

## Lease Renewal Wizard – Overview

This job aid provides step-by-step instructions for FPMT’s lease renewal wizard. This new user interface simplifies the lease renewal process by: (a) guiding you through each step of the process, (b) automatically linking and unlinking tables as appropriate, (c) automatically changing the status of the old lease, lease payment(s) and lease option(s)/amendment(s) to inactive, and (d) automatically updating the lease number in the leased facility table.

- ✓ The wizard opens in a new window, which will close when you complete the renewal. Once the renewal window closes, you will need to refresh your original FPMT window to see all of the changes.
- ✓ Once you Save and Close the renewal, you cannot go back into the wizard.
- ✓ Make sure to allow enough time to complete the entire renewal process in one sitting. If you time out of FPMT during the renewal process, you will lose your data.
- ✓ You navigate through the wizard by clicking the Next or Previous buttons.
- ✓ The wizard features business rules or validation checks that will alert users to missing data and common data entry errors.
- ✓ Leases should be renewed in the system on or after the new lease start date.
- ✓ At a minimum, a lease renewal must include a completed lease contract and at least one lease payment. You will have the option of editing an existing space or adding a new space or a lease option. The last step is data review, which is optional but recommended.
- ✓ If the leased facility is in scope for the Six-Year Facilities Plan:
  - You can update your occupancy and workstation data inside the wizard by editing the existing space table.
  - You will need to attach a copy of the lease documentation outside of the wizard after you complete the renewal. Instructions are included in this job aid.
- ✓ **To complete this process, you will need a copy of the new lease contract and the expired lease contract number. If you are adding a new space, you will also need the facility UFI (unique facility identifier). If you need to locate a lease number or UFI, run the lease contract inventory report from the agency file.**

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### Questions?

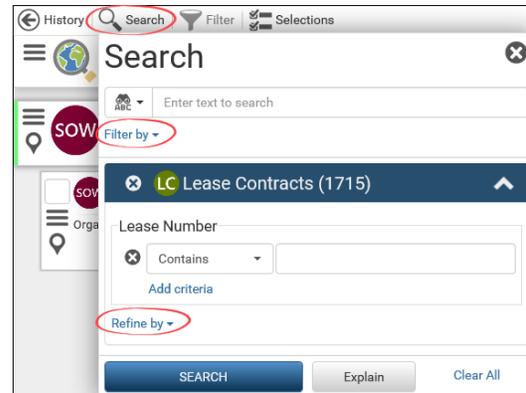


OFM Help Desk  
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### Renew a Lease

1. Navigate to the expiring Lease Contract.

- A. Click the  Search button on the data explorer toolbar
- 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  button

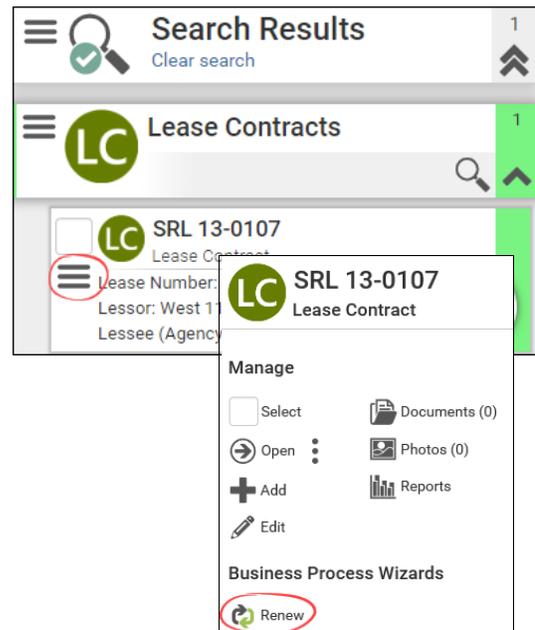


2. Click the  menu button on the Lease Contract tile.

3. Click  Renew under Business Process Wizards

→ FPMT will open the lease renewal wizard in a new window.

→ The system will automatically populate information from the existing lease. You may update this information if there are changes.



