Creating a new leased facility in FPMT a two-stage process involving two wizards. This job aid includes instructions for both wizards.

FPMT has been expanded to meet new Governmental Accounting Standards Board (GASB) requirements. In addition to new functionality, system updates include new user roles as well as changes to existing business processes. Refer to the What's New with FPMT job aid for a high-level overview of system updates, including changes to table names and user role permissions.

## Contents

Overview

Which FPMT user roles can create a new leased facility?	• Creating a new leased facility is a two-step process:
	    o **Step one**: The leased facility creation wizard is completed by users with the FPMT Facilities role. Users must have edit rights.
	    o **Step two**: Users with the FPMT Accounting role complete the Lease Review wizard, which collects the majority of the financial data. Users must have edit rights.
	• Per agency discretion, an individual can be assigned both the Accounting and Facilities user roles.

What are the consequences of not completing step two (Lease Review wizard)?	• The leased facility is not a valid record and will not appear on reports. • For leases that are in scope for GASB, FPMT will not be able to send transactions to AFRS.
Where do I access the Create Leased Facility wizard and Lease Review wizard?	• The Create Leased Facility wizard and Lease Review wizard are both accessed via the menu button on the agency tile.
When should I enter a new leased facility?	• New leased facilities should be entered into FPMT no earlier than one month, and no later than two weeks, prior to the lease contract start date.

What information do I need to create a new leased facility?	• A copy of the lease contract.
	• A floor plan that shows the total square footage.
	• If you are creating a new facility:
	    o Parcel Number
	    o Legislative District

What is the difference between creating a new facility and creating a new leased facility?	• Facilities and leased facilities are two separate tables in FPMT. A leased facility table must be associated with a facility. • The facility table captures static information about the building, such as the address, map coordinates, parcel number etc. The leased facility captures information about the tenant agency and the condition of the leased space. • As part of the wizard process, you will have the option to create a new facility or link to an existing facility. • Always search FPMT before creating a new facility to ensure that the building 1) is not occupied by another agency or 2) was not previously obligated to the state.
If I need to create a new facility, how do I get the unique facility identifier (UFI) into HRMS?	• Make sure to select "yes" for the HRMS field in the facility table. • The UFI will be uploaded to HRMS after the new facility record has been reviewed for accuracy and approved by OFM. • Refer to the UFI Frequently Asked Questions for more information.
Why should I use the wizard?	• The wizard simplifies the leased facility creation process by guiding you through each step and reducing manual activity in the system. • The wizard also includes business rules, or validation checks, to prevent incomplete data and common data entry errors.

Wizard basics:
- The wizard opens in a new window, which will close when you complete the leased facility creation process. Once the window closes, you will need to refresh your original FPMT window to see all of the changes.
- Once you Save and Close, you cannot go back into the wizard.
- Make sure to allow enough time to complete the wizard process in one sitting. If you time out during the process, you will lose your data.
- You navigate through the wizard by clicking the Next or Previous buttons.

Search for the Facility

Always search for the facility to ensure it's not already part of the inventory.

1. **Open** the Data Explorer module.
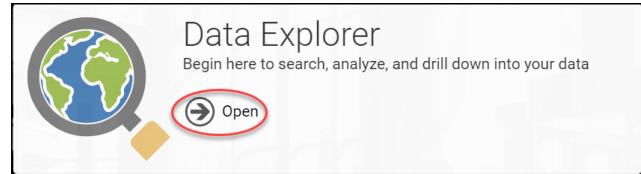
2. **Select** the 🔍 Search button on the data explorer tool bar.

3. **Select** Filter by ▾ and choose **Facilities**.

4. **Select** Refine by ▾ and choose **Primary Address**.

5. **Enter** the street address.

   ➔ Be aware that the system will not recognize abbreviations and full street names as the same word (e.g., St vs. Street).

   ➔ Start with the abbreviation. If you don't find the facility, repeat the search with the full name.

6. **Select** SEARCH
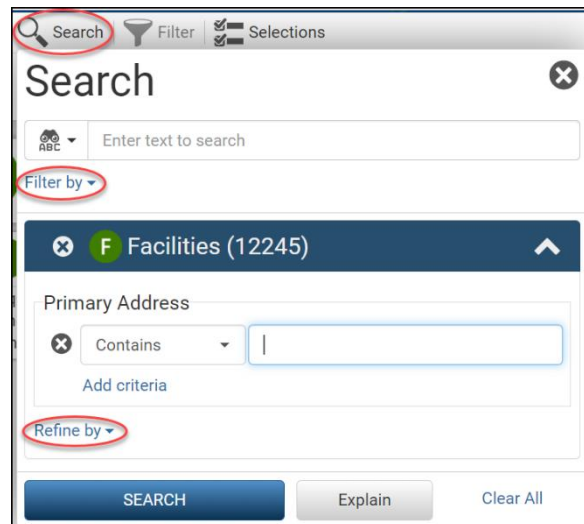
➔ If the facility already exists in the inventory, you will link to it as part of the wizard process instead of creating a new location.
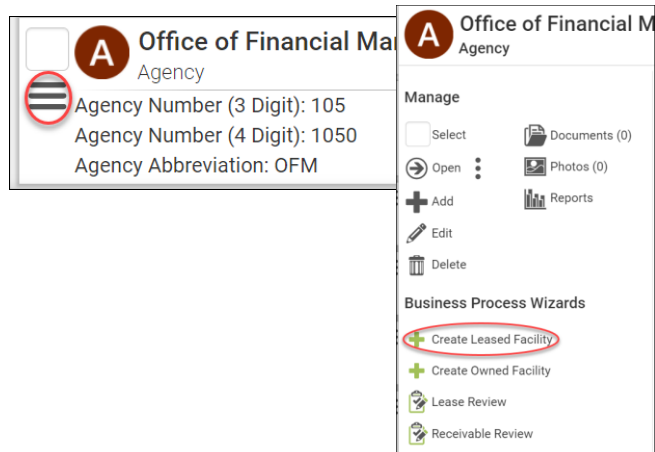
Launch the Leased Facility Creation Wizard

Navigate to the agency tile and launch the leased facility creation wizard.

1. **Select** the 🔍 Search button on the data explorer tool bar.

   ➔ If you are doing this search immediately after the above search, select Clear All before continuing on to step 2.

