Lease and Receivable Lease Amendments - Overview

A lease or receivable lease amendment documents specific changes to an existing contract. Common amendment types include: lease extension, change in square footage, change in rental rate and adding or deleting lease options.

- A lease amendment is added from the Lease Contract table.
- A receivable lease amendment is added from the Receivable Lease Contract table.
- Depending on what type of change is being made, you may need to update additional tables to reflect the new lease terms.
- Please refer to the table on page 6 for an overview of action steps to take for each type of amendment.
- If the leased or receivable leased facility is in scope for the Six-Year Facilities Plan, you must attach a copy of the amendment document to the Lease Amendment or Receivable Lease Amendment tile, as applicable. Refer to the Quick Overview job aid for instructions on how to attach documents in FPMT.

Contents
Lease and Receivable Lease Amendments - Overview .................................................................................................................................................................................. 1
Add a Lease Amendment ................................................................................................................................................................................................................. 2
Add a Receivable Lease Amendment ................................................................................................................................................................................................. 4
Table Updates Required by Amendment Type ................................................................................................................................................................................ 6
Add a Lease Amendment

1. **Search** for the Lease Contract tile
   - A. Click the **Search** button on the data explorer menu
   - B. Click **Filter by** and choose **Lease Contracts** from the dropdown menu
   - C. Click **Refine by** and choose **Lease Number** from the dropdown menu
   - D. Enter the lease number
   - E. Click the **Search** button

2. Click the **menu** button on the Lease Contract tile
3. Click **Add**
4. Select Lease Amendment
5. Select Create a new Lease Amendment
6. **Enter** agency data – red fields are required

Field-specific guidance:

**Name:** Use the amendment type and amendment number

Example: Lease Extension-1

**Amendment Number:** Amendments should be number sequentially in the order they were executed.

Example: 1, 2, 3

**Amendment Type:** Dropdown menu

**Amendment Description:** The description should provide a brief summary of what has changed in the lease.

Example: The ownership of the facility Changed from Peninsula LLC to Joe and Associates LLC.

⇒ If your amendment type requires an edit to the lease contract table, you can make the update(s) before saving. See note about advanced edit mode on page 4.

7. **Click** SAVE AND CLOSE

8. **Refer** to table on page 6 for additional updates that may be required.
Lease and Receivable Lease Amendments
Facilities Portfolio Management Tool (FPMT)

**Add a Receivable Lease Amendment**

1. **Search** for the Receivable Lease Contract tile
   - A. **Click** the **Search** button on the data explorer toolbar
   - B. **Click** **Filter by** and choose **Receivable Lease Contracts** from the dropdown menu
   - C. **Click** **Refine by** and choose **Receivable Lease Number** from the dropdown menu
   - D. **Enter** the receivable lease number
   - E. **Click** the **SEARCH** button

2. **Click** the **menu** button on the Receivable Lease Contract tile

3. **Click** **Add**

4. **Select** Receivable Lease Amendment

5. **Select** Create a new Receivable Lease Amendment
6. Enter agency data – red fields are required

Field-specific guidance:

Name: Use the amendment type and amendment number

Example: Lease Extension-1

Amendment Number: Amendments should be number sequentially in the order they were executed.

Example: 1, 2, 3

Amendment Type: Dropdown menu

Amendment Description: The description should provide a brief summary of what has changed in the lease.

Example: The receivable lease square footage has increased from 500 to 800 square feet

→ If your amendment type requires an edit to the receivable lease contract table, you can make the update(s) before saving. See note about advanced edit mode on page 6.

7. Click SAVE AND CLOSE

8. Refer to table on page 6 for additional updates that may be required.
**Lease and Receivable Lease Amendments**
Facilities Portfolio Management Tool (FPMT)

**Table Updates Required by Amendment Type**

![Checkbox](image)

When you click “add” on the lease contract or receivable lease contract tile to add your amendment table, FPMT will automatically put you into advance edit mode. You will see this checkbox marked in the upper right hand corner of your screen. This mode allows you to make edits to the lease contract or receivable lease contract table on the same screen after inputting your amendment data. Simply scroll down to the Lease Contract Properties or Receivable Lease Contract Properties section to make your updates. When you’re done, click **SAVE AND CLOSE**.

<table>
<thead>
<tr>
<th>Amendment Type</th>
<th>Lease Tables</th>
<th>Data Fields/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lease Extension</strong></td>
<td>Lease/Receivable Lease Contract</td>
<td>Lease End Date - Update</td>
</tr>
<tr>
<td></td>
<td>Lease/Receivable Lease Payment</td>
<td>Payment End Date - Update</td>
</tr>
<tr>
<td><strong>Square Feet &amp; Rent Change</strong></td>
<td>Lease/Receivable Lease Contract</td>
<td>Lease Square Feet - Update</td>
</tr>
<tr>
<td></td>
<td>Space(s)</td>
<td>Square Feet - Update</td>
</tr>
<tr>
<td></td>
<td>Lease/Receivable Lease Payment (existing)</td>
<td>Lease Payment Status - Set to Inactive</td>
</tr>
<tr>
<td></td>
<td>Lease/Receivable Lease Payment (new)</td>
<td>Add new lease payment</td>
</tr>
<tr>
<td><strong>Square Feet Change</strong></td>
<td>Lease/Receivable Lease Contract</td>
<td>Lease Square Feet - Update</td>
</tr>
<tr>
<td></td>
<td>Space(s)</td>
<td>Square Feet - Update</td>
</tr>
<tr>
<td><strong>Rent Rate Change</strong></td>
<td>Lease/Receivable Lease Payment (existing)</td>
<td>Lease Payment Status - Set to Inactive</td>
</tr>
<tr>
<td></td>
<td>Lease/Receivable Lease Payment (new)</td>
<td>Add new lease payment</td>
</tr>
<tr>
<td><strong>Add Option(s)</strong></td>
<td>Lease/Receivable Lease Option (new)</td>
<td>Add new lease option</td>
</tr>
<tr>
<td><strong>Delete Option(s)</strong></td>
<td>Lease/Receivable Lease Option (existing)</td>
<td>Lease Option Status - Set to Inactive</td>
</tr>
<tr>
<td><strong>Amend Legal Description</strong></td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td><strong>Revise Parking</strong></td>
<td>Lease/Receivable Lease Contract</td>
<td>Parking Included in Lease - Update if applicable</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Parking Stall Count - Update if applicable</td>
</tr>
<tr>
<td><strong>Ownership Change</strong></td>
<td>Lease/Receivable Lease Contract</td>
<td>Lessor Name - Update</td>
</tr>
</tbody>
</table>