Full Transfer Training Guide
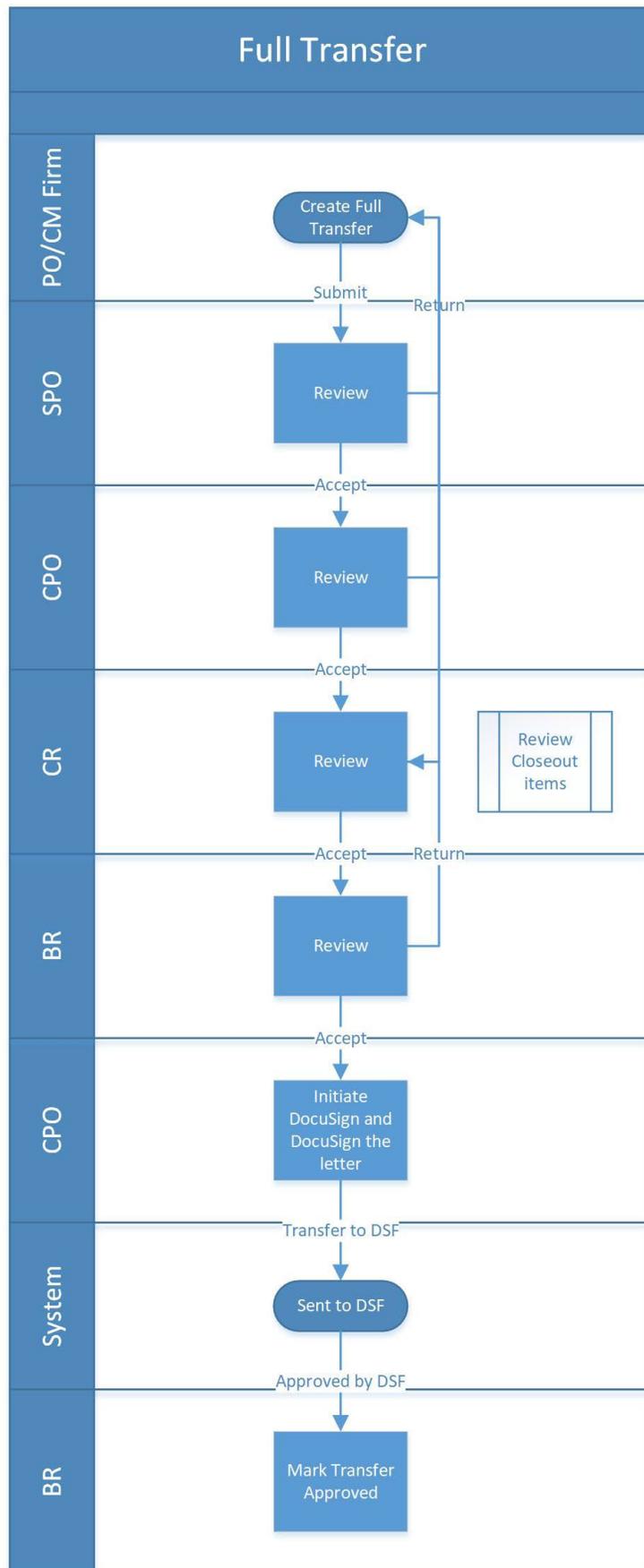
Date Created: 3/21/2023
Date Updated: 7/31/2023

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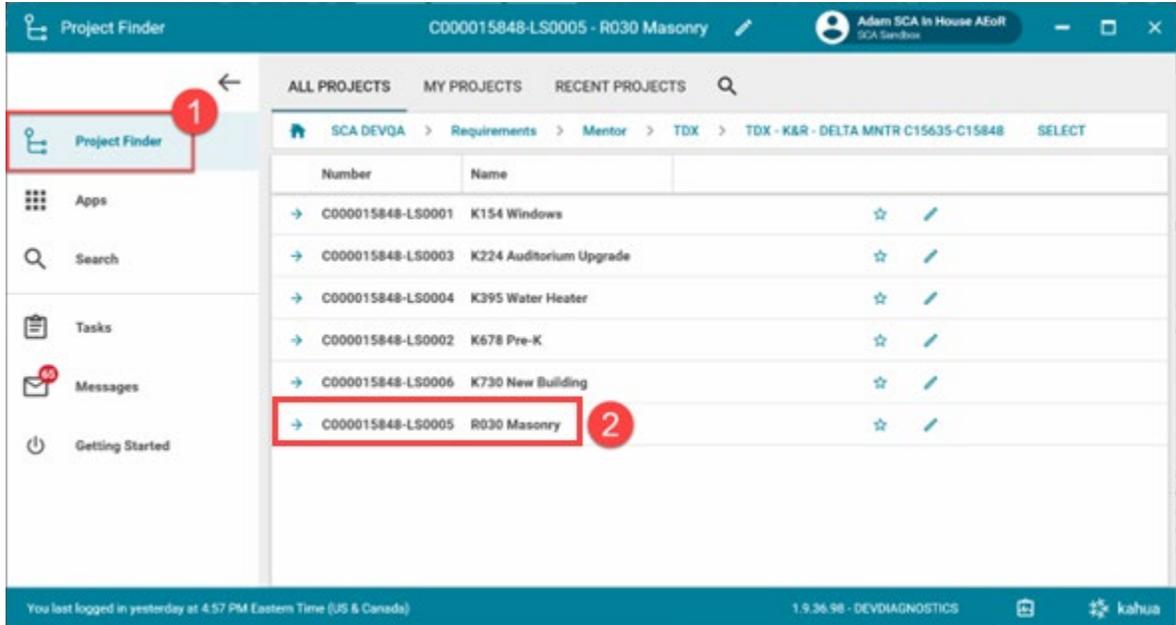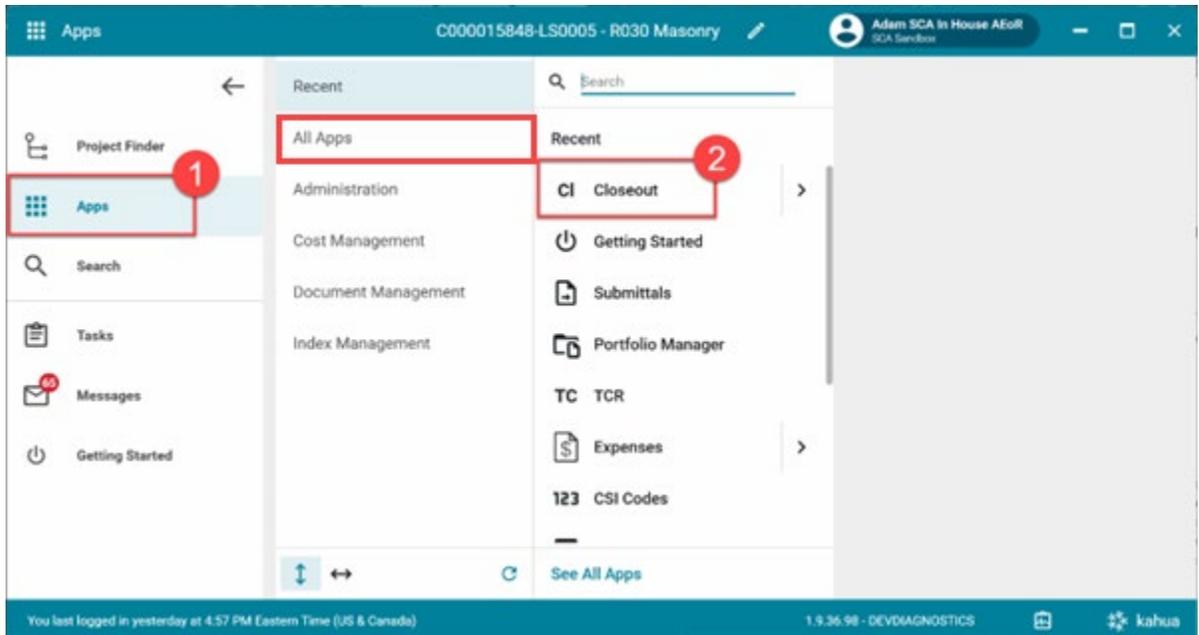
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Mark Transfer Approved

