



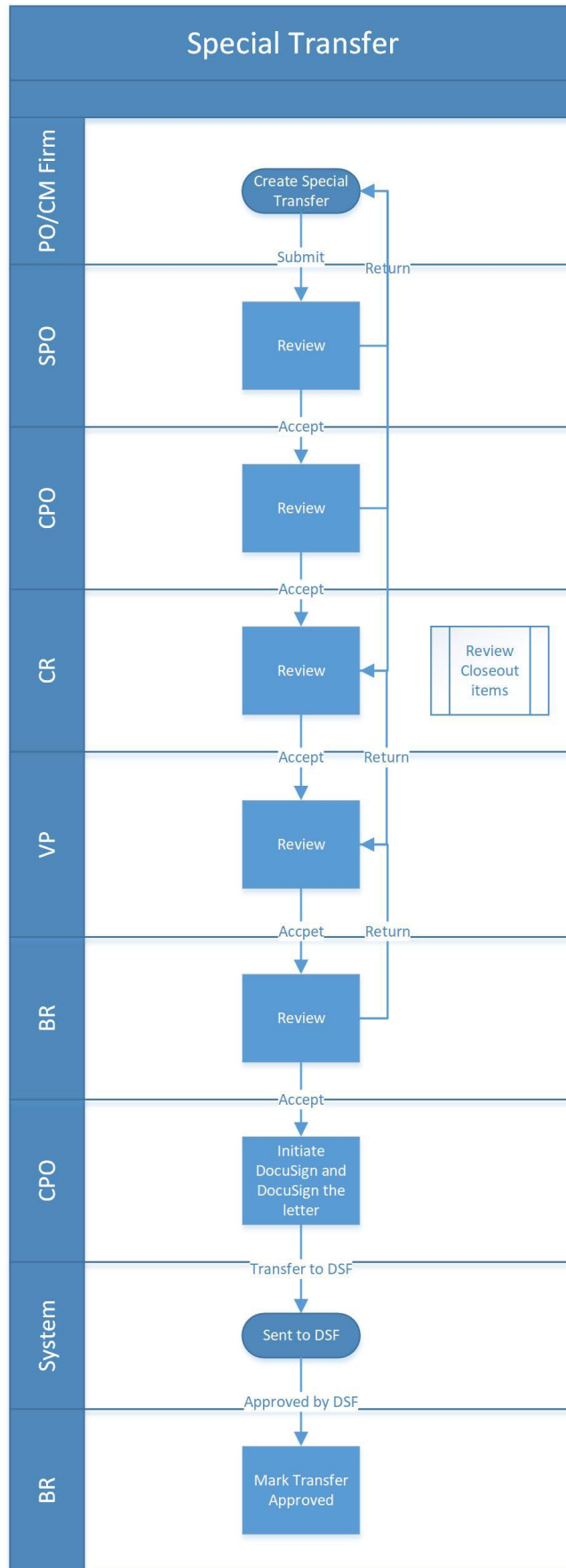
Special Transfer Training Guide

Date Created: 3/21/2023

Table of Contents

Workflow	3
Step-by-Step Instructions	4
PO/CM Firm Creates Special Transfer.....	4
Edit Special Transfer	6
SPO Accepts or Returns Special Transfer	7
CPO Accepts or Returns Special Transfer	8
CU Gatekeeper Assigns Closeout Reviewer (CR)	9
CR Accepts or Returns Special Transfer	10
VP Accepts or Returns Special Transfer	12
BR (Borough Reviewer) Accepts or Returns Special Transfer	13
CPO Initiates DocuSign	14
CPO DocuSigns Notice Letters and Transfers to DSF.....	15
BR Marks Special Transfer approved by DSF.....	16

Workflow

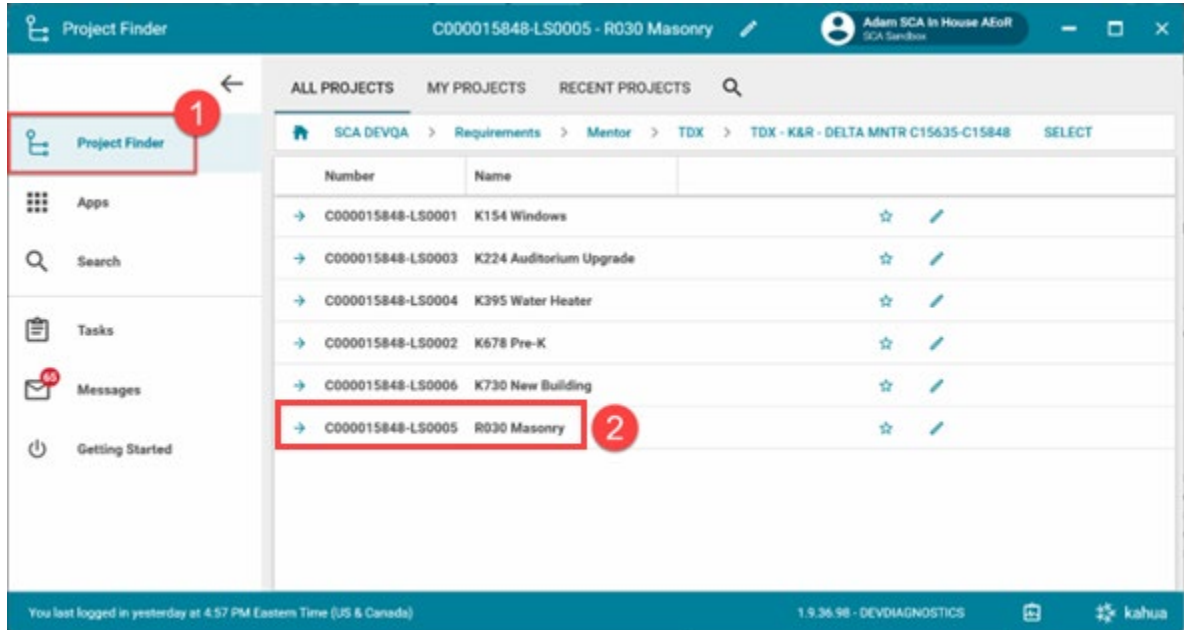


Step-by-Step Instructions

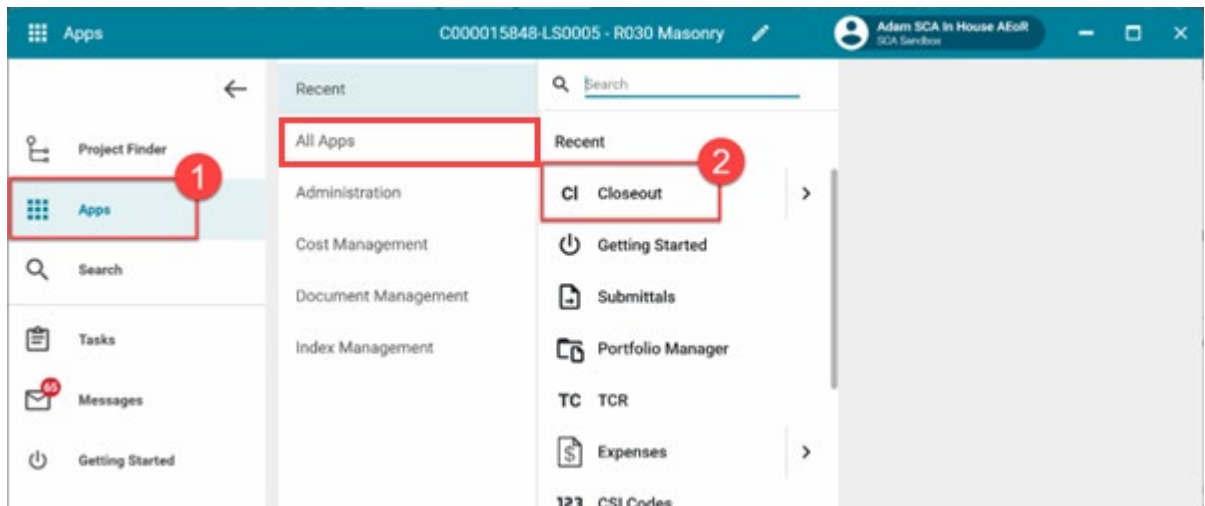
PO/CM Firm Creates Special Transfer

Closeout items have been generated. No Full Transfer was created. All Partial Transfers completed.

