

Welcome to today's presentation:

eRETA's New Features and Enhancements

The presentation will start at *2:00 p.m. EDT*

Note: Please mute your phones upon connection to the webinar and/or bridge line. You will have the ability to send questions to the host and presenters through the webinar questions pane. Questions can also be sent to the clientenrichmentseries@gsa.gov mailbox. The presenter will answer as many of the questions as possible during the course of the presentation. All questions will be captured, including questions not responded to due to time limitations. Answers will be sent to all participants prior to the next presentation.



Client Enrichment Series

eRETA's New Features and Enhancements

Hosted by
Dawn Warner, Regional Account Manager,
GSA Region 8



Presented by
Steve Sacco, National Program Manager,
Office of Design and Construction,
Reimbursable Services Division,
GSA Central Office



GSA Public Buildings Service

eRETA History/Releases

- April 2011 (eRETA 1.0) – Customers have limited access to the “Documentation” search
- October 2015 (eRETA 7.0) – Read-only access extended to RETA Search, Financial Review, Data Entry screens, and Estimates; refresh of all eRETA screens
- May 2016 (eRETA 7.3) – Data entry rights to 25 customer agency SMEs to submit RWA Work Requests (WRs) and request amendments to existing RWAs online
 - Beta testing of new customer-to-GSA-to-customer workflow with live RWAs
- Winter 2016/2017 – Extension of data entry rights to all RWA customer agency bureaus and eRETA users; integration of digital signature solution and other workflow improvements as identified by beta users

NOTE: Customer access is restricted to the Agency Bureau Code level

Obtaining Access to eRETA

- Visit www.gsa.gov/ereta and complete the three step process
 - 1) Complete initial online application
 - 2) Submit the eRETA Clearance Verification Form and route it through your HR/Personnel Security and GSA's Personnel Security Office
 - 3) Receive "Welcome to eRETA" email and follow final instructions

Difference between eRETA and VCSS

- Ownership
 - eRETA was developed by GSA PBS' Reimbursable Services Division
 - VCSS was developed by GSA's OCFO and Office of Finance and is an extension of GSA Pegasys Financial Management System
- Access
 - eRETA bases access on Agency Bureau Codes (ABC) allowing users to further filter down by Billing Office Address Codes (BOACs/Account Codes
 - VCSS bases access on BOACs/Account Codes

Difference between eRETA and VCSS, con't

- Data provided
 - eRETA contains summary level information about RWA financials, project POCs, copies of documents (RWA 2957 forms, estimates, customer letters, etc.), and Excel reporting of financial data for all RWAs
 - VCSS contains copies of IPAC or non-IPAC RWA billing statements and Excel reporting of all bills
- Future features
 - eRETA 8.0 – preview after main eRETA demo
 - VCSS – automated email notifications when new bills are generated (deployed in Summer 2015)

eRETA 7.0 Live Demonstration

The following slides provide sample screenshots. However, for purposes of the live demonstration, the trainer will log into the live eRETA environment.

Screenshots are provided for participants logged in via audio only or for those viewing the slides after the live demo.

eRETA Welcome Screen

Current Date and Time:

Friday, April 15, 2016 12:10:08 PM

[Print/Save Report](#)

Note Board & User Resources

National RETA Note Board:	<p>Virtual eRETA training session – Thur 4/21 @ 2pm ET</p> <p>New eRETA enhancements now provide you with more than 4x the RWA data than before, creating greater transparency and easier tracking of work requests and amendments. New e-signature and submission of RWA forms are also on the horizon! Join GSA's RWA experts at our upcoming session to see how we are streamlining RWA interactions between our agencies at this month's Client Enrichment Series (CES) session. >>> Register at www.gsa.gov/ces</p>
Logged in User Details	
User ID:	steven.sacco@gsa.gov
Agency(ies):	01007 - JUDICIARY, UNITED STATES BANKRUPTCY COURT 01017 - JUDICIARY, UNITED STATES COURT OF APPEALS FOR THE FEDERAL CIRCUIT 07054 - DEPARTMENT OF HOMELAND SECURITY, TRANSPORTATION SECURITY ADMIN
Group(s):	ERETA_READ_ONLY_USER
Other Applications & Resources:	RWA Customer Site (www.gsa.gov/rwa) RWA Form 2957 (www.gsa.gov/forms) Small Projects and Reimbursable Services (SPRS) Division RWA Billing Details - Vendor & Customer Self Service (VCSS) (Separate log-in will be required) Treasury Credit Card Site (www.pay.gov) Rent on the Web (ROW)

