PPA Work Plan

Once the PPA Work Plan is assigned, the Consultant updates it with additional information and estimated costs, and submits it to PLIA for approval.

Note: On the Work Plan, the currency fields: Phase 1 Estimate, Phase 2 Estimate, and Estimated Total are calculated automatically from amounts given on Work Plan Task records. Invoice Total is calculated automatically from amounts given on Invoice records. These fields cannot be manually changed on the Work Plan.

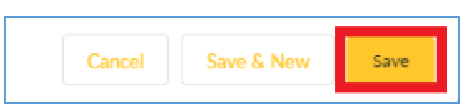
Update Work Plan record

Navigate to the Work Plan record and click Edit.

Update the following fields:

- Site Background - Provide background information including previous land use.
- Project Plan Summary - Summarize the proposed remedial action at the Site.
- Timeline - Phase 1 - Provide a timeline that will be followed to meet the objectives in PPA Phase 1.
- Project Information - Summarize the remedial action that has occurred at the Site.
- Timeline - Phase 2 - Provide a timeline that will be followed to meet the objectives in PPA Phase 2.

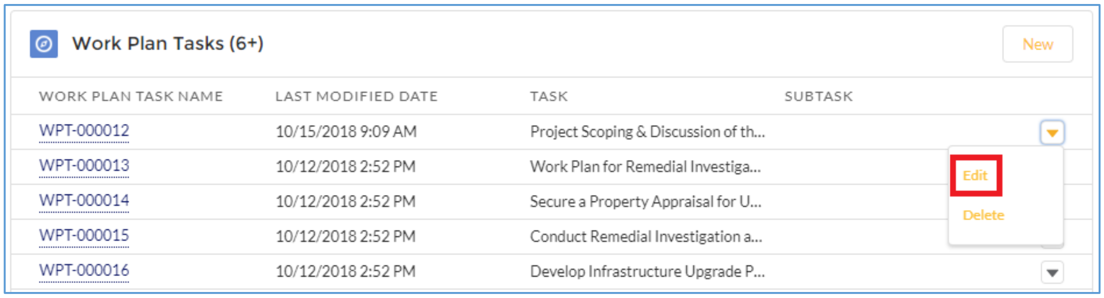
Save.



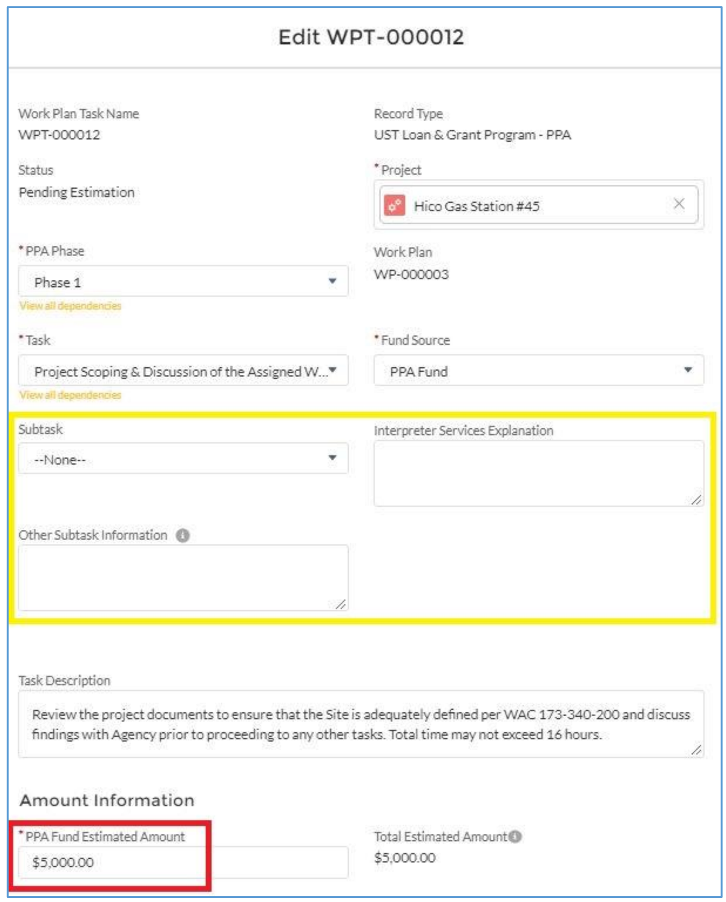
Update Work Plan Task records

To edit a Work Plan Task record, navigate to the Work Plan record.

