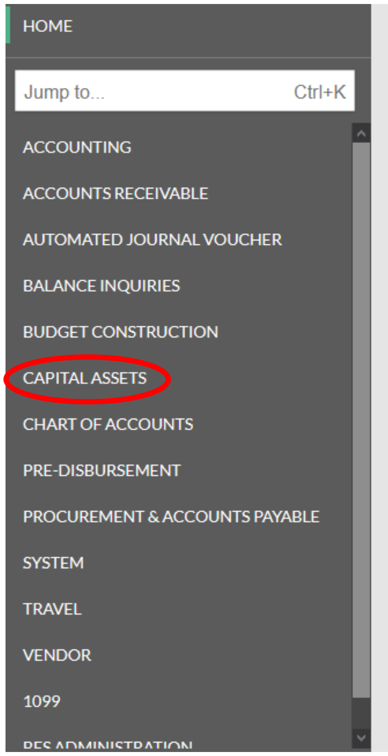
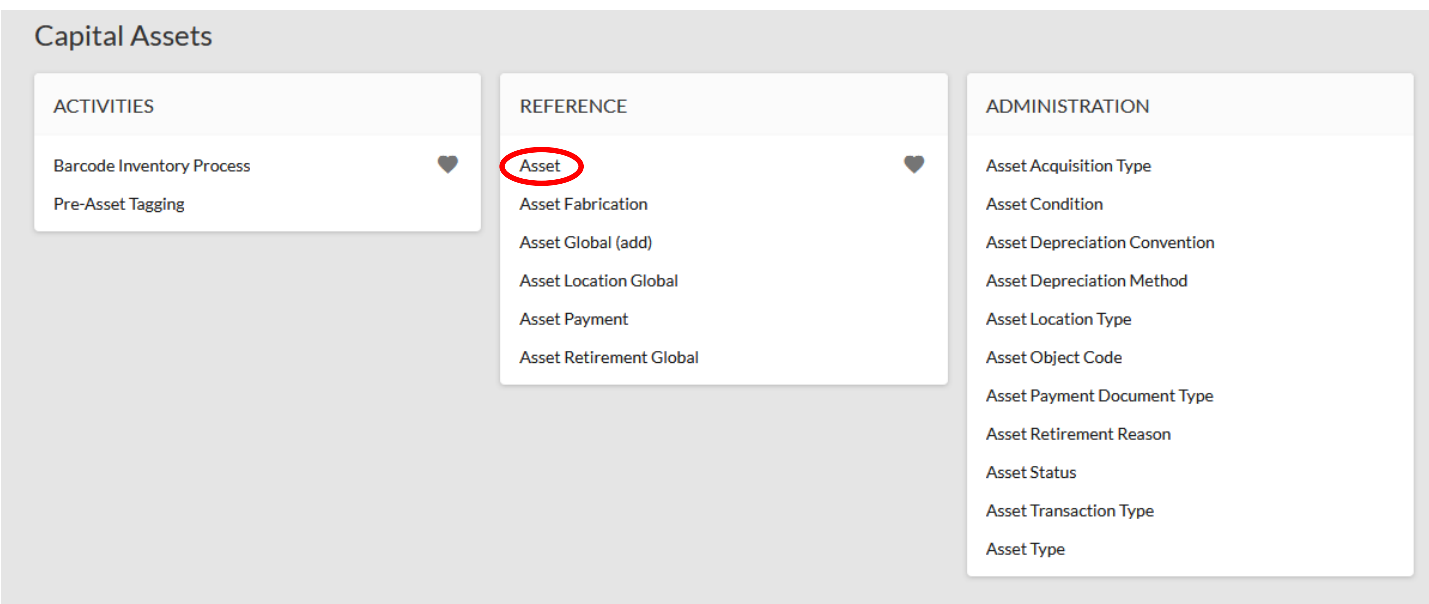
Creating a Responsible Person Change Document in Kuali

PURPOSE: To transfer the responsibility of an asset from one person to another.

