RETA 9.18 Enhancements

In this Promo/User Guide, we will preview the new enhancements included with the RETA 9.18 release available to users starting **November 11th, 2024**

For additional RETA/eRETA questions, the following resources are available for…

GSA Employees:
- Visit www.gsa.gov/RWA or the Reimbursable Services National Program page on Insite
- Email us at RETAAdmin@gsa.gov for RWA and SCE questions or at OUET.help@gsa.gov for OUET questions

Customer Agencies (including non-PBS, internal GSA customers)
- Visit www.gsa.gov/ereta for eRETA training materials including user guides, video demos and more.
- Email us at eRETA@gsa.gov for all eRETA questions

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1.) Allow Customer eRETA Users to Request a Revised Summary Cost Estimate (SCE) if it Expires

Impact to:

Customers, GSA Summary Cost Estimators, GSA PM/POCs

What changed:

When an estimate expires in RETA, Customer eRETA Data Entry users now have the ability to transition responsibility back to GSA in eRETA and request GSA provide a revised estimate.

- Added a new pop-up warning message that allows Customer eRETA Data Entry users to request a revised SCE at the push of a button after the existing estimate has expired.
- The Message says:

  'The Summary Cost Estimate has expired. You cannot fund this Work Request (WR)/RWA and send it to GSA until an approved RETA estimate is linked to the WR/RWA. GSA can provide a revised estimate valid for another 90 days.

  Click 'OK' to send a request to the GSA PM/POC to review and approve the estimate. Click 'Cancel' to continue modifying the WR without requesting an updated estimate. You will be asked this question the next time you edit the WR.'

    - If the customer clicks 'ok', they receive a confirmation message and an automated email is routed to GSA. ([Details outlined in item 3 below](#)).
      - The pop up message and button will not be offered to the customer again unless/until the estimate expires again.
    - If the user clicks 'cancel', they will enter edit mode on their Work Request without notifying GSA.
      - The user will be presented with the same pop up message each time they log into the WR in edit mode until the button is either clicked, or the estimate is modified by GSA.

Why it changed:

SCEs expire after 90 days to ensure the costs are properly updated to current market pricing. This upgrade was rolled out in Spring 2024 and several features in RETA need to be updated to accommodate and make use of that new functionality.

This warning message will provide an automated way for the Customer eRETA data entry user to contact GSA, to request GSA take action on the expired estimate. Prior to this update, it required the user to manually email their GSA PM outside of the system, and did not transition the 'Pending Action' responsibility in RETA.
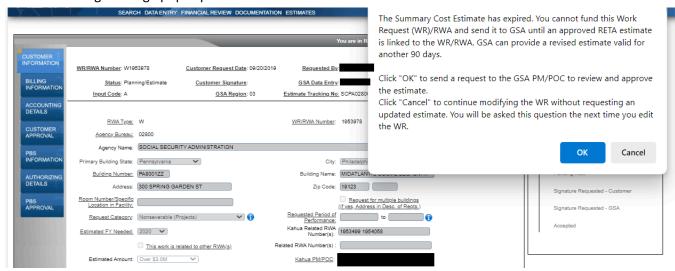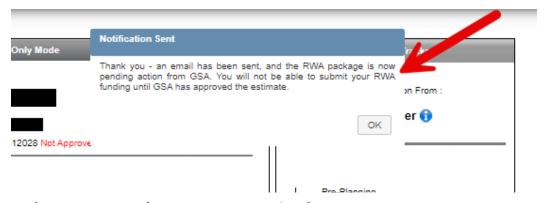
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How to use it:

(see screenshots on following pages)

- Customer eRETA Data Entry user clicks the Pencil Icon on any tab to enter edit mode on Work Request (WR) with expired SCE
- Warning Message pops up

The Summary Cost Estimate has expired. You cannot fund this Work Request (WR)/RWA and send it to GSA until an approved RETA estimate is linked to the WR/RWA. GSA can provide a revised estimate valid for another 90 days.

Click "OK" to send a request to the GSA PM/POC to review and approve the estimate.
Click "Cancel" to continue modifying the WR without requesting an updated estimate. You will be asked this question the next time you edit the WR.