2. **Select** Filter by ▾ and choose **Agencies**.

3. **Select** Refine by ▾ and choose **Agency Abbreviation**.

4. **Enter** the abbreviation.

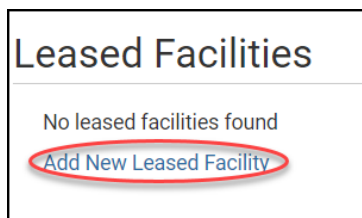   ➔ These are SAAM acronyms.

5. **Select** SEARCH
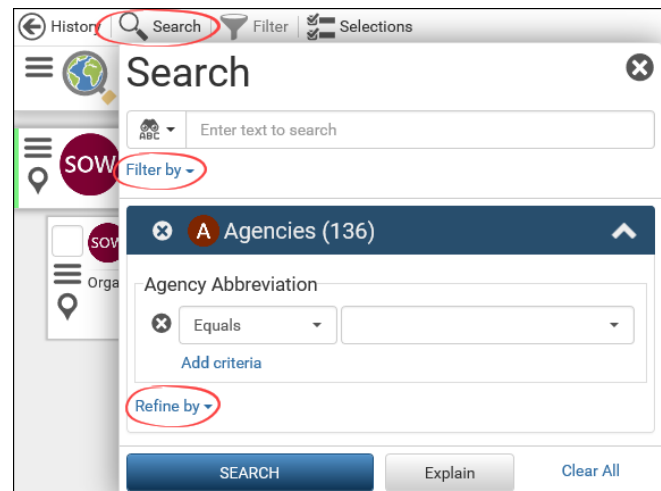
2. **Select** the ☰ menu button on the agency tile.
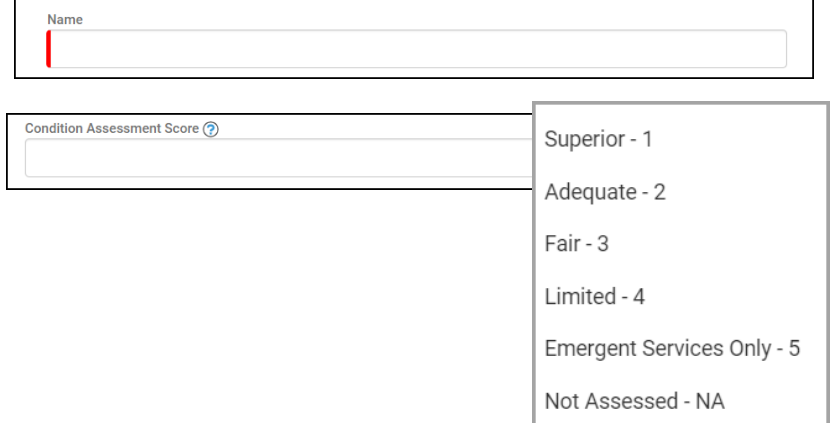
3. **Select** Create Leased Facility.

Add a New Leased Facility

1. **Select** Add New Leased Facility

2. **Enter** agency data. Red fields are system required. Other required fields are noted in this job aid.

   ➔Additional guidance is available by selecting the information icon ⑦ next to the field name.

   ▪ Name

     ➔Agency SAAM acronym – Agency common name

     (e.g., ES – Yakima Worksource)

   ▪ Condition Assessment Score

     ➔This is a required field for all facilities (1-5 or NA).
     ➔The Condition Matrix table, which is available later in the wizard, is an optional way to populate this score.

     ➔If you skip this field and the matrix, you will receive an error.

   ▪ Six-Year Facilities Plan

     ➔Ensure this field is marked "yes" if this leased facility is in scope for the Six-Year Facilities Plan. Otherwise, select "no."
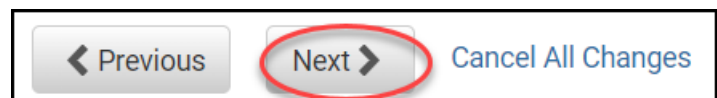
3. **Select** Next >

Facility – Add New or Link to Existing

➔ If you located an existing facility in your initial search, choose **Select an existing facility**.

➔ If you did not find an existing facility, choose Create a new facility.

Link to an Existing Facility

1. **Select** the 🔍 Search button to locate an existing facility.

2. **Enter** the primary address in the search box using quotation marks.

   ➔ You can also use the UFI.

3. **Select** SEARCH

4. **Select** the checkbox next to the facility.
5. **Select** DONE

➜Your new leased facility is now associated with an existing facility record.

➜If you need to make a change, you can either **Select a different existing facility** or **Create a new facility**.

Facility

Facility
1500 Jefferson St SE

Select a different existing facility
or
Create a new facility

‹ Previous   Next ›   Cancel Changes

➜Once you have the correct facility, select Next ›

➜Click/tap here to skip the new facility instructions and continue on to adding a new space.

Add a New Facility

1. **Enter** agency data. Red fields are required.

   ➜Additional guidance is available by selecting the information icon ⓘ

   - Name

     ➜Use the primary address. If the facility address is not unique, include a building number.
     (e.g., 1313 N 13th Ave – BLDG 1W165000)

   - Primary address

     ➜This is the legal address. Refer to USPS Addressing Standards.

     ➜The system will require a secondary address if a facility with the same primary address already exists.

     ➜The system will only catch duplicate addresses if they are entered exactly the same. If you are entering multiple facilities with the same primary address, make sure to use the same formatting.

     (e.g., Jefferson St)

Edit Facility Details

Name

Description

Primary Address ⓘ

- Secondary Address
  ➔A secondary designator, such as a building number or name.
- Alternative Address
  ➔ Only populate this field if the facility has an address other than the legal address, for example a different mailing address.

Secondary Address ⑦

Alternative Address ⑦

- City – Out of State
  ➔ If the facility is located outside of Washington State, select Out of State at the bottom of the dropdown list on the City, County and Legislative District fields. Enter the city in the City – Out of State field.