eRETA Searches: RWA Search, Financial Review Search, Documentation Search

RETA RWA ENTRY & TRACKING APPLICATION steven.sacco@gsa.gov   

SEARCH FINANCIAL REVIEW DOCUMENTATION ESTIMATES

RWA Search Hide Criteria

<u>RWA Type</u> Select options 	<u>RWA Number</u> <input type="text"/>	<u>Closure Status</u> Select options
<u>RWA Status</u> Select options		<u>Organization Code</u> <input type="text"/> 
<u>Building Number</u> <input type="text"/> 	<u>Building Name</u> <input type="text"/> 	
<u>Primary Worksite City</u> <input type="text"/>	<u>Primary Worksite State</u> Select options	<u>Building Type</u> Select options
<u>Agency Bureau Code</u> 01007, 01017, 07054	<u>Agency Name/Bureau Name</u> <input type="text"/>	
<u>BOAC</u> <input type="text"/> 	<u>Severable Service</u> Select options	<u>Customer Funding Type</u> Select options
<u>PDN</u> <input type="text"/> 	<u>PCN</u> <input type="text"/>	<u>Customer ID</u> <input type="text"/>
<u>Authorized Amount from \$</u> <input type="text"/> to \$ <input type="text"/>	<u>Agency Accounting Data</u> <input type="text"/>	<u>User ID</u> <input type="text"/> 
<u>RWA Acceptance/Start Date</u> from <input type="text"/>  to <input type="text"/> 		

Search Results

Please enter at least one criterion above and click 'Search' to see results.

RWA Search Summary

You are in Read-Only Mode

 Form 2957
  Print

Financial information as of Pegasys last download: 04/15/2016 13:34 ET

<ul style="list-style-type: none"> RWA SUMMARY CUSTOMER INFORMATION BILLING INFORMATION ACCOUNTING DETAILS PBS INFORMATION AUTHORIZING DETAILS PBS APPROVAL 	<table border="0"> <tr> <td>RWA #:</td> <td>N1020979</td> <td>REXUS Lease Project #:</td> <td></td> <td>Acceptance/Start Date:</td> <td>07/07/2014</td> </tr> <tr> <td>Estimate Tracking #:</td> <td>SCID0705414190041</td> <td>Lease #:</td> <td></td> <td>Completed/<Cancelled> Date:</td> <td></td> </tr> <tr> <td>Work Site:</td> <td>ID4353ZZ</td> <td>Building Type:</td> <td>Leased</td> <td>Last Billed Date:</td> <td></td> </tr> <tr> <td>Building Name:</td> <td>SKYLINE</td> <td></td> <td></td> <td><Pending> Financial Term Date:</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>Financial Close-Out Letter Date:</td> <td></td> </tr> </table> <hr/> <table border="0"> <tr> <td>Agency Name:</td> <td colspan="5">DEPARTMENT OF HOMELAND SECURITY</td> </tr> <tr> <td>Bureau Name:</td> <td colspan="5">TRANSPORTATION SECURITY ADMIN</td> </tr> <tr> <td>ABC:</td> <td>07054</td> <td>PBS Office Symbol:</td> <td>10PSE</td> <td>Customer DUNS:</td> <td></td> </tr> <tr> <td>ALC:</td> <td>70110001</td> <td>Organization Code:</td> <td>P1070001</td> <td>Seller (GSA) DUNS #:</td> <td>130944296</td> </tr> <tr> <td>BOAC:</td> <td>703094</td> <td>Organization Name:</td> <td colspan="3">REAL ESTATE ACQUISITION DIVISION</td> </tr> </table> <hr/> <table border="0"> <tr> <td>Agency Fund Year:</td> <td>2015</td> <td>Overhead Rate:</td> <td>0.055364</td> <td>Treasury Symbol:</td> <td>07020152016 0550 000</td> </tr> <tr> <td>Agency Fund Type:</td> <td>M-Multi-Year</td> <td>Interfund PDN:</td> <td></td> <td>Requisition ID #:</td> <td>2114204RES365</td> </tr> <tr> <td>Exp Date Obl Auth:</td> <td>09/30/2016</td> <td>Interfund PLN:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Customer Order #:</td> <td colspan="5">3414204RES365 MOD1</td> </tr> </table> <p>Agency Accounting Data: 5 AV156A000D 2015 ADE020 GE0000 7700 6402 642RES 5903001403020000 3221 MOYERP <i>Customer funding information is as of the most recent submission; a history of customer funding is available under the 'RWA History' link.</i></p> <hr/> <table border="0"> <tr> <td>Accepted Authorized Amt:</td> <td>\$140,427.55</td> <td>Direct Costs:</td> <td>\$0.00</td> <td>Chargeback Amount:</td> <td>\$0.00</td> </tr> <tr> <td>Commitments:</td> <td>\$86,163.05</td> <td>Reg. Mgmt. Fee:</td> <td>\$0.00</td> <td>Bill Type:</td> <td>O-IPAC/IGTE</td> </tr> <tr> <td>Obligations:</td> <td>\$0.00</td> <td>Overhead Assessed:</td> <td>\$0.00</td> <td>Bill Term:</td> <td>M-Monthly</td> </tr> <tr> <td>Balance:</td> <td>\$54,264.50</td> <td>Total Billed:</td> <td>\$0.00</td> <td>Hold Billing:</td> <td>NO</td> </tr> <tr> <td>UFCO Balance:</td> <td>\$140,427.55</td> <td>Total Collected:</td> <td>\$0.00</td> <td>Last RETA Action:</td> <td>Submitted Successfully</td> </tr> <tr> <td>Earned Income:</td> <td>\$0.00</td> <td>Write-off Amount:</td> <td>\$0.00</td> <td>Service Type:</td> <td>Non-Severable</td> </tr> </table> <hr/> <table border="0"> <tr> <td>Last Obligation:</td> <td></td> <td>Last Financial Amendment:</td> <td>08/12/2015</td> <td>Last Admin Amendment:</td> <td>02/02/2016</td> </tr> </table> <hr/> <table border="0"> <tr> <td>Customer Contact:</td> <td>Paul Moyer</td> <td>GSA PM/POC:</td> <td>Julie Donaldson</td> <td>PBS Approving Official:</td> <td>James Phillip</td> </tr> <tr> <td></td> <td>571-227-1192</td> <td></td> <td>509-253-0566</td> <td></td> <td>509-353-0581</td> </tr> <tr> <td></td> <td>Paul.Moyer@dhs.gov</td> <td></td> <td>julie.donaldson@gsa.gov</td> <td></td> <td>James.Phillip@gsa.gov</td> </tr> </table> <hr/> <p>Description of Work: RWA TRN 6308; IDA On-Site; POP 6/30/2014-3/30/2015; OA#AID02082.6; TI Funds - Construction required for Break, Training and Admin Space. Paul Moyer - FRES POC Roger Grimes - GSA POC - 8/5/15 fund increase New POC Julie Donaldson</p>	RWA #:	N1020979	REXUS Lease Project #:		Acceptance/Start Date:	07/07/2014	Estimate Tracking #:	SCID0705414190041	Lease #:		Completed/<Cancelled> Date:		Work Site:	ID4353ZZ	Building Type:	Leased	Last Billed Date:		Building Name:	SKYLINE			<Pending> Financial Term Date:						Financial Close-Out Letter Date:		Agency Name:	DEPARTMENT OF HOMELAND SECURITY					Bureau Name:	TRANSPORTATION SECURITY ADMIN					ABC:	07054	PBS Office Symbol:	10PSE	Customer DUNS:		ALC:	70110001	Organization Code:	P1070001	Seller (GSA) DUNS #:	130944296	BOAC:	703094	Organization Name:	REAL ESTATE ACQUISITION DIVISION			Agency Fund Year:	2015	Overhead Rate:	0.055364	Treasury Symbol:	07020152016 0550 000	Agency Fund Type:	M-Multi-Year	Interfund PDN:		Requisition ID #:	2114204RES365	Exp Date Obl Auth:	09/30/2016	Interfund PLN:				Customer Order #:	3414204RES365 MOD1					Accepted Authorized Amt:	\$140,427.55	Direct Costs:	\$0.00	Chargeback Amount:	\$0.00	Commitments:	\$86,163.05	Reg. 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Navigate RWA Data Entry tabs