Step-by-Step Instructions
PO/CM Firm Creates Full Transfer

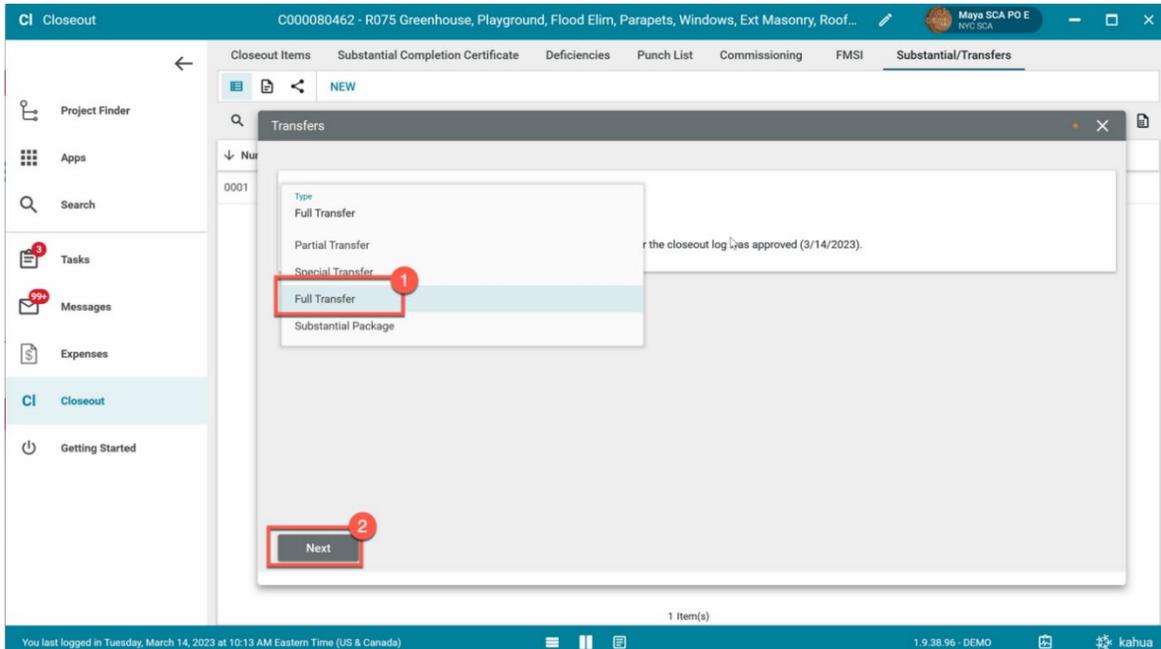1. Go to Project Finder > Select the desired project

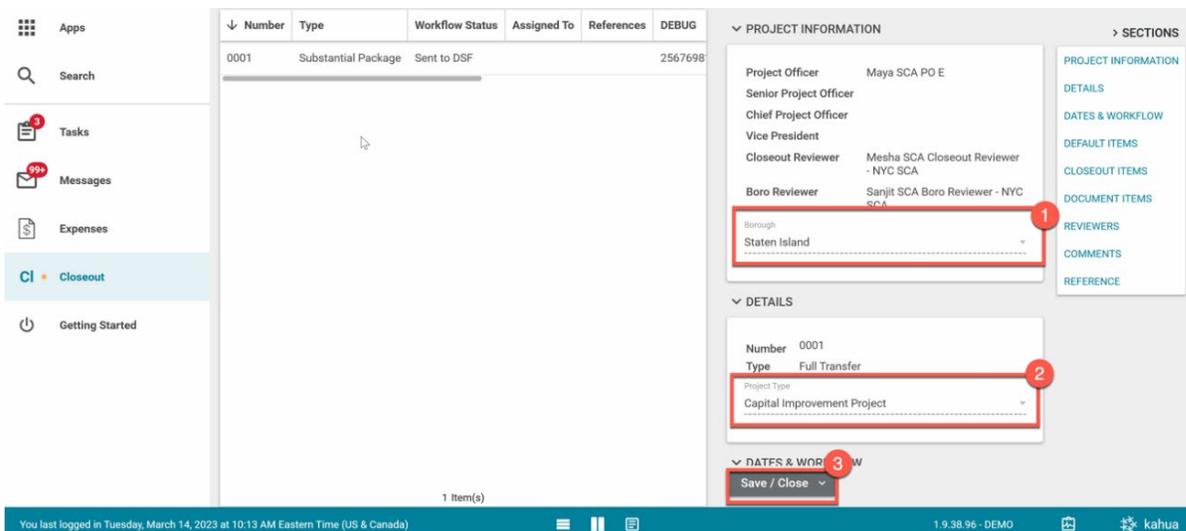2. Go to **Apps** > **All Apps**> Select the **Closeout** App

3. Click the **Substantial/Transfers** tab> Click **New**

4. Select **Full Transfer** and click **Next** at the bottom of the window.

5. **Project Information** section: If this is a Mentor project, select the correct **Borough**
6. **Details** section: Enter **Transfer Description** (Required)

7. Click **Save/Close** to save a **Draft**. _You have not submitted the transfer at this point._

Edit Full Transfer

You can make changes to the Full Transfer draft before submitting.

