

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.

Financial Information	
Phase 1 Estimate ⓘ	Estimated Total ⓘ
\$5,000.00	\$9,200.00
Phase 2 Estimate ⓘ	Invoice Total ⓘ
\$4,200.00	\$3,750.00

Update Work Plan record

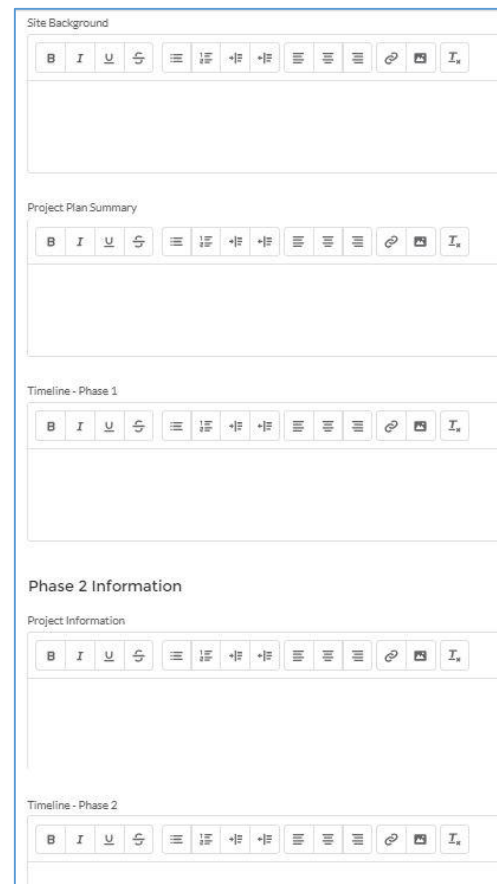
Navigate to the Work Plan record and click Edit.



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.



The screenshot shows the main content area of the PPA Work Plan form. It consists of several sections, each with a rich text editor toolbar (containing icons for Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, and Insert Table):

- Site Background**
- Project Plan Summary**
- Timeline - Phase 1**
- Phase 2 Information**
- Project Information**
- Timeline - Phase 2**

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.

WORK PLAN TASK NAME	LAST MODIFIED DATE	TASK	SUBTASK
WPT-000012	10/15/2018 9:09 AM	Project Scoping & Discussion of th...	
WPT-000013	10/12/2018 2:52 PM	Work Plan for Remedial Investiga...	
WPT-000014	10/12/2018 2:52 PM	Secure a Property Appraisal for U...	
WPT-000015	10/12/2018 2:52 PM	Conduct Remedial Investigation a...	
WPT-000016	10/12/2018 2:52 PM	Develop Infrastructure Upgrade P...	

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.
- 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.

Edit WPT-000012

Work Plan Task Name WPT-000012	Record Type UST Loan & Grant Program - PPA
Status Pending Estimation	* Project Hico Gas Station #45
* PPA Phase Phase 1	Work Plan WP-000003
* Task Project Scoping & Discussion of the Assigned W...	* Fund Source PPA Fund
Subtask --None--	Interpreter Services Explanation
Other Subtask Information	
Task Description Review the project documents to ensure that the Site is adequately defined per WAC 173-340-200 and discuss findings with Agency prior to proceeding to any other tasks. Total time may not exceed 16 hours.	
Amount Information	
* PPA Fund Estimated Amount \$5,000.00	Total Estimated Amount \$5,000.00

Save.

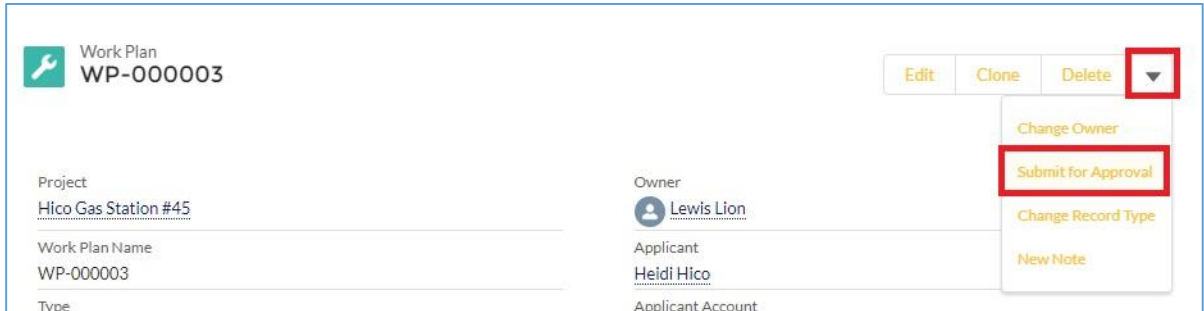
Cancel Save & New Save

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.