(RWA 2957 Form broken down across 6 screens)

You are in Read-Only Mode

RWA Type: N RWA Number: 1020979 RWA Status: Submitted

RWA SUMMARY

CUSTOMER INFORMATION

BILLING INFORMATION

ACCOUNTING DETAILS

PBS INFORMATION

AUTHORIZING DETAILS

PBS APPROVAL

Date of Request 07/09/2014

Agency/Customer BPN/DUNS []

Agency Bureau Code 07054

Agency Name DEPARTMENT OF HOMELAND SECURITY, TRANSPORTATION SECURITY ADMIN

Primary Work Site

Building Number ID4353ZZ

Building Name SKYLINE

Address 2140 N SKYLINE DR

City IDAHO FALLS

State Idaho

Zip Code 83402 - []

Agency Contact Information Paul.Moyer@dhs.gov

Contacts Phone (571) 227 - 1192 Ext []

Fax (571) 227 - 2906

Name Moyer,Paul

Title []

Address1 DHS TSA

Address2 601 South 12th Street

City Arlington

State Virginia

Zip Code 20598 - 6017

Description of Requirements RWA TRN 6308; IDA On-Site; POP 6/30/2014-3/30/2015; OA#AID02082.6; TI Funds - Construction required for Break, Training and Admin Space. Paul Moyer - FRES POC Roger Grimes - GSA POC - 8/5/15 fund increase New POC Julie Donaldson

Financial Review Summary

FINANCIAL SUMMARY

[← Back to RWA List](#)

