



Partial Transfer Training Guide

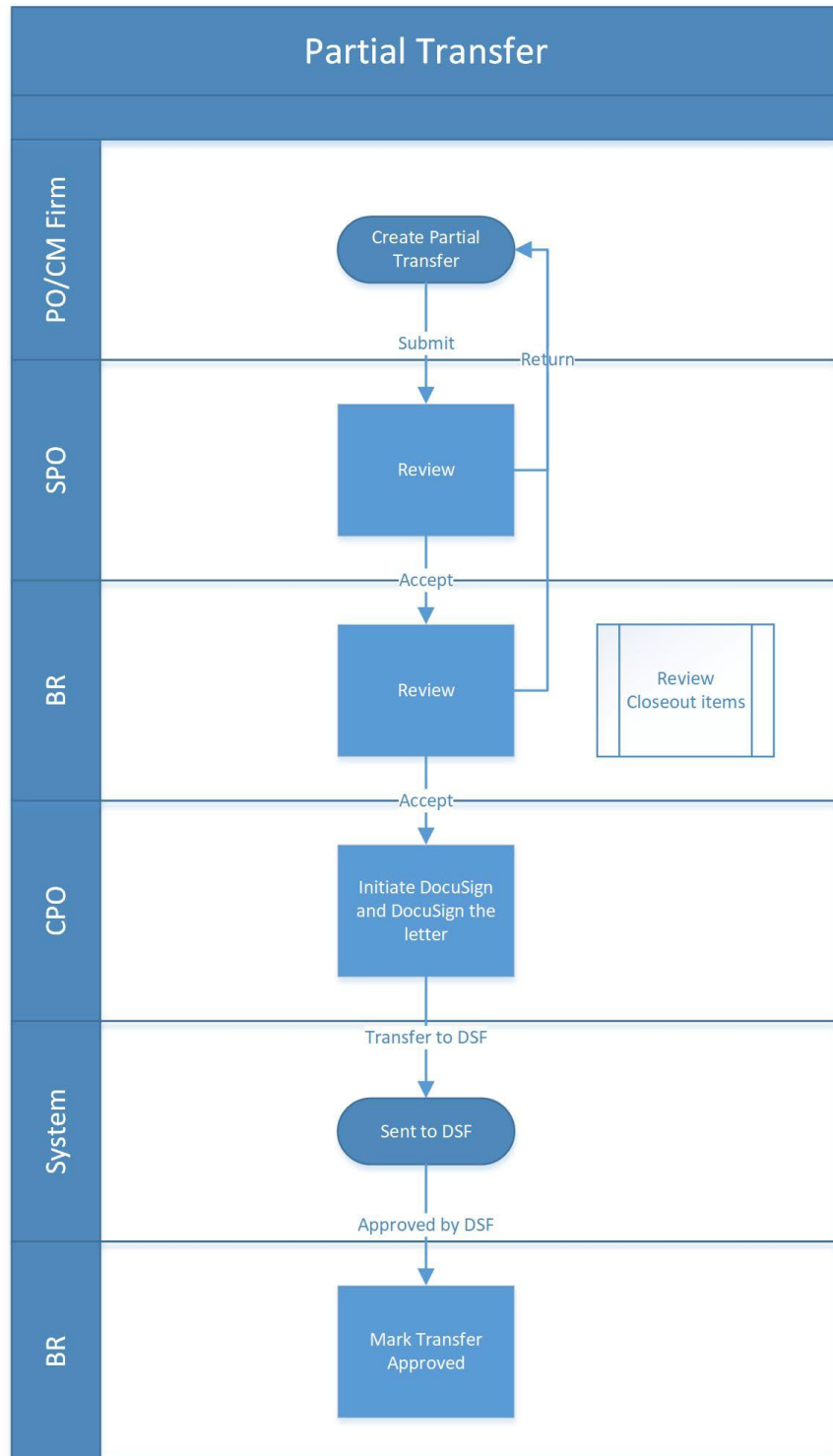
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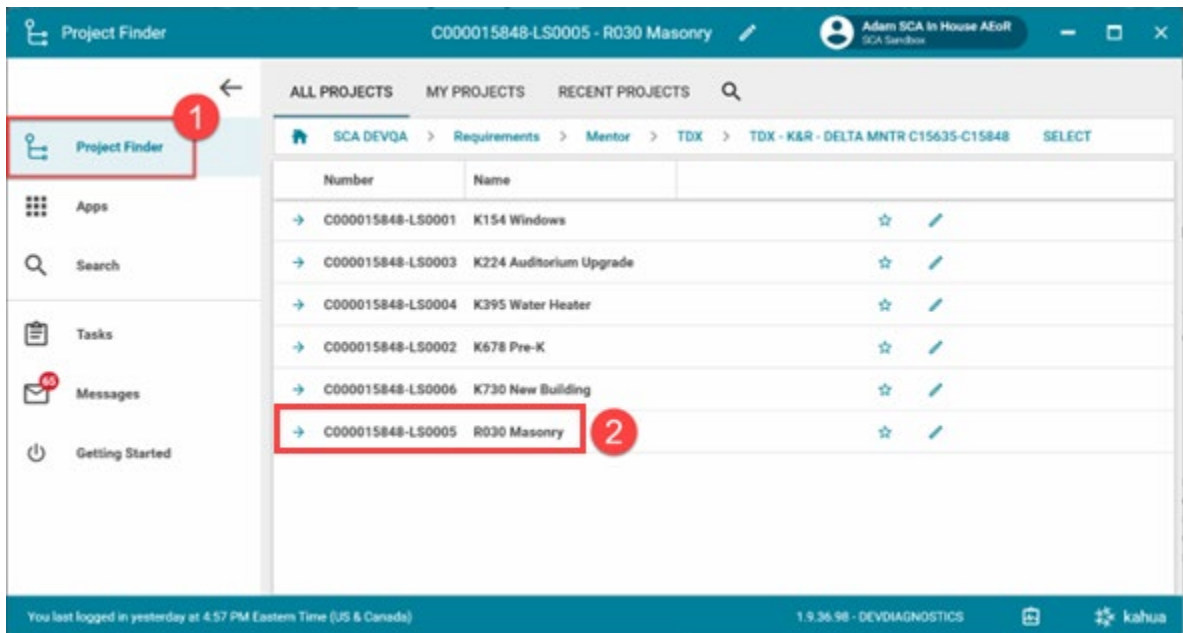
Workflow