a) Click **Edit** at the top
b) Make your changes and click **Save/Close**

8. Click **Submit**

SPO Reviews Full Transfer

1. Go to **Tasks** and select the **Pending SPO Review Full Transfer** task
2. Click **Accept** to confirm the partial transfer**.** Or click **Return** (you will need to provide a reason)
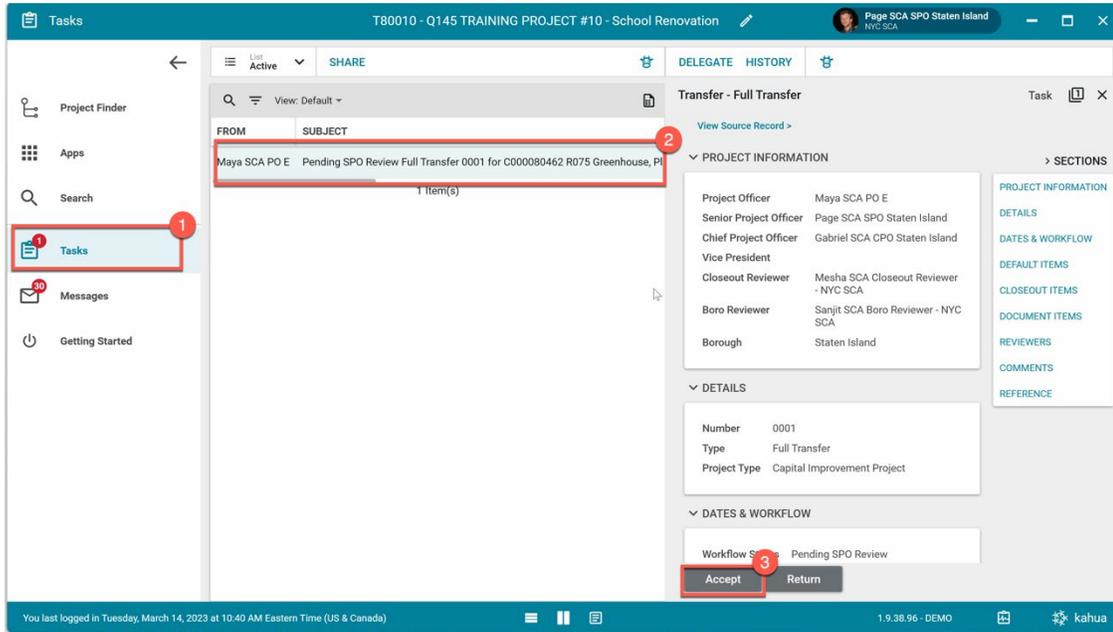
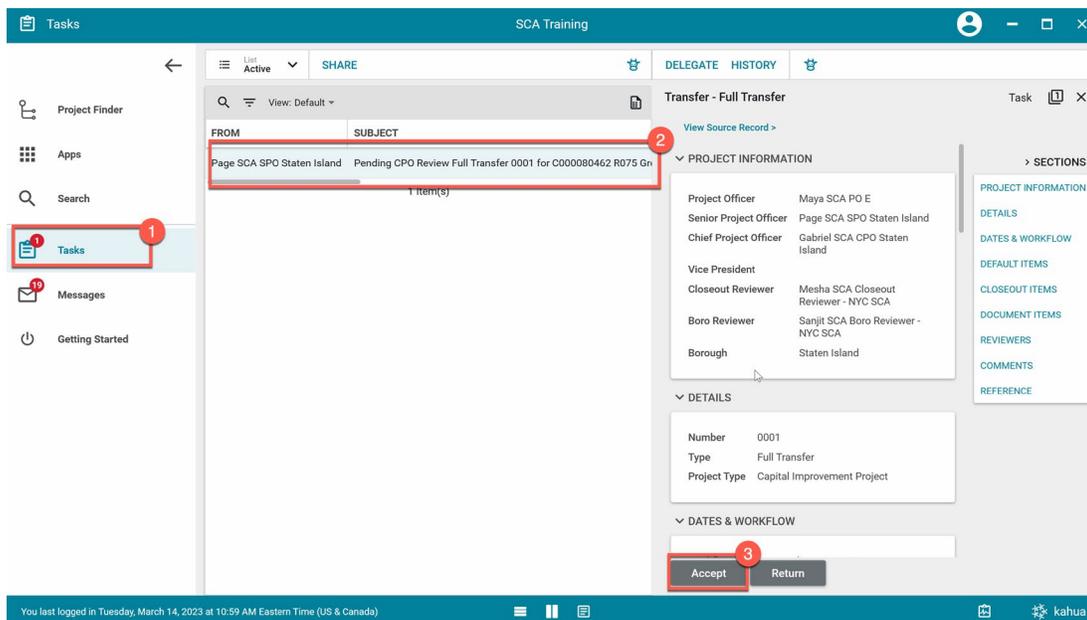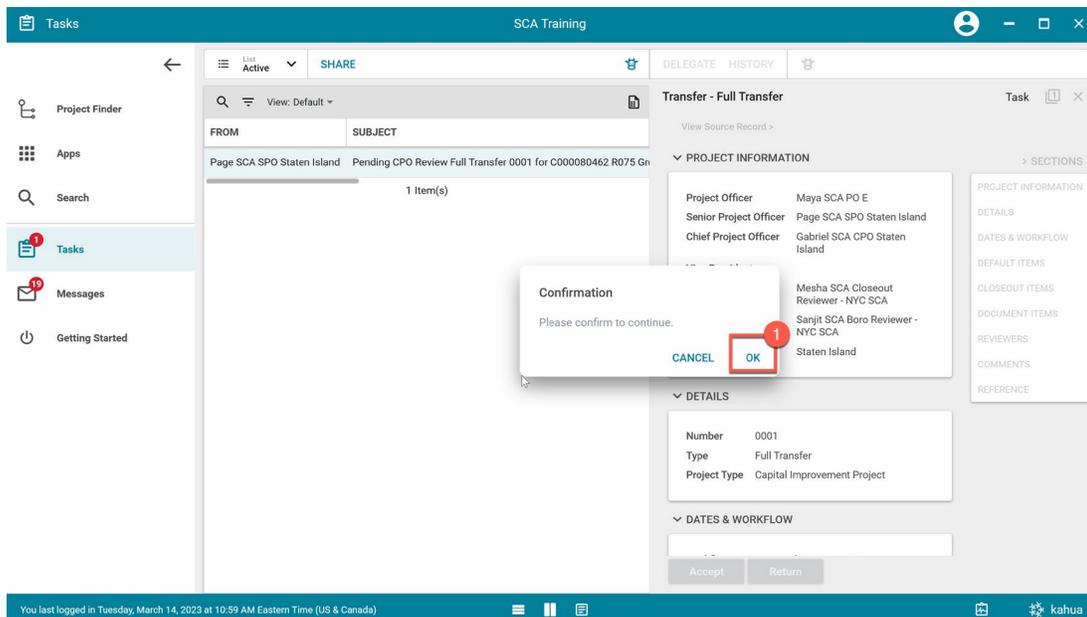3. Click **OK** to confirm the transfer
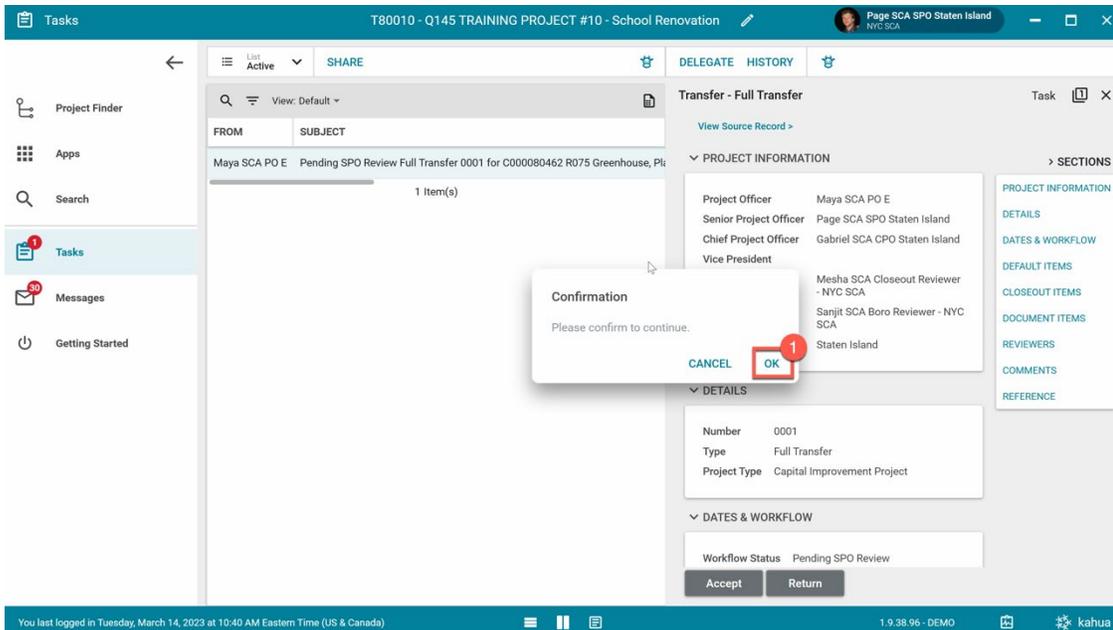
CPO Reviews Full Transfer

