Submitting RWA Amendments to GSA in eRETA

In this Quick Reference Guide we will preview how GSA customer agencies can enter and submit RWA Amendments to GSA in eRETA.

Last Revision: 12/23/2019

Background:
This user guide provides instructions and screenshots to show customer agency eRETA users how they can amend existing RWAs in eRETA. Clicking on hyperlinked fields throughout the application opens the “RETA/eRETA Glossary” in a pop-up window, which will provide the user with a definition of the term.

Using the magnifying glass symbol next to any eRETA field opens a “look-up” window to search for values specific to the field in question. If the magnifying glass has a yellow star next to it, you may use that to add/remove commonly used codes to/from the “My Favorites” window for quick selection.

External customers can access additional information at http://www.gsa.gov/ereta, and continue to email questions to eRETA@gsa.gov. Internal GSA employees should continue to access RETA information via the PBS Portal and email issues to RETAAdmin@gsa.gov.

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Need Access to eRETA?
Visit our website at http://www.gsa.gov/ereta and follow the simple application process. You can apply for data entry access or read only access in eRETA. If you have access, you can launch eRETA in the PBS external portal.

- **Read only access** allows you to view Work Request (WR) and RWA information.
- **Data entry access** allows you to view WR and RWA information, PLUS the ability to enter and send WR and RWA data to GSA. You will need data entry access in order to follow the steps outlined on this user guide. Importantly, if you have data entry access in eRETA, you can amend any RWA associated with your assigned Agency Bureau (AB) code(s), regardless of when (or by whom) the WR or RWA was originally created.
1) Search for your RWA

Once logged into eRETA, you will be taken to the Welcome Screen. Click on the Search screen to search for your RWA.

Sample eRETA Welcome Screen
1) Search for your RWA (cont.)

If you know the RWA Number, enter it into the **WR/RWA Number** field. You can also search using other filters shown below, such as **RWA Type**, **Primary Worksite City**, **Region** and much more. All eRETA searches use the AND operator so as you enter more search criteria, eRETA will limit the search to only WRs/RWA that match all of those criteria. Click on the desired WR/RWA in the search results.

Search for your existing RWA using the RWA Search screen.
2) Going into “Edit” Mode

In the upper right corner of the RWA Summary Screen, click the Edit (pencil) icon.

Click the Edit (pencil) icon to initiate an amendment and go into Edit mode.
3) Selecting the appropriate input code

A pull-down menu will appear. Choose one of the input codes depending on the amendment you are requesting. If unsure which input code to choose, see the brief descriptions below and/or visit the eRETA Glossary by scrolling to the eRETA “footer” at the bottom of the screen, clicking on “Glossary” and then navigating to the definition for “Input Code”.

- **E-input code (Customer Administrative Change)** *(see section 4)*: Allows you to change a number of fields on the various across all customer tabs, but does not allow changes to the Billing Type or Term, Agency Location Code (ALC), Billing Office Address Code (BOAC) and any funding information.

- **H-input code (Billing Change)** *(see section 5)*: Allows you to change the Account Code/BOAC, ALC and/or Billing Type or Term. H-input codes instruct GSA’s financial management system that all subsequent billing actions will bill the new codes and/or Billing Type or Term.

- **X-input code (Amount/Scope change)** *(see section 6)*: Allows you to change the Authorized Amount, Fund Year/Type/Expiration date, and Description of Requirements.

- **N-input code (Cancel/Early Completion)** *(see section 7)*: Allows you to cancel or request early completion of the RWA if the full scope is no longer needed.

**NOTE**: If an RWA is already financially closed and a termination date exists (see green box below), the RWA is no longer editable.
4) E-input code (Customer Administrative Change)

Navigate across the various tabs depending on the change you need. For example, if you need to change project information such as the Agency POC, navigate to the Customer Information tab. Grayed-out fields are not editable with the input code selected.

**NOTE:** Always click “Save” or “Save and Proceed” to save your changes. If you make a change without saving, your edits will not be saved.
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4) E-input code (Customer Administrative Change) (cont.)