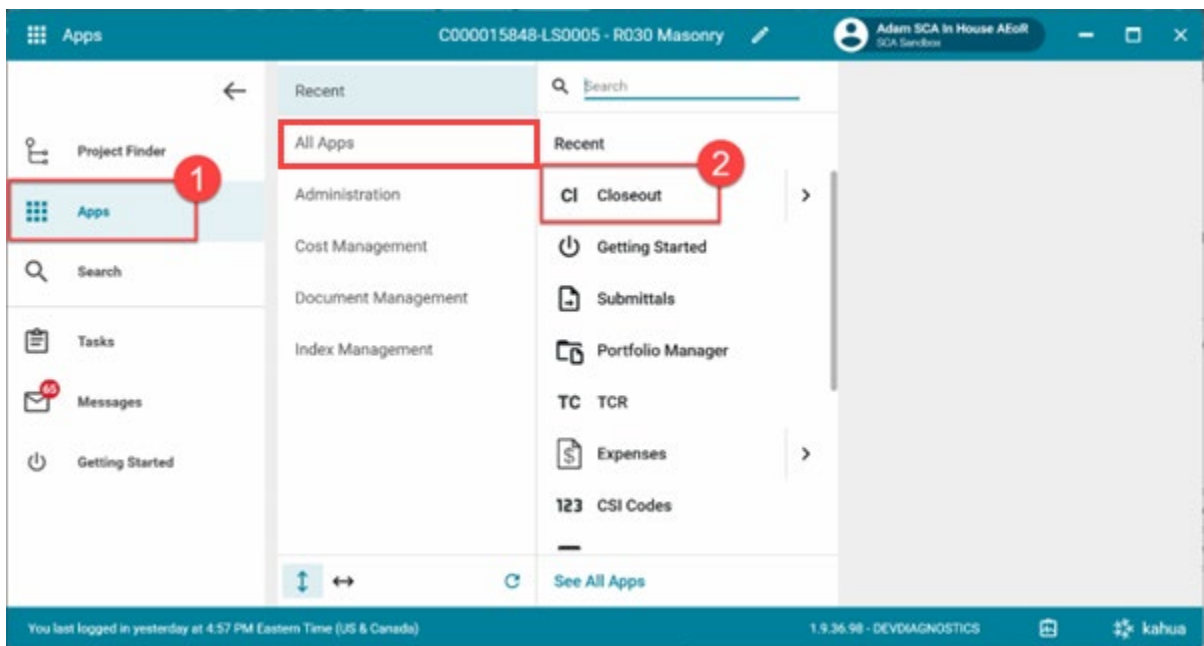
Step-by-Step Instructions

PO/CM Firm Creates Partial Transfer

1. Go to Project Finder > Select the desired project



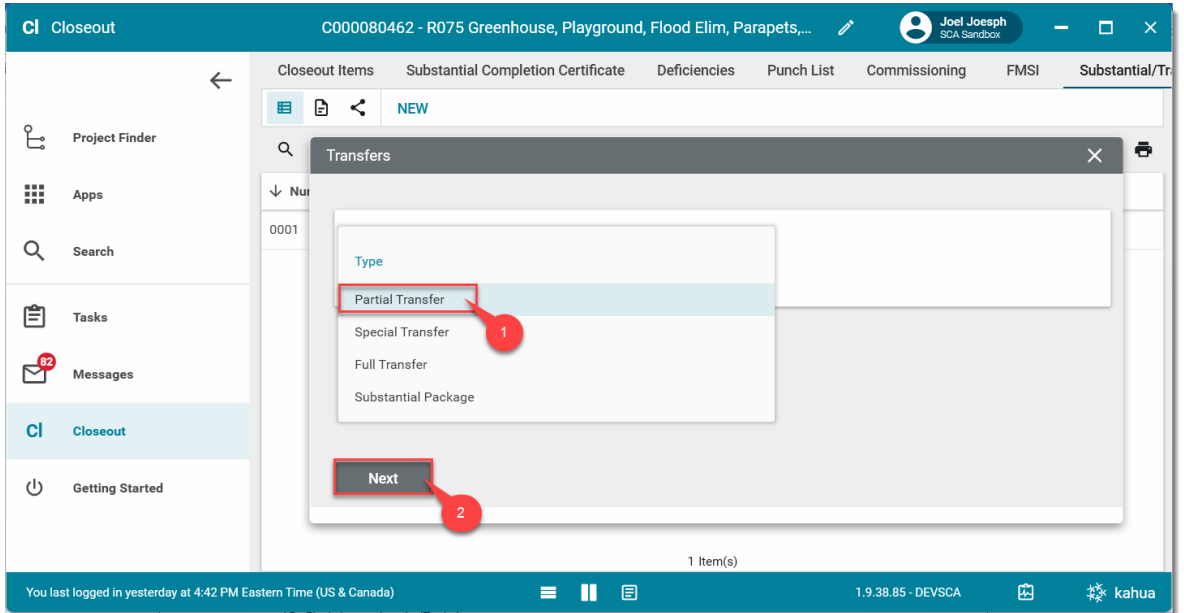
2. Go to **Apps** > **All Apps**> Select the **Closeout** App



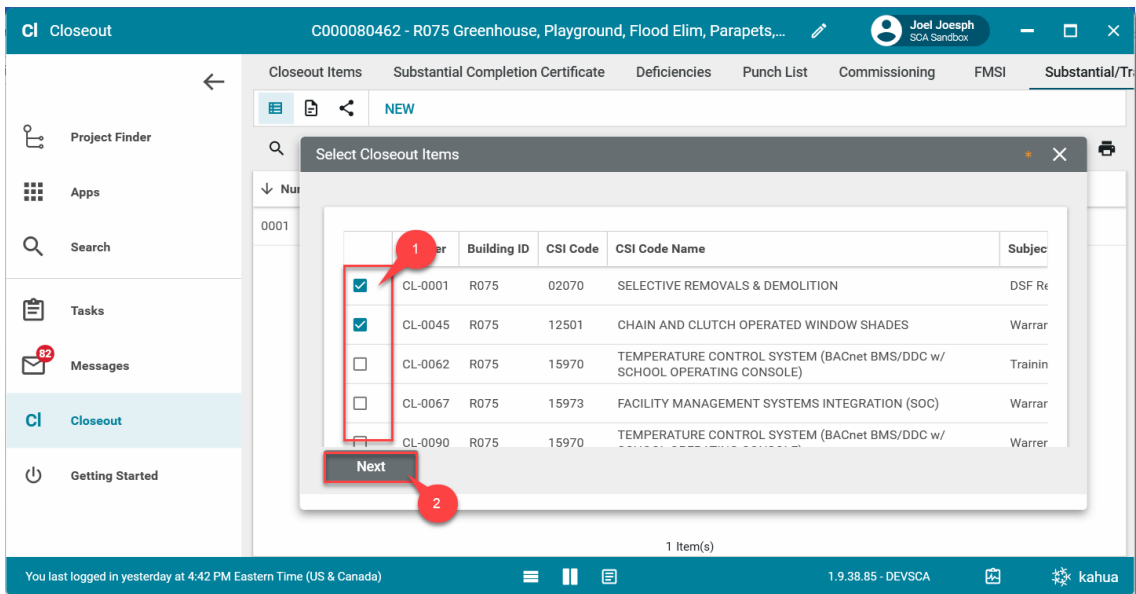
3. Click the **Substantial/Transfers** tab> Click **New**



