RETA/eRETA Digital Signature Enhancements

In this Quick Reference Guide, we will preview how GSA customer agencies can utilize the RWA Digital Signature Solution integrated with RETA/eRETA. This is the required signature method for all federal customers.
Last revision: 12/20/2019

Summary of RETA/eRETA Digital Signature Solution

This User Guide introduces external customer agency users to the RWA Digital Signature Solution that allow for customer agencies to digitally sign RWAs. This user guide will provide instructions and screenshots on *how* to apply a digital signature to any new or amended RWA. Definitions for numerous fields are available in eRETA by clicking on the linked field title to launch the eRETA Glossary.

Searchable fields can be drilled down through the magnifying glass symbol 🔍 within eRETA.

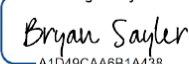## This Quick Reference Guide (QRG) contains the following topics:

RETA/eRETA Digital Signature Enhancements

1) Integrated Digital Signature Solution

RETA/eRETA has teamed up with the Digital Signature Solution (DSS) team who was tasked with developing an enterprise-wide digital signature solution for multiple GSA applications. RETA/eRETA was the first GSA-PBS application to pilot the new functionality and is now the first to go-live with this integrated solution. The DSS team uses DocuSign software as the delivery agent for the RWA Program's digital signature solution (eSignLive was used until 12/19/2019 when GSA transitioned to DocuSign).

A high level overview of the digital signature workflow is outlined in the following bullets:

- After the customer clicks the "Send to GSA" button on the Customer Approval tab, the GSA Data Entry User must enter and validate information in RETA before routing for signatures. Once they click "Request Signatures", the RWA goes into "Signature-Requested" status.
- The Customer Agency Fund Certifying Official (FCO) will digitally sign the RWA via an email from DocuSign.
- After the Customer FCO digitally signs the RWA, the GSA-PBS Approving Official will also digitally sign the RWA via an email from DocuSign.
- Signers do NOT need RETA/eRETA access to apply a digital signature
- Once all signatures are applied, DocuSign sends the completed 2957 Form back to RETA/eRETA. RETA submits the RWA to GSA's financial management system (Pegasys) and uploads a copy of the signed 2957 Form to the RETA Documentation Tool. Lastly, RETA sends an email to the GSA Data Entry user who initiated the request for signatures to inform them they can now send the RWA Acceptance Letter.

28A. GSA Approving Official's Signature	DocuSigned by: *Bryan Sayler* A1D49CAA6B1A438...		28B. Date
		12/19/2019	
28C. GSA Approving Official's Phone Number		28D. GSA Approving Official's Name	
(701) 556-6123 Ext -7		Bryan Sayler	

Digital Signature name and date-stamp on the RWA 2957 Form.

RETA/eRETA Digital Signature Enhancements

1a) Customer Agency Digital Signature

The Electronic Signature Request Option is the only signature option for federal customers so it is the default option when a customer navigates to the Customer Approval tab. RETA/eRETA will only require the email address of the Fund Certifying Official. This individual will receive an email to apply his/her signature once the RWA is routed for signatures by GSA. The signature status will display as "Not Yet Signed" and the signature date will remain blank until the digital signature is applied.

Customer Approval Tab with email of Customer Fund Certifying Official.

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1b) GSA Digital Signature

The GSA-PBS Approving Official is also required to use the digital signature functionality to sign the RWA. On the "PBS Approval" tab, RETA will only require the email address of the GSA-PBS Approving Official. This individual will receive an email to apply his/her signature once the RWA is routed for signatures. The signature status will display as "Not Yet Signed" and the signature date will remain blank until the digital signature is applied.

NOTE: The RWA Acceptance/Start Date and Actual Substantial Completion Date (if a severable service = Yes) will continue to be required fields on the "PBS Approval" tab.

PBS Approving Official signature blocks on the PBS Approval tab.

