PROPONENT'S GUIDE TO USING THE TRAILMARK MANAGEMENT SYSTEM

Step-by-step instructions for using Katzie First Nation's Trailmark Referrals Management System

WELCOME!

This guide provides proponents with instructions for how to use Trailmark to submit referrals requests, update exiting files, upload supporting information, and maintaining referrals records throughout the consultation and engagement process. The guide includes information on:

- Acquiring an account
- Logging into Trailmark
- Starting, saving, and submitting your referral request
- Managing an existing referrals file
- Troubleshooting account and data issues

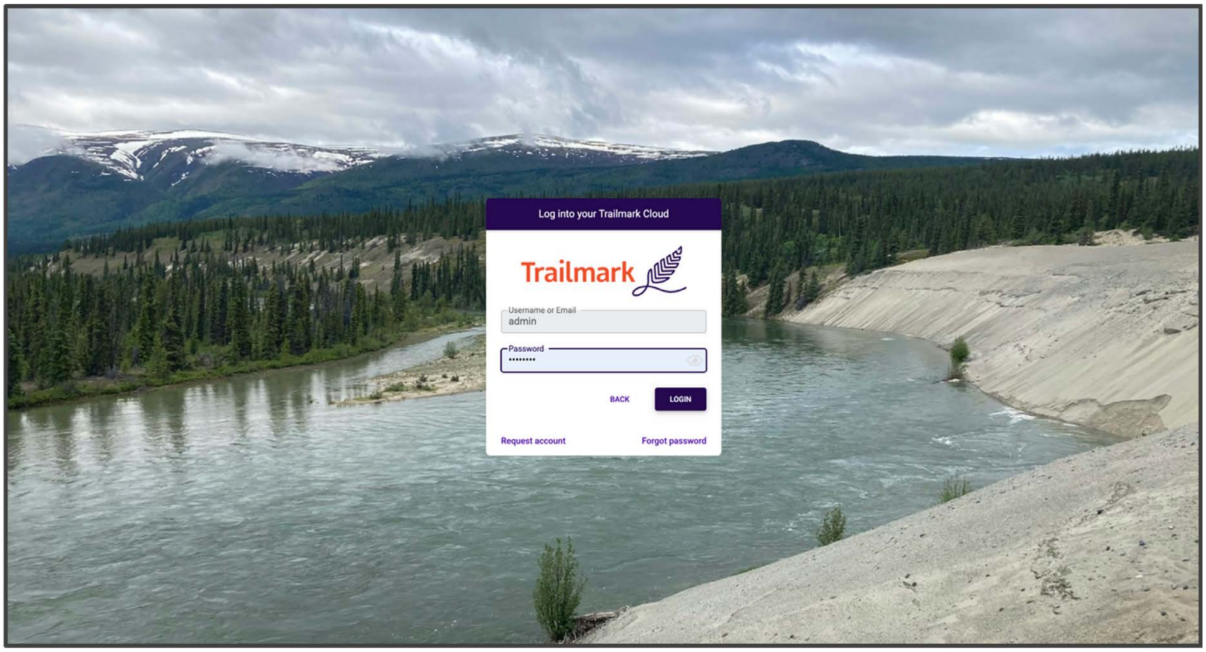
A referral begins when a Proponent submits a completed Referral Intake Form. Katzie uses this information to screen the referral request, confirm whether more information is needed, and determine the appropriate consultation pathway.

Before You Login

1. Go to Trailmark and click on Request Account or contact
    - Proponents who do not yet have a Trailmark account must request one before submitting a referral request.
2. You will receive an email from **Trailmark Cloud Support** (**support@trailmark.cloud**) with a link to the database, along with instructions to activate your account and set your password.
    - If you can’t find the email, check your spam. If you still can’t find it, email **support@trailmark.cloud**.