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

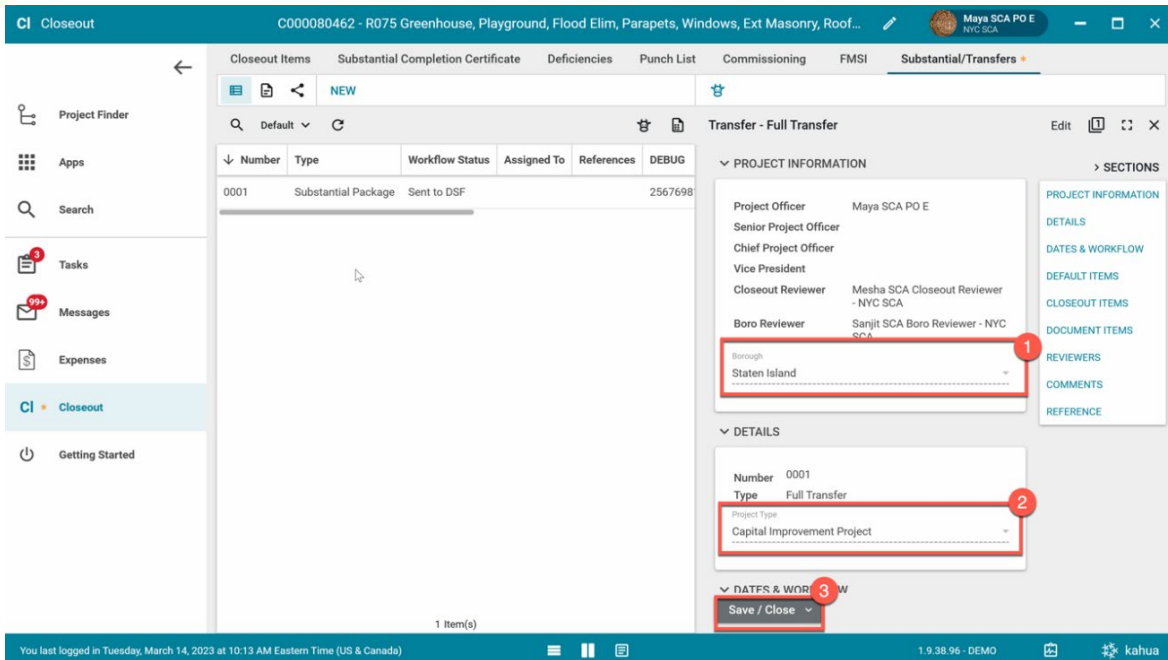


5. In the Select Closeout Items window, check all closeout items to include in transfer
6. Click **Next**



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

- Click **Save/Close** to save a **Draft**. You have not submitted the transfer at this point.