Warning message displayed to Customer eRETA Data Entry user after entering edit mode

Notification Sent

Thank you - an email has been sent, and the RWA package is now pending action from GSA. You will not be able to submit your RWA funding until GSA has approved the estimate.

Confirmation pop-up after requesting SCE update from GSA

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2.) 'Pending Action' Changes

Impact to:

Customers, GSA Summary Cost Estimators, GSA PM/POCs

What changed:

Dynamically update the 'Pending Action' Tracker / Search results for the 'Pending Action' filter after the estimate expires, and when the customer requests an updated Estimate

- A Work Request (WR) in 'Planning / Estimate' status or 'Pending-New' RWA will be awaiting **Customer action** when:
    1. Customer has not clicked 'Send to GSA' (to send the fully funded WR/RWA to GSA for review) and the WR/RWA is linked to an Approved (not expired) Estimate OR
    2. The linked SCE has expired and the Customer has not yet requested an updated SCE from GSA in eRETA.
- A WR in 'Planning / Estimate' status or 'Pending-New' RWA will be awaiting **GSA action** when:
    1. Customer has completed Data Entry and clicked 'Send to GSA' OR
    2. The WR does not have a linked estimate OR
    3. The linked estimate has never been approved by GSA OR
    4. The linked estimate has expired and the customer has requested an updated estimate OR
    5. The linked estimate has expired and GSA has already started editing the expired estimate

Why it changed:

Prior to this change the 'Pending Action' tracker could not properly update to accommodate changes related to expired SCEs. This caused the RWA to incorrectly state the WR / RWA required action from one party when it really required action from another.

This upgrade will also allow GSA to correctly identify which WRs are effectively 'on hold'. WRs where the estimate has expired and the customer has not yet requested a revised estimate could be considered 'on hold' while the customer determines when or if they intend to fund the WR. When the customer does request an updated estimate, or GSA begins modifying the estimate, the GSA project team will be reengaged.

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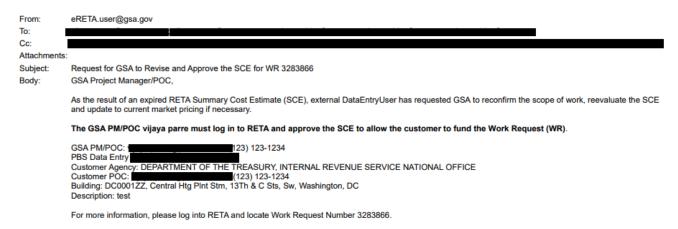## 3.) Automated Email After Customer Requests SCE Revision

Impact to:

GSA Summary Cost Estimators, GSA PM/POCs, Customers

What changed:

New email to communicate GSA action to revise an expired Summary Cost Estimate
- Send the email after the customer clicks the button (outlined in item 1 of this promo guide) to request an updated SCE
    - TO:
        - GSA Project Manager/POC
        - SCE GSA PM/POC
        - SCE Last Modified By
        - SCE Approver/Reviewer
        - GSA Data Entry Owner
    - CC:
        - eRETA user who clicked the button to request an estimate revision
        - WR Agency POC
        - Agency RWA Mailbox
        - GSA Regional Mailbox
- Save a PDF copy of the email to the documentation/audit section of the RWA within RETA

From:	eRETA.user@gsa.gov
To:	
Cc:	
Attachments:	
Subject:	Request for GSA to Revise and Approve the SCE for WR 3283866
Body:	GSA Project Manager/POC,

As the result of an expired RETA Summary Cost Estimate (SCE), external DataEntryUser has requested GSA to reconfirm the scope of work, reevaluate the SCE and update to current market pricing if necessary.

The GSA PM/POC vijaya parre must log in to RETA and approve the SCE to allow the customer to fund the Work Request (WR).

GSA PM/POC: (123) 123-1234
PBS Data Entry
Customer Agency: DEPARTMENT OF THE TREASURY, INTERNAL REVENUE SERVICE NATIONAL OFFICE
Customer POC: (123) 123-1234
Building: DC0001ZZ, Central Htg Plnt Stm, 13Th & C Sts, Sw, Washington, DC
Description: test

For more information, please log into RETA and locate Work Request Number 3283866.

