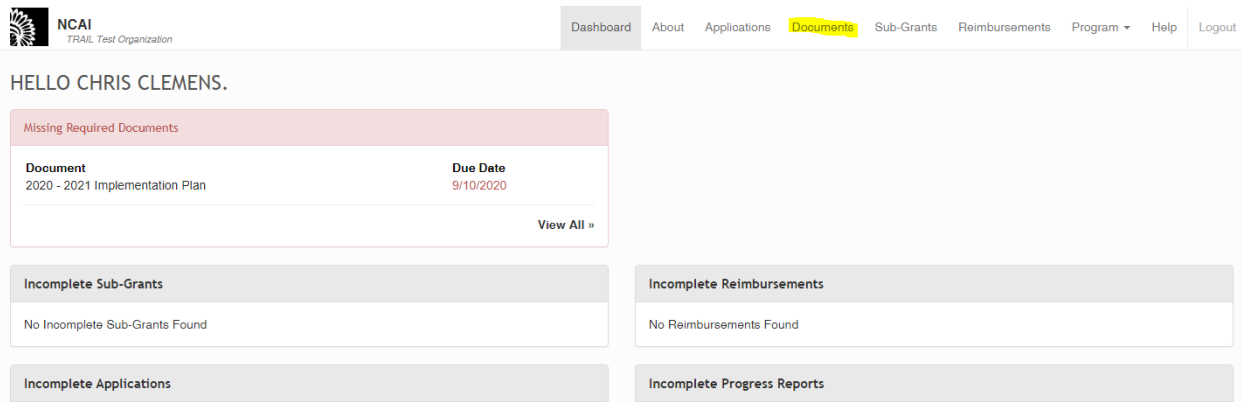
Document	Due Date
2020 - 2021 Implementation Plan	9/10/2020

[View All »](#)

Incomplete Sub-Grants
No Incomplete Sub-Grants Found

Incomplete Reimbursements
No Reimbursements Found

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.



This screenshot is identical to the previous one, but the 'Documents' tab in the top navigation bar is highlighted in yellow, indicating it is the active section.

Document	Due Date
2020 - 2021 Implementation Plan	9/10/2020

[View All »](#)

Incomplete Sub-Grants
No Incomplete Sub-Grants Found

Incomplete Reimbursements
No Reimbursements Found

Incomplete Applications

Incomplete Progress Reports

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”.

ORGANIZATIONS

Export to Excel: -- Select a Report --

Name:

Hold Status: View All Hold Reason: View All Search

Organization Name	Renewal Status	Sam.Gov Status	Hold Status	Hold Reason	Hold Last Updated Date
Test Site					
Test Site 2					
TRAIL Test Organization		Expired			

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

ORGANIZATIONS

Export to Excel: -- Select a Report --

Name:

Hold Status: View All Hold Reason: View All Search

Organization Name	Renewal Status	Sam.Gov Status	Hold Status	Hold Reason	Hold Last Updated Date
Test Site					
Test Site 2					
TRAIL Test Organization		Expired			

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.

NCAI
TRAIL Test Organization

Dashboard About Applications Documents Sub-Grants Reimbursements Program Help Logout

GRANT DOCUMENTATION AND COMPLIANCE

Update SAM.gov Date View Contacts

DUNS Number: DUNS Name: SAM.gov Expiration Date: SAM.gov Review Status:

Agency Hold Status

Hold Status: No Holds in Place Hold Reason:

Hold Notes:

Agency Grant Hold History:

Templates - Please use these downloadable templates to upload your required documents below


Community Health Partner MOA Healthy Snack Recipe T.R.A.I.L. Implementation Plan
T.R.A.I.L. Verification Letter Contact Form

All Required Documents.
The documents below are required for all T.R.A.I.L. grant recipients.
Please use the templates above to complete and upload all required documents as soon as possible.

