

HOW TO - Approving Officer - Project Monitoring Actions

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1. The *Approving Officer* is the person responsible for signing off on the report to state that the information is accurate to the best of their knowledge. In most cases, this will be the PWM, but they may delegate this role to a PCE for example. If the project is at a *Planning and Investigation* or *Design* stage, then this may differ.
 2. Once the Monitoring Officer has turned the 'Monitoring Completed' option to Yes in the Monitoring Actions record, this will trigger an email to be sent to the Approving Officer overnight. This email includes an attachment of the data in Draft Report format which they will use to perform their review.
 3. The Approving Officer should read the report and make sure that the financial data, % completed information (for example, the Scope of Works Items on the Contract record) and commentary is all accurate. If they would like to make changes, then they need to request that the Monitoring Officer makes these changes on their behalf, or they update the data in the Project Monitoring and/or Contract Monitoring records themselves.
 4. Once the Approving Officer is satisfied that all the information is accurate, then they need to go to the Monitoring Actions record, update the 'Monitoring Approved' button to Yes and select Save.
 5. This will trigger the final approved report to be sent to the RWM via email with the Approving Officer also cc'd in the email.
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