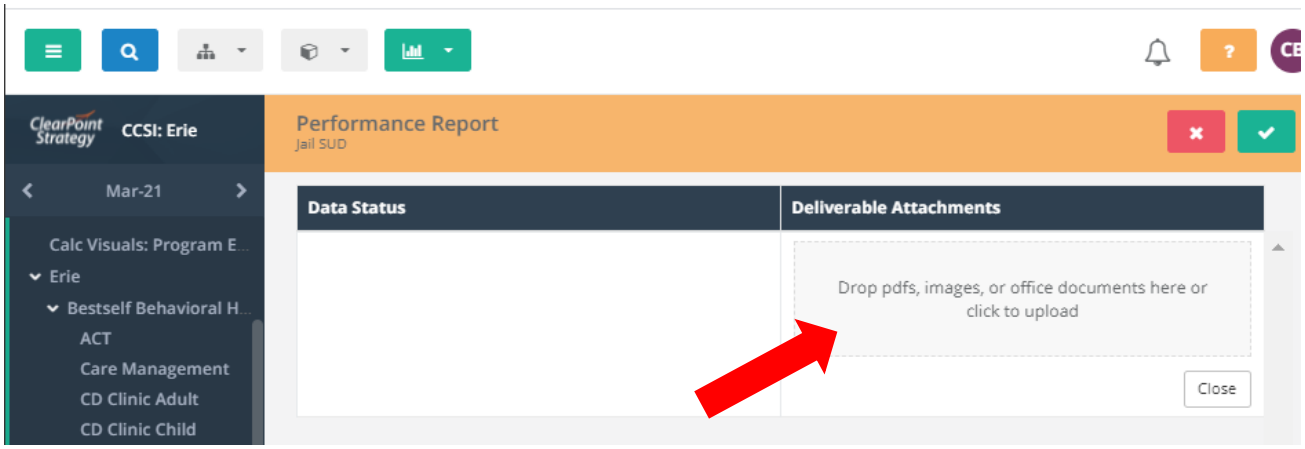
ClearPoint How To: Add Attachments to Upload Only Reports and Set Time Periods

1. Navigate to the Program by using the left-hand navigation menu

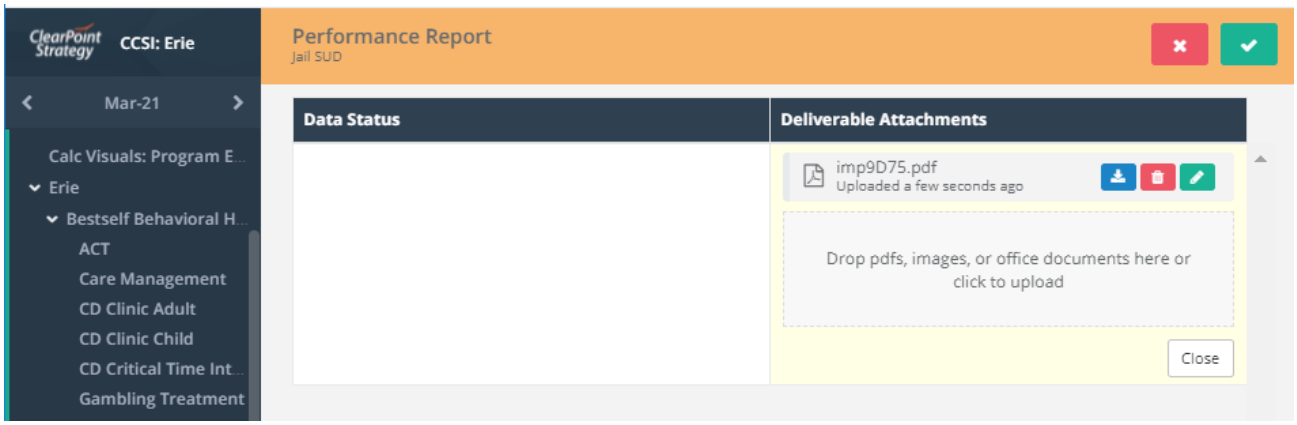
2. Once you are on the Program page click the Performance Report link in the Reports box