Obligation and expense information as of VAT 105 Posted 04/15/16

[Print](#) [VCSS - Bill Search](#)

RWA: [N1020979](#) Construction Tls
RWA Status: Submitted Successfully
ETN: [SCID0705414190041](#)
Estimate Approval Date: 02/01/2016

REXUS Lease Project #:
Lease #:

Organization: P1070001 REAL ESTATE ACQUISITION DIVISION
Office Symbol: 10PSE
Worksite: ID4353ZZ SKYLINE 2140 N SKYLINE DR IDAHO FALLS ID 83402
GSA PM/POC: julie.donaldson@gsa.gov

Agency: 07054 DEPARTMENT OF HOMELAND SECURITY, TRANSPORTATION SECURITY ADMIN
Billing Office Address Code (BOAC): 703094 DEPARTMENT OF HOMELAND SECURITY, TSA

Acceptance/Start Date: 07/07/2014
Substantial Completion Date:
Cancellation Date:
<Pending> Financial Term Date:
Last Bill Date:

Total Billed: \$0.00
Chargeback Amount: \$0.00
Total Collected: \$0.00
Write-Off Amount: \$0.00

[RWA: 1020979](#) [RWA History](#) [Documentation](#) [ETN: SCID0705414190041](#)

▾ Authorizing Details Rollup

	Current Authorized	Commitments	Obligations	Balance	Expenses	UFCO
Construction/Const Support	\$127,943.00	\$86,163.05	\$0.00	\$41,779.95	\$0.00	
Design	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Security/Protection	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Space Changes	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Studies	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Utilities/O&M	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Total Direct Costs	\$127,943.00	\$86,163.05	\$0.00	*\$41,779.95	\$0.00	
RWA Fees	\$12,484.55	\$0.00	\$0.00	\$12,484.55	\$0.00	
Total	\$140,427.55	\$86,163.05	\$0.00	\$54,264.50	\$0.00	\$140,427.55

* Total Direct Balance is the amount available before or without Overhead Charges for the project manager to spend.



Documentation Summary

DOCUMENTS DETAIL

DOCUMENTS

Documents Detail

Financial information as of Pegasys last download: 04/15/2016 13:34 ET



RWA: [N1020979](#) Construction TIs **REXUS Lease Project #:**
RWA Status: Submitted Successfully **Lease #:**
Estimate Tracking Number: [SCID0705414190041](#)
Estimate Approval Date: 02/01/2016

Customer Information

Agency: 07054 DEPARTMENT OF HOMELAND SECURITY,
 TRANSPORTATION SECURITY ADMIN
Billing Office Address Code (BOAC): 703094 DEPARTMENT OF HOMELAND SECURITY, TSA
Customer POC Email: Paul.Moyer@dhs.gov
Customer Cert Official Email: Reinaldo.Junquera@dhs.gov
Customer Billing Contact Email: fin-smb-tsainvoices@uscg.mil

PBS Information

Organization: P1070001 REAL ESTATE ACQUISITION DIVISION **Office Symbol:** 10PSE
Worksite: ID4353ZZ SKYLINE
GSA PM/POC: julie.donaldson@gsa.gov

RWA Details

Acceptance/Start Date:	07/07/2014	Original Auth Amount:	\$93,941.88	Fund Year:	2015
Acceptance Letter Date:	08/12/2015	Current(Submitted) Auth Amount:	\$140,427.55	Fund Type:	M-Multi-year
Substantial Completion Letter Date:		Commitments:	\$86,163.05	Bill Type:	O-IPAC/IGTE
Close-out Letter Date:		Total Obligations:	\$0.00	Bill Term:	M-Monthly
Cancellation Date:		Total Expenses:	\$0.00	Overhead Billed Amount:	\$0.00
Last Bill Date:		Total Billed:	\$0.00	Chargeback Amount:	\$0.00
Financial Purge Date:		Total Collected:	\$0.00	Write-off Amount:	\$0.00
Hold Billing Indicator:	No				
Agency Accounting Data:	5 AV156A000D 2015 ADE020 GE0000 7700 6402 642RES 5903001403020000 3221 MOYERP				
Project Description:	RWA TRN 6308; IDA On-Site; POP 6/30/2014-3/30/2015; OA#AID02082.6; TI Funds - Construction required for Break, Training and Admin Space. Paul Moyer - FRES POC Roger Grimes - GSA POC - 8/5/15 fund increase New POC Julie Donaldson				

[RWA: 1020979](#) [RWA History](#) [Financial Review](#) [ETN: SCID0705414190041](#)