### Add a New Lease Contract

1. Fill out the following required fields:

- Name (use the lease number)
  - Note:** Lease numbers must be unique; they cannot be used for more than one record.
- Lease Number
- Lease Executed Date
- Lease Start Date
- Lease End Date



→ If you navigate away from the new lease contract form before properly completing the table, you will receive an error message.

→ You cannot move forward until the error is fixed.

**Note:** This error will show up in every table if you try to save with missing/incorrect data or try to navigate away before properly completing the table. In addition to this error, you will see a message in pink with more detail.

Unable to move to next screen

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Unable to move to next screen until all errors are resolved.

### Errors

- One or more provided values are invalid.

→ In addition to validating that all required fields have been populated, the wizard will also ensure that the lease contract start date is a date prior to the lease contract end date.

→ If you have entered an end date that is prior to the start date, you will receive this error message.

### Errors

- The lease contract start date must be prior to the lease contract end date.

## Add a Lease Payment

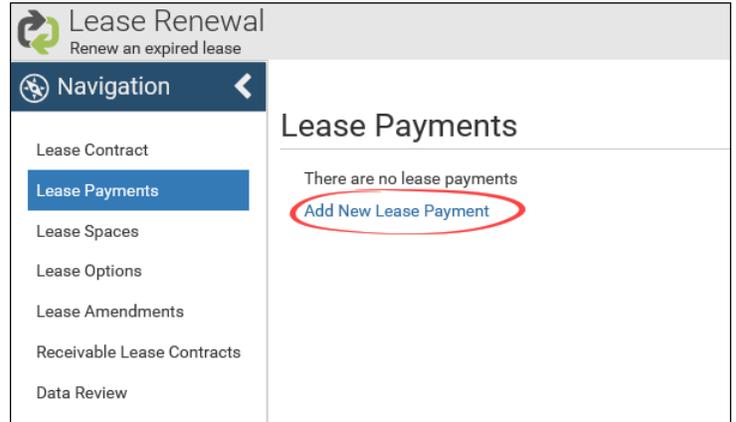
1. Once you have completed the lease contract table, **Click**

**Note:** You cannot save and close the renewal until you add at least one lease payment. If there is no base rent for the facility, enter a lease payment for \$0.

### Lease Contract

|                                       |   |
|---------------------------------------|---|
| Name                                  | <input style="width: 80%;" type="text"/>  |
| Description                           | <input style="width: 80%;" type="text"/>  |
| Lease Number                          | <input style="width: 80%;" type="text"/>  |
| Lessor <small>?</small>               | <input style="width: 80%;" type="text" value="West 1116 Riverside Ave, LLC"/>   |
| Lessee (Agency Name) <small>?</small> | <input style="width: 80%;" type="text" value="Office of the Attorney General - 100"/>   |
| Lease Type                            | <input style="width: 80%;" type="text" value="Lease - A contractual obligation for all or part of a property. This type of"/> |

**2. Click Add New Lease Payment**



**3. Enter data - red fields are required**

Field-specific guidance:

