

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.

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

The screenshot shows the Salesforce portal interface for the 'Clean Energy Standard' project. The 'Projects' tab is selected in the navigation bar. Below the navigation bar, there is a search bar and a 'List' button. The main content area displays a table with the following data:

Action	RFP #	Project Name	Technology Type	NEIS Contract ID	Project Status	Record Type	Parent Company Name	Contract/Year Summary
Edit	ORECRFP18-1	Test Project 1	Offshore Wind	00000000000000000000000014565...	Under Development			Contract/Year Summary
Edit	ORECRFP18-1	Test Project 2	Offshore Wind	0000000000000000000000001456...	Under Development			Contract/Year Summary
Edit	ORECRFP20-1	Test Project 3	Offshore Wind	0000000000000000000000001772...	Under Development			Contract/Year Summary
Edit	ORECRFP20-1	Test Project 4	Offshore Wind	0000000000000000000000001772...	Under Development			Contract/Year Summary

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

The screenshot shows the same Salesforce portal interface as above. In this view, the 'Project Name' column for the first row, 'Test Project 1', is highlighted with a green box, indicating that this is the link to click to access the project record.

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 [List Icons] [Link Icon] [Help Icon]

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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 (5) | Project Benefits (0) | Project Deposits (0) | Project Roles (5) | Project Milestones (5) | Contracts (1) | Project Snapshots (0) | Project Contents (5) | Cumulative Forecast Payments (5) | Open Activities (0) | Activity History (4) | Notes & Attachments (5) | 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

Document Name	Uploaded Doc	Document Type	Approve / Reject	Upload Document	Document History	Notes
Construction Operation Plan	Not Uploaded	Project Application		Choose File No file chosen		
Post Award Contracting Form	Document Name	Project Application	Submitted		Attachment History	
Progress Reports Submitted	Document Name.pdf	OSW Reports, Submission and Meetings	Submitted	Choose File No file chosen	Attachment History	
Quarterly Progress Report (Exhibit K) - Due 12/1/2022	Document Name.pdf		Submitted	Choose File No file chosen	Attachment History	
Quarterly Progress Report (Exhibit K) - Due 3/1/2023	Document Name.pdf		Submitted	Choose File No file chosen	Attachment History	

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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**.

Home Projects Project Payment Summary

Test Project 1

[← BACK TO PROJECT](#)

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](#)

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

[MANAGE DELIVERABLES](#)

Environmental Permits and Local Approvals

Interconnection Process

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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.

Home Projects Project Payment Summary

Development and Construction Planning - Deliverables (Documents)

DELIVERABLE NAME	DOCUMENT	ADD / UPDATE DOCUMENT
Appendix A.1 Updated project schedule	OSW Deliverables.docx	Choose File No file chosen
Appendix A.2 Updated financing plan	For UAT testing1.docx	Choose File No file chosen
Appendix A.3 Updated hiring summary schedule including New York State hiring	Insert Project Deliverables in PROD Test.csv	Choose File No file chosen
Appendix A.4 Updated Site Layout Plan including links to associated ShapeFiles	OSW Deliverables.docx	Choose File No file chosen

[PREVIOUS](#) [UPLOAD](#)

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Next, click on the **Previous** button to exit out of page and return to the Deliverables home page

Home Projects Project Payment Summary

Development and Construction Planning - Deliverables (Documents)

DELIVERABLE NAME	DOCUMENT	ADD / UPDATE DOCUMENT
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Appendix A.4 Updated Site Layout Plan including links to associated ShapeFiles	OSW Deliverables.docx	Choose File No file chosen

[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.

Home Projects Project Payment Summary

Test Project 1

[BACK TO PROJECT](#)

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