Access to Electronic Documentation

Select Page Size: 20 ▼

Documents

Document Type	Document Name	Last Modified By	Last Modified Date	Upload Date ▼	System ▲
Description					
Estimates	RETA ESTIMATE 2016-02-01 RETA Generated Estimate - SCID0705414190041	jenette.troberg...	02/01/2016	02/01/2016	
RWA 2957 Form	RETA 2957 FORM 2016-02-01 RETA Generated 2957 Form Submitted to Pegasys on 2016-02-01	jenette.troberg...	02/01/2016	02/01/2016	
Customer Correspondence (Email)	Acceptance Email	marnelle.devos...	08/12/2015	08/12/2015	
CL2 - Acceptance	Acceptance Letter	marnelle.devos...	08/12/2015	08/12/2015	
RWA 2957 Form	RETA 2957 FORM 2015-08-12 RETA Generated 2957 Form Submitted to Pegasys on 2015-08-12	joan.kostello...	08/12/2015	08/12/2015	
Estimates	RETA ESTIMATE 2015-08-12 RETA Generated Estimate - SCID0705414190041	joan.kostello...	08/12/2015	08/12/2015	
RWA 2957 Form	N1020979 Amendment	marnelle.devos...	08/10/2015	08/10/2015	
Customer Correspondence (Email)	Receipt Email	marnelle.devos...	08/05/2015	08/05/2015	
CL1 - Receipt	Receipt Letter	marnelle.devos...	08/05/2015	08/05/2015	
Customer Correspondence (Email)	Selected Documents Email	tina.vigorito...	07/15/2014	07/15/2014	

RWA Transactional History and Yellow Navigational Hyperlinks

Transaction History

History as of: 4/15/2016 RWA Number: N1020979

Created By: tina.vigorito@gsa.gov Created Date: 7/9/2014

Last Bill Date: Total Billed: \$0.00 Total Collected: \$0.00 Write Off Amount: \$0.00

[RWA: 1020979](#)
 [Financial Review](#)
 [Documentation](#)
 [ETN: SCID0705414190041](#)

History Records

Submission Date / Restored Date	Updated By	Authorized Amount	Customer Funding	ABC/BOAC	Input Code	Acceptance / Start Date	Com <Ca
Agency Accounting Data							
02/02/2016	jenette.troberg@gsa...	\$140,427.55	2015-M-2016	07054 / 703094	C	07/07/2014	
5 AV156A000D 2015 ADE020 GE0000 7700 6402 642RES 5903001403020000 3221 MOYERP							
08/12/2015	joan.kostello@gsa.go..	\$140,427.55	2015-M-2016	07054 / 703094	X	07/07/2014	
5 AV156A000D 2015 ADE020 GE0000 7700 6402 642RES 5903001403020000 3221 MOYERP							
07/15/2014	tina.vigorito@gsa.go..	\$93,941.88	2014-M-2015	07054 / 703094	X	07/07/2014	
5AV145A000D 2014 ADE020 GE0000 7700 6402 642RES 59030014030200000 3221							
07/14/2014	tina.vigorito@gsa.go..	\$93,941.88	2014-M-2015	07054 / 703094	A	07/07/2014	
5AV145A000D 2014 ADE020 GE0000 7700 6402 642RES 59030014030200000 3221							

.. Indicates a truncated field.

[Export to Excel File](#) [Cancel](#)



Access to Summary Cost Estimates and OT Utility Estimates

SUMMARY COST ESTIMATE

COSTS ASSOCIATED WITH CONSTRUCTION			
*TI Scenario: 4- Post Initial Occupancy, Owned Or Leased			
		GSA (Shell) Costs	Tenant (RWA) Costs
1. <u>E.C.C.A. (Estimated Cost of Construction at Award)</u>		\$0.00	\$127,943.00
2. <u>Construction Contingency:</u>	Choose Method		
	1- Percent of Line 1	0.00%	\$0.00
3. Estimated Construction Cost: (Line 1 + Line 2)		\$0.00	\$127,943.00
4. <u>Space Planning Cost</u> (Programming through Design Intent)		\$0.00	\$0.00
5. <u>Design:</u> (All costs associated with design narratives, models, calculations, specifications, construction drawings and cost estimates). Select cost method from menu and enter appropriate value in line 5	Choose Method		
	1- Percent of Line 3	0.00%	\$0.00
6. <u>Const.Mot. and Inspection:</u> Select from menu and enter appropriate value in line 6	Choose Method		
	Not Applicable	\$0.00	\$0.00
7. <u>Miscellaneous:</u> (identify)		\$0.00	\$0.00
8. <u>PBS Travel Associated with the TI Work (if applicable):</u>		\$0.00	\$0.00
9. Total Design and Const.Costs: (Lines 3 through Line 8):		\$0.00	\$127,943.00
10. <u>TI Allowance:</u>			\$0.00
11. <u>Amount of TI Allowance Customer Willing/Able To Buy Down In Excess of What Is Necessary:</u>			\$0.00
12. TI To Be Amortized In Rent			\$0.00
13. <u>Reimbursable Construction Cost:</u>			\$127,943.00
14. <u>Regional Management Fee:</u> (select fee method)	Choose Method		
	Standard 4% Fee Applies		\$5,117.72
15. Reimbursable Cost with Regional Mgmt.Fee:			\$133,060.72

Per PBS Pricing Policy, the Regional Management Fee is assessed on all amounts shown above in the 'Costs Associated with Construction' section; excluding the existence of a Pricing Deviation Waiver or work performed in a non-GSA managed facility (line 14).