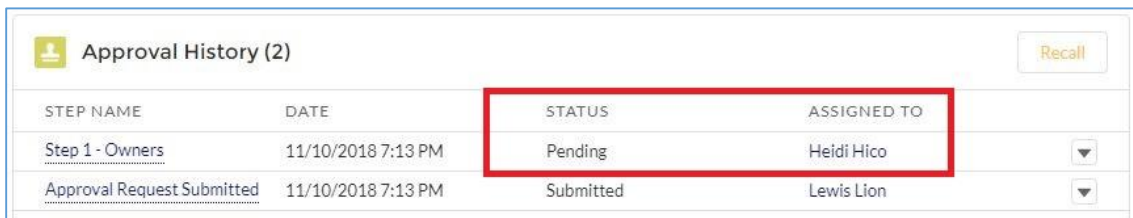


The screenshot shows a Work Plan record for 'WP-000003' at 'Hico Gas Station #45'. The record details include the Project name, Work Plan Name, Owner (Lewis Lion), Applicant (Heidi Hico), and Applicant Account. A dropdown menu is open next to the 'Delete' button, with the 'Submit for Approval' option highlighted in a red box.

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.

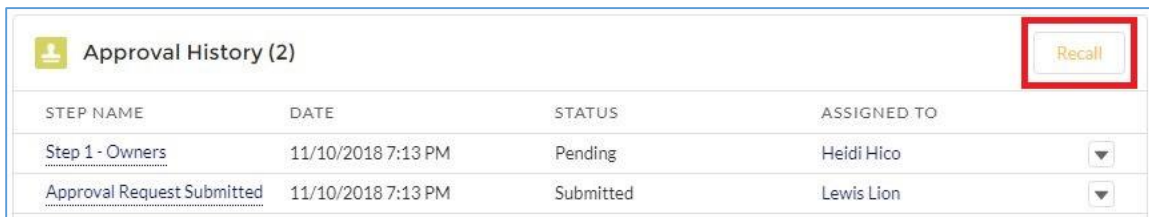


The screenshot shows the 'Approval History (2)' section with a 'Recall' button. The table below has the following data:

STEP NAME	DATE	STATUS	ASSIGNED TO
Step 1 - Owners	11/10/2018 7:13 PM	Pending	Heidi Hico
Approval Request Submitted	11/10/2018 7:13 PM	Submitted	Lewis Lion

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.



The screenshot shows the 'Approval History (2)' section with the 'Recall' button highlighted in a red box. The table below has the following data:

STEP NAME	DATE	STATUS	ASSIGNED TO
Step 1 - Owners	11/10/2018 7:13 PM	Pending	Heidi Hico
Approval Request Submitted	11/10/2018 7:13 PM	Submitted	Lewis Lion

Owner Approval of a Work Plan

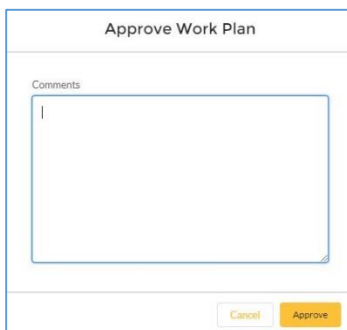
When a consultant has completed estimating a Work Plan, they submit it to designated site owners for approval. Owners receive email notification of the pending approval. Upon receipt of an approval email, click on the link to login to the Community. The link will take you directly to the Work Plan, which will have a Status of “Pending Owner Approval”.



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



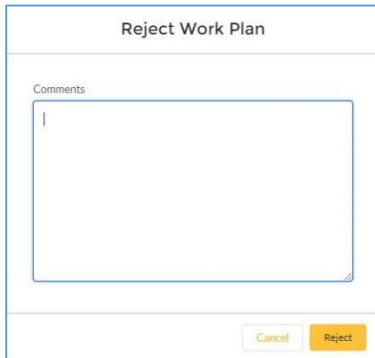
Add a comment on the confirmation window, if desired. Click Approve.



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.



The image shows a confirmation window titled "Reject Work Plan". It features a text area labeled "Comments" with a cursor at the beginning. At the bottom right, there are two buttons: "Cancel" and "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.



The image shows a details page for a Work Plan. The title is "Work Plan WP-000003" with a wrench icon. The page lists several fields: Project (Hico Gas Station #45), Work Plan Name (WP-000003), Type, Owner (Lewis Lion), Applicant (Heidi Hico), and Applicant Account. In the top right corner, there are buttons for "Edit", "Clone", and "Delete". A red box highlights the "Delete" button, which has a dropdown arrow. The dropdown menu is open, showing options: "Change Owner", "Submit for Approval" (highlighted with a red box), "Change Record Type", and "New Note".

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.