1. Go to Project Finder > Select the desired project



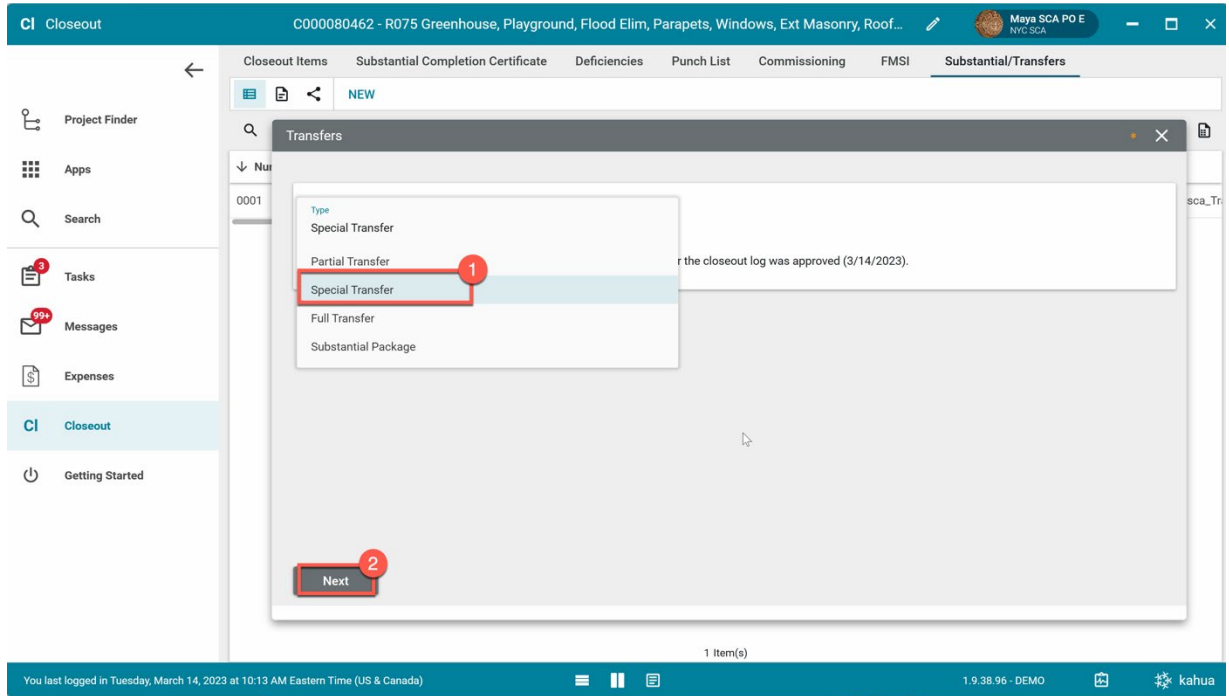
2. Go to **Apps** > **All Apps**> Select the **Closeout** App



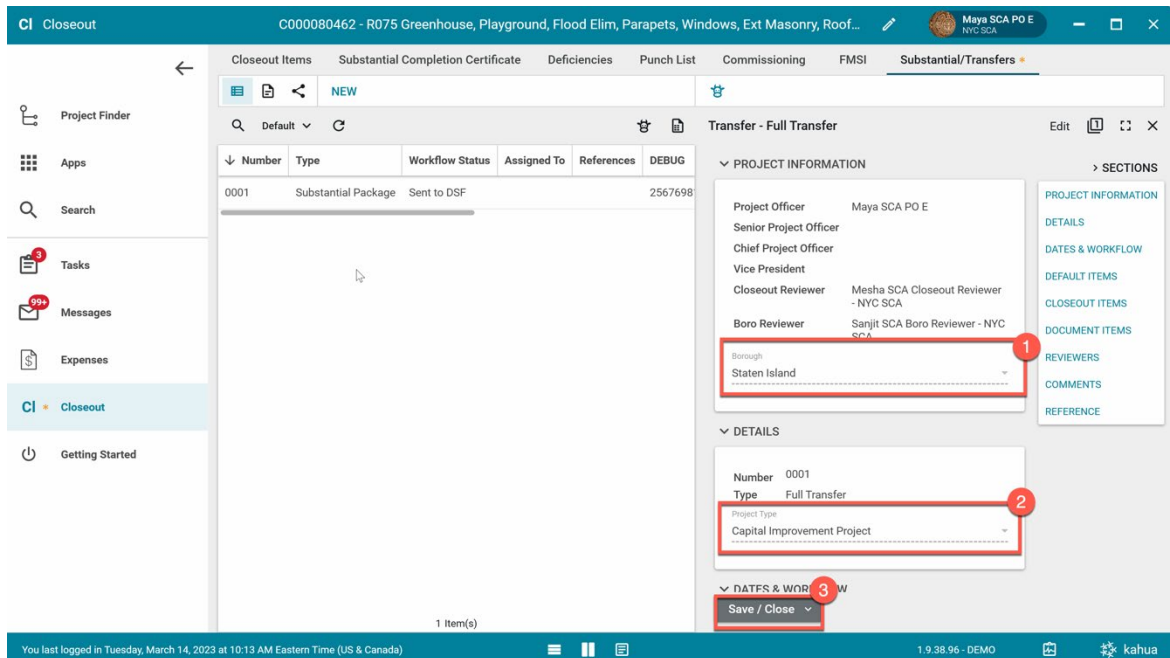
3. Click the **Substantial/Transfers** tab> Click **New**



