



This job aid provides step-by-step instructions for using the Lease Review wizard to view and update existing leased facility data.

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Overview

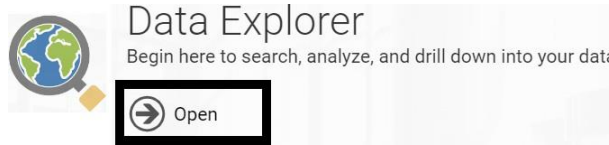
The lease review wizard allows users to view and update all tables associated with existing leased facilities. FPMT will guide you through a sequence of steps to review/edit data.

Step	Action	Additional Information
1	Start business process wizard	Use the search option to find your agency and select lease review business process wizard from the agency menu options.
2	Review/edit leased facilities	Review and edit data if needed.
3	Review changes and exit business process wizard	Use the data review section to review your changes. ✓ Select save and close to exit the business process wizard. ✓ You must go through the entire wizard and select save and close in the data review section in order to save your changes to the database.

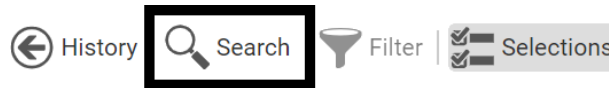
Start Business Process Wizard

The lease review wizard is available from the agency menu.

1. Select: Open.



2. Select: Search.



3. Select: Filter by.

→ FPMT will display a list of criteria.

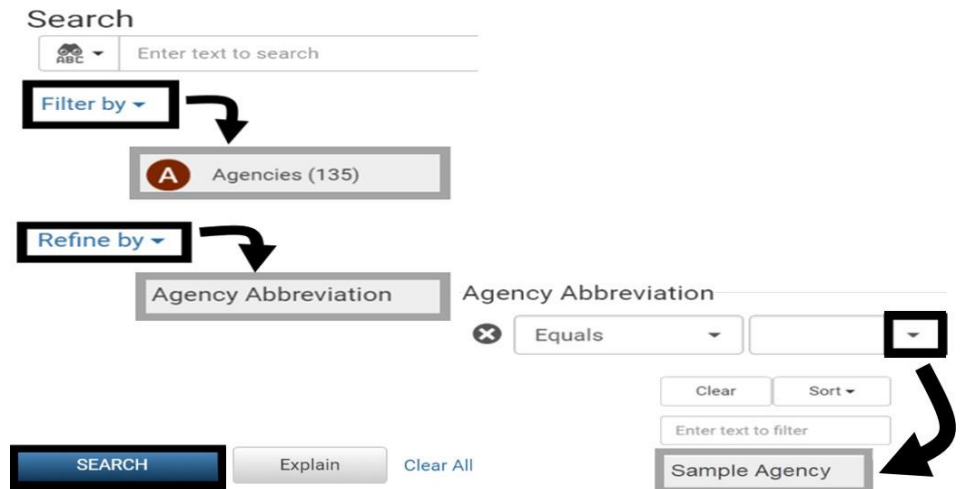
4. Select: Agencies.

5. Select: Refine by.

6. Select: Agency Abbreviation.

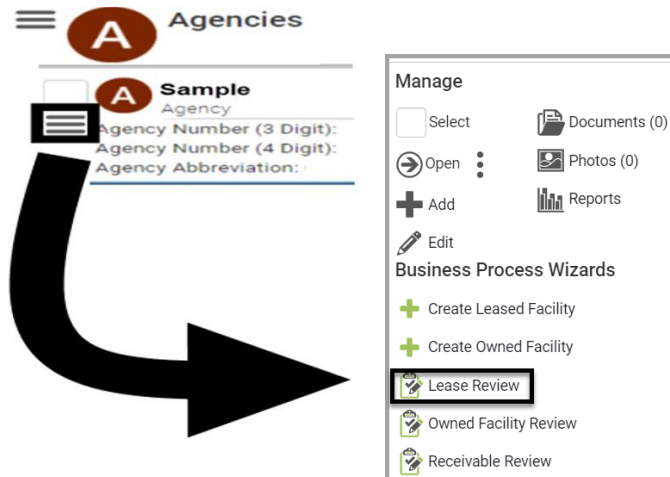
→ FPMT will display additional options depending on your search criteria.

