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# **FPMT Combined Data Requirements – Overview**

This checklist provides an overview of the steps needed to complete both the 2024 Facilities Inventory and 2025-31 Six-Year Facilities Plan baseline data collection processes in FPMT. For Agency Desired Plan instructions, click [here](https://ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2025-2031/Agency%20Desired%20Plan.pdf). As of April 2024, there is only one agency editor role in FPMT, which has permissions to all wizards. Refer to the [What’s New in FPMT](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/What%27s%20New%20with%20FPMT.pdf) job aid for an overview of wizard changes.

Data requirements are organized by whether facilities are in scope or out of scope for the Six-Year Facilities Plan. In-scope facilities have data requirements in addition to inventory data. Requirements are further refined by type of facility. For receivable leased facilities, lessor (master lease holder or owning agency) responsibilities are detailed as a subsection of owned and leased facilities. Tenant agency responsibilities are listed separately.

**Due Dates**: All data must be submitted to OFM no later than **June 23, 2024**. New owned and leased facilities must be entered no later than **June 1**.

* Click the arrows on the left to expand or collapse each section. Each task includes a link to an associated job aid with step-by-step instructions.
* Manual editing permissions have been reduced to improve data quality. Agency editors are now required to use business process wizards.
* Definitions of Facility, Lease and Receivable Lease:
* **Facility**: a building with at least one wall, a roof and a permanent foundation, regardless of occupancy or cost.
* **Lease**: a lease contract, MOU, IAA, RSA, federal license, or any other type of agreement for space regardless of whether there is an exchange of money (e.g., $0 leases).
* **Receivable Lease** (or sublease): a lease agreement between an agency that owns a building or is the holder of the master lease and a tenant. This includes DES Occupancy Agreements for space on the Capitol Campus.
* To see a list of your agency’s in-scope facilities, run the [Agency Desired Six Year Facilities Plan](https://ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2025-2031/Agency%20Desired%20Plan.pdf) report.
* To create a new FPMT account, refer to the [Request New User Account](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Request%20New%20User%20Account.pdf) job aid.
* To reset your FPMT password, refer to the [Reset Password](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Reset%20or%20Change%20Password.pdf) job aid.
* For a basic overview of the FPMT user interface, refer to the [Quick Overview and Basic Navigation](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Quick%20Overview%20and%20Basic%20Navigation.pdf) job aid and [Intro to FPMT eLearning](https://ofm.wa.gov/it-systems/facility-system/facilities-portfolio-management-tool-fpmt/introduction-fpmt-facilities-users-elearning).
* Please refer to the [Naming Conventions](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Naming%20Conventions.pdf) job aid for guidance on how to name each table in FPMT.
* For assistance with FPMT, please contact the OFM Help Desk at HeretoHelp@ofm.wa.gov or (360) 407-9100.
* For questions about the Facilities Inventory or Six-Year Facilities Plan, please contact your assigned [Facilities Analyst](https://ofm.wa.gov/facilities/state-agency-facility-oversight/facilities-oversight-staff-agency-assignments) or send an email to OFM Facilities Oversight and Planning at ofmfacilitiesoversig@ofm.wa.gov.

# 1. Update Existing In-Scope Facility Data

##  **Owned Facilities**

### [ ]  Update current owned facilities

* Verify existing data is accurate.
* Add or update [workstation counts](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Workstation%20Data.pdf), if not current.
* Add or update facility [condition assessment score](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf), if not current.
* Add debt service, if applicable – if you need to report debt service that is not already captured in FPMT, contact your [assigned facilities analyst](https://ofm.wa.gov/facilities/state-agency-facility-oversight/facilities-oversight-staff-agency-assignments), and OFM will work with you to import the data.
* Report [available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable.

#### [ ]  Update existing receivable leases, if applicable.

##### [ ]  Receivable leases expiring before June 30, 2024

* **Receivable lease renewals** – use the FPMT [receivable lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Lease%20Renewal%20-%20Facility.pdf) and attach a copy of the receivable lease (outside of wizard, instructions included in renewal job aid).
* **Receivable lease extensions** – use the Receivable Review wizard to add a [receivable lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and update the receivable lease contract and receivable lease payment end dates; attach a copy of the amendment.
* [**Holdover status**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Holdover%20Status%20-%20Facility.pdf) (expired lease; agency will continue in space, but new lease has not been executed yet) – use the Receivable Review wizard to update the Holdover Status field in the receivable contract table to “yes” and add a note in the Comment field. Do not change the receivable contract end date.
* **End a lease** – use the [receivable leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf) if the receivable lease contract is not being renewed or extended.