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1c) Digital Signature Routing (GSA Action Only)

After the customer clicks the "Send to GSA" button on the Customer Approval tab, the GSA Data Entry User must enter and validate information in RETA before routing for signatures. Once they click "Request Signatures" on the PBS Approval tab, the RWA goes into "Signature-Requested" status.

NOTE: the "Submit to Pegasys" button will be disabled until signatures are applied.

Request Signatures button will route the RWA for signatures, and the Submit to Pegasys button is disabled.

A confirmation message will be presented to the GSA Data Entry user to confirm who will receive an email to apply their digital signature to the RWA. Clicking "Confirm" will begin the signature routing process.

Confirmation message of who will receive notification to apply their digital signature to the RWA.

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## 1d) DocuSign Automated Emails

Once the GSA RETA Data Entry user routes the RWA for signature, the customer agency Fund Certifying Official, and afterwards, the GSA-PBS Approving Official, will receive an email from DocuSign to apply their digital signature to the RWA. The email will include a simple summary of the RWA they are being requested to sign, along with a button to review the document and apply digital signature.

The customer agency Fund Certifying Official will receive the automatic email from DocuSign first. Once their signature is applied, the GSA-PBS Approving Official will then be sent the DocuSign email second.

Suganthi Balachandiran via DocuSign <dse_demo@docusign.net>   10:52 AM
to me

GSA®

Suganthi Balachandiran sent you a document to review and sign.

REVIEW DOCUMENT
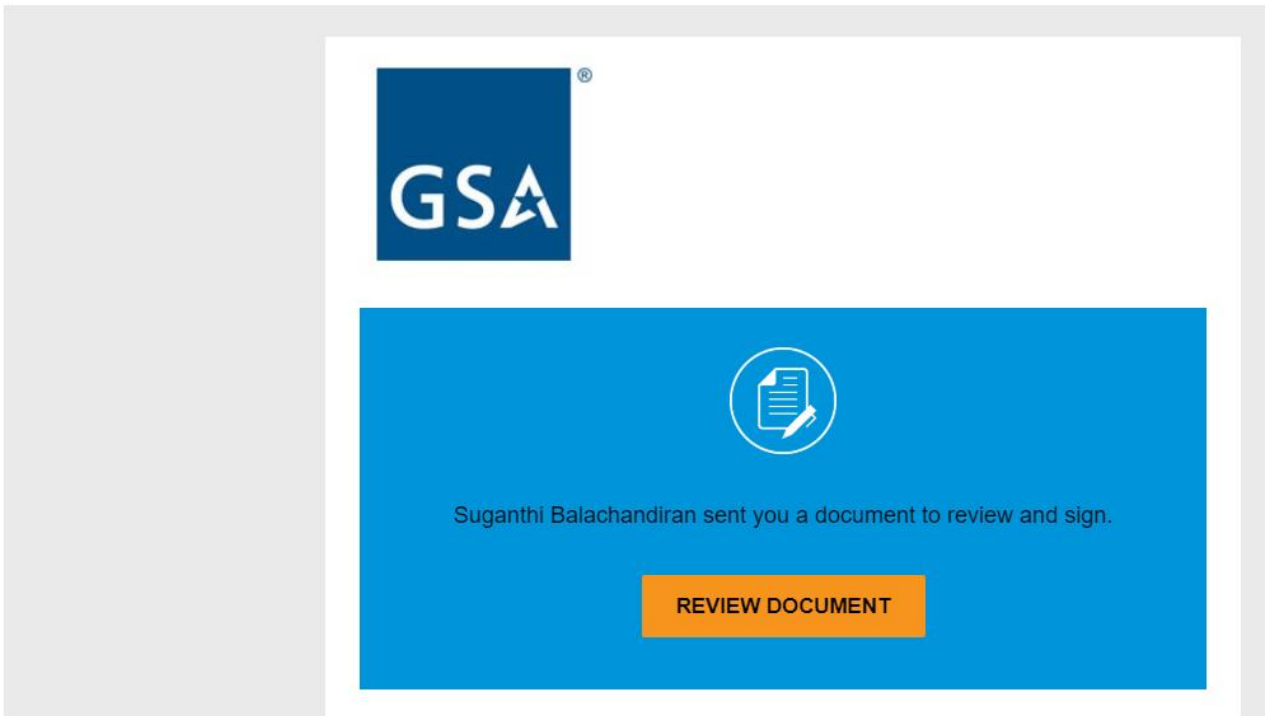
Sample email from DocuSign to RWA Signatory Authorities requesting them to digitally sign the RWA

