

# How to Create a Work Plan or Change Order

## Creating a Work Plan and Work Plan Task

Once the Site Characterization has been completed, the service provider will need to create a Scope of Work (work plan). The Scope of Work must contain a Disproportionate Cost Analysis (DCA) with at least two alternatives, one of which must be indicated as the “preferred alternative”. Within each DCA, are line item records called Work Plan Tasks.

Work Plan Tasks represent the individual tasks, personnel, and equipment that will be necessary to complete the SOW (aka individual line items). Each DCA within a Work Plan (SOW for example) must have Work Plan Tasks associated with that alternative. The cumulative total cost of all of the Work Plan Tasks in a given DCA represent the cost estimate for that alternative.

Once the SOW has been created, that contains a DCA with at least two alternatives and the various Work Plan Tasks associated with each, the Service Provider then submits the SOW to the insured for their approval. Once the SOW is approved by the insured (or their representative), it is automatically sent to PLIA for review.

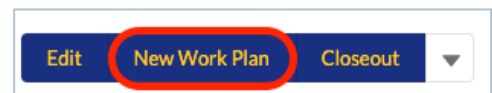
### Steps to create and submit SOW:

- 1. Create new Work Plan (SOW):** On the claim, select “New Work Plan” to create a SOW.
  - a. Create new DCA**
    - i. Under the newly created DCA, create individual Work Plan Tasks.**
    - ii. Ensure that “preferred alternative” box is checked.**
  - b. Create a second DCA (or clone and modify first DCA)**
    - i. Ensure that “preferred alternative” box is not checked.**
- 2. Submit for Approval:** After the DCA and Work Plan Tasks have been entered, submit the Work Plan (SOW) for approval.
- 3. Approval Process:** Once submitted for approval, the Work Plan is automatically submitted to PLIA for review after the insured has approved the Work Plan.
  - a. If the insured doesn’t have access to the Online Community, a paper form must be signed by the insured and submitted to PLIA. Once received, PLIA will approve the Work Plan on behalf of the insured.**
- 4. Post-Review:** The Service Provider is notified via email when the Work Plan has been reviewed and approved/rejected.

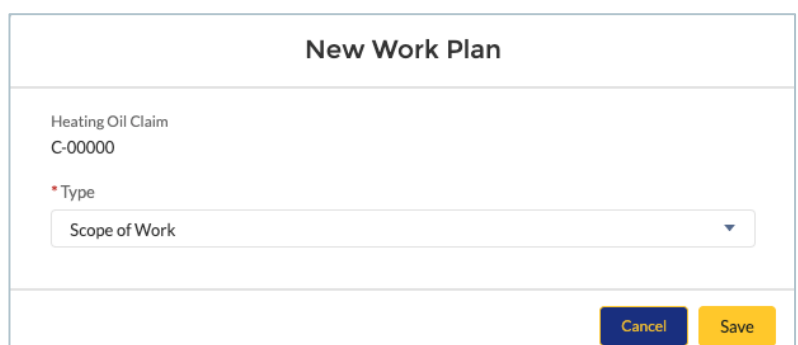
## Walkthrough of Work Plan Process

### Create Scope of Work Plan record

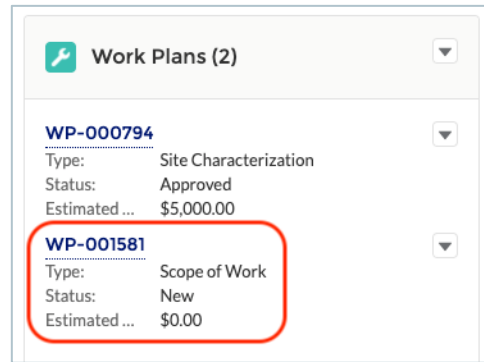
Navigate to the Heating Oil Claim and click New Work Plan.



In the New Work Plan window, click Save.

A screenshot of the 'New Work Plan' form. The title 'New Work Plan' is at the top. Below it, the text 'Heating Oil Claim C-00000' is displayed. There is a field labeled '\* Type' with a dropdown menu showing 'Scope of Work'. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

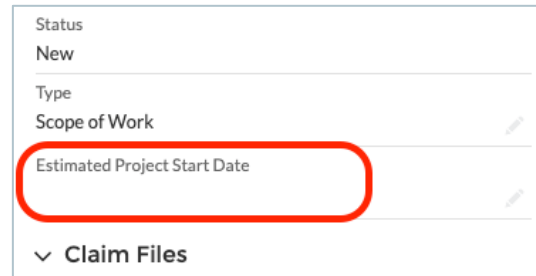
On the Heating Oil Claim, click on your new Work Plan in the Work Plan list.