3. Once you are on the Performance Report page, double click in the white box below Deliverable Attachments to open the upload functionality



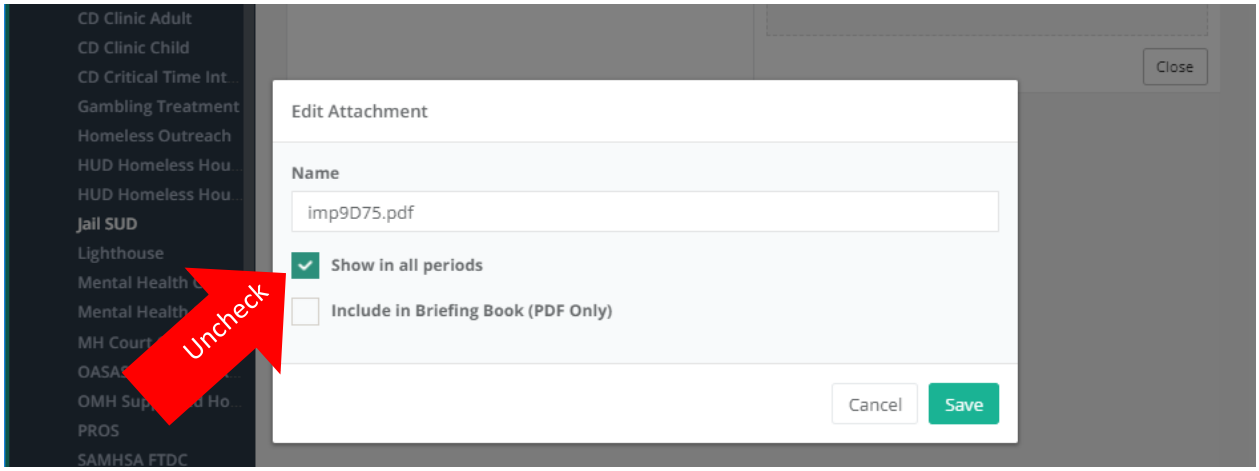
4. Either drag and drop a file into the gray area or click once in the gray area to open your file explorer to choose a file

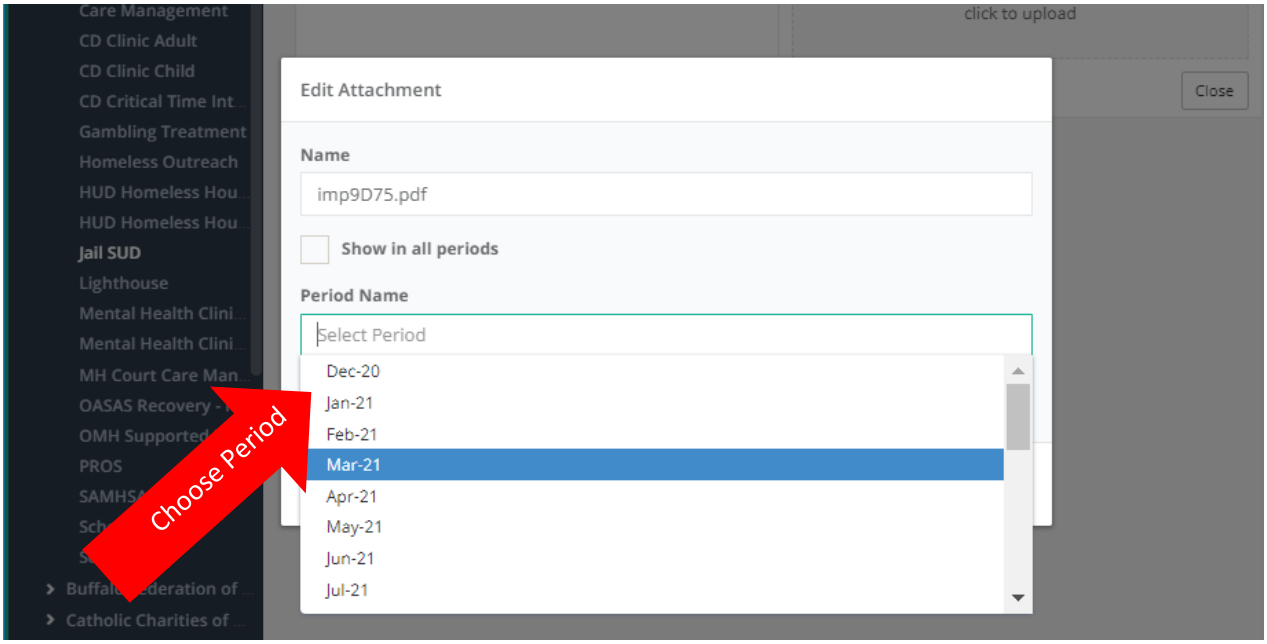
5. If the file was successfully uploaded you will see it under Deliverable Attachments