1. Go to **Tasks** and select the **Pending CPO Review Full Transfer** task
2. Click **Accept** to confirm the partial transfer**.** Or click **Return** (you will need to provide a reason)
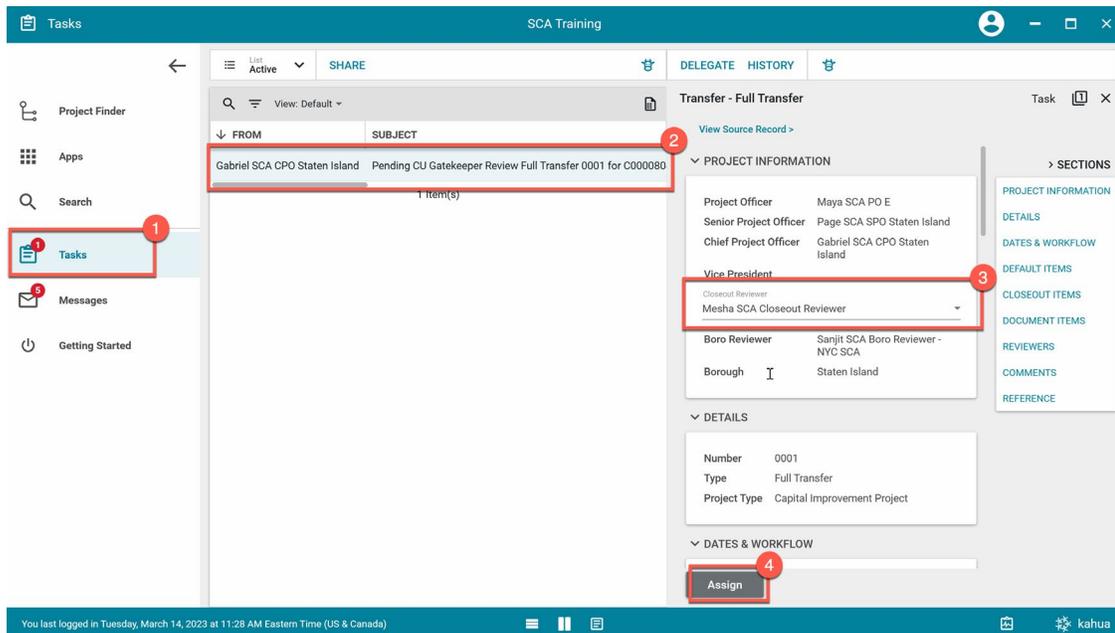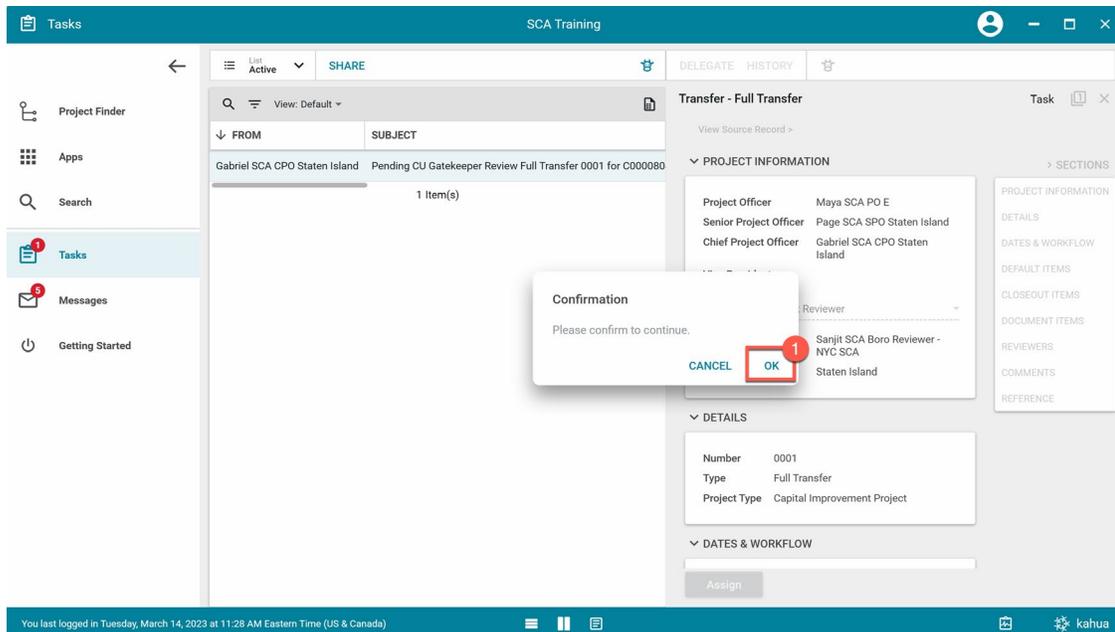

3. Click **OK** to confirm the transfer

CU Gatekeeper Assigns Closeout Reviewer (CR)

