

How to Create and Send Overtime Utility Requests via eRETA

In this Quick Reference Guide, we will preview how to create and send Overtime Utility Requests via eRETA. This guide is designed for external customers with Data Entry access and covers both cases where 1- There is *no* existing estimate in eRETA, and 2- There *is* an existing estimate in eRETA.

1) If you do not have an existing estimate in eRETA for the OU service, you can create an RWA Work Request (WR) by moving your cursor over the “Data Entry” dropdown and selecting “Create Work Request.” Enter all required fields (as denoted by a red asterisk), select “Yes” from the “Overtime Utilities” pull-down menu, and enter the requested service period. Also, be sure to select the appropriate “Estimated Fiscal Year (FY) Needed” for the service. If the services will occur in the current FY, select “Current”. If the services won’t occur until a later FY, select the appropriate FY.

Next, click the “Save” button located at the bottom right corner of the screen to generate a unique tracking number for your request. Lastly, click the “Submit Request” button to route the request to GSA. After hitting “Submit Request”, GSA will assign a Project Manager (PM) and create an estimate for the OU services. You will coordinate with the PM and complete the remaining required customer information before submitting the updated WR to GSA for potential acceptance into an RWA. For information and screenshots on how to enter information in the remaining customer tabs, see pages 15-29 of the “Submitting RWA Work Requests to GSA in eRETA” user guide available at www.gsa.gov/ereta on the “eRETA Training Materials” page.

The screenshot shows the 'Customer Information' form in the eRETA system. Key fields include:

- WR/RWA Number: W1906198
- Status: Pre-planning
- Input Code: A
- Customer Request Date: [Empty]
- Customer Signature: [Empty]
- GSA Region: 07
- Requested By: GSA Data Entry
- Estimate Tracking No.: [Empty]
- Agency Bureau: 01001-Judiciary-Administrative Office Of U.S. Courts
- Primary Building State: Texas
- Building: TX0503HS
- Address: 643 E Cesar E Chavez BLVD
- City: San Antonio
- Building Name: ADRIAN A. SPEARS JUDICIAL TRAI
- Zip Code: 78206
- Overtime Utilities: Yes
- Estimated FY Needed: Current
- Requested Service Period: 10/01/2019 to 09/30/2020
- Agency POC Name: Lisa
- GSA PM/POC Name: Lisa Howland

 The 'Submit Request' button is highlighted with a red box.

NOTE: if the OU services are for a FY other than the current FY and you attempt to enter your Treasury Account Symbol (TAS) information from the Accounting Details tab, eRETA may generate an error because future TAS information is not loaded into eRETA until closer to the start of the next FY. As such you could enter all other WR info prior to 10/01, and on 10/01 you would enter the required TAS info and send to GSA for acceptance into an RWA.

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2) If there is an existing estimate in eRETA for the OU service, create an RWA Work Request (WR) by moving your cursor over the “Data Entry” dropdown and selecting “Create Work Request.” Enter or copy/paste the Estimate Tracking Number (ETN) in the “Estimate Tracking No.” field at the top right of the screen. If you are unable to locate the ETN from a previous GSA email, you can search for it by clicking on the magnifying glass icon. Once the ETN is entered or selected, eRETA will auto-populate the information from the estimate into the WR. Then, enter any remaining required fields and click the “Save” button located at the bottom right corner of the screen to generate a unique tracking number for your request. Lastly, click the “Submit Request” button to route the request to GSA. After hitting “Submit Request”, you will coordinate with the assigned GSA Project Manager and complete the remaining required customer information before submitting the updated WR to GSA for potential acceptance (see the NOTE on the previous page regarding entering TAS information for a future FY). For information and screenshots on how to enter information in the remaining customer tabs, see pages 15-29 of the “Submitting RWA Work Requests to GSA in eRETA” user guide available at www.gsa.gov/ereta on the “eRETA Training Materials” page.

Customer Information

WR/RWA Number: W1907348 Customer Request Date: Requested By: GSA Data Entry: **Estimate Tracking No:** OUTX0100119151037

Status: Pre-planning Customer Signature: GSA Region: 08

Required Fields

* Agency Bureau: 01001-Judiciary-Administrative Office Of U.S. Courts

* Primary Building State: Texas * City: San Antonio

Building: TX0503HS Building Name: ADRIAN A. SPEARS JUDICIAL TRAI

Address: 643 E Cesar E Chavez BLVD Zip Code: 78206 -

Room Number/Specific Location in Facility: Request for multiple buildings (If yes, Address in Desc. of Regts.)

* Overtime Utilities: Yes

* Estimated FY Needed: 2020 Requested Service Period: 10/01/2019 to 09/30/2020

This work is related to other RWA(s) Related RWA Number(s):

* Estimated Amount: \$2,500-\$150,000 Agency RWA Mailbox: Add new...

* Agency_POC: patricia_delgado@aotx.uscourts.gov GSA PM/POC: (if known) lisa.howland@gsa.gov

Name: Delgado, Patricia Name: Howland, Lisa

Phone: (210) 301-6305 Phone: (210) 306-2939

* Description of Requirements: Overtime Utilities for Cesar Chavez BLVD FY20.

(Limited to 500 Characters) Changes made above will simultaneously be made to the linked Estimate

Enter comments to provide additional information to GSA:

Buttons: Delete Save **Submit Request** Reset Form

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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 pbsnationalhelpdesk@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)