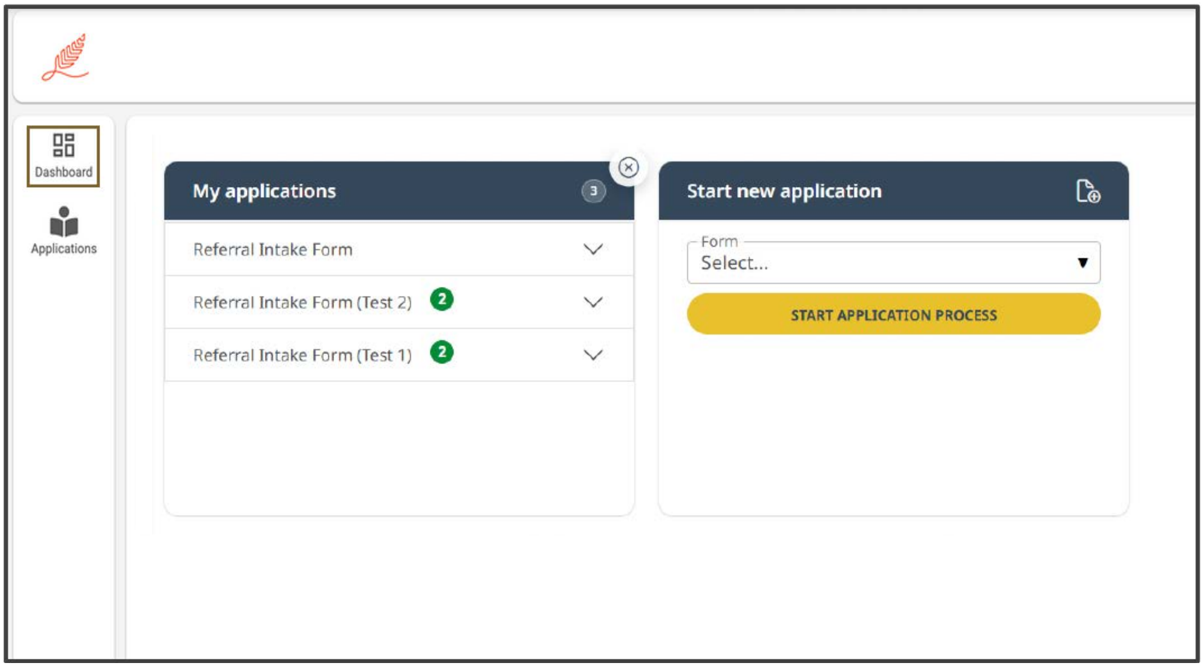
Once you have your login details, you will be able to log in.

LOGIN



1. Go to the login page found in your email.
2. Enter your **username** from the email.
3. Click **Next**.
4. Enter your **password** from the email.
5. Click **Login**.
6. If prompted, choose a new password.

