

## Client Enrichment Series – Q & A



**Topic:** *Entering and Submitting RWAs via eRETA*

**Dates of Presentation:** May 18 and May 31, 2017

**Link to Series Information:** [www.gsa.gov/ces](http://www.gsa.gov/ces) & eRETA site: [www.gsa.gov/ereta](http://www.gsa.gov/ereta)

**Q1) In many instances, customer agencies contact GSA to get a quote for work needed. Will they continue use the eRETA process for that?**

- A) Yes customer eRETA users will enter the initial work request in eRETA, and requirements development- which includes building out estimates- will begin from there.

**Q2) What if I don't have eRETA access?**

- A) You can begin the application process and gain access anytime. Please go to [www.gsa.gov/ereta](http://www.gsa.gov/ereta) and scroll down to “eRETA User Account Request Process”, where you’ll find detailed instructions on how to gain access. Additionally, you may email [ereta@gsa.gov](mailto:ereta@gsa.gov) for eRETA access issues.

**Q3) Should customers use the Work Request process to obtain a cost estimate?**

- A) Yes, customers will enter the Work Request in eRETA, and then GSA will be in contact with them to begin developing requirements such as building cost estimates, etc.

**Q4) I'm a little uneasy about providing the personal identifiers required in Step 2 of the eRETA user account request process. Why does that requirement exist?**

- A) That is an IT security requirement GSA is required to follow. The process is secure in that the PII information provided in Step 2 is exchanged from you to your personnel security office who then confirms it with the GSA personnel security office. Only folks with the appropriate clearance are seeing it, and certainly no one in our program office.

**Q5) How long does it typically take GSA to give customer eRETA users access to enter information directly into eRETA?**

- A) It depends if the user has access to eRETA already or not. If they already do, they simply need to email [eRETA@gsa.gov](mailto:eRETA@gsa.gov) to request that their account be “upgraded” to the Data Entry role. The change typically takes less than 24 hours. If they do not have access to eRETA, then the process will take a bit longer as they will need to go through the full three step application process outlined at [www.gsa.gov/ereta](http://www.gsa.gov/ereta).

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### **Q6) Should we use the legacy ab codes or current?**

- A) RETA only allows use of the five digit Agency Bureau Code format. For most federal customers, this is simply a leading '0' in front of the legacy four digit code.

### **Q7) Is RWA access based on Agency Bureau Code (ABC) or Billing Office Address Code (BOAC)? If it's the former, will that mean that everyone applying for District Court access will have access to RWA info for all District Courts across the country rather than their local court?**

- A) RWA Access is based on Agency Bureau Code (ABC). Yes, that is correct that anyone who is granted access to AB Code 12345 would then be able to review all RWAs for AB Code 12345 anywhere in the nation.

### **Q8) If a customer eRETA user is entering information on behalf of their agency's Project Manager, would GSA contact that PM with the cost estimates or other information needed?**

- A) Yes. Since the customer eRETA user enters their agency's PM in the "Customer Information" field, GSA's project team knows that individual is assigned as the customer PM for that project, and thus will be in communication throughout the project lifecycle and share needed documentation. GSA will also typically involve all POCs cited on the RWA in any communication. As such the eRETA data entry user who input the Work Request or RWA, the customer billing POC (optional), the Agency RWA Mailbox (optional), and the Fund Certifying Official may also receive communications from the GSA Project Manager as appropriate.

### **Q9) Do customer eRETA users need to input a Work Request to obtain an estimate? Must they specify they are requesting an estimate in the "Description of Requirements" block?**

- A) Customers will fill out all necessary fields on the customer information tab (including the description of requirements block), submit the request to GSA, and then GSA will be in contact with the customer project team to begin cost estimating. Customers will not need to annotate the need for an estimate in the description block, rather this will happen in the dialogue between the customer and GSA after submitting the work request.

### **Q10) Where can customer eRETA data entry users add a Scope of Work (SOW)?**

- A) If the project is smaller in scope, customers may add the Scope of Work (SOW) on the Customer Information tab as part of the "Description of Requirements" block. Alternately, for larger projects with a more detailed SOW, customers have the option to upload documents associated with the Work Request. After a customer submits a Work Request to GSA, they should see a yellow "Documentation" link in the lower left corner of the screen. If they click that, they will be directed to the "Documentation Detail" page where there is a button to "Upload New" documents. For more information customers can reference pg. 5 of the [Work Request User Guide](#) located at [www.gsa.gov/ereta](http://www.gsa.gov/ereta)

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### **Q11) Has GSA uploaded past RWAs into eRETA?**

- A) eRETA has all RWAs from as far back as 2006, so older ones are in there, though some of the early RWAs may not have as much robust information and documentation.