Work Plans (2)

<b>WP-000794</b>	Type: Site Characterization
	Status: Approved
	Estimated ... \$5,000.00
<b>WP-001581</b>	Type: Scope of Work
	Status: New
	Estimated ... \$0.00

Update the Estimated Project Start Date field.



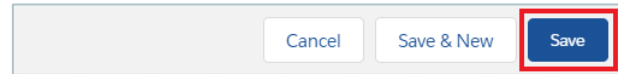
Status  
New

Type  
Scope of Work

Estimated Project Start Date

Claim Files

Click Save.



Cancel Save & New Save

*Note: On the Work Plan, the currency field Estimated Cost Total is calculated automatically from amounts given on Work Plan Task records. PLIA Invoice Total – Submitted are calculated automatically from amounts given on Invoice records. These fields cannot be manually changed on the Work Plan.*

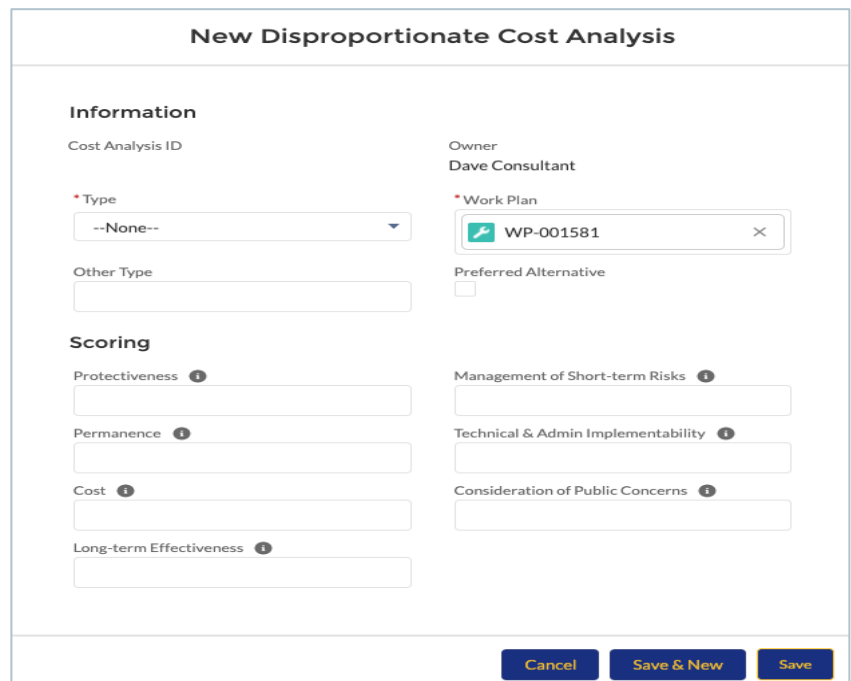
### Create Disproportionate Cost Analysis Records

Disproportionate Cost Analysis (DCA) records outline and score the different solution options. They have line item Work Plan Task records. When a DCA is chosen as the preferred solution, the Work Plan Task records under that DCA roll up to the Work Plan.

To create a DCA record, navigate to the Work Plan and click “New DCA” in the upper right-hand corner. The following dialogue box will appear:

Complete the DCA by rating the selected alternative in each of the seven fields (scoring from 1-36, where 1 is the most and 36 is least desirable).

Click save.



**New Disproportionate Cost Analysis**

**Information**

Cost Analysis ID

Owner  
Dave Consultant

\* Type  
--None--

\* Work Plan  
WP-001581

Other Type

Preferred Alternative

**Scoring**

Protectiveness 1

Management of Short-term Risks 1

Permanence 1

Technical & Admin Implementability 1

Cost 1

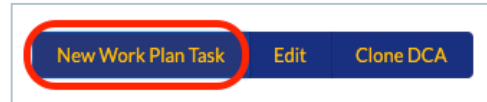
Consideration of Public Concerns 1

Long-term Effectiveness 1

Cancel Save & New Save

### Create Work Plan Task records

From your new Disproportionate Cost Analysis record, click the New Work Plan Task button.