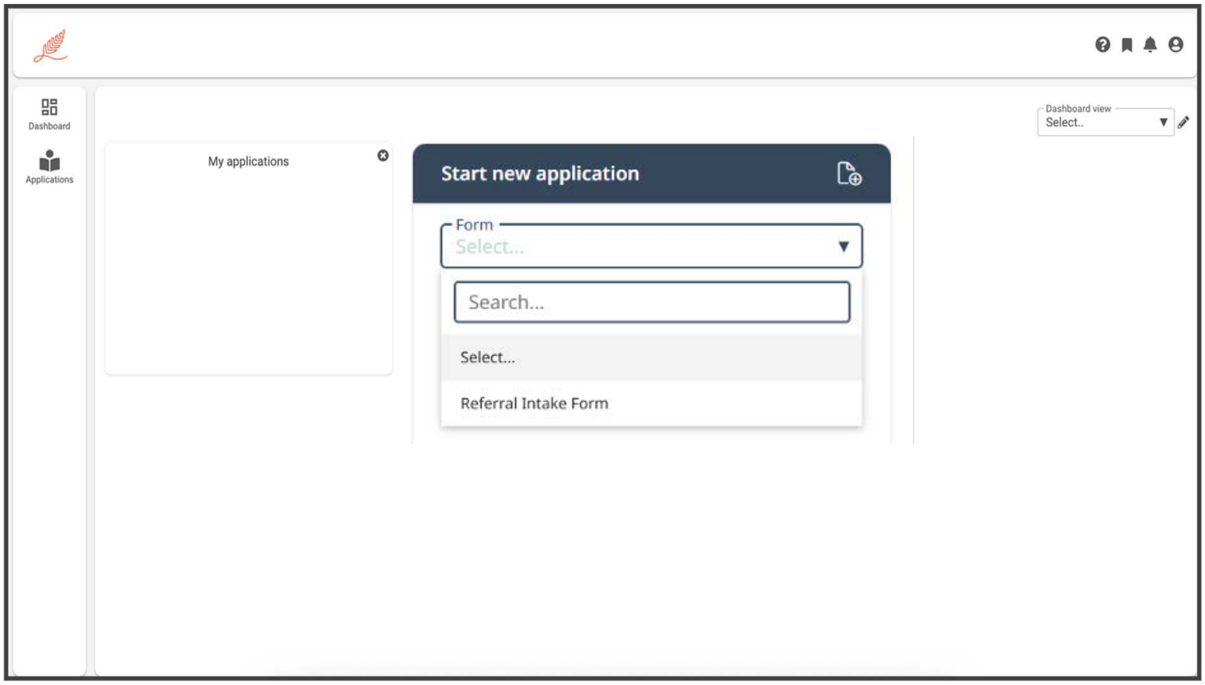
DASHBOARD



- When you log in, you will be taken to your **Dashboard**.
- The Dashboard is customizable, but by default it displays two main options:
  - **Start a New Application (i.e., referral request)** – Begin a new Referral Intake Form.
  - **See your Applications (i.e., referral requests)** – View, edit, or check the status of your existing referral requests.

CREATE A NEW REFERRAL REQUEST (START A NEW APPLICATION):