ESTIMATE COST SUMMARY	
RWA Const.Costs	\$127,943.00
Regional Mgt Fee	\$5,117.72
Const.& Regional Mgmt Fee	\$133,060.72
Moving	\$0.00
Telephones	\$0.00
Furniture	\$0.00
IT	\$0.00
Security	\$0.00
Other	\$0.00
Labor	\$0.00
Reimbursable Personal Property Costs	\$0.00
Total RWA Direct Costs	\$133,060.72
Overhead	\$7,366.83
Total Est RWA Authorized Amount	\$140,427.55



The Future: Direct Data Entry and Digital Signatures

- May 2016 (eRETA 7.3) – Data entry rights to 25 customer agency SMEs to submit RWA Work Requests (WRs) and request amendments to existing RWAs online
 - Beta testing of new customer-to-GSA-to-customer workflow with live RWAs
- Winter 2016/2017 – Extension of data entry rights to all RWA customer agency bureaus and eRETA users; integration of digital signature solution and other workflow improvements as identified by beta users

Submitting Work Requests

The screenshot shows the 'Customer Information' form in the GSA system. The form is divided into several sections: CUSTOMER INFORMATION, BILLING INFORMATION, ACCOUNTING DETAILS, CUSTOMER APPROVAL, PBS INFORMATION, AUTHORIZING DETAILS, and PBS APPROVAL. The form contains various fields for entering customer and project details.

Customer Information

WR/RWA Number: W1483095 Customer Request Date: Requested By: Read Only View

Status: New Customer Signature: GSA Data Entry: Estimate Tracking No: [input field]

Input Code: A GSA Region: 01

*** Required Fields**

* Agency Bureau: 01005-Judiciary-District Courts Of The United States

* Primary Building State: Maine * City: Bangor

Building: ME0061ZZ Building Name: M.C. SMITH FB POCH

Address: 202 HARLOW ST Zip Code: 04401 - [input field]

This request is for multiple buildings (If this request is for multiple buildings, please explain in the Description of Requirements box)

Requested Service Period: [calendar icon] to [calendar icon] This work is related to other RWA(s)

* Estimated Amount: \$2,500-\$150,000 Related RWA Number(s): [input field]

* Agency POC: ryan_doil@med.uscourts.gov GSA PM/POC: (if known) kevin.morris@gsa.gov

Name: Doil, Ryan Name: Morris, Kevin

Phone: (207) 274-5107 Phone: (802) 528-4063

* Description of Requirements: Test description of requirements - for demonstration purposes only

(Limited to 500 Characters) Changes made above will simultaneously be made to the linked Estimate

Enter comments to provide additional information to GSA:

[input field]

Buttons: Delete, Save, Submit Request, Reset Form

- Data Entry Wizard allows customer to provide basic information to GSA about the requested project or service.
- A tracking “Work Request Number” is generated after the initial input.
- The Work Request is routed to the appropriate GSA region which will assign a Project Manager and Budget Analyst.
- Customer can fill out remaining RWA data elements (pg 1 of RWA form) before or while a GSA PM is assigned or if the RWA was done offline.

Tracking Work Requests

The screenshot shows a search interface for Work Requests and Request for Work Authorizations (RWAs). The title is "Work Request / RWA Search" with a "Hide Criteria" link on the right. The interface includes several search filters:

- WR/RWA Type:** Select options
- WR/RWA Status:** Select options (highlighted with an orange box). The dropdown menu is open, showing:
 - Work Request
 - New
 - Unassigned
 - Assigned
 - Cancelled
 - RWA
 - Pending New
- WR/RWA Number:** Text input
- Closure Status:** Select options
- Organization Code:** Text input with search icon
- Region:** Select options
- Building Number:** Text input
- Primary Worksite City:** Text input
- Primary Worksite State:** Select options
- Building Type:** Select options
- Agency Bureau Code:** Text input
- Agency Name/Bureau Name:** Text input
- Severable Service:** Select options
- Customer Funding Type:** Select options
- BOAC:** Text input
- PCN:** Text input
- Customer ID:** Text input
- Authorized Amount from \$:** Text input
- to \$:** Text input
- Agency Accounting Data:** Text input
- User ID:** Text input with user icon
- RWA Acceptance/Start Date from:** Date picker
- to:** Date picker
- Agency Contact Email:** Text input
- GSA PM/POC Email:** Text input

At the bottom right, there are three buttons: "Search", "Clear", and "Export to Excel File".

