



In this Promo/User Guide, we will preview the new enhancements included with the eRETA 9.1 release available to users starting October 17th, 2020.

Summary of eRETA 9.1 Enhancements

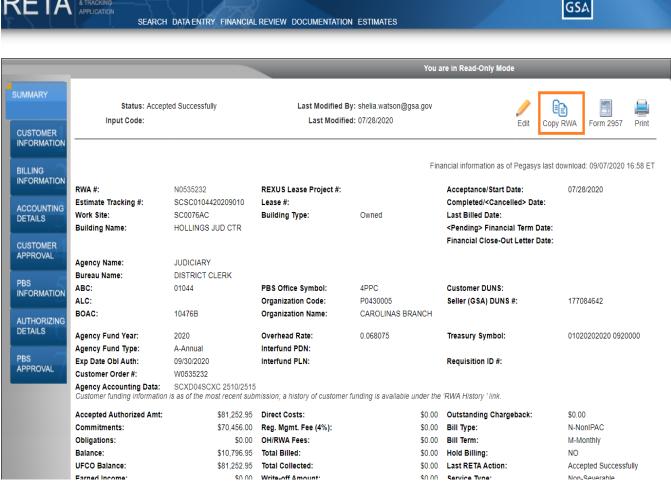
- 1. Copy an RWA or Work Request (including Cancelled WRs)
- 2. 'Micropurchase Delegation of Authority' pop-up on WRs below \$2000
- 3. Require New Signatures with any amendment over \$0.99
- 4. Update AC-15 (notification an SCE or OUE is linked to a WR) logic and template
- 5. Make OUC-0 the first official RWA Request to OT Utility customers
 - a. Suppress AC-15 in lieu of OUC-0 for initial OT Utility RWAs (A-input code)
- 6. Estimate Search Changes for SCEs and OUEs
- 7. Allow searching by Customer Estimate POC in Estimate Search
- 8. Allow searching for Estimates by the Signature Requested status





1) Copy an RWA or Work Request (including Cancelled WRs)

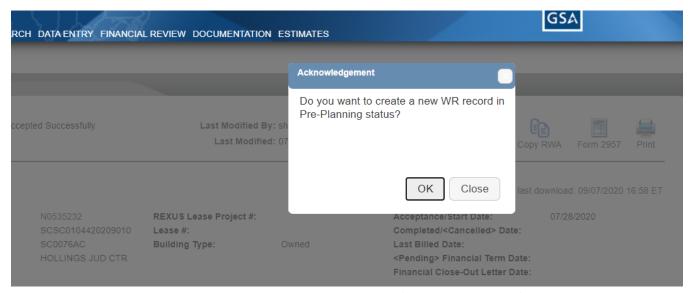
eRETA Data Entry users now can copy any existing WR or RWA (in any status, including cancelled WRs and pending amendments) within their assigned Agency Bureau Code(s). The Copy function will copy all data from the Customer Information page except for the GSA PM/POC, Estimated FY Needed, and Estimated Amount range. It will also copy all data from the Billing Information page except for the Agency Certified Amount. It will <u>not</u> copy any information from the Accounting Details page, Customer Approval page, PBS Information page, Authorizing Details page, and PBS Approval page. It will also NOT copy a link to the old Estimate or any documents, comments, or audit records.



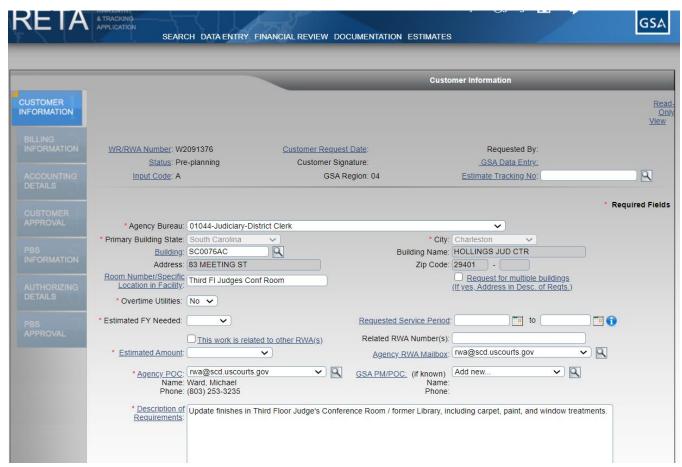
Copy RWA button allows users to copy information from an existing WR/RWA onto a new WR/RWA.







