

Full Transfer Training Guide

Date Created: 3/21/2023 Date Updated: 7/31/2023

Table of Contents

Workflow	
Step-by-Step Instructions	4
PO/CM Firm Creates Full Transfer Edit Full Transfer	4 6
SPO Reviews Full Transfer	7
CPO Reviews Full Transfer	8
CU Gatekeeper Assigns Closeout Reviewer (CR)	9
CR Reviews Full Transfer	10
Borough Reviewer (BR) Accepts or Returns Full Transfer	12
CPO Initiates DocuSign	14
CPO DocuSigns Notice Letters and Transfers to DSF	15
BR Marks Special Transfer approved by DSF	16

Workflow



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

1. Go to Project Finder > Select the desired project

۴.	Project Finder	- 12 - 2000 (mmmm) -	C000015848-LS0005 - R030 Mas	ionry 🥒	Adam SCA In House AEoR) - 0	×
	¢	ALL PROJECTS	MY PROJECTS RECENT PROJECT	rs Q			
£:	Project Finder	SCA DEVQA	> Requirements > Mentor >	тох > тох-ки	R - DELTA MNTR C15635-C15848	SELECT	
		Number	Name				
	Apps	→ C000015848-0	LS0001 K154 Windows		* /		
Q	Search	→ C000015848-0	LS0003 K224 Auditorium Upgrade		* /		
-		→ C000015848-0	LS0004 K395 Water Heater		* /		
Ē	Tasks	→ C000015848-0	LS0002 K678 Pre-K		* /		
e	Messages	→ C000015848-0	LS0006 K730 New Building		* /		
da	Gettion Started	→ C000015848-0	LS0005 R030 Masonry		* /		
0	uning status						
You las	st logged in yesterday at 4.57 PM Ea	etern Time (US & Canada)			19.36.98 - DEVDIAGNOSTICS	⊕ \$	kahua

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

	Apps	C00001584	18-LS0005 - R030 Masonry 🧪	Adam SCA in House AEG SCA Sandour	9 -		×
	←	Recent	Q Bearch	_			
÷	Project Finder	All Apps	Recent				
	Apps	Administration	CI Closeout	>			
٩	Search	Cost Management Document Management	Getting Started Submittals				
Ê	Tasks	Index Management	Portfolio Manager				
P	Messages		TC TCR				
ወ	Getting Started		S Expenses	>			
		\$ ↔ 0	See All Apps				
You la	st logged in yesterday at 4.57 PM I	Eastern Time (US & Canada)		1.9.36.98 - DEVDIAGNOSTICS	æ	🎄 ka	hua

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

CI Closeout		C0000	80462 - R075 Greenhouse, Playgrou	nd, Flood Elim, Parapets	Windows, Ext Masonry,	Roof	Maya SCA PO) -	×
	←	Closeout Items	Substantial Completion Certificate	Deficiencies Punch	ist Commissioning	FMSI	Substantial/Transfers		
		■ 🛛 <	NEW		8				

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

CI 0	loseout			C0000	80462 - R075 Gr	eenhouse, Playgro	ound, Flood Elim	Parapets, Win	dows, Ext Masonry	y, Roof 🧷	Maya SCA PO E			
		←	Close	eout Items	Substantial Co	mpletion Certificate	Deficiencies	Punch List	Commissioning	FMSI	Substantial/Transfers	-		
0				₽ <	NEW									
E	Project Finder		٩	Transfer	s							٠	×	
	Apps		↓ Nur											
Q	Search		0001	Type Full 1	Transfer									
1	Tasks			Parti	al Transfer			r the closeou	it log 🖓 as approved (3,	/14/2023).				
	Messages			Full Subs	Transfer	0								
\$	Expenses													
CI	Closeout													
ባ	Getting Started													
				N	ext 2									
				_								_	_	
		_	_					1 Item(s	5)			- PAL		_
You la	st logged in Tuesday, Marc	sh 14, 2023	3 at 10:13	AM Eastern T	ime (US & Canada)		= 11	3			1.9.38.96 - DEMO	<u>ل</u>	換 ki	ahua