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1e) Applying Digital Signatures to the RWA in DocuSign

NOTE: RETA/eRETA access is NOT required to apply a digital signature. Signatures will be applied directly in DocuSign which does not require a unique user ID or password.

The process of applying a digital signature to an RWA is identical for both the customer agency Fund Certifying Official and the GSA-PBS Approving Official. The steps are as follows:

1) Click the "Review Document" button from the automated DocuSign email.
2) A new DocuSign tab or window will open taking the signer to a page prompting them to review and act on the documents. Click the "Continue" button.
3) After reviewing the document, click the "Sign" button in Block 18A. Doing so will apply the digital signature and capture the date of the signature.*
4) Click the "Finish" button.

*If the signer has not previously used DocuSign, a new tab or window will open taking the signer to a page prompting them to adopt their signature. After doing so, click "Adopt and Sign".

Once the GSA-PBS Approving Official applies his/her signature, DocuSign will generate an email containing a link to download the final RWA 2957 Form with all signatures applied. The email will be automatically sent to all digital signers and the GSA Data Entry User who first routed the RWA for signature.

RWA 2957 Form awaiting the GSA Approving Official to apply his/her signature in DocuSign.

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1f) Automatic Submission of RWAs to Pegasys and Automatic Uploading of Signed RWA to RETA/eRETA Documentation Tool

Once all signatures are applied, DocuSign sends the completed 2957 Form back to RETA/eRETA. RETA/eRETA updates the signature dates in the appropriate fields of the RWA and then submits the RWA to Pegasys (or submits the RWA to an "In Queue" status if the Pegasys-RETA Interface is offline). Furthermore, RETA/eRETA will automatically upload a copy the digitally signed 2957 Form to the Documentation Tool.

Copy of the Digitally Signed RWA 2957 Form automatically uploaded to the RETA/eRETA Documentation Tool.

1g) Automatic RETA email to GSA Data Entry User to Issue Acceptance Letter

Once RETA uploads a copy of the digitally signed RWA 2957 Form to the Documentation Tool, RETA will then send an automatic email to the GSA Data Entry user who initiated the request for signatures. This email will instruct the GSA Data Entry user to log into RETA, pull up the RWA that was just signed, and generate the RWA Acceptance Letter to be sent to the appropriate contacts.

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1h) When New Signatures are Required vs Optional on RWA Amendments

RETA will require signatures for all new RWAs (A-input code) and for any RWA amendment (H- or X-input code) where one of the following fields <u>changes</u> from the previous RWA submission:

- authorized amount increase/decrease,
- customer fund year,
- customer fund type,
- customer fund expiration,
- customer Fund Certifying Official email address selected, or
- GSA-PBS Approving Official email address selected

When one of these fields is changed on an amendment, the "Submit to Pegasys" button on the "PBS Approval" tab will be disabled and the "Request Signature" button will be enabled, requiring the RWA to be routed for digital signatures again.

NOTE #1: The GSA Data Entry user can optionally choose to route any other RWA amendment for new signatures – even when one of the key fields above is not changed.

NOTE #2: If a customer agency eRETA user or GSA RETA user accidentally changes one of the above fields that will require new signatures, the amendment will have to be deleted and re-started in order to properly process an administrative amendment that does not require new signatures.

