

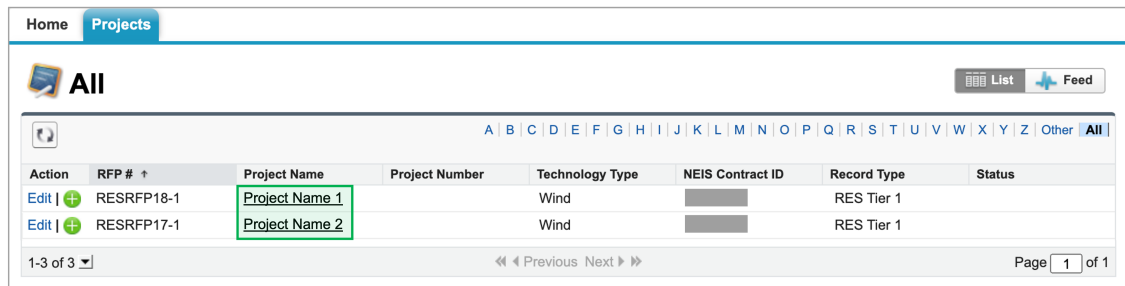
Introduction

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

Updating the Project Schedule

1

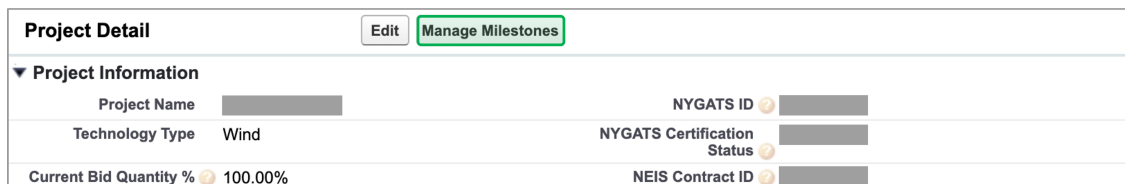
Log into the Salesforce Portal and access the **Projects Tab**. Access the **Project Record** in Salesforce by clicking the link in the **Project Name** column.



| Action | RFP # ↑ | Project Name | Project Number | Technology Type | NEIS Contract ID | Record Type | Status |
|----------|------------|----------------|----------------|-----------------|------------------|-------------|--------|
| Edit + | RESRFP18-1 | Project Name 1 | | Wind | | RES Tier 1 | |
| Edit + | RESRFP17-1 | Project Name 2 | | Wind | | RES Tier 1 | |

2

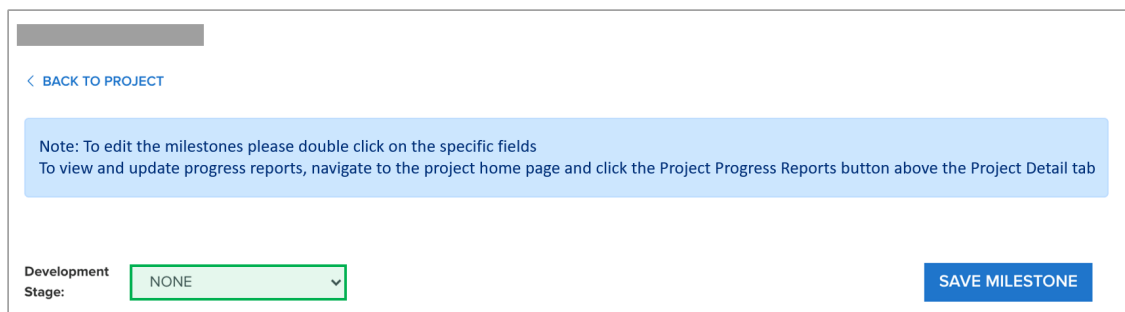
From within the Project Record, click the **Manage Milestones** button above the **Project Details** section.



| Project Detail | | Edit | Manage Milestones |
|------------------------|---------|-----------------------------|-------------------|
| ▼ Project Information | | | |
| Project Name | | NYGATS ID | |
| Technology Type | Wind | NYGATS Certification Status | |
| Current Bid Quantity % | 100.00% | NEIS Contract ID | |

3

Review each numbered **Milestone** (1-41). You can filter the milestones using the **Development Stage** drop-down or view all milestones by leaving this drop-down on **None**.



< BACK TO PROJECT

Note: To edit the milestones please double click on the specific fields
To view and update progress reports, navigate to the project home page and click the Project Progress Reports button above the Project Detail tab

Development Stage: NONE

SAVE MILESTONE

4

While reviewing each of the 41 **Milestones**, double-click any cell to edit the cell's contents, or click the **Pencil** icon in the **Edit** Column to edit the entire milestone record.