Year: 2020 - 2021 Update

Name	Due Date	Status	Notes	Edit/Upload View Attachment(s)
2020 - 2021 Implementation Plan	9/10/2020	Requested		

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.


NCAI
TRAIL Test Organization

[Dashboard](#)
[About](#)
[Applications](#)
[Documents](#)
[Sub-Grants](#)
[Reimbursements](#)
[Program](#)
[Help](#)
[Logout](#)

GRANT DOCUMENTATION AND COMPLIANCE

[Update SAM.gov Date](#)
[View Contacts](#)

DUNS Number: **DUNS Name:** **SAM.gov Expiration Date:** **SAM.gov Review Status:**

Agency Hold Status

Hold Status: No Holds in Place **Hold Reason:**

Hold Notes:


Agency Grant Hold History:

Templates - Please use these downloadable templates to upload your required documents below

[Community Health Partner MOA](#) [Healthy Snack Recipe](#) [T.R.A.I.L. Implementation Plan](#)
[T.R.A.I.L. Verification Letter](#) [Contact Form](#)

All Required Documents. **Year:** 2020 - 2021 [Update](#)

The documents below are required for all T.R.A.I.L. grant recipients.
Please use the templates above to complete and upload all required documents as soon as possible.

Name	Due Date	Status	Notes	Edit/Upload View Attachment(s)
2020 - 2021 Implementation Plan	9/10/2020	Requested		


Please note that all documents must be saved as PDF files upon completion in order to effectively upload to the Required Documents section. You can do this by selecting 'Save As' on your document and clicking the PDF option from the 'Save as type' dropdown menu.

[Back](#)

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

All Required Documents. **Year:** 2020 - 2021 [Update](#)

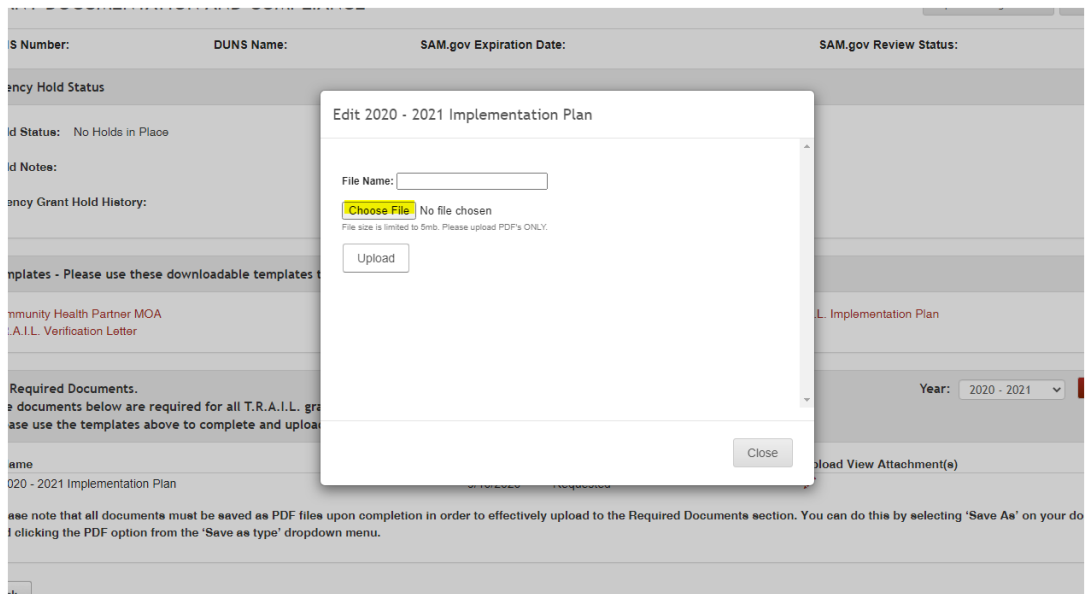
The documents below are required for all T.R.A.I.L. grant recipients.
Please use the templates above to complete and upload all required documents as soon as possible.