### New Work Plan Task

\*Task  
Field Equipment

\*Subtask  
PID

\*Task Description  
Rented for 3 days

\*Estimated Amount  
\$750

Next

Enter the Estimated Amount, Quantity, Task, and any additional fields that are necessary and click Save.

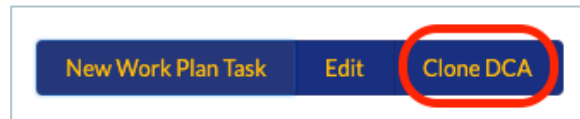
- Your first Work Plan Task has now been created under the DCA.
- Repeat this action for each individual line item that is being proposed in the Scope of Work.

*Note: A list of all Task & Subtasks are identified and described at the bottom of this How-to guide.*

### Clone Disproportionate Cost Analysis Records

Existing Disproportionate Cost Analysis (DCA) records and the Work Plan Tasks under them can be cloned to create a new DCA record with identical Work Plan Tasks. After cloning, the DCA scoring fields will each be set to “36” and can be updated as needed. The cloned Work Plan Tasks can be updated or deleted as needed.

Navigate to the DCA record you want to clone. Click the clone DCA button.



Select a Type. Click Save.

### Clone DCA

\*Type  
Excavation

Next

## Disproportionate Cost Analysis Preferred Alternative

After creating your DCA and Work Plan Task records, you can select your preferred alternative by checking the Preferred Alternative box on that DCA record.



This will update the Work Plan Estimated Amount field. A Preferred Alternative must be selected in order for a Work Plan to be approved.

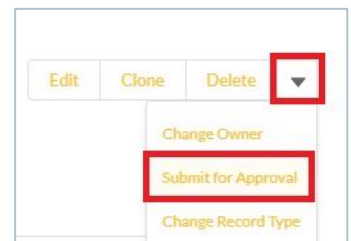
## Scope of Work (Cleanup) Work Plan Approval Process

Work Plan approval is a two-step process. First, the Work Plan is submitted to the insured or designated Approvers for approval. Once approved by the Insured or their Approvers, the Work Plan is automatically submitted to PLIA for review and approval.

### Submit Work Plan for Approval

After all updates have been made to the Work Plan and a Preferred Alternative DCA has been selected, submit it for approval by the Approvers. Click the arrow next to Delete and click Submit for Approval.

Submitting for approval changes the Status to "Pending Owner Approval" and locks the Work Plan and Work Plan Task records. During the approval process, the records cannot be edited.



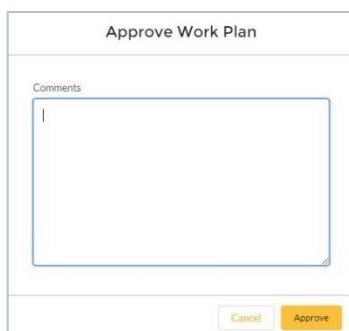
### Insured or Their Representative Approval of a Work Plan

When a service provider has completed a Work Plan, they submit it to the Approvers for approval. The Approvers receive email notification of the pending approval. Upon receipt of an approval email, click on the link to login to the Community. The link will take you directly to the Work Plan, which will have a Status of "Pending Owner Approval".

Review the Work Plan. If you are satisfied, approve it by scrolling down to the Approval History section. Click Approve.



Add a comment on the confirmation window, if desired. Click Approve.

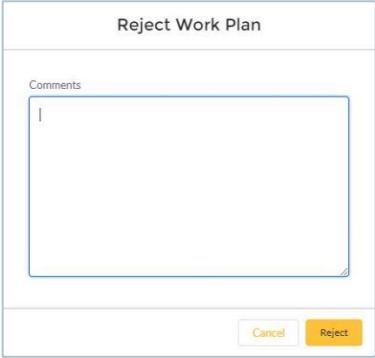


If you are not satisfied, reject it by scrolling down to the Approval History section. Click Reject.



A rectangular button with a light gray background. On the left, there is a small green icon of a person and the text "Approval History (2)". On the right, there are two buttons: "Approve" and "Reject". The "Reject" button is highlighted with a red border. To the right of the "Reject" button is a small downward-pointing triangle.

Add a comment on the confirmation window. Click Reject.



A dialog box titled "Reject Work Plan". It contains a text area labeled "Comments" with a vertical cursor. At the bottom, there are two buttons: "Cancel" and "Reject".

## Creating a Change Order and Change Order Task

Change Order Tasks represent the individual tasks, personnel, and equipment that will be necessary to complete the Change Order (aka individual line items). Change Orders are a product of approved Work Plans. Change Orders are used when adjustments must be made to the originally approved Work Plan. Furthermore, they can only be created under an approved Work Plan that they are intended to modify.

