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# **FPMT Inventory-Only Data Requirements – Overview**

This checklist provides an overview of the steps needed to complete the 2020 Facilities Inventory data collection process in FPMT. For the Inventory and Six-Year Facilities Plan Combined Checklist, click [here](https://www.ofm.wa.gov/facilities/state-agency-facility-oversight/six-year-facilities-plan).

**Due Dates**: All data entry and associated FPMT reports must be completed and submitted to OFM no later than **June 23, 2020**. New facilities must be entered no later than **June 1**.

* Click the arrows on the left to expand or collapse each section. Each task includes a link to an associated job aid with step-by-step instructions.
* To create a new FPMT account, refer to the [Getting Started](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Getting%20Started%20-%20Request%20New%20FPMT%20Account.pdf) job aid.
* To reset your FPMT password, refer to the [Password Reset](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/FPMT%20Password%20Reset.pdf) job aid.
* For a basic overview of the FPMT user interface, refer to the [FPMT Quick Overview](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/FPMT%20Quick%20Overview%20job%20aid.pdf) job aid.
* Please refer to the [Naming Conventions](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/FPMT%20Naming%20Conventions%20job%20aid.pdf) job aid for guidance on how to name each table in FPMT.
* For assistance with FPMT, please contact the OFM Help Desk at HeretoHelp@ofm.wa.gov or (360) 407-9100.
* For questions about the Facilities Inventory, please contact your [Facilities Analyst](https://ofm.wa.gov/facilities/state-agency-facility-oversight/facilities-oversight-staff-agency-assignments) or send an email to OFM Facilities Planning at ofmfacilitiesoversig@ofm.wa.gov.

# 1. Update Existing Facility Data

##  **Owned Facilities**

### [ ]  Update current owned facilities

[ ]  Verify existing data is accurate

[ ]  Add or update [condition assessment score](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Condition%20Assessment%20Score.pdf), if not current

[ ]  Remove an owned facility from the agency’s portfolio

* **Demolished, sold etc.** – use the [owned facility deactivation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Deactivation%20Wizard.pdf). If staff have moved to a new location that is not currently part of the agency’s portfolio, create a [new owned](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Create%20New%20Owned%20Facility%20Wizard%20job%20aid.pdf) or [leased facility](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Create%20New%20Leased%20Facility%20Wizard%20job%20aid.pdf).
* [**Transfer a facility**](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Transfer%20an%20Owned%20Facility%20job%20aid.pdf) **–** update the status on the facility table to Transfer-Transfer between two state agencies, add a comment in the facility table, and contact OFM at ofmfacilitiesoversig@ofm.wa.gov for the administrative change. Facilities Planning will assist the new owning agency with next steps.

##  **Leased Facilities**

[ ]  Verify existing data is accurate

[ ]  Add or update [condition assessment score](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Condition%20Assessment%20Score.pdf), if not current

### [ ]  Update leases expiring before June 30, 2020

* **Lease renewals** – use the [lease renewal wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Lease%20Renewal%20Wizard%20job%20aid.pdf)
* **Lease extensions** – use a [lease amendment](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/FPMT%20Lease%20Amendment%20job%20aid.pdf) and update the lease contract and lease payment end dates
* [**Holdover status**](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Holdover%20Status%20job%20aid.pdf) (expired lease; agency will continue in space, but new lease has not been executed yet) – update the lease contract and lease payment end dates to 9/9/9999 and add a comment in the lease contract table.
* **Relocation** (vacating facility) – use the [leased facility deactivation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Deactivation%20Wizard.pdf) and add [new leased](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Create%20New%20Leased%20Facility%20Wizard%20job%20aid.pdf) or [owned facility](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Create%20New%20Owned%20Facility%20Wizard%20job%20aid.pdf) for the new location

### [ ]  Update leases expiring on or after June 30, 2020 (update only if needed)

* **Lease amendments** – add a [lease amendment](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/FPMT%20Lease%20Amendment%20job%20aid.pdf) table and edit other tables as needed
* **Relocation** (vacating facility) – use the [leased facility deactivation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Deactivation%20Wizard.pdf) and add [new leased](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Create%20New%20Leased%20Facility%20Wizard%20job%20aid.pdf) or [owned facility](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Create%20New%20Owned%20Facility%20Wizard%20job%20aid.pdf) for the new location

# 2. Add New Facilities (If Applicable)

## **Owned Facilities**

### [ ]  Add [new owned facility](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Create%20New%20Owned%20Facility%20Wizard%20job%20aid.pdf) using FPMT creation wizard

 [ ]  Ensure the Facilities Inventory System field in the facility table is marked “yes”

 [ ]  If the facility serves as a duty station for staff, ensure the HRMS field in the facility table is

 marked “yes”

 [ ]  Geocode the facility (put a point on the map)

 [ ]  Ensure the [condition assessment score](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Condition%20Assessment%20Score.pdf) is populated in the owned facility table

## **Leased Facilities**

 [ ]  Search FPMT for the new facility address to see if it is currently, or was previously, occupied by

 another agency. If the facility already exists in the inventory, you will link to it as part of the

 new leased facility wizard process. If the facility does not exist in the inventory, you will create

 a new one as part of the wizard process. Search instructions included in wizard job aid.

### [ ]  Add [new leased facility](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Create%20New%20Leased%20Facility%20Wizard%20job%20aid.pdf) using FPMT creation wizard

 [ ]  Ensure [condition assessment score](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Condition%20Assessment%20Score.pdf) is populated in the leased facility table

### [ ]  If the facility is not already in the inventory, add new facility (vs. linking to existing one)

 [ ]  Ensure the Facilities Inventory System field in the facility table is marked “yes”

 [ ]  If the leased facility is a duty station for staff, ensure the HRMS field in the facility

 table is marker “yes”

 [ ]  Geocode the facility (put a point on the map)

# 3. Validate Data

 [ ]  Run [QA report](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/QA%20Report%20-%20Run%20and%20Review.pdf) in FPMT and review for potential errors. A clean QA means the report is empty.

 [ ]  Refer to the [data validation job aid](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/QA%20Report%20Data%20Validation%20Instructions.xlsx) for guidance on how to correct errors.

 [ ]  Correct any errors in the report.

 [ ]  After errors are corrected, rerun QA report to ensure all errors have been addressed.

# 4. Submit Reports

 [ ]  Run [Owned and/or Leased Facilities Summary Report(s)](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Owned%20and%20Leased%20Facilities%20Summary%20Reports%20job%20aid.pdf), as applicable, in FPMT and download/save in

 Excel format

 [ ]  Email Owned/Leased Facilities Summary Report(s) to ofmfacilitiesoversig@ofm.wa.gov