Name	Due Date	Status	Notes	Edit/Upload View Attachment(s)
2020 - 2021 Implementation Plan	9/10/2020	Requested		

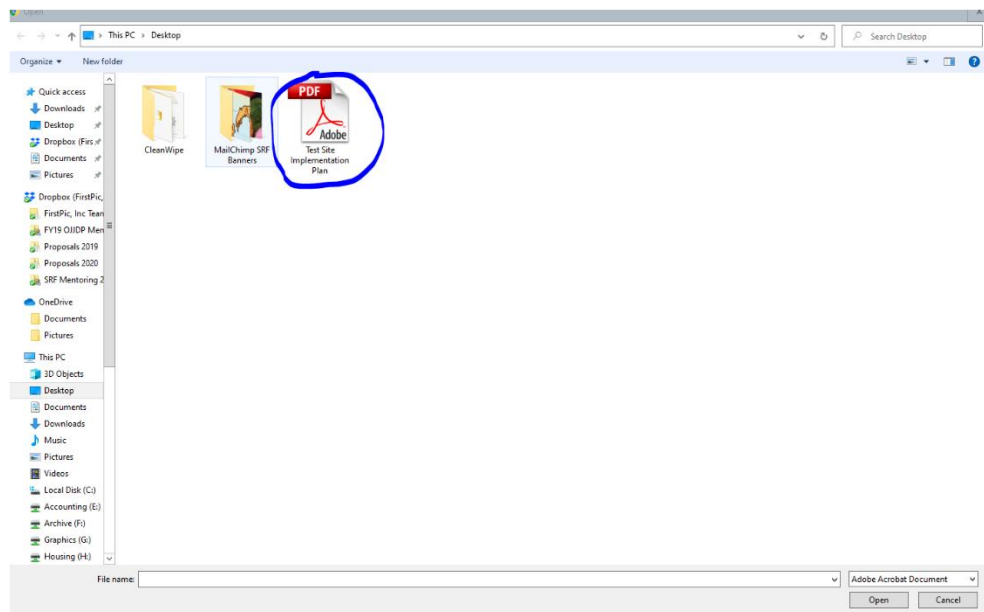
Please note that all documents must be saved as PDF files upon completion in order to effectively upload to the Required Documents section. You can do this by selecting 'Save As' on your document and clicking the PDF option from the 'Save as type' dropdown menu.

[Back](#)

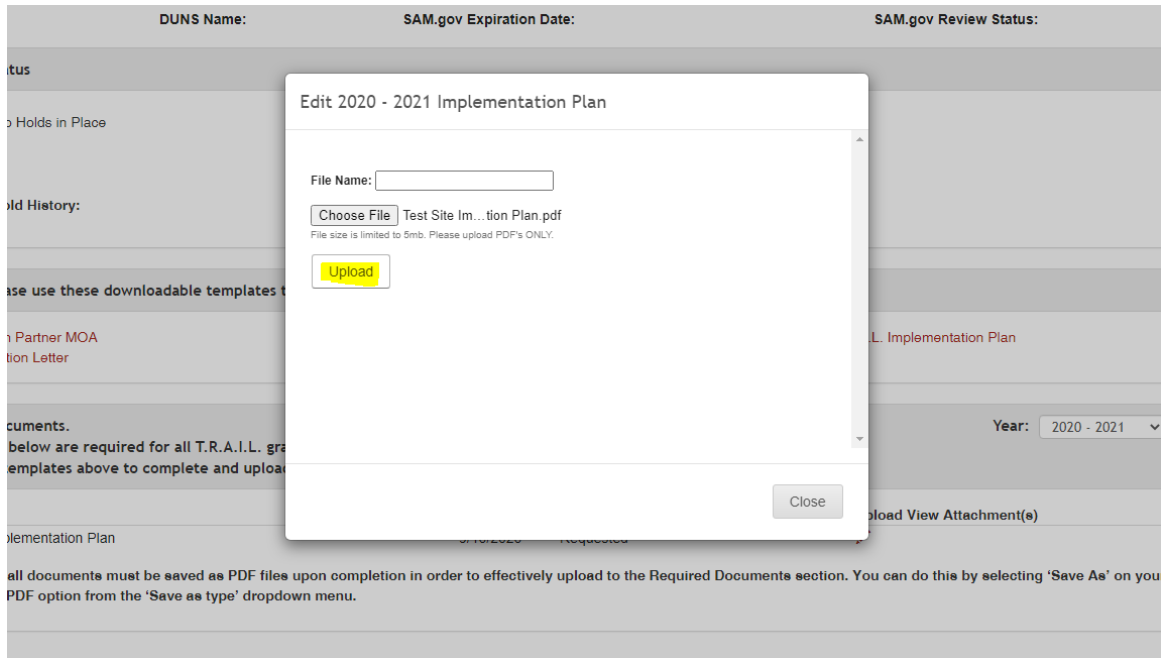
12. Clicking the red pencil will lead to the following screen. From here you will select “Choose File”.