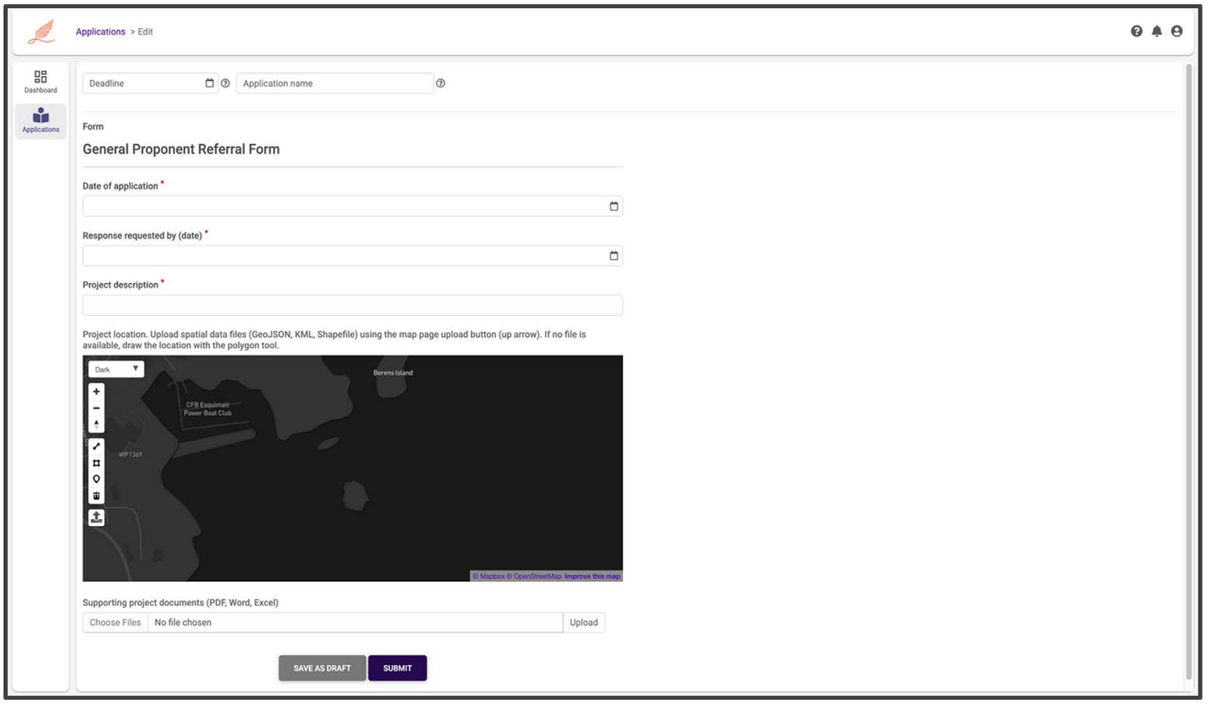
Select Form & Start



1. In your **Dashboard**, go to the **Start New Application** widget and select the **Referrals Intake Form** drop-down menu.
2. Once the form is selected, click **Start Application Process**. In this guide, Trailmark's "application" wording means the Referral Intake Form used to start a referral request.
3. When prompted, click **Yes** to proceed.

CREATE A NEW REFERRAL REQUEST:

Complete the Form

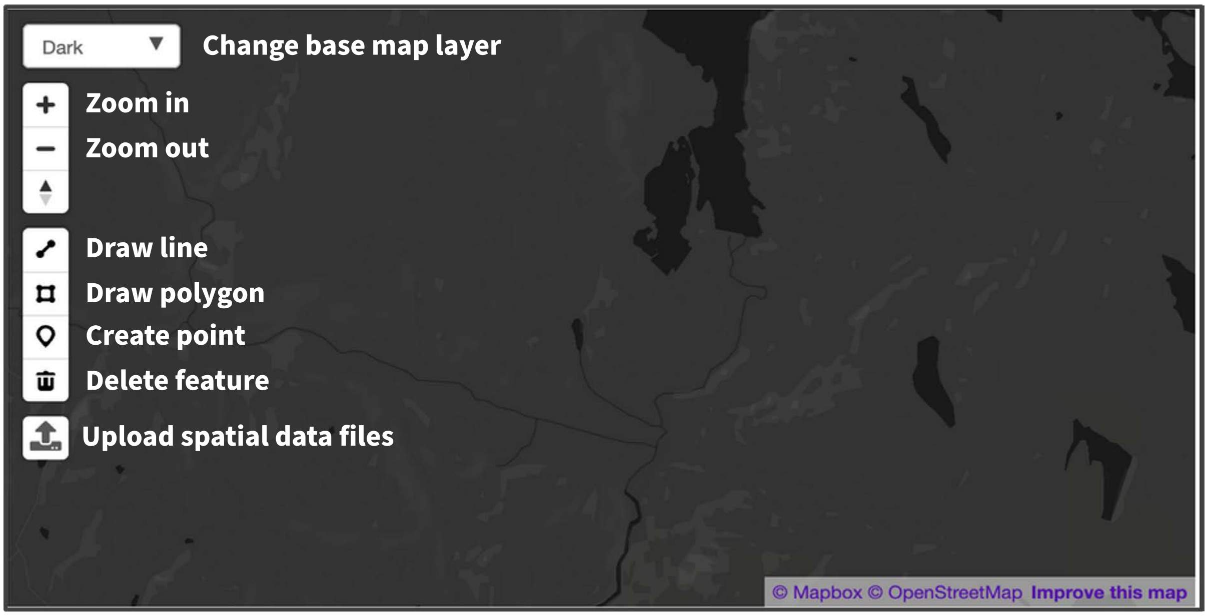


**This is an example form. Fields may vary depending on your referral request.*

1. Fill out all fields, as appropriate. Fields marked with an **asterisk (*) are required**.
2. If unsure about a field, refer to the guidance provided (move your cursor over ? icon).
3. Be prepared to provide the activity purpose, location, scope, timelines, regulatory information, anticipated studies, potential impacts or benefits, applicant and proponent contact information, and supporting documents.
   - You can contact **Referrals@katzie.ca** if you are still uncertain.
4. You can either s**ave as draft** and submit later or **submit now** when the Referral Intake Form is complete.

