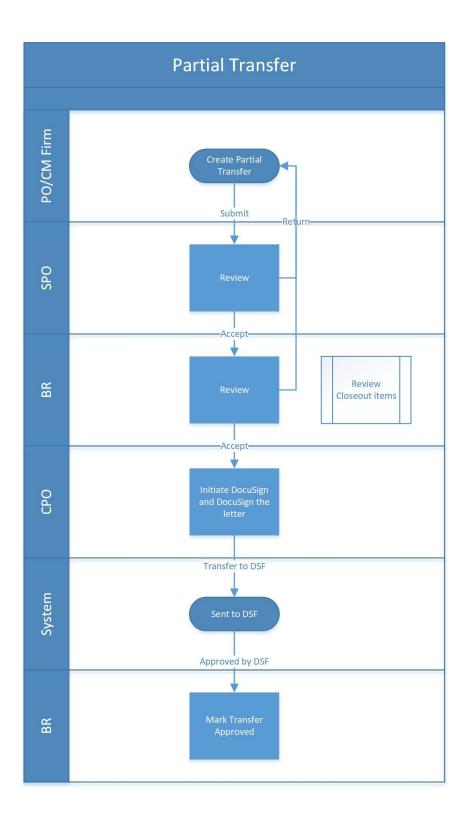


Partial Transfer Training Guide

Date Created: 3/17/2023 Date Updated: 7/25/2023

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

1. Go to Project Finder > Select the desired project

۴.	Project Finder	C000015848-LS0005 - R030 Masonry	Adam SCA in House AEoR	- 🗆 ×
	e t	ALL PROJECTS MY PROJECTS RECENT PROJECTS	۹	
£:	Project Finder	Requirements > Mentor > TDX	> TDX - K&R - DELTA MNTR C15635-C15848	SELECT
	Apps	Number Name → C000015848-LS0001 K154 Windows	* /	
Q	Search	→ C000015848-LS0003 K224 Auditorium Upgrade	* /	
Ê	Tasks	→ C000015848-LS0004 K395 Water Heater	* /	
- -	Messages	C000015848-LS0002 K678 Pre-K C000015848-LS0006 K730 New Building	\$ / \$ /	
ل ان	Getting Started	→ C000015848-LS0005 R030 Masonry	* /	
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2. Go to Apps > All Apps> Select the Closeout App

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	Apps	Administration	CI Closeout	>			
٩	Search	Cost Management Document Management	() Getting Started Submittals				
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		‡ ↔ c	See All Apps				
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3. Click the Substantial/Transfers tab> Click New

CI Closeout		C000080462 - R075 Greenhouse, Playground, Flood Elim, Parapets, Windows, Ext Masonry, Roof) -	×
	4	Closeout Items	Substantial Completion Certificate	Deficiencies	Punch List	Commissioning	FMSI	Substantial/Transfers		
		• • <	NEW			8				

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

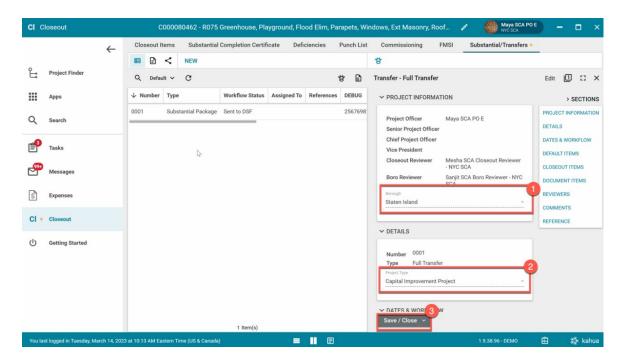
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P	Messages	Full Transfer Substantial Package	
CI	Closeout		
ባ	Getting Started	Next	
		1 Item(s)	
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- 5. In the Select Closeout Items window, check all closeout items to include in transfer
- 6. Click Next

ci c	Cl Closeout C000080462 - R075 Greenhouse, Playground, Flood Elim, Parapets, / SJoel Joesph ScA Sandbox								nd, Flood Elim, Parapets,	Joel Joes SCA Sandbo	ph –	□ ×
		←	Close	eout Item	S	Substantia	al Completion	Certificate	Deficiencies Punch List	Commissioning	FMSI	Substantial/Tr
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P	Messages					CL-0062	R075	15970	TEMPERATURE CONTROL SYSTE SCHOOL OPERATING CONSOLE)	M (BACnet BMS/DDC w/	Traini	n
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- 7. Project Information section: If this is a Mentor project, select the correct Borough
- 8. **Details** section: Enter **Transfer Description** (Required)

9. 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.

