



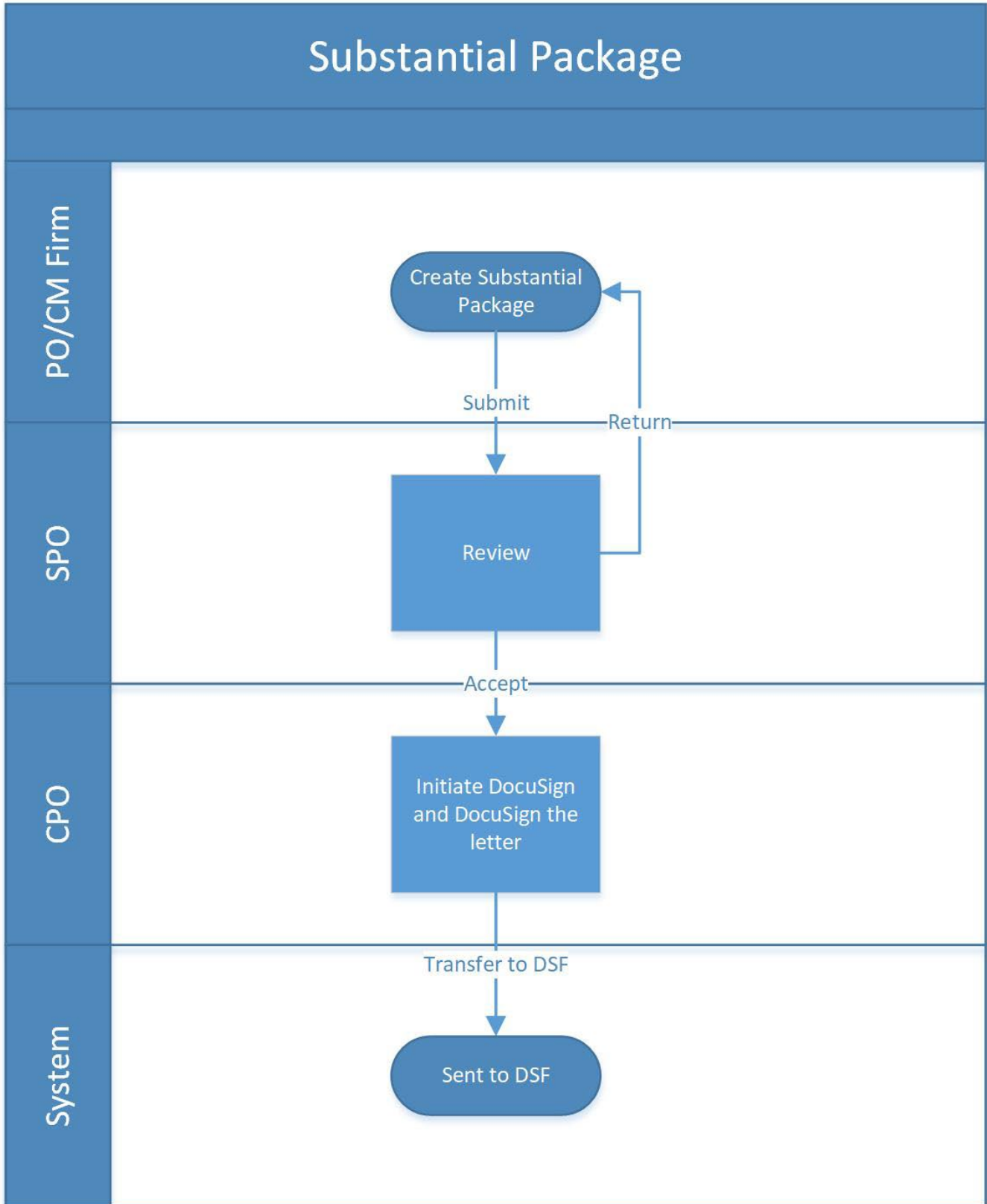
Substantial Package Training Guide

Date Created: 3/17/2023

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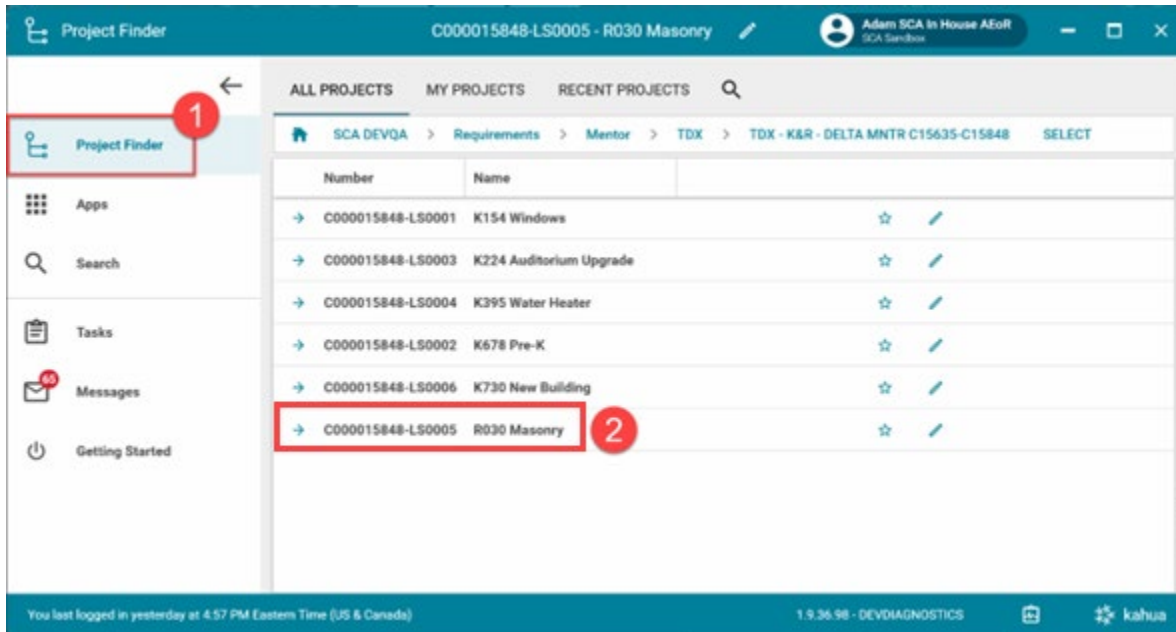