CREATE A NEW REFERRAL REQUEST:

Map Tools

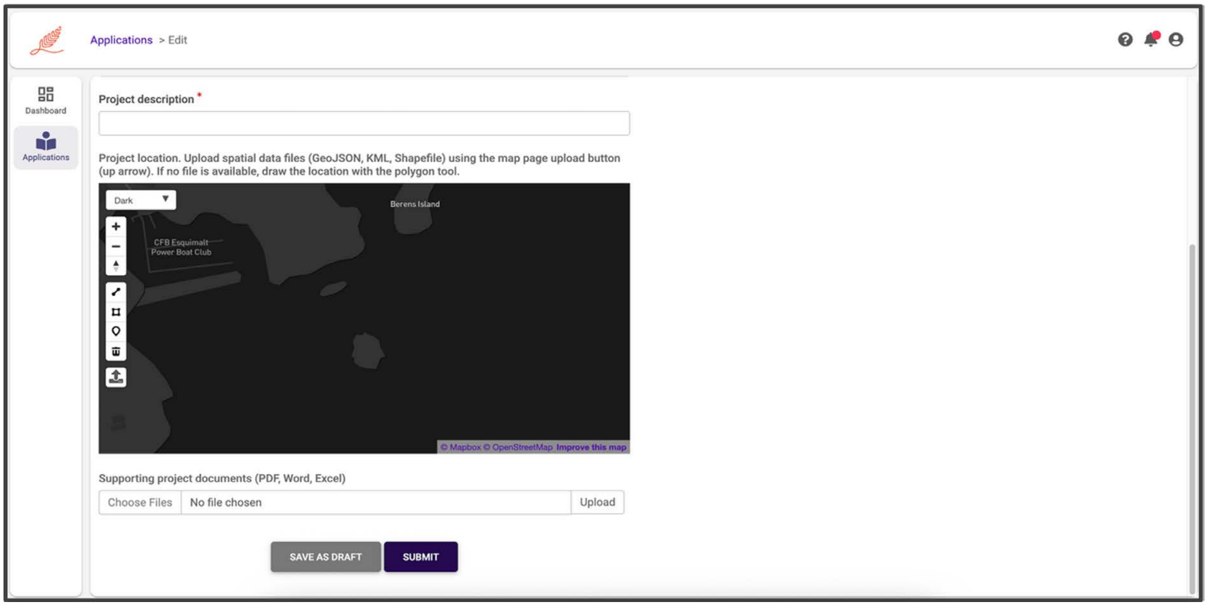


**This is an example form. Fields may vary depending on your referral request.*

- Supported file types for upload: **GeoJSON (preferred), zipped SHP, or KML**.
- Provide the most accurate activity location or spatial footprint available. If the location, scope, timing, methods, or nature of the activity changes after submission, Katzie must be notified.
- **To create a line or a polygon:**
  - Click the **Line** or **Polygon** button, then click anywhere on the map to start adding points. Keep adding points as needed. **Double-click** or **Shift-click** the last point to complete the feature.
- To delete a feature: **Click on the feature first**, then click **Delete** icon button.

