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# **SAFS Small Agency Data Requirements – Overview**

This checklist provides an overview of the steps needed to complete the 2023 Facilities Inventory data collection process in FPMT on behalf of small agencies supported by SAFS.

Please note that both the Facilities and Accounting user roles are needed to complete data entry processes. Refer to the [What’s New in FPMT](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/What%27s%20New%20with%20FPMT.pdf) job aid for an overview of role permissions. Each job aid also indicates which role is required for that particular task.

**Due Dates**: All data entry must be submitted to OFM no later than **June 22, 2023**. New owned and leased 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 reset your FPMT password, refer to the [Reset Password](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Reset%20or%20Change%20Password.pdf) job aid.
* Please refer to the [Naming Conventions](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Naming%20Conventions.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 Tim Swenson at timothy.swenson@ofm.wa.gov or send an email to OFM Facilities Oversight and Planning at ofmfacilitiesoversig@ofm.wa.gov.

# 1. Update Agency Data

## ACB, ART, BRPELS, CRAB, CRG, ELUHO, HRC, HUM, LEOFF, PDC, PERC, PLI, TIB, WTECB, OMWBE\* (\*has new locations that need to be entered)

### Leased Facilities (all agencies have at least one leased facility)

#### Update Existing Leased Facilities

 [ ]  Verify existing data is accurate.

 [ ]  Add or update facility [condition assessment score](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf), if not current.

 [ ]  Report [available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable.

##### [ ]  Update existing leases

###### Leases expiring before June 30, 2023

* **Missing lease payments** – use the [Lease Review wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20Review%20Business%20Process%20Wizard.pdf) to add at least one payment series.
* **Lease renewals** – use the [lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20Renewal%20-%20Facility.pdf) and attach supporting lease documentation (outside of wizard, instructions included in renewal job aid)
* **Lease extensions** – use the Lease Review wizard to add a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and update the lease contract and lease payment end dates; attach a copy of the amendment.
* [**Holdover status**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Holdover%20Status%20-%20Facility.pdf) (expired lease; agency will continue in space, but new lease has not been executed yet) – use the Lease Review wizard to update the Holdover Status field in the lease contract table to “yes.”
* **End a lease** (vacating facility) – use the [leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If relocating to a facility that is not currently part of the agency’s portfolio, see [Add New Facilities](#_Add_New_Leased).

###### Leases expiring on or after June 30, 2023 (update only if needed)

* **Missing lease payments** – use the [Lease Review wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20Review%20Business%20Process%20Wizard.pdf) to add at least one lease payment series.
* **Make lease month-to-month** – use the Lease Review wizard to update the [Month-to-Month](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Month-To-Month-Facility.pdf) field in the lease contract table to “yes.”
* [**Add a copy of the lease contract**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Upload%20Lease%20and%20Receivable%20Contracts%20-%20Facility.pdf)to FPMT, if not already attached
* **Lease amendments** (other than extension) – add a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and edit other tables as needed using the Lease Review wizard; attach a copy of the amendment.
* **Cancel a lease** (vacating facility) – use the [leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If relocating to a facility that is not currently part of the agency’s portfolio, see [Add New Facilities](#_Add_New_Leased).

#### Add New Leased Facilities (if applicable)

 [ ]  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://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Leased%20Facility.pdf) – this process involves two wizards

###### [ ] Complete the Create Leased Facility wizard

 [ ] Ensure the “Condition Assessment Score” field is populated in the leased facility

 table or add a [condition matrix](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf) later in the wizard, which will populate the score

 for you.

 [ ]  Ensure the Six Year Facilities Plan field value in the leased facility table is “yes.”

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

 [ ]  Ensure the Facility Type field value in the facility table is “building.”

 [ ]  Ensure the Facilities Inventory field value in the facility table is “yes.”

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

 the facility table is “yes.”

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

 [ ] Report [available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable.

 [ ]  Attach copy of lease contract in the lease contract table (outside of wizard).

###### [ ]  Complete the Lease Review wizard

 [ ]  Enter the required data in the lease contract table.

 [ ]  Add at least one lease payment series.

 [ ]  Add lease option, if applicable.

### Receivable Facilities (some have a receivable lease as well)

 [ ]  Receivable tenant agencies do not need to update their receivable contracts. The lessor is

 responsible for entering and maintaining receivable leases in FPMT. If the tenant agency has

 vacated a receivable location, the new location will need to be captured in FPMT. If the agency

 has a new sublease, the lessor will enter the data. If it’s a leased location (not a sublease), refer

 to the [Add New Leased Facilities](#_☐__Add) section above.

## EWH (Owned Facilities Only)

### Owned Facilities

#### Update existing owned facilities

 [ ]  Verify existing data is accurate

 [ ]  Add or update [condition assessment score](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf), if not current

 [ ]  Report [available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable

##### [ ]  Add receivable lease(s), if applicable – this process involves two wizards

  [ ]  Complete Create Receivable Lease wizard.

 [ ]  Attach copy of receivable contract.

 [ ]  Complete Receivable Review wizard.

#### Add new owned facilities

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

 [ ]  Ensure the Facility Type field value in the facility table is “building.”

 [ ]  Ensure the Facilities Inventory field value in the facility table is “yes.”

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

 facility table is “yes.”

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

 [ ]  Ensure [condition assessment score](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf) in the owned facility table is populated.

 [ ]  Report [available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable.

#### Remove an owned facility from the agency’s portfolio

* **Demolished, sold etc.** – use the [owned facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If staff are relocating to a facility that is not currently part of the agency’s portfolio, see [Add New Facilities](#_Add_New_Leased).
* [**Transfer a facility**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Transfer%20a%20Facility.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. OFM will assist the new owning agency with next steps.

## APA, BPC, BTA, CAA, CFC, CHA, CJC, COS, DAHP, ERFC, INA, LTG, WSLB\*, EFSEC\* (\*will need new receivable leases entered by the lessor agency)

### Receivable Facilities Only

 [ ]  Receivable tenant agencies do not need to update their receivable contracts. The lessor agency is

 responsible for entering and maintaining receivable leases in FPMT. If the tenant agency has

 vacated a receivable location, the new location will need to be captured in FPMT. If the agency

 has a new sublease, the lessor will enter the data. If it’s a leased location (not a sublease), refer to

 the [Add New Leased Facilities](#_☐__Add) section above.

# 2. Validate Data

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

 [ ]  Refer to the [QA Report Correction Steps](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/QA%20Report%20Correction%20Steps.xlsx) job aid for guidance on how to correct errors.

 [ ]  Correct any errors in the report.

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

# 3. Submit Data

 [ ]  [Notify OFM](https://ofm.wa.gov/sites/default/files/public/facilities/FIS/2023/FPMT%20Data%20Submission.pdf) via FPMT when inventory data for each small agency is complete – do not submit agency

 data if pending facilities entered by June 1 have not been approved by OFM.