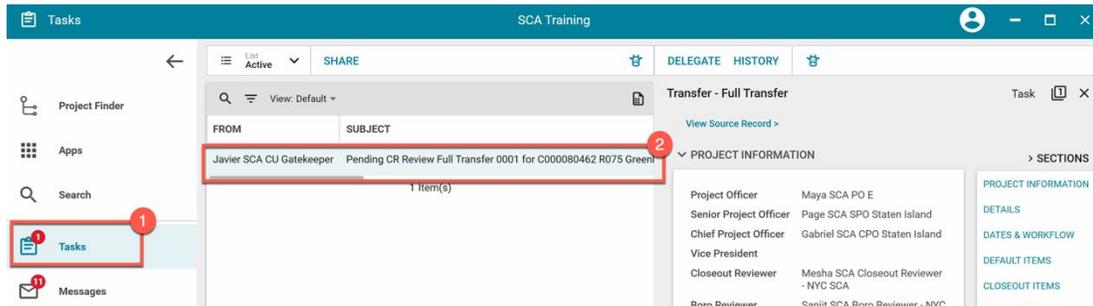1. Go to **Tasks** and select the **Pending CU Gatekeeper Review Full Transfer** task
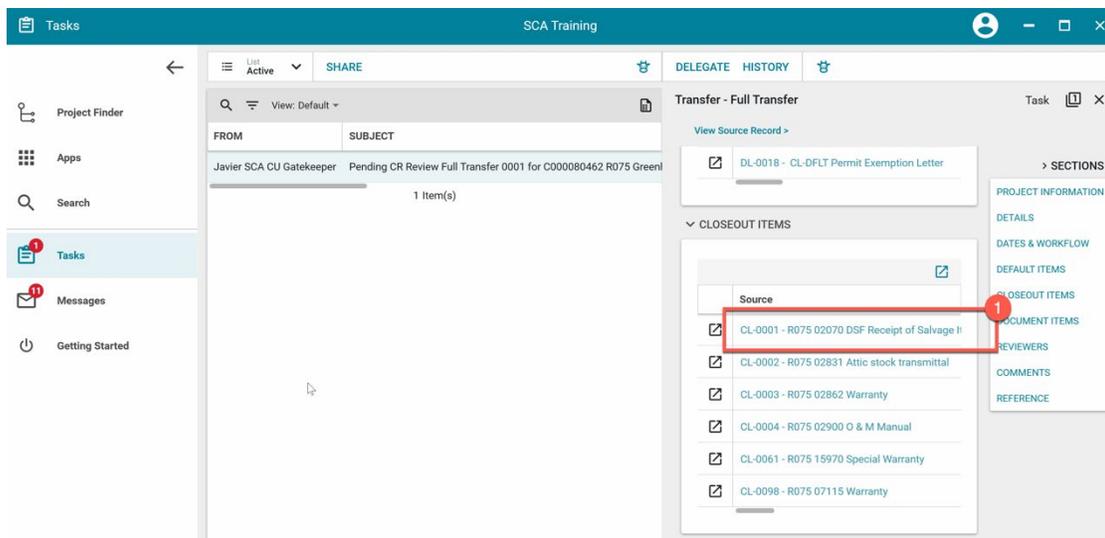2. Click Assign
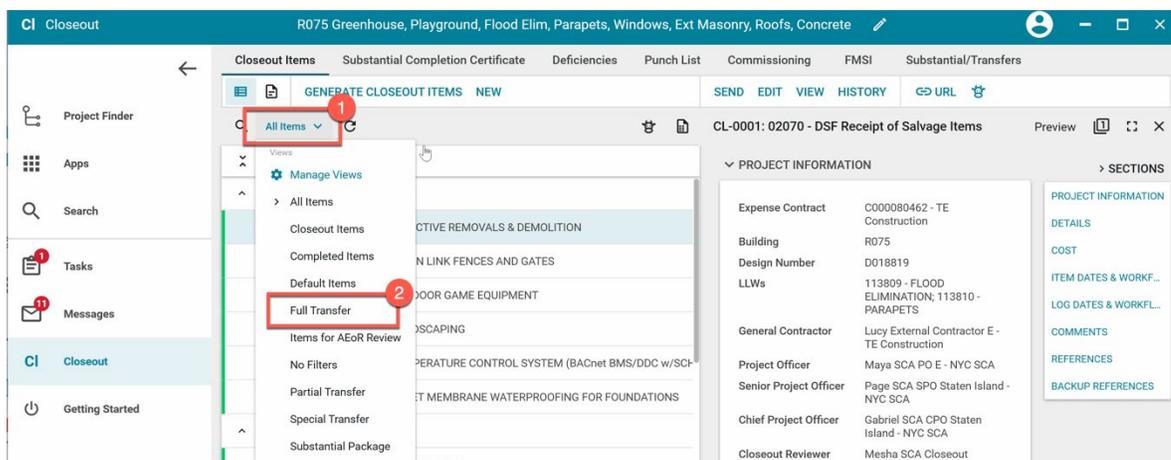

3. Click **OK** to confirm

CR Reviews Full Transfer

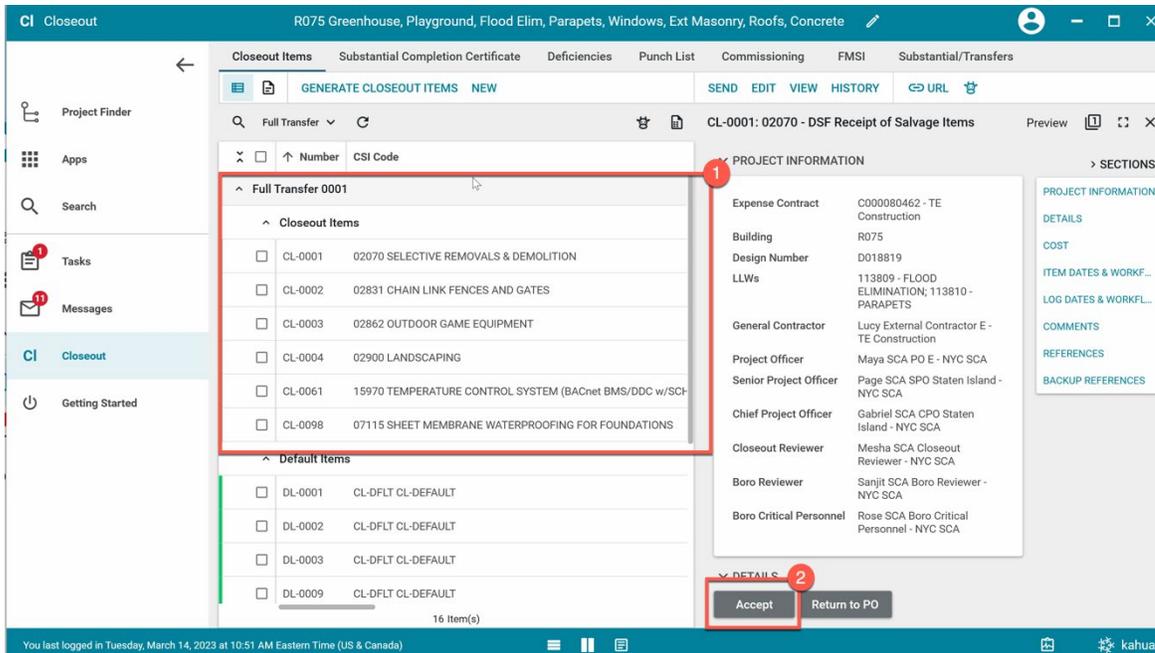1. Go to **Tasks** and select the **Pending CR Review Full Transfer** task

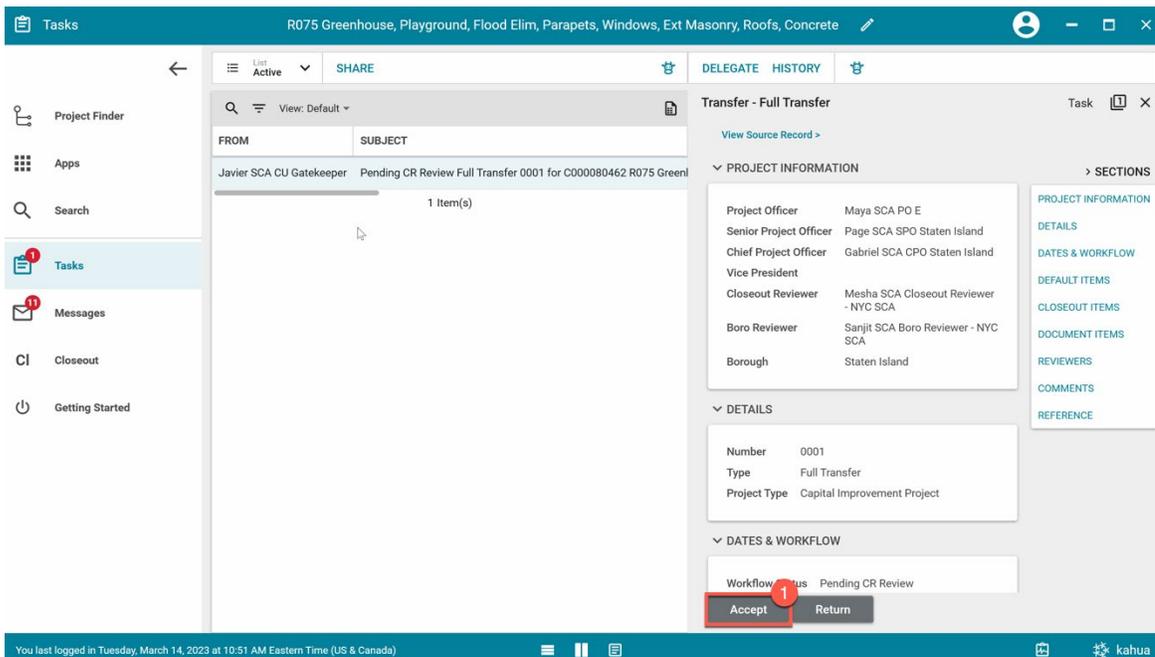2. **Closeout Items** section: Click any of the **links** to redirect you to the Closeout Items app

