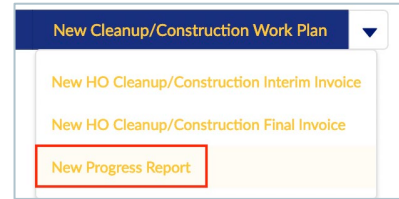


Create a Progress Report

Once the Financial Agreement has been signed, the Consultant, Applicant, Co-Owner, or Primary Contact will create a monthly Progress Report with updates about the progress on the Project and submit it to PLIA for approval.

Navigate to the Project record and click the New Progress Report button.



Complete the following fields:

- Completed Activities
- Deviations from Required Tasks
- Deviations from Scope of Work
- Deviations from Schedule
- Future Deliverables

Save.

When saved, the Due Date is automatically entered. A reminder email is sent 7 days before this date. Another email is sent 1 day after this date if a Progress Report hasn't been submitted.

If a Progress Report is created by the Applicant or Primary Contact, the Consultant will not be able to view or edit the report unless they are made the Owner. Because submitted Progress Reports can't be edited, this should be done **before** it's submitted to PLIA.

To change the owner, click the icon next to the Owner field.

Select your Consultant. Send notification email will be checked by default.

Click Change Owner.

Submit a Progress Report

When a Progress Report is complete, you may submit it to PLIA. Navigate to the Progress Report and click Submit.

In the popup, click Save.

PLIA will be notified of your submission.

If you submit your Progress Report in error, please contact PLIA and request that it be set back to "In Progress".

The screenshot shows a navigation bar with three buttons: "Submit", "Edit", and "Printable View". The "Submit" button is highlighted with a red box. Below this is a modal window titled "Submit" with a "Cancel" button and a "Save" button, where the "Save" button is also highlighted with a red box.

Clone a Progress Report

The Clone button can be used to simplify creation of multiple similar monthly Progress Reports.

To clone a Progress Report, navigate to an existing Progress Report and click Clone.

Select LG Program – Open and click Next.

Update the following fields as needed:

- Completed Activities
- Deviations from Required Tasks
- Deviations from Scope of Work
- Deviations from Schedule
- Future Deliverables

Save.

The screenshot shows a modal window titled "Clone Progress Report". It contains a message: "The original record type is no longer available. Please select another record type." Below this is a section titled "Available record types" with four radio button options: "LG Program - Open Unsubmitted Progress Reports" (selected), "TAP Confirmation Monitoring - Open", "TAP Milestone Deviation Request - Open For requesting change to a Milestone's Projected Completion Date", and "TAP Performance Monitoring - Open". At the bottom right, there are "Cancel" and "Next" buttons.

Note: When a submitted Progress Report is cloned, the Status is change to "In Progress", therefore the new Progress Report must be submitted when complete.