4. Select **Special Transfer** then 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)

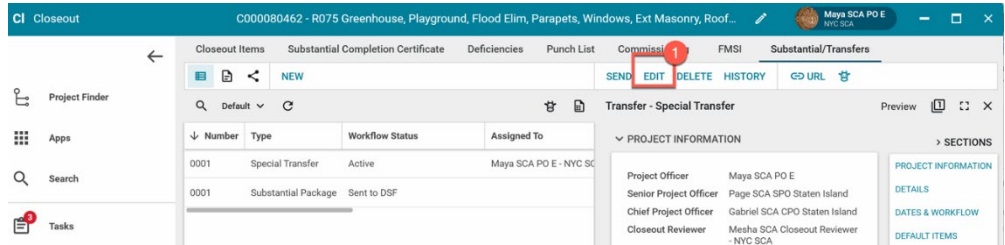


7. Click **Save/Close** to save a **Draft**. *You have not submitted the transfer at this point.*

Edit Special 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**

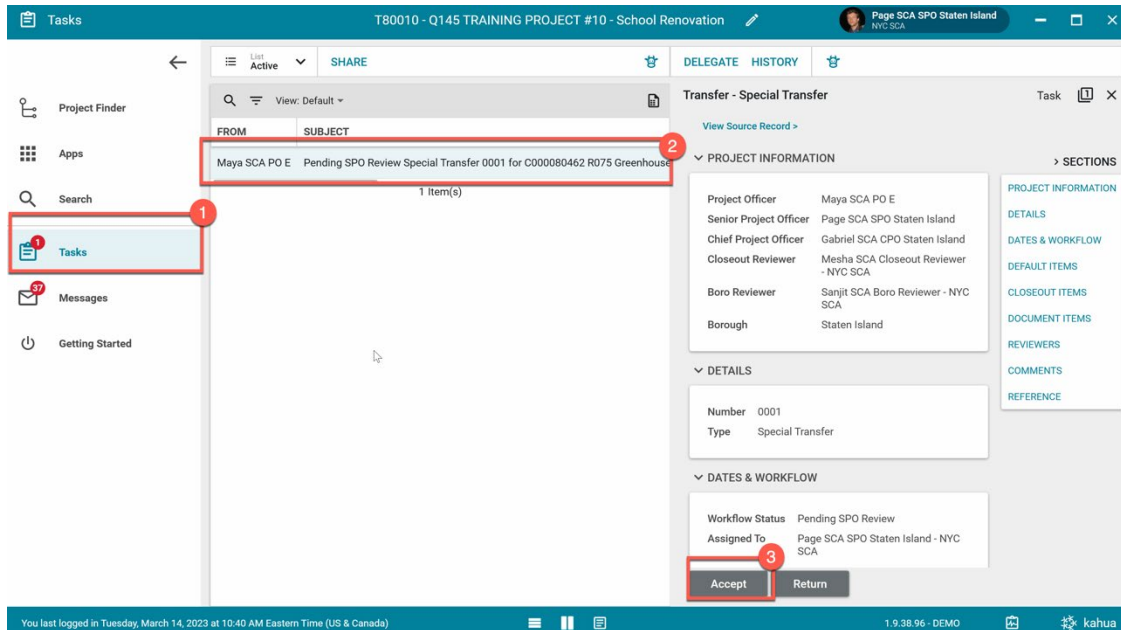


8. Click **Submit**

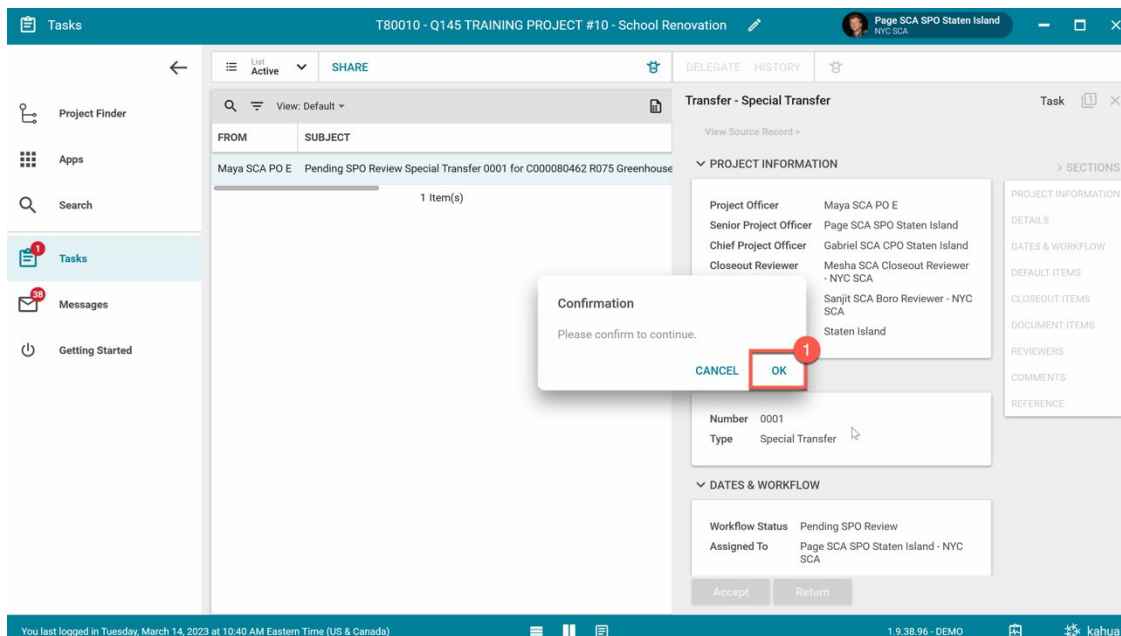


SPO Accepts or Returns Special Transfer

1. Go to **Tasks** and select the **Pending SPO Review Special Transfer** task
Option 1: Click **Accept** to confirm the special transfer.
Option 2: Click **Return** to send it back to the PO (you will need to provide a reason).