7. Select: Search.



8. Select: Menu.

9. Select: Lease review.



Edit Lease Contracts

FPMT will display a list of active lease contracts for the agency.

- ✓ FPMT will guide you through the sequence of steps to review and edit data for lease contracts. For each lease contract, you can also edit and add payments, options, and amendments.


1. Select: Details.



→ FPMT will display lease contract details.

→ Use the search option to find a lease contract in the list.

Lease Contracts

Search Lease Numbers

Enter Search Text  **Search for lease contract**

Lease Name	Lease Number	Lease Start Date	Lease End Date	Details
Sample	123 Sample	08/31/2020	12/30/2020	
Sample	222 Sample	08/31/2020	12/30/2020	

2. Review/Edit: Lease contract details.

→ Use the scroll bar to review/edit additional data.

3. Select: Next.

→ FPMT will display an error message if there are data validation issues that you need to correct.

Edit Lease Contract Details

Name

Description

Lease Number

Lessor

Lease Type


Real Estate Authority

Edit Leased Facility

FPMT will display the leased facility associated with the lease contract.

- 1. Select: Details.**
 → FPMT will display leased facility details.
 → If you do not want to review/edit your leased facility, select next to go to the next step in the business process wizard.

Leased Facilities


Leased Facility Name	Details
Test OFM Leased Facility	


- 2. Review/Edit: Leased facility details.**
 → Use the scroll bar to review/edit additional data.
 → Users are able to update the condition assessment score in this step.
- 3. Select: Next.**
 → FPMT will display an error message if there are data validation issues that you need to correct.


Edit Leased Facility Details


Name


Description


Agency Assigned Regional Name 

Agency Assigned Regional Number 

Agency Assigned Common Name 

Agency Assigned Number 

Agency Assigned Associated Complex, Campus, Regional Center 

Condition Assessment Score 

Edit Facility


FPMT will display the facility associated with the leased facility.


- 1. Review/Edit:** Facility details.
→ Use the scroll bar to review/edit additional data.
- 2. Select:** Next.
→ FPMT will display an error message if there are data validation issues that you need to correct.


Edit Facility Details

Name


Description

Primary Address 

Secondary Address 

Alternative Address 

City

City - Out of State 

County



[Cancel Changes](#)

Edit Condition Matrix

FPMT will display any condition matrices associated with the leased facility.

- 1. Select:** Details.
→ FPMT will display condition matrix details.
→ If you do not want to review/edit your condition matrix, select next to go to the next step in the business process wizard.

Condition Matrix


Condition Matrix Name	Details	Delete
Test UFI - FY 2024		

- 2. Review/Edit:** Condition matrix details.
→ Use the scroll bar to review/edit additional data.
- 3. Select:** Save changes.
→ FPMT will display an error message if there are data validation issues that you need to correct.
- 4. Select:** Next

Edit Condition Matrix Details

Name
Test UFI - FY 2024

Description

Date of Assessment
3/1/24 

Facility Support and Response Time
Adequate - Response to most service needs, including limited non-maintenance activities, is typic... ▾

Satisfaction
Adequate - Satisfied with facilities- related services, usually complimentary of facilities staff. ▾

Preventive vs. Corrective Maintenance
Adequate - 75-99% ▾

Maintenance
Adequate - A well-developed PM program: most required PMs are done at a frequency slightly les... ▾

Interior
Adequate - Clean/crisp finishes. ▾

SAVE CHANGES [Cancel Changes](#)

[← Previous](#) **Next →** [Cancel Changes](#)

Edit Lease Payments

FPMT will display a list of active lease payments for the lease contract.

- 1. Select:** Details.
→ FPMT will display lease payment details.
→ If you do not want to review/edit your payment(s), select next to go to the next step in the business process wizard.

Lease Payments

Payment Name	Payment Series Number	Details	Delete
Sample	123 Sample		

[Add New Lease Payment](#)

[← Previous](#) [Next →](#) [Cancel Changes](#)

- 2. Review/Edit:** Lease payment details.
→ Use the scroll bar to review/edit additional data.
- 3. Select:** Save changes.
→ FPMT will display the list of lease payments so that you can select another lease payment, add a new lease payment, or go to the next step.
→ FPMT will display an error message if there are data validation issues that you need to correct.