**Name:** Use the payment type and payment series number

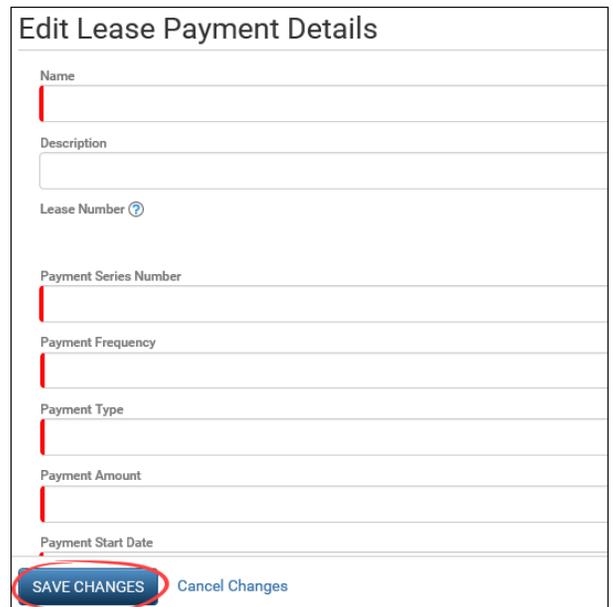
Example: Base Rent - 1

**Payment Type:** Dropdown menu – Base Rent, Amortized TI or Other

**Payment Series Number:** Payments should be numbered sequentially

Example: 1, 2, 3

**4. Click SAVE CHANGES**



The screenshot shows the 'Edit Lease Payment Details' form. Fields include Name, Description, Lease Number, Payment Series Number, Payment Frequency, Payment Type, Payment Amount, and Payment Start Date. The 'SAVE CHANGES' button is circled in red.

→ The lease payment table features the following validation checks:

- All required fields must be completed.
- The lease payment start and end dates must fall within the parameters of the lease start and end dates.

→ The lease payment table cannot be saved until errors are corrected.

**Errors**

- The lease payment start date must be on or after the lease contract start date of 11/1/2019.
- The lease payment end date must be on or before the lease contract end date of 10/31/2021.

→ If you navigate away from the lease payment table before saving or adding a lease payment, you will receive an error.

**Errors**

- One lease payment is required.

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### Lease Payments

There are no lease payments

[Add New Lease Payment](#)

→ Once the lease payment is saved, you can update the information by clicking the details icon or delete the payment by clicking on the trash can.

**Note:** Repeat this process if there is more than one lease payment series. All payments can have an Active status, as reports pull data based on the date the report is run.

→ You must enter all lease payment series for the contract, even if the lease is being entered into FPMT retroactively. OFM needs all of the payments to accurately calculate cash flow.

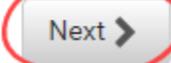
### Lease Payments

| Payment Name | Payment Series Number | Details   | Delete  |
|--------------|-----------------------|---|---|
| Base Rent-1  | 1                     |  |  |

[Add New Lease Payment](#)

→ If this leased facility is in scope for the Six-Year Plan, continue to the next step below, where you can add/update your workstation and occupancy data.

→ If you **do not** need to make any changes to your existing space(s) OR add a new space or lease option, **Click**  until you reach the [Data Review](#) section.



[Cancel All Changes](#)

### Lease Spaces – Existing Spaces

1. If you need to make changes to your existing space(s), Click 

→ You will see all Active spaces currently associated with the lease contract you are renewing.

2. Click the Details  icon to edit an existing space.

3. **Edit** the existing space data

→ You are able to add/update your required Six-Year Facilities Plan workstation and occupancy data here. Enter the following information:

- Number of offices
- Number of workstations
- Number of mobile benches
- Number of touchdown spaces
- Number of resident users
- Number of internally mobile users
- Number of externally mobile users

→ Click the  button next to each field name for a definition of each term.

→ If mobile bench, touchdown space or internally/externally mobile user data is not available, leave those fields blank.

4. Click **SAVE CHANGES**

#### Lease Payments

| Payment Name  | Payment Series Number | Details   | Delete  |
|---------------|-----------------------|---|---|
| Base Rent - 1 | 1                     |  |  |

[Add New Lease Payment](#)

< Previous   Next >   Cancel All Changes

#### Existing Lease Spaces

| Space Name | Space ID | Details   |
|------------|----------|---|
| 0001       | 0001     |  |

#### New Lease Spaces

No new lease spaces found

[Add New Space](#)

#### Edit Space Details

Name

Description

Unique Facility ID

Lease Number 

Space ID 

Receivable Lease Number 

Tenant 

Other Tenant 

**SAVE CHANGES**   Cancel Changes

**Note:** If you're updating the square footage, make sure the total space square feet matches the square footage in the Lease Contract table.

→ You will receive an error message when you click Next if the square footage does not match.

**Errors**

- The square footage of all spaces associated with a lease contract cannot exceed the lease contract square feet. The lease contract square feet is currently 100 and the total associated space square feet is 150.