Example of Request for SCE Estimate Revision Email

Why it changed:

To ensure that the correct groups are notified as soon as the customer needs a revised estimate, indicating the customer is ready to continue moving forward with an WR after the SCE has expired.

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4.) Disallow Creation of an SCE Before the Work Request (WR) is Assigned
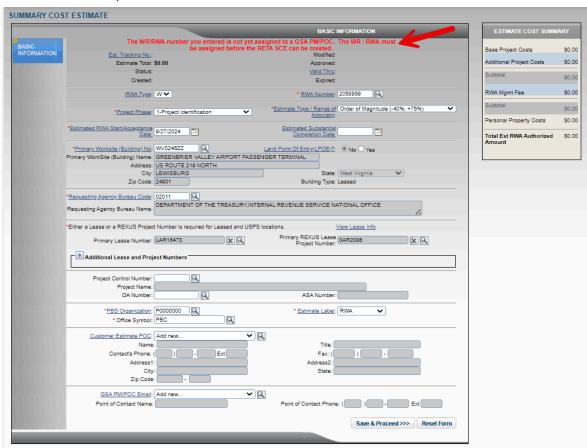
Impact to:

GSA Summary Cost Estimators, GSA PM/POCs, Customers

What changed:

Disallow creation of an SCE for a WR until a GSA PM is officially assigned. There have been no changes to OUEs.

Why it changed:

This validation will ensure that no automated communications can be skipped. In the rare scenario where an SCE was linked to a WR before a PM is assigned, the customer was able to complete all funding information and click 'send to GSA' early. When this occurred, the PM assignment email could not be sent, and the 'RWA sent to GSA for acceptance' email would appear as if GSA was sending the email to themselves. This created GSA and customer confusion, data inaccuracies and documentation inaccuracies.

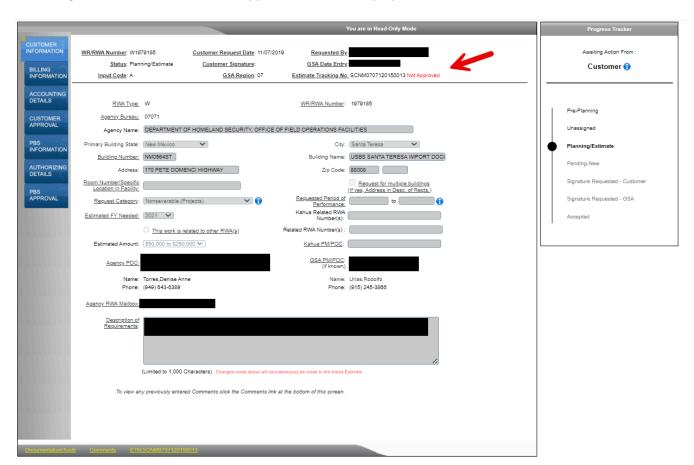*Error message when attempting to create an SCE for an Unassigned WR*

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5.) Display Estimate Approval Status on the WR / RWA

 Impact to:

Customers, GSA Summary Cost Estimators, GSA Overtime Utilities Estimators, GSA Data Entry Users
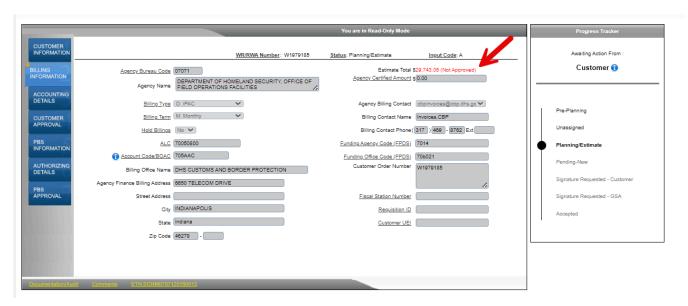
What changed:

The Approval status of the linked Estimate is now easily visible on the WR / RWA on the Customer Information and Billing Information Tabs. The 'Not Approved' status is displayed in red.

Estimate status Customer Information tab

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Estimate status Billing Information tab

Why it changed:

This change makes it explicitly clear that a user's estimate has not been approved or is expired. When combined with the ability for customers to automatically reach out to GSA SCE Estimators, this change eliminates confusion and increases the usability of the system.

END