Edit Lease Payment Details

Name

Description

Payment Series Number



Payment Frequency

Payment Type

SAVE CHANGES Cancel Changes

- 4. Select:** Next.

Lease Payments

Payment Name	Payment Series Number	Details	Delete
Sample	123 Sample		

[Add New Lease Payment](#)



◀ Previous **Next >** Cancel Changes

Add New Lease Payment

You can add lease payments to the lease contract.

- 1. Select:** Add new lease payment.
→ FPMT will display lease payment details.

Lease Payments

Payment Name	Payment Series Number	Details	Delete
Sample	123 Sample		

Add New Lease Payment

◀ Previous Next > Cancel Changes

- 2. Input:** Name.
→ Use payment type - payment series number (payment type dash payment series number).
→ Description is optional.

Name

Description

- 3. Input:** Payment series number.
- Use sequential numbers for payment series (1, 2, 3, etc.).
- 4. Select:** Payment frequency.
- 5. Select:** Payment type.
- 6. Input:** Payment amount.

Payment Series Number

Payment Frequency

Payment Type

Payment Amount

- 7. Input:** Index rate.
- Use the index or rate in effect at lease commencement.

Index Rate 

- 8. Input:** Payment start date.
- 9. Input:** Payment end date.

Payment Start Date

Payment End Date

- 10. Select:** Save changes.
- FPMT will display an error message if there are data validation issues that you need to correct.

SAVE CHANGES [Cancel Changes](#)



→ FPMT will close this form so that you can review/edit additional information and proceed to the next step in the business process wizard.

Edit Lease Spaces

FPMT will display a list of active spaces for the lease contract.

- 1. Select:** Details.
- FPMT will display space details.
- If you do not want to review/edit your space(s), select next to go to the next step in the business process wizard.

Lease Spaces

Space Name	Space ID	Details	Delete
Test Space	001		

[Add New Space](#)

[← Previous](#) **Next >** [Cancel Changes](#)

- 2. Review/Edit:** Space details.
→ Use the scroll bar to review/edit additional data.
- 3. Select:** Save changes.

Edit Space Details

Name

Description

Unique Facility ID

Space ID [?](#)

Receivable Lease Number [?](#)

Tenant [?](#)



Other Tenant [?](#)

Square Feet [?](#)

SAVE CHANGES Cancel Changes

- FPMT will display the list of spaces so that you can select another space, add a new space, or go to the next step.
- The sum of all space square feet (including any receivable contract square feet) cannot exceed the lease contract square feet.
- FPMT will display an error message if there are data validation issues that you need to correct.
- 4. Select:** Next

Lease Spaces

Space Name	Space ID	Details	Delete
Test Space	001		

[Add New Space](#)

[← Previous](#) **Next >** [Cancel Changes](#)

Add New Space

You can add additional spaces.

- 1. Select:** Add new space.
→ FPMT will display lease space details.
→ If you are reporting [available space](#), ensure you decrease the square feet in your original space before adding a new space table.

Add New Space

[← Previous](#) [Next >](#) [Cancel Changes](#)

- 2. Input: Name.**
- Use the Space ID.
- Description is optional.

Name

Description

- 3. Input: Space ID**
- UFI-Lease Contract Number-Space Number.
- e.g., A01316-SRL 18-0118-1
- Use sequential space numbers if there is more than one space (e.g., 1, 2, 3).

Space ID

- 4. Input: Square Feet**

Square Feet

- 5. Input: Square Feet Measurement type.**
- 6. Input: Primary Space Type.**

Square Feet Measurement Type

Primary Space Type

- Secondary Space Type is optional.
- Additional Space Type is optional.

Secondary Space Type

Additional Space Type

- 7. Input: Available Space**
- Defaulted to No.
- Annual Full Service Rate per Square Foot and Available Occupancy Date fields become required when Available Space is Yes.

Available Space

- Available Space Type is optional.
- Backfill is optional.

Available Space Type

Backfill

8. Input: Workstation counts.
 → This data is required for facilities that are in scope for the Six-Year Facilities Plan.
 → Select ? for definitions.