3. Click the **All Items** menu> Select **Full Transfer** to view partial transfer closeout items only
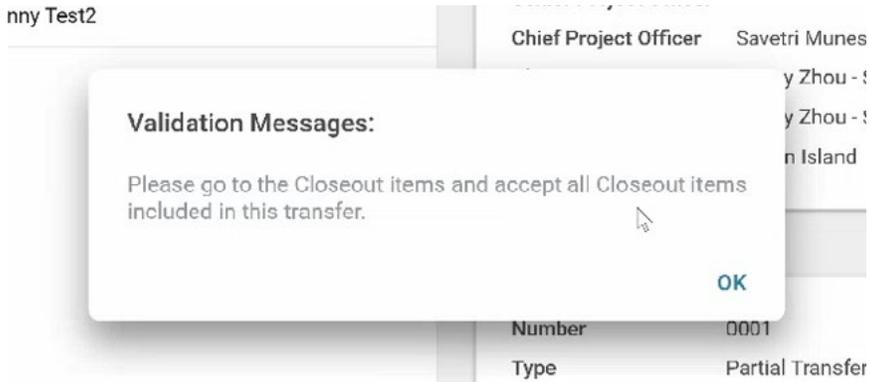
4. Click **Accept** or **Return to PO** for **each** of the Closeout Items starting with CL-XXXX
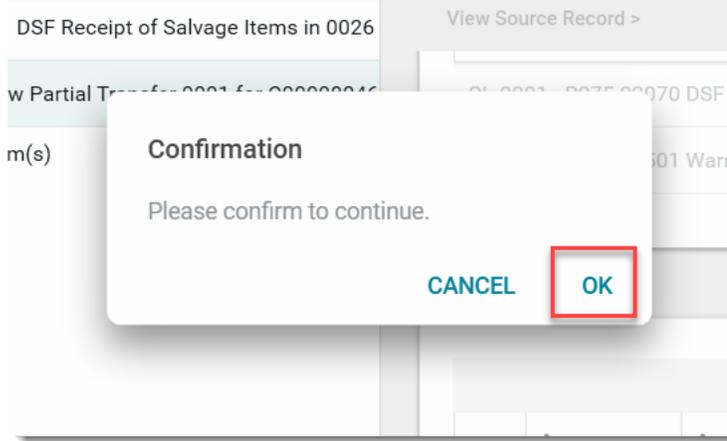

5. Once every closeout item has been accepted by BR, go back to the task and click **Accept**

* If one of the closeout items included in the package is not accepted by CR, and CR tries to click accept button, a warning message will pop up.
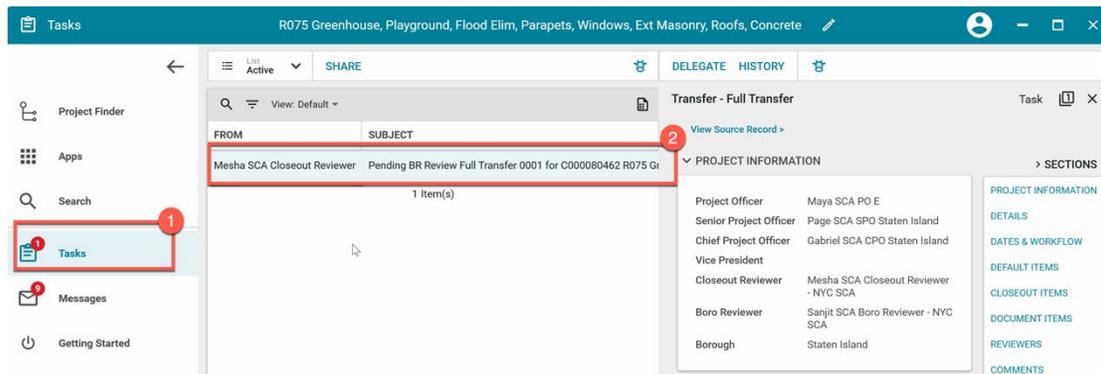
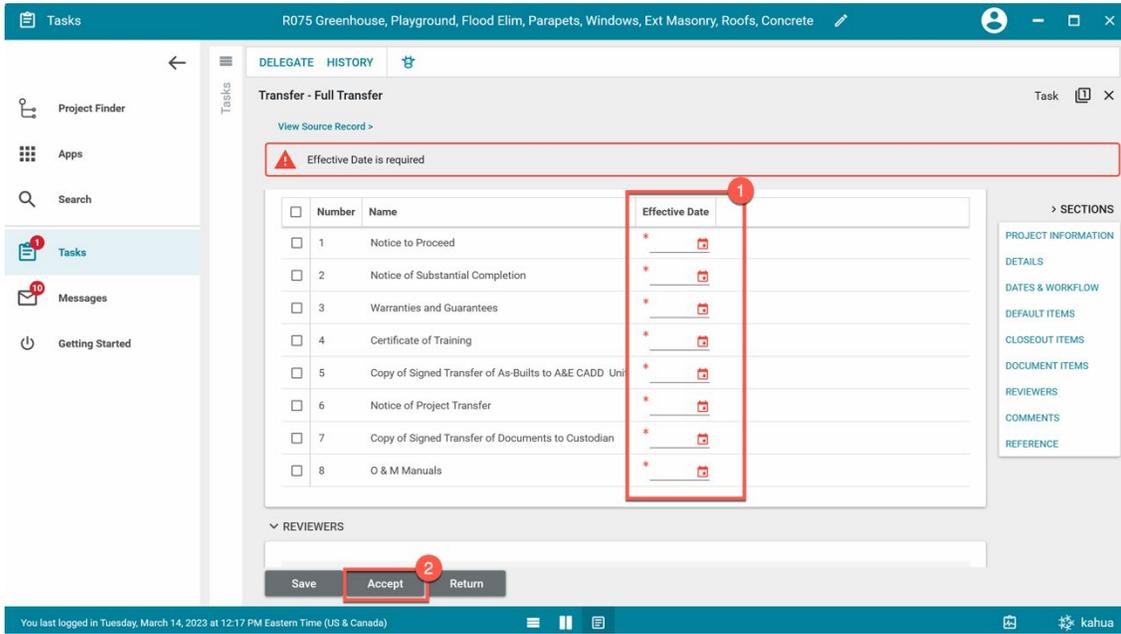6. Click OK for confirmation to accept the transfer.