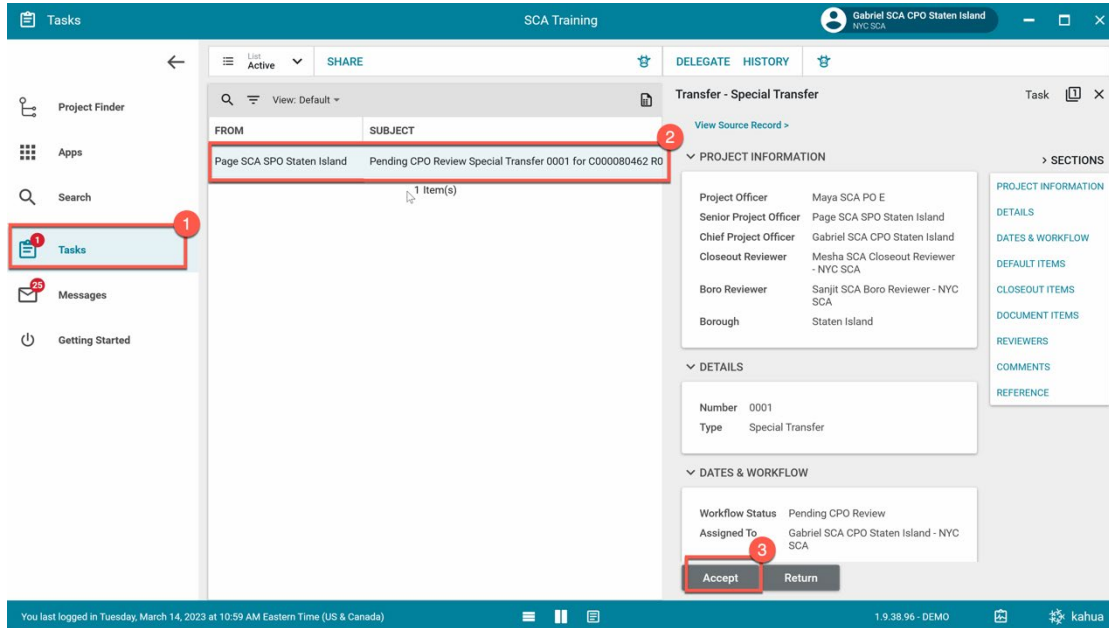


2. Click **OK** to confirm the transfer

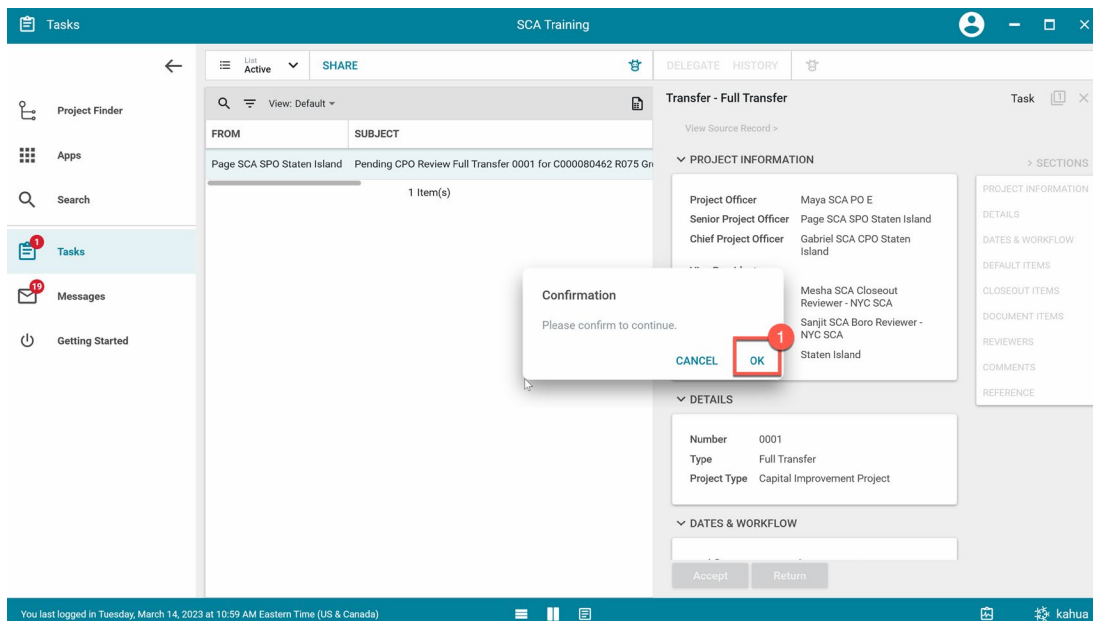


CPO Accepts or Returns Special Transfer

1. Go to **Tasks** and select the **Pending CPO Review Special Transfer** task
Option 1: Click **Accept** to confirm the special transfer.
Option 2: Click **Return** to send it back to the PO (you will need to provide a reason).

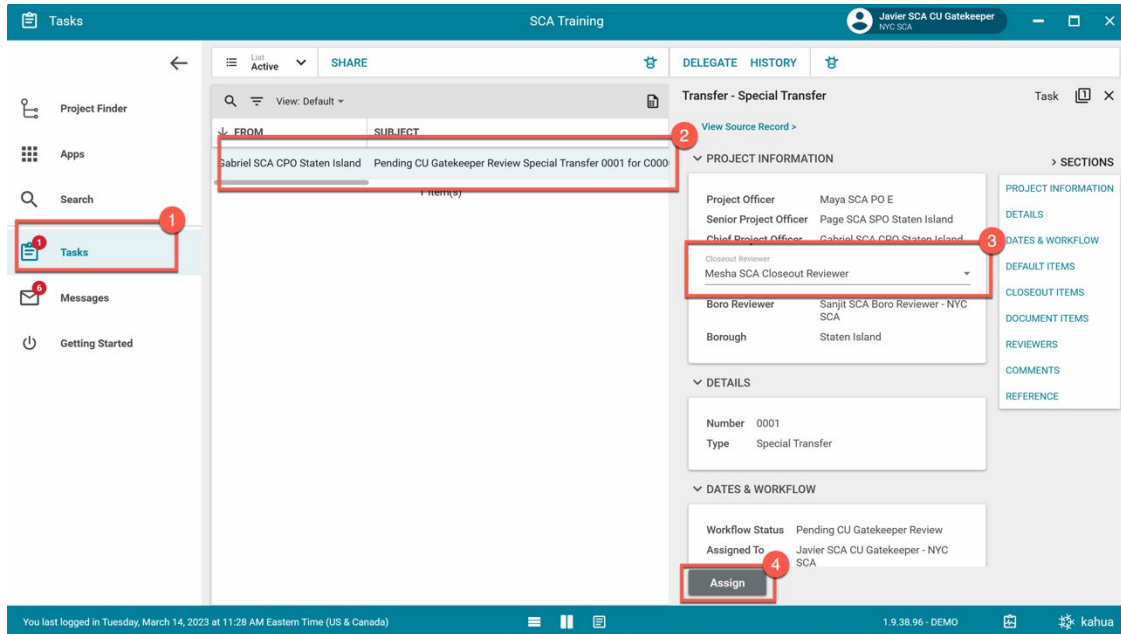


2. Click **OK** to confirm the transfer

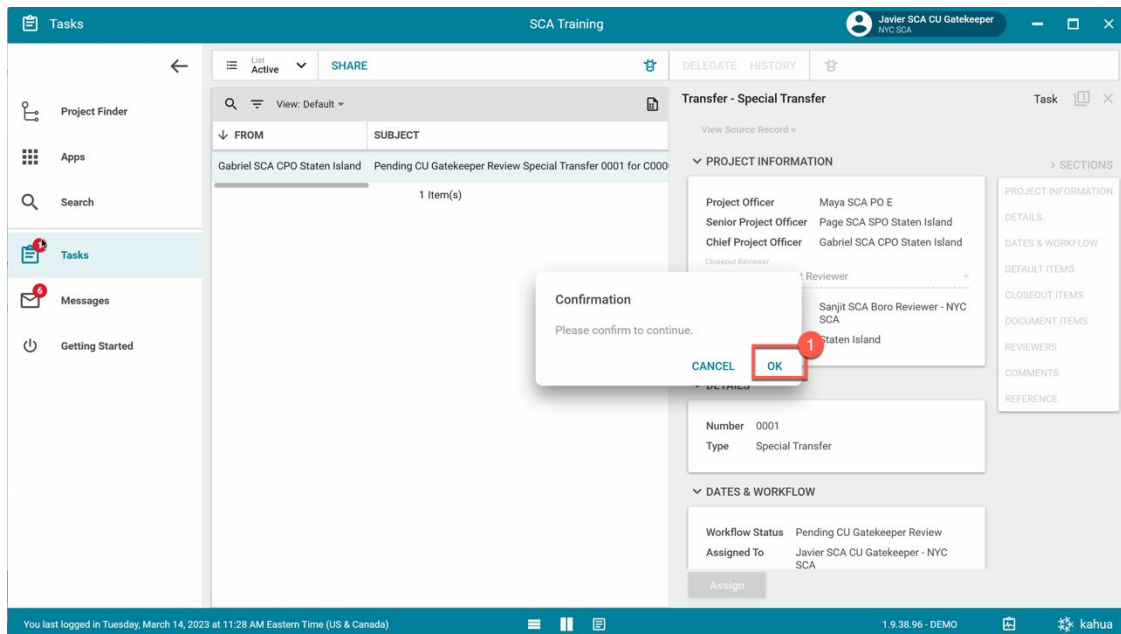


CU Gatekeeper Assigns Closeout Reviewer (CR)

1. Go to **Tasks** and select the **Closeout Review** task
2. Under **Project Information**, select a **CR** from the drop down menu
3. Click **Assign**

