PBS Client Enrichment Series
Special Event

eRETA Boot Camp - Using GSA’s New Electronic RWA Tools
the presentation will start at 1:00 PM Eastern

Note: Phones are automatically muted during the presentation. You have the ability to send questions to the host and presenters through your “Chat” pane. Our Subject Matter Experts will answer as many of the questions as possible throughout the presentation. All questions will be captured, and formal Q&A will be posted on our Client Enrichment Series website, www.gsa.gov/ces
eRETA Boot Camp - Using GSA’s New Electronic RWA Tools
external RWA Entry and Tracking Application (eRETA)

January 9, 2018

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

Hosted by:
Eric Fulton
National Program Manager, Customer Outreach and Communications
GSA-PBS Customer Programs Division
Office of Portfolio Management and Customer Engagement
RETA/eRETA stands for “RWA Entry and Tracking Application” – GSA’s electronic repository for all RWA projects.

RETA/eRETA is technically one application; the primary differences are:

- Logging in (internally vs externally)
- RWAs that are accessible (customers by AB Code, GSA by GSA Region)

RETA/eRETA contains all RWA financial information as well as an electronic document file that includes copies of the RWA 2957 form, Receipt, Acceptance, Completion and Closeout letters, and much more.

RWA Financial Information in RETA is updated 3x a day from GSA’s Financial Management System.
1. **April 2011 (eRETA 1.0)** – Introduction of customer RWA with basic financial summary and documents

1. **October 2015 (eRETA 7.0)** – Read-only access extended to RETA Search, Financial Review, Data Entry screens, and Estimates; refresh of all eRETA screens

1. **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
   a. Beta testing of new customer-to-GSA-to-customer workflow with live RWAs

1. **May 2017 (eRETA 7.7)** – 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

1. **August 2017 (eRETA 8.0)** – Additional automated email notifications and new “Summary of Requested Changes” screen to identify changed fields on amendment submissions
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:
Electronic RWA Enhancements

- On May 5th, 2017, GSA introduced several new electronic features to the RWA workflow to allow customer agencies and GSA to interact more efficiently. On August 5th, 2017 we added even more.

- The new features include:
  1) Data entry capabilities that allow RWA customer agencies to identify and submit new project or service needs (known as "RWA Work Requests"),
  2) Data entry capabilities that allow RWA customer agencies to enter and submit new and amended RWAs directly to GSA via the eRETA application,
  3) A “Summary of Requested Changes” screen to easily compare old and new values on RWA amendments,
  4) An integrated digital signature solution.

- Features 1-3 require eRETA access. Feature 4 only requires an email address.

- These features are all optional, but highly encouraged.
How does Customer Direct Data Entry work?
- Customers can submit new project or service needs (called RWA “Work Requests”) directly to GSA online in under 60 seconds
- The Work Request is routed to the appropriate GSA regional office who will review the request and assign a GSA Project Manager.
- Once requirements development and cost estimating occur between the customer agency and GSA offline, the customer can return to eRETA and build on the Work Request by entering the rest of their RWA information (equivalent to page 1 of the RWA 2957 Form)

Digital Signatures
- Optional for Customer Agency Fund Certifying Official (block 18A), but required for GSA-PBS Approving Official (block 28A)
- eRETA access is NOT needed to use digital signatures
- GSA will route the RWA for digital signatures just prior to acceptance
eRETA Adoption as of Today...

- **1011 total eRETA Users**
  - 867 with *Read Only* Access, meaning users can view RWA documentation, summary and financial info, estimates, export RWA data to Excel, etc.
  - 114 with *Data Entry* Access, meaning users have all functionalities mentioned above, plus the ability to create and amend RWAs and RWA Work Requests in eRETA.

