Creating a Loan or Renew or Return Document in Kuali

**PURPOSE:** To track equipment located at an off-campus location for more than 30 days.

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

![Capital Assets menu](image)

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

![Capital Assets screen](image)

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. Click on loan in the actions box at the left for an initial loan, renew for a renewal, or return for a loan return to campus. Note: The available options you can use will be underlined.

LOAN: Click on loan. The Loan document will open.

1. Enter a Description and brief Explanation in the Document Overview tab.
2. Review the asset information in the Asset tab.
3. In the Equipment Loans tab, use the magnifying glass lookup icon for the Borrower ID.
   a. Borrower ID:
      i. The borrower id entered on the loan document must be an active CSU employee in KFS. Usually this is the PI, faculty member, or other staff member in possession of the equipment.
      ii. If the borrower is not an active KFS user, enter an active user’s name within the department (e.g., the Department Property Contact [DPC]) and record the actual borrower’s name in the Notes and Attachments tab.
4. The **Loan Date** auto-fills with the current date, although you can manually change it if needed.

5. Enter the **Expected Return Date**. The document will only allow you to enter a return date two (2) years or less from the current date. You will need to renew the loan every two years if the equipment is being loaned long term.

6. Complete the **Borrower’s Address** tab with the borrower’s personal address, do not use a CSU office/lab address. *Note:* The address does not auto-fill based on the user ID. If the equipment is located and stored at the same location, the user will only need to complete the borrower’s address. Otherwise, the stored at (housed at) location will need to be completed in addition to the borrower’s address.

7. 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.

**RENEW:** Repeat the procedure used to look up an asset. *Note:* An asset must currently be in loan status in CAM to be able to use renew. If the renew link is not underlined, then the asset is not currently on loan. Click on **renew**. The Loan document will open.

1. Enter a **Description** and brief **Explanation** in the **Document Overview** tab.
2. Review the asset information in the **Asset** tab.
3. In the **Equipment Loans** tab, the **Loan Date** auto-fills with the current date, although you can manually change it if needed.
4. Enter the **Expected Return Date**. The document will only allow you to enter a return date two (2) years or less from the current date. You will need to renew the loan again in two years if the equipment is being loaned long term.
5. Attach a completed Inventory Verification of Loaned Assets form (located on the last page of this document) in the **NOTES AND ATTACHMENTS** tab. Remember to click on the **ADD** button to attachment it to the document.

6. 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.

**RETURN:** Repeat the procedure used to look up an asset. *Note:* An asset must currently be in loan status in CAM to be able to use return. If the return link is not underlined, then the asset is not currently on loan. Click on **return**. The Loan document will open.

1. Enter a **Description** and brief **Explanation** in the **Document Overview** tab.
2. Review the asset information in the **Asset** tab.
3. In the **Equipment Loans** tab, the **Loan Return Date** is auto populated with the current date, although you can manually change it if needed.
4. Enter the **Return Date**. The Return Date must be within two (2) years or less from the original loan date and cannot be before the original loan date.

5. 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.

6. Check the asset record to review the listed location of the asset. **Note:** The return document does not allow you to update the location of the asset. If the asset was returned to a location other than the listed location in the asset record, submit an Asset Edit document to update the record to reflect the current location of the asset.
Inventory verification of loaned assets
Business and Financial Services
Property Management Office

Dear Asset Representative

Date

Colorado State University is conducting a biennial physical inventory of capital assets including all off site controlled property.

Property has been loaned to you for use on a collaborative project and our records show the following item(s) in your possession:

Please:
1) Physically verify that you have these items with a submission of a date stamped photograph of its CSU id tag or serial number. Photograph may be waived in certain circumstances—please partner with your Department Property Contact.
2) Verify the property record details are accurate
3) List any CSU property not included above
4) E-mail this completed affidavit and photograph(s) to the CSU Property Management Office bfs_property_management@colostate.edu

Affidavit:
I affirm that all property containing a CSU id tag, listed above, is in my possession, and has been physically inventoried.

Name ___________________________ Title ___________________________ Date ________________

If the property is no longer in your possession, please provide detailed information on its current location and custodian. Attach any supporting correspondence or documentation in addition to this affidavit.

Name ___________________________ Title ___________________________ Date ________________

If you have any questions, please feel free to contact the Property Management Office at Colorado State University at bfs_property_management@colostate.edu or (970) 491-2270