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 deta	iled 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.					

Log into the Salesforce Portal and access the Projects Tab.

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

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Edit 🜐	ORECRFP20-1	Test Project 3	Offshore Wind	000000000000000000000000000000000000000	Under Development			ContractYearSummary
Edit 🜐	ORECRFP20-1	Test Project 4	Offshore Wind	000000000000000000000000000000000000000	Under Development			ContractYearSummary
1-4 of 4 💻	1			I Previous N	ext ⊧ I≽			Page 1 of 1

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
Write something	Share	Followers
Q Show All Updates *		No followers.
There are no updates.		
	Project Milestor	ies (5+)
Project Detail Edit Milestones/Deliver	rables	
Project Name		Project Manager Email 🥝
RFP # ORECRFP18-1		Project Manager Phone
NEIS Contract ID 🥝 0000000000000000145651A		Project Manager Extension
Technology Type		Project Status 🥝 Under Development
Developer 🥝		Expected Delivery Start Date 🥥 1/1/2026

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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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T	est Project 1		
в	ACK TO PROJECT		
	To submit your quarterly progress report, ensure all updates are complete, attachments have been uploaded and select the "Submit Qu Report" button. Once submitted, you will no longer be able to make any changes unless NYSERDA requests additional information. Con NYSERDA Offshore Wind team with any questions.	arterly Progr tact the	ress
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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] [2/13/2023]
Percentage Complete	60			
Description				
B I	:::::::::::::::::::::::::::::::::::::::]		
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To view previously submitted reports, you can access via the **Projects** Tab under **Documents**.

Project Name			Customiz	e Page Printable View Help for this Page 🎈
Feed Details				
Project Stages [1] Project Site [0]	Project Documents [5+] Project Bene Cumulative Forecast Payments	fits (0) Project.Deposits (0) Project.Roles (5±) Project.Miles 5±) Open.Activities (0) Activity.History (4) Notes & Attachme	ones (5±) Contracts (1) Project Snapshots (0) ints (5±) Project History (1)	Project Contents [5+]
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 Deli	very Start Date 🕗 1/1/2028	
Cumulative Forecast Payment Amount		N	EIS Contract ID 🕗	
Porecasted Date	ORECREP20 1		NTISO Zone 👩 J	
Document Approval/Rejection				
Document Approval/Rejection	Uploaded Doc	Edit Request for Information Save Docume Document Type Approve / Reject	nt Upload Document	Document History Notes
Document Approval/Rejection Document Name Construction Operation Plan	Uploaded Doc Not Uploaded	Edit Request for Information Save Docume Document Type Approve / Reject Project Application	nt Upload Document Choose File No file chosen	Document History Notes
Document Approval/Rejection Document Name Construction Operation Plan Post Award Contracting Form	Uploaded Doc Not Uploaded Document Name	Edit Request for Information Save Docume Document Type Approve / Reject Project Application Submitted	nt Upload Document Choose File No file chosen	Document History Notes
Document Approval/Rejection Document Name Construction Operation Plan Post Award Contracting Form Progress Reports Submitted	Uploaded Doc Not Uploaded Document Name Document Name.pdf	Edit Request for Information Save Docume Document Type Approve / Reject Project Application Submitted OSW Reports, Submission and Meetings Submitted	Int Upload Document Choose File No file chosen Choose File No file chosen	Document History Notes Attachment History Attachment History
Document Approval/Rejection Document Name Construction Operation Plan Post Award Contracting Form Progress Reports Submitted Quarterly Progress Report (Exhibit K) - Due 12/1/2022	Upleaded Doc Not Upleaded Document Name Document Name.pdf	Edit Request for Information Save Docume Document Type Approve / Reject Project Application Submitted OSW Reports, Submission and Meetings Submitted	nt Upload Document Choose File No file chosen	Document History Notes Attachment History Attachment History Attachment History Attachment History



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.

est Project 1		
BACK TO PROJECT		
To submit your quarterly progress report, ensure all updates are complete, attack Report" button. Once submitted, you will no longer be able to make any changes NYSERDA Offshore Wind team with any questions.	nments have been uploaded and select the "Submit Quarterly Progress s unless NYSERDA requests additional information. Contact the	5
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Development and Construction Planning ③ Deliverables	 ✓ ^ 	
Development and Construction Planning ③ Deliverables Deliverable NAME	DOCUMENT	
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Pevelopment and Construction Planning Peliverables Deliverables DeLiverable NAME Appendix A1 Updated financing plan Appendix A3 Updated hiring summary schedule including New York State hiring	DOCUMENT OSW Deliverables.docx For UAT testing1.docx Insert Project Deliverables in PROD Test.csv	
Deliverables Deliverables Deliverables Deliverables Appendix A1 Updated project schedule Appendix A2 Updated financing plan Appendix A3 Updated hiring summary schedule including New York State hiring Appendix A4 Updated Site Layout Plan including links to associated ShapeFiles	Document OSW Deliverables.docx For UAT testing1.docx Insert Project Deliverables in PROD Test.csv OSW Deliverables.docx	
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EST LP Development and Construction Planning ③ Deliverables Delivera		

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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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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

DELIVERABLE NAME	DOCUMENT	ADD / UPDATE DOCUMENT
Appendix A1 Updated project schedule	🗃 . 🥝 OSW Deliverables.docx	Choose File No file chose
✓ Appendix A 2 Updated financing plan	🗃 - 🥝 For UAT testing1.docx	Choose File No file chose
✓ Appendix A.3 Updated hiring summary schedule including New York State hiring	🗊 . 🥝 Insert Project Deliverables in PROD Test.csv	Choose File No file chose
✓ Appendix A 4 Updated Site Layout Plan including links to associated ShapeFiles	តា - 🥙 OSW Deliverables.docx	Choose File No file chose

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 ③	~	ø	
	Prevailing Wage and Project Labor Agreement ③	~	ø	
	Estimated Date for Commercial Operation ③	~	ø	
(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 an error or omission, please submit the issue to your project manager.	information. In the ca	ase of	
	SUBMIT QUARTER	RLY PROGRESS REPOR	Ţ	

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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.