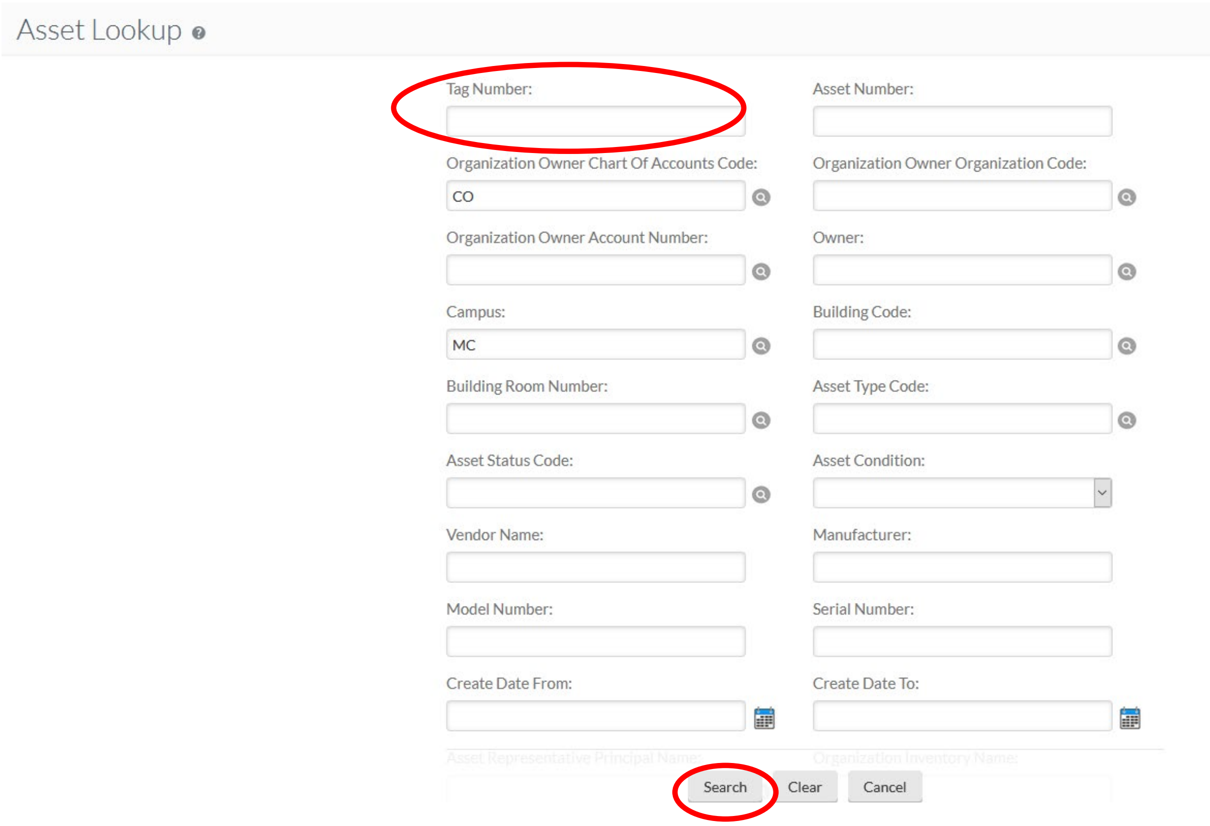
From the Main Menu screen, click on **Capital Assets.**



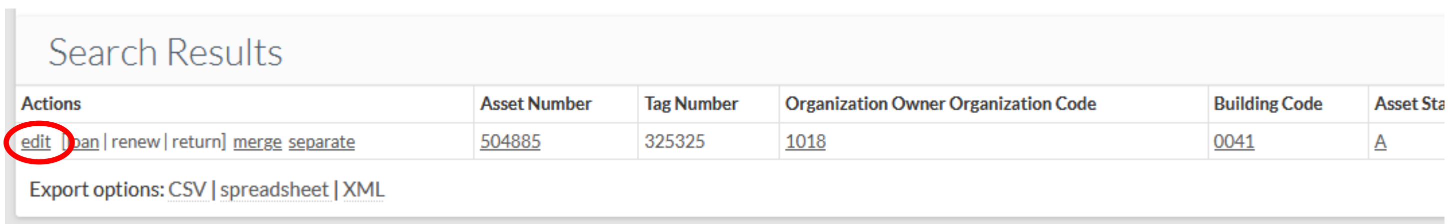
In the **Reference** box, click on the **Asset** link.