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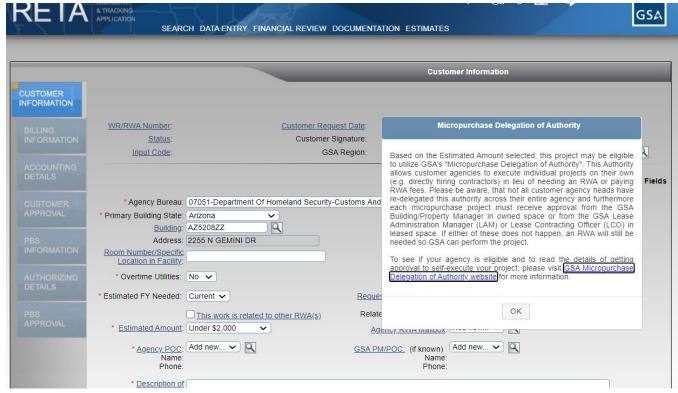
Copy RWA button allows users to copy information from an existing WR/RWA onto a new WR/RWA.





2) Micropurchase Delegation of Authority' pop-up on WRs below \$2000

Whenever a customer eRETA user selects an Estimated Amount of "Under \$2,000" on the Customer Information page for a Work Request, a pop-up will offer them the option to utilize GSA's "Micropurchase Delegation of Authority", which allows the customer to execute the work themselves without the need for an RWA. A link in the pop-up will direct them to the <u>Facilities Management</u> page for more information about using the Micropurchase Delegation of Authority and the qualification requirements to utilize the delegation. Alternatively the customer can choose to ignore the pop-up and continue to submit the Work Request with the intent of GSA performing the work as an RWA.



Customer eRETA users receive Micropurchase Authority pop-up when selecting Under \$2,000 in Estimated Amount field.



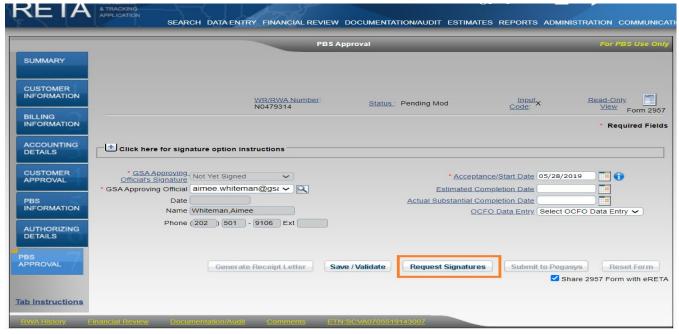


3) Require New Signatures with any amendment over \$0.99

Previously any amendment increasing or decreasing the authorized amount by a value greater than 10% or \$500 would require new signatures before being submitted to Pegasys (GSA's Financial Management System). Now, any amendment increasing or decreasing the authorized amount by \$1.00 or more will require new signatures.



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4) Update AC-15 (notification an SCE or OUE is linked to a WR) logic and template

Previously the automated notification that an estimate linked to a WR/RWA has been approved, was only generated on a Work Request or Pending-New RWA. There was no such notification in an amendment scenario (e.g. any change to an estimate linked to an already accepted RWA). With eRETA 9.1, the notification will also be triggered for any WR/RWA when the previously approved estimate is modified and approved with a new dollar amount. It will <u>not</u> be generated if the SCE is approved after making administrative changes (e.g. not changing the dollar amount). Also the text in the body of the automated email has been revised (see screenshot example below).