As another example, if you need to change the Customer Order Number (an optional field that will show up on your billing statement), navigate to the Billing Information tab.

Use an E-input code to edit fields on the Billing Information tab such as the Customer Order Number.
4) E-input code (Customer Administrative Change) (cont.)

After editing the necessary fields, click “Save” or “Save and Proceed” and navigate to the Customer Approval tab. Click the “Submit to Pegasys” button to submit the amendment directly into GSA’s financial management system (called Pegasys). E-input code changes are the only customer initiated amendments that do not first require GSA review and approval. However they are also limited in what fields can be amended.

When finished making changes, navigate to the Customer Approval tab and click “Submit to Pegasys” to submit the administrative amendment to GSA.
5) H-input code (Billing Change)

Navigate to the Billing Information tab and make the necessary changes. In the example below, the customer is changing the Billing Term, Agency Location Code (ALC), and Billing Office Address Code (BOAC).

Use an H-input code to edit billing information.
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5) H-input code (Billing Change) (cont.)

After editing the necessary fields, click “Save” or “Save and Proceed” and navigate to the Amendment Summary tab*. This screen presents you with a Summary of Requested Changes which compares the before and after value of each field and highlights the fields that changed for quick visual identification. Review your changes, scroll to the bottom of the screen and click “Send to GSA” when ready. GSA will review the amendment before submitting to our financial management system.

*If changing funding information then new signatures are required; follow steps on pg. 13-14 as if you were submitting an X-input code.
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6) X-input code (Amount/Scope Change)

Navigate across the various tabs depending on the change you need. For example, if you need to change the scope of the RWA, navigate to the Customer Information tab and edit the Description of Requirements field.

Use an X-input code for a scope change such as a change to the Description of Requirements field on the Customer Information tab.
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6) X-input code (Amount/Scope Change) (cont.)

If editing the Authorized Amount and/or funding information, navigate to the Accounting Details tab (note: if editing the Authorized Amount on the Accounting Details tab, you must also edit it on the Billing Information tab).

Use an X-input code to change funding information.
6) X-input code (Amount/Scope Change) (cont.)

After editing the necessary fields, click “Save” or “Save and Proceed” and navigate to the Customer Approval tab. An X-input code requires new signatures, so you’ll need to update the Fund Certifying Official information with the email address that you wish to receive the digital signature email (if this will be the same email that previously signed, then you don’t need to update anything). After doing so, click “Save and Proceed” to move on to the Amendment Summary tab.

X-input codes require new signatures, so you must enter your signatory information in the Customer Approval tab.
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6) X-input code (Amount/Scope Change) (cont.)

The Amendment Summary tab presents a *Summary of Requested Changes* which compares the before and after value of each field and highlights the fields that changed for quick visual identification. Review your changes, scroll to the bottom of the screen, and click “Send to GSA” when ready. GSA will review the amendment and then route it for signatures.

Amendment Summary tab shows Summary of Requested Changes in blue and allows you to send the amendment to GSA.
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7) N-input code (Cancel/Early Completion)

Enter your justification why the RWA should be cancelled/completed early and click “Submit”.

Provide justification for cancelling / completing early and click “Submit”
8) “Amendment Summary” tab accessible at all times for all amendments

The “Amendment Summary” tab is now accessible at all times to all users (Read Only and Data Entry) for all RWAs that have been amended at least once. Furthermore, the “Amendment Summary” tab includes a drop-down of all amendments processed against the RWA to date.

NOTE: The “Amendment Summary” tab only shows the changes made on the first four customer data entry tabs. If a past amendment was a change to GSA only data (tabs 5-7) or the entry of a completion date or termination date, the “Amendment Summary” tab will show no changes between the Before and After columns since none of the customer centric data was changed on this amendment selected.

For Additional Questions the following resources are available:

- Navigate to http://www.gsa.gov/ereta for eRETA user guides (including this one) and FAQs
- Email the COPBSApp@gsa.gov with questions or issues about logging into the external Portal (effectively any part of the log-in process before getting into eRETA itself)
- Email us at eRETA@gsa.gov with questions about using or navigating eRETA (once inside the application itself)