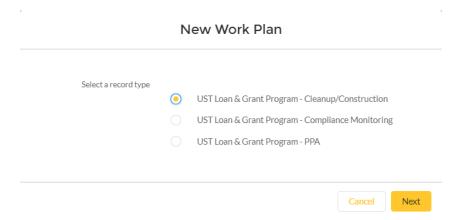# Create Cleanup/Construction Work Plan record

Once approved for the Cleanup/Construction phase, the Consultant creates a Work Plan with line item records called Work Plan Tasks and submits it to PLIA for approval.

Navigate to the Project and then to the Cleanup/Construction Project Phase record. On the Project Phase record, click the arrow next to Work Plans and click New.

Work Plans (2)   New

Select the UST Loan & Grant Program - Cleanup/Construction record type. Click Next.

New Work Plan

Select a record type

◉ UST Loan & Grant Program - Cleanup/Construction

○ UST Loan & Grant Program - Compliance Monitoring

○ UST Loan & Grant Program - PPA

Cancel   Next

These record types can be used only as labeled, e.g., UST Loan & Grant Program - PPA cannot be used to create a Work Plan for a Cleanup/Construction Project Phase.

Update the following fields:

- Project – Auto-populated with Project
- Owner – Your name
- Work Plan Name – Auto-populated on Save
- Applicant – Auto-populated on Save
- Type – Auto-populated based on record type
- Applicant Account – Auto-populated on Save
- Status – Not editable. Defaults to "New"
- Project Phase – Enter "cleanup" and select Project Phase associated with Project.
- Approvers, Primary Contact, Additional Notifications – Not editable. Will be populated with corresponding Project values when the record is saved the first time.

New Work Plan: UST Loan & Grant Program - Cleanup/Construction

Information

Project   Owner
Hico Gas Station #45   ×   Lewis Lion

Work Plan Name   Applicant

Type   Applicant Account
Cleanup/Construction   ▼   Search Accounts...   🔍

Status   * Project Phase
New   Cleanup/Construction   ×

Approvers and Notifications

Approver 1   Primary Contact

Approver 2   Additional Notification 1

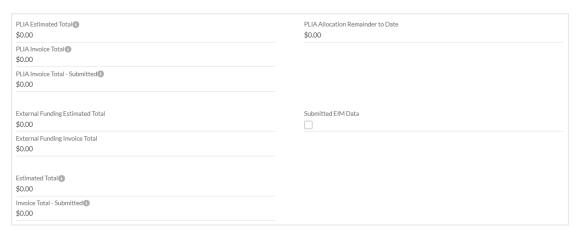Approver 3   Additional Notification 2

Approver 4   Additional Notification 3
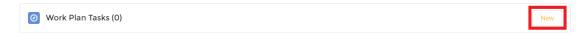
Save.

Cancel   Save & New   Save

Note: On the Work Plan, the currency field Estimated Total is calculated automatically from amounts given on Work Plan Task records. Invoice Total and Invoice Total – Submitted are calculated automatically from amounts given on Invoice records. Allocation Remainder to Date is calculated automatically from Invoice and Allocation records. These fields cannot be manually changed on the Work Plan.
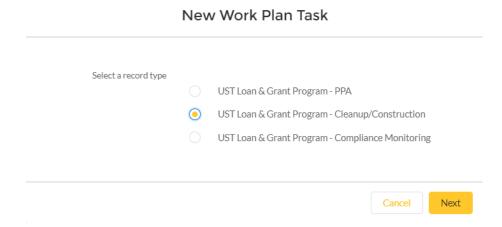

Create Work Plan Task records

From the Work Plan, scroll down to Work Plan Tasks and click New.

There are different Work Plan Task record types. A selection window will appear. Depending on the record type selected, the form may look different – with different fields, requirements, layout, etc.
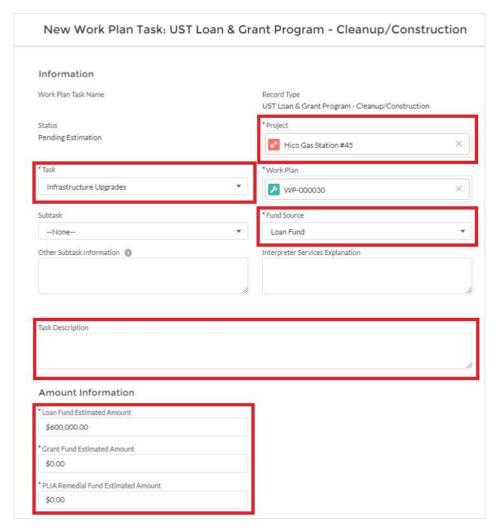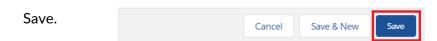

These record types can be used only as labeled, e.g., UST Loan & Grant Program - PPA cannot be used to create a Work Plan Tasks for a Cleanup/Construction Work Plan.

Select UST Loan & Grant Program - Cleanup/Construction and click Next.

- Work Plan Task Name – Auto-populated on Save.
- Record Type – Auto-populated
- Status – Auto-populated with "Pending Estimation"
- Project – Click on the field and select the Project associated with the Work Plan
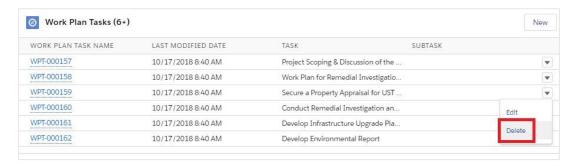- Task – Select a value

- Work Plan – Because you are creating the Work Plan Task record from the Work Plan, Work Plan is auto-populated.
- Subtask – Provide a value if desired. Not required.
- Fund Source – Select a value
- Other Subtask Information – If "Other" was selected for Subtask, provide an explanation.
- Interpreter Services Explanation – Complete if needed. Not required.
- Task Description – Enter the description
- Amount Information section – Each field requires a value. Enter an estimated amount in the field that corresponds with the Fund Source, and "0" in the other fields.
  Only one Estimate Amount field can have a non-zero value. If the amount estimated for a single Task spans multiple Fund Sources, you must create separate Work Plan Task records for each Fund Source.

New Work Plan Task: UST Loan & Grant Program - Cleanup/Construction

Information

Work Plan Task Name	Record Type
	UST Loan & Grant Program - Cleanup/Construction

Status
Pending Estimation

* Project
Hico Gas Station #45

* Task
Infrastructure Upgrades

* Work Plan
WP-000030

Subtask
--None--

* Fund Source
Loan Fund

Other Subtask Information

Interpreter Services Explanation

Task Description

Amount Information

* Loan Fund Estimated Amount
$600,000.00

* Grant Fund Estimated Amount
$0.00

* PLIA Remedial Fund Estimated Amount
$0.00

Save.

Cancel   Save & New   Save

Remove Work Plan Task records

If a Work Plan Task record has been created in error, it can be deleted. Navigate to the Work Plan. Scroll down to the Work Plan Task list. Click on the arrow next to the item you want to delete. Click Delete.

On the confirmation screen, click Delete.