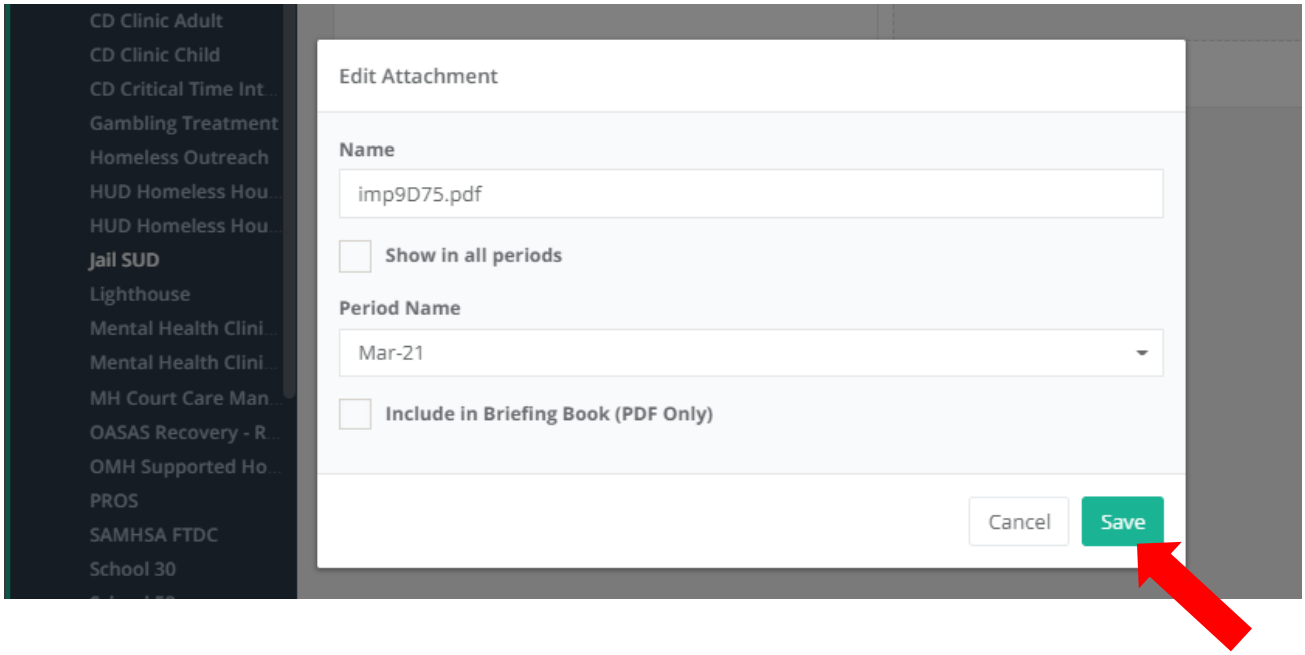
6. To set the time period for the attachment, click on the green pencil icon to the right of the attachment **(If this is an annual upload you can skip this step)**