- Existing eRETA searches will be enhanced to allow customers to pull outstanding work requests (that are not yet RWAs).
- Like online ordering (e.g. Amazon), eRETA will provide a status with each submitted work request to indicate where in the workflow it currently sits.
- New statuses include when a work request is assigned to a GSA PM, when a response or action is required from the customer, and when the work request is ready to be signed to become an RWA.

Work Request/RWA Summary

The screenshot displays a web-based form titled "Customer Information". On the left, a vertical navigation pane contains several menu items: "CUSTOMER INFORMATION", "BILLING INFORMATION", "ACCOUNTING DETAILS", "CUSTOMER APPROVAL", "PBS INFORMATION", "AUTHORIZING DETAILS", and "PBS APPROVAL". The main content area is divided into sections for data entry. At the top, it shows "WR/RWA Number: W1483354", "Customer Request Date: 3/24/2016", and "Requested By: external.DataEntryUser@gsa.gov". Below this, there are fields for "Status: Assigned", "Customer Signature", "GSA Data Entry: emily.kaam@gsa.gov", "Input Code: A", "GSA Region: 02", and "Estimate Tracking No: OUNY0100515300008". A "Read-Only View" link is located in the top right corner. The form includes several dropdown menus and text input fields, with a "Generate" button next to the WR/RWA Number field. A "Required Fields" indicator is present. The "Agency Bureau" is set to "01005-Judiciary-District Courts Of The United States". The "Primary Building State" is "New York", and the "City" is "New York-Manhattan". The "Building" is "NY0130ZZ" and the "Building Name" is "THURGOOD MARSHALL US". The "Address" is "40 CENTRE STREET" and the "Zip Code" is "10007". There are checkboxes for "This request is for multiple buildings" and "This work is related to other RWA(s)". The "Estimated Amount" is "\$2,500-\$150,000". The "Agency POC" is "scott.teman@ca2.uscourts.gov" (Name: Teman, Scott; Phone: (212) 857-8721) and the "GSA PM/POC" is "brian.koehler@gsa.gov" (Name: KOEHLER, BRIAN; Phone: (212) 637-0127). A "Description of Requirements" text area contains the text: "This request is for multiple buildings (If this request is for multiple buildings, please explain in the Description of Requirements box)". At the bottom, there are buttons for "Cancel Work Request", "Save", "Save & Proceed >>>", and "Reset Form". A footer bar contains links for "Documentation", "Comments", and "ETN:OUNY0100515300008".

- As the Work Request is vetted and becomes an RWA, customers and GSA can view and update data through the various data entry screens (left pane).
- Customers will be responsible for entering all customer-related data (pg 1 of RWA 2957 Form).
- GSA will be responsible for entering all GSA-specific data (pg 2 of RWA 2957 Form).

Signing and Uploading RWA 2957 Forms

Customer Approval

WR/RWA Number: W1483354 Status: Assigned Input Code: A [Read-Only View](#)

Please complete this screen if entering a new RWA or processing an amendment that requires a new signature. * Required Fields

Step 1: Please print the RWA Form to be signed by the Fund Certifying Official

Print Form 2957

Step 2: Please complete the section below with the information from the signed RWA Form once the RWA has been signed by the Fund Certifying Official

Signature of Fund Certifying Official

Fund Certifying Official

Name of Signer

Certifying Official's Phone () - Ext

Date

I certify that the RWA has been signed by a Fund Certifying Official and either delivered to PBS or uploaded here on this page.

Step 3: Please upload relevant documents, including signed RWA (if applicable)

Document Type	Document Name	Upload Date	Delete
No records found			

[Documentation](#) [Comments](#) ETN.OJUNY0100515300008

- The new “Customer Approval” screen allows customer agencies to print out page 1 of the RWA 2957 Form inclusive of all the data they entered into RETA.
- Signing the RETA-generated 2957 Form and then uploading it back into RETA saves time and ensure the signed form isn’t “lost”.
- Future digital signature functionality will make this process even more seamless.

Amend and Update Existing RWAs

RWA Summary Page

Status: Submitted Successfully Last Modified By: eric.breece@gsa.gov Read-Only View Form 2957 Print