- **Benefits of Using Data Entry**
  - RWAs can no longer get “lost” since requests are saved in the system.
  - Customers enter their own information, so there is less “back and forth” between customer and GSA.
  - Increases efficiencies due to automated routing of RWAs to appropriate GSA regional POCs.
  - Increased transparency for customers due to automated communications to customer contacts (Agency POC, Agency RWA Mailbox, Last modified by User)
eRETA Welcome Screen

Current Date and Time:  Friday, April 15, 2016 12:10:08 PM

Note Board & User Resources

National RETA Note Board:
Virtual eRETA training session – Thurs, 4/21, 2pm ET

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

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):
ERE_TA_READ_ONLY_USER

Other Applications & Resources:
RWA Customer Site (www.gsa.gov/era)
RWA Form 2357 (www.gsa.gov/forms)
Small Projects and Reimbursable Services (SPRS) Division
RWA Billing Details - Vendor & Customer Self Services (VSSS) (Separate log-in will be required)
Treasury Credit Card Site (www.gsa.gov)
Rent on the Web (ROW)
### eRETA Navigation and Search Screens

#### eRETA Work Request / RWA Search

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<tr>
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<th>Options/Values</th>
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<tr>
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<td>GSA PM/OIC Email</td>
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#### Search, Data Entry, Financial Review, Documentation, Estimates

- **Search**
- **Data Entry**
- **Financial Review**
- **Documentation**
- **Estimates**

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**GSA Public Buildings Service**
RWA Search Summary

Financial information as of Pegasys last download: 04/16/2016 13:34 ET

RWA #: N1620979
REXUS Lease Project #: 825097654/14960341
Acceptance/Start Date: 07/07/2014
Completed/Canceled Date:
Last Billed Date:
Financial Term Date:
Financial Close-Out Letter Date:

Agency Name: DEPARTMENT OF HOMELAND SECURITY
Bureau Name: TRANSPORTATION SECURITY ADMIN
ABC: 07064
PBS Office Symbol: P1070031
Customer DUNS #: 101209964
Organization Code: REAL ESTATE ACQUISITION DIVISION
Organization Name:

Agency Fund Year: 2015
Agency Fund Type: M-Month-Year
Exp Date CID Auth: 05/03/2016
Interfund PON: 34420401
Interfund Pl#: 34420401
Requisition ID #: 016420883995

Customer Contact: Paul Moyer - PM/MOC:
PMB: 1070061
571-227-1192
Paul.Moyer@hq.dhs.gov

GSA PM POC:
Julie
Donaldson
500-235-0598
julie.donaldson@gsa.gov

PBS Approving Official: James Phillips
500-235-0598
James.Philips@gsa.gov

Description of Work:
RWA TRN 6306, IDA On-Site, PO: 6/28/2014-3/06/2015, O&A/AID23266.6; TR Funds - Construction required for Break, Training and Admin Space; Paul Moyer - TRS POC Roger Orlinski - GSA/PDC - SHEF fund Increase New POC: Julie Donaldson

Customer Accounting Data: 5/15/14 0000 6000 9700 6402 6425 856 3031 1403 2000 9923 3221 MOYER
Customer funding information is as of the most recent submission, a history of customer funding is available under the RWA History link

Accepted Authorized Amt: $140,427.56
Direct Costs: $86,103.05
Reg, Mgmt. Fee: $0.00
Bill Type: O/PAC/R biting

Obligations: $0.00
Overhead Assessed: $0.00
Bill Term: M-Monthly
Hold Billing: NO

Balance: $51,224.50
Total Billed: $0.00
Last RFA Action: Submitted Successfully

UFCCO Balance: $140,427.56
Total Collected: $0.00
Service Type: Non-Severable

Earned Income: $0.00
Write-off Amount: $0.00

Last Obligation:

Last Financial Amendment: 08/12/2015
Last Admin Amendment: 02/02/2016

Form 2957  Print
Navigate RWA Data Entry tabs
(RWA 2957 Form broken down across 7 screens)
Financial Review Summary

GSA Public Buildings Service
## Access to Electronic Documentation

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RWA Transactional History and Yellow Navigational Hyperlinks
Access to Summary Cost Estimates and OT Utility Estimates

SUMMARY COST ESTIMATE

1. E.C.C.A. (Estimated Cost of Construction at Award)
   - GSA (Shell) Costs: $127,943.00

2. Construction Contingency
   - Choose Method: 1-Percent of Line 1, 0.00%
   - Tenant (RWA) Costs: $0.00

3. Estimated Construction Cost (Line 1 + Line 2)
   - Tenant (RWA) Costs: $127,943.00

4. Space Planning Cost (Programming through Design Intent)
   - Tenant (RWA) Costs: $0.00

5. Design (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
   - Tenant (RWA) Costs: $0.00

6. Construction and Inspection
   - Choose Method: Not Applicable
   - Tenant (RWA) Costs: $0.00

7. Miscellaneous (Identify)
   - Tenant (RWA) Costs: $0.00

8. PBS Travel Associated with the TI Work (if applicable)
   - Tenant (RWA) Costs: $0.00

9. Total Design and Const. Costs (Lines 3 through Line 8)
   - Tenant (RWA) Costs: $127,943.00

10. TI Allowance
    - Tenant (RWA) Costs: $0.00

11. Amount of TI Allowance Customer Willing/Abel To Buy Down In Excess of What Is Necessary
    - Tenant (RWA) Costs: $0.00