### **Q12) How long should customers allow for a response to a work request?**

- A) This will depend on a number of factors, but customers should expect a response from GSA regional POCs within several business days to start developing requirements.

### **Q13) Is there a way to restrict who is available to select under the "Agency POC" list? In other words, can a customer user designate a POC at their agency who can request someone to be added or removed from the list?**

- A) The names/emails listed under any POC pull-down menu are pre-populated based on whether that individual has been involved with at least one RWA in the past for the same customer agency (Agency Bureau Code) + GSA Building Number in the past. If a name you are looking for is not listed, select the "Add New" option and add the new name. If a name exists in the pull-down who no longer works for the agency or no longer handles RWA work, select his/her name in the pull-down and click on the magnifying glass icon to the right to open a pop-up window. From there click "Archive" to retire the person's name. Their name will no longer automatically show up in the pull-down menu unless someone later "un-archives" it.

### **Q14) Is there any way to have more than one Agency POC? For example, could there be a POC for approving the work and another to approve the financials?**

- A) Yes there is a customer billing POC and a customer project POC.

### **Q15) Is there a limit to the size of the document one can upload?**

- A) No, the system can accommodate very large file uploads.

### **Q16) What if the project is in multiple building numbers? How would a customer user enter the data?**

- A) The user could enter the primary building number (or simply choose one of them if none is the primary building) and then provide the others in the "Description of Requirements" field or in the "Additional Information" field of the *Customer Information* tab. When GSA fills out page 2 of the RWA form in RETA, they can then list the additional building sites there.

### **Q17) Has GSA considered making the BOAC a required field to ensure that invoices are properly routed in VCSS?**

- A) BOACs are required on the billing tab, so they are a required field for customers to enter.

### **Q18) Is the agency POC the same person that will approve the RWA financials?**

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- A) Not necessarily. The Agency POC could be someone like the Agency Project Manager, whereas the financial POC could be a Budget Analyst.

### **Q20) How should customers find out what their BOAC number is?**

- A) Customer users can use the magnifying glass next to the BOAC field to search for their particular BOAC. They could also contact GSA regional POCs who would likely know the answer as well.

### **Q21) Is this powerpoint available so that customers can share with others?**

- A) Since this was a live demonstration there is only a brief powerpoint. However, the Promo Guide and User Guides located at [www.gsa.gov/ereta](http://www.gsa.gov/ereta) provide an in-depth walk through of the application and follow the process just as Steve presented during the demo. The recording of this demonstration can be found at [www.gsa.gov/ces](http://www.gsa.gov/ces) as well as [www.gsa.gov/ereta](http://www.gsa.gov/ereta).

### **Q22) In the system, how do you make the document active or editable?**

- A) On the top right corner of the screen, there should be a "Read-Only" link or an image of a pencil. If the pencil image shows up, then the user is currently in "Read-Only mode" and would therefore click the pencil to go into "Edit" mode. Alternately, if the "Read-Only" link appears, then the user would click that link to back into "Read-Only" mode.

### **Q23) If a customer used the electronic signature, does the system send an email to the POC who is responsible for signing the RWA?**

- A) Yes the system will automatically send an email to the approving official to sign.

### **Q24) Can this system track what stage of the review the RWA is at?**

- A) Yes the customer can see what information still needs entered and the status in terms of the estimate, scope and other pieces of documentation.

### **Q25) How does a customer remove names from the drop-down list?**

- A) There is currently no option for the customer to "delete" users. If a customer agency really needs to delete someone, they could contact [ereta@gsa.gov](mailto:ereta@gsa.gov) and GSA's systems team could manually remove the contact.

### **Q26) Does the system time stamp the date of submission?**

- A) Yes, there is a time and date stamp of the submission.

### **Q27) Where can customers find the calculation of the overhead and mgmt fees?**

- A) Customers can find the management fee on the Summary Cost Estimate (SCE) worksheet which would be uploaded in RETA, and can reference the overhead

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calculator on the Reimbursable Services Program's website at [www.gsa.gov/rwa](http://www.gsa.gov/rwa) at the bottom of the "Billing and Payment" tab.

**Q28) What is the Input Code needed to make a dollar amount change?**

- A) X-Input Code

**Q29) Will GSA still issue closeout letters once work is completed and invoices are paid?**

- A) GSA will issue closeout once all costs of the work have been expensed and all reimbursements have occurred.

**Q30) Does the user guide cover all areas being shown today i.e. amendments, etc.?**

- A) There is a user guide available now at [www.gsa.gov/ereta](http://www.gsa.gov/ereta) for submitting RWA work requests in eRETA. The user guide for amendments is not currently available but will be available on [www.gsa.gov/ereta](http://www.gsa.gov/ereta) shortly!