CREATE A NEW REFERRAL REQUEST:

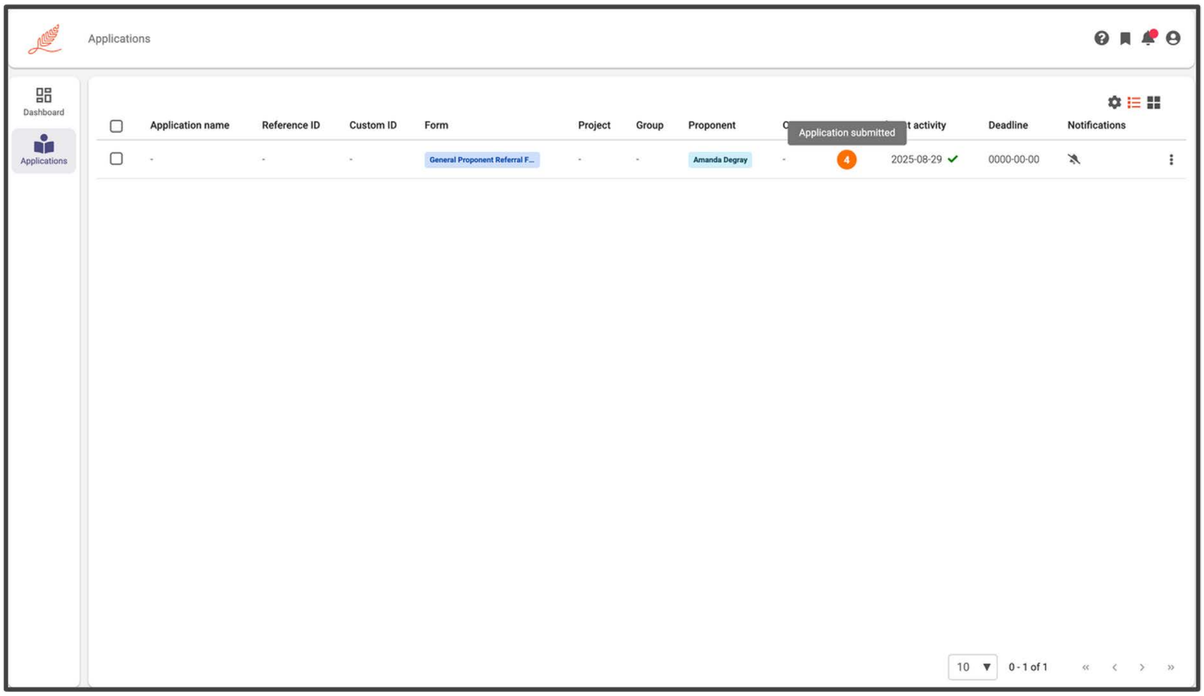
Uploading Files



**This is an example form. Fields may vary depending on your referral request.*

1. Click **Choose Files** to select a file from your computer.
2. **Filenames** can be a maximum of **100 characters** and cannot contain special characters.
3. Supported file types: **PDF**, **Word**, and **Excel**.
4. Upload all available supporting documents needed for Katzie's initial review, such as a project description, maps, site plans, regulatory materials, technical studies, archaeological information, environmental reports, or other relevant documents.
5. Click **Upload** to add your file to the referral request.
6. You may upload more than one file if required.