NOTE: AC-15 has been suppressed for Overtime Utility Work Requests. However, after we have accepted the Overtime Utility RWA and the linked estimate has been modified and approved, then AC-15 will be generated.

From: retaadmin@gsa.gov

To: tai.do@ssa.gov; tai.do@ssa.gov

Cc: derek.jarvis@gsa.gov;rick.gordon@gsa.gov

Attachments:

Subject: GSA has approved the estimate SCAK0280420288001 for WR/RWA 1916313

Body: GSA Customer,

GSA has approved Summary Cost Estimate SCAK0280420288001 linked to Work Request/RWA 1916313. You can now submit this New/Amended RWA to GSA in eRETA. To do so, you must enter all required fields in eRETA and then click the 'Send to GSA' button on the Customer Approval tab. GSA can take no additional action on this New/Amended RWA until you complete this step.

To review a copy of this estimate, click on the 'Estimates' search tab at the top of any eRETA screen and search for the Estimate Tracking Number listed above.

Should you have any questions regarding this estimate or RWA, please contact one of the GSA Representatives listed below:

Total Estimate Amount: \$124,300.00

GSA Project Manager: rick.gordon@gsa.gov, (253) 377-6595

PBS Data Entry User: derek.jarvis@gsa.gov

Customer Agency: SOCIAL SECURITY ADMINISTRATION Building: WA7774ZZ, Ssa, 151 Sw 156Th St, Burien, WA

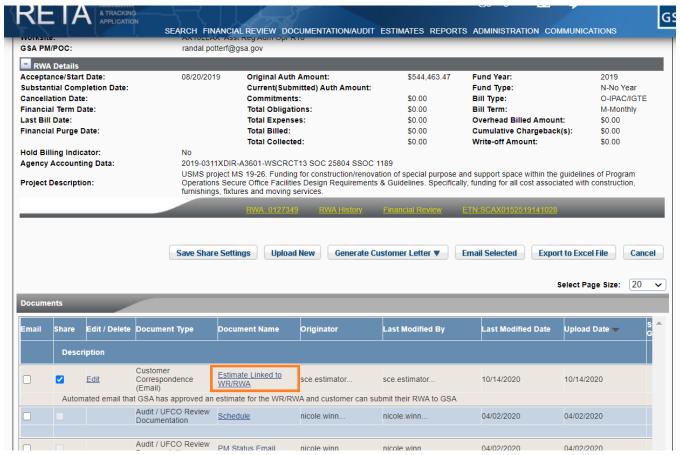
Description: The SSA Burien Office has an outdated LAN cabinets and we would like to replace it with the new standard LAN racks. Please provide Independent Government Estimate (IGE) as your earliest convenience. Let me

know if you have any questions. Thanks, Tai

AC-15 email example.







Documentation tool showing AC-15 is generated for accepted RWAs in addition to WRs and Pending-New RWAs.

5) Make OUC-0 the first official RWA Request to OT Utility customers and Suppress AC-15 in lieu of OUC-0 for initial OT Utility RWAs (A-input code)

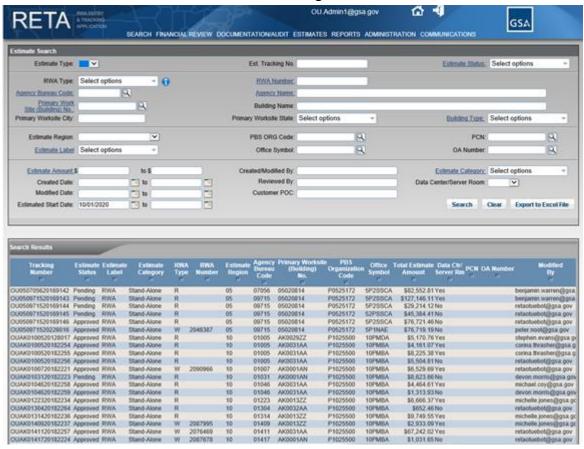
Instead of sending two customer letters to Overtime Utility customers in August and September asking them if they still have a need for repeat OT Utility services in the next fiscal year, eRETA will now only send one letter to the customer. The combined letter will ask them to verify the estimate provided and submit a Work Request if needed. Furthermore, since an OU Estimate has already been created at this point, eRETA will not send out the AC-15 notification (see item #4 above) when the initial WR and OUE are linked. AC-15 will be sent out after the OT Utility RWA is accepted if there is a subsequent amendment to the OUE and RWA.





