

## 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.

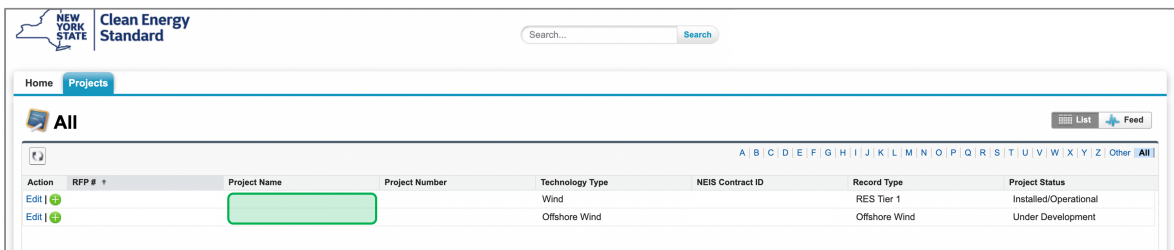
1

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



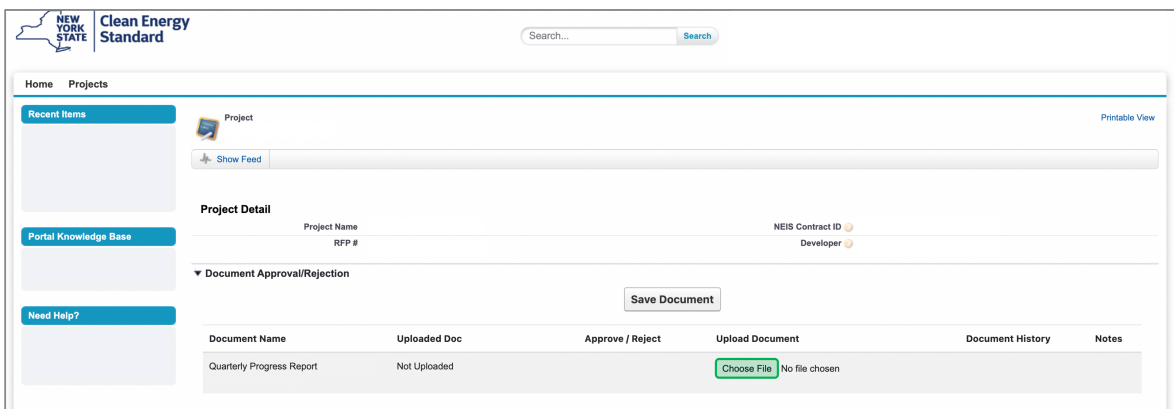
2

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



3

In the **Project Details** page, scroll down to the **Document Approval/Rejection** section and click the **Choose File** button to upload your **Progress Report**.



Continue to do this for each required attachments. Please use naming convention to match section. You can upload as many attachments as needed.

4

To view what you have uploaded, click on **Attachment History**. Once all attachments are added, click the **Save Document** button to save.

The screenshot shows the 'Clean Energy Standard' web application. The header includes the New York State logo and a search bar. The main navigation bar has 'Home' and 'Projects' tabs. On the left, there are three sidebar links: 'Recent Items', 'Portal Knowledge Base', and 'Need Help?'. The main content area is titled 'Project' and includes a 'Printable View' link. Below this is a 'Project Detail' section with fields for 'Project Name', 'RFP #', 'NEIS Contract ID', and 'Developer'. A 'Document Approval/Rejection' section is expanded, showing a table with columns: 'Document Name', 'Uploaded Doc', 'Approve / Reject', 'Upload Document', 'Document History', and 'Notes'. The table contains one row for 'Quarterly Progress Report' with 'Not Uploaded' in the 'Uploaded Doc' column. A 'Choose File' button is next to 'No file chosen' in the 'Upload Document' column. A green 'Save Document' button is positioned above the table.

Document Name	Uploaded Doc	Approve / Reject	Upload Document	Document History	Notes
Quarterly Progress Report	Not Uploaded		<input type="button" value="Choose File"/> No file chosen		