→ If you **do not** need to add additional spaces but do need to add a [Lease Option](#), click



→ If you **do not** need to add additional spaces or add a lease option, **Click**  until you reach the [Data Review](#) section.



**Lease Spaces – New Spaces**

1. To add an additional space, **Click** Add New Space.

| Existing Lease Spaces |          |   |
|-----------------------|----------|---|
| Space Name            | Space ID | Details   |
| 0001                  | 0001     |  |

| New Lease Spaces              |
|-------------------------------|
| No new lease spaces found     |
| <a href="#">Add New Space</a> |

**2. Enter data – red fields are required**

Field-specific guidance:

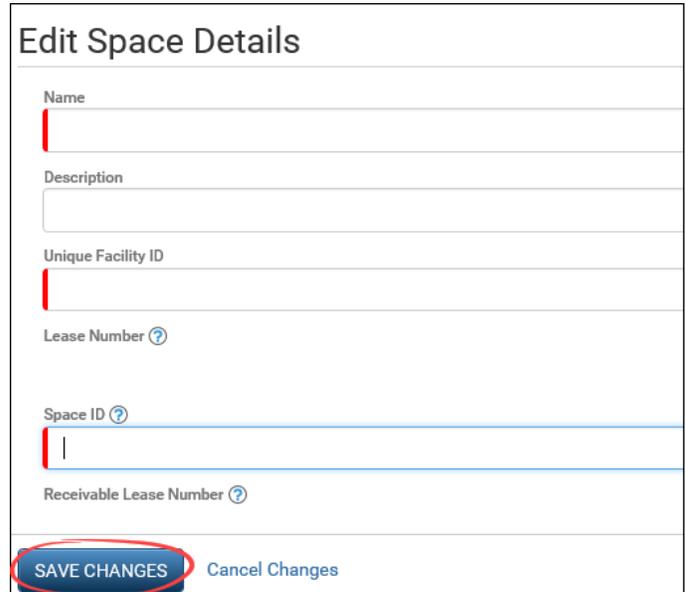
**Name:** Tenant SAAM Acronym – Space ID

Example: DSHS - 0001

**Unique Facility ID:** You must enter the UFI. You can locate the UFI in the existing space table.

**Space ID:** A unique number to identify the space.

Example: 0001



**Note on square footage:** The sum of all Space square feet cannot exceed the total Lease Contract square feet.

**Square Feet Measurement Type:** Dropdown menu

→ Refer to the [Facility Square Footage Measurement Guidelines](#) for more information.

**Primary Space Type:** Dropdown menu

→ Refer to the [Property Class & Space Type Categories job aid](#) for more information.

**3. Click SAVE CHANGES.**

→ If the total square footage does not add up properly or if the UFI does not match, you will receive an error message when you click Next.

**Errors**

- The square footage of all spaces associated with a lease contract cannot exceed the lease contract square feet. The lease contract square feet is currently 12,000 and the total associated space square feet is 13,500.

**Existing Lease Spaces**

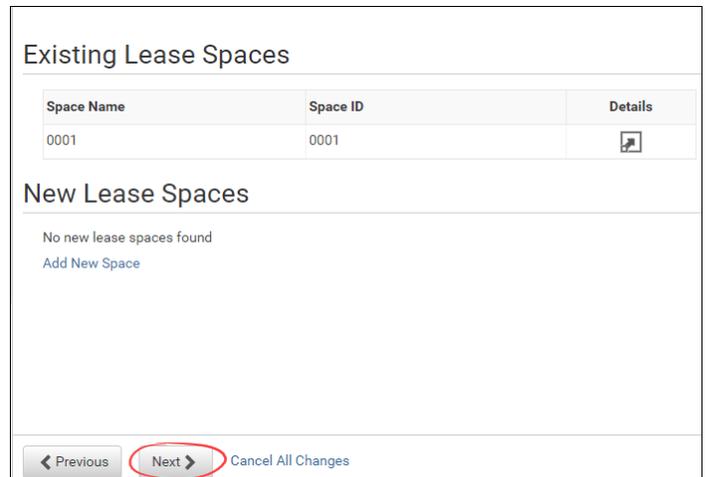
| Space Name | Space ID | Details   |
|------------|----------|---|
| 0002       | 0002     |  |
| New space  | 0003     |  |

→ If you **do not** need to add a lease option, click [Next >](#) until you reach the [Data Review](#) section.

