

Introduction

All projects from contract execution through commercial operation must submit quarterly reports through the LSR portal. Reports are due **March 1st, June 1st, September 1st, and December 1st**. The quarterly report consists of an updated project schedule and project narrative, plus attachments where applicable.

Instructions

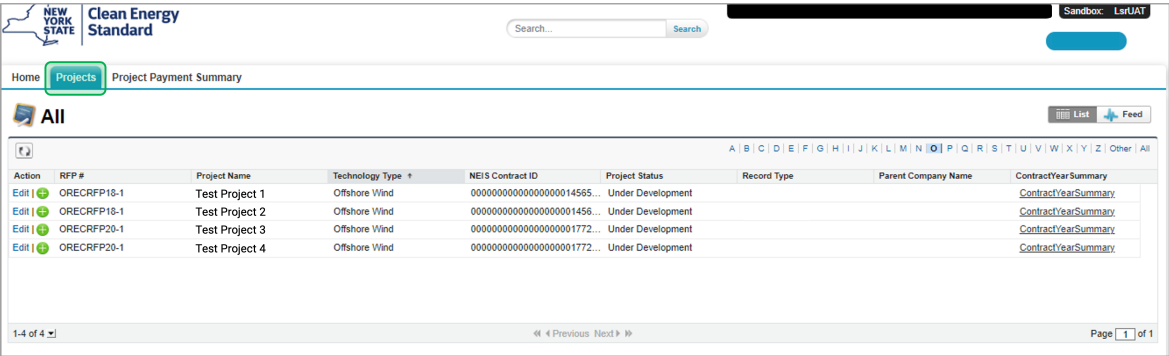
All reports are due each quarter.

Use the table below for a detailed guidance on the functionalities within the Milestones/Deliverables page:

Function	
Collapse All or Expand All	Click on the Collapse All or Expand All button to review the highlevel or detailed information of a milestones /deliverables.
Question Mark Icon	Hover over the Question Mark Icon on the milestone short name will give a full summary of the milestone.
Dropdown Arrow	Click on the Dropdown Arrow to open up the deliverable details.
Pencil Icon	Click on the Pencil Icon on the deliverables to add/update the deliverable.

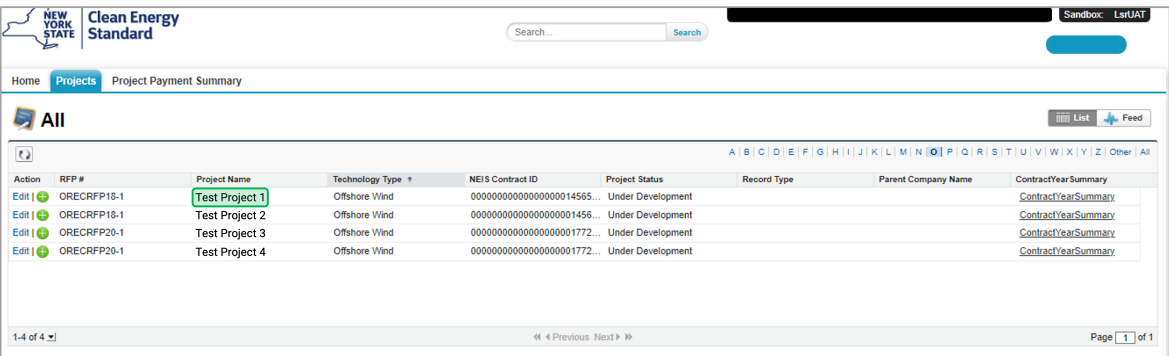
1

Log into the Salesforce Portal and access the **Projects** Tab.



2

Access the Project Record in Salesforce by clicking the link in the **Project Name** column.



In the Project Records page, click on the **Milestones/Deliverables** button to add the milestone details for this quarter.

Project
Test Project 1
[Printable View](#)

Hide Feed

Post
 File
 New Task
 More ▾

+ Follow

Share

Followers

| Show All Updates ▾

There are no updates.

[Project Milestones \[+\]](#)

Project Detail

Edit

Milestones/Deliverables

Project Name	Project Manager Email 📧
RFP # ORECRFP18-1	Project Manager Phone
NEIS Contract ID 📄 000000000000000000145651A	Project Manager Extension
Technology Type	Project Status 📊 Under Development
Developer 👤	Expected Delivery Start Date 📅 1/1/2026

In the Deliverables home page, click on the **Pencil Icon** on the deliverables. A pop-up window will open allowing users to add /update:

- **Percentage Completion**
- **Start Date**
- **End Date**
- **Description**
- **Notes**

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Projects

Project Payment Summary

Test Project 1

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To submit your quarterly progress report, ensure all updates are complete, attachments have been uploaded and select the "Submit Quarterly Progress Report" button. Once submitted, you will no longer be able to make any changes unless NYSERDA requests additional information. Contact the [NYSERDA Offshore Wind team](#) with any questions.