7. If this is a **quarterly** upload, uncheck the box that says “Show in all periods” and choose the correct month from the Period Name drop down. The Period Name should be the end of whichever quarter you are uploading the document for (i.e. Q2 upload = Jun-2021)

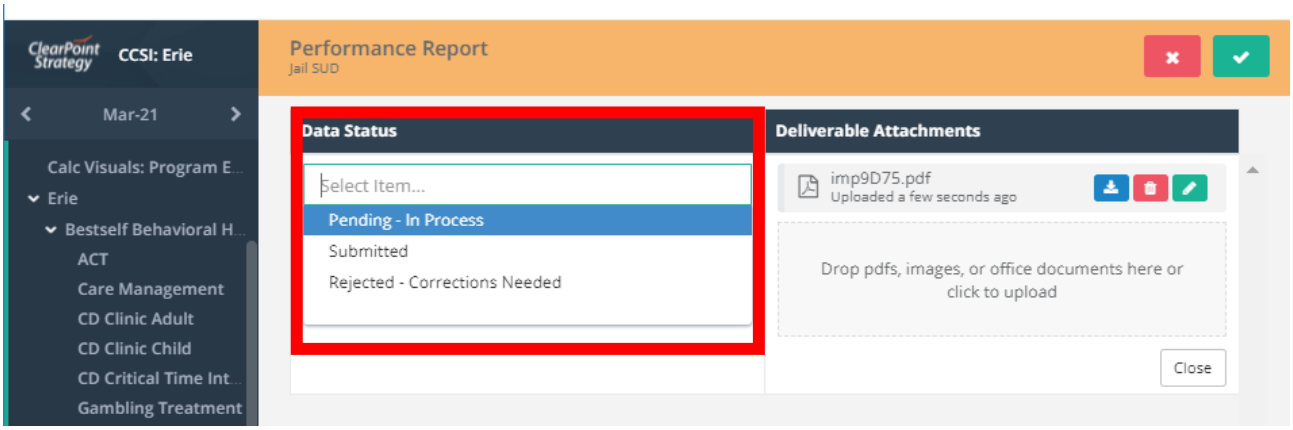
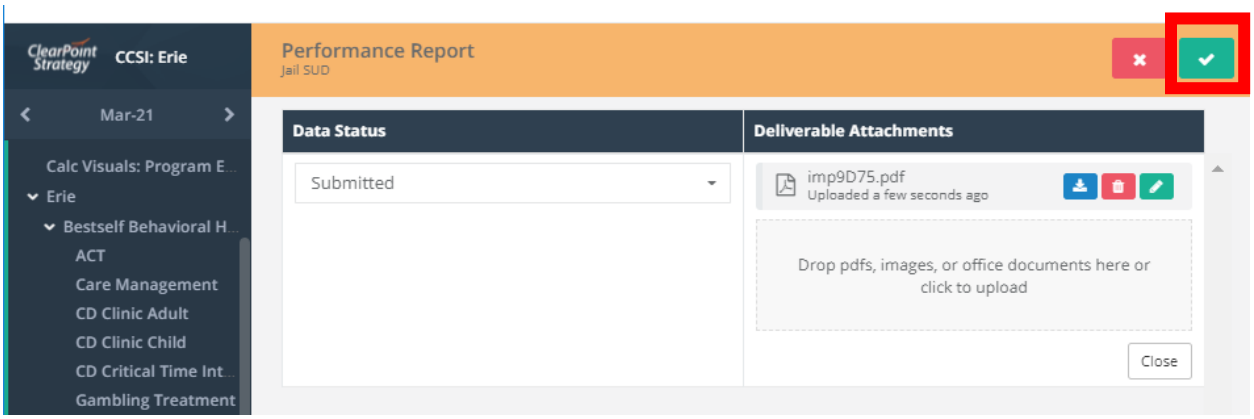




8. Click Save



9. Select your Data Status



10. Click save on the entire report