The Change Order approval process is identical to the Work Plan and Work Plan Tasks process. The primary difference between a Change Order Task and a Work Plan Task is the way in which they are made. A Work Plan Task is made under a DCA within the Work Plan. A Change Order Task is made under the Change Order item itself, within the Work Plan.

Once the Change Order has been created, with any appropriate Change Order Tasks, the Service Provider submits the Change Order to the insured for their approval. Once they approve the Change Order, it is automatically sent to PLIA for review. The process is outlined below.

### Steps to create and submit Change Order:

1. **Create new Change Order (SOW):** On the Work Plan that is to be modified, select “New Change Order” to create a Change Order.
  - a. Fill in any required fields on the New change Order and click Save.
  - b. Navigate to the bottom of the Work Plan and find all associated Change Order for the Work Plan. Select the newly created Change Order.
  - c. From the new Change Order, select “New Change Order Task”.
    - i. Select the appropriate item from the Task and Subtask dropdowns.
      1. *Note: The tasks listed here are the same as the Work Plan Tasks.*
    - ii. Fill in the other boxes as necessary. The Work Plan Task that is being modified is a required item.
2. **Submit for Approval:** After the Change Order Tasks have been entered, submit the Change Order for approval.
3. **Approval Process:** Once submitted for approval, the Change Order is automatically submitted to PLIA for review after the insured has approved the Change Order.
  - a. If the insured doesn't have access to the Online Community, a paper form must be signed by the insured and submitted to PLIA. Once received, PLIA will approve the Change Order on behalf of the insured.
4. **Post-Review:** The Service Provider is notified via email when the Change Order has been reviewed and approved/rejected.

## Tasks and Subtasks

This section outlines the different tasks and subtasks that may be used when creating Work Plan and Change Order Tasks. If you have additional questions about any of the items in this list, or to suggest a new item to be added to the list, please contact PLIA via email at [pliamail@plia.wa.gov](mailto:pliamail@plia.wa.gov).

*Note: Many tasks require you to use the “Task Description” field to clearly identify what you are estimating in your Work Plan or Change Order Task. For example, the subtask “Personnel” may be used to describe your hydrogeologist, your administrative staff, or both. Be sure to clearly identify what is being billed for each Work Plan or Change Order Task that is created. In addition, when you submit your invoice, ensure that your Invoice Items line up with your Work Plan or Change Order Tasks.*

Status	Task	Estimated Total
Completed		\$2,000.00

Work Plan Task Name  
WPT-005010

Status  
Completed

Task (Heating Oil)  
Field Equipment

Subtask (Heating Oil)  
Mounted Geo-Probe

Task Description  
123

### Work Plan Tasks and Subtasks

- **Professional Services**
  - **Personnel:** Can include personnel related to administrative, technical, or supervisory staff. Use the “Task Description” box to clearly define the item as necessary.
  - **Mileage:** Mileage charged to and from the job site. All mileage charges are subject to verification and must be justified.
- **Subcontracted Services**
  - **Backfill:** Materials used for the backfill of a site post-excavation.
  - **Environmental Covenant Preparation:** Administrative functions related to Environmental Covenant preparation (e.g. reports, correspondence with local entities, etc.).
  - **Groundwater Disposal:** Disposal of petroleum-contaminated groundwater.
  - **Groundwater Monitoring Well Installation:** Costs associated with the installation of permanent or temporary groundwater monitoring wells. Use the “Task Description” box to clearly define the item as necessary.
  - **GW Pump & Treat:** Costs associated with the pumping and treating of petroleum-contaminated groundwater. Use the “Task Description” box to clearly define the item as necessary.
  - **Landscaping:** Only available for the neighboring property. Cannot exceed \$1,500 for the entirety of the claim.
  - **Mileage:** Mileage charged to and from the job site. All mileage charges are subject to verification and must be justified.
  - **Necessary Site Modifications:** Examples may include the following: disassembly and removal of fence, tree removal, removal of concrete, etc. Use the “Task Description” box to clearly define the item as necessary.
  - **Ongoing Monitoring (per the EC):** Costs associated with ongoing monitoring (vapor or groundwater) as dictated in the Environmental Covenant. This field is for the costs associated with the sampling, not for personnel.
  - **Other (please specify):** Use the “Task Description” box to clearly define the item as necessary.
  - **Sewer/Electric/Water Line Repair & Replace:** Use the “Task Description” box to clearly define the item as necessary.