Step-by-Step Instructions

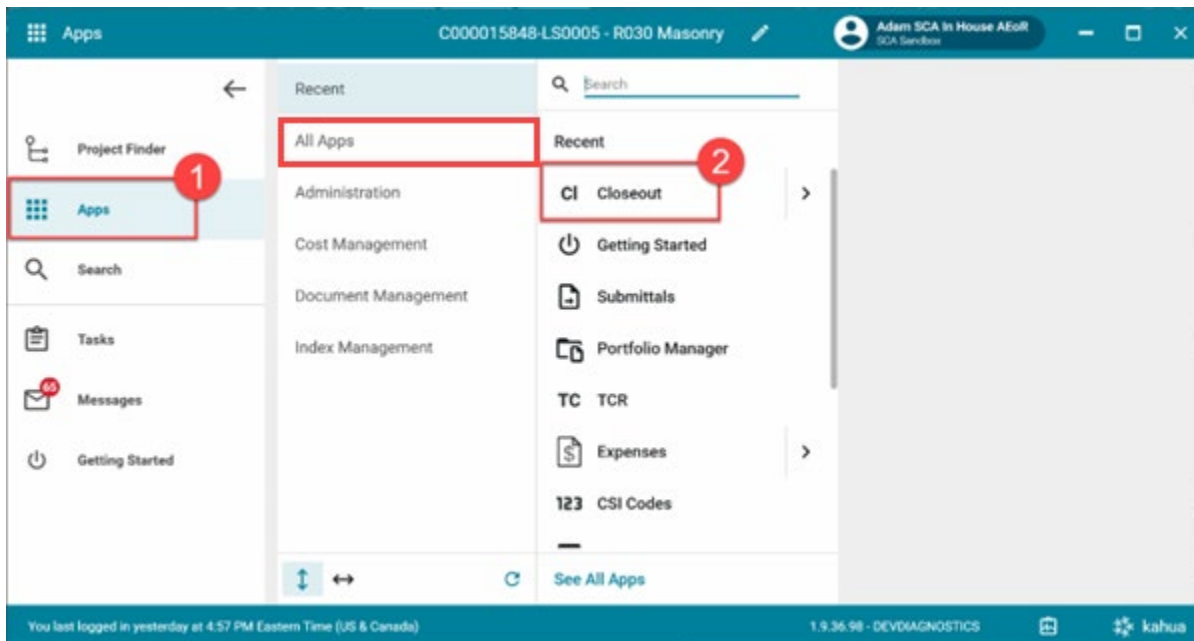
PO/CM Firm Creates Substantial Package

The Substantial Completion Certificate was created. Default Items were generated. **Deficiency List was completed.**

1. Go to Project Finder > Select the desired project



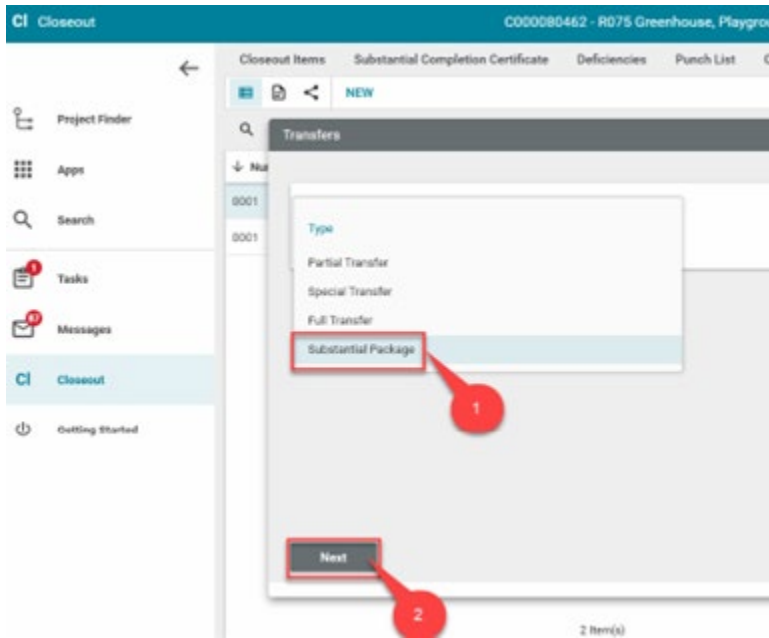
2. Go to Apps > All Apps> Select the **Closeout** App



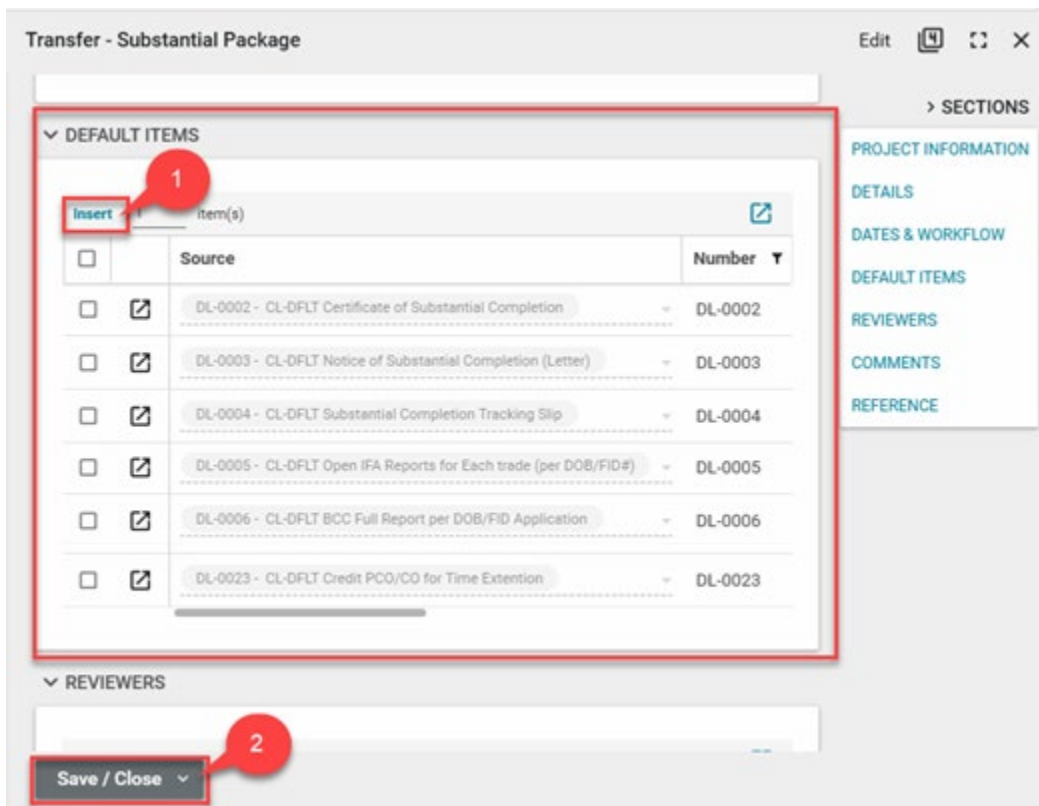
3. Click the **Substantial/Transfers** tab> Click **New**



4. Click **Substantial Package**
5. Click **Next** at the bottom of the window.



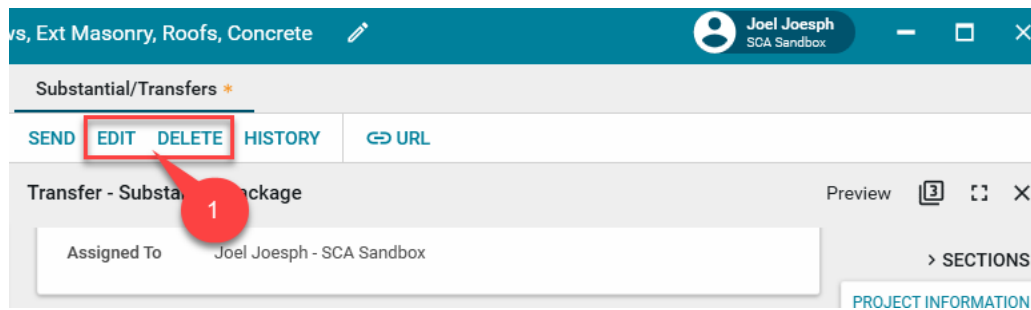
6. Scroll down to **Default Items**. Click **Insert** to add line items.
7. Click **Save/Close**.



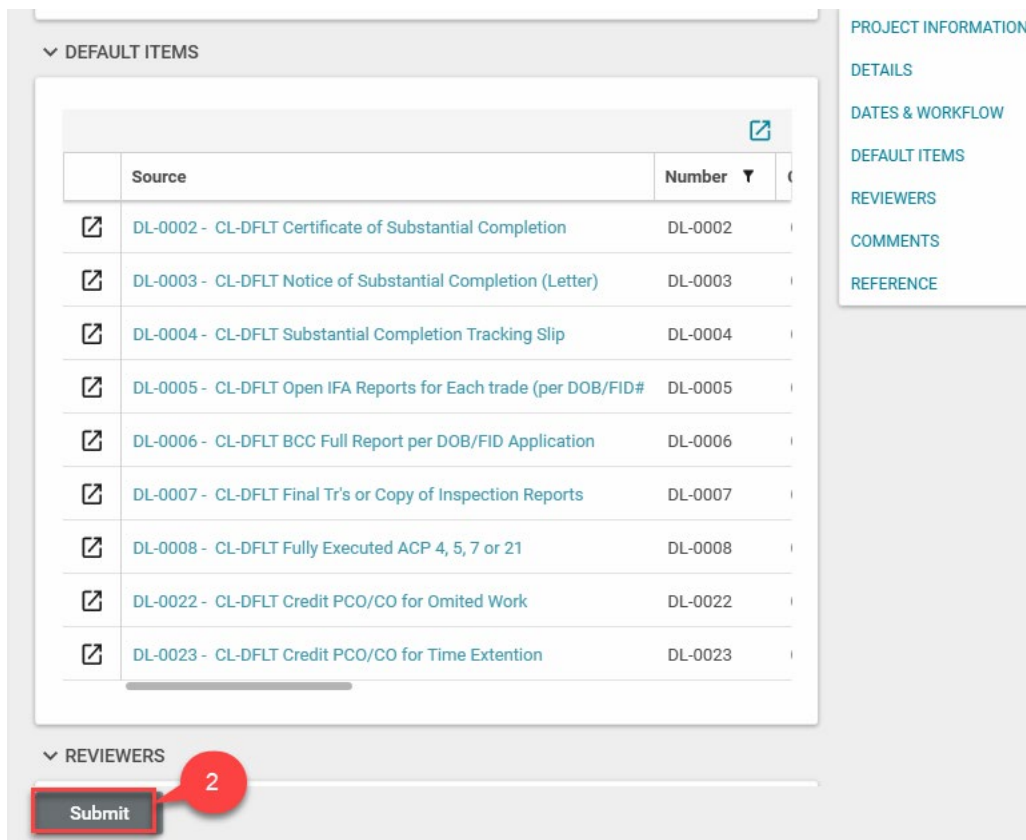
Edit/Delete Substantial Package

PO can make changes before submitting or delete the Substantial Package.

1. Click **Edit**> make your changes, then click **Save/Close** when finished. Or click **Delete**.

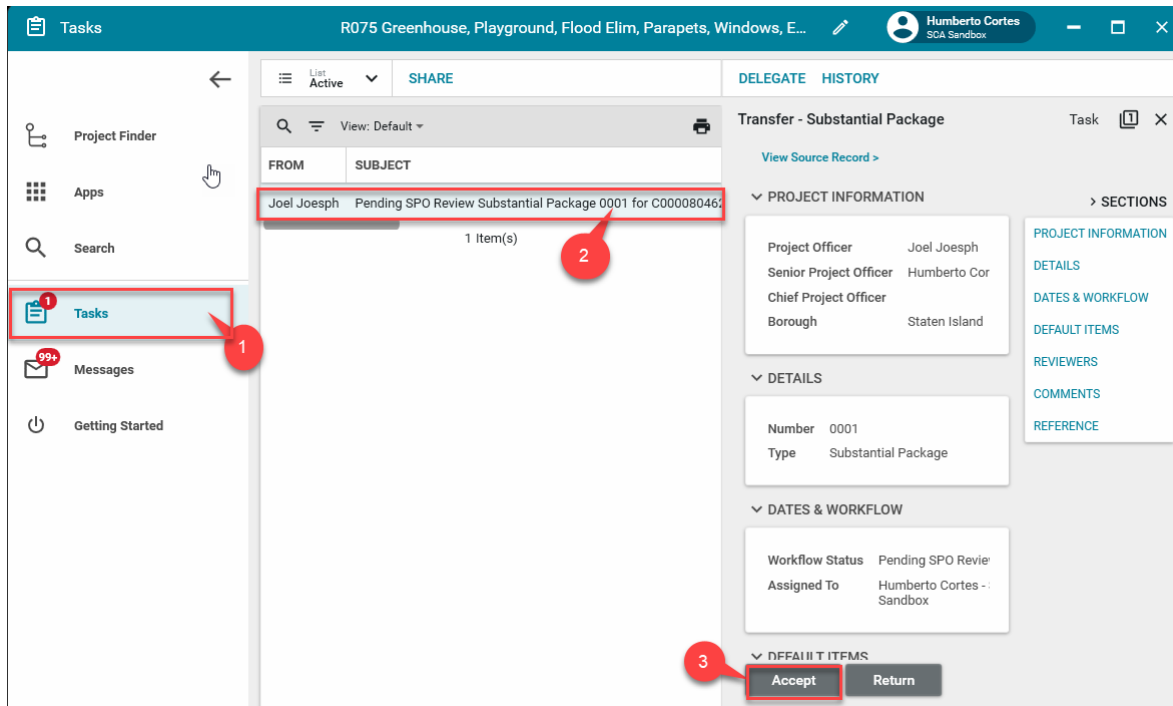


8. Click **Submit**. The package will go to the SPO for review.

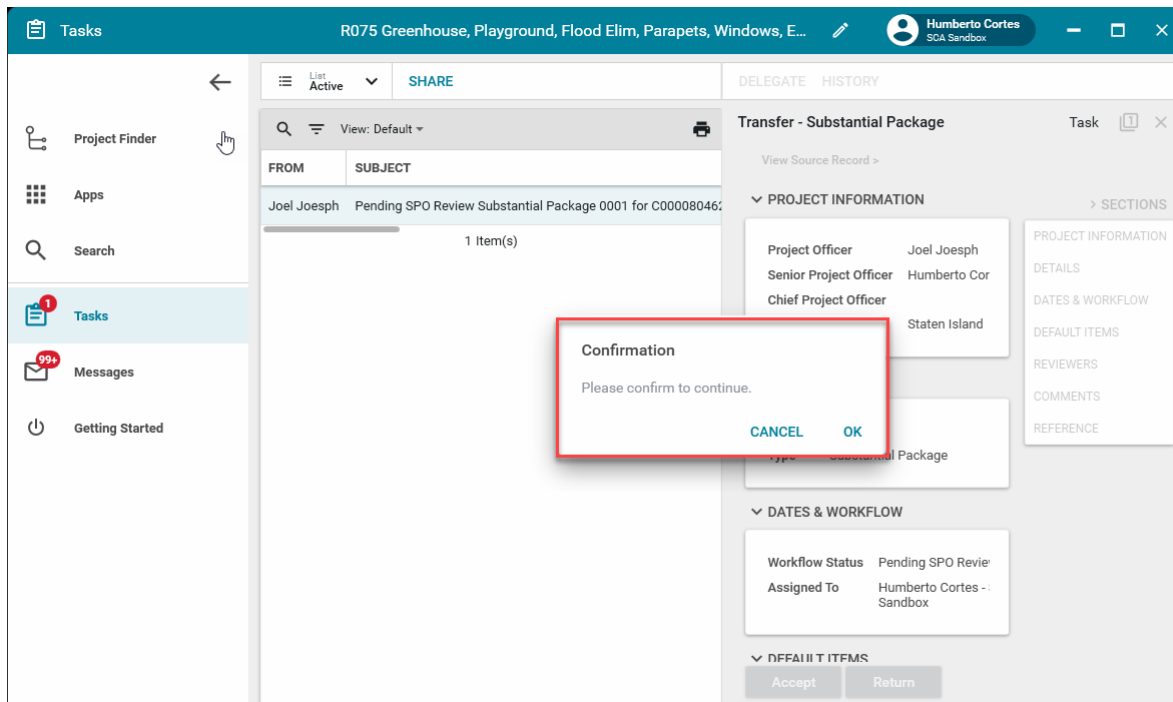


SPO Reviews Substantial Package

1. Go to **Tasks** and select the task
2. Click **Accept** or **Return** (back to the PO). If you click Return, you must provide a reason.



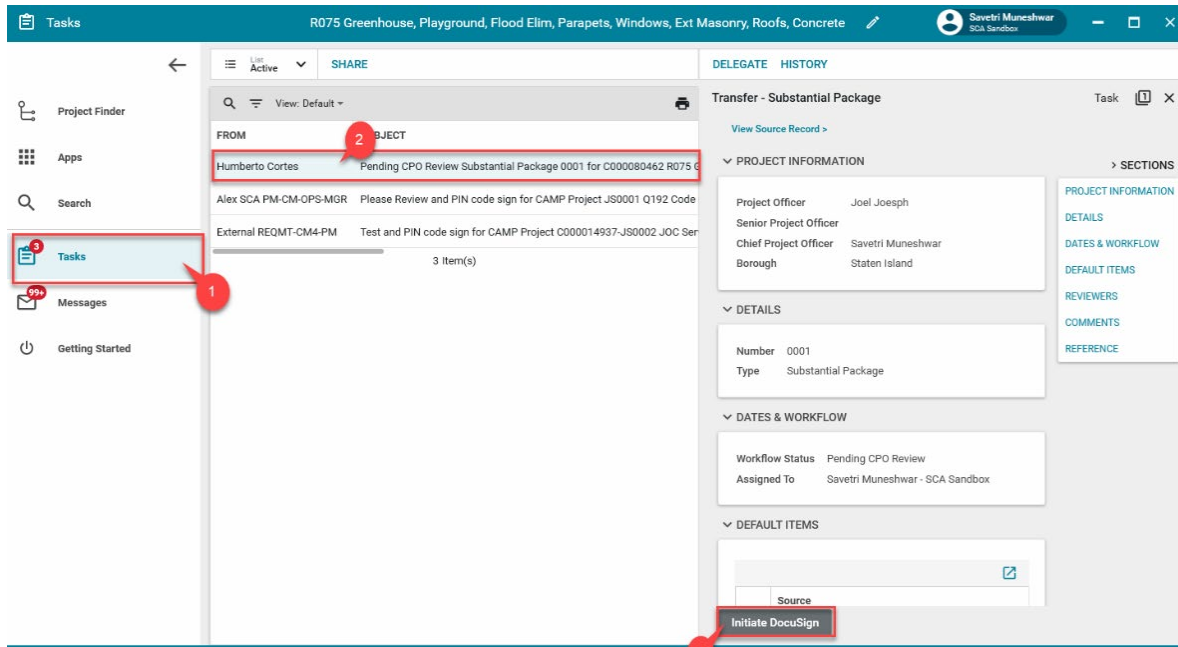
3. Click **OK** to confirm



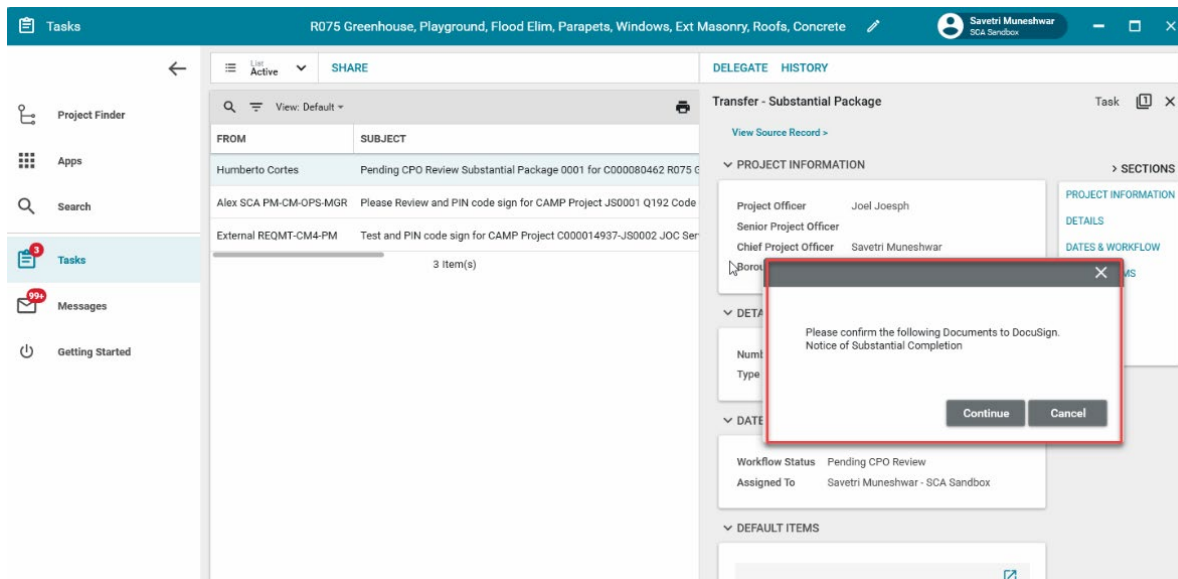
CPO Initiates DocuSign for Substantial Package

SPO has accepted substantial package. The certificate workflow is complete. The Notice letters are sent to the CPO for DocuSign approval.

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



3. Click **Continue**.



CPO DocuSigns Notice Letters

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 **Transfer to DSF**

The screenshot displays the Kahua user interface. On the left sidebar, the 'Tasks' menu item is highlighted with a red box and a red callout '1'. The main content area shows a list of tasks with columns for 'FROM' and 'SUBJECT'. The first task is highlighted with a red box and a red callout '2'. The task details on the right include 'PROJECT INFORMATION', 'DETAILS', 'DATES & WORKFLOW', and 'DEFAULT ITEMS'. A red callout '3' points to the 'Transfer to DSF' button located at the bottom of the task details panel.

FROM	SUBJECT
Savetri Muneshwar	Pending CPO DocuSign Substantial Package 0001 for C000080462 R07
Alex SCA PM-CM-OPS-MGT	base Review and PIN code sign for CAMP Project JS0001 Q192 Code
External REQMT-CM4-PM	Test and PIN code sign for CAMP Project C000014937-JS0002 JOC Ser

3 Item(s)

Transfer - Substantial Package

View Source Record >

PROJECT INFORMATION

Project Officer: Joel Joesph
Senior Project Officer: Savetri Muneshwar
Chief Project Officer: Savetri Muneshwar
Borough: Staten Island

DETAILS

Number: 0001
Type: Substantial Package

DATES & WORKFLOW

Workflow Status: Pending CPO DocuSign
Assigned To: Savetri Muneshwar - SCA Sandbox

DEFAULT ITEMS

Source: [Link]

Transfer to DSF