- 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**

CI CI	loseout	C00008	30462 - R075 Greei	nhouse, Playground	l, Flood Elin	n, Parapets, 🧪	Joel Joe SCA Sand	esph box	- 🗆 ×
	\leftarrow	Closeout Items	Substantial Con	npletion Certificate	Deficienci	es Punch List Com	nmissioning	FMSI	Substantial/T
0		■ 🗈 <	NEW			SEND EDIT DELETE	HISTORY	GÐ URL	
Ŀ	Project Finder	Q Default 🗸	G		ē	Transfer - Partial 1	fer	Preview	
	Apps	↓ Number	Туре	Workflow Status	Assigned 1	✓ PROJECT INFORMAT	TION		> SECTIONS
Q	Search	0001	Partial Transfer Substantial Package	Active Pending CPO Review	Joel Joesp Savetri Mu	Project Officer Senior Project Officer	Joel Joesph Humberto C	PROJEC	CT INFORMATION
Ê	Tasks					Chief Project Officer Closeout Reviewer	Savetri Mun Danny Zhou	DATES	& WORKFLOW T ITEMS
P	Messages					Borough	Staten Islan	CLOSE	DUT ITEMS IERS
CI	Closeout					✓ DETAILS		сомм	INTS
ባ	Getting Started					Number Type	0001 Partial Transf	REFERE	NCE
			2 Item(s)		Submit			
You las	st logged in yesterday at 4:42 PM	Eastern Time (US & Cana	ida)	= 🛯 🗉		1.9.38.	85 - DEVSCA	æ	to kahua

8. Click Submit

CI Closeout		C000080462 - R075	Greenhouse, Pla	ayground, Flood Elim, Pa	rapets, Wi	ndows, Ext Masonry, Roof 🖋 👹 Maya SCA PO E	- 🗆 ×
	\leftarrow	Closeout Items Substantia	l Completion Certif	icate Deficiencies	Punch List	Commissioning FMSI Substantial/Transfers	
Project Find	der	Q Default V C			80	SEND EDIT DELETE HISTORY GOURL CONTRIBUTION CONTRIBUTICON CONTRI CONTRIBUTIC	v D :: ×
Apps		↓ Number Type	Workflow Status	Assigned To	Reference	✓ PROJECT INFORMATION	> SECTIONS
Q Search		0001 Full Transfer	Active Sent to DSF	Maya SCA PO E - NYC SCA		Project Officer Maya SCA PO E PRC Senior Project Officer Page SCA SPO Staten Island DET	JECT INFORMATION
Tasks						Chief Project Officer Gabriel SCA CPO Staten Island DAT Vice President Ryan SCA PM-CM VP DEF	ES & WORKFLOW
Messages						Closeout Reviewer Mesha SCA Closeout Reviewer CLO - NYC SCA CLO Boro Reviewer Sanjit SCA Boro Reviewer - NYC SCA	SEOUT ITEMS
S Expenses						Borough Staten Island REV	IEWERS
CI Closeout						V DETAILS	IMENTS
し Getting Sta	rted					Number 0001 Type Full Transfer Project Type Capital Improvement Project ✓ DATES & WORKFLOW	
						Workflow Status Active	
			2 Item(s)			Submit	
You last logged in Tu	esday, March 14, 202	23 at 10:13 AM Eastern Time (US & Canada	a)	= 11 🗉		1.9.38.96 - DEMO 🗜	i 🅸 kahua

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)