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

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Project Finder		Q	Defa	ult 🗸	C	ē	Transfer - Partial 1 fer	Preview		:3	×

10. Click Submit

					-		1011		> 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	PROJECT	INFORMATION
Ê P	Tasks Messages					Chief Project Officer Closeout Reviewer Boro Reviewer Borough	Savetri Mun Danny Zhou Danny Zhou Staten Islan	DATES & DEFAULT CLOSEOU REVIEWE	JT ITEMS
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SPO Reviews Partial Transfer

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

Ê	Tasks	D31N - District 31N 🧳	Humberto Cortes – 🗆 🗙
	\leftarrow	≅ List ∨ SHARE	DELEGATE HISTORY
نا 	Project Finder Apps	Q = View: Default ~ FROM SUBJECT Joel Joesph Pending SPO Review Partial Transfer 0001 for C000080462 R	Transfer - Partial Transfer Task I × View Source Record > > SECTIONS
Q	Search	1 Item(s)	Project Officer PROJECT INFORMATION Senior Project Officer Humberto C DETAILS
e	Tasks		Chief Project Officer Savetri Mun DATES & WORKFLOW Closeout Reviewer Danny Zhou Boro Reviewer Danny Zhou
99	Messages		Borough Staten Islan: CLOSEOUT ITEMS REVIEWERS
Ċ	Getting Started	3	COMMENTS REFERENCE COMMENTS REFERENCE Accept Return
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3. Click **OK** to confirm the transfer

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		←	E List Character SHARE			
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~		0	FROM SUBJECT		View Source Record >	
	Apps		Joel Joesph Pending SPO Review Substantial	Package 0001 for C000080462	✓ PROJECT INFORMATION	> SECTIONS
Q	Search		1 Item(s)		Project Officer Joel Joesph	PROJECT INFORMATION
					Senior Project Officer Humberto Cor	DETAILS
1	Tasks				Chief Project Officer Staten Island	DATES & WORKFLOW
P	Messages			Confirmation		REVIEWERS
	meoodgeo			Please confirm to conti	inue.	COMMENTS
ባ	Getting Started				CANCEL OK	REFERENCE
					Package	
					✓ DATES & WORKFLOW	
					Workflow Status Pending SPO Revie	
					Assigned To Humberto Cortes - Sandbox	
					Guildox	
					DFFAULT ITEMS Accept Return	
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Borough Reviewer (BR) Accepts or Returns Partial Transfer

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

🖹 Tasks		R075 Gre	enhouse, Playground, Floo	d Elim, Parapets, Wi	indows, Ext 🧪 😫 Erby	Keesha Sandbox — 🗆 🗙
	\leftarrow	≡ ^{List} ≺	SHARE		DELEGATE HISTORY	
	Finder	Q = View: De	sfault ▼ SUBJECT	÷	Transfer - Partial Transfer This task was delegated to Erby Kee the action on behalf of Danny Zhou	
Apps Q Search		Humberto Cortes	Pending BR Review Partial Transf 1 Item(s)	er 0001 for C00008046	View Source Record > 2 ROJECT INFORMATION	> SECTIONS
Tasks		1			Project Officer Senior Project Officer Chief Project Officer Savetri Mu	PROJECT INFORMATION DETAILS JIN: DATES & WORKFLOW
Messa					Closeout Reviewer Danny Zho Boro Reviewer Danny Zho Borough Staten Isla	
ل Getting	J Started				✓ DETAILS	COMMENTS
					Save Accept	REFERENCE
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2. Closeout Items section: Click any of the links to redirect you to the Closeout Items app