CREATE A NEW REFERRAL REQUEST:
Submission

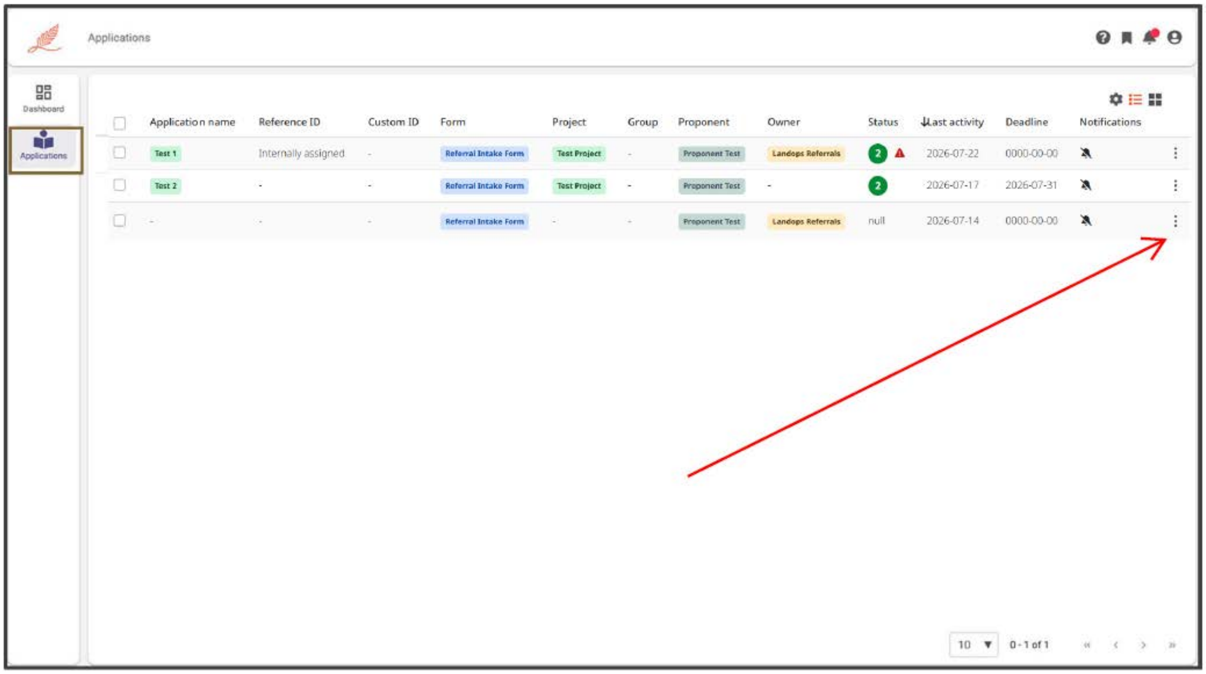


- Once submitted, you will receive an **email notification** confirming your submission.
- Katzie will review the Referral Intake Form to confirm whether sufficient information has been provided. Katzie may request additional information before assigning the referral to a basket (consultation pathway) – refer to *Katzie's Referrals, Consultation & Engagement Policy*, **available on Katzie's website**, for more information on this process.
- Once the referral is complete, Katzie requires a minimum of 10 business days to complete screening and provide an initial response. Timelines may vary depending on referral volume, complexity, staff capacity, or the need for additional review.
- Submission of a referral request does not mean approval, consent, or completion of consultation.

WHAT HAPPENS AFTER SUBMISSION

- After submission, Katzie will process the referral in accordance with K*atzie's Referrals Consultation and Engagement Policy* (**available on Katzie's website**) and supporting procedures.
- The policy and procedures set out how referrals are screened, how basket assignments are made, and when additional information, engagement, capacity funding, technical review, site visits, Guardian monitoring, community engagement, or studies may be required.
- Katzie may contact the proponent if more information is needed before the referral can proceed through the appropriate pathway.
- Guardian monitoring, where required, will be identified by Katzie through the consultation and engagement process and managed through the applicable Guardian Agreement and Guardian Request Form process.

SEE AND MANAGE YOUR APPLICATIONS



- In the **Applications** page, you will see a detailed list of all your referrals requests, including their current status in terms of Katzie's referrals, consultation and engagement process.
- To **view or edit** an application form, click the **three dots (⁝)** on the right-hand side of the row.

Katzie may notify you that more information is needed before the referral can be reviewed and assigned to basket (refer to Katzie's *Referrals, Consultation & Engagement Policy* for more information on this process) and request that the application be resubmitted with more information. This can be done by selecting **Request to Edit**, accessed by clicking on the three dots on the right-hand side of the row.

Proponents can also communicate with Katzie Referrals through Trailmark by selecting **Send Message**, accessed by clicking on the three dots on the right-hand side of the row.

MANAGING AN EXISTING REFERRAL FILE

Trailmark should be used throughout the life of a referral file.

Existing referral files can be accessed through the **Applications page**.