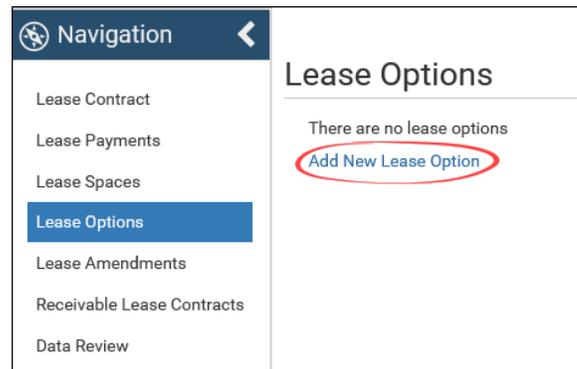


**Add a Lease Option (if applicable)**

**1.** To add a Lease Option, Click [Next >](#)



**2.** Click Add New Lease Option



**3. Enter data – red fields are required**

Field-specific guidance:

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

Example: Cancel - 1

**Option Number:** Options should be numbered in the order they appear in the lease contract

Example: 1, 2, 3

**Option Type:** Dropdown menu – Purchase, Expand, Cancel, Reduce or Renew

**Option Description:** The description should provide a brief summary of the clause in the lease.

Example: Cancellation of the lease is possible with 90 days' notice after year 3

**4. Click SAVE CHANGES**

→The system will ensure the option date is within the parameters of the lease contract.

### Edit Lease Option Details

Name

Description

Lease Number [?](#)

Option Number

Option Type

Option Description

[Cancel Changes](#)

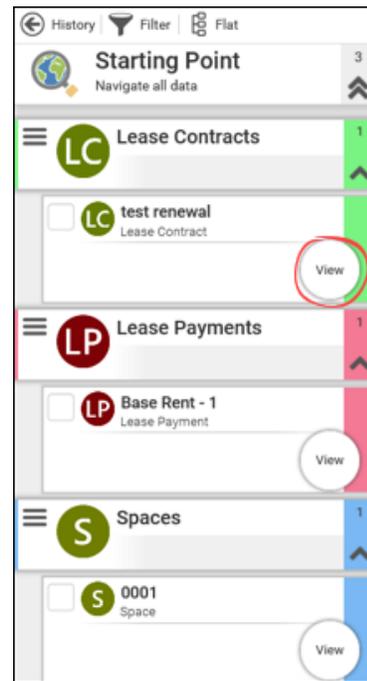
**Review Your Data**

**1. Click**  **until you reach the Data Review section.**

→Data review is optional but recommended.

[Cancel All Changes](#)

2. Click the  Hierarchy button to change to the  Flat view. You can now see all the tables you have added or edited as part of the renewal process.
3. Click the arrows  on the Starting Point tile to expand all of the tiles below.
4. Click View on each tile to see the data you have entered for the renewal.
5. Review the data for your lease renewal.

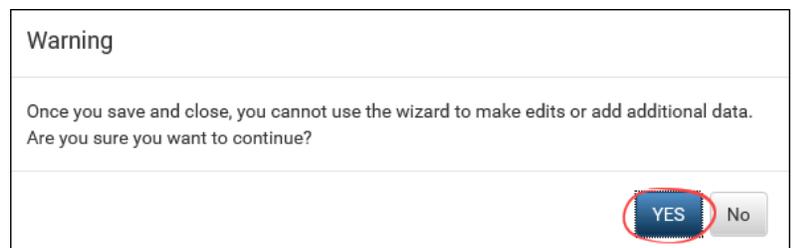


6. Click SAVE AND CLOSE.
7. You will see a warning that lets you know you can't go back into the wizard after saving and closing. If you don't need to make any additional edits, click YES.