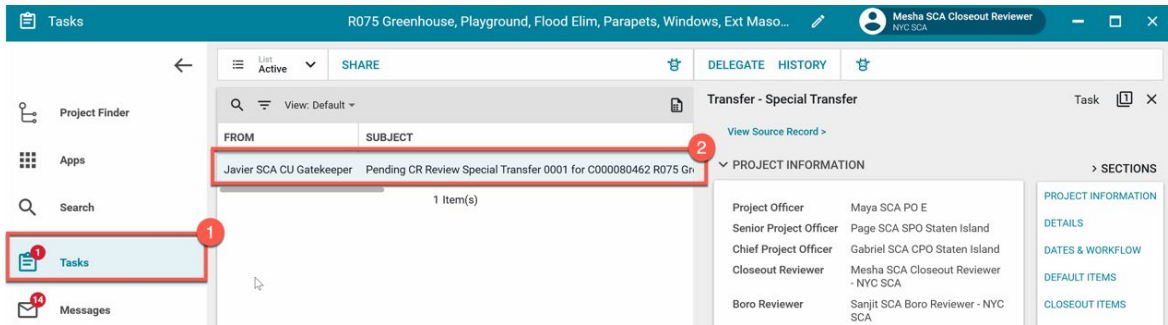


4. Click **OK** to confirm

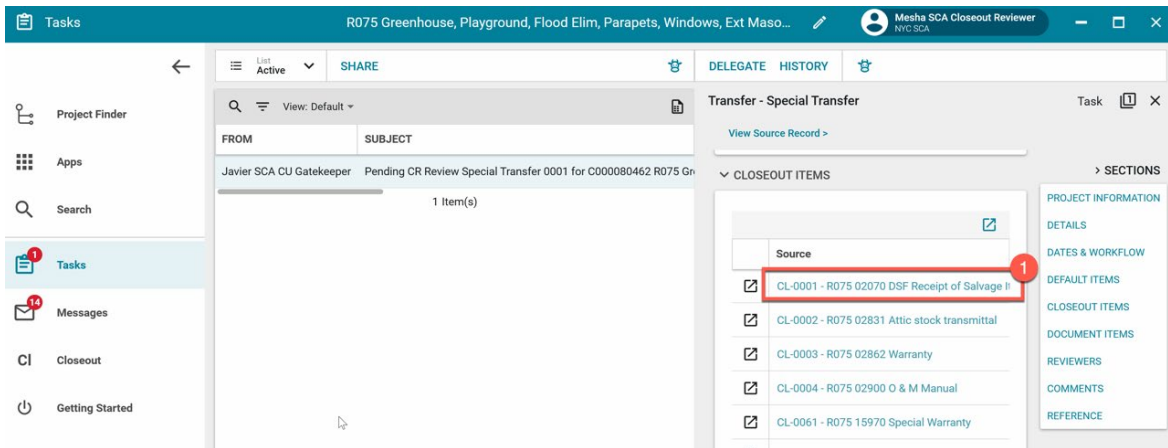


CR Accepts or Returns Special Transfer

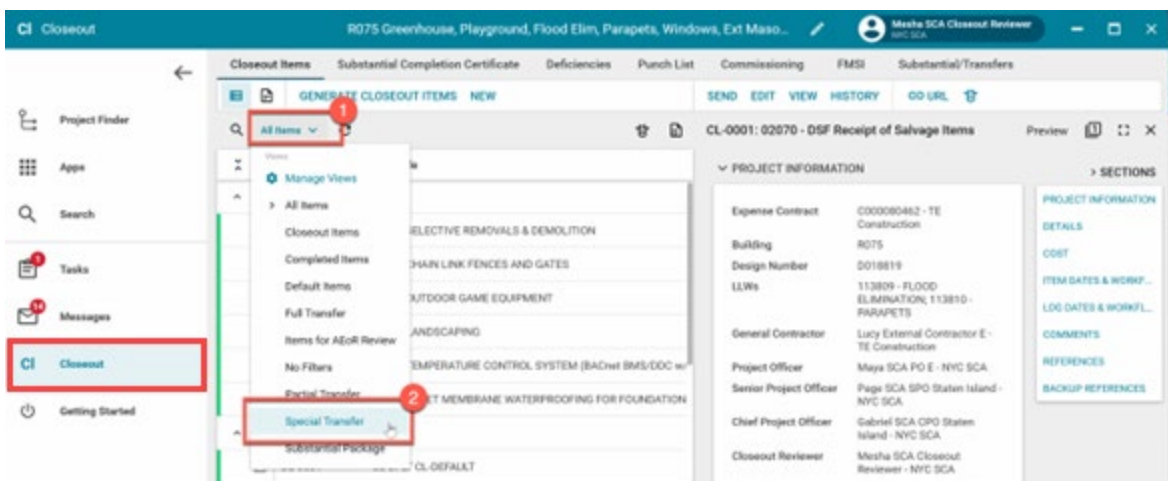
1. Go to **Tasks** and select the **Special Transfer** task



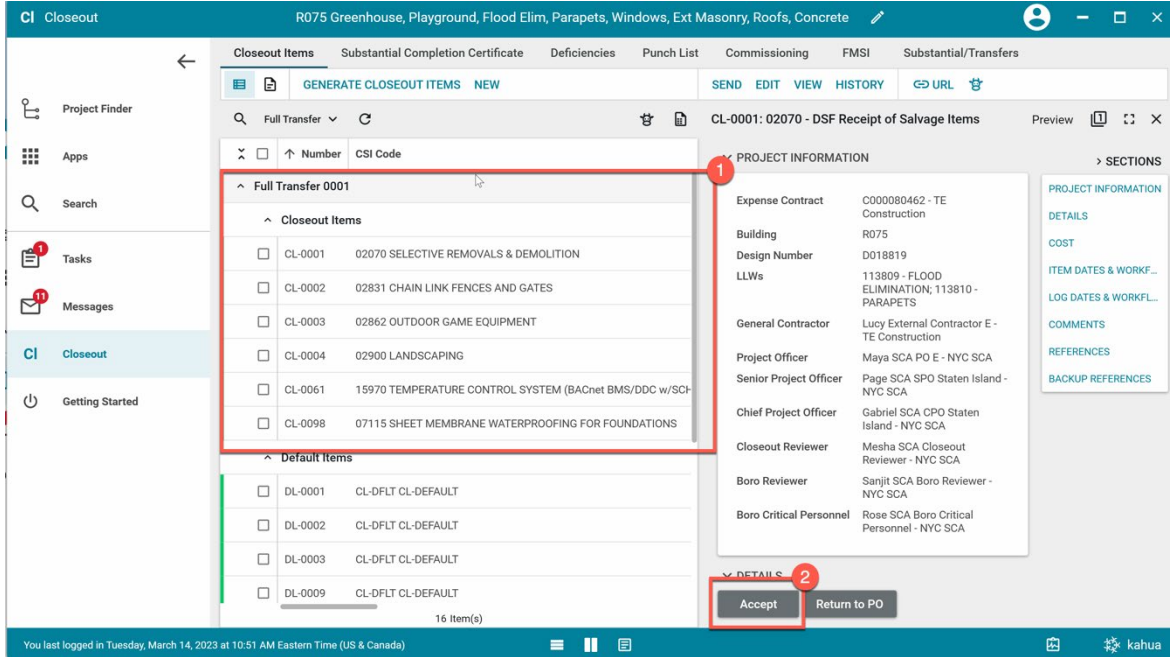
2. **Closeout Items** section: Click any of the **blue links** to open the **Closeout App**



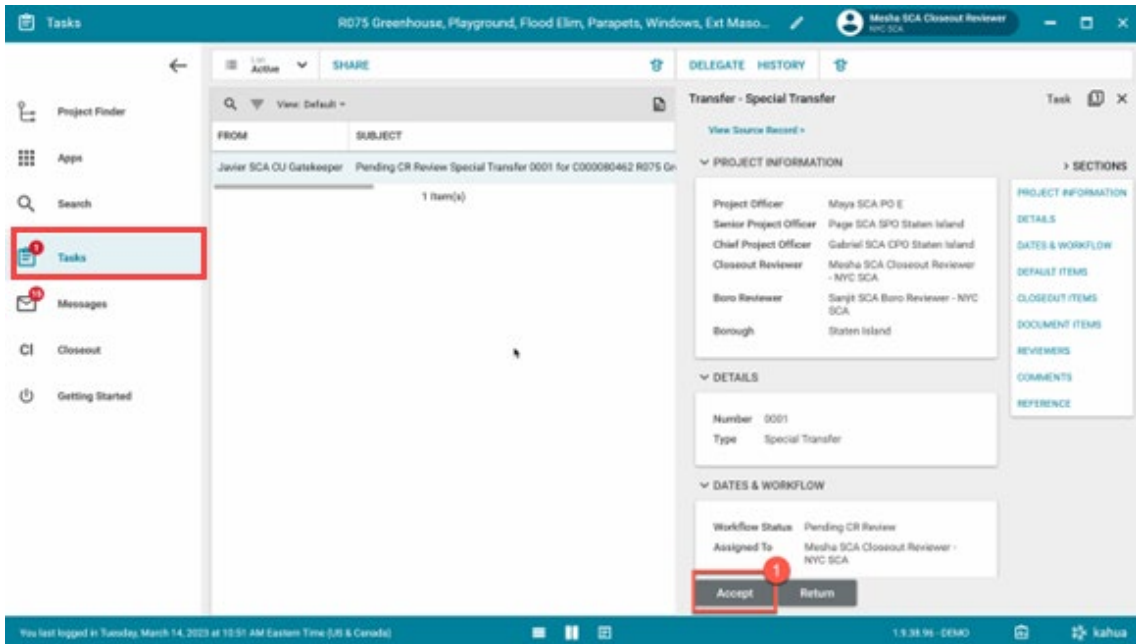
3. Click the **All Items** menu > Select **Special Transfer** to view only special transfers closeout items.