→ Annual Full Service Rate per Square Foot and Available Occupancy Date are required when Available Space is Yes.
 → Additional fields related to available space are optional.
 → Agencies are encouraged to provide as much detail as possible about their available spaces.

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) ?

Annual Full Service Rate per Square Foot ?

Available Space Status

Available Occupancy Date

Available Shared Resources ?

Available Furniture ?

Building Access/Security

Near Public Transportation

Parking Available

Available As A Separate Lease At Lease Renewal? ?

9. Select: Save changes.
10. Select: Next.

SAVE CHANGES [Cancel Changes](#)



[← Previous](#) **Next >** [Cancel Changes](#)

Edit Lease Options

FPMT will display a list of active lease options for the lease contract.

1. Select: Details.
 → FPMT will display lease option details.

Lease Options

Option Name	Option Number	Details	Delete
Sample	123 Sample		

[Add New Lease Option](#)

[← Previous](#) [Next >](#) [Cancel Changes](#)

2. Review/Edit: Lease option details.

→ Use the scroll bar to review/edit additional data.

3. Select: Save changes.

→ FPMT will display the list of lease options so that you can select another lease option, add a new lease option, or go to the next step.

→ FPMT will display an error message if there are data validation issues that you need to correct.

Edit Lease Option Details

Name

Sample

Description

Option Number

123 Sample

Option Type

SAVE CHANGES



Cancel Changes

4. Select: Next.

→ FPMT will display the next step to review/edit lease amendments.

→ FPMT will display an error message if there are data validation issues that you need to correct.

Lease Options

Option Name	Option Number	Details	Delete
Sample	123 Sample		

Add New Lease Option

← Previous

Next >

Cancel Changes



Add New Lease Option

You can add lease options to the lease contract.

1. Select: Add new lease option.

→ FPMT will display lease option details.

Lease Options

Option Name	Option Number	Details	Delete
Sample	123 Sample		

Add New Lease Option

← Previous

Next >

Cancel Changes

2. Input: Name.

→ Use option type - option number (option type dash option number).

→ Description is optional.

Name

Description

- 3. Input:** Option number.
→ Use option number in the order it appears in lease contract (1, 2, 3, etc.).
- 4. Select:** Option type.
- 5. Input:** Option description.
→ Option date is optional.

Option Number

Option Type

Option Description

Option Date

→ Comments are optional.

Comment

- 6. Select:** Save changes.
→ FPMT will display an error message if there are data validation issues that you need to correct.

SAVE CHANGES [Cancel Changes](#)

→ FPMT will close this form so that you can review/edit additional information and proceed to the next step in the business process wizard.

Edit Lease Amendments

FPMT will display a list of active lease amendments for the lease contract.

- 1. Select:** Details.
→ FPMT will display lease amendment details.

Lease Amendments

Amendment Name	Amendment Number	Details	Delete
Sample	123 Sample		

[Add New Lease Amendment](#)

[← Previous](#) [Next >](#) **SAVE CHANGES** [Cancel Changes](#)

- 2. Review/Edit:** Lease amendment details.
→ Use the scroll bar to review/edit additional data.
- 3. Select:** Save changes.
→ FPMT will display the list of lease amendments so that you can select another lease amendment, add a new lease amendment, or go to the next step.
→ FPMT will display an error message if there are data validation issues that you need to correct.

Edit Lease Amendment Details

Name

Description

Amendment Number

Amendment Type

Amendment Description

SAVE CHANGES [Cancel Changes](#)

- 4. Select:** Save changes.
→ FPMT will display a list of active lease contracts so that you can select another lease for review or select next to go to the next step.
→ FPMT will display an error message if there are data validation issues that you need to correct.
- 5. Select:** Next.
→ FPMT will display the next step to review/edit lease contracts.



Lease Amendments

Amendment Name	Amendment Number	Details	Delete
Sample	123 Sample		

[Add New Lease Amendment](#)

[< Previous](#)
[Next >](#)
[SAVE CHANGES](#)
[Cancel Changes](#)

→ In this example, we can select another lease contract to review or select next to go to the next step in the business process wizard.