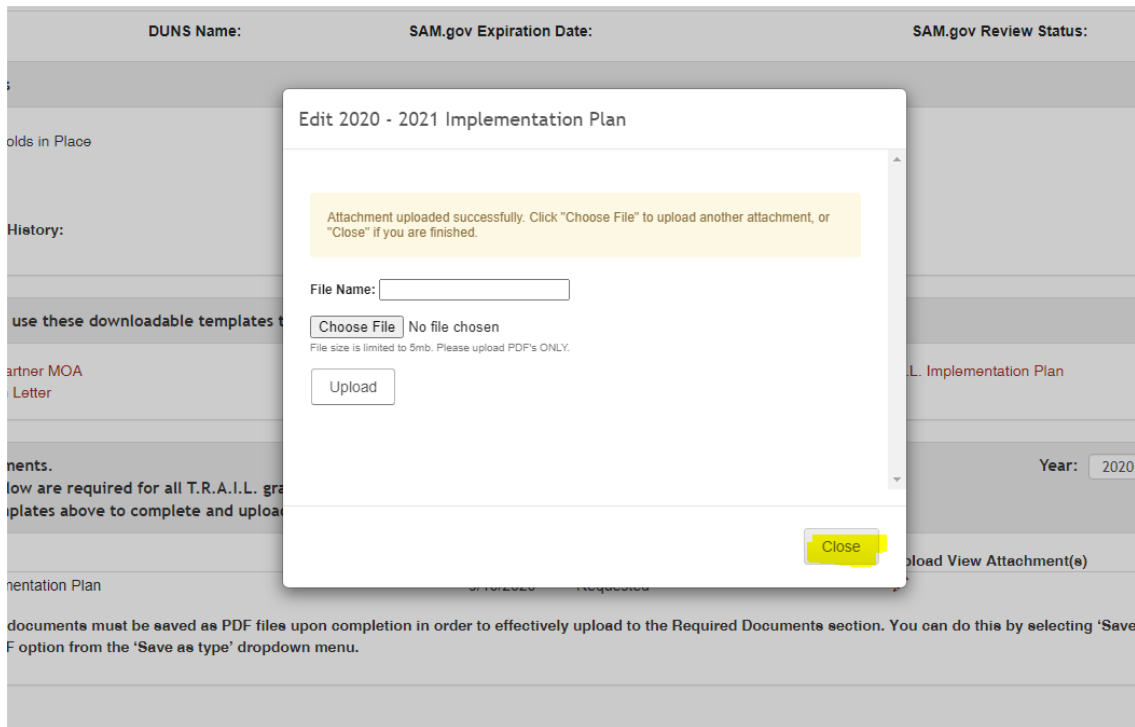
13. Once you select “Choose File”, you will find the PDF file of the implementation plan that you would have already saved. Click on the relevant PDF file.



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.