6) Estimate Search Changes for SCEs and OUEs

The Estimate Search results have been modified to allow for 20 results to be displayed per page instead of the original 10 per page. The results will also default to sort by the Estimate Tracking Number and retain the order of the results during the user's session.



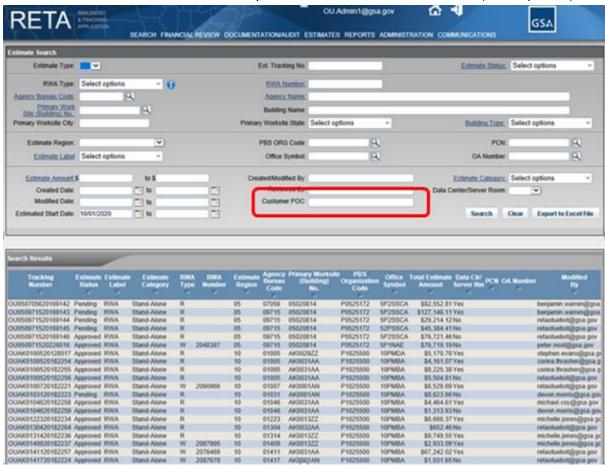
20 results displayed per page and sorted by ETN.





7) Allow searching by Customer Estimate POC in Estimate Search

eRETA will now allow users to search by the customer POC email address (full or partial).



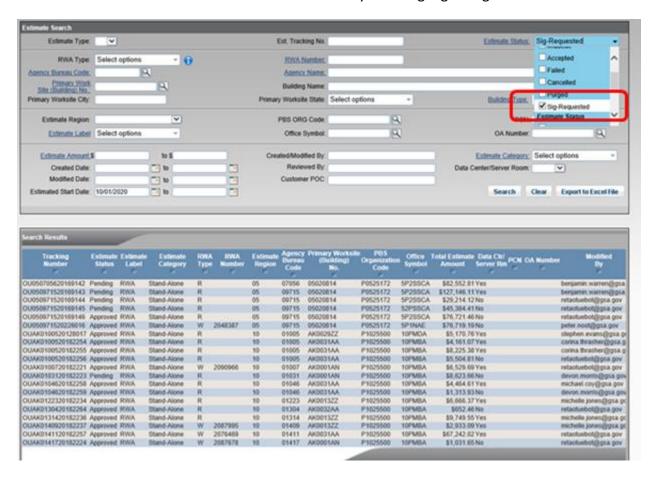
'Customer POC' now an option on the Estimates Search screen.





8) Allow searching for Estimates by the Signature Requested status

eRETA will now allow users to search for estimates with a status of "Signature Requested". This will return all estimates linked to an RWA that is currently awaiting digital signatures.



Signature Requested now an option in the "Estimate Status" dropdown on the Estimates Search screen.

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

GSA Employees:

- Log-in to the PBS Portal → select the RETA icon → Click on the "QRGs" tab
- Log-in to the PBS Portal → select the RETA icon → Click on the "Training" tab
- Email us at <u>RETAAdmin@gsa.gov</u> for RWA and SCE questions or at <u>OUET.help@gsa.gov</u> for OUET questions

Customer Agencies (including non-PBS, internal GSA customers)

- Visit <u>www.gsa.gov/ereta</u> for eRETA training materials including user guides, video demos and more
- Email us at eRETA@gsa.gov for all eRETA questions