Input Code: Last Modified: 1/12/2016

Select Input Code: **Customer Administrative Change - E input code** Apply

Financial information as of Pegasys last download: 03/08/2016 07:43 ET

RWA #:	N1407851	REXUS Lease Project #:		Acceptance/Start Date:	10/01/2015
Estimate Tracking #:	SCTX0100515364007	Lease #:		Completed/Cancelled Date:	
Work Site:	TX1931ZZ	Building Type:	Leased	Last Billed Date:	
Building Name:	BENTSEN TOWER			<Pending> Financial Term Date:	
				Financial Close-Out Letter Date:	
Agency Name:	JUDICIARY				
Bureau Name:	DISTRICT COURTS OF THE UNITED STATES				
ABC:	01005	PBS Office Symbol:	7PSB-MC	Customer DUNS:	
ALC:		Organization Code:	F07250B1	Seller (GSA) DUNS #:	130943272
BOAC:	10752R	Organization Name:	BORDER SERVICE CENTER		
Agency Fund Year:	2016	Overhead Rate:	0.093336	Treasury Symbol:	
Agency Fund Type:	A-Annual	Interfund PDN:			
Exp Date Obl Auth:	09/30/2016	Interfund PLN:		Requisition ID #:	
Customer Order #:	txs 16467900018				
Agency Accounting Data: 16 092000 D05TXSC 2515 <i>Customer funding information is as of the most recent submission; a history of customer funding is available under the 'RWA History' link.</i>					
Accepted Authorized Amt:	\$8,193.29	Direct Costs:	\$0.00	Chargeback Amount:	\$0.00
Commitments:	\$0.00	Reg. Mgmt. Fee:	\$0.00	Bill Type:	N-NonIPAC
Obligations:	\$0.00	Overhead Assessed:	\$0.00	Bill Term:	Q-Quarterly

- Customer agencies can initiate amendments or directly submit administrative changes directly to the GSA Database.
- Administrative changes include: updates to customer POCs, add Customer Order Number, FPDS codes, DUNS number, and more.
- Other amendments require GSA review and in cases of scope change or dollar changes, a new RWA 2957 Form will need to be signed.

eRETA Questions

Contact us at eRETA@gsa.gov

Find out more at www.gsa.gov/ereta

BAAR/VCSS Questions

For more on the overall BAAR project go to

www.gsa.gov/baar

To access bills in VCSS go to vcss.gsa.gov

For VCSS Assistance contact ocfoservicedesk@gsa.gov

or 866-450-6588



Questions?

Thank you for joining us today for a discussion on
eRETAs New Features and Enhancements

Future sessions

- June 16 - Automated Advanced Acquisition Program (AAAP).

www.gsa.gov/ces

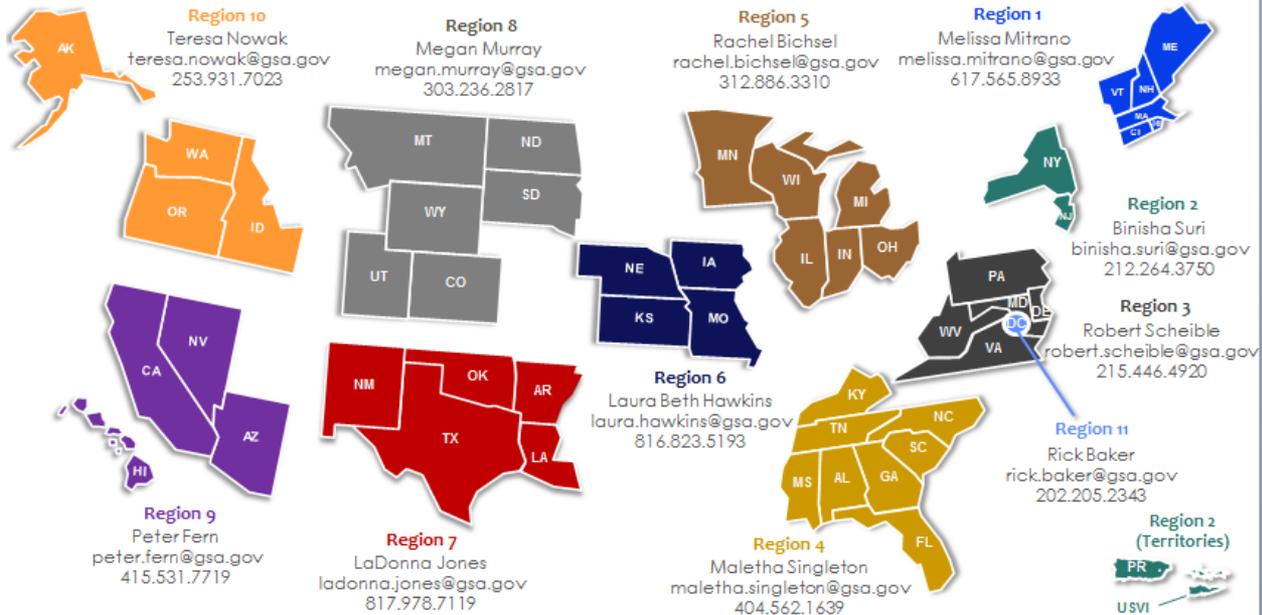
ClientEnrichmentSeries@gsa.gov

Regional RWA Program Managers



PBS Office of Project Delivery

GSA PBS Reimbursable Services RWA Managers



Project Delivery Excellence Division
 Keith Colella
 Director
 202.501.6193





Thank you!