Lease Name	Lease Number	Lease Start Date	Lease End Date	Details
Sample	123 Sample	08/31/2020	12/30/2020	
Sample	222 Sample	08/31/2020	12/30/2020	

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

Add New Lease Amendment

You can add lease amendments to the lease contract.

- ✓ Amendments provide a way to document specific changes for an existing contract. For example, common amendment types include lease extension, change square footage, change rental rate, etc. Upload a copy of the amendment in FPMT after completing the wizard.

- 1. Select:** Add new lease amendment.
→ FPMT will display lease amendment details.

Lease Amendments

Amendment Name	Amendment Number	Details	Delete
Sample	123 Sample		

[Add New Lease Amendment](#)

[< Previous](#)
[Next >](#)
[SAVE CHANGES](#)
[Cancel Changes](#)

- 2. Input:** Name.
→ Use the amendment type and amendment number for the name.
→ Description is optional.

Name

Description

- 3. Input:** Amendment number.
→ Use sequential numbers for amendments in the order they were executed (1, 2, 3, etc.).
- 4. Select:** Amendment type.

Amendment Number

Amendment Type

- 5. Input:** Amendment description.
→ Provide brief description of what has changed in the lease.

Amendment Description

- 6. Input:** Amendment effective date.
- 7. Input:** Amendment execution date.
- Comments are optional.

Amendment Effective Date

Amendment Execution Date

Comment

- 8. Select:** Save changes.
- FPMT will display an error message if there are data validation issues that you need to correct.

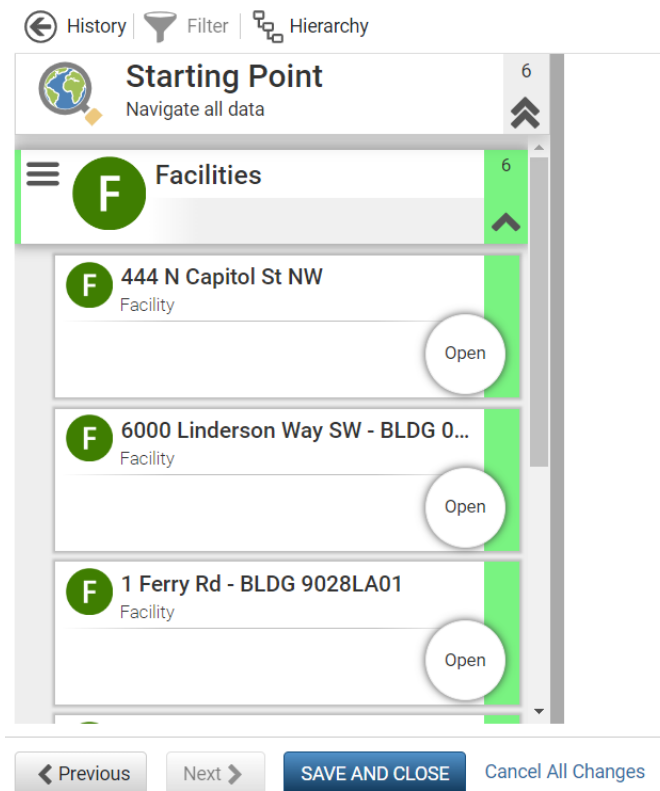
SAVE CHANGES Cancel Changes

→ FPMT will close this form so that you can review/edit additional information and proceed to the next step in the business process wizard.

Data Review and Exit Business Process Wizard

You can expand each area to display specific lease contracts. This provides a quick way to review the information before you save your changes and exit the business process wizard.

- 1. Select:** Open.
- FPMT will display lease information.
- 2. Select:** Save and close.
- Select Previous to return to an earlier screen for edits.
- FPMT will display an error message if there are data validation issues that you need to correct.
- FPMT will save all changes and close the business process wizard.
- ✓ Save and close = save all changes and close the business process wizard.
- ✓ Cancel all changes = cancel all changes and close the business process wizard.



History | Filter | Hierarchy

Starting Point 6
Navigate all data

F Facilities 6

- F** 444 N Capitol St NW
Facility
- F** 6000 Linderson Way SW - BLDG 0...
Facility
- F** 1 Ferry Rd - BLDG 9028LA01
Facility

◀ Previous Next ▶ **SAVE AND CLOSE** Cancel All Changes