Use Trailmark to:

- Upload revised studies, plans, reports, and supporting documents;
- Respond to Katzie information requests;
- Submit updated mapping and spatial information;
- Notify Katzie of project changes;
- Provide updated schedules, regulatory information, and permit status updates; and
- Maintain an accurate referral record.

Use email (referrals@katzie.ca) for:

- Consultation questions;
- Meeting requests and coordination;
- Capacity funding discussions;
- Draft agreement discussions;
- Accommodation discussions;
- Relationship agreements; and
- General consultation and engagement correspondence.

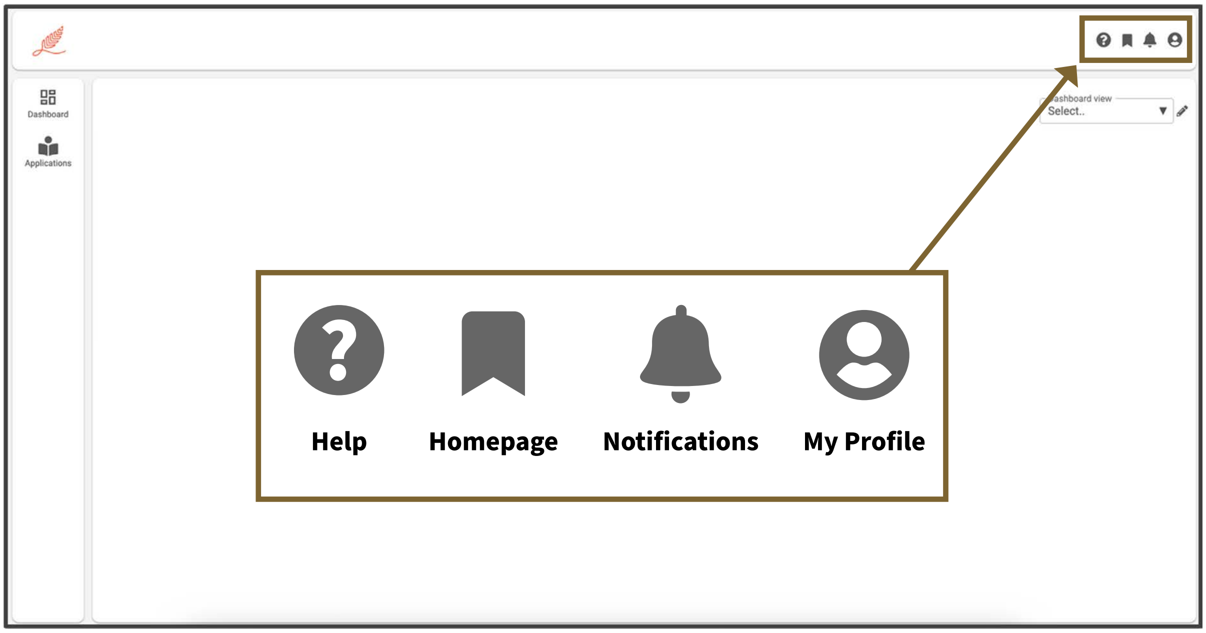
If the project scope, location, timing, methods, authorizations, or other material project information changes, proponents should update the referral file as soon as possible.

Simple Rule
If it is project information, upload it to Trailmark.

If it is a conversation about consultation, engagement, coordination, or relationship-building, use email or schedule a meeting.

Trailmark serves as Katzie's official record for referral information, supporting documents, and project updates. Email and meetings support consultation, engagement, coordination, and relationship-building activities.

USER TOOLS



- **Help:** Training videos, change log (system updates), mobile app link.
- **Homepage:** Customize your default homepage.
- **Notifications:** View alerts and reminders.
- **My profile:** View and update your account details.

THANK YOU!

Thank you for using Katzie First Nation's Trailmark referrals management system to submit your referral requests.

If you need help or have questions, please contact:

Referrals@katzie.ca or **support@trailmark.cloud**