City

City - Out of State ⑦

County

Zip Code

Zip +4

State

Country

- Property Tax Parcel or Account Number
  ➔This information can be found on the county assessor's website.
  ➔If there is no parcel number for this facility or it is located out of state, enter N/A.
- Latitude & Longitude (required)
  ➔FPMT will automatically populate this data after you geocode the facility.
- Legislative District
  ➔ Based on location of the facility. You can locate the legislative district on the Legislature's website.
- Registered Historic Property
  ➔If unsure, refer to the Department of Archaeology and Historic Preservation for more information
- Essential Public Facility
  ➔Essential public facility refers to public facilities that are typically hard to cite and critical to state government. Refer to WAC 365.196.550, RCW 36.70A.200, RCW 47.06.140 or RCW 71.09.020.

Property Tax Parcel or Account Number ⑦

Latitude ⑦

Longitude ⑦

Legislative District ⑦

Registered Historic Property ⑦

Essential Public Facility ⑦

- Facility Type (Building or Structure) – **only buildings are included in the facilities inventory**

  ➔A building is a facility with at least one wall, a roof and permanent foundation, regardless of occupancy.

  ➔A stucture is a real property improvement constructed on or in the land, which is not a building.

- Property Class

  ➔Auto-populated based on the primary space type with the most square feet in the Space table.

- Surplus

  ➔Select "yes" if the facility is no longer needed by the agency and can be surplused.

Facility Type

Property Class ?

Surplus ?

- Campus

  ➔ Is this facility part of a campus? (Yes/No)

- Campus Identification Number

  ➔As defined in the Energy Star Portfolio Management System. The format should be the agency SAAM number and campus ID (e.g., 405-0123).

- Conditioned Space

  ➔Select Yes if the facility meets the criteria for conditioned space as defined by the Washington State Energy Code. This code defines conditioned space as any facility which has a room or area that is being heated or cooled, containing uninsulated ducts or with a fixed opening directly into adjacent conditioned space.

Campus ?

Campus Identification Number ?

Conditioned Space ?

➔Populate the following fields with the corresponding value from the Energy Star Portfolio Management System.

- Portfolio Management Identification Number
- Parent Portfolio Management Identification Number
- Energy Use Intensity (EUI)

➔Refer to the Department of Commerce's website for more information on Clean Buildings Act compliance criteria.

- Does this facility meet the Clean Buildings Act standard? (Yes/No)

➔Click the information icon ⍰ for electric vehicle charging port definitions.

- Number of Level 2 Charging Ports
- Number of Level 3 Charging Ports
- Number of Publicly Available Charging Ports

Portfolio Management Identification Number ⍰

Parent Portfolio Management Identification Number ⍰

Energy Use Intensity (EUI)

Does this facility meet the Clean Buildings Act standard?

Number of Level 2 Charging Ports ⍰

Number of Level 3 Charging Ports ⍰

Number of Publicly Available Charging Ports ⍰

- Facilities Inventory

  ➔ Select "yes" if the facility is a building with at least one wall, a roof and a permanent foundation, regardless of occupancy.

- HRMS

  ➔ Select "yes" if the facility serves as a duty station for employees.

- OFM Validation Date

  ➔All new facilities are saved in pending approval status. OFM must review key data for accuracy and will change the status of the facility to "approved" and populate the OFM validation date.

Facilities Inventory ⍰

HRMS ⍰

Comment

OFM Validation Date ⍰

2. **Select** Edit Geometry to geocode your facility (place a point on the map).
   ➔You must geocode the facility or manually populate the coordinates.
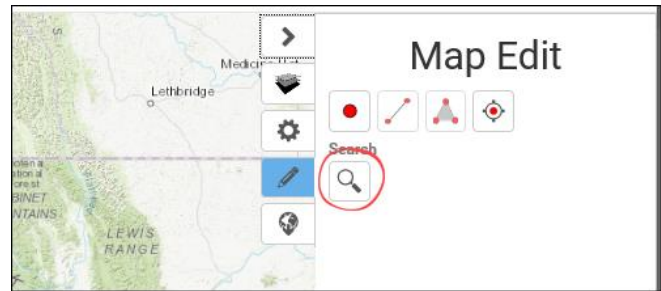   ➔You will receive an error if you skip this step.

Edit Geometry

SAVE CHANGES   Cancel Changes

Errors

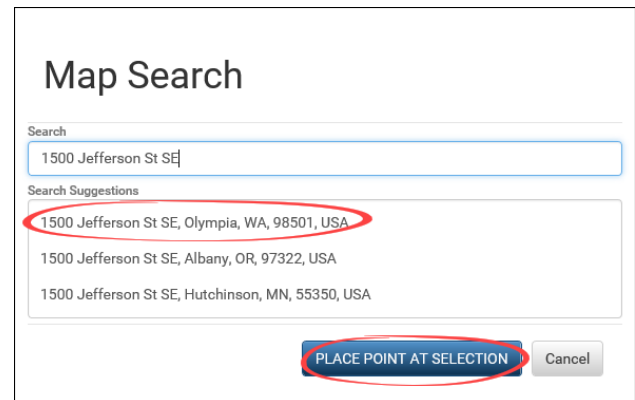- Facility must have Latitude and Longitude or be geocoded.

3. **Select** the search 🔍 button.

4. **Enter** the street address – the system will populate addresses in the dropdown menu.
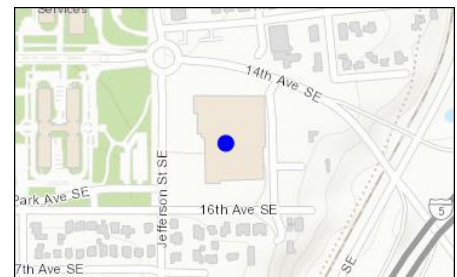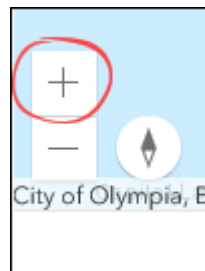5. **Select** the appropriate address.
6. **Select** Place Point at Selection

7. **Select** the ＋ button to zoom in on the map.