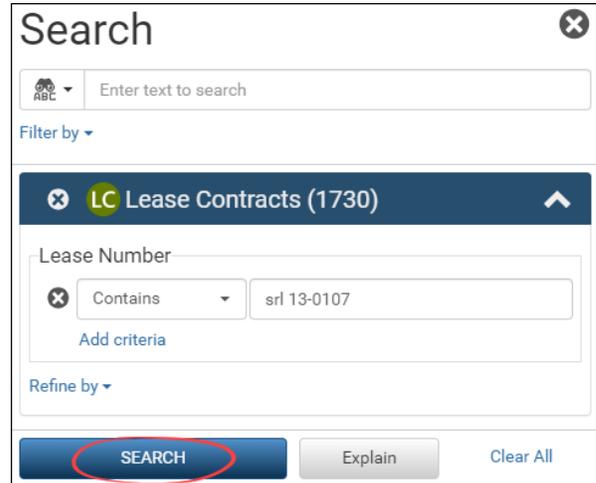
→When you complete the renewal, the window will automatically close. FPMT will still be open in the original window. You will need to refresh your screen in order to see your changes.

→If this is an in-scope facility for the Six-Year Plan, continue to the next step below.

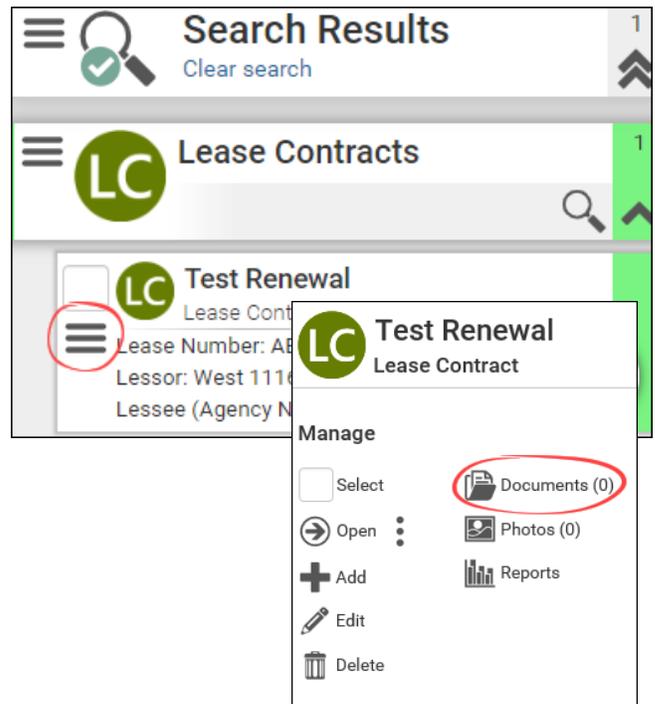


**Attach Copy of New Lease Contract**

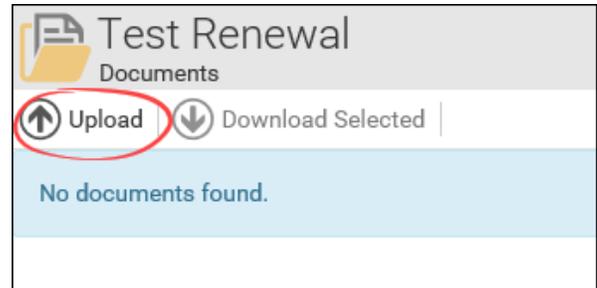
1. Navigate to the new Lease Contract
  - A. Click the  Search button on the data explorer toolbar
  - Your filters will remain in place from your first search
  - B. Remove the old lease number and enter the new one
  - C. Click the  button



2. Click the  menu button on the new Lease Contract tile
3. Click Documents
  - The document manager will open in a new window.



4. Click the  Upload button



5. Browse for or drag and drop the file(s)

6. Click Close