[ ]  Receivable leases expiring on or after June 30, 2024 (update only if needed)

* **Make lease month-to-month** – use the Receivable Review wizard to update the [Month-to-Month](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Month-To-Month-Facility.pdf) field in the receivable contract table to “yes” and add a note in the Comment field.
* [**Add a copy of the receivable contract**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Upload%20Lease%20and%20Receivable%20Contracts%20-%20Facility.pdf) to FPMT, if not already attached.
* **Receivable amendments** (other than extension) – use the Receivable Review wizard to add a [receivable lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and edit other tables as needed; attach a copy of the amendment.
* **Cancel a lease** – use the [receivable leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).

#### [ ]  Add receivable lease(s),if applicable.

* Complete [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard.
* Attach copy of receivable contract.
* Notify the tenant agency when the receivable lease has been created so they can make

 their required system updates.

[ ]  Remove an owned facility from the agency’s portfolio

* **Demolished or sold** – use the [owned facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If staff are relocating to a facility that is not currently part of the agency’s portfolio, see [Section 3. Add New Facilities](#_3._Add_New).
* **Transfer a facility** – contact OFM at ofmfacilitiesoversig@ofm.wa.gov for the administrative change. OFM will assist the new owning agency with next steps.

##  **Leased Facilities**

* Verify existing data is accurate.
* Add or update facility [condition assessment score](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf), if not current.
* Add or update [workstation counts](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Workstation%20Data.pdf), if not current.
* Report [available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable.

### [ ]  Update existing leases.

####  [ ]  Standard leases

#####  [ ]  Leases expiring before June 30, 2024

* **Lease renewals** – use the [lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20Renewal%20-%20Facility.pdf) and attach supporting lease documentation (outside of wizard, instructions included in renewal job aid).
* **Lease extensions** – use the Lease Review wizard to add a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and update the lease contract and lease payment end dates; attach a copy of the amendment (outside of the wizard).
* **One-time cost fields** (for renewals, extensions and holdover) – use the Lease Review wizard to populate the new [one-time cost fields](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/One-Time%20Cost%20Fields.xlsx) in the Lease Contract table, if applicable. Do not leave these fields blank if they apply to the space. If actuals are not available, use an estimate. When actuals are available, update the record.
* **[Holdover status](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Holdover%20Status%20-%20Facility.pdf)** (expired lease; agency will continue in space, but new lease has not been executed yet) – use the Lease Review wizard to update the Holdover Status field in the lease contract table to “yes” and add a note in the Comment field.
* **End a lease** (vacating facility) – use the [leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If relocating to a facility that is not currently part of the agency’s portfolio, see [Section 3. Add New Facilities](#_3._Add_New).
* If staff are relocating to a facility that is not currently part of the state’s

 inventory, create a new facility to generate a new UFI before deactivating the

 old facility.

* If staff are relocating, ensure to populate the Relocation UFI and Relocation

 Contract Number when prompted in the deactivation wizard.

#####  [ ]  Leases expiring on or after June 30, 2024 (update only if needed)

* **Make lease month-to-month** – use the Lease Review wizard to update the [Month-to-Month](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Month-To-Month-Facility.pdf) field in the lease contract table to “yes” and add a note in the Comment field.
* [**Add a copy of the lease contract**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Upload%20Lease%20and%20Receivable%20Contracts%20-%20Facility.pdf) to FPMT, if not already attached.
* **Lease amendments** (other than extension) – use the Lease Review wizard to add a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and edit other tables as needed; attach a copy of the amendment (outside of the wizard).
* **Cancel a lease** (vacating facility) – use the [leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If relocating to a facility that is not currently part of the agency’s portfolio, see [Section 3. Add New Facilities](#_3._Add_New).
* If staff are relocating to a facility that is not currently part of the state’s

 inventory, create a new facility to generate a new UFI before deactivating

 the old facility.

