Work Request-RWA Workflow and Status Labels

All Work Requests (WRs) and RWAs have status labels in eRETA indicating their current state in the WR-RWA lifecycle. This Quick Tip will outline the WR-RWA workflow, how to identify WR/RWA status labels, and how to determine if the WR is pending GSA action or Customer action.

1- Work Request-RWA Workflow

Below is the WR-RWA workflow process. This process should begin as soon as a customer identifies a need for the project/service.*

Step	Event	Status
1	Customer enters WR information in eRETA and clicks "Save"	Pre-planning
2	Customer sends WR to GSA by clicking "Submit Request"	Unassigned
3	GSA assigns a Project Manager (PM) to the work	Planning/Estimate
4	GSA PM works with the customer (outside of eRETA) to finalize requirements, develop cost estimates, and a project schedule	Planning/Estimate
5	GSA creates, approves, and links an estimate to the WR	Planning/Estimate
6	Customer fills out remaining required information in eRETA and clicks "Send to GSA"	Planning/Estimate
7	GSA begins review of customer submission and consideration for RWA Acceptance	Pending-New
8	GSA routes RWA for digital signatures	Sig-Requested
9	Customer digitally signs the RWA	Sig-Requested
10	GSA digitally signs (accepts) the RWA and GSA sends Acceptance Letter to Customer POCs	Accepted

*Overtime Utilities follow a slightly different process. Please visit www.gsa.gov/ereta and navigate to the "eRETA Training Materials" page where you'll find a user guide titled "How to Create and Send Overtime Utility Requests via eRETA".

2- How to Identify WR/RWA Status Labels

Click any of the blue hyperlinks in eRETA to bring up the eRETA Glossary which provides definitions of various terms related to WRs/RWAs. If you need to find a term in the Glossary you can use CTRL+F and search for the term you're looking for.

Click any of the blue hyperlinks to bring up the eRETA Glossary of terms.

3- How to Determine if a WR/RWA is Pending GSA action or Customer action

To identify WRs/RWAs pending Customer or GSA action, navigate to the Work Request / RWA Search screen, move your cursor over the Pending Action dropdown, select "Customer" or "GSA", and click "Search" to bring up WRs/RWAs which are pending GSA action or Customer action.

Pending Action filter on the WR/RWA allows you to identify WRs/RWAs pending Customer or GSA action.

When **"GSA"** is selected, eRETA returns WRs/RWAs in one of the following statuses/positions:

- **Unassigned WR** (GSA must assign a PM)
- **Planning/Estimate, before an approved estimate is linked to the WR** (GSA must link an estimate to the WR)
- **Planning/Estimate, after Send to GSA button is clicked** (GSA must review and route for signatures)
- **Pending-New RWA, after Send to GSA button is clicked** (GSA must route for signatures)
- **Mod-Requested** (GSA must review amendment and, if applicable, route for signatures)
- **Pending-Mod** (GSA is now reviewing amendment and, if applicable, route for signatures)
- **Failed** (GSA must resolve issue preventing RWA from being submitted to GSA's financial management system)
- **Signature Requested, where Package Request Date is less than the current system date by 10 or more days** (GSA must follow up with the customer and/or GSA signer to see why RWA is still pending signature(s))

When **"Customer"** is selected, eRETA returns WRs or RWAs in one of the following statuses/positions:

- **Pre-planning** (customer must click "Submit Request" to send to GSA for assignment of a PM)
- **Planning/Estimate** (customer must finish data entry and click "Send to GSA" for RWA acceptance consideration)
- **Mod-Initiated** (customer must click "Send to GSA" for GSA review of amendment for acceptance consideration)

BONUS KNOWLEDGE: The "Electronic Signature Request" button on the Customer Approval tab must be selected before clicking the "Send to GSA" button. Be aware that your Fund Certifying Official will not receive the email to apply digital signature until GSA has reviewed the RWA, entered GSA-specific info, and routed for customer and GSA signatures. Please be aware that while the "Manual Signature" button still appears in eRETA right now, federal customers may not select it and any RWAs with it selected will not be considered for acceptance. The button will disappear in a future eRETA release.

DOUBLE BONUS KNOWLEDGE: Training, training and more training!
We will continue to offer two eRETA training sessions per month through the end of the calendar year and into the beginning of 2020: one overview session and one advanced session. Register by visiting www.gsa.gov/ces or by clicking the links below!

- **eRETA Basics - Overview Sessions**
  - December 3: 1-3pm (eastern)
  - January 7: 1-3pm (eastern)
- **eRETA Advanced - How do I...? Feature Focus Sessions** *(attending an Overview session and gaining access to eRETA are strongly encouraged prior to attending these advanced sessions)*
  - December 17: 1-2:30pm (eastern)
  - January 23: 1-2:30pm (eastern)