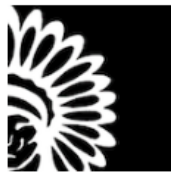




USING AND NAVIGATING THE DOCUMENTS REPOSITORY – PROGRAM COORDINATORS

1. Log in to your T.R.A.I.L. Online Reporting Site home page at <https://firstpic.force.com/ncai/>



To access this page, you have to log in to NCAI.

Username

Password

☐ Remember me

[Forgot Your Password?](#)

FirstPic employee? [Log In](#)



2. Once logged in, you will arrive at your Dashboard. From there, click on “Documents”.

NCAI
TRAIL Test Organization

Dashboard About Applications **Documents** Program Help Logout

HELLO EXAMPLE PERSON.

What's New/System Updates

- Clicking Update Budget from within the Sub-Grant detail page will trigger a warning message that no further reimbursement requests can be submitted until the budget has been reviewed and approved. If the user chooses to continue the budget will move to "Incomplete" status.
- The default sort order for all Reimbursement List pages will now be Request Date (was previously request ID).
- The approved amount will be visible on the reimbursement list page after final approval.

Missing Required Documents

Document	Due Date
2019-2020 Contact Form	4/29/2019

[View All »](#)

Incomplete Applications

Application Id	Status	Submitted Date
----------------	--------	----------------

Incomplete Progress Reports

No Incomplete Progress Reports Found

Incomplete PA Logs

No Incomplete PA Logs Found

Incomplete Mid-Year & Final Reports

No Incomplete Mid-Year & Final Reports Found

3. This will bring you to the “Organizations” Page. This is a list of your sites (TRAIL Test Site in the below example), as well as your organization (TRAIL Test Organization in the below example). To access site-specific documents (documents that are different per site, such as your implementation plans), click on your site(s). To access organization-specific documents (documents that apply for the entire organization, including contact forms and Community Health Partner MOAs), click on your organization.

NCAI
TRAIL Test Organization

Dashboard About Applications Documents Program Help Logout

ORGANIZATIONS

Export to Excel: -- Select a Report --

Name:

Hold Status: Hold Reason:

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



4. The “Grant Documentation and Compliance” page:

- If you click on the organization, you will go to your organization’s “Grant Documentation and Compliance” page. There, you will find a “Templates” section that includes templates for all relevant program documents (highlighted in yellow below), as well as an “All Required Documents” section for you to upload these documents once you have added necessary information (underlined in blue below).

NCAI
TRAIL Test Organization

Dashboard About Applications **Documents** Program Help Logout

GRANT DOCUMENTATION AND COMPLIANCE

Update SAM.gov Date View Contacts

DUNS Number: DUNS Name: Trail Org SAM.gov Expiration Date: 1/23/2023 SAM.gov Current Status: Active SAM.gov Review Status: Approved

Agency Hold Status

Hold Status: No Holds in Place Hold Reason:

Hold Notes:

Agency Grant Hold History:

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: 2019-2020 Update

Name	Due Date	Status	Notes	Edit/Upload View Attachment(s)
2019-2020 Community Healthy Partner Signed MOU	12/31/2020	Submitted		Test Document.pdf
2019-2020 Contact Form	4/29/2019	Sent Back	Revisions Needed	TRAIL_Implementation_Plan.pdf
2019-2020 Healthy Snack Recipe	4/29/2021	Requested		
2019-2020 TRAIL Verification Letter	4/30/2021	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

- If you click on the site(s), you will go to your site’s “Grant Documentation and Compliance” page. This page is similar to your organization-wide page, in that it has a “Templates” (highlighted in yellow) and “All Required Documents” (underlined in blue) section. However, you will notice that there is only one document listed in the “All Required Documents” section – the implementation plan. As your only site-specific document, this will be the only document you upload on the site level.

NCAI
TRAIL Test Organization

Dashboard About Applications **Documents** 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 Signed MOU
TRAIL Verification Letter

Healthy Snack Recipe
Contact Form

T.R.A.I.L. Implementation Plan

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: Filter by Year Update

Name	Due Date	Status	Notes	Edit/Upload View Attachment(s)
2019-2020 Implementation Plan	4/29/2021	Submitted		Example Implementation Plan.pdf

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

- In order to upload a required document, select one of the templates in the “Templates” section. Once you select the template, it will open as either a Word or Excel document.