- **Soil/GW/Vapor Sampling:** Costs associated with conducting any sampling at the Site. Use the “Task Description” box to clearly define the item as necessary.
- **Soil Extraction & Disposal:** Costs associated with removal and disposal of soil at a licensed facility. For subcontracting only: Trucking costs can be included with this item if the subcontractor is handling the disposal of the petroleum-contaminated soil. Use the “Task Description” box to clearly define the item as necessary.
- **Administrative Services**
  - **Locate Utilities:** Administrative or personnel costs associated with locating private utilities at a Site.
  - **Permitting:** Administrative or personnel costs associated with acquiring necessary permits for a Site.
  - **Reports:** Administrative or personnel costs associated with report generation for a Site.
  - **Title Search:** Administrative or personnel costs associated with title search at a Site.
- **Supplies Equipment**
  - **Other Equipment:** Other necessary equipment for the Site – this should not include PPE or Safety Tape & Signs. Examples include the following: Steel plates (as required by local ordinance), disposable equipment, or other Site-specific equipment that is necessary to address contamination at the Site. Use the “Task Description” box to clearly define the item as necessary.
  - **PPE:** Costs associated with personal-protective equipment for a Site. Use the “Task Description” box to clearly define the item as necessary.
  - **Safety Tape & Signs:** Costs associated with safety tape or signs for a Site. Use the “Task Description” box to clearly define the item as necessary.
- **Field Equipment**
  - **Trucking:** Costs associated with trucking to and from the Site for disposal of petroleum-contaminated soil, backfill, or other Site-specific uses. This includes the renting of trucks if necessary. Use the “Task Description” box to clearly define the item as necessary.
  - **Excavator/Skidder:** Costs associated with the use of an excavator or skidder at a Site. Use the “Task Description” box to clearly define the item as necessary.
  - **Other Machinery:** If other machinery will be used at the Site, use the “Task Description” box to clearly define the item.
  - **Other (please specify):** Use the “Task Description” box to clearly define the item as necessary.
  - **Hand Auger:** Costs associated with the use of using a hand auger. Use the “Task Description” box to clearly define the item as necessary.
  - **Direct-Push:** Costs associated with the use of using a direct-push auger. Use the “Task Description” box to clearly define the item as necessary.
  - **Mounted Geo Probe:** Costs associated with the use of using a mounted geo probe. Use the “Task Description” box to clearly define the item as necessary.
- **Field Work:**
  - **Backfill:** Materials used for the backfill of a site post-excavation. Trucking costs are a separate task.
  - **Environmental Covenant Preparation:** Administrative functions related to Environmental Covenant preparation (e.g. reports, correspondence with local entities, etc.).
  - **Groundwater Disposal:** Disposal of petroleum-contaminated groundwater.
  - **Groundwater Monitoring Well Installation:** Costs associated with the installation of permanent or temporary groundwater monitoring wells. Use the “Task Description” box to clearly define the item as necessary.
  - **GW Pump & Treat:** Costs associated with the pumping and treating of petroleum-contaminated groundwater. Use the “Task Description” box to clearly define the item as necessary.
  - **Landscaping:** Only available for the neighboring property. Cannot exceed \$1,500 for the entirety of the claim.



- **Mileage:** Mileage charged to and from the job site. All mileage charges are subject to verification and must be justified.
- **Necessary Site Modifications:** Examples may include the following: disassembly and removal of fence, tree removal, removal of concrete, etc. Use the “Task Description” box to clearly define the item as necessary.
- **Ongoing Monitoring (per the EC):** Costs associated with ongoing monitoring (vapor or groundwater) as dictated in the Environmental Covenant. This field is for the costs associated with the sampling, not for personnel.
- **Other (please specify):** Use the “Task Description” box to clearly define the item as necessary.
- **Sewer/Electric/Water Line Repair & Replace:** Use the “Task Description” box to clearly define the item as necessary.
- **Soil/GW/Vapor Sampling:** Costs associated with conducting any sampling at the Site. Use the “Task Description” box to clearly define the item as necessary.
- **Soil Extraction & Disposal:** Costs associated with removal and disposal of soil at a licensed facility. Trucking costs should be listed as their own “task”. The location for this task is located under “Field Equipment” > “Excavation Equipment” > “Trucking”. Use the “Task Description” box to clearly define the item as necessary.