

USING AND NAVIGATING THE DOCUMENTS REPOSITORY – SITE 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 the “About” Tab.

NCAI
TRAIL Test Site

Dashboard **About** Applications Program Help Logout

HELLO EXAMPLE PERSON SITE LEVEL.

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.

Incomplete Applications
No Incomplete Applications Found

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 take you to the “About” page, which now includes a space for you to view and download templates (highlighted yellow in the image below), and upload documents (underlined blue in the image below).

NCAI
TRAIL Test Site

Dashboard **About** Applications Program Help Logout

TRAIL TEST SITE [Edit Organization](#)

EIN: D.U.N.S. Number: D.U.N.S. Expiration Date:
Location: Mailing Address: Phone:

Contacts

Name	Title	Role	Email	Phone	Site	
Example Person Site Level		Site Coordinator	cclmens@firstpic.org		TRAIL Test Site	Edit

[Add Contact](#)

Youth Name: [Update](#)
No Youth Found

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

[T.R.A.I.L. Implementation Plan](#)

All Required Documents

Name	Due Date	Status	Required	Notes	Edit/Upload View Attachment(s)
2019-2020 Implementation Plan	4/29/2021	Requested	✓		Edit/Upload View Attachment(s)



- When downloading a template, click on the desired document name in the “Templates” section. Once that happens, the template file will download directly to your computer.

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

[T.R.A.I.L. Implementation Plan](#)

All Required Documents

Name	Due Date	Status	Required	Notes	Edit/Upload View Attachment(s)
2019-2020 Implementation Plan	4/29/2021	Requested	✓		

TRAIL_Implementa...xlsx

Show all

- 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. Please note that you will be required to upload all documents as PDFs.

All Required Documents

Name	Due Date	Status	Required	Notes	Edit/Upload View Attachment(s)
2019-2020 Implementation Plan	4/29/2021	Requested	✓		

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

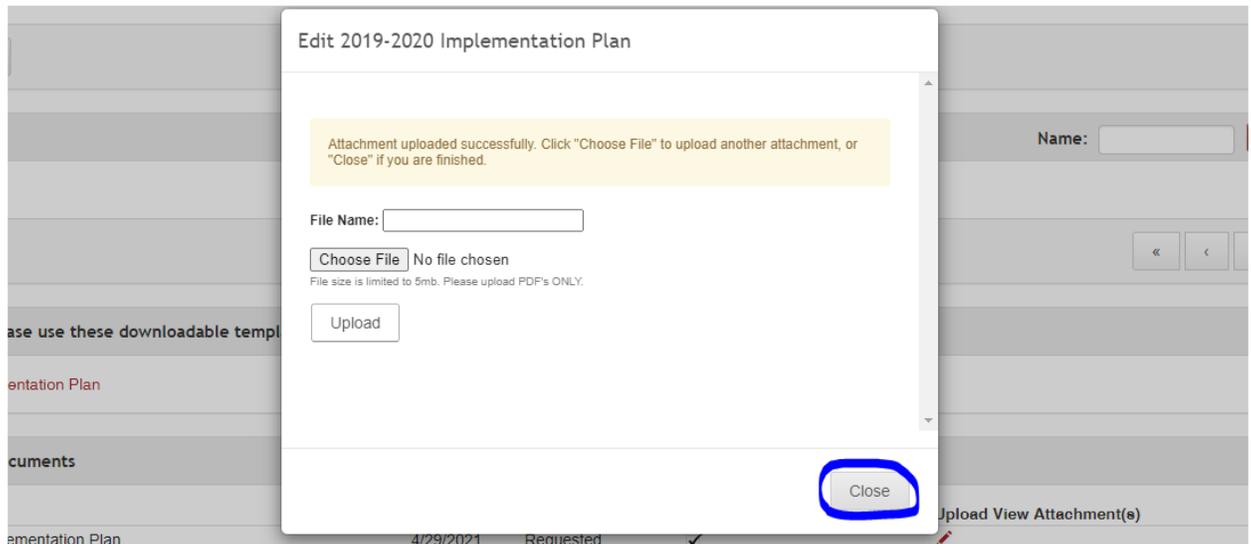
Edit 2019-2020 Implementation Plan

File Name:

No file chosen
File size is limited to 5mb. Please upload PDF's ONLY.



- 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.



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

- 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).



If a document is returned to you, please review any 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)).

10. In the case that one of your documents is past-due, it will 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. You will follow steps 4-7 outlined above to re-upload your documents as needed.