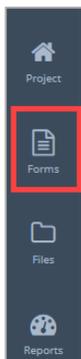# LEED Tracking

This for is utilized by the party responsible for managing and obtaining LEED certification on the project. This form should be maintained with current LEED certification plan information as well as the progress information as applicable. Final LEED certification information should be captured in the form when the certification is obtained. Generally, one LEED Tracking form should be created and maintained for each LEED-eligible project as long as the LEED plan does not change. Tracking information should be captured via editing the existing form. A new LEED Tracking form should be created and maintained if the LEED certification plan changes.

This form utilizes the same information as the USGBC LEED Tracking Form. More information on definitions and explanations of the information required for this form can be obtained by referencing the information provided by USGBC for that form.
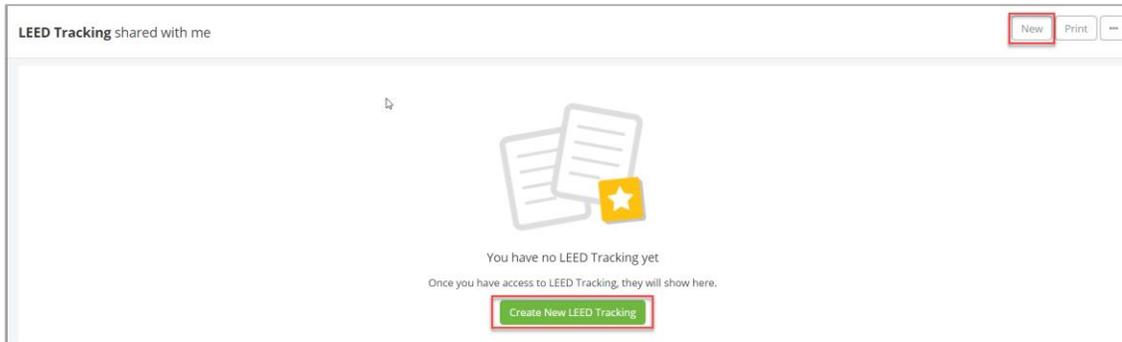
Creating the LEED Tracking

1. Within the project, click the **Forms** icon on the left navigation pane.

2. In the search area of the **Form Types** start to enter Task and then select **LEED**.
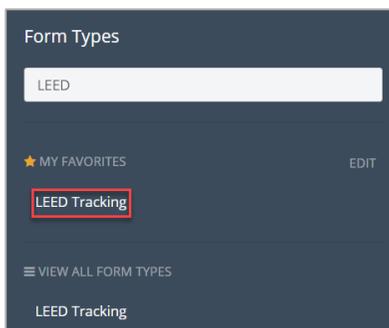
3. Click the **Create New LEED Tracking** button located in the middle of the log or click the **New** button in the upper right corner.
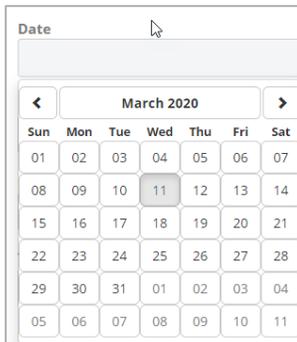
LEED Tracking shared with me   New   Print   ...

You have no LEED Tracking yet

Once you have access to LEED Tracking, they will show here.

Create New LEED Tracking

4. Enter the **Subject**.

Subject   * Required

Type the Subject

5. Enter the name of the **Vendor Company** responsible for LEED planning and tracking.

Vendor Company

6. Select the **Date** the form is created or updated from the Calendar Menu.

Date

<		March 2020				>
Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04
05	06	07	08	09	10	11

7. Click inside the **LEED Version** field and select from the list.

LEED Version

8. Click the **LEED Specialty** and select from the list.

LEED Specialty

9. Click the **Target LEED Certification Level** and select from the list.

Target LEED Certification Level

10. Enter any applicable **Notes**.

Notes

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11. To add **Credit and Points Tracking** information, click the **Create New** button.

Credit and Points Tracking   ⤢ Create New ⋯

#	Category	Credit Description	Possible Points	Required Credit	Strategy For Obtaining Credit	Yes Points	Unknown Points	No Points	Notes

 a. Click the **Category** and select from the list.

Category

 b. Enter a **Credit Description.**

Credit Description

Type the Credit Description

 c. Enter **Possible Points**

Possible Points

 d. If needed, check the box **Required Credit**.

Required Credit

☐ ⬅

    e.   Enter the **Strategy For Obtaining Credit**.

Strategy For Obtaining Credit

Type the Strategy For Obtaining Credit

    f.   Enter **Yes Points**. (+/-)

Yes Points

    g.   Enter **Unknown Points**. (+/-)

Unknown Points

    h.   Enter **No Points**. (+/-)

No Points

    i.   Enter any applicable **Notes**.