➔A dark blue dot will appear at the specified address.
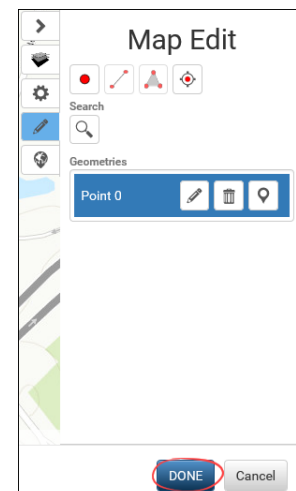

8. If the point is in a road, you will need to move it so it is on the actual facility.
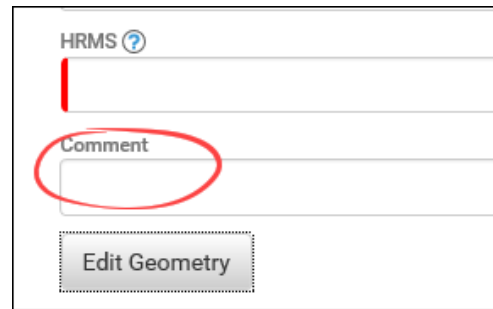   A. **Select** the dot – it will become light blue.
   B. **Move** the dot to the approximate center of the building.
   C. **Click/tap** anywhere on the map to change the dot back to a darker blue.
9. **Select** Done.

➔In the event that a building shape does not exist yet at the address you have entered, do your best to approximate the location and add a comment.
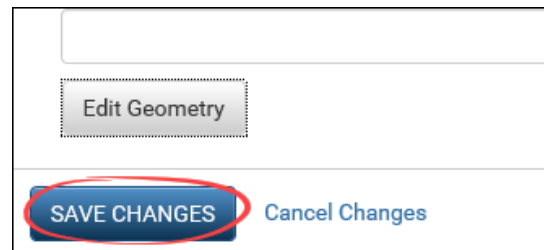
10. Select SAVE CHANGES

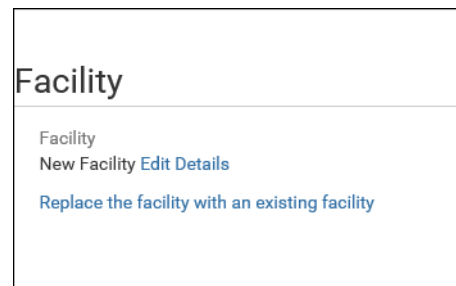➔Your new leased facility is now associated with a new facility record.

➔If you need to make a change, you can either **Edit Details** for your new facility or **Replace the facility with an existing facility**.
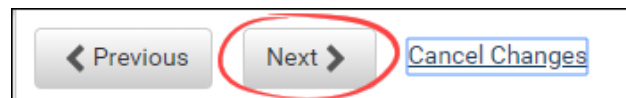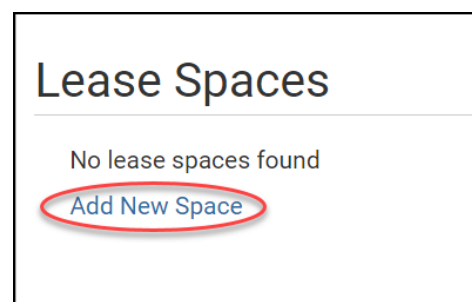
11. Select Next ›

Add a New Space

1. **Select** Add New Space

2. **Enter** agency data. Red fields are required.

➔ Select the information ⓘ icon for additional guidance about fields.

- Name

  ➔ Tenant SAAM Acronym – Space ID (e.g., DSHS – 0001)

- Space ID

  ➔ A unique number to identify the space (e.g., 0001)

- Tenant

Edit Space Details

Name

Description

Space ID ⓘ

Tenant ⓘ

- Square Feet

  ➔ The sum of all space square feet cannot exceed the total square feet in the lease contract.

- Square Feet Measurement Type (dropdown)

- Primary Space Type (dropdown)

 ➔ Refer to the Property Class & Space Type Categories job aid for additional information.

Square Feet ⓘ

Square Feet Measurement Type

Primary Space Type ⓘ

- If part of your new space is available for use by another agency, refer to the Available Space job aid for details on how to populate the additional fields for potential collocation.

  ➔ If Available Space is marked "yes," you must populate the **Annual Full Service Rate per Square Foot** and **Available Occupancy Date** fields.

Available Space ⓘ

No

➔ If this leased facility is in scope for the Six-Year Facilities Plan, you must populate the following additional fields:

- Number of Offices
- Number of Cubicles
- Number of Touchdown Spaces

  ➔ Refer to any unassigned workspace (office, cube, bench etc.) that could be used for hoteling as a touchdown space.

Number of Offices (Required For Six-Year Plan) ⓘ

Number of Cubicles (Required For Six-Year Plan) ⓘ

Number of Touchdown Spaces (Required For Six-Year Plan) ⓘ

- ■ Number of Resident Users
- ■ Number of Externally-Mobile Users
- ■ Number of Fully Remote Users

➔ Select the information ⓘ icon for definitions.

Number of Resident Users (Required For Six-Year Plan) ⓘ

Number of Externally Mobile Users (Required For Six-Year Plan) ⓘ

Number Of Fully Remote Users (Required For Six-Year Plan) ⓘ

3. **Select** SAVE CHANGES

SAVE CHANGES   Cancel Changes

➔ Once the new space is saved, you can update the information by selecting the details icon or delete the space by selecting the trash can.

Lease Spaces

Space Name	Space ID	Details	Delete
Space	001	↗	🗑

Add New Space

4. Navigate to the next needed form.

- ■ To add operating costs, select Next >

    ➔ Operating costs are required for facilities that are in scope for the [Six-Year Facilities Plan](#). Costs only need to be entered during the plan data collection cycle. If this facility is being entered off-cycle (in an odd year, e.g., 2023), you can skip this table and enter operating costs manually the next year.

- ■ To skip operating costs and add a condition matrix, select Next > twice.

    ➔ A condition assessment score is required for all facilities in the inventory. The condition matrix is an optional way to populate that score. Refer to the [condition matrix](#) job aid for more details.

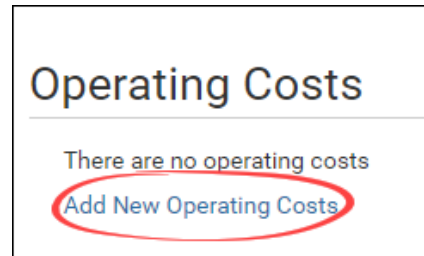- ■ To skip operating costs and condition matrix, select Next > twice and then select SAVE CHANGES.

