



Master Lease and Receivable Lease Renewal Wizard – Overview

This job aid provides step-by-step instructions for renewing a master lease with an associated receivable lease. FPMT’s new renewal wizard 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 and receivable lease tables to inactive, and (d) automatically updating the lease number in the leased facility and receivable leased facility tables.

- ✓ 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.
✓ When you renew a master lease, you will need to renew the associated receivable lease(s) at the same time, otherwise the receivable lease(s) will automatically become inactive when you save and close the renewal.
✓ Leases should be renewed in the system on or after the new master lease start date.
✓ At a minimum, a master lease and receivable lease renewal must include: 1) a completed lease contract, 2) at least one lease payment, 3) a completed receivable lease contract, and 4) at least one receivable lease payment. You will have the option of editing the existing lease and receivable lease spaces or adding new lease or receivable lease spaces or options. The last step is data review, which is optional but recommended.
✓ To complete this process, you will need a copy of the new master lease contract and receivable lease contract(s) and the expired master 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 master lease number or UFI, you can run the lease contract inventory report from your agency tile.

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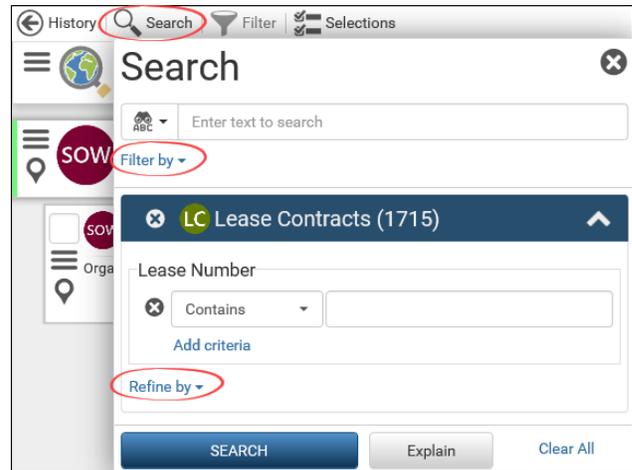
Questions?



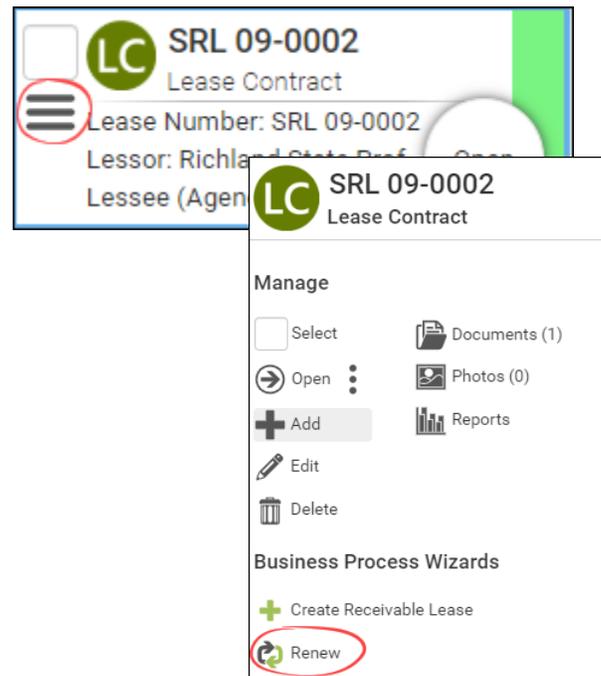
OFM Help Desk
HereToHelp@ofm.wa.gov
360.407.9100

Renew a Master Lease

1. Navigate to the expiring Lease Contract.
 - A. Click the  Search button on the data explorer toolbar
 - B. Click  and choose **Lease Contracts** from the dropdown menu
 - C. Click  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
 - 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 Master 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

Lease Contract

Name

Description

Lease Number

Lessor

Lessee (Agency Name)

Lease Type

→ 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

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 [Next >](#)

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

Description

Lease Number

Lessor [?](#)
Richland State Professional Building LLC

Lessee (Agency Name) [?](#)
Department of Children, Youth, and Families - 307

Lease Type
Lease - A contractual obligation for all or part of a property. Th

[< Previous](#) [Next >](#) [Cancel All Changes](#)

2. Click Add New Lease Payment



Lease Renewal
Renew an expired lease

⌕
Navigation
<

- Lease Contract
- Lease Payments
- Lease Spaces
- Lease Options
- Lease Amendments
- Receivable Lease Contracts
- Data Review

Lease Payments

There are no lease payments

[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

Edit Lease Payment Details

Name *

Description

Lease Number ?