**Q31) Will the POC be provided an email when the SCE is uploaded by the GSA PM?**

- A) All POCs identified will be updated as information is populated throughout the entire intake process.

**Q32) How many RWA types are there? Is there a document to reference what they are and their differences?**

- A) Yes customers can find a wealth of information regarding RWA types and other RWA-related info at [www.gsa.gov/rwa](http://www.gsa.gov/rwa). Located there is the Level I Introduction to Reimbursable Services Training as a PDF, along with dozens of FAQs covering the different RWA types and much more.

**Q33) If a customer has an estimate from GSA in eRETA already, can they link to that estimate on a new Work Request?**

- A) Yes, customers can link to estimates that GSA provided using the estimate tracking number which will start with "OU" or "SC". In fact, GSA highly encourages customers to enter the estimate number in the appropriate field on any new Work Request they send to GSA (located in the upper right corner of the 'Customer Information' tab). This will help to avoid the possibility of the GSA region mistaking the Work Request as a new unique project or service need separate from the project or service need identified by the estimate. Linking them as early as possible helps avoid possible duplication of RWAs in the system.

**Q34) Can customers access and amend the FY17 RWAs in eRETA now?**

- A) Customers can enter RWA Work Requests in eRETA right now, but they cannot make amendments at the moment. This will be available with the release of RETA 8.0 later this summer.

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**Q35) Will customers still be able to check the status of RWAs they did not enter into eRETA directly?**

- A) Yes, regardless of whether the customer or GSA entered the RWA in the system, customers can use eRETA for checking the status of all of their RWAs.

**Q36) Is the "Related RWA Number" field where customers would enter the internal project number? That field was on the "Customer Information" tab.**

- A) No, that field is specifically for other RWAs that have already been accepted that are related to this new work request in some form. Customers can enter their internal project number in the 'Customer Order Number' field on the 'Billing Information' tab.

**Q37) Regarding the customer information tab, will customers be able to fill it out once and save that information for future RWAs?**

- A) Not at this time, but that will likely be part of future enhancements. Customers will eventually be able to save them as "templates" so to speak.

**Q38) Suppose someone notices an error along the way...can the customer go back and make a correction?**

- A) Yes, if the Work Request or RWA has a status of "Unassigned", "Assigned", or "Pending-New", the customer agency can enter the pending WR/RWA in edit mode and make the appropriate corrections. If the RWA has already been accepted and has a status of "Submitted", the customer can initiate an amendment request by entering the RWA in edit mode and then selecting the appropriate amendment (E-input code, H-input code, or X-input code). For more on amendments, see the User Guide on "Entering RWA Amendments in eRETA" located at [www.gsa.gov/ereta](http://www.gsa.gov/ereta), or watch the recorded live demonstration on "Entering and Submitting RWAs directly into eRETA" (specifically from time marker 1:05 through 1:19).

**Q39) Is an edit an amendment?**

- A) Yes, any change to the RWA is considered an amendment. However, GSA makes a distinction between administrative amendments which are minor changes (e.g. correct incorrect data) versus substantive amendments (e.g. changing the funding source, authorized amount, or scope of work). Administrative amendments typically won't require new signatures. Substantive amendments will require both the customer and GSA to sign the RWA amendment.

**Q40) An amendment, e.g. adding additional funding, will require agency approval. Does this take into account additional signatures?**

- A) Yes, if funding information is changing, then GSA requires a new signature.

**Q41) Where is the updated RWA form located?**

- A) The updated form is located at [www.gsa.gov/rwa](http://www.gsa.gov/rwa).

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**Q42) Is there a review on the GSA side to confirm that the signed copy of the RWA (both customer and GSA signature) has been uploaded?**

- A) Yes GSA always confirms that the signed copy has been uploaded by sending the Acceptance Letter, which is automated by the system.

**Q43) There may be a couple days between funding amendment and approval signatures. Can customers save and re-enter where they left off?**

- A) Customers can save their progress in eRETA at any time and come back to it later.

**Q44) When will the Direct Data Entry feature be available?**

- A) It's available right now!

**Q45) Is there a way to request a close-out of an RWA in eRETA?**

- A) eRETA does not offer a way to request financial close-out of an RWA. Instead the best way to accomplish this is to reach out to the GSA team managing the RWA. In eRETA, when running the basic "Search", the search results include a column called "GSA User ID". This is a GSA RETA user who "manages" the RWA. Customers can email this person as a first level contact to see if the RWA is ready for financial close-out.