Submitting RWA Amendments to GSA via eRETA

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

Background:

This user guide provides instructions and screenshots to show customer agency eRETA users how they can amend existing RWAs in eRETA. The blue hyperlinked fields open the "RETA/eRETA Glossary" in a pop-up window, which provides the user with a definition of the term. Use the magnifying glass 🔍 symbol next to any eRETA field to open 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.

This User Guide contains the following topics:

Submitting RWA Amendments to GSA via eRETA

1) Search for your RWA

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

Sample eRETA Welcome Screen

Submitting RWA Amendments to GSA via eRETA

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. Less is 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.

Submitting RWA Amendments to GSA via eRETA

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)* nor any funding information. These kinds of amendments will NOT require GSAs review or approval and will be fully saved and submitted once you have finalized the amendment.

- **H-input code (Billing Change)(see section 5):** Allows you to change the *Account Code/BOAC, ALC* and/or *Billing Type* or *Term*. All subsequent billing actions will bill the new codes and/or *Billing Type* or *Term*. These kinds of amendments will typically require GSA's review and approval.

- **X-input code (Amount/Scope change)(see section 6):** Allows you to change most information, including the *Authorized Amount*, *Fund Year/Type/Expiration date*, and *Description of Requirements*. These kinds of amendments will always require GSA's review and approval.

- **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. These kinds of amendments will require GSA to confirm there are no outstanding obligations to our contractors, and all financial information is reconciled, and therefore will require GSA's review and approval.

NOTE: If an RWA is already financially closed, the RWA is no longer editable.

Submitting RWA Amendments to GSA via eRETA

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.

Use an E-input code to edit fields on the Customer Information tab such as the Agency POC.

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. YOU MUST Click the "Submit to Pegasys" button to finalize the amendment. Any amendments left pending are subject to be deleted by GSA.

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.

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.

Amendment Summary tab shows Summary of Requested Changes in blue and allows you to send the amendment to GSA.

Submitting RWA Amendments to GSA via eRETA

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.

Submitting RWA Amendments to GSA via eRETA

6) X-input code (Amount/Scope Change) (cont.)

If editing the *Authorized Amount* and/or funding information, navigate to the Accounting Details tab. If editing the total *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.

Submitting RWA Amendments to GSA via eRETA

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. Click "Save and Proceed" to move on to the Amendment Summary tab.

X-input codes require new signatures.

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" to finalize the amendment and route the changes for GSA review. GSA will review the amendment and then route it for signatures.

Submitting RWA Amendments to GSA via eRETA

Amendment Summary tab shows Summary of Requested Changes in blue and allows you to send the amendment to GSA.

Submitting RWA Amendments to GSA via eRETA

7) N-input code (Cancel/Early Completion)

Enter your justification why the RWA should be canceled / completed early and click "Submit".

Provide justification for canceling / completing early and click "Submit"

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)