Welcome to today’s presentation:

**eRETA Advanced Course**

*September 24, 2019*

*The presentation will start at 1 pm Eastern*

**Note:** Phones are automatically muted during the presentation. You have the ability to send questions to your fellow attendees and our presentation team via your Chat pane. Our team will answer as many of the questions as possible throughout and at the end of the presentation. All questions will be captured, and answers sent to all participants prior to the next presentation.
external RWA Entry and Tracking Application (eRETA)

*eRETA Advanced Course-*

*In eRETA, How Do I...?*

September 24, 2019

**Presented by:**
Steve Sacco
Reimbursable Services Program Manager
GSA-PBS Project Delivery Excellence Division
Office of Design & Construction

**Hosted by:**
Rebecca Hood
Customer Relationship Specialist
PBS Great Lakes Region (R5)
Client Enrichment Series

Using eRETA to send RWAs and RWA Work Requests is going to become MANDATORY October 1, 2019 (Beginning FY2020)

We have an extensive outreach and training program developed that will allow preparation time to enable our customers to institute this new process.

Come back to either eRETA session as often as you like, or tell a peer about our events:

- **eRETA Overview (Basics)**
  
  *Tuesday, October 8th 2019 1pm-3pm Eastern* [Register Now]

- **In eRETA, How Do I...? (Advanced)**
  
  *Thursday, October 24th 2019 1pm-2:30pm Eastern* [Register Now]
  
  (attending “eRETA Overview” and gaining eRETA access is advised prior to attending this session)

A host of resources, guides and training videos are available online at:

[www.gsa.gov/ereta](http://www.gsa.gov/ereta)
Today’s Topics

- **eRETA Website and Access**
- **Work Request Workflow**
- *Understanding the eRETA Searches and a walkthrough of all search fields*
- **Four RWA Amendment Input Codes**
- **Component Treasury Account Symbol (TAS) Format and “My Favorites”**
- **Multiple Funding Strings and the “Line to Bill” Feature**
- **Digital Signature Recap**
- **Open Q&A**
Gaining Access and Training Materials

www.gsa.gov/ereta

eRETA RWA Customer Portal

How Do I Access eRETA? | eRETA Training Materials

New Digital Features Now Available in eRETA

We are very excited to announce that in May 2017, the General Services Administration, Public Buildings Service (GSA-PBS) enhanced its Reimbursable Work Authorization (RWA) intake process by offering an electronic alternative to several existing manual processes.

These new features include:
1 – Customer Action - Customer enters Work Request (WR) information

2 – Customer Action – Customer sends WR to GSA

3 – GSA Action – GSA assigns PM/POC to project or service

4 - Jointly – GSA PM/POC and Customer develop requirements (scope, estimates, schedules, etc)

5 – Customer Action – Customer enters remaining WR information (equal to page 1 of RWA Form) and send to GSA

6 – GSA Action – GSA enters GSA-specific information (equal to page 2 of RWA Form)

7- GSA Action – GSA routes for digital signatures

8 – Jointly – Once the Customer and GSA sign, the RWA is accepted
eRETA Search Tips and Tricks

- Multiple search criteria means eRETA will search for all records that match ALL criteria entered
- The “little person” icon auto-populates your name in the User ID field
- Hyperlinks on the searches and throughout eRETA open up the Glossary definition for that term
  - Customer ID - searches for records that have the matching data in the “Requisition ID”, “Customer Order Number”, “Agency Accounting Data”, or the “Brief Project Description” fields
- “Pending Action” filter allows you to locate WR/RWAs awaiting your action and attention
Magnifying glass icons open search windows for the search criteria in question
eRETA Search Export to Excel

- Export to Excel of any search provided additional data that cannot be displayed on screen (due to space limitations)
- The Financial Review Export to Excel is one of the most widely used, supplementing data you might pull from other GSA websites (i.e. the PBS Customer Dashboard).
When do I need an amendment?