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2) Signature History Tab

A "Signature History" tab is available on the "RWA History" screen for all RWAs. This tab captures the signature history of all RWA transactions that require a signature. The tab identifies what GSA Data Entry User initiated the signature request and when, the date and timestamp of the customer agency signer, as well as the date and timestamp of the GSA signer. Also available is the "Evidence Summary" which is recorded by DocuSign and uploaded into RETA after the signature routing process completes. The Evidence Summary captures information about each signer including the IP Address of the computer from which they applied their signature along with the date their signature was applied.

Signature History tab displaying the history of digital signatures applied to the RWA.

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3) RWAs Locked When Awaiting Signatures; Abandoning a Digital Signature Request (GSA Action Only)

When an RWA is routed for signature, the RWA is locked and no additional edits can be made to the RWA until the signature routing process is complete (after all digital signatures are applied). RETA will display a status of "Signature-Requested" to indicate that the RWA is locked and currently waiting for all digital signatures to be applied.

However, there may be an instance where an RWA is routed for digital signatures by the GSA Data Entry user and shortly after that a mistake was noted or a missing piece of data was identified that was not entered on the RWA currently being routed for signature. Any GSA Data Entry user in the region that 'owns' the RWA can halt the signature request by clicking the "Abandon Signature Request" button on the Customer Information tab (new, A-input code RWAs) or the RWA Summary screen (all amendments). After confirming this is the action desired, RETA will revert the RWA back to Pending-New or Pending-Mod status and allow additional changes to the RWA. The DocuSign email previously sent to the customer and/or GSA signatory authorities will not be retracted, however any signatures they apply to that now abandoned request will not be sent back in to RETA.

Once all additional edits are made, the GSA Data Entry user can then route the RWA for signature again. The RWA signatory authorities will receive a new DocuSign email to apply their digital signature. While the subject line will have a new sequential number in it to differentiate it from the abandoned signature request, it is recommended that the GSA Data Entry user send an email to the signatory authorities as well just to let them know of the situation. Also the most recent signature package (i.e. the package that will be sent back to RETA/eRETA once signatures are applied) will be shown by the package name on the Customer Information tab (for GSA users only). For example if an RWA is routed for signatures and then abandoned and re-routed for signatures, the package name would end in "_002" since it is the second package routed for signatures. Any signatures applied to the first package (the package ending in "_001) will not be sent back to RETA/eRETA.

Current signature package information and Abandon Signature button shown on Customer Information tab (GSA users only).

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4) Signatory Authority "Decline to Sign" a Digital Signature Request

Any signer can choose to "Decline to Sign" a Digital Signature Request. To do so the signer would click the "Decline to Sign" button in DocuSign. This will require the signer to enter a justification as to why they are declining to apply their digital signature. Once the justification is entered, DocuSign will send an email back to the GSA Data Entry user who initiated the signature process informing them of the signer who declined to sign along with the justification they entered.

The RWA at this point will return to its previous status of Pending-New or Pending-Mod and the GSA Data Entry user will then re-route the RWA for digital signatures again – after first resolving any issues that may have caused the signer to decline signing the RWA in the first place.

A signatory authority chooses to 'Decline to Sign" instead of apply signature.

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5) Other Electronic RWA Features Offered by GSA

In addition to digital signatures, eRETA requires federal customer agencies to enter RWA Work Requests and/or all of their RWA information (the equivalent to page 1 of the RWA 2957 Form) directly into eRETA. This new electronic workflow allows customer agencies to enter requests for new projects or services, obtain a unique tracking number, and route it to the appropriate GSA region immediately. GSA will then assign a project manager shortly thereafter to begin developing the project/service needs. Additionally, eRETA allows customer agencies to enter their entire RWA directly into GSA's RWA database, ensuring data is correctly entered and not mistakenly omitted. RETA/eRETA is also the source of many of the data elements printed on RWA billing statements.

For more information on entering Work Request and RWAs directly into GSA's RWA database (RETA/eRETA), please visit www.gsa.gov/ereta. This site has User Guides and Training Videos available for download.

For Additional Questions the following resources are available:

- Navigate to www.gsa.gov/ereta to apply for access and for additional eRETA training resources including user guides, promo guides, 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)