Payment Series Number *

Payment Frequency *

Payment Type *

Payment Amount *

Payment Start Date *

[SAVE CHANGES](#) [Cancel Changes](#)

➔ 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.

➔ If you navigate away from the lease payment table before saving, you will receive an error.

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.

Errors

- One lease payment is required.

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, click  and continue to the step below, where you can add/update your workstation and occupancy data.

→ If you **do not** need to edit/add a space but do need to add a [Lease Option](#), click  twice.

→ If you **do not** need to make any changes to your existing space(s) OR add a new space or lease option, **Click**  three times to skip ahead to [Receivable Lease Contracts](#).



Lease Spaces – Existing Spaces

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

1. **Click** the Details  icon to edit an existing space.

Existing Lease Spaces

Space Name	Space ID	Details
0001	0001	

New Lease Spaces

No new lease spaces found

Add New Space

2. Edit the existing space data

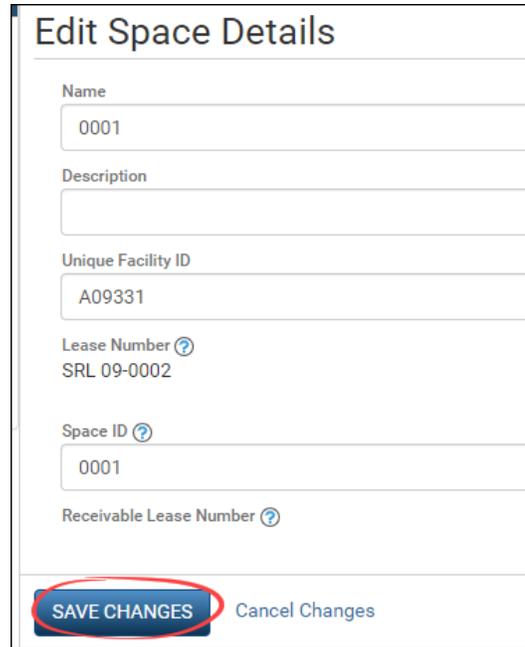
→ You are able to add/update your required Six-Year Facilities Plan workstation and occupancy data here. Enter the following information:

- 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 and internally/externally mobile user data is not available, leave those fields blank.

3. Click SAVE CHANGES



Edit Space Details

Name: 0001

Description:

Unique Facility ID: A09331

Lease Number : SRL 09-0002

Space ID : 0001

Receivable Lease Number 

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.

Existing Lease Spaces

Space Name	Space ID	Details
0001	0001	

→ To add a [Lease Option](#), click  twice.

→ If you **do not** need to add additional spaces or add a lease option, **Click**  three times to skip ahead to [Receivable Lease Contracts](#).



← Previous **Next** → Cancel All Changes

Lease Spaces – New Spaces

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

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

Field-specific guidance:

Name: Tenant SAAM Acronym – Space ID

Example: DCYF - 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 an error message when you click next.

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	<input type="text"/>
Description	<input type="text"/>
Unique Facility ID	<input type="text"/>
Lease Number ?	<input type="text"/>
Space ID ?	<input type="text"/>
Receivable Lease Number ?	<input type="text"/>
SAVE CHANGES	Cancel Changes

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

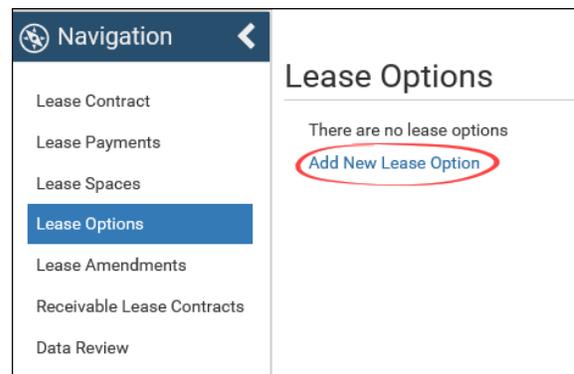
Space Name	Space ID	Details
0002	0002	
New space	0003	

→ If you **do not** need to add a lease option, click [Next >](#) twice to skip ahead to [Receivable Lease Contracts](#).