Update the following fields for each milestone as needed:

| Field Name | Requirements |
|---------------------|--|
| Start/End Dates | Input actual or expected dates. Start and End dates can be the same for discrete events. |
| Percentage Complete | Update the progress towards the milestone completion. |
| Status | Provide a brief status description (1-3 sentences). |

[< BACK TO PROJECT](#)

Note: To edit the milestones please double click on the specific fields
To view and update progress reports, navigate to the project home page and click the Project Progress Reports button above the Project Detail tab

Development Stage: NONE SAVE MILESTONE

| Milestones | | | | | | | | |
|------------|--|------------|-----------|---------------------|--|----------------|--------------------------------------|---|
| MILESTONE# | MILESTONE NAME | START DATE | END DATE | PERCENTAGE COMPLETE | STATUS | NYSDA COMMENTS | DEVELOPMENT STAGE | EDIT |
| 1 | Full site control obtained for the Bid Facility (including AC collection system) | 9/30/2018 | 9/30/2018 | 100% | All leases and options to purchase for all parcels with proposed turbines, | | Site Diligence & Project Development |  |
| 2 | Full site control obtained for the Gen-Tie Line and Interconnection Facilities | | 6/20/2018 | 100% | Collection substation & POI located on same parcel. Parcel under option agreement. | | Site Diligence & Project Development |  |

5

When all required changes have been made to all milestones, click the **Save Milestone** button to save your changes.

[< BACK TO PROJECT](#)

Note: To edit the milestones please double click on the specific fields
To view and update progress reports, navigate to the project home page and click the Project Progress Reports button above the Project Detail tab

Development Stage: NONE SAVE MILESTONE

6

Once saved, click the **Back to Project** link to return to the **Project Record**.

< BACK TO PROJECT

Note: To edit the milestones please double click on the specific fields
 To view and update progress reports, navigate to the project home page and click the Project Progress Reports button above the Project Detail tab

Development Stage: NONE

SAVE MILESTONE

Creating the Project Narrative

1

Locate and access the **Project Record** in Salesforce. If you are continuing the steps from the section above, you will already be on the **Project Record**.

2

At the top of the **Project Record**, above the **Project Detail** section, click the **Project Progress Reports** option. This will auto-scroll you down to the **Project Progress Reports** section.

Project Milestones [5+]
Project Progress Reports [5+]

Project Detail

Edit
Manage Milestones

▼ **Project Information**

| | | | |
|------------------------|---|-----------------------------|---|
| Project Name | <div style="background-color: #f0f0f0; height: 15px; width: 100%;"></div> | NYGATS ID | <div style="background-color: #f0f0f0; height: 15px; width: 100%;"></div> |
| Technology Type | Wind | NYGATS Certification Status | <div style="background-color: #f0f0f0; height: 15px; width: 100%;"></div> |
| Current Bid Quantity % | 100.00% | NEIS Contract ID | <div style="background-color: #f0f0f0; height: 15px; width: 100%;"></div> |

3

From the **Project Progress Reports** section, click **Edit** for the latest progress report row. This opens the **Progress Report** edit page.

Project Progress Reports

| Action | Progress Report Name | Progress Report Description | Status | Due Date | Completed By | Completed Date | Requires More Information |
|--|----------------------------|-----------------------------|--------|-----------|--------------|----------------|---------------------------|
| Edit | Progress Report - 3/1/2019 | | Draft | 12/1/2021 | | | <input type="checkbox"/> |

[Show 5 more »](#) | [Go to list \(12\) »](#)

4

In the **Progress Report** edit page, update the following fields

| Field Name | Requirements |
|----------------|---|
| Completed Date | Input the date you completed the progress report. |
| Completed By | Input the individuals name who completed the progress report. |

| | |
|-----------------------------|---|
| Status | <p>Update the status to:</p> <ul style="list-style-type: none"> • Draft: Report is in draft form • Completed: Report is completed, or • Revised: Report has been revised since being completed. <p>A status of Completed indicates to NYSERDA staff that the report is ready to be reviewed.</p> |
| Progress Report Description | Use this section for the narrative about the project. |

Project Progress Report Edit

Save Cancel

Progress Report Detail

= Required Information

Progress Report Name

Progress Report - 3/1/20

Completed Date

[11/16/2021]

Completed By

Requires More Information
☐

Project Name
Bluestone Wind

Status

Draft

Due Date

Progress Report Narrative

Progress Report Description

↩

→

B

I

U

~~S~~

🔗

🖼️

☰

☷

☰

☷

☰

☷

☰

☷

Save Cancel

5

After updating all required fields and inputting the project narrative, click **Save** either at the top or the bottom of the page to save your progress report updates.

Adding Attachments (If Applicable)

1

Upload required attachments to the corresponding document slots as available. Required attachment could include:

- Copies of any permits or approvals granted
- Copies of any correspondence (of any type) denying or refusing any permit or approval
- Prevailing Wage documentation
- Supplemental M/WBE survey (to be updated as project progresses to construction)