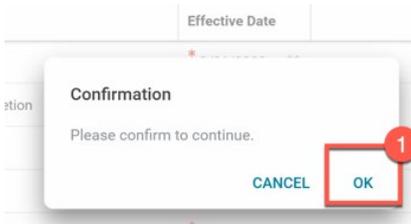## Borough Reviewer (BR) Accepts or Returns Full Transfer

1. Go to Tasks and select the Pending BR Review Full Transfer task

2. Scroll down to **Effective Date** section and fill out dates for each item
3. Option 1: Click **Accept** to confirm the special transfer**.**
   Option 2: Click **Return** (you will need to provide a reason).
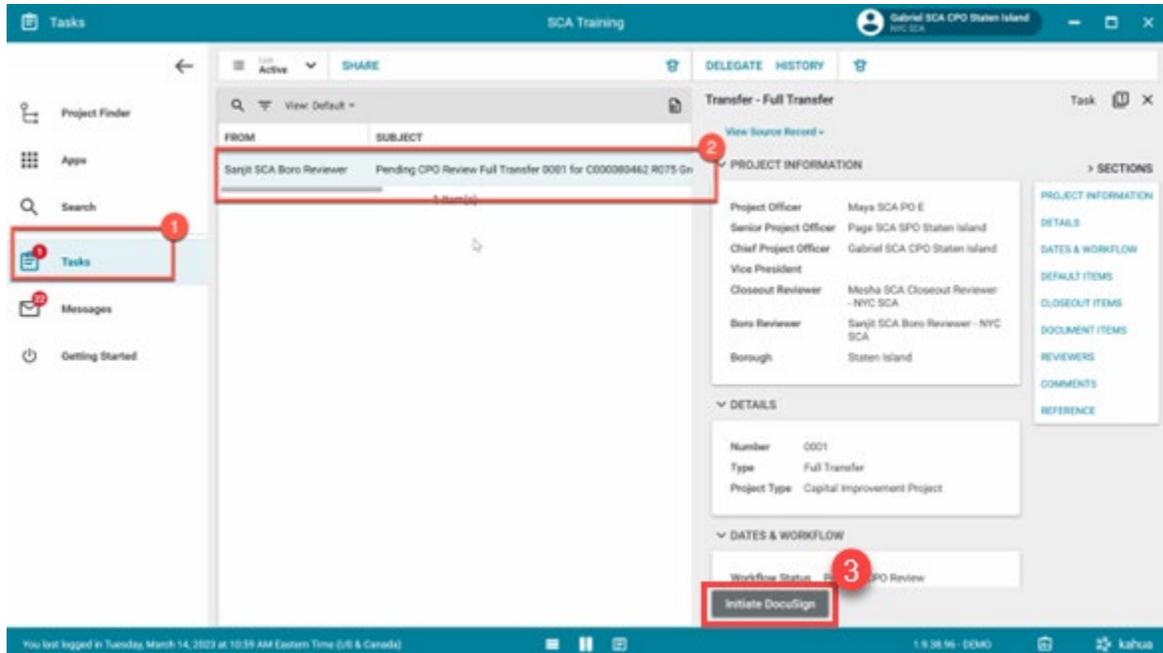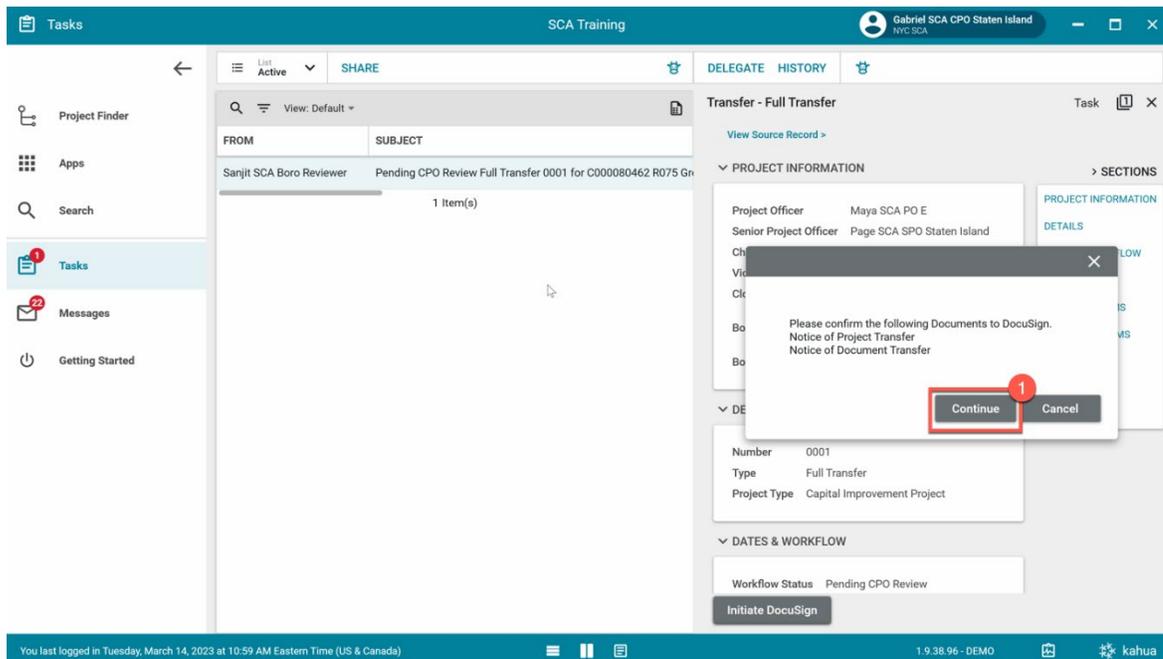
4. Click OK to confirm the transfer

CPO Initiates DocuSign

The Special Transfer has been accepted by the BR and The Notice letters are sent to CPO for DocuSign.

1. Go to **Tasks** and select the **Full Transfer** task
2. Click Initiate DocuSign to start the eSignature process
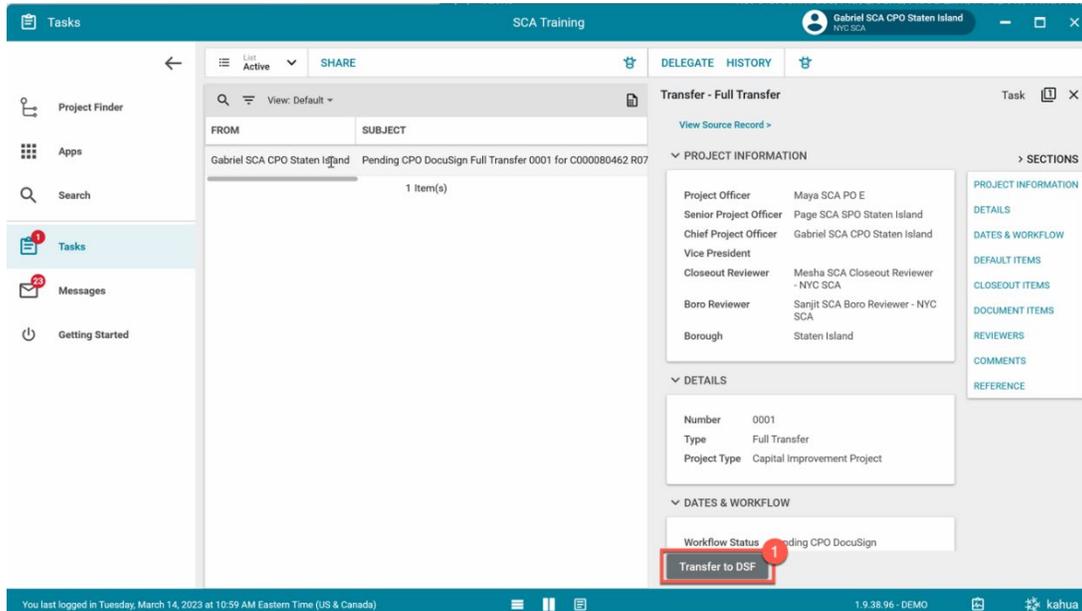