Add a Lease Option

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

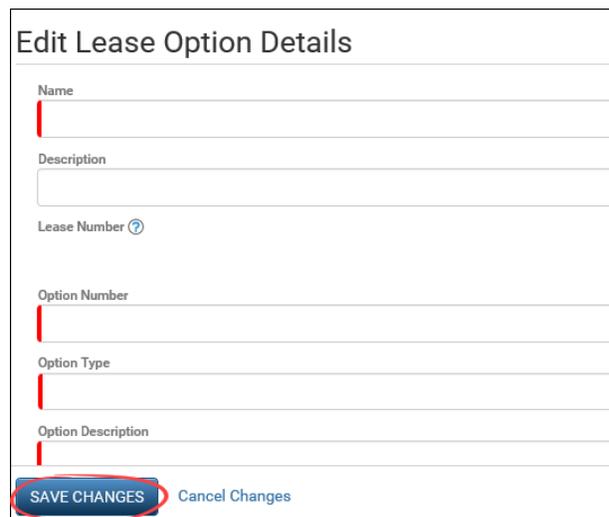
Option Number: Options should be numbered in the order they appear in the lease contract

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

→ Click [Next >](#) twice to skip lease amendments



Renew the Receivable Lease Contract(s)

→ Receivable leases must be renewed at the same time as the master lease, otherwise the system will automatically inactivate them.

1. Click Renew

Existing Receivable Lease Contracts

Receivable lease contracts that are not renewed will be deactivated.

Receivable Lease Name	Receivable Lease Number	Renew
SSL 09-0002	SSL 09-0002	<input type="button" value="Renew"/>

Renewed Receivable Lease Contracts

No new receivable lease contracts found

2. Enter data – red fields are required

- Name (use the receivable lease number)

Note: Receivable lease numbers must be unique. They cannot be used for more than one record.

- Receivable Lease Number
- Receivable Lease Executed Date
- Receivable Lease Start Date
- Receivable Lease End Date

3. Click

Edit Receivable Lease Contract Details

Name

Description

Lease Number ?
SRL 09-0002

Receivable Lease Number ?

Lessor (Agency Name) ?
Department of Children, Youth, and Families - 307

Lessee ?
Department of Social and Health Services - 300

Unable to move to next screen

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

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

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

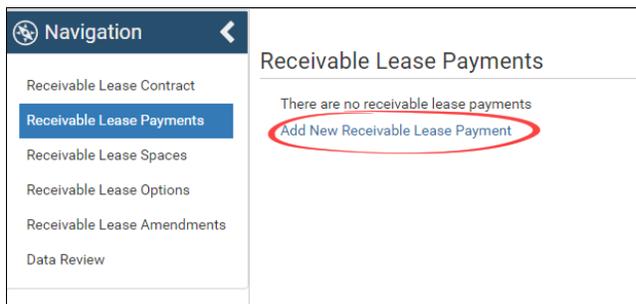
Add a Receivable Lease Payment

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

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



2. **Click** Add New Receivable 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



Edit Receivable Lease Payment Details

Name

Description

Receivable Lease Number

Payment Series Number

Payment Frequency

Payment Type

SAVE CHANGES Cancel Changes

- The receivable lease payment table features the following validation checks:
- All required fields must be completed.
 - The receivable lease payment start and end dates must fall within the parameters of the receivable lease start and end dates.

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

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

→ Once the receivable 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 receivable lease payment series. All payments can have an Active status, as reports pull data based on the date the report is run.