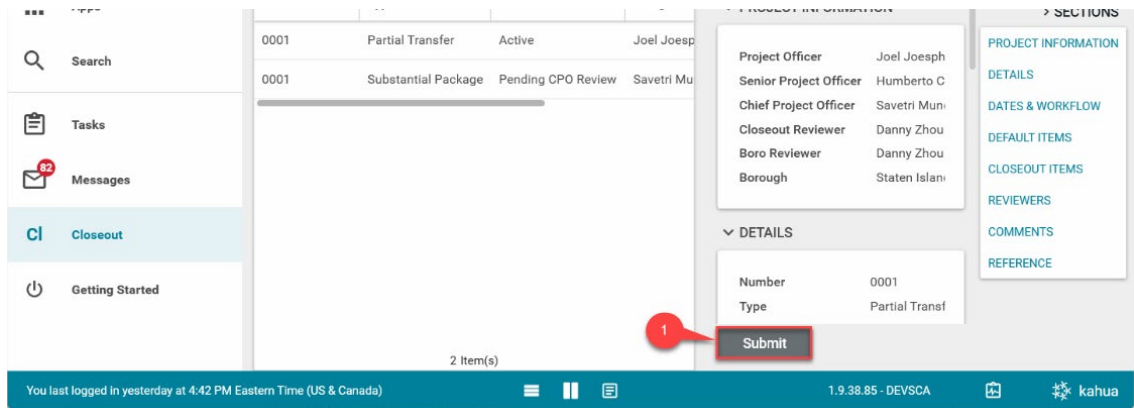
Edit Partial Transfer

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

- Click **Edit** at the top
- Make your changes and click **Save/Close**

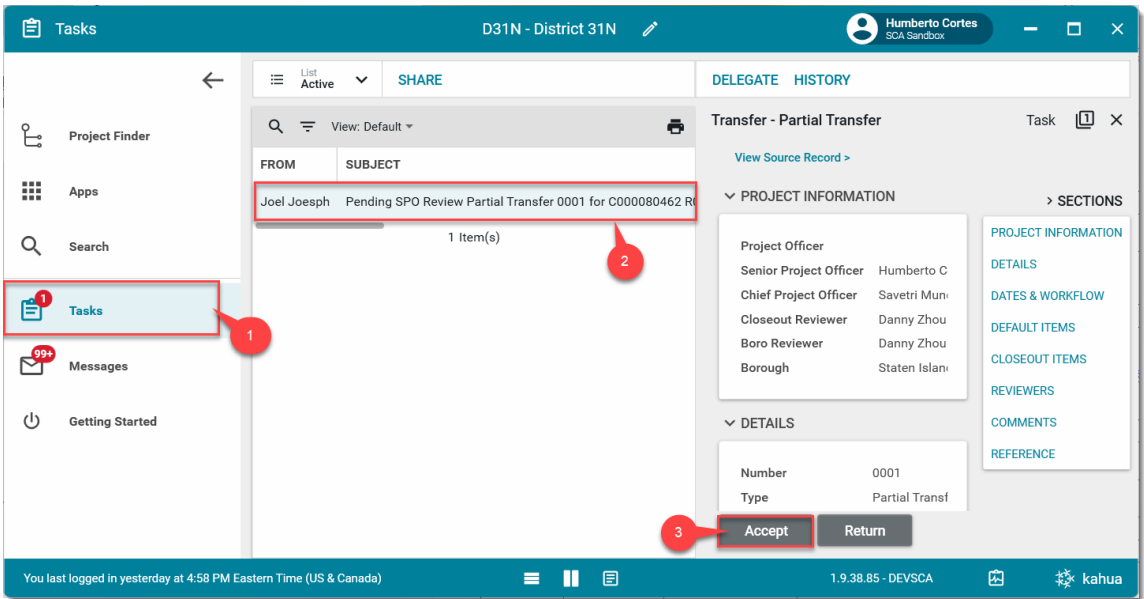


- Click **Submit**

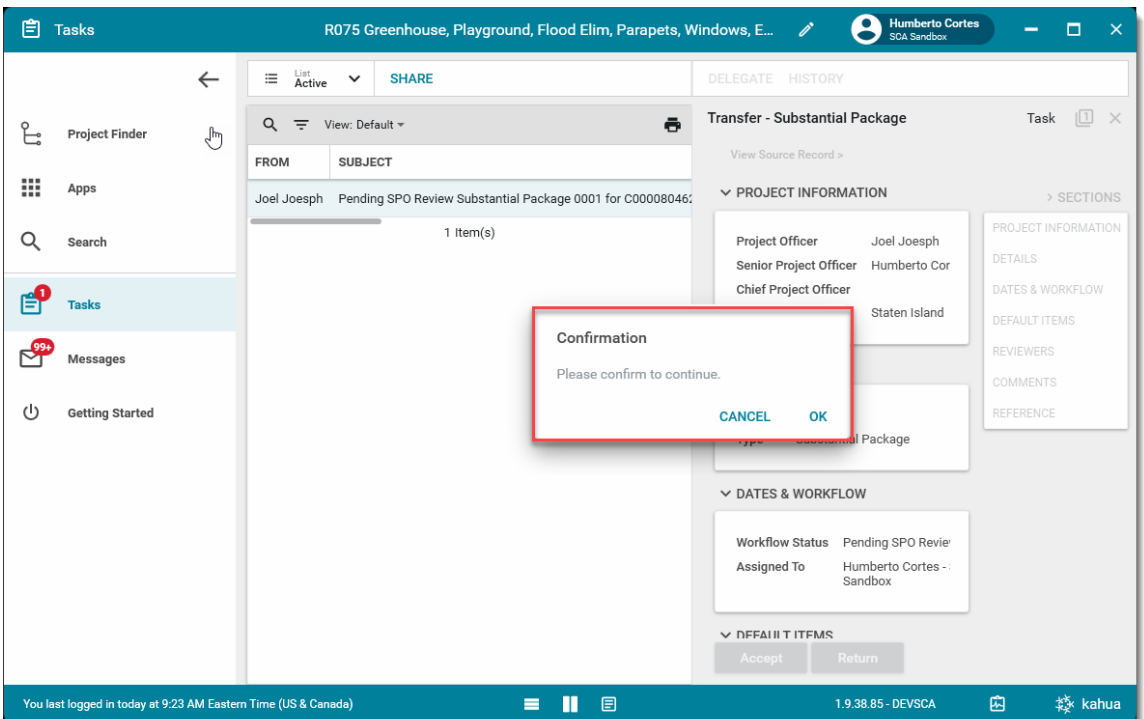


SPO Reviews Partial Transfer

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



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



Borough Reviewer (BR) Accepts or Returns Partial Transfer

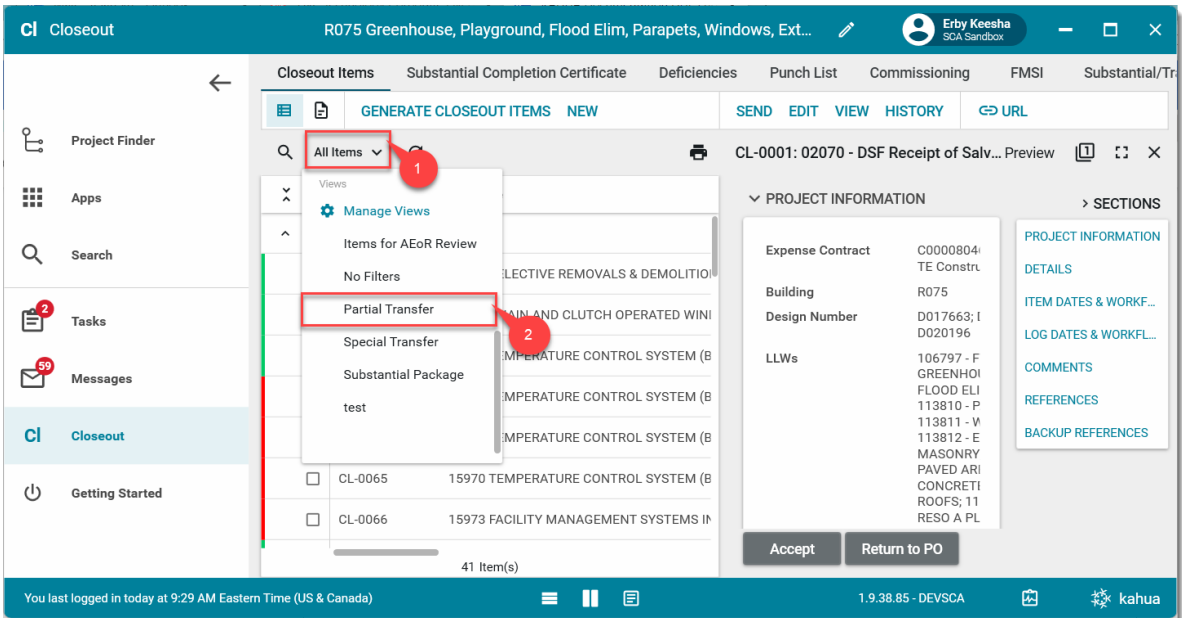
1. Go to **Tasks** and select the **Pending BR Review Partial Transfer** task