3. Click **Continue** to confirm

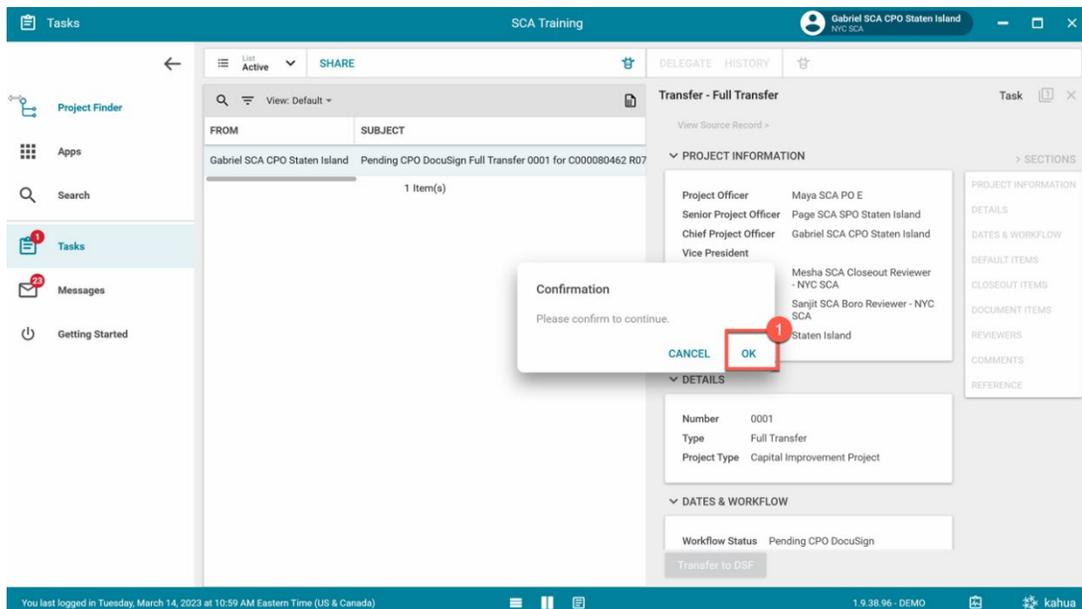## CPO DocuSigns Notice Letters and Transfers to DSF

1. Go to email account (external) > Select email titled **Partial Transfer**
2. Click Review Document in email
3. You are redirected to DocuSign. Click here to learn more about DocuSign.

Wait 2-3 min for Kahua to receive the signed DocuSign.

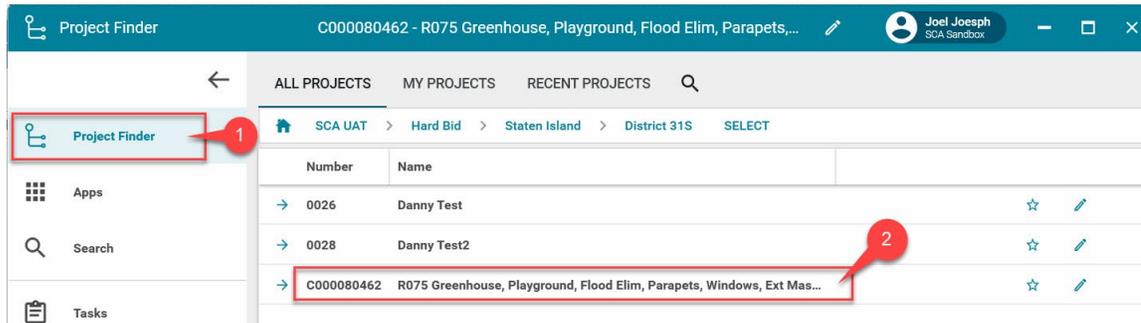4. Go back to your **Task** in Kahua and click **Transfer to DSF**
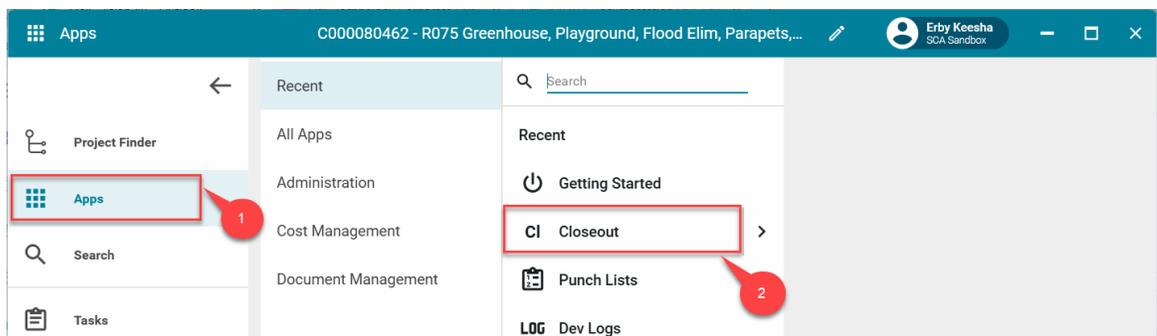

5. Click **Ok** to confirm
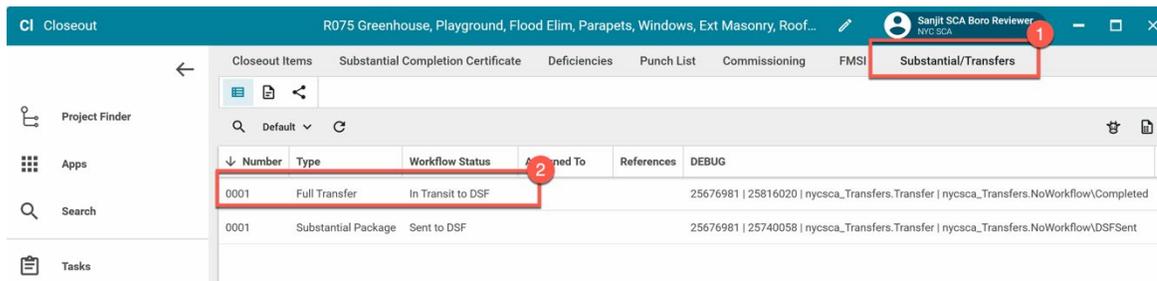
BR Marks Special Transfer approved by DSF

1. Go to Project Finder > Navigate to the desired project

2. Go to Apps> All Apps> **Closeout**

3. Select the **Substantial/Transfer** tab > Select the **Full Transfers package**

4. Click **DSF Approved**