Ê	Tasks			т800	010 - Q145 TRAINING P	PROJECT #10 - Scho	ool Re	novation 🧪	;	Page SCA SPO Staten Island) -		×
		\leftarrow	≔ List Active	✓ SHARE			8	DELEGATE H	IISTORY	8			
ĉ.	Project Finder		Q = Vier	w: Default 👻				Transfer - Full	l Transfer		Task		×
			FROM	SUBJECT			_(2	View Source	Record >				
	Apps		Maya SCA PO E	Pending SPO Review	Full Transfer 0001 for C000	080462 R075 Greenhou	use, Pl	✓ PROJECT	INFORMAT	ION	>	SECTI	ONS
Q	Search				1 Item(s)			Project Off	ficer	Maya SCA PO E	PROJECT IN	FORMA	TION
		-0						Senior Pro	ject Officer	Page SCA SPO Staten Island Gabriel SCA CPO Staten Island	DATES & WO	RKELO	w
Ē	Tasks							Vice Presid	dent		DEFAULT IT	MS	
-30	Messages							Closeout R	Reviewer	Mesha SCA Closeout Reviewer - NYC SCA	CLOSEOUT	TEMS	
								Boro Revie	ewer	Sanjit SCA Boro Reviewer - NYC SCA	DOCUMENT	ITEMS	
ڻ ا	Getting Started							Borough		Staten Island	REVIEWERS		
								✓ DETAILS			COMMENTS		
											REFERENCE		_
								Number	0001 Full Trai	nsfer			
								Project Typ	pe Capital	Improvement Project			
								V DATES & I		J			
								DAILORI	Shiri LOW				
								Workflow S	3 Pen	ding SPO Review			
							_	Accept	Retu	Im			
You la	ist logged in Tuesday, Mar	ch 14, 20	23 at 10:40 AM Easter	rn Time (US & Canada)	1	■ ■ ■				1.9.38.96 - DEMO	ß	🄯 ka	hua

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

🛱 Tasks	T80010 - Q145 TRAINING	PROJECT #10 - School Re	novation 🧪	Page SCA SPO Staten Island) – 🗆 ×
\leftarrow	≅ List ✓ SHARE	臣	DELEGATE HISTORY	\$	
Project Finder	Q \vec{a} View: Default > FROM SUBJECT Maya SCA PO E Pending SPO Review Full Transfer 0001 for C00 1 ltem(s)	0080462 R075 Greenhouse, Plr	Transfer - Full Transfer View Source Record >	TION Maya SCA PO E	Task 🛄 X > SECTIONS PROJECT INFORMATION
Tasks Image: State st		Confirmation	Senior Project Officer Chief Project Officer Vice President	Page SCA SPO Staten Island Gabriel SCA CPO Staten Island Mesha SCA Closeout Reviewer - NYC SCA Sanjit SCA Boro Reviewer - NYC SCA Staten Island	DETAILS DATES & WORKFLOW DEFAULT ITEMS CLOSEOUT ITEMS DOCUMENT ITEMS REVIEWERS COMMENTS
			V DETAILS Number 0001 Type Full Tra Project Type Capital V DATES & WORKFLOV Workflow Status Per Accept Ret	insfer Improvement Project V nding SPO Review urn	REFERENCE
You last logged in Tuesday, March 14, 202	3 at 10:40 AM Eastern Time (US & Canada)	= 11 E		1.9.38.96 - DEMO	🖾 🎄 kahua

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

🖆 Tasks	SCA Training	8 - □ ×
÷	E List Vit SHARE BLEGATE HISTORY	
Project Finder	Q = View. Default *	Task 🔟 🛛
u	FROM SUBJECT View Source Record >	
Apps	Page SCA SPO Staten Island Pending CPO Review Full Transfer 0001 for C000080462 R075 Gn PROJECT INFORMATION	> SECTIONS
Q Search	1 Item(s) Project Officer Maya SCA PO E	
Tasks	Senior Project Officer Page SCA SPO Staten Island Chief Project Officer Gabriel SCA CPO Staten Island	DATES & WORKFLOW
Messages	Confirmation Mesha SCA Closeout Reviewer - NYC SCA	
(1) Getting Started	Please confirm to continue. Sanjit SCA Boro Reviewer -	
0	CANCEL OK Staten Island	
	↓> ✓ DETAILS	REFERENCE
	Number 0001	
	Type Full Transfer	
	Project Type Capital Improvement Project	
	V DATES & WORKFLOW	
You last logged in Tuesday, March 14, 202	3 at 10.59 AM Eastern Time (US & Canada) 🗮 📗 🗐	🖻 🕸 kahua