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

Community Health Partner Signed MOU T.R.A.I.L. Verification Letter	Healthy Snack Recipe Contact Form	T.R.A.I.L. Implementation Plan
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Grant Specific Documents




Healthy_Snack_R...docx  Show all

You would then complete and **save as a PDF** (all completed documents MUST be saved as a PDF as PDFs are the only allowable file type that can be uploaded).

- When uploading the document, select the Edit/Upload Pencil within the “All Required Documents” section (circled in the picture below). You will also see that each document has a due date and a status; “Requested” means that it is still needed from your Org/site.

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: 2019-2020 Update

Name	Due Date	Status	Notes	Edit/Upload View Attachment(s)
2019-2020 Community Healthy Partner Signed MOU	12/31/2020	Submitted		 Test Document.pdf
2019-2020 Contact Form	4/29/2019	Sent Back	Revisions Needed	 TRAIL_Implementation_Plan .pdf
2019-2020 Healthy Snack Recipe	4/29/2021	Requested		
2019-2020 TRAIL Verification Letter	4/30/2021	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.

- Once you select the Pencil, the below box will appear. Select, “Choose File”, and select your saved PDF document.

Edit 2019-2020 Healthy Snack Recipe

File Name:

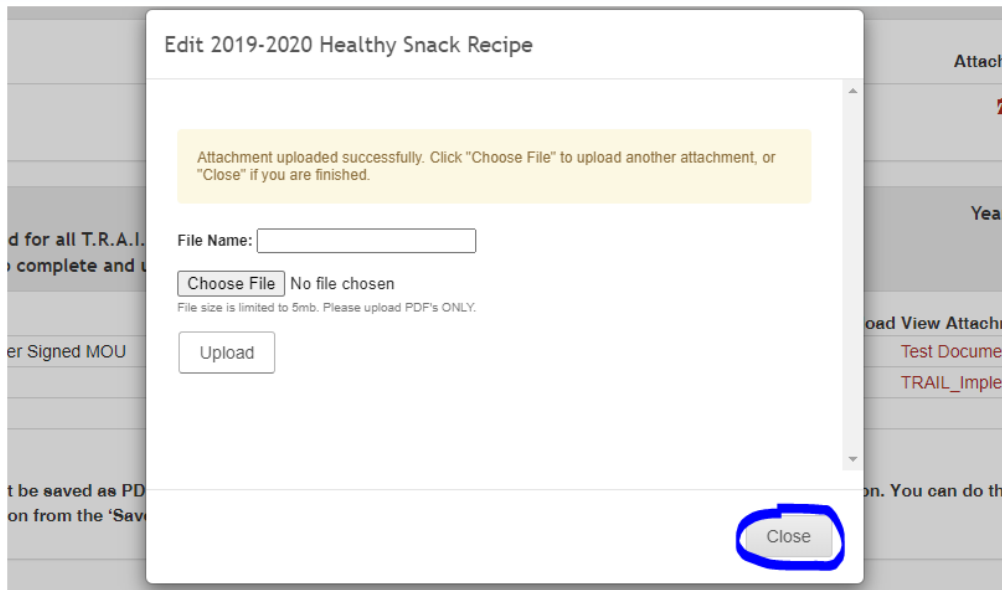
Choose File No file chosen

File size is limited to 5mb. Please upload PDF's ONLY.

Upload

Close

8. Once your document has been successfully uploaded, you will receive a notification indicating success, as seen below. Once this message is received, you may close the pop-up box by selecting the “close” button circled below.



9. Your attached document(s) will be visible in the “View Attachment(s)” column and can be selected at any time to view by clicking on the name of the document (underlined below).

All Required Documents. Year: 2019-2020 [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)
2019-2020 Community Healthy Partner Signed MOU	12/31/2020	Submitted		Test Document.pdf
2019-2020 Contact Form	4/29/2019	Sent Back	Revisions Needed	TRAIL_Implementation_Plan .pdf
2019-2020 Healthy Snack Recipe	4/29/2021	Submitted		Example Healthy Snacks.pdf
2019-2020 TRAIL Verification Letter	4/30/2021	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.

