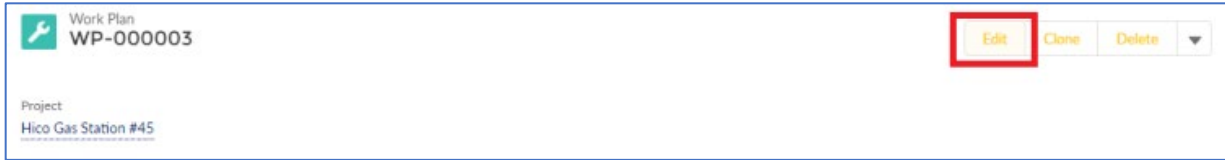


How to Update and Submit a New Heating Oil Loan & Grant PPA Work Plan

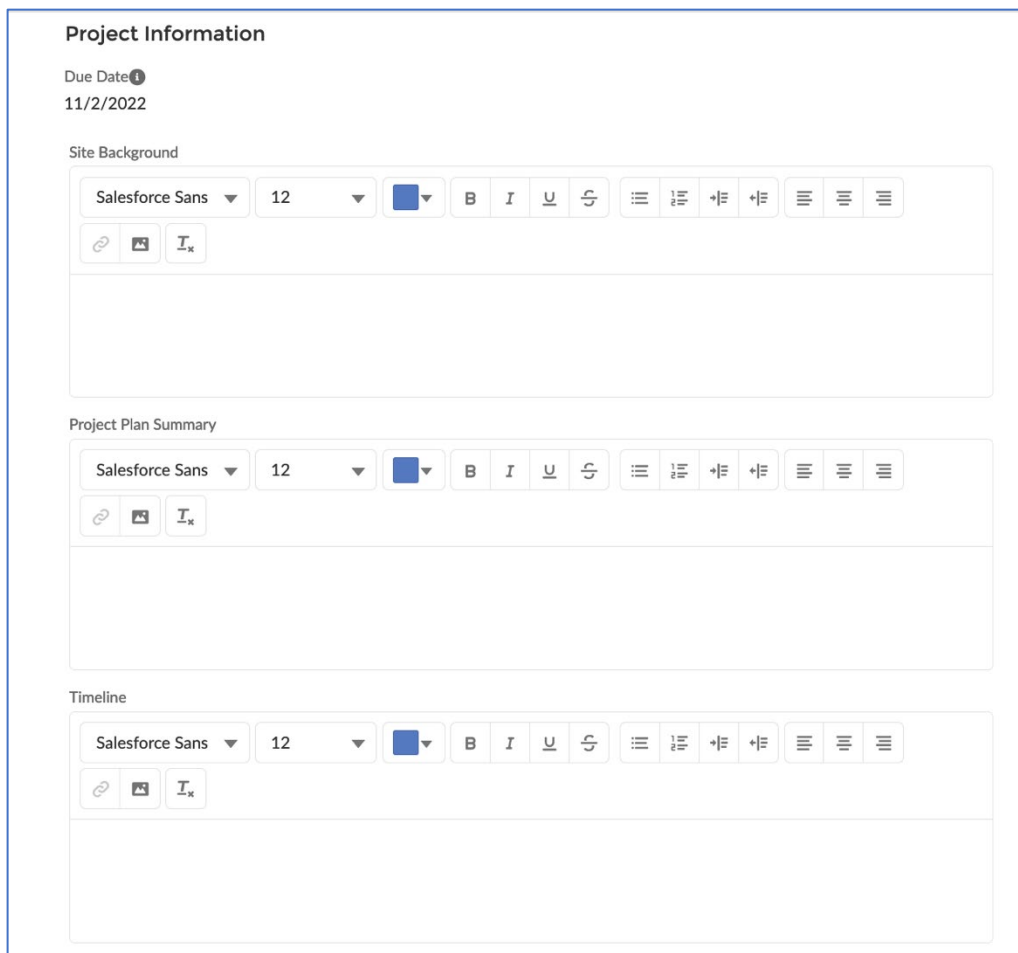
Once the Heating Oil Loan & Grant PPA Work Plan is assigned to you, the Consultant, you will update it with additional information and estimated costs, and submit it for approval.

Navigate to the Work Plan record and click Edit.

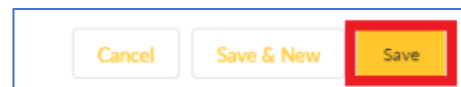


Update the following fields:

- Site Background - Provide background information including previous land use.
- Project Plan Summary - Summarize the proposed remedial action at the Site.
- Timeline - Provide a timeline that will be followed to meet the objectives.