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

🖹 Tasks		SCA Training	8 - 🗆 ×
~	≅ List ✓ SHARE	DELEGATE HISTORY	
Project Finder	Q = View: Default *	Transfer - Full Transfer	Task 🔟 🗙
Ĵ	↓ FROM SUBJECT	View Source Record >	
Apps	Gabriel SCA CPO Staten Island Pending CU Gatekeeper Review F	ull Transfer 0001 for C000080 V PROJECT INFORMATION	> SECTIONS
Q Search	1 item(s)	Project Officer Maya SCA PC Senior Project Officer Page SCA SP Chief Project Officer Gabriel SCA (Island	DE PROJECT INFORMATION O Staten Island DETAILS OPD Staten DATEs & WORKFLOW
Messages		Confirmation Reviewer Please confirm to continue.	CLOSEOUT ITEMS CLOSEOUT ITEMS DOCUMENT ITEMS ro Reviewer - REVIEWERS
		CANCEL OK Staten Island	COMMENTS REFERENCE
		Number 0001 Type Full Transfer Project Type Capital Improvement F	Yroject
		✓ DATES & WORKFLOW	
		Assign	
You last logged in Tuesday, March 14,	2023 at 11:28 AM Eastern Time (US & Canada)	= 11 🗉	🖾 🔅 kahua

CR Reviews Full Transfer

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

Ê	Tasks		sc	A Training			8 -		×
	~	≣ List ∨ S	HARE	to to	DELEGATE HISTORY	\$			
Ŀ	Project Finder	Q = View: Default	¥		Transfer - Full Transfer		Task	0	×
_		FROM	SUBJECT		View Source Record >				
	Apps	Javier SCA CU Gatekeepe	r Pending CR Review Full Transfer 0001 fo	r C000080462 R075 Green	PROJECT INFORMAT	TON	>	SECTIO	ONS
0	Search		1 Item(s)		Project Officer	Mava SCA PO F	PROJECT IN	FORMAT	TION
~					Senior Project Officer	Page SCA SPO Staten Island	DETAILS		
-0					Chief Project Officer	Gabriel SCA CPO Staten Island	DATES & WO	RKFLOW	N.
E	Tasks				Vice President		DEFAULT ITE	MS	
P	Messages				Closeout Reviewer	Mesha SCA Closeout Reviewer - NYC SCA	CLOSEOUT	TEMS	
					Boro Reviewer	Saniit SCA Boro Reviewer - NYC			

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

Ê	Tasks			SCA Training					θ	- 1		×
	<i>~</i>	•	≅ Active ✔ SH	ARE	8	DELEGAT	E HISTORY	8				
Ŀ	Project Finder		Q = View: Default *		۵	Transfer	Full Transfer			Task		×
			FROM	SUBJECT		View S	ource Record >					
	Apps		Javier SCA CU Gatekeeper	Pending CR Review Full Transfer 0001 for C000080462 R075	Greenl	Ø	DL-0018 - CL	L-DFLT Permit Exemption Letter		> 5	SECTI	IONS
Q	Search		0	1 Item(s)					PR	DJECT INF	ORMA	TION
``						V CLOS	EOUT ITEMS		DE	AILS		
_	Tasks								DA	TES & WOR	RKFLO	w
-									DE	AULT ITEN	AS	
P	Messages						Source			SEOUT IT	EMS	
da	Getting Started					Ø	CL-0001 - R0	75 02070 DSF Receipt of Salvage II			TEMS	
0	octang our red					Z	CL-0002 - R0	75 02831 Attic stock transmittal	CO	MMENTS		
			4				CL-0003 - R0	75 02862 Warranty	REF	ERENCE		
							CL-0004 - R0	75 02900 O & M Manual				
						Ø	CL-0061 - R0	75 15970 Special Warranty				
							CL-0098 - R0	75 07115 Warranty				
							_					