* If staff are relocating, ensure to populate the Relocation UFI and Relocation

 Contract Number when prompted in the deactivation wizard.

####  [ ]  Master leases with one or more receivable leases

#####  [ ]  Master leases expiring before June 30, 2024

* **Lease renewals** – use the [master lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Master%20Lease%20and%20Receivable%20Lease%20Renewal%20-%20Facility.pdf) and attach supporting lease and receivable lease documentation (outside of wizard, instructions included in renewal job aid).

 **Note: Receivable leases must be renewed at the same time as the master lease or they will be automatically deactivated.**

* **Lease extensions** – use the Lease Review wizard to add a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and update the lease contract and lease payment end dates; attach a copy of the amendment (outside of the wizard). If the receivable lease is also being extended, follow same steps for receivable lease using the Receivable Review wizard. If the receivable lease is not being continued, use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).
* **One-time cost fields** (for renewals, extensions and holdover) – use the Lease Review wizard to populate the new [one-time cost fields](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/One-Time%20Cost%20Fields.xlsx) in the Lease Contract table, if applicable. Do not leave these fields blank if they apply to the space. If actuals are not available, use an estimate. When actuals are available, update the record. If one-time costs apply to the receivable lease, the tenant agency will work with OFM to report the data.
* [**Holdover status**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Holdover%20Status%20-%20Facility.pdf) (expired lease; agency will continue in space, but new lease has not been executed yet) – use the Lease Review wizard to update the Holdover Status field in the lease contract table to “yes” and add a note in the Comment field. If the receivable lease is also in holdover status, follow same steps for the receivable lease using the Receivable Review wizard. If the receivable lease is not being continued, use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).
* **End a lease** (vacating facility) – use the [leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If staff are relocating to a facility that is not currently part of the agency’s portfolio, see [Section 3. Add New Facilities](#_3._Add_New).
* If staff are relocating to a facility that is not currently part of the state’s

 inventory, create a new facility to generate a new UFI before deactivating the

 old facility.

* If staff are relocating, ensure to populate the Relocation UFI and Relocation

 Contract Number when prompted in the deactivation wizard.

#####  [ ]  Master leases expiring on or after June 30, 2024 (update only if needed)

* **Receivable lease renewal** (expiring before master lease) – use the [receivable lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Lease%20Renewal%20-%20Facility.pdf) and attach supporting receivable lease documentation (outside of wizard, instructions included in job aid).
* **Make the master and/or receivable lease month-to-month** – use the Lease Review wizard to update the [Month-to-Month](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Month-To-Month-Facility.pdf) field in the lease contract table to “yes” and/or use the Receivable Review wizard to update the [Month-to-Month](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Month-To-Month-Facility.pdf) field in the receivable lease contract table to “yes.” Add a note in the Comment field to indicate why the contract is month-to-month.
* [**Add a copy of the lease and receivable lease contracts**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Upload%20Lease%20and%20Receivable%20Contracts%20-%20Facility.pdf)to FPMT, if not already attached.
* **Master lease amendments** (other than extension) – use the Leave Review wizard to add a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and edit other tables as needed; attach a copy of the amendment (outside of the wizard).
* **Receivable lease amendments** (other than extension) – use the Receivable Review wizard to add a [receivable lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and edit other tables as needed; attach a copy of the amendment (outside of the wizard).
* **Cancel a receivable lease –** use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).
* **Cancel a master lease –** use the [leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If staff are relocating to a facility that is not currently part of the agency’s portfolio, see [Section 3. Add New Facilities](#_3._Add_New).

### [ ]  Add new receivable lease(s) (if applicable).

* Complete [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard.
* Attach copy of receivable contract.
* Notify the tenant agency when the receivable lease has been created so they can make their

 required system updates.

##  **Receivable Facilities (Tenant Agency)**

* If an office space location has renewed or relocated in fiscal year 2024, populate the receivable tenant [one-time cost spreadsheet](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Tenant%20One-Time%20Costs.xlsx) and send it to your assigned facilities analyst. Tenant agencies are unable to edit the receivable contract table in FPMT. If one-time costs are applicable and actuals are not available, use an estimate. When actuals are available, send an updated spreadsheet.
* Add/update [workstation counts](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Workstation%20Data.pdf).