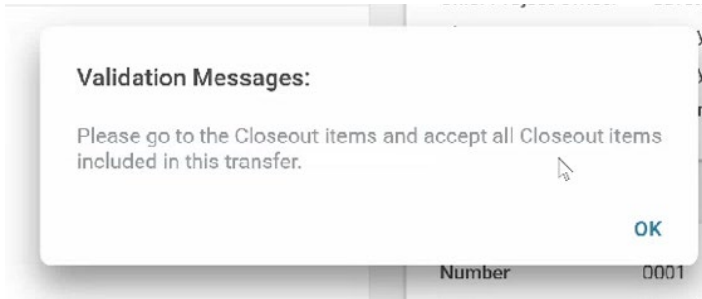
4. **Accept or Return to PO** EACH of the closeouts items starting with CL-XXXX



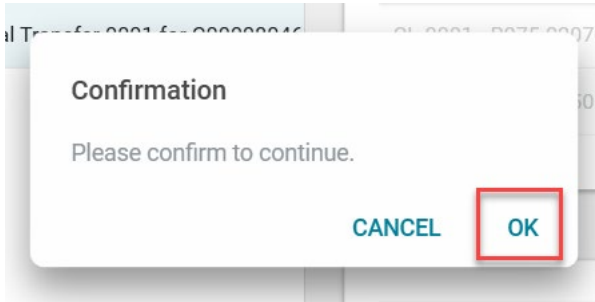
5. After every closeout item inside this transfer is accepted, go back to the Task, and click **Accept**



NOTE: 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.

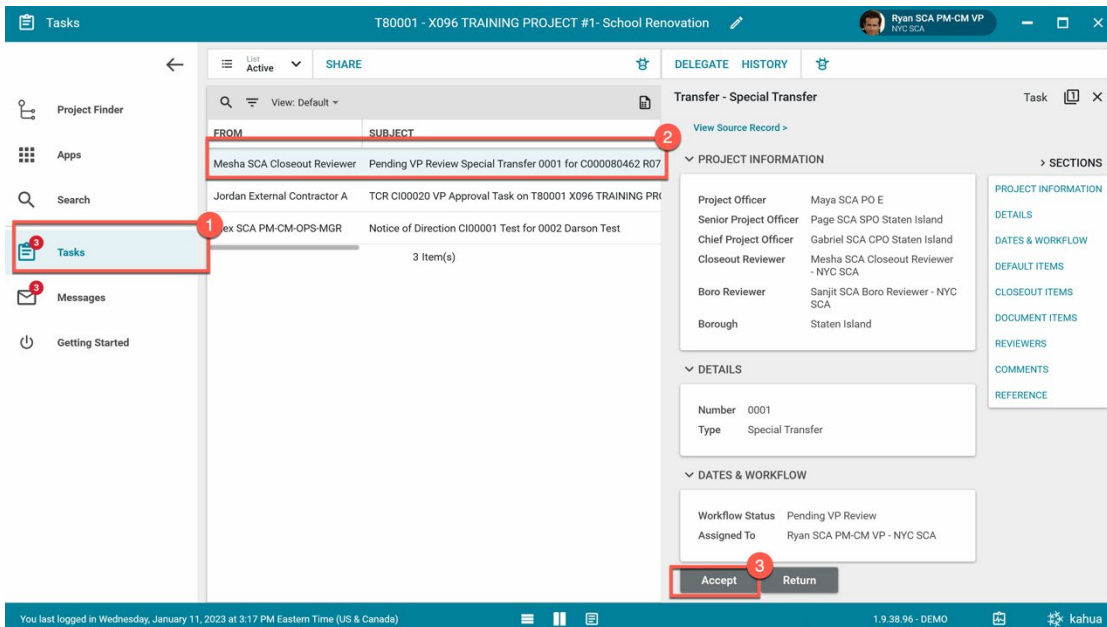


6. Click **OK** to confirm the transfer.



VP Accepts or Returns Special Transfer

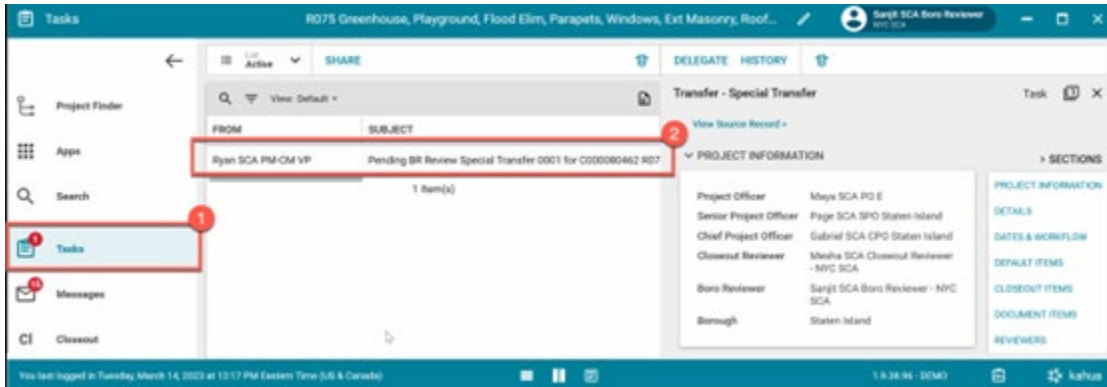
1. Go to **Tasks** and select the **Special Transfer** task
Option 1: Click **Accept** to confirm the special transfer.
Option 2: Click **Return** (you will need to provide a reason).



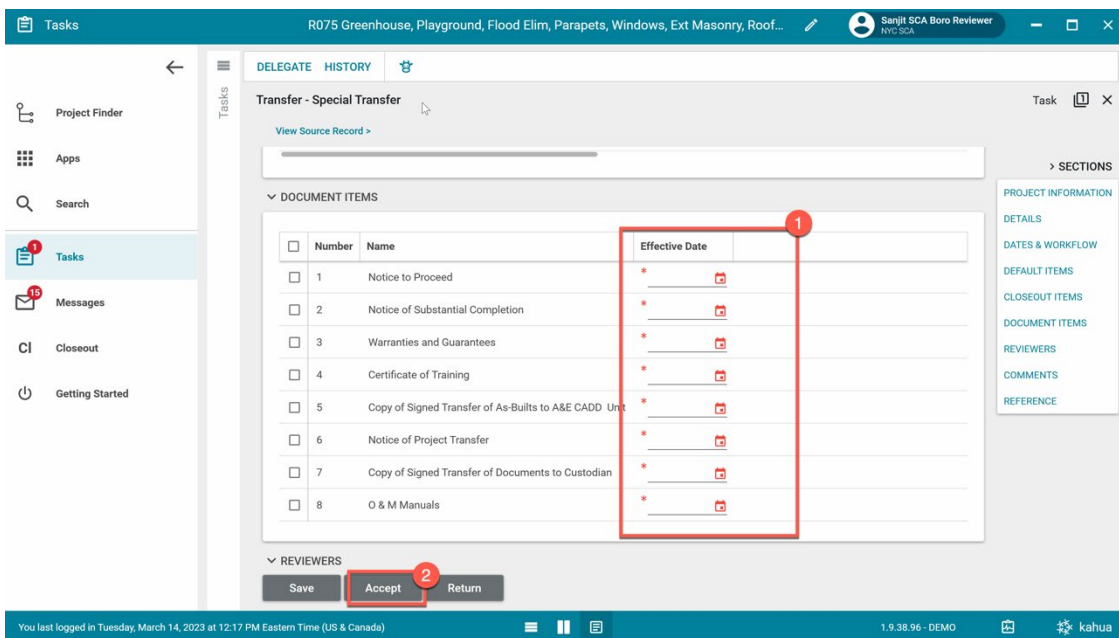
2. Click **OK** for confirmation to accept the transfer.