Ê	Tasks		R075 Gre	enhouse, Playground, Flood Elim, Parapets, W	Vindows, Ext 🧪 🙁 Erby Keesha SCA Sandbox	– – ×
		←	≔ ^{List} ≁	SHARE	DELEGATE HISTORY	
ĉ	Project Finder		Q = View: De	fault - 🗗	Transfer - Partial Transfer This task was delegated to Erby Keesha. T	Task 🕕 🗙
			FROM	SUBJECT	the action on behalf of Danny Zhou.	te person is completing
	Apps		Humberto Cortes	Pending BR Review Partial Transfer 0001 for C00008046	View Source Record >	
Q	Search			1 Item(s)	✓ CLOSEOUT ITEMS	> SECTIONS
						PROJECT INFORMATION
	Tasks				Source	DETAILS
P					CL-0001 - R075 02070 DSF Receipt	DATES & WORKFLOW
	Messages				CL-0045 - R075 12501 Warranty	1 EFAULT ITEMS
сU	Getting Started					CLOSEOUT ITEMS
					✓ REVIEWERS	REVIEWERS
						REFERENCE
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		_			Save Accept Retur	n
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3. Click the All Items menu> Select Partial Transfer to view partial transfer closeout items only

ci c	loseout	R075 Greenhouse, Pl	ayground, Flood Elim, Parapets, W	indows, Ext 🧷	Erby Keesha SCA Sandbox	×		
	←	Closeout Items Substantia	l Completion Certificate Deficienc	ies Punch List Cor	nmissioning	FMSI Substantial/Tr		
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Ŀ	Project Finder	Q All Items V	ē	CL-0001: 02070 - DSF	Receipt of Salv	Preview 🗓 🚼 🗙		
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Q	Search	Items for AEoR Review No Filters	LECTIVE REMOVALS & DEMOLITIO	Expense Contract	C0000804 TE Constru	PROJECT INFORMATION		
4 2	Tasks	Partial Transfer	NIN AND CLUTCH OPERATED WINI	Building Design Number	R075 D017663; I D020196	ITEM DATES & WORKF		
e Bernere Bern	Messages	Special Transfer Substantial Package	MPERATURE CONTROL SYSTEM (B	LLWs	106797 - F GREENHOI FLOOD ELI	COMMENTS		
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Ŭ		CL-0066 1597	73 FACILITY MANAGEMENT SYSTEMS IN		ROOFS; 11 RESO A PL			
		41	Accept Retu	rn to PO				
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4. Click Accept or Return to PO for each of the Closeout Items starting with CL-XXXX

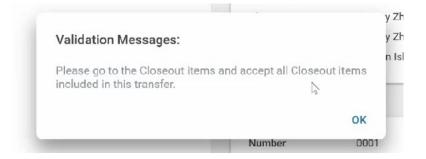
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	←	Closeout Items Substantial Completion Certificate Deficie	ncies Punch List Commissioning	ies Punch List Commissioning FMSI Substantial/Tr				
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Q	Search	 Partial Transfer 0001 	Expense Contract C0000804	PROJECT INFORMATION				
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*	Tasks	CL-0045 12501 CHAIN AND CLUTCH OPERATED WINDO	W Design Number D017663; I D020196	LOG DATES & WORKFL				
5 9	Messages	DL-0011 CL-DEFAULT	LLWs 106797 - F GREENHOU FLOOD ELI	COMMENTS				
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ብ	Getting Started		2 ROOFS; 11 RESO A PL					
		3 Item(s)	Accept Return to PO					
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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.

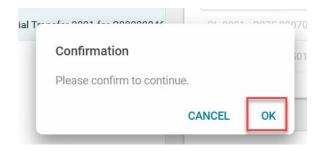
() Getting Started			✓ DETAILS		COMMENTS
			Save Accept Return		REFERENCE
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* If one of the closeout items included in the package is not accepted by BR, and BR tries to click

accept button, a warning message will pop up.