# 2. Update Existing Out-of-Scope Facility Data (If Applicable)

## **Owned Facilities**

### [ ]  Update current owned facilities

* Verify existing data is accurate.
* Add or update [condition assessment score](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf), if not current.
* Report [available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable.

#### [ ]  Update existing receivable lease(s), if applicable.

##### [ ]  Leases expiring before June 30, 2024

* **Lease renewals** – use the FPMT [receivable lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Lease%20Renewal%20-%20Facility.pdf) and attach a copy of the receivable lease (outside of wizard, instructions included in renewal job aid).
* **Lease extensions** – use the Receivable Review wizard to add a [receivable lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and update the receivable lease contract and receivable lease payment end dates; attach a copy of the amendment.
* [**Holdover status**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Holdover%20Status%20-%20Facility.pdf) (expired lease; agency will continue in space, but new lease has not been executed yet) – use the Receivable Review wizard to update the Holdover Status field in the receivable lease contract table to “yes.”
* **End a receivable lease** – use the [receivable leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf) if the receivable lease contract is not being renewed or extended.

##### [ ]  Leases expiring on or after June 30, 2024 (update only if needed)

* **Lease amendments** (other than extension) – add a [receivable lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and edit other tables as needed using the Receivable Review wizard; attach a copy of the amendment.
* **Make receivable lease month-to-month** – use the Receivable Review wizard to update the [Month-to-Month](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Month-To-Month-Facility.pdf) field in the receivable lease contract table to “yes” and add a note in the Comment field.
* [**Add a copy of the receivable lease contract**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Upload%20Lease%20and%20Receivable%20Contracts%20-%20Facility.pdf) to FPMT, if not already attached
* **Cancel a receivable lease** – use the [receivable leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).

####  [ ]  Add receivable lease(s), if applicable.

* Complete [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard.
* Attach copy of receivable contract.

[ ]  Remove an owned facility from the agency’s portfolio.

* **Demolished or sold** – use the [owned facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If staff are relocating to a facility that is not currently part of the agency’s portfolio, see [Section 3. Add New Facilities](#_3._Add_New).
* **Transfer a facility** – contact OFM at ofmfacilitiesoversig@ofm.wa.gov for the administrative change. OFM will assist the new owning agency with next steps.

## **Leased Facilities**

* Verify existing data is accurate.
* Add or update [condition assessment score](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf), if not current.
* Report [available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable.

### [ ]  Update existing leases.

####  [ ]  Standard leases

#####  [ ]  Leases expiring before June 30, 2024

* **Lease renewals** – use the [lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20Renewal%20-%20Facility.pdf) and attach supporting lease documentation (outside of wizard, instructions included in renewal job aid).
* **Lease extensions** – use the Lease Review wizard to add a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and update the lease contract and lease payment end dates; attach a copy of the amendment (outside of the wizard).
* [**Holdover status**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Holdover%20Status%20-%20Facility.pdf) (expired lease; agency will continue in space, but new lease has not been executed yet) – use the Lease Review wizard to update the Holdover Status field in the lease contract table to “yes” and add a note in the Comment field.
* **End a lease** (vacating facility) – use the [leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If relocating to a facility that is not currently part of the agency’s portfolio, see [Section 3. Add New Facilities](#_3._Add_New).

#####  [ ]  Leases expiring on or after June 30, 2024 (update only if needed)

* **Make lease month-to-month** – use the Lease Review wizard to update the [Month-to-Month](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Month-To-Month-Facility.pdf) field in the lease contract table to “yes” and add a note in the Comment field.
* [**Add a copy of the lease contract**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Upload%20Lease%20and%20Receivable%20Contracts%20-%20Facility.pdf) to FPMT, if not already attached.
* **Lease amendments** (other than extension) – use the Lease Review wizard to add a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and edit other tables as needed; attach a copy of the amendment (outside of the wizard).
* **Cancel a lease** (vacating facility) – use the [leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If relocating to a facility that is not currently part of the agency’s portfolio, see [Section 3. Add New Facilities](#_3._Add_New).