    ➔ To skip ahead to the lease contract instructions, click/tap [here](#).

‹ Previous   Next ›   Cancel All Changes

‹ Previous   Next ›   SAVE CHANGES   Cancel Changes

Add Operating Costs

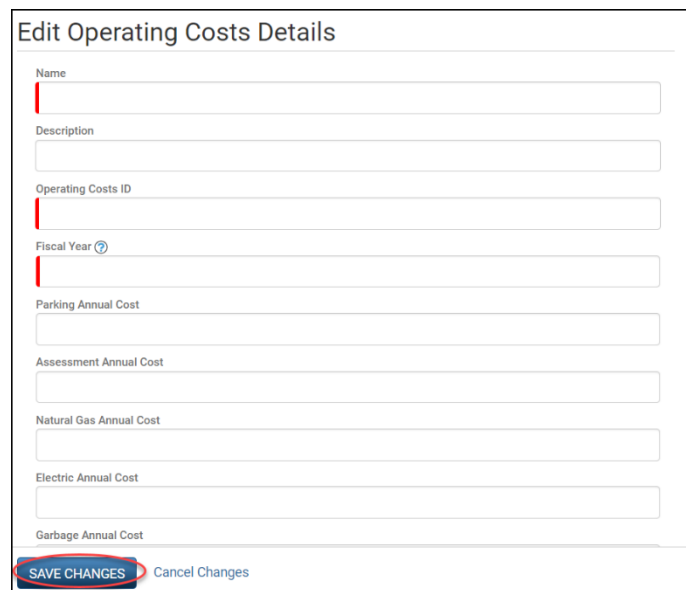1. **Select** Add New Operating Costs

Operating Costs

There are no operating costs

Add New Operating Costs

2. **Enter** data. Red fields are required.
   - Name
     ➜Fiscal year (e.g., FY 2024)
   - Operating Costs ID
     ➜A number to identify the record (e.g., 1)
   - Fiscal Year
     ➜Enter 2024
     ➜It is critical that this field is properly populated. OFM's baseline report pulls data based on this field.
3. **Select** SAVE CHANGES

Edit Operating Costs Details

Name

Description

Operating Costs ID
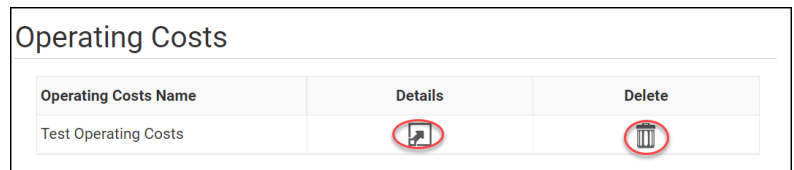
Fiscal Year ⍰

Parking Annual Cost

Assessment Annual Cost

Natural Gas Annual Cost

Electric Annual Cost

Garbage Annual Cost

SAVE CHANGES   Cancel Changes

➜Once the operating costs table is saved, you can update the information by selecting the details icon or delete it by selecting the trash can.

Operating Costs

Operating Costs Name	Details	Delete
Test Operating Costs	⬈	🗑

4. **Navigate** to the next needed form.
   - To add a condition matrix, select Next ›
   - To skip the condition matrix, select Next › and then select SAVE CHANGES.
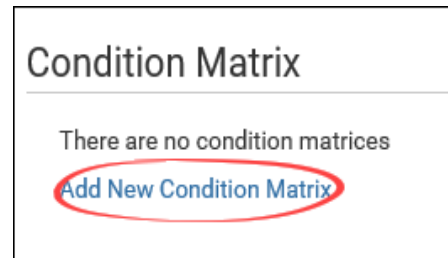   - To skip ahead to the Lease Contract instructions, click/tap here.

‹ Previous   Next ›   Cancel All Changes

‹ Previous   Next ›   SAVE CHANGES   Cancel Changes

Add a Condition Matrix
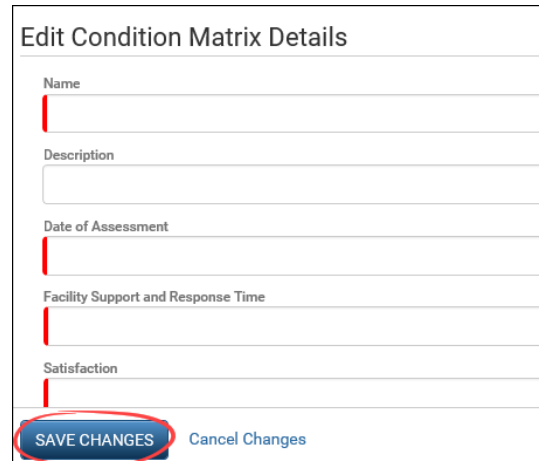
1. **Select** Add New Condition Matrix

Condition Matrix

There are no condition matrices

Add New Condition Matrix

2. **Enter** data. Red fields are required.
   ➜Refer to the Condition Matrix job aid for more information.
3. **Select** SAVE CHANGES

Edit Condition Matrix Details

Name

Description

Date of Assessment

Facility Support and Response Time

Satisfaction

SAVE CHANGES   Cancel Changes

➜Once the condition matrix is saved, you can update the information by selecting the details icon or delete it by selecting the trash can.

Condition Matrix

Condition Matrix Name	Details	Delete
Test Condition Matrix		

4. **Select** SAVE CHANGES

❮ Previous   Next ❯   SAVE CHANGES   Cancel Changes

➜If you need to edit any of the data you have previously entered, select the details icon. To delete all of the data that you have previously entered, select the trash can.

Leased Facilities

Leased Facility Name	Details	Delete
Test Leased Facility		

Add New Leased Facility

5. **Select** Next ❯

❮ Previous   Next ❯   Cancel All Changes

Add a Lease Contract
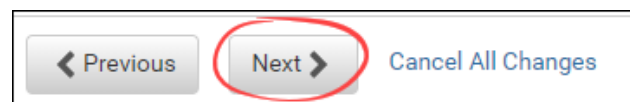
➔The majority of lease contract data will be entered separately via the Lease Review wizard, which is only accessible to users with the Accounting user role and edit rights.

1. **Enter** agency data. Red fields are required.

   ▪ Name

      ➔Use the lease number

   ▪ Lease Number

      ➔Lease numbers must be unique; they cannot be used for more than one record.

