#

#

# **Facilities Inventory Data Requirements – Overview**

This checklist provides an overview of the steps needed to complete the 2024 Facilities Inventory data collection process in FPMT. As of April 2024, there is only one agency editor role in FPMT, which has permissions to all wizards. 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 recent system updates.

Requirements are refined by type of facility. For receivable leased facilities, lessor (master lease holder or owning agency) responsibilities are detailed as a subsection of owned and leased facilities.

**Due Dates**: All data must be submitted to OFM no later than **June 23, 2024**. 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.
* Manual editing permissions have been reduced to improve data quality. Agency editors are now required to use business process wizards.
* Definitions of Facility, Lease and Receivable Lease:
* **Facility**: a building with at least one wall, a roof and a permanent foundation, regardless of occupancy or cost.
* **Lease**: a lease contract, MOU, IAA, RSA, federal license, or any other type of agreement for space regardless of whether there is an exchange of money (e.g., $0 leases).
* **Receivable Lease** (or sublease): a lease agreement between an agency that owns a building or is the holder of the master lease and a tenant. This includes DES Occupancy Agreements for space on the Capitol Campus.
* To create a new FPMT account, refer to the [Request New User Account](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Request%20New%20User%20Account.pdf) job aid. Please note that all new accounts are Read Only by default. Edit rights must be requested and approved by your agency’s [FPMT Administrator](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/FPMT_Agency_Administrators.xlsx) via an email to the OFM Help Desk.
* To reset your FPMT password, refer to the [Reset or Change Password](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Reset%20or%20Change%20Password.pdf) job aid.
* For a basic overview of the FPMT user interface, refer to the [Quick Overview and Basic Navigation](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Quick%20Overview%20and%20Basic%20Navigation.pdf) job aid and [Intro to FPMT eLearning](https://ofm.wa.gov/it-systems/facility-system/facilities-portfolio-management-tool-fpmt/introduction-fpmt-facilities-users-elearning).
* 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 your assigned [OFM Facilities Analyst](https://ofm.wa.gov/facilities/state-agency-facility-oversight/facilities-oversight-staff-agency-assignments) or send an email to OFM Facilities Oversight and 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 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.

#### [ ]  Receivable leases (if applicable)

#####  [ ]  Update existing receivable leases expiring before June 30, 2024.

* **Lease renewals** – use the FPMT [receivable lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Lease%20Renewal%20-%20Facility.pdf) and attach a copy of the receivable lease (outside of wizard, instructions included in renewal job aid).
* **Lease extensions** – use the Receivable Review wizard to add a [receivable lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20And%20Receivable%20Lease%20Amendments%20-%20Facility.pdf) and update the receivable lease contract and receivable 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 Receivable Review wizard to update the Holdover Status field in the receivable lease contract table to “yes” and add a note in the Comment field.
* **End a receivable lease** – use the [receivable leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf) if the receivable lease contract is not being renewed or extended.

 [ ]  Update existing receivable leases expiring on or after June 30, 2024 (update only if needed).

* **Lease amendments** (other than extension) – add a [receivable 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 Receivable Review wizard; attach a copy of the amendment.
* **Make receivable lease month-to-month** – use the Receivable 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 receivable lease contract table to “yes” and add a note in the Comment field.
* [**Add a copy of the receivable 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
* **Cancel a receivable lease** – use