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.