BR (Borough Reviewer) Accepts or Returns Special Transfer

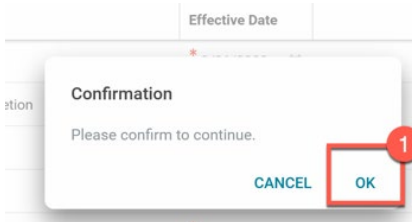
1. Go to **Tasks** and select the **Special Transfer** task



2. **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)



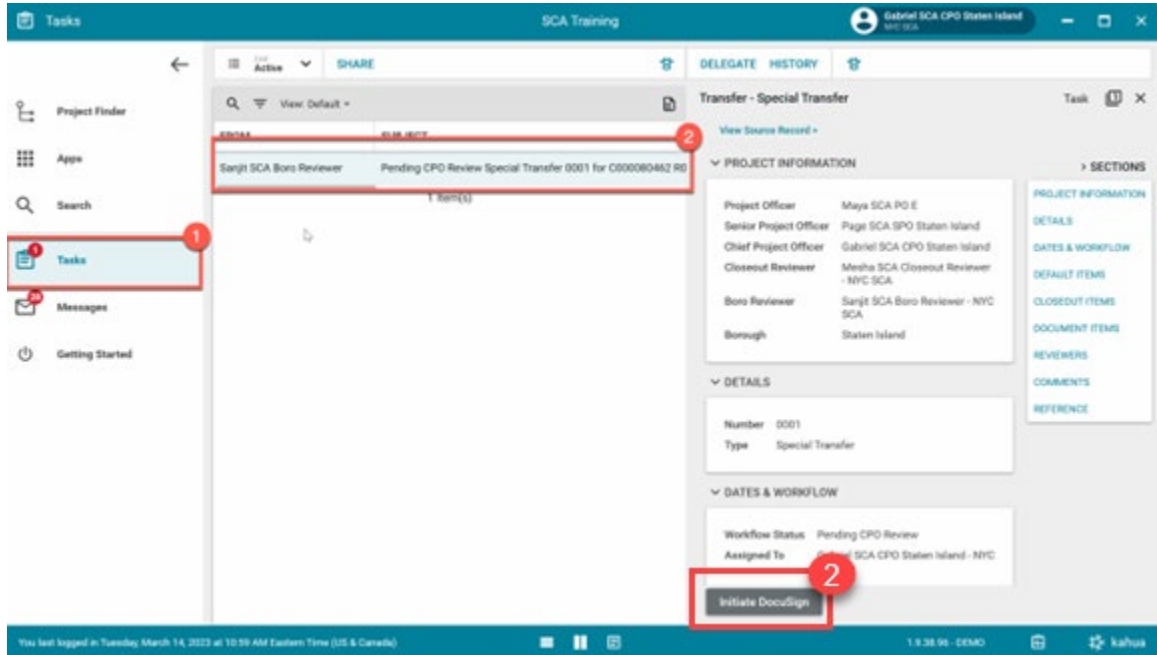
4. Click OK to confirm the transfer



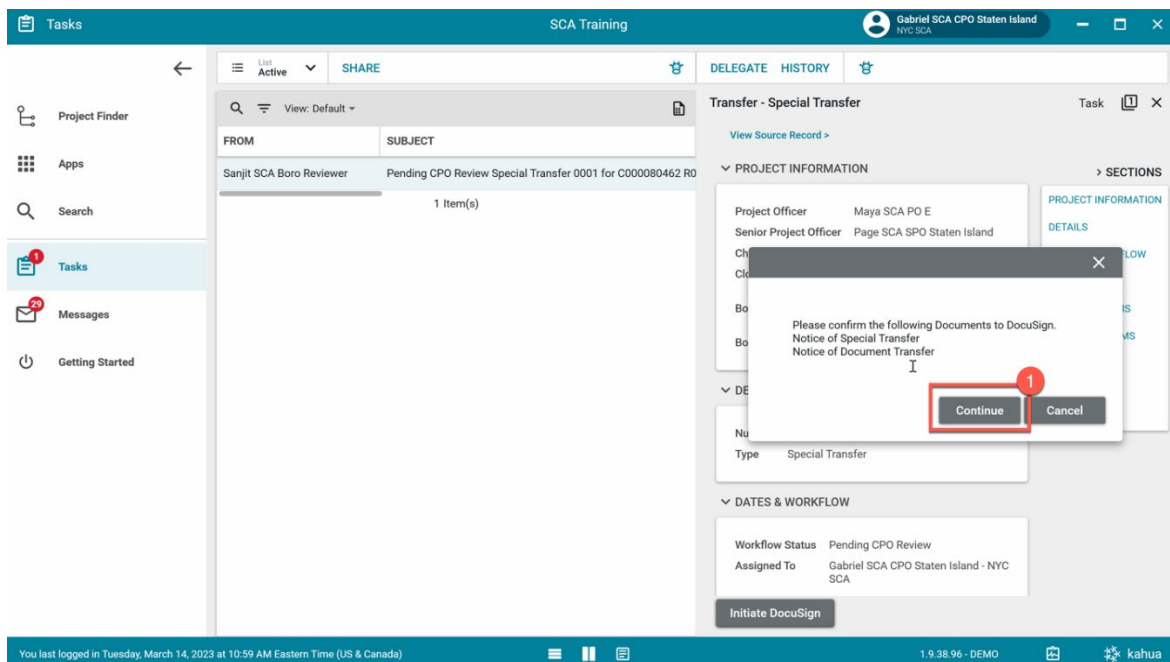
CPO Initiates DocuSign

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 **Special Transfer** task
2. Click Initiate DocuSign to start the eSignature process