10. If at any point you need to return from the “Grants Document and Compliance” page to the “Organizations” Page (as seen in Step 3), simply either hit the “Back” button on your browser, or scroll to the bottom of the page and hit the “Back” button. However, if you have made any changes to this page (i.e. uploaded any documents), please do not hit “Back” on your browser. Please instead hit the “Back” button in the image below.

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: 2019-2020 [Update](#)

Name	Due Date	Status	Notes	Edit/Upload View Attachment(s)
2019-2020 Community Healthy Partner Signed MOU	12/31/2020	Submitted		Test Document.pdf
2019-2020 Contact Form	4/29/2019	Requested		Edit/Upload
2019-2020 Healthy Snack Recipe	4/29/2021	Requested		Edit/Upload
2019-2020 TRAIL Verification Letter	4/30/2021	Requested		Edit/Upload

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. All required documents will be reviewed by FirstPic, Inc. and NCAI, and then approved/returned as necessary.
- If a document is approved, you will receive an auto-email informing you of such (the status will also read as “Approved” in the Documents Repository itself).
 - If a document is returned for revisions, you will receive an auto-email informing you of this, as well as information as to why it was returned (the status will also change to “Sent Back” in the Documents Repository itself). Documents that are sent back will also show up on your dashboard (see image below).

NCAI
TRAIL Test Organization

[Dashboard](#)
[About](#)
[Applications](#)
[Documents](#)
[Program](#)
[Help](#)
[Logout](#)

HELLO EXAMPLE PERSON.

What's New/System Updates

- Clicking Update Budget from within the Sub-Grant detail page will trigger a warning message that no further reimbursement requests can be submitted until the budget has been reviewed and approved. If the user chooses to continue the budget will move to "Incomplete" status.
- The default sort order for all Reimbursement List pages will now be Request Date (was previously request ID).
- The approved amount will be visible on the reimbursement list page after final approval.

Missing Required Documents

Document	Due Date
2019-2020 Contact Form	4/29/2019

[View All](#)

Incomplete Applications

Application Id	Status	Submitted Date
No Incomplete Applications Found		

Incomplete Progress Reports

No Incomplete Progress Reports Found

Incomplete PA Logs

Incomplete Mid-Year & Final Reports



If a document is returned to you, please refer to the notes provided by the reviewer (this will be available to you in the Revision Request auto-email) before making changes and re-uploading your revised document using the same process outlined in steps 5-8 (if you did not save your initial document to make edits to, you will need to re-download a template from the Templates section (Step 4)).

12. In the case that one of your documents is past-due, it will also appear on your Dashboard under the “Missing Required Documents” section. Clicking on the “View All” button (circled below) will allow you to access the Documents Repository in order to upload this document.

NCAI
TRAIL Test Organization

Dashboard About Applications Documents Program Help Logout

HELLO EXAMPLE PERSON.

What's New/System Updates

- Clicking Update Budget from within the Sub-Grant detail page will trigger a warning message that no further reimbursement requests can be submitted until the budget has been reviewed and approved. If the user chooses to continue the budget will move to "Incomplete" status.
- The default sort order for all Reimbursement List pages will now be Request Date (was previously request ID).
- The approved amount will be visible on the reimbursement list page after final approval.

Missing Required Documents

Document	Due Date
2019-2020 Contact Form	4/29/2019

[View All »](#)

Incomplete Applications

Application Id	Status	Submitted Date
----------------	--------	----------------

Incomplete Progress Reports

No Incomplete Progress Reports Found

Incomplete PA Logs

No Incomplete PA Logs Found

Incomplete Mid-Year & Final Reports

No Incomplete Mid-Year & Final Reports Found

If you select the “View All” button, you will be taken directly to the “Grant Documentation and Compliance” page for your organization (to view site-specific documents, you will need to follow the process outlined in steps 2-3). Once you arrive at the “Grant Documents and Compliance” page, you will be able to follow steps 4-9 outlined above to upload your documents as needed.

NCAI
TRAIL Test Organization

Dashboard About Applications Documents Program Help Logout

GRANT DOCUMENTATION AND COMPLIANCE

Update SAM.gov Date View Contacts

DUNS Number: DUNS Name: Trail Org SAM.gov Expiration Date: SAM.gov Current Status: Expired SAM.gov Review Status: Submitted

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 Signed MOU T.R.A.I.L. Verification Letter	Healthy Snack Recipe Contact Form	T.R.A.I.L. Implementation Plan
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