

How to Create and Submit a New Heating Oil Loan & Grant Cleanup/Construction Work Plan

Once approved for the Cleanup/Construction phase, you, the Consultant, will create a Work Plan with line item records called Work Plan Tasks and submit it to the client and then PLIA for approval.

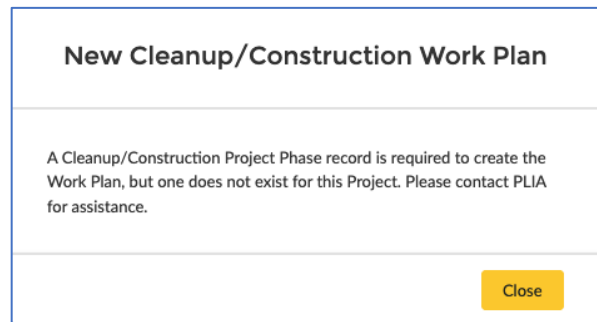
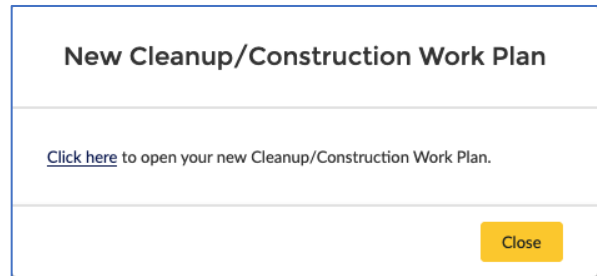
Navigate to the Project and click New Cleanup/Construction Work Plan.



The record will be automatically created. Click on the link to open it in a new tab.

Note: All of the editable Work Plans fields on your new record will be auto-populated. The currency field Estimated Total is calculated automatically from amounts entered on Work Plan Task records. Invoice-related fields are calculated automatically from amounts entered on Invoice records. These fields cannot be manually changed on the Work Plan.

Note: A Cleanup/Construction Project Phase record must exist for the Project in order to create the Work Plan. If one does not exist, this message will be displayed.



Create Work Plan Task Records

From the Work Plan, click New Work Plan Task.



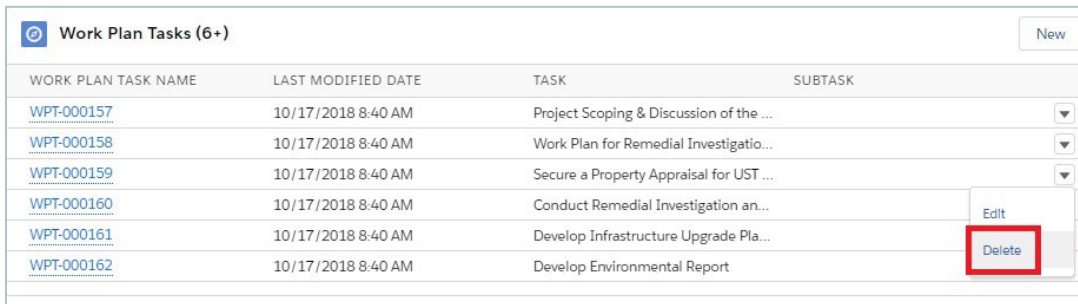
Enter your information, then Save.

- Task – Select a value
- Subtask – Optional
- 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
- Loan Fund Estimated Amount – Requires a value. Enter an estimated amount if the Fund Source is “Loan Fund”. Otherwise, enter “0”.

- Grant Fund Estimated Amount – Requires a value. Enter an estimated amount if the Fund Source is “Grant Fund”. Otherwise, enter “0”.
- Note: Only one Estimated 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.

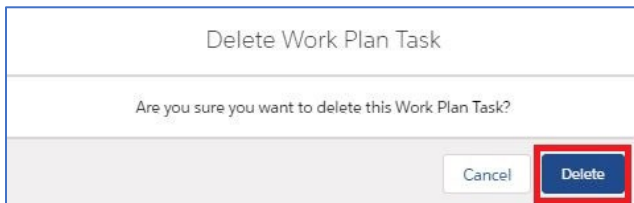
Remove Work Plan Task Records

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.



WORK PLAN TASK NAME	LAST MODIFIED DATE	TASK	SUBTASK
WPT-000157	10/17/2018 8:40 AM	Project Scoping & Discussion of the ...	▼
WPT-000158	10/17/2018 8:40 AM	Work Plan for Remedial Investigatio...	▼
WPT-000159	10/17/2018 8:40 AM	Secure a Property Appraisal for UST ...	▼
WPT-000160	10/17/2018 8:40 AM	Conduct Remedial Investigation an...	▼
WPT-000161	10/17/2018 8:40 AM	Develop Infrastructure Upgrade Pla...	▼
WPT-000162	10/17/2018 8:40 AM	Develop Environmental Report	▼

On the confirmation screen, click Delete.



Delete Work Plan Task

Are you sure you want to delete this Work Plan Task?


Cancel Delete

Cleanup/Construction Work Plan Approval Process

Work Plan approval is a two-step process. First, the Work Plan is submitted to the designated Approvers or the applicant/property owner if no Approvers are listed. When this step is completed, the Work Plan is submitted to PLIA for approval.

Submit Work Plan for Approval

After all updates have been made to the Work Plan, submit it for approval by the owners. Click Submit for Approval.

 **Work Plan**
WP-001762


[Edit](#) [Submit for Approval](#) [Clone](#) ▼

Estimated Cost Total	Status
\$0.00	SOW Signed

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.

 **Approval History (2)** [Recall](#)

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.

 **Approval History (2)** [Recall](#)

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