   ▪ Is This A Triple Net Lease?
      ➔Defaulted to No. Change to Yes if it's a triple net lease.

Edit Facility Lease Contract Details

Name

Lease Number

Is This A Triple Net Lease? ⑦
No ▾

Lease Primary Address ⑦

Lease Secondary Address ⑦

Lease City ⑦

Triple net lease, triple net, or NNN, is a type of commercial real estate lease where the tenant or lessee pays the full expenses of the property.

   ▪ Lease Square Feet

      ➔Make sure the square feet in your space table matches the square feet in your lease contract.

   ▪ Leased Square Feet Type (dropdown)

   ▪ Lease Start Date

   ▪ Lease End Date

      ➔For long-term leases with no end date (e.g., with the federal government), populate an end date 10 years out from when you enter the lease in the system.

   ▪ Month-To-Month

      ➔Select "yes" if this is a month-to-month lease. If there is no specific end date, enter an end date one year out from the start date.

Leased Square Feet ⑦

Leased Square Feet Type ⑦
▾

Lease Start Date
📅

Lease End Date
📅

Month-To-Month
▾

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2. **Select** Next ›
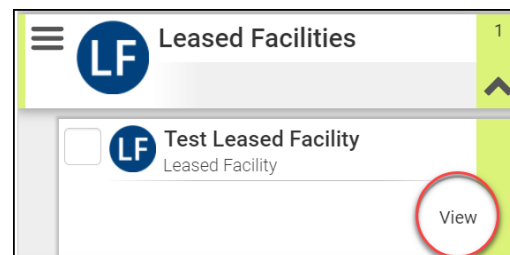
[‹ Previous] [**Next ›**] Cancel All Changes

Review Your Data

1. **Select** the [Hierarchy] button to change to the [Flat] view. You can now see all of the tables you have added or edited as part of the wizard process.

2. **Select** the arrows ⬇ on the Starting Point tile to expand all of the tiles below.
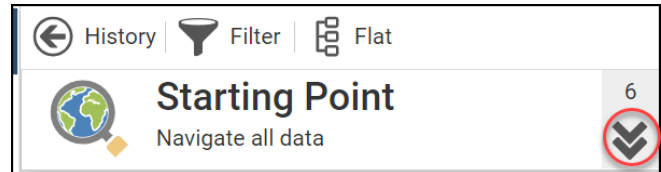
3. **Select** View on each tile to see the data you have entered.

4. **Review** your data.

➔ To edit your data, use the Previous button to navigate back to an earlier screen.
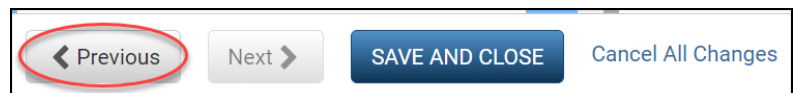
5. **Select** SAVE AND CLOSE to complete the wizard.

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, select YES.

➔ When you complete the wizard, 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.
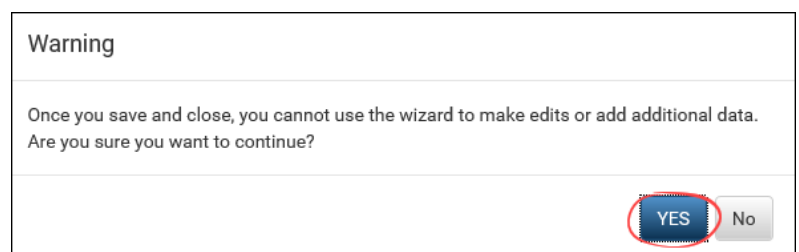
Notify FPMT Accounting User or Continue to Lease Review Wizard

Once the leased facility creation wizard has been completed, the remaining lease contract data will need to be entered separately via the Lease Review wizard (instructions below). Contact your agency's FPMT accounting user to complete this second step unless you have both the Facilities and Accounting user roles.

The new leased facility is not a valid record until the additional financial data has been entered, so it is critical that the second step is completed in a timely manner. Until the remaining financial data is entered, the leased facility will not appear on reports, and FPMT will not be able to send any transactions to AFRS.

## Launch the Lease Review Wizard

The Lease Review wizard displays all of your agency's active lease contracts and gives you the opportunity to update the lease contract table and add lease payments, options, and amendments. You can go back into this wizard as often as necessary. This job aid is focused on steps relevant to the facilities inventory. If you have questions about GASB functionality, contact your OFM Statewide Accounting consultant.

You will need to navigate to the agency tile to access the wizard.

1. **Select** the ☰ menu button on the new lease contract tile.
2. **Select** your agency from the Navigate Up section to open the agency tile.
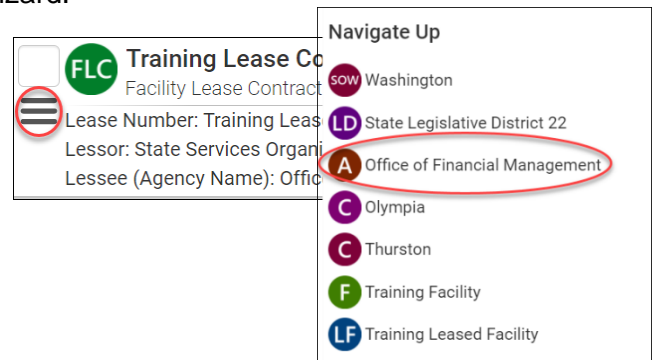
3. **Select** the ☰ menu button on the agency tile.
4. **Select** Lease Review under Business Process Wizards
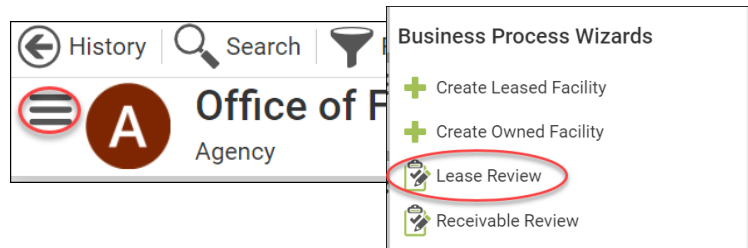
Select Lease Contract to Update

1. **Select** the ⬈ Details icon to open the lease contract data.