The screenshot shows the 'Tasks' application interface. The left sidebar has a 'Tasks' icon highlighted with a red box and a red circle containing the number '1'. The main content area shows a table with one item: 'Humberto Cortes Pending BR Review Partial Transfer 0001 for C00008046', which is also highlighted with a red box and a red circle containing the number '2'. The right sidebar shows the 'Transfer - Partial Transfer' details, including a 'ROJECT INFORMATION' section with roles like Project Officer, Senior Project Officer, Chief Project Officer, Closeout Reviewer, Boro Reviewer, and Borough, and a 'DETAILS' section with a 'Number' field.

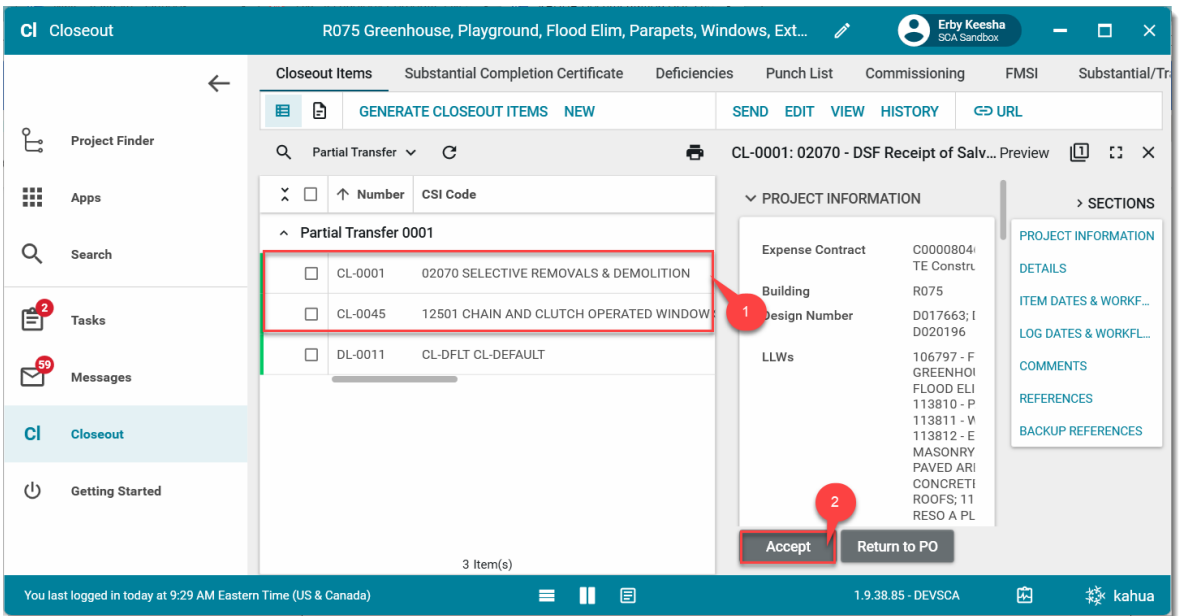
2. **Closeout Items** section: Click any of the **links** to redirect you to the Closeout Items app

The screenshot shows the 'Tasks' application interface with the 'Closeout Items' section expanded. The 'Closeout Items' section contains a list of items: 'CL-0001 - R075 02070 DSF Receipt' and 'CL-0045 - R075 12501 Warranty'. The first item is highlighted with a red box and a red circle containing the number '1'. The right sidebar shows the 'SECTION'S' menu with 'CLOSEOUT ITEMS' selected.