A screenshot of a 'Project Information' form. The form has a title 'Project Information' and a 'Due Date' field with a dropdown arrow, showing '11/2/2022'. Below this are three sections, each with a rich text editor. The first section is 'Site Background', the second is 'Project Plan Summary', and the third is 'Timeline'. Each section has a toolbar with options for font face (Salesforce Sans), font size (12), background color (blue), bold (B), italic (I), underline (U), link, unlink, bulleted list, numbered list, indent, and outdent. There are also icons for link, image, and link icon.

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	PLIA Total Estimated Amount	Estimated Total	Task
WPT-003257	\$0.00	\$0.00	Project Scoping & Discussion ...
WPT-003258	\$0.00	\$0.00	Work Plan for Remediation ...
WPT-003259	\$0.00	\$0.00	Conduct Remedial Investigation...
WPT-003260	\$0.00	\$0.00	Develop Environmental Report
WPT-003261	\$0.00	\$0.00	Develop Sampling and Analy...

[View All](#)

Many fields are pre-populated:

- Status
- Project
- PPA Phase
- Work Plan
- Task
- Fund Source
- Task Description

Update these fields:

- Subtask – provide a value if desired. Not required. (Subtask information can be included on Invoices.)
- Other Subtask Information – If “Other” was selected for Subtask, provide an explanation. Not required. (Subtask information can be included on Invoices.)
- Interpreter Services Explanation – complete if needed. Not required.
- PPA Fund Estimated Amount – enter an amount.

Edit WPT-003257

*Task
Project Scoping & Discussion of the Assigned Work

Subtask
--None--

Other Subtask Information ⓘ

* Fund Source
PPA Fund

Interpreter Services Explanation

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 8 hours.

Amount Information

* PPA Fund Estimated Amount
\$0.00

PLIA Total Estimated Amount ⓘ
\$0.00

PLIA Invoice Amount ⓘ
\$0.00

PLIA Invoice Total - Submitted ⓘ
\$0.00

Save.

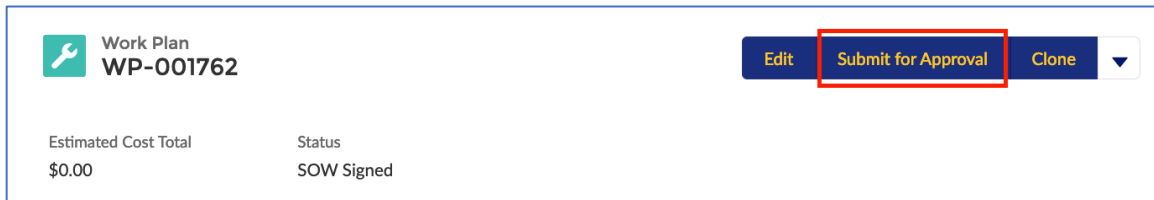
[Cancel](#) [Save & New](#) [Save](#)

PPA Work Plan Approval Process

Work Plan approval is a two-step process. First, the Work Plan is submitted to 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

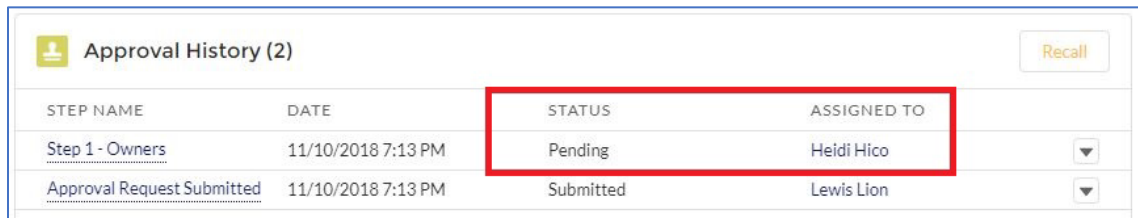
Estimated Cost Total: \$0.00
Status: SOW Signed

Buttons: Edit, **Submit for Approval**, Clone

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

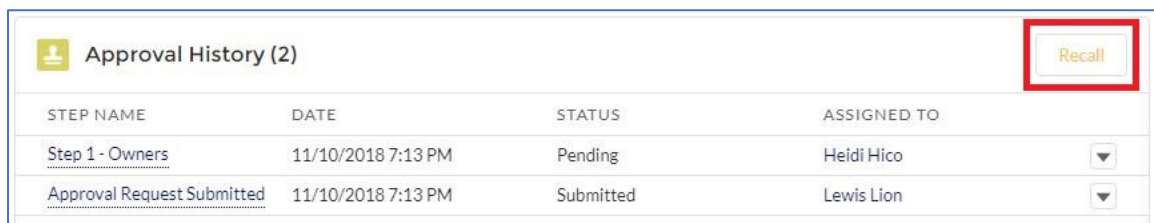
To view a Work Plan’s approval status, navigate to the Work Plan and scroll down to the Approval History section. The top line item shows the current status and the designated Approver.



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.



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 button highlighted.