→ To edit an existing receivable lease space or add a new one, **click** 

→ To add a [Receivable Lease Option](#), **click**  twice.

→ If you **do not** need to make any changes to your existing space(s) OR add a new space or receivable lease option, **click**  four times to skip ahead to [Data Review](#).

Errors

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

Errors

- One receivable lease payment is required.

Receivable Lease Payments

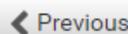
There are no receivable lease payments

[Add New Receivable Lease Payment](#)

Receivable Lease Payments

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

[Add New Receivable Lease Payment](#)





[Cancel All Changes](#)

Receivable Lease Spaces – Existing Spaces

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

1. **Click** the Details  icon to edit an existing space.

Note: If this is an in-scope facility, workstation and occupancy data is required; however, it is the tenant agency’s responsibility to enter this data. Notify the tenant agency when the receivable lease has been renewed so they can review and update their data as necessary.

2. **Edit** the existing space data

3. **Click** SAVE CHANGES

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

→ You will receive an error message when you click Next if the total space square footage is greater than the receivable lease contract square footage.

→ To add a [Receivable Lease Option](#), click 

→ If you **do not** need to add additional spaces or add a receivable lease option, click  three times to skip ahead to [Data Review](#).

Existing Receivable Lease Spaces

Space Name	Space ID	Details
DSHS - 0001	0001	

Edit Space Details

Name
DSHS - 0001

Description

Unique Facility ID
A09331

Lease Number 

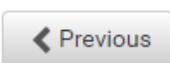
Space ID 
0001

Receivable Lease Number 
SSL 09-0002

SAVE CHANGES Cancel Changes

Errors

- The square footage of all spaces associated with a receivable lease contract cannot exceed the receivable lease contract square feet. The receivable lease contract square feet is currently 1,604 and the total associated space square feet is 1,700.

  Cancel All Changes

Receivable Lease Spaces – New Spaces

1. Click Add New Space
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 Receivable 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.

Edit Space Details

Name

Description

Unique Facility ID

Lease Number ?

Space ID ?

Receivable Lease Number ?

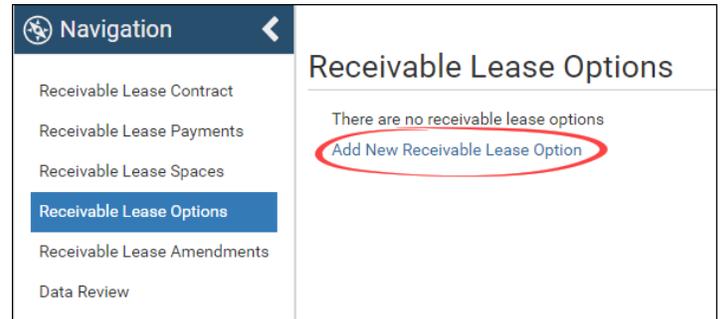
SAVE CHANGES Cancel Changes

→ To add a [Receivable Lease Option](#), click

→ If you **do not** need to add a receivable lease option, **click** three times to skip ahead to [Data Review](#).

Add a Receivable Lease Option

1. Click Add New Receivable Lease Option



2. 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

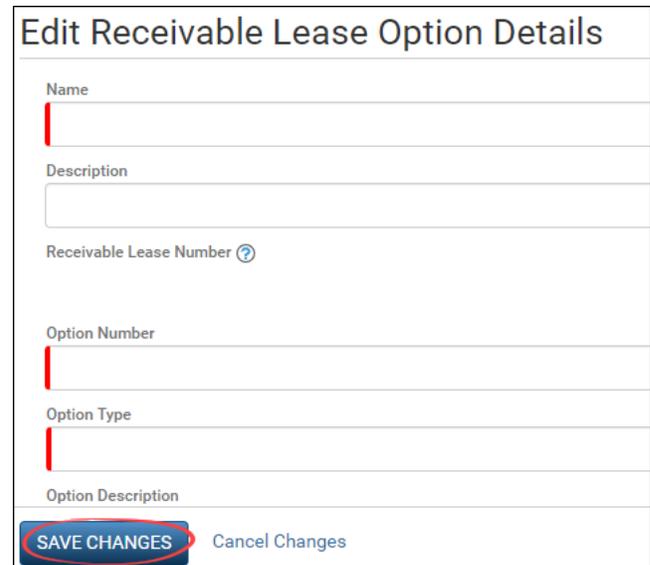
Option Type: Dropdown menu – Purchase, Expand, Cancel, Reduce or Renew

