

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.

Work Plan
WP-000003



Project
Hico Gas Station #45

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.

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
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Save.

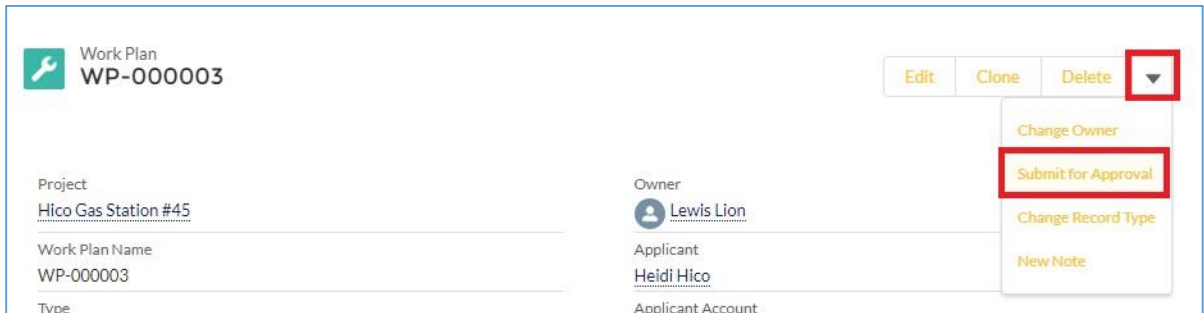
Cancel
Save & New
Save

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' with project 'Hico Gas Station #45'. The owner is 'Lewis Lion' and the applicant is 'Heidi Hico'. A dropdown menu is open next to the 'Delete' button, with 'Submit for Approval' highlighted.

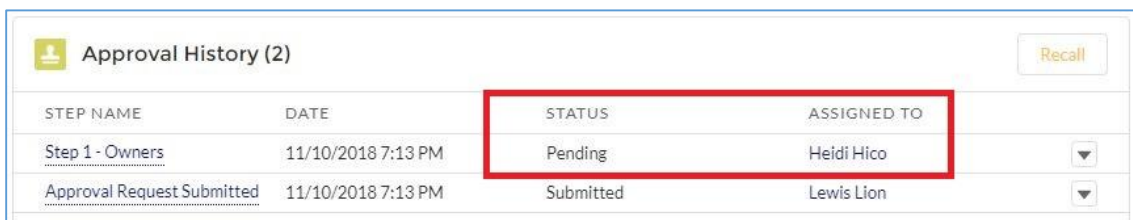
Field	Value
Project	Hico Gas Station #45
Work Plan Name	WP-000003
Type	
Owner	Lewis Lion
Applicant	Heidi Hico
Applicant Account	

Buttons: Edit, Clone, Delete (dropdown), Change Owner, **Submit for Approval**, Change Record Type, New Note.

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.

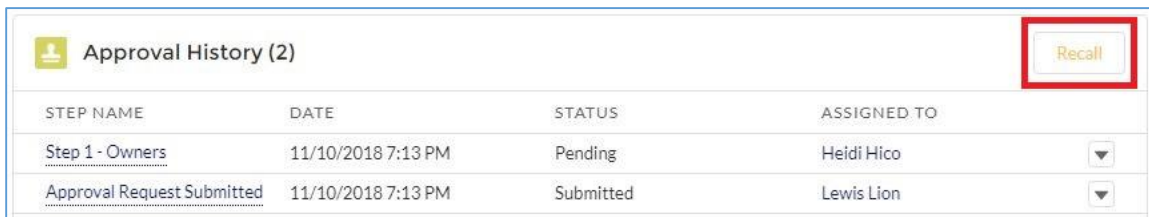


The screenshot shows the 'Approval History (2)' section with a 'Recall' button. The table below shows the approval history.

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

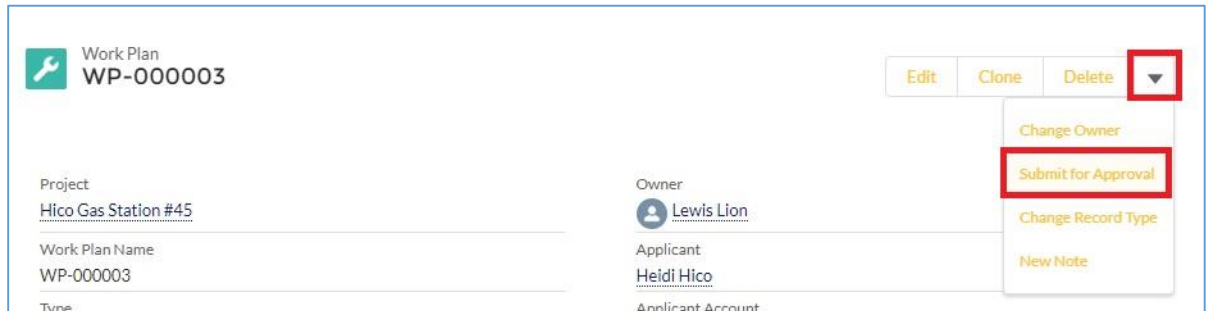


The screenshot shows the 'Approval History (2)' section with the 'Recall' button highlighted in a red box.

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

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 screenshot shows a user interface for a Work Plan record. At the top left, there is a green wrench icon followed by the text "Work Plan WP-000003". To the right of this are three buttons: "Edit", "Clone", and "Delete". A red box highlights a downward-pointing arrow next to the "Delete" button. A dropdown menu is open below the arrow, containing four options: "Change Owner", "Submit for Approval", "Change Record Type", and "New Note". The "Submit for Approval" option is highlighted with a red box. Below the buttons, the record details are displayed in two columns. The left column has "Project" with the value "Hico Gas Station #45" and "Work Plan Name" with the value "WP-000003". The right column has "Owner" with a profile icon and the name "Lewis Lion", "Applicant" with the name "Heidi Hico", and "Applicant Account" which is currently blank. The "Type" field at the bottom left is also blank.

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.