3. Click the All Items menu> Select Full Transfer to view partial transfer closeout items only

CI C	Closeout	R075 Greenhouse	e, Playground, Flood Elim, Parapets, Windows,	Ext M	lasonry, Roofs, Concrete	1	8 - □ ×
	÷	Closeout Items Substantial	Completion Certificate Deficiencies Punc	h List	Commissioning FN	ISI Substantial/Transfers	
		GENERATE CLOSE	OUT ITEMS NEW		SEND EDIT VIEW HIS	TORY GO URL	
Ë	Project Finder	C. All Items 🗸 C	붛		CL-0001: 02070 - DSF Re	ceipt of Salvage Items	Preview 📋 🖸 🗙
	Apps	X Views Anage Views	- [^{fm}]		V PROJECT INFORMATIO	N	> SECTIONS
Q	Search	All Items			Expense Contract	C000080462 - TE Construction	PROJECT INFORMATION DETAILS
•		Closeout items	CITYE REMOVALS & DEMOLITION		Building	R075	COST
Ē	Tasks	Completed Items	N LINK FENCES AND GATES	- 11	Design Number	D018819	ITEM DATES & WORKE
-		Default Items	DOOR GAME EQUIPMENT		LLWs	113809 - FLOOD ELIMINATION: 113810 -	TEM DATES & WORKF
2	Messages	Full Transfer		-11		PARAPETS	LOG DATES & WORKFL
		Items for AEoR Review	JSCAPING	- 11	General Contractor	Lucy External Contractor E - TE Construction	COMMENTS
CI	Closeout	No Filters	PERATURE CONTROL SYSTEM (BACnet BMS/DDC w/	SCF	Project Officer	Maya SCA PO E - NYC SCA	REFERENCES
d	Cotting Started	Partial Transfer	T MEMBRANE WATERPROOFING FOR FOUNDATION	s	Senior Project Officer	Page SCA SPO Staten Island - NYC SCA	BACKUP REFERENCES
0	Getting Started	Special Transfer			Chief Project Officer	Gabriel SCA CPO Staten Island - NYC SCA	
		Substantial Package	DEEALIIT	-	Closeout Reviewer	Mesha SCA Closeout	

- CI Closeout R075 Greenhouse, Playground, Flood Elim, Parapets, Windows, Ext Masonry, Roofs, Concrete 🧳 θ Closeout Items Substantial Completion Certificate Deficiencies Punch List Substantial/Transfers Commissioning FMSI ← E GENERATE CLOSEOUT ITEMS NEW SEND EDIT VIEW HISTORY GURL B Project Finder 😵 🗈 CL-0001: 02070 - DSF Receipt of Salvage Items Q Full Transfer Y C Preview 🔟 🖸 🗙 X □ ↑ Number CSI Code PROJECT INFORMATION Apps > SECTIONS Full Transfer 0001 PROJECT INFORMATION C000080462 - TE Construction Expense Contract Q Search Closeout Items DETAILS Building R075 COST P Design Number CL-0001 02070 SELECTIVE REMOVALS & DEMOLITION D018819 Tasks ITEM DATES & WORKF ... 113809 - FLOOD ELIMINATION; 113810 -PARAPETS LLWs CL-0002 02831 CHAIN LINK FENCES AND GATES LOG DATES & WORKFL... P Messages CL-0003 Lucy External Contractor E -TE Construction 02862 OUTDOOR GAME EQUIPMENT General Contractor COMMENTS CI Clos REFERENCES CL-0004 02900 LANDSCAPING Maya SCA PO E - NYC SCA Project Officer Senior Project Officer Page SCA SPO Staten Island -NYC SCA BACKUP REFERENCES 15970 TEMPERATURE CONTROL SYSTEM (BACnet BMS/DDC w/SC CL-0061 ധ Getting Started Gabriel SCA CPO Staten Island - NYC SCA Chief Project Officer 07115 SHEET MEMBRANE WATERPROOFING FOR FOUNDATIONS CL-0098 Closeout Reviewer Mesha SCA Closeout Reviewer - NYC SCA Default Items Boro Reviewer Sanjit SCA Boro Reviewer -NYC SCA DL-0001 CL-DFLT CL-DEFAULT Boro Critical Personnel Rose SCA Boro Critical Personnel - NYC SCA DL-0002 CL-DFLT CL-DEFAULT DL-0003 CL-DFLT CL-DEFAULT DETAILS 2 DL-0009 CL-DFLT CL-DEFAULT Accept 16 Item(s) 袋 kahua = I E
- 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