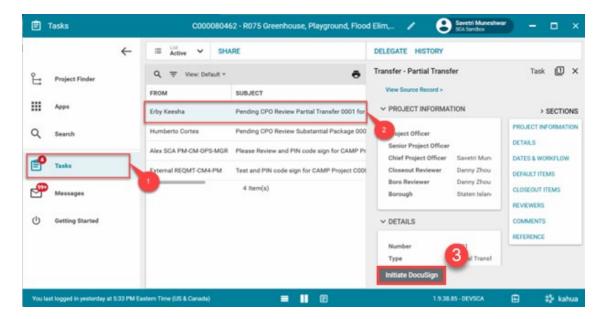


6. Click OK for confirmation to accept the transfer.



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 <u>here</u> 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

Ê	Tasks	C0000804	62 - R075 Greenhouse, Playground, Floo	od Elim, 🧪 😮 Savetri Muneshwa	" – 🗆 ×			
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	Apps	FROM Savetri Muneshwar	SUBJECT Pending CPO DocuSign Partial Transfer 0001	✓ PROJECT INFORMATION	> SECTIONS			
Q	Search	Humberto Cortes	Pending CPO Review Substantial Package 000	Floject officer	PROJECT INFORMATION			
4	Tasks	Alex SCA PM-CM-OPS-MGR	Please Review and PIN code sign for CAMP P	Chief Project Officer Savetri Mun	DATES & WORKFLOW			
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				Number Type Transfer to DSF	REFERENCE			
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5. Click Ok to confirm

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			External REQMT-CM4-PM	Test and PIN code sign for CAMP Project CO	00014937-JS0002 JOC Ser	Senior Project Officer		
	Tasks			3 Item(s)		Chief Project Officer Borough	Savetri Muneshwar Staten Island	DATES & WORKFLOW
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	Getting Started				Please confirm to conti	inue.		
						CANCEL OK	Package	
						V DATES & WORKFLOW	1	

BR Marks Partial Transfer approved by DSF

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

Ê:	Project Finder		C0000804	162 - R075 Greenhouse, Playground, Flood Elim, Parapets,	ı	Joel Joesph SCA Sandbox	-		×
		÷	ALL PROJECTS	MY PROJECTS RECENT PROJECTS Q					
Ŀ	Project Finder	-0	🕈 SCA UAT	Hard Bid > Staten Island > District 31S SELECT					
			Number	Name					
	Apps		→ 0026	Danny Test		-	☆	0	
Q	Search		→ 0028	Danny Test2		2	☆	ľ	
			→ C000080462	R075 Greenhouse, Playground, Flood Elim, Parapets, Windows, Ext Mas.	. 1		☆	0	
Ê	Tasks								

9. Go to Apps> All Apps> Closeout

	Apps	C000080462 - R075 Greer	nhouse, Playground, Flood Elim, Parapets, 🧨 😍 Erby Keesha — 🗖 🗙
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Ŀ	Project Finder	All Apps	Recent
	Apps	Administration	U Getting Started
Q	Search	Cost Management	CI Closeout
		Document Management	Punch Lists
Ê	Tasks		LOG Dev Logs

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

CI C	loseout	C00	00080462 - R075 Gi	eenhouse, Playgrou	und, Flood Elim, Par	apets, d	× 8	Erby Keesha SCA Sandbox	– 🗆 ×
	<i>←</i>	Closeout I	tems Substantial	Completion Certificat	e Deficiencies	Punch List	Commis	sioning FMSI	Substantial/
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Ŀ	Project Finder	Q Defau	ılt ∽ C						÷
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0	Search	0001	Substantial Package	Pending CPO Review	Savetri Muneshwar - S	SCA Sandbox			
~	Search	0001	Partial Transfer	Sent to DSF					
Ê	Tasks			2					

4. Click DSF Approved

			✓ DETAILS		COMME	ITS
U Getting Started			Number 0001 Type Special Transfer ~ DATES & WORKFLOW Workflow Status Sent to DSF		REFEREN	CE
		2 Item(s)	Assigned To		,	
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