   ➔ If your agency has a number of leases, use the search box to narrow your results.

Enter Remaining Lease Contract Data

1. **Enter** agency data. Red fields are system required. Other required fields are noted in this job aid.

   - Lessor
   - Lease Type
     ➔ Dropdown menu
   - Real Estate Authority
     ➔ Dropdown menu
   - Lease Executed Date
     ➔ The date the last party signed the lease
   - Full Service (required)
     ➔ Defaulted to "No" for new leased facilities.
     ➔ Update field to "Yes" if the lease is fully serviced. This will auto-populate most operating cost fields to "lessor paid"
   - Operating Cost Fields
     ➔ Dropdown fields – select lessor or lessee paid. If a cost is not applicable, select N/A.

➔ The following fields only apply to office spaces that are in scope for the Six-Year Facilities Plan.

➔ Required fields in this section have been pre-populated with Unreported for the time being.

➔ If the required fields are changed to Yes, additional fields become required.

   - Was furniture moved to this location?
   - Moving furniture cost, if applicable
   - New furniture cost, if applicable
   - If new furniture was purchased, why wasn't existing furniture used?
   - Were staff moved to this location?
   - Staff moving cost, if applicable
   - Are there tenant improvement (TI) costs?

Edit Facility Lease Contract Details

Name
DEL WA-18318

Description

Lease Number
DEL WA-18318

Lessor ⑦

Lease Type ▼

Is This A Triple Net Lease? ⑦
No ▼

Real Estate Authority ⑦ ▼

Lease Executed Date ⑦ 📅

Full Service ⑦
No ▼

Assessment ▼

Bulbs/Tubes ▼

Natural Gas ▼

Was Furniture Moved To This Location?
Unreported ▼

Moving Furniture Cost, If Applicable

New Furniture Cost, If Applicable

If New Furniture Was Purchased, Why Wasn't Existing Furniture Used?

Were Staff Moved To This Location?
Unreported ▼

Staff Moving Cost, If Applicable

Are There Tenant Improvement (TI) Costs?
Unreported ▼

Create Leased Facility
Need help? Contact the OFM Help Desk HereToHelp@ofm.wa.gov 360.407.9100

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➔ If any cost fields are populated, the associated fields become required.

- Construction – Cost
- Construction – How are tenant improvements being paid for?
- Common Area Improvement – Cost
- Common Area Improvement – How are tenant improvements being paid for?
- Exterior Improvement – Cost
- Exterior Improvement – How are tenant improvements being paid for?
- Fire and Security Improvement – Cost
- Fire and Security Improvement – How are tenant improvements being paid for?
- Deferred Maintenance – Cost
- Deferred Maintenance – How are tenant improvements being paid for?
- Other Tenant Improvement
- Other – Cost
- Other – How are tenant improvements being paid for?
- If tenant improvement costs are not one-time costs, how much is added to the cost/SF?

Construction - Cost

Construction - How Are Tenant Improvements Being Paid For?

Common Area Improvement - Cost ⑦

Common Area Improvement - How Are Tenant Improvements Being Paid For? ⑦

Exterior Improvement - Cost ⑦

Exterior Improvement - How Are Tenant Improvements Being Paid For? ⑦

Fire And Security Improvement - Cost

Fire And Security Improvement - How Are Tenant Improvements Being Paid For?

Deferred Maintenance - Cost

Deferred Maintenance - How Are Tenant Improvements Being Paid For?

Other Tenant Improvement

Other - Cost

Other - How Are Tenant Improvements Being Paid For?

If Tenant Improvement Costs Are Not One-Time Costs, How Much Is Added To The Cost/Sf?

- Capitalized
  ➔ Will this lease contract be capitalized? If FPMT will send accounting entries to AFRS, the answer is always "Yes."

Capitalized ⑦

2. Select **Next >**

Add a Lease Payment

1. **Select** Add New Lease Payment
2. **Enter** agency data. Red fields are system required.
   - Name
     ➔ Payment Type – Series Number (e.g., Base Rent – 1)
   - Payment Series Number
     ➔ Use sequential numbers for the series (e.g., 1, 2, 3)
   - Payment Frequency
     ➔ Dropdown Menu
   - Payment Type
     ➔ Dropdown Menu
   - Payment Amount
   - Payment Start Date
   - Payment End Date
3. **Select** SAVE CHANGES

You now have the option to edit your payment by selecting the Details icon or delete by selecting the trash can.

Repeat this process if there is more than one payment series.

➔ You must enter a series for each time the rent amount changes.

➔ If there is no base rent, or if you are receiving free rent for a portion of the lease term, enter a payment for $0.

➔ If there is amortized tenant improvement costs associated with this leased facility, you would enter those costs as a lease payment series.

4. **Select** Next >

Lease Payments

There are no lease payments
Add New Lease Payment

Edit Lease Payment Details

Name

Description

Payment Series Number

Payment Frequency

Payment Type

Payment Amount

Index Rate

Payment Start Date

Payment End Date

Day Payment Initiated

SAVE CHANGES   Cancel Changes

Lease Payments

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

Add New Lease Payment

Add a Lease Option (if applicable)

1. **Select** Add New Lease Option, if applicable.

2. **Enter** agency data. Red fields are required.

   - Name

     ➔Use Option Type – Option Number (e.g., Cancel – 1)

   - Option Number

     ➔Options should be numbered sequentially (e.g., 1, 2, 3)

   - Option Type

     ➔Dropdown menu

   - Option Description

     ➔Provide a brief desciption of the clause

   - Option Date

   - Reasonably Certain Option Will Be Exercised (yes/no)

     ➔Determines whether the payment should be included in the lease liability and lease asset calculations.

   - Exercise Price

     ➔The exercise price of the purchase option if it is reasonably certain that the lessee will exercise that option.

     ➔Required if option type is Purchase and Reasonably Certain is marked "yes."

3. **Select** SAVE CHANGES

4. **Select** Next

Lease Options

There are no lease options

Add New Lease Option

Edit Lease Option Details

Name

Description

Option Number

Option Type

Option Description

Option Date

Reasonably Certain Option Will Be Exercised ⓘ

Exercise Price ⓘ

Comment

SAVE CHANGES   Cancel Changes

‹ Previous   Next ›   Cancel All Changes

Add a Lease Amendment (if applicable)

1. **Select** Add New Lease Amendment, if applicable.