Scroll down to the Work Plan Task list. Click the arrow next to the Work Plan Task and click Edit.

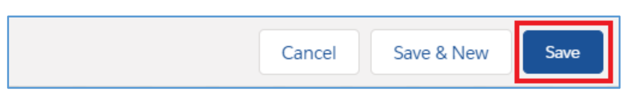


Many fields will be pre-populated.



- Status – pre-populated with "Pending Estimation"
- Project – pre-populated with the Project associated with the Work Plan
- PPA Phase – pre-populated
- Work Plan – pre-populated
- Task – pre-populated
- Fund Source – pre-populated with "PPA Fund"
- Subtask – provide a value if desired. Not required. (Subtask information can be included on Invoices.)
- Interpreter Services Explanation – complete if needed. Not required.
- complete if needed. Not required.
- Other Subtask Information – If "Other" was selected for Subtask, provide an explanation. Not required. (Subtask information can be included on Invoices.)
- Task Description – pre-populated
- PPA Fund Estimated Amount – enter an amount.

Save.

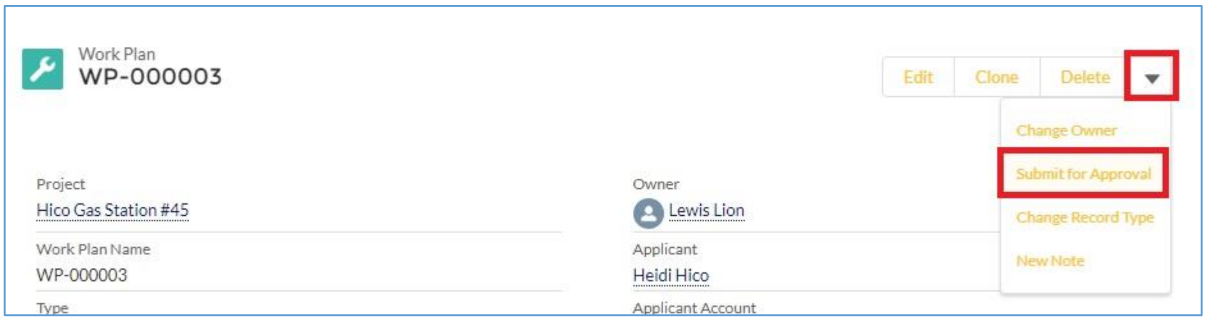


PPA Work Plan Approval Process

Work Plan approval is a two-step process. First, the Work Plan is submitted to all designated site owners for approval. Once approved by site owners, the Work Plan is submitted to PLIA for approval.

Submit Work Plan for Approval by Site Owner

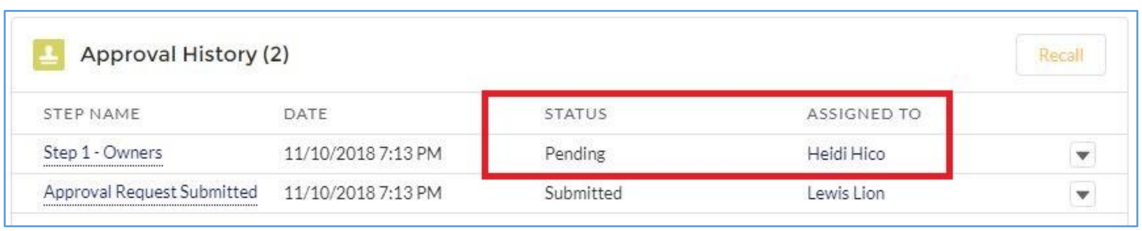
After all updates have been made to the Work Plan, submit it for approval by the site owners who are listed as Approvers on the Work Plan. Click the arrow next to Delete and click Submit for Approval.



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. All Approvers are notified via email of the pending approval.