EXPAND ALL

TEST LP		
Development and Construction Planning		

Once the deliverable details are added/updated, click on the **Save** button to add the changes to the deliverables.

Project Milestone Name *

Development and Construction Planning

Start Date *

2/2/2023 [2/13/2023]

End Date *

2/7/2023 [2/13/2023]

Percentage Complete

60

Description

B I

?

SAVE

CANCEL

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To view previously submitted reports, you can access via the **Projects** Tab under **Documents**.

Project

Project Name

Customize Page | Printable View | Help for this Page ?

Feed

Details

Project Stages [1] | Project Site [0] | Project Documents [54] | Project Benefits [0] | Project Deposits [0] | Project Roles [54] | Project Milestones [54] | Contracts [1] | Project Snapshots [0] | Project Contents [54] | Cumulative Forecast Payments [54] | Open Activities [0] | Activity History [4] | Notes & Attachments [54] | Project History [1]

Project Detail

Edit

Delete

Clone

Milestones/Deliverables

Project Summary

Project Name

Project Name

Counterparty

NYGATS ID

Project Manager Email

Project Status

Under Development

Developer

Technology Type

Offshore Wind

Expected Delivery Start Date

1/1/2028

Cumulative Forecast Payment Amount

NEIS Contract ID

Forecasted Date

NYISO Zone

J

RFP #

ORECRFP20-1

Document Approval/Rejection

Edit

Request for Information

Save Document

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Back on the Deliverables home page, click on the **Drop Down** arrow to open up the deliverable details. Then, click on **Manage Deliverables** to add documents to the deliverable.

For Purchases, Delivery and Installation of any Major Services and Equipment deliverables, NYSERDA has provided a [DAC Benefits template](#).

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[EXPAND ALL](#)

TEST LP												
Development and Construction Planning	^											
<h4>Deliverables</h4> <table border="1"> <thead> <tr> <th>DELIVERABLE NAME</th> <th>DOCUMENT</th> </tr> </thead> <tbody> <tr> <td>Appendix A.1 Updated project schedule</td> <td>OSW Deliverables.docx</td> </tr> <tr> <td>Appendix A.2 Updated financing plan</td> <td>For UAT testing1.docx</td> </tr> <tr> <td>Appendix A.3 Updated hiring summary schedule including New York State hiring</td> <td>Insert Project Deliverables in PROD Test.csv</td> </tr> <tr> <td>Appendix A.4 Updated Site Layout Plan including links to associated ShapeFiles</td> <td>OSW Deliverables.docx</td> </tr> </tbody> </table> <p>MANAGE DELIVERABLES</p>			DELIVERABLE NAME	DOCUMENT	Appendix A.1 Updated project schedule	OSW Deliverables.docx	Appendix A.2 Updated financing plan	For UAT testing1.docx	Appendix A.3 Updated hiring summary schedule including New York State hiring	Insert Project Deliverables in PROD Test.csv	Appendix A.4 Updated Site Layout Plan including links to associated ShapeFiles	OSW Deliverables.docx
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Environmental Permits and Local Approvals	v											
Interconnection Process	v											

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On the Manage Deliverables page, click on the **Choose File** button to select the file for upload. Then, click the **Upload** button to finish uploading the file.

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Development and Construction Planning - Deliverables (Documents)

DELIVERABLE NAME	DOCUMENT	ADD / UPDATE DOCUMENT
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Next, click on the **Previous** button to exit out of page and return to the Deliverables home page

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PREVIOUS
UPLOAD

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Once all the Milestones are updated and the progress report is ready for submission, you must acknowledge by checking the **Check Box** and click on the **Submit Quarterly Progress Report** button at the bottom of the page.

Once you submit the Quarterly Progress Report,, the details cannot be modified unless a program staff or project manager unlocks the record.

Financial Support for Monitoring Fisheries and Wildlife ⓘ

Prevailing Wage and Project Labor Agreement ⓘ

Estimated Date for Commercial Operation ⓘ

☐ I agree the information provided is accurate and understand that once the quarterly progress report has been submitted, I am unable to make changes unless NYSERDA requests additional information. In the case of an error or omission, please submit the issue to your project manager.

SUBMIT QUARTERLY PROGRESS REPORT

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The Deliverables home page will refresh and the language on the top indicates that the progress report been submitted for the quarter. If you want to unlock the record, please click on the **URL** in the line which will allow you to send an email to the NYSERDA Staff to unlock the record.

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Your Quarterly Progress Report has been submitted. Please contact the NYSERDA Offshore Wind team in the case of an error or omission.