3. Click the **All Items** menu> Select **Partial 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

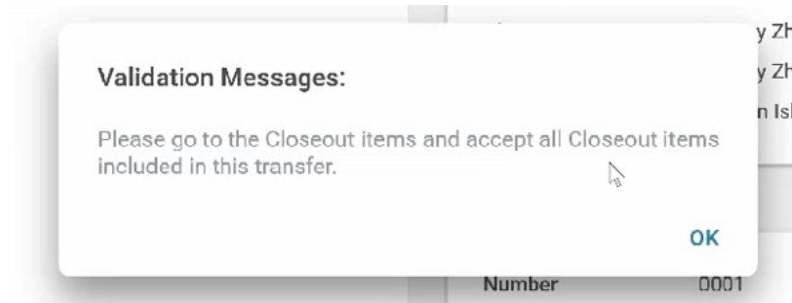


5. Once every closeout item has been accepted by BR, go back to the task and click **Accept** to accept the entire Partial Transfer package.

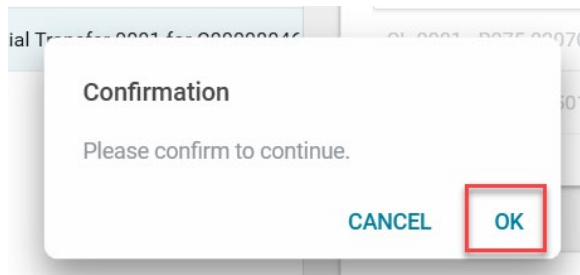


* If one of the closeout items included in the package is not accepted by BR, and BR tries to click

accept button, a warning message will pop up.

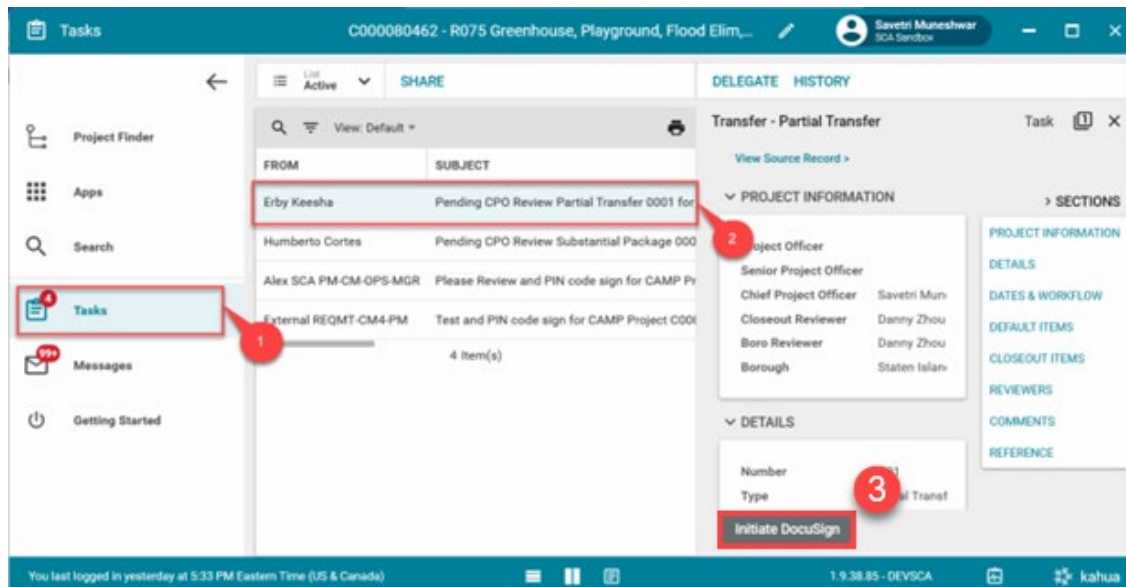


6. Click OK for confirmation to accept the transfer.



CPO Initiates DocuSign

1. Go to **Tasks** and select the Pending **CPO Review Partial Transfer** task
2. Click **Initiate DocuSign** start the eSignature process



3. Click **Continue** to confirm

CPO DocuSigns Notice Letters and Transfer to DSF

The Notice letters are DocuSigned by CPO. Then, the Partial Transfer is sent 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**