Ê	Tasks		R075 Gree	nhouse, Playground, Flood Elim, Pa	arapets, Windows, Ext M	Masonry, Roofs, Concrete	e /	θ	-		×
		←	≔ List Active ✔ SH	ARE	방	DELEGATE HISTORY	₿				
Ŀ	Project Finder		Q = View: Default *			Transfer - Full Transfer			Task		×
	Apps		FROM	SUBJECT		View Source Record >	LION			FOTIO	
Q	Search		Javier SCA CU Gatekeeper	1 Item(s)	r C000080462 R075 Greeni	Project Officer Senior Project Officer	Maya SCA PO E Page SCA SPO Staten Island	PROJ	ECT INF	ORMAT	ON
e	Tasks					Chief Project Officer Vice President	Gabriel SCA CPO Staten Island	DATE	S & WOF	KFLOW	
P	Messages					Closeout Reviewer Boro Reviewer	Mesha SCA Closeout Reviewer - NYC SCA Sanjit SCA Boro Reviewer - NYC	CLOS	EOUT IT	EMS	
CI	Closeout					Borough	SCA Staten Island	REVIE	WERS		
ሳ	Getting Started					✓ DETAILS		REFE	RENCE		
						Number 0001 Type Full Trr Project Type Capital V DATES & WORKFLOV Workflow Dus Pe Accept Ret	nsfer Improvement Project V unding CR Review				
You la	ast logged in Tuesday, Mar	ch 14, 202:	3 at 10:51 AM Eastern Time (US	& Canada)				ŵ	\$	🏂 kat	ua

* 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.

nny Test2	2	Chief Project Office	r Savetri Munes
			y Zhou - S
	Validation Messages:		y Zhou - S
	Please go to the Closeout item included in this transfer.	s and accept all Closeout i	n Island tems
			ок
		Number	0001
		Туре	Partial Transfer
Click O	K for confirmation to accept t	he transfer.	
DSF Red	ceipt of Salvage Items in 0026	View Source Record >	
w Partial	Tr{ 0001 { 00000004	01 0001 0075 00070 [DSF
m(s)	Confirmation	501 V	Varr
	Please confirm to continue.		

CANCEL

OK

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
- Option 1: Click Accept to confirm the special transfer.
 Option 2: Click Return (you will need to provide a reason).

6.

Ê	Tasks			R07	75 Greenhe	ouse, Playground, Flood Elim, Parapets, Windov	vs, Ext Masonry, Roofs, Concrete 🛛 🥜	8 - □ ×								
		\leftarrow	I	DELEGA	TE HISTO	8Y 1										
Ŀ	Project Finder		Task	Transfer View	r - Full Trar Source Recor	ull Transfer ree Record >										
	Apps				Effective Date is required											
Q	Search				Number	Name	Effective Date	> SECTIONS								
e	Tasks				1	Notice to Proceed	*	PROJECT INFORMATION								
P	Mosesaas				2	Notice of Substantial Completion	*	DATES & WORKFLOW								
Ľ	messages				3	Warranties and Guarantees	*	DEFAULT ITEMS								
Ċ	Getting Started				4	Certificate of Training	*	CLOSEOUT ITEMS								
					5	Copy of Signed Transfer of As-Builts to A&E CADD Unit	*	DOCUMENT ITEMS								
					6	Notice of Project Transfer	*	COMMENTS								
					7	Copy of Signed Transfer of Documents to Custodian	*	REFERENCE								
					8	O & M Manuals	*									
				≁ REV	VIEWERS	Accept Return										
You l	ast logged in Tuesday, Ma	rch 14, 202	3 at 12:17	PM Eastern	Time (US & Ca	nada) 📃 📘 🗐		🖾 🏘 kahua								

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

Ê	Tasks				SCA Training		Gabriel SCA CPO Staten Island	-		×
		←	≅ List Active ✔	SHARE	방	DELEGATE HISTORY	8			
ů	Project Finder		Q = View: Def	ault -	Đ	Transfer - Full Transfer		Task	0	×
	Apps		FROM Sanjit SCA Boro Revie	SUBJECT ever Pending CPO Review Full Tr	ansfer 0001 for C000080462 R075 Gr	VIEW Source Record >	ΓΙΟΝ	,	SECTI	ONS
Q	Search			1 ltem(s)		Project Officer Senior Project Officer	Maya SCA PO E Page SCA SPO Staten Island	PROJECT IN DETAILS	FORMA	TION
P	Tasks					Ch		×	LO	N
P	Messages				₿.	Clt Bo Please cor Notice of F	nfirm the following Documents to DocuSi Project Transfer	ign.	IS VIS	
Ċ	Getting Started					Notice of I Bo	Continue	Cancel		
						Number 0001				
						Type Full Tra Project Type Capital	Improvement Project			
						V DATES & WORKFLOW	V			
						Workflow Status Per	nding CPO Review			
You la	ast logged in Tuesday, Mar	ch 14, 202	3 at 10:59 AM Eastern Tim	e (US & Canada)	≡ ∎ ≣		1.9.38.96 - DEMO	£۵	袋 ka	ihua