Lease Amendments

There are no lease amendments

Add New Lease Amendment

2. **Enter** agency data. Red fields are required.

   ➔Refer to the amendments job aid for more details.

   - Name

     ➔Use Amendment Type – Amendment Number (e.g., Extension – 1)

   - Amendment Number

     ➔Amendments should be numbered sequentially (e.g., 1, 2)

   - Amendment Type

     ➔Dropdown menu

   - Amendment Description

     ➔Provide a brief desciption of the amendment

   - Amendment Effective Date

   - Amendment Execution Date

     ➔The date the last party signed.

3. **Select** SAVE CHANGES

Edit Lease Amendment Details

Name

Description

Amendment Number

Amendment Type

Amendment Description

Amendment Effective Date

Amendment Execution Date

Comment

SAVE CHANGES   Cancel Changes

4. **Select** SAVE CHANGES

5. Most amendments require updates to other tables in FPMT. Additionally, a copy of the amendment must be attached in FPMT for all amendments. Refer to the Amendments job aid for instructions.

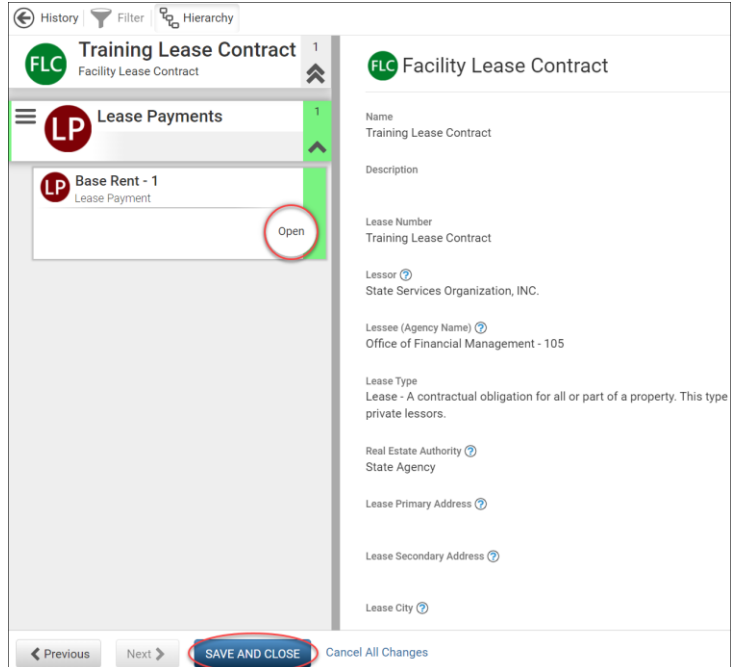❮ Previous   Next ❯   SAVE CHANGES   Cancel Changes

Review Your Data

1. **Select** Next > three times to navigate through the Land Lease and Other Asset Lease tables to reach Data Review.

2. **Select** Open on each tile to review your data. If you need to make a correction, select the Previous button to go back to an earlier table.

3. **Select** SAVE AND CLOSE.

4. The window will automatically close, and you will be returned to your original FPMT window.

   ➜ Your new leased facility record is now complete.

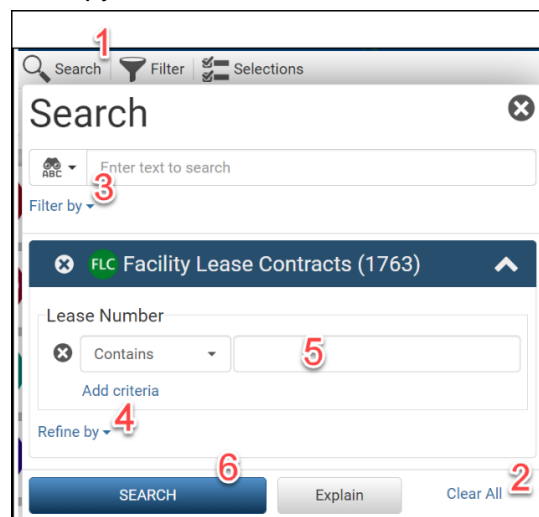   ➜ You'll need to refresh your screen to see your changes.

Note: Continue on to upload a copy of the lease contract.

Upload Copy of New Lease Contract

You will need to navigate to the new lease in order to attach a copy of the contract.

1. **Select** the 🔍 Search button on the data explorer tool bar

2. **Select** Clear All

3. **Select** Filter by ▾ and choose **Facility Lease Contracts**

4. **Select** Refine by ▾ and choose **Lease Number**

5. **Enter** the lease number

6. **Select** the SEARCH button

7. **Select** the ☰ menu button on the new lease contract tile.

8. **Select** Documents

   ➔ The document manager will open in a new window.
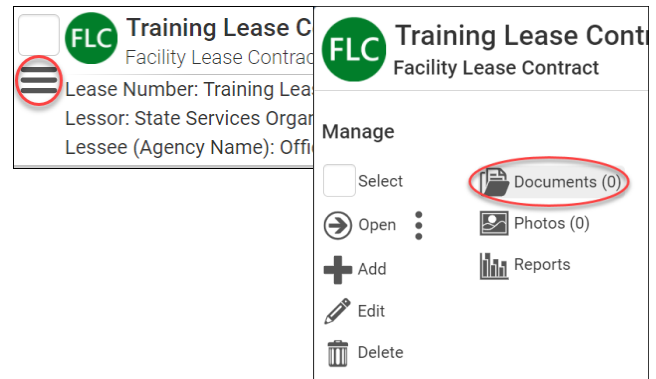
9. **Select** the ⬆ Upload button.
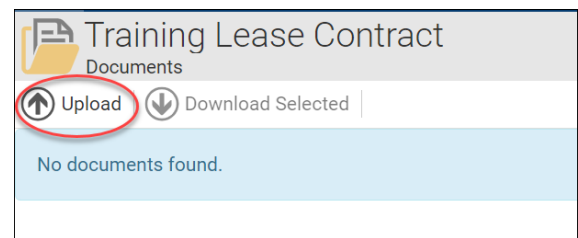
10. **Browse** for, or drag and drop, the file.

11. **Select** CLOSE.