####  [ ]  Master leases with one or more receivable leases

#####  [ ]  Master leases expiring before June 30, 2024

* **Lease renewals** – use the [master lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Master%20Lease%20and%20Receivable%20Lease%20Renewal%20-%20Facility.pdf) and attach supporting lease and receivable lease documentation (outside of wizard, instructions included in renewal job aid).

 **Note: Receivable leases must be renewed at the same time as the master lease or they will be automatically deactivated.**

* **Lease extensions** – use the Lease Review wizard to add a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and update the lease contract and lease payment end dates; attach a copy of the amendment (outside of the wizard). If the receivable lease is also being extended, follow same steps for receivable lease using the Receivable Review wizard. If the receivable lease is not being continued, use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).
* [**Holdover status**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Holdover%20Status%20-%20Facility.pdf) (expired lease; agency will continue in space, but new lease has not been executed yet) – use the Lease Review wizard to update the Holdover Status field in the lease contract table to “yes” and add a note in the Comment field. If the receivable lease is also in holdover status, follow same steps for the receivable lease using the Receivable Review wizard. If the receivable lease is not being continued, use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).
* **End a lease** (vacating facility) – use the [leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If staff are relocating to a facility that is not currently part of the agency’s portfolio, see [Section 3. Add New Facilities](#_3._Add_New).

#####  [ ]  Master leases expiring on or after June 30, 2024 (update only if needed)

* **Receivable lease renewal** (expiring before master lease) – use the [receivable lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Lease%20Renewal%20-%20Facility.pdf) and attach supporting receivable lease documentation (outside of wizard, instructions included in job aid).
* **Make the master and/or receivable lease month-to-month** – use the Lease Review wizard to update the [Month-to-Month](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Month-To-Month-Facility.pdf) field in the lease contract table to “yes” and/or use the Receivable Review wizard to update the [Month-to-Month](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Month-To-Month-Facility.pdf) field in the receivable lease contract table to “yes.” Add a note in the Comment field to indicate why the contract is month-to-month.
* [**Add a copy of the lease and receivable lease contracts**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Upload%20Lease%20and%20Receivable%20Contracts%20-%20Facility.pdf)to FPMT, if not already attached.
* **Master lease amendments** (other than extension) – use the Leave Review wizard to add a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and edit other tables as needed; attach a copy of the amendment (outside of the wizard).
* **Receivable lease amendments** (other than extension) – use the Receivable Review wizard to add a [receivable lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and edit other tables as needed; attach a copy of the amendment (outside of the wizard).
* **Cancel a receivable lease –** use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).
* **Cancel a master lease –** use the [leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If staff are relocating to a facility that is not currently part of the agency’s portfolio, see [Section 3. Add New Facilities](#_3._Add_New).

### [ ]  Add new receivable lease(s) (if applicable)

* Complete [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard.
* Attach copy of receivable contract.

# 3. Add New Facilities (If Applicable)

##  **In-Scope Facilities**

### [ ]  Owned Facilities

####  [ ]  [Add new owned facility](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Owned%20Facility.pdf) using FPMT creation wizard.

* Ensure the Facility Type field value in the facility table is “building.”
* Ensure the Facilities Inventory field value in the facility table is “yes.”
* If the facility serves as a duty station for staff, ensure the HRMS field value in the facility

 table is “yes.”

* Geocode the facility (put a point on the map).
* Ensure the [condition assessment score](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf) is populated in the owned facility table.
* Ensure that the Six Year Facilities Plan field value in the owned facility table is “yes.”
* Add debt service – if you need to add debt service to FPMT, contact your [facilities analyst](https://ofm.wa.gov/facilities/state-agency-facility-oversight/facilities-oversight-staff-agency-assignments), and OFM will work with you to import the data.
* Add [workstation counts](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Workstation%20Data.pdf) in the space table.
* [Report available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable.

####  [ ]  Add new receivable lease(s) (if applicable)

* Complete [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard
* Attach copy of receivable contract
* Notify the tenant agency when the receivable lease has been created so they can make

 their required system updates.

### [ ]  Leased Facilities

 [ ]  Search FPMT for the new facility address to see if it is currently, or was previously, occupied by

 another agency. If the facility already exists in the inventory, you will link to it as part of the

 new leased facility wizard process. If the facility does not exist in the inventory, you will create a

 new one as part of the wizard process. Search instructions included in wizard job aid.