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

🖹 Tasks	SCA Training	Gabriel SCA CPO Staten Islan	• – • ×
~	i≡ Lat v SHARE	DELEGATE HISTORY	
Project Finder Project Finder Apps Search Tasks C Getting Started	Image: State in the second	DELEGATE HISTORY Transfer - Full Transfer View Source Record > ver Source Record > Serier Source Record > Closeout Reviewer - NYC SCA Boro Reviewer Son Reviewer Source Reviewer	Task V × > SECTIONS PROJECT INFORMATION DETAILS DATES & WORKFLOW DEFAULT ITEMS CLOSEOUT ITEMS DOCUMENT ITEMS REVIEWERS COMMENTS REFERENCE
		Workflow Status Transfer to DSF	
You last logged in Tuesday, March 14, 202	t at 10:59 AM Eastern Time (US & Canada) 📃 📘	1.9.38.96 - DEMO	🖾 🎄 kahua

5. Click **Ok** to confirm



BR Marks Special Transfer approved by DSF

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

Ŀ	Project Finder			C0000804	162 - R075 Greenhouse, Playground, Flood Elim, Parapets, 🧨 😢 Joel Joesph SCA Sandbox	-		×
		\leftarrow	ALL	PROJECTS	MY PROJECTS RECENT PROJECTS Q			
£.	Project Finder	-0	ħ	SCA UAT	> Hard Bid > Staten Island > District 31S SELECT			
L		_		Number	Name			
	Apps		÷	0026	Danny Test	☆	1	
Q	Search		÷	0028	Danny Test2	☆	ı	
			÷	C000080462	R075 Greenhouse, Playground, Flood Elim, Parapets, Windows, Ext Mas	☆	0	
Ê	Tasks							

2. Go to Apps> All Apps> Closeout

	Apps	C000080462 - R075 Greer	nhouse, Playground, Flood Elim, Parapets, 🧨 😍 Erby Keesha – 🗆 🗙
	\leftarrow	Recent	Q Bearch
Ŀ	Project Finder	All Apps	Recent
	Apps	Administration	U Getting Started
0	Same	Cost Management	CI Closeout
~	Search	Document Management	E Punch Lists
Ê	Tasks		LOG Dev Logs

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

CI C	loseout			R075 Greenh	75 Greenhouse, Playground, Flood Elim, Parapets, Windows, Ext Masonry, Roof				1	Sanjit SCA Boro Reviewer	(-)	□ ×
		←	Closeout	Items Substantial	Completion Certificate	e Deficiencies	Punch L	ist Commissioning	FMSI	Substantial/Transfers		
Ŀ	Project Finder		Q Defa	ult ~ C							٢	8
	Apps		↓ Number	Туре	Workflow Status	2 ned To	References	DEBUG				
0	a 1		0001	Full Transfer	In Transit to DSF			25676981 25816020 nyc	sca_Trans	fers.Transfer nycsca_Transfers.NoW	orkflow\Co	mpleted
Q	Search		0001	Substantial Package	Sent to DSF			25676981 25740058 nyc	sca_Trans	fers.Transfer nycsca_Transfers.NoW	orkflow\DS	FSent
Ê	Tasks											

4. Click DSF Approved

() Getting Started				✓ DETAILS	REFER	RENCE
				Number 0001 Type Full Transfer Project Type Capital Improvement Project		
	2 Item(s)			DSF Approved		
You last logged in Tuesday, March 14, 2023	at 12:17 PM Eastern Time (US & Canada)	= 1	E	1.9.38.96 - DEMO	Ē	袋 kahua