3. Click **Continue** to confirm

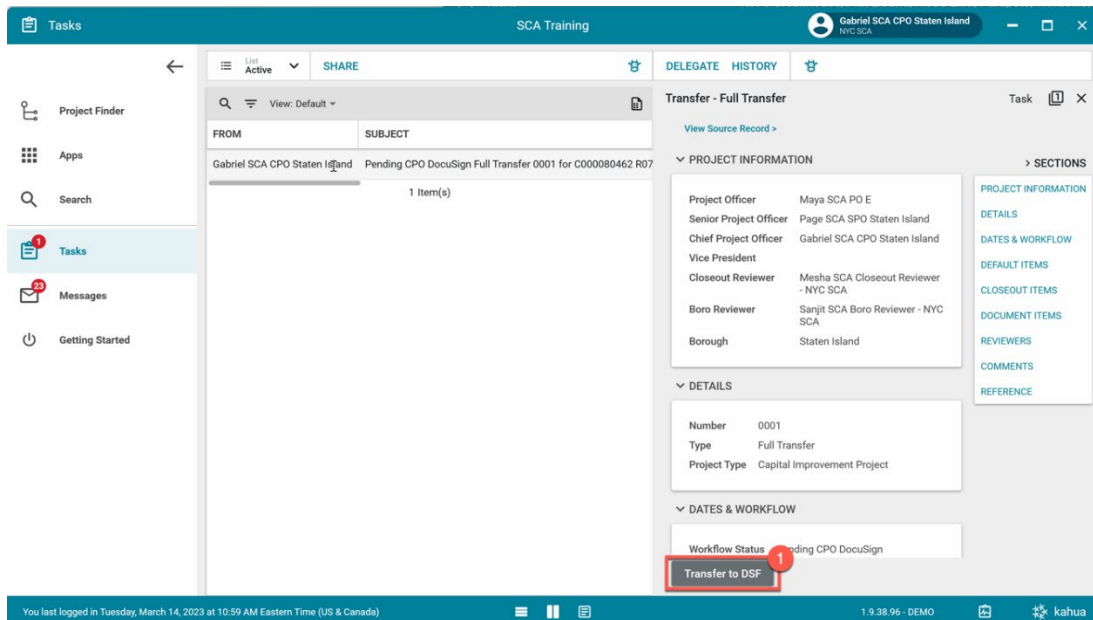


CPO DocuSigns Notice Letters and Transfers to DSF

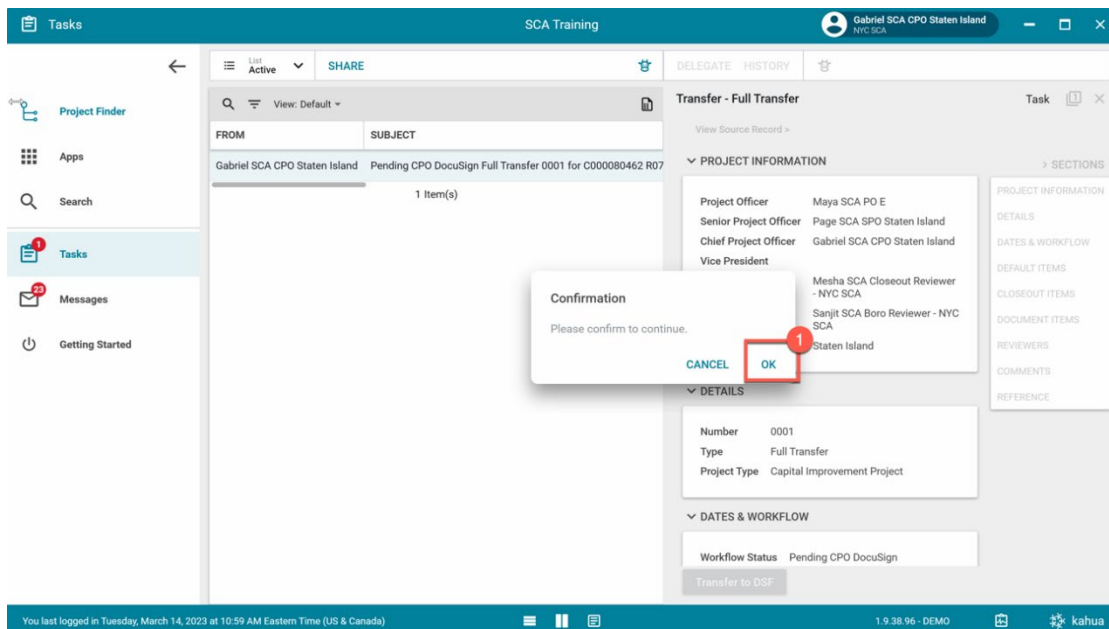
1. Go to email account (external) > Select email titled **Partial Transfer**
2. Click Review Document in email
3. You are redirected to DocuSign. Click [here](#) to learn more about DocuSign.

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

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

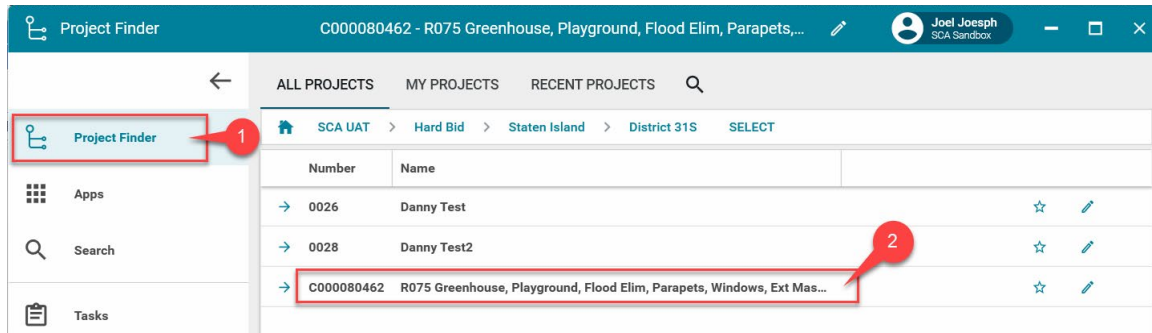


5. Click Ok to confirm

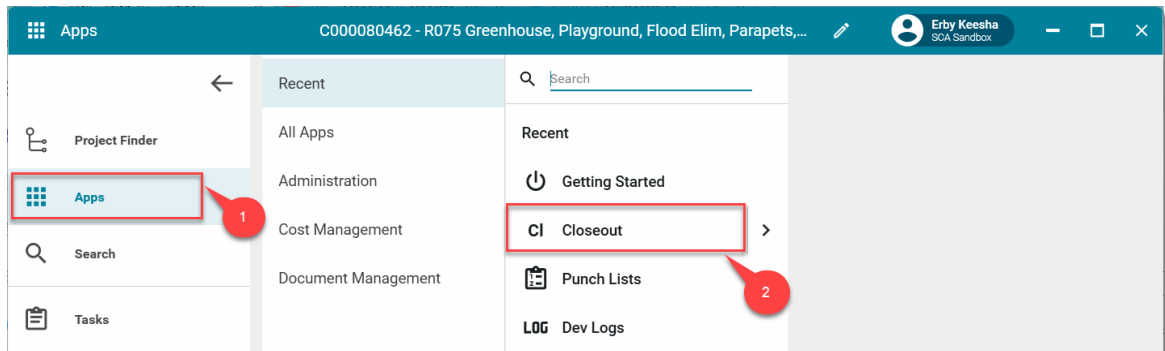


BR Marks Special Transfer approved by DSF

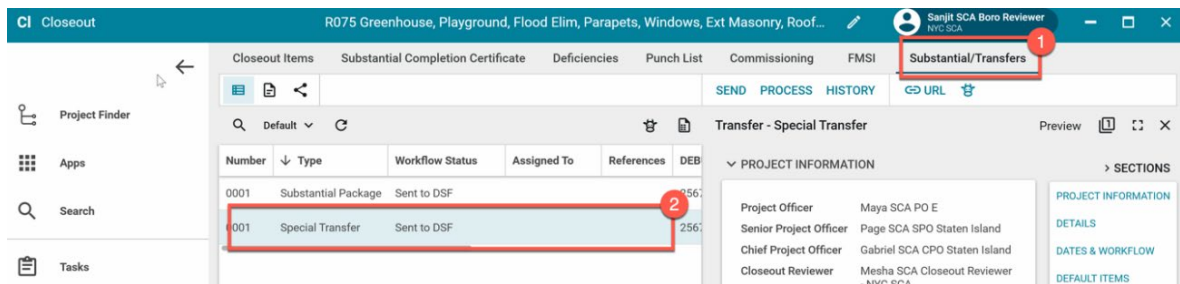
1. Go to Project Finder > Navigate to the desired project



2. Go to Apps > All Apps > Closeout



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



4. Click **DSF Approved**

