

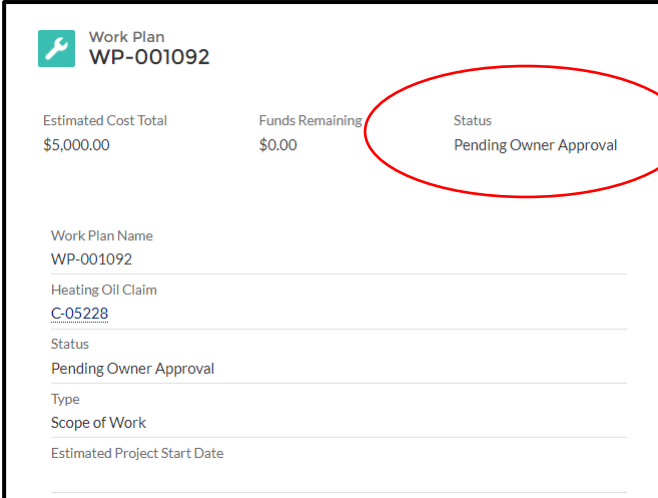
How to approve Scope of Work, Change Order, or Invoice in the Online Community

In the Online Community, the selected Service Provider submits documentation for review and approval by the Heating Oil Tank Owner (Owner). If an Owner is unable to access the Online Community, paper forms may be substituted for the approval process. Here is an overview of the Online Community approval process:

- The Service Provider creates a Scope of Work (SOW), Change Order (CO), or Invoice in the Online Community for the Owner to review.
 - If the Owner cannot access the Online Community, a paper approval form (available on PLIA's [website](#)) must be completed and signed by the Owner, then submitted to PLIA.
- The Owner reviews the document and will approve or deny the submission.
 - If the Owner approves, the SOW, CO, or Invoice goes to PLIA for review.
 - If the Owner denies, the SOW, CO, or Invoice is returned to the Service Provider for correction and possible resubmission.
- Once approved by the Owner and PLIA, the SOW, CO, or Invoice returns to the Service Provider to take the appropriate action in meeting the request.

Step-by-Step Process in Online Community

1. When a Service Provider submits a SOW, CO, or Invoice for approval, the Owner receives an approval request email notification.
2. Upon receipt of an approval request email from the Online Community, the Owner must log into the Online Community and can then click on the link in the email. The Owner views the submission.
 - a. From the email link, the Owner is directed to the pending submission.
 - b. The submission has a Status labeled "Pending Owner Approval."



The screenshot shows a web interface for a Work Plan submission. At the top left, there is a green wrench icon followed by the text "Work Plan WP-001092". Below this, there are three columns of information: "Estimated Cost Total" with a value of "\$5,000.00", "Funds Remaining" with a value of "\$0.00", and "Status" with a value of "Pending Owner Approval". The "Status" field is circled in red. Below the main information, there are several fields with labels and values: "Work Plan Name" (WP-001092), "Heating Oil Claim" (C-05228), "Status" (Pending Owner Approval), "Type" (Scope of Work), and "Estimated Project Start Date" (blank).

Estimated Cost Total	Funds Remaining	Status
\$5,000.00	\$0.00	Pending Owner Approval

Work Plan Name
WP-001092

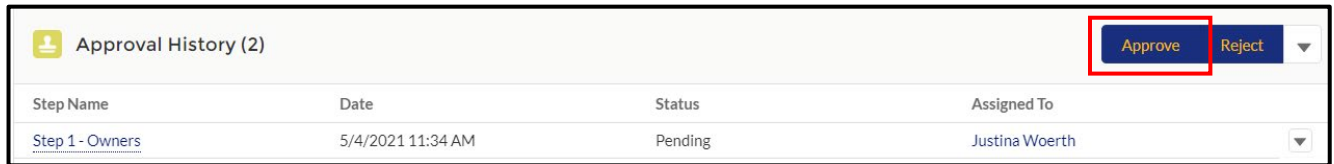
Heating Oil Claim
C-05228

Status
Pending Owner Approval

Type
Scope of Work

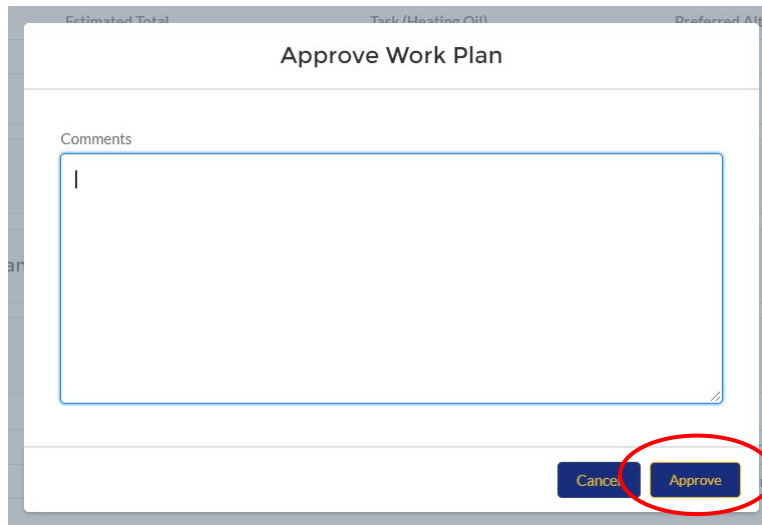
Estimated Project Start Date

3. Review the item. If the Owner is satisfied, they scroll down to the Approval History section and select "Approve."



Step Name	Date	Status	Assigned To
Step 1 - Owners	5/4/2021 11:34 AM	Pending	Justina Woerth

4. The Owner can also add a comment on the confirmation window. Once the comment(s) are entered, the Owner selects "Approve."



Estimated Total: Task / (Hasting Oil) Preferred Alt

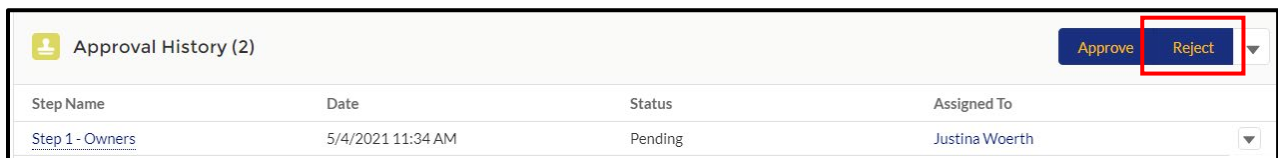
Approve Work Plan

Comments

|

Cancel Approve

5. This submits the item to PLIA for final review and approval. No further action is needed on this submission.
6. If the Owner is not satisfied or disagrees with the submission, the Owner can reject it by scrolling down to the "Approval History" section and selecting "Reject." This sends the item back to the Service Provider for revision and possible resubmission.



Step Name	Date	Status	Assigned To
Step 1 - Owners	5/4/2021 11:34 AM	Pending	Justina Woerth