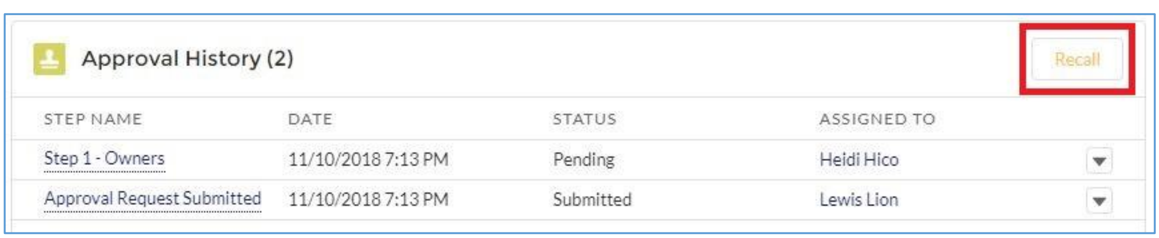
View Approval Status

To view a Work Plan’s approval status, navigate to the Work Plan and scroll down to the Approval History section. The top line item shows the current status and the designated Approver.



Recall an Approval Submission

If a Work Plan was submitted for approval in error, it can be recalled. This unlocks the record to allow editing and resubmission. To recall, navigate to the Work Plan. Scroll down to the Approval History section and click Recall.



Owner Approval of a Work Plan

When a consultant has completed estimating a Work Plan, they submit it to designated site owners for approval. Owners 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”.


Washington State Pollution Liability Insurance Agency
Loan and Grant Program

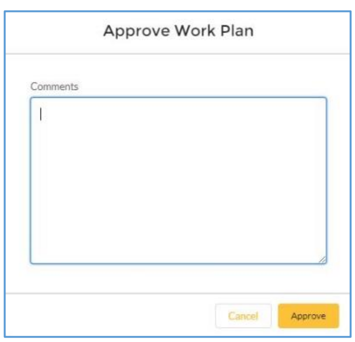
A Work Plan for project has been submitted for your approval. Please log in to the Loan and Grant Community to review the proposed work plan. If you are satisfied, please approve it. Please contact your consultant with any questions.

Note: After your approval, PLIA may still request changes.

Pollution Liability Insurance Agency
(360) 407-0520 | PO Box 40930, Olympia, WA 98504
pliamail @plia.wa.gov | www.plia.wa.gov | @PLIAWA

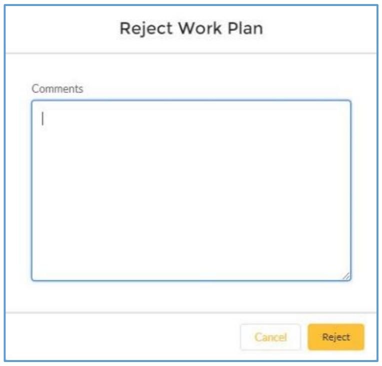
Review the Work Plan. If you are satisfied, approve it by scrolling down to the Approval History section. Click Approve.

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



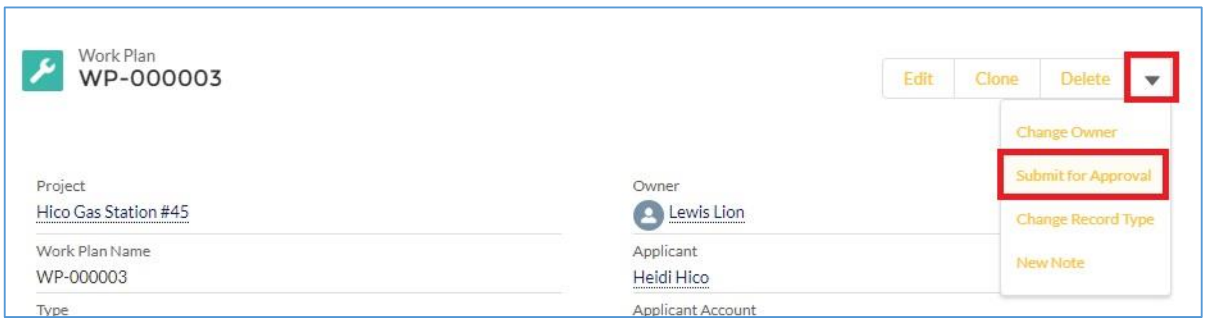
If you are not satisfied, reject it by scrolling down to the Approval History section. Click Reject.

Add a comment on the confirmation window. Click Reject.



Submit Work Plan for Approval by PLIA

After all designated site owners have approved the Work Plan, the Status will be “Owner Approved”. You can then submit it for approval by PLIA. Click the arrow next to Delete and click Submit for Approval.



Submitting for approval changes the Status to “Pending Approval” and locks the Work Plan and Work Plan Task records. During the approval process, the records cannot be edited by the consultant. PLIA is notified via email of the pending approval.