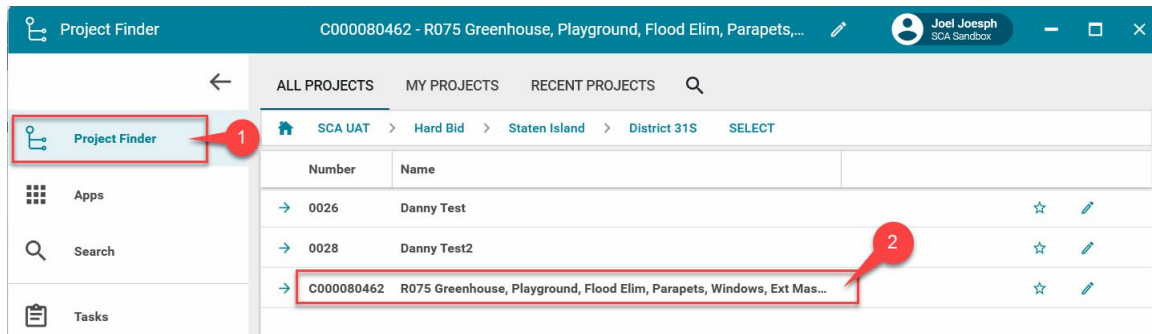
The screenshot shows the Kahua Tasks interface. The main content area displays a task titled "Transfer - Partial Transfer". Below the task title, there is a "View Source Record" link and a "PROJECT INFORMATION" section. The "DETAILS" section is expanded, showing fields for "Number" (0001) and "Type" (Partial Trans). A red box highlights the "Transfer to DSF" button in the DETAILS section. The left sidebar shows navigation options like Project Finder, Apps, Search, Tasks, Messages, and Getting Started. The top bar shows the user's name "Savetri Muneshwar" and the task ID "C000080462 - R075 Greenhouse, Playground, Flood Elim,...".

5. Click **Ok** to confirm

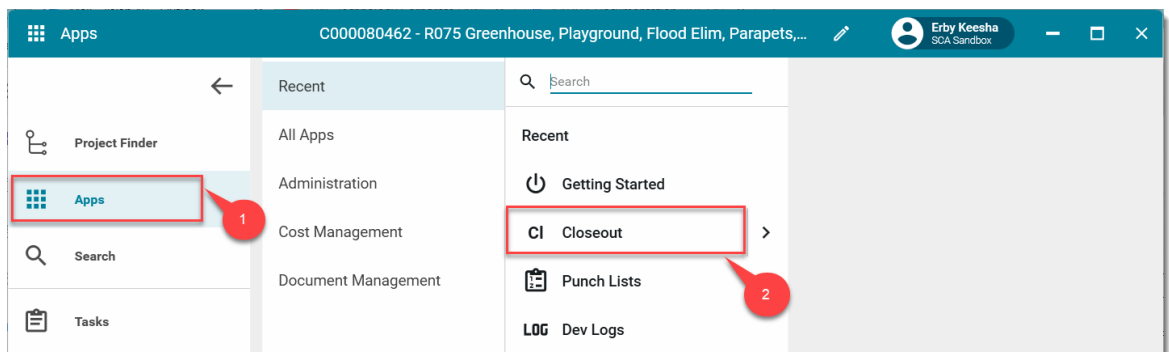
The screenshot shows the Kahua Tasks interface with a task titled "Transfer - Substantial Package". A confirmation dialog box is overlaid on the task details, containing the text "Confirmation" and "Please confirm to continue." Below the text are two buttons: "CANCEL" and "OK". The "OK" button is highlighted with a red box. The background shows the task details, including "PROJECT INFORMATION" and "DETAILS" sections. The left sidebar and top bar are consistent with the previous screenshot.

BR Marks Partial Transfer approved by DSF

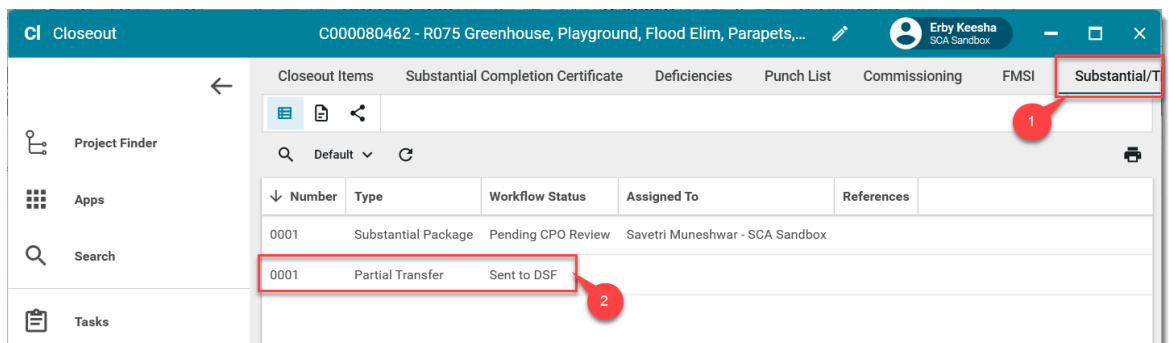
8. Go to Project Finder > Navigate to the desired project



9. Go to Apps > All Apps > Closeout



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



4. Click **DSF Approved**