12. TI To Be Amortized In Rent
    - Tenant (RWA) Costs: $0.00

13. Reimbursable Construction Cost
    - Tenant (RWA) Costs: $127,943.00

14. Regional Management Fee (select fee method)
    - Choose Method: Standard 4% Fee Applies
    - Tenant (RWA) Costs: $5,117.72

15. Reimbursable Cost with Regional Mgmt Fee
    - Tenant (RWA) Costs: $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).
Creating/Submitting RWA Work Requests

- Data Entry Wizard allows customer to provide basic information to GSA about the requested project or service.

- Required fields are marked by a red asterisk (*).

- A tracking “Work Request Number” is generated after the user clicks ‘Save’, which you will see on the next slide.
A tracking “Work Request Number” is generated after the user saves the request.
After submitting the request to GSA, the Work Request will have an ‘Unassigned’ status, meaning GSA is in the process of assigning a PM to the project/service.

Once GSA ‘Assigns’ a GSA PM to the WR, the customer may move on to following tabs. If the GSA PM is already defined, then the customer may move on to following tabs before GSA assigns the WR.
Once GSA assigns a PM, the customer receives an automated email notifying them of the assigned PM.

Customer now has access to all customer tabs in RETA (equivalent of page 1 of RWA Form 2957).

Requirements development and cost estimating should occur between GSA and customer offline.
Entering RWA Information (Billing Info)

- 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).
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

- The new “Customer Approval” screen allows customer agencies to upload manually signed 2957 Forms or opt to sign RWA digitally.

- Digital signatures are captured as the last two items immediately prior to RWA acceptance.

- The Fund Certifying Official will receive an email from “eSignLive” to apply his/her signature after GSA enters all of their “Page 2” information in RETA.
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 Petrikova, ksenia.petrikova@gsa.gov
GSA POC: Satish Nadipalli, satish.nadipalli.fr@rencore.com
Building: FB/CT, PROJ. LOCATION TO BE DETERMINED, MOBILE, AL
Description: test

For more information, please contact the appropriate POC listed below:
F1643770.
Amend and Update Existing RWAs

- Customer agencies can initiate amendments or submit administrative changes directly to the GSA Database without GSA concurrence.
- 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, new signatures will also be required.
With RETA 8.0 (Aug 2017) the new “Amendment Summary” tab helps the customer and GSA to easily identify what field(s) have been changed on the amendment request.
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
Regional RWA Managers

January 2018

GSA PBS Reimbursable Services RWA Managers

Region 1
Melissa Mitrano
melissa.mitrano@gsa.gov
617.365.8963

Region 2
Binisha Suri
binisha.suri@gsa.gov
212.522.4760

Region 3
Robert Scheible
robert.scheible@gsa.gov
215.446.4920

Region 4
Bob Christlanson
bob.chrstdllanson@gsa.gov
404.331.1054

Region 5
Rachel Blchsel
rachel.blchsel@gsa.gov
312.886.3310

Region 6
Laura Beth Hawkins
laura.hawkins@gsa.gov
814.852.8115

Region 7
LaDonna Jones
ladden.jones@gsa.gov
817.978.7119

Region 8
Megan Murray
megan.murray@gsa.gov
202.236.2817

Region 9
Peter Fern
peter.fern@gsa.gov
415.621.7719

Region 10
Michael Molinar
michael.molinar@gsa.gov
202.236.1563

Region 11
Rick Baker
rick.baker@gsa.gov
202.208.2648

Project Delivery Excellence Division
Keith Coletta
Director
202.208.3046

GSA
Thank you for joining us today for a discussion on **RWAs and RETA / eRETA Application’s new features**

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

**www.gsa.gov/ereta**

Our next Client Enrichment Series session will be **Financing Change - The PBS Consolidation Fund**

2/15 at 2:00 pm Eastern

**www.gsa.gov/ces**