- If GSA entered the RWA before eRETA and you want to correct or add any missing data
- You need to cancel the RWA after acceptance due to priority changes in your organization
- You need to add funding to an RWA

Four Amendment Types:

- E-input code: Customer Administrative Change - direct submission to Pegasys
- H-input code: Billing Change
- N-input code: Cancel/Early Completion
- X-input code: Amount and/or Scope Change
Depending on the “Input Code” selected, certain fields are editable and others are disabled (grayed out).

E-input code amendments can be submitted immediately to GSA’s Financial Management System. Other require GSA review and approval.
Treasury Account Symbol (TAS) and “My Favorites”
Treasury Account Symbol (TAS) and “My Favorites” con’t

- Highlight the “star” icon to save a favorite TAS
- Instructions explain the exact “Component TAS” format required by Treasury and GSA billing system
- Use partial TAS code to run a search
- TAS search allows for both “Component” format and also “Two-digit year” format
Multiple Funding Strings and “Line To Bill” Feature

- GSA Billing system can only bill one (1) accounting line at a time
- E-input code can be used to change which line is billed
Capturing RWA Signatures

- The “Customer Approval” tab is where customers identify who will sign the RWA by selecting “Electronic Signature” and enter the email of the Fund Certifying Official - that’s it!

- The Fund Certifying Official will receive an email from “eSignLive” to apply his/her signature after GSA enters and verifies all information already entered in RETA/eRETA

- The “Send to GSA” button must be clicked to move the RWA towards acceptance. If not clicked, GSA will take no action and the RWA not be accepted.
Digital Signature Email and eSignLive

Hi Jane Doe,

Jane Doe has added you as a Signer to the e-SignPackage "RWA_F1643770_Mobile_AL_003".

Please click the "Sign/Review" button below to apply your digital signature to this RWA - a new tab or window will open.

Two actions are required:
1) Accept the "ESign Disclosures and Consent" document
2) Review the RWA 2957 Form and sign in the appropriate block

Below is a summary of the RWA to be signed.
Customer POC: Ksenia Petrakova, ksenia.petrakova@gsa.gov
GSA POC: Satish Nadipalli, satish.nadipalli.gs@encore.com
Building: FB/CT, PRO.
LOCATION TO BE DETERMINED, MOBILE, AL
Description: test
For more information, please contact the appropriate POC listed above.

Please review and sign this Document by scrolling and clicking on the "Click to Sign" or "Click to Initial" boxes as indicated by the yellow stickers.

The General Services Administration
1-800-480-3113 / DDSTeam@gsa.gov
www.gsa.gov
Questions?

- Lots of eRETA info available at www.gsa.gov/ereta
- Lots of RWA info available at www.gsa.gov/rwa
- eRETA System question? eRETA@gsa.gov
- General RWA question? AskRWA@gsa.gov
- Specific question on an RWA project or service?
  - Contact the regional RWA Manager (see map) or locate the GSA Project Manager email in eRETA
GSA PBS Reimbursable Services RWA Managers

Region 10
Michael Molnar
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Thank you for joining us today for a discussion on eRETA - “How do I...” Advanced Course

Training materials, including PDF User Guides and video recordings of previous training demonstrations, are available at:

www.gsa.gov/ereta

Questions?
Join us for our upcoming VIRTUAL CES sessions!

**eRETA Overview (Basics)**
Tuesday, October 8th 2019 1-3pm Eastern  [Register Now]
Tuesday, November 12th 2019 1-3pm Eastern  [Register Now]

**In eRETA, How Do I...? (Advanced)**
(attending “eRETA Overview” and gaining eRETA access is advised prior to attending these sessions)
Thursday, October 24th 2019 1-2:30pm Eastern  [Register Now]
Tuesday, November 19th 2019 1pm-2:30pm Eastern  [Register Now]

**Real Property Disposal Overview - Mission, Services and Opportunities**
Thursday, October 17th 2019 2-3pm Eastern  [Register Now]

Watch us on [YouTube](https://www.youtube.com)

Bookmark and binge watch all your favorite CES sessions!
[www.gsa.gov/ces](http://www.gsa.gov/ces)

clientenrichmentseries@gsa.gov