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

3. Click SAVE CHANGES

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

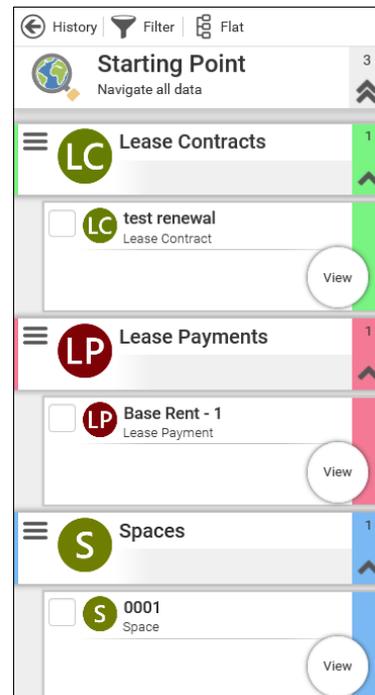


→Click twice to review your data



Review Your Data

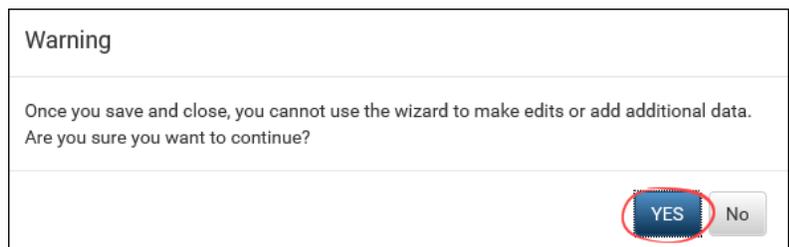
1. Click the  Hierarchy button to change to the  Flat view. You can now see all the tables you have added or edited as part of the renewal process.
2. Click the arrows  on the Starting Point tile to expand all of the tiles below.
3. Click View on each tile to see the data you have entered for the renewal.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



5. Click SAVE AND CLOSE.
6. 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 Contracts

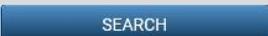
Note: You will need to attach a copy of both the master lease contract and the receivable lease contract.

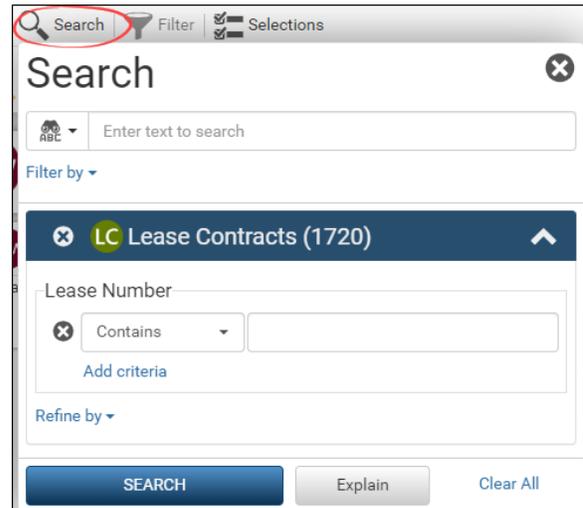
1. Navigate to the new master lease contract tile

