

How to Create and Send FY20 Overtime Utility Requests via eRETA

There are just two months left until eRETA becomes the mandatory method to create and submit Work Requests (WRs) and RWAs to GSA! As such if you have any FY20 overtime utility needs (e.g. heat, water, electricity), those requests must be sent to GSA via eRETA. To make sure you are prepared for the October 1, 2019 (FY20) conversion date, here is another Quick Tip! This Quick Tip 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 “2020” in the “Estimated Fiscal Year (FY) Needed” dropdown.

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.

The screenshot displays the eRETA Customer Information form. The form is titled "Customer Information" and includes a navigation menu on the left with options: CUSTOMER INFORMATION, BILLING INFORMATION, ACCOUNTING DETAILS, CUSTOMER APPROVAL, PBS INFORMATION, AUTHORIZING DETAILS, and PBS APPROVAL. The main form area contains the following fields and values:

- WR/RWA Number: W1908198
- Status: Pre-planning
- Customer Request Date: [Empty]
- Customer Signature: [Empty]
- Requested By: [Empty]
- GSA Data Entry: [Empty]
- Input Code: A
- GSA Region: 07
- 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
- Room Number/Specific Location in Facility: [Empty]
- City: San Antonio
- Building Name: ADRIAN A. SPEARS JUDICIAL TRAI
- Zip Code: 78206
- Overtime Utilities: Yes
- Estimated FY Needed: 2020
- Requested Service Period: 10/01/2019 to 09/30/2020
- Estimated Amount: [Empty]
- Agency POC Name: [Empty]
- GSA PM/POC Name: lisa.howland@gsa.gov
- Description of Requirements: Overtime Utilities for Cesar Chavez BLVD FY20

At the bottom of the form, there are buttons for "Delete", "Save", "Submit Request", and "Reset Form". The "Submit Request" button is highlighted with a red box. A red asterisk indicates required fields.

NOTE: since the OU services are for a future FY, if 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 10/01/19, and on or after 10/01/19 you would enter the required TAS info and send to GSA for acceptance into an RWA.

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).

BONUS KNOWLEDGE: The “Amendment Summary” tab is now accessible at all times to all users (Read Only and Data Entry) for all RWAs that have been amended at least once. For more information and to learn about other recent enhancements, visit www.gsa.gov/ereta and navigate to the “eRETA Training Materials” page where you’ll find a document titled “eRETA 8.7 Enhancements”.

DOUBLE BONUS KNOWLEDGE: Training, training and more training!

We continue to offer two eRETA training sessions per month: one overview session and one advanced session. Register by visiting www.gsa.gov/ces or by clicking the links below!

- **eRETA Basics - Overview Sessions**
 - [August 6: 1-3pm \(eastern\)](#)
 - [September 10: 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)*
 - [August 15: 1-2:30pm \(eastern\)](#)

Still thirsty for more information and training on eRETA? Visit www.gsa.gov/ereta and/or email eRETA@gsa.gov to let us know how we can better meet your needs to ensure a seamless conversion to going fully electronic with eRETA!