####  [ ]  [Add new leased facility](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Leased%20Facility.pdf) using FPMT creation wizard.

* Ensure the [condition assessment score](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf) in the leased facility table is populated.
* Ensure the Six Year Facilities Plan field value in the leased facility table is “yes.”

##### [ ]  If the facility is not already in the inventory, create new facility (vs. linking to one)

* Ensure the Facility Type field value in the facility table is “building.”
* Ensure the Facilities Inventory field value in the facility table is “yes.”
* If the leased facility is a duty station for staff, ensure the HRMS field value in the

 facility table is “yes.”

* Geocode the facility (put a point on the map).
* If this is a relocation of office space, populate the new [one-time cost fields](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/One-Time%20Cost%20Fields.xlsx) in the Lease

 Contract table, if applicable. Do not leave these fields blank if they apply to the space. If

 actuals are not available, use an estimate. When actuals are available, update the record.

* Add [workstation counts](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Workstation%20Data.pdf) in the space table.
* [Report available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable.
* Attach copy of lease contract in the lease contract table.

####  [ ]  Add new receivable lease(s) (if applicable).

* Complete the [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard.
* Attach copy of receivable contract in the receivable contract table.
* Notify the tenant agency when the receivable lease has been created so they can make

 their required system updates.

### [ ]  Receivable Leased Facilities (Tenant Agency)

* If an office space location has renewed or relocated in fiscal year 2024, populate the receivable tenant [one-time cost spreadsheet](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Tenant%20One-Time%20Costs.xlsx) and send it to your assigned facilities analyst. Tenant agencies are unable to edit the receivable contract table in FPMT. If one-time costs are applicable and actuals are not available, use an estimate. When actuals are available, send an updated spreadsheet.
* Add/update [workstation counts](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Workstation%20Data.pdf).

##  **Out-of-Scope Facilities**

### [ ]  Owned Facilities

####  [ ]  Add new owned facility using [FPMT creation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Owned%20Facility.pdf).

* Ensure the Facility Type field value in the facility table is “building.”
* Ensure the Facilities Inventory field value in the facility table is “yes.”
* If the owned facility is a duty station for staff, ensure the HRMS field value in the facility

 table is “yes.”

* Geocode the facility (put a point on the map).
* Ensure [condition assessment score](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf) in the owned facility table is populated.
* [Report available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable.

####  [ ]  Add new receivable lease(s) (if applicable)

* Complete the [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard.
* Attach copy of receivable contract in the receivable contract table.

### [ ]  Leased Facilities

 [ ]  Search FPMT for the new facility address to see if it is currently, or was previously, occupied by

 another agency. If the facility already exists in the inventory, you will link to it as part of the

 new leased facility wizard process. If the facility does not exist in the inventory, you will create

 a new one as part of the wizard process. Search instructions included in wizard job aid.

####  [ ]  [Add new leased facility](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Leased%20Facility.pdf) using FPMT creation wizard.

* Ensure the [condition assessment score](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf) in the leased facility table is populated.

##### [ ]  If the facility is not already in the inventory, create new facility (vs. linking to one)

* Ensure the Facility Type field value in the facility table is “building.”
* Ensure the Facilities Inventory field value in the facility table is “yes.”
* If the leased facility is a duty station for staff, ensure the HRMS field value in the

 facility table is “yes.”

* Geocode the facility (put a point on the map).
* [Report available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable.
* Attach copy of lease contract in the lease contract table.

####  [ ]  Add new receivable lease(s) (if applicable).

* Complete the [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard.
* Attach copy of receivable contract in the receivable contract table.

# 4. Validate Data

* Run the [QA report](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/FPMT%20QA%20Report%20-%20Facilities.pdf) in FPMT and review for potential errors.
* Refer to the [QA Report Correction Steps](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/QA%20Report%20Correction%20Steps.xlsx) job aid for guidance on how to correct errors.
* Correct any errors in the report.
* After errors are corrected, rerun QA report to ensure all errors have been addressed.

# 5. Submit Data

* [Notify OFM](https://ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2025-2031/FPMT%20Data%20Submission.pdf) when inventory and baseline data are complete via FPMT – do not submit data if your

 agency has pending facilities that have not yet been approved by OFM.