A. Click  Search

→ Your filters will remain in place from your original search

B. Remove the old master lease number and enter the new one

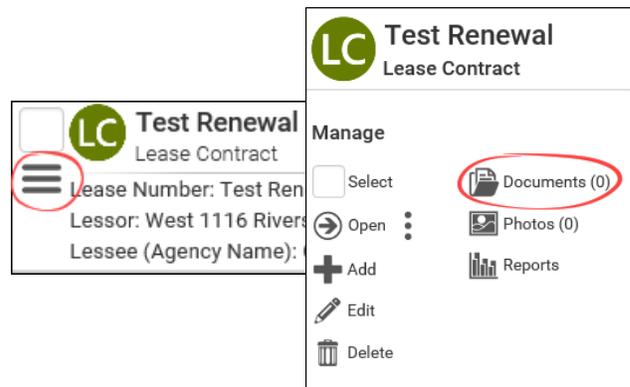
C. Click 



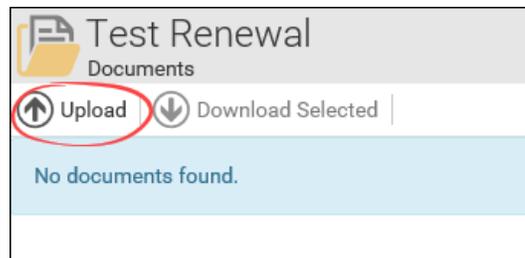
2. Click the  menu button on the new master Lease Contract tile

3. Click Documents

→ The document manager will open in a new window

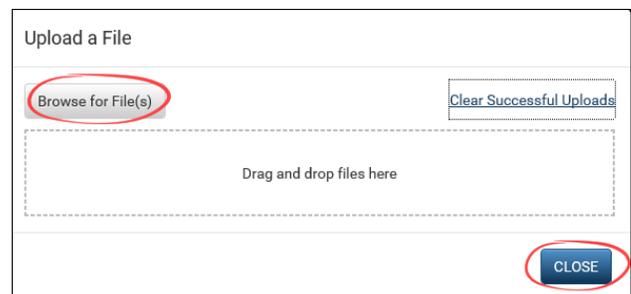


4. Click the  Upload button

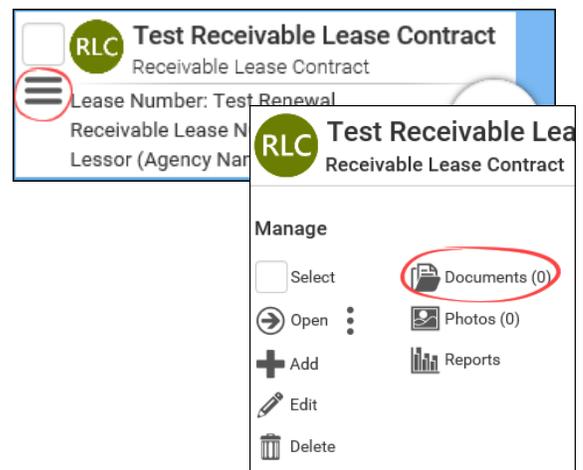
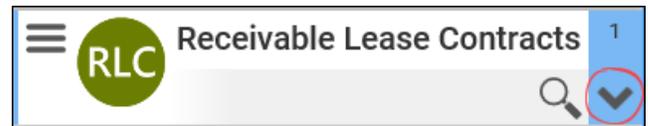
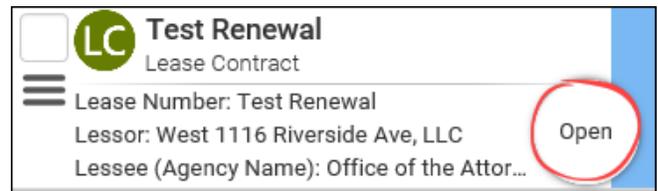


5. Browse for or drag and drop the file(s)

6. Click Close



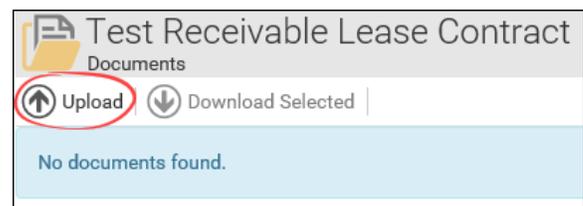
7. Click Open on the new master Lease Contract tile
8. Expand the Receivable Lease Contracts tile group to see the new Receivable Lease Contract tile
9. Click the  menu button on the new Receivable Lease Contract tile



10. Click Documents

→ The document manager will open in a new window

11. Click the  Upload button



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

13. Click Close