Notes

Type the Notes

    j.   Click the **Add & New** to save the record and add another Credit and Point Tracking entry or click **Add** to save the data and return to the Details section.
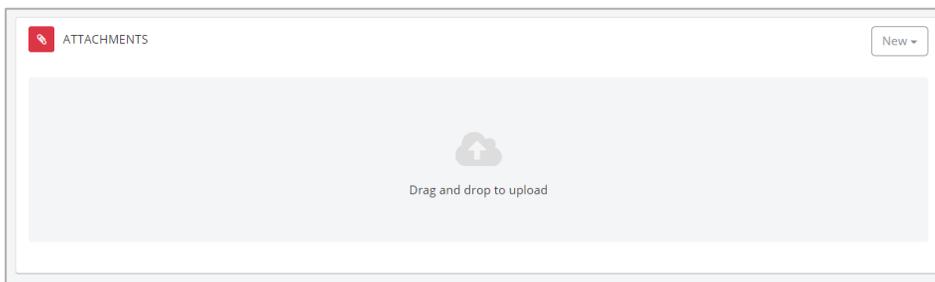
Add & New   Add

12. To complete and save the **LEED Tracking** document, click the dropdown arrow beside **Save & Share** and click the **Save** button to save the record or click the **Save & Share** button and share with any applicable share groups.
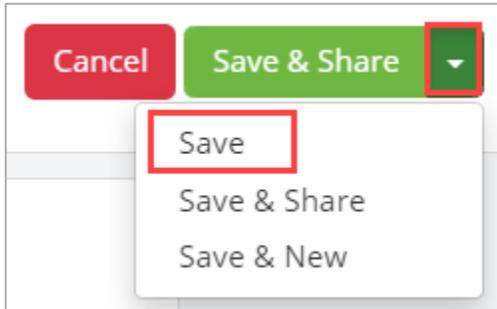
Attach Supporting Documentation

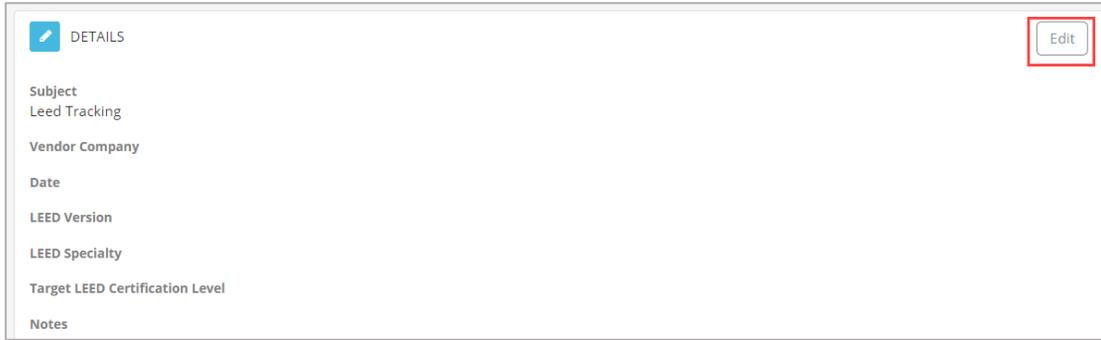1. Drag and drop any supporting files to the **Attachments** section of the record.
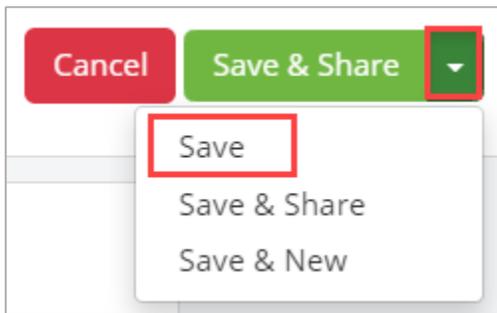
Editing the LEED Tracking form

1. Open the LEED Tracking log and click the title of the record you would like to edit.

2. Click the **Edit** button located in the Details panel.

3. Make the required edits to the applicable fields and click the dropdown arrow beside **Save & Share** and click the **Save** button to save the record or click the **Save & Share** button and share with any applicable share groups.

Recording The Final LEED Certifcation

Note: Make sure to attach copies of the LEED certification documents.

1. Open the LEED Tracking log and click the title of the record you would like to edit.

2. Click the **Edit** button located in the Details panel.

3. Click the **Final LEED Certification Level** and select from the list when LEED certification has been obtained.

4. Select a **LEED Certification Date** from the Calendar Menu when LEED certification has been obtained.

4. Make the required edits to the applicable fields and click the dropdown arrow beside **Save & Share** and click the **Save** button to save the record or click the **Save & Share** button and share with any applicable share groups.