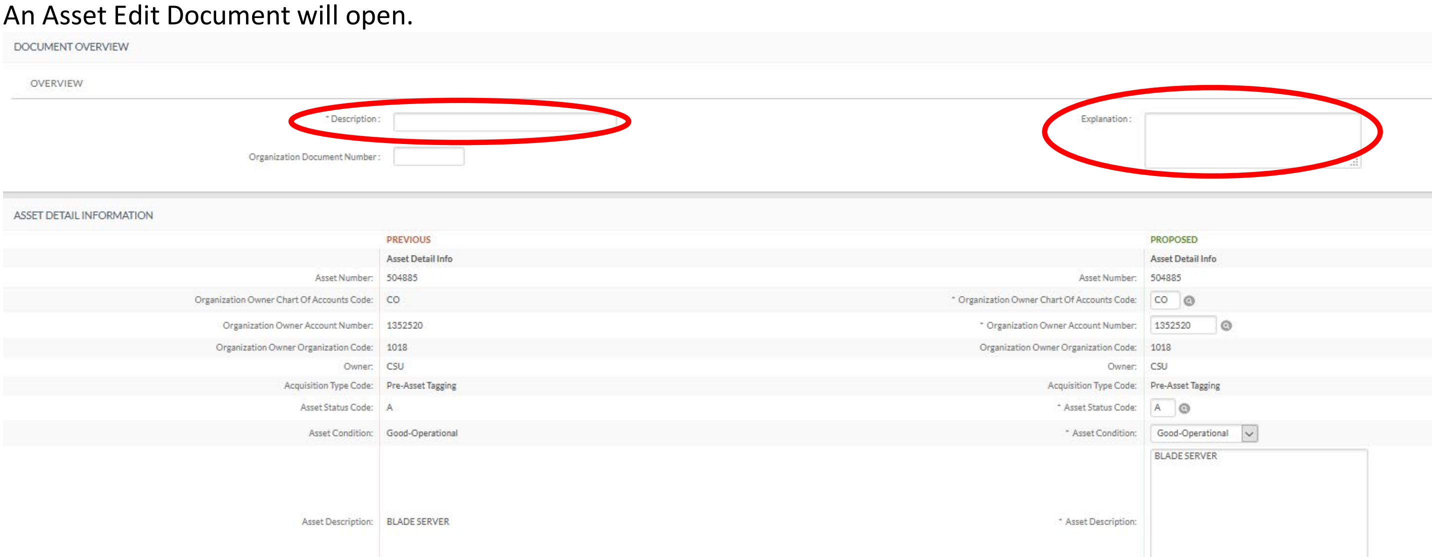
The Asset Lookup screen will open. Search for an asset by entering known asset information, such as the **Tag Number** (CSU decal number). After entering known information, click on the **Search** button.



When the search results are retrieved, confirm it is the correct asset and click on **Edit** in the actions box.



An Asset Edit Document will open.



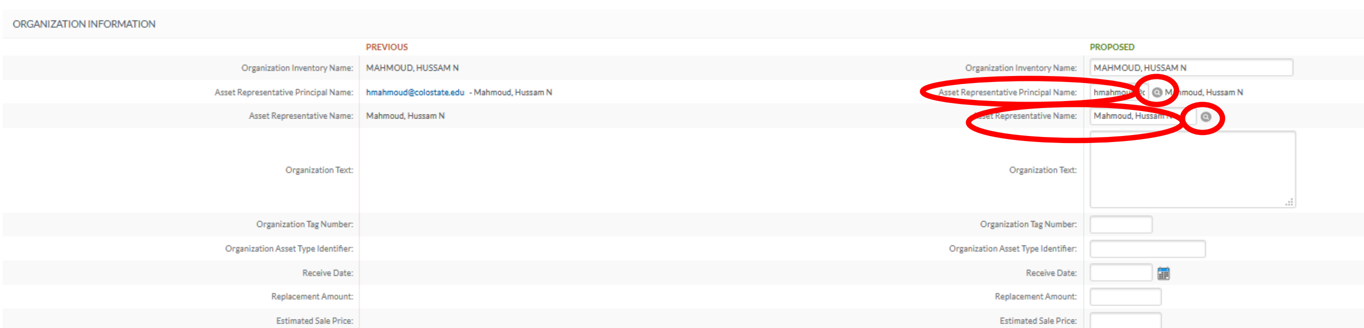
Enter a **Description** in the **Document Overview** tab. *Example:* Updating Responsible Party

Use the explanation field (also located in the **Document Overview** tab) to enter any specific notes regarding why a change of responsible party is being submitted. *Example:* PI retired.

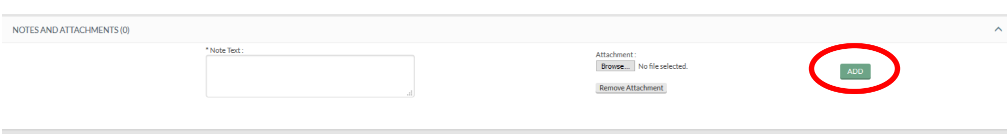
In the **Asset Detail Information** tab, the current asset information is on the left and a place to enter the **Proposed** (new) information is on the right.

In the **Asset Location** tab, if the asset will be physically moved to a new location, enter the proposed **Building Code** and/or **Building Room Number** fields. Search for these codes by clicking on the magnifying glass icon and searching by building name. *Note:* If the asset is in the same location shown, skip to the next tab.

In the **Organization Information** tab, update the proposed (new) **Asset Representative Principal Name.** Click on the magnifying glass icon to the right of the field to search for the new asset representative's name. *Note*: When the Person Lookup screen appears, delete the current name in the **Principal Name** field. Enter the new name in the **Last Name** field and click on search. Once results are retrieved, select the correct person, then click on **return value**. You will return to the document. *Note:* The **Asset Representative Name** field will auto-fill with the same name as the **Asset Representative Principal Name**.



Provide any notes and attachments in the **Notes and Attachments** tab. You must click on the **Add** button or you will lose the attachment.



Click on submit when you are finished. You should see the message **Document was successfully submitted** at the top of the document. If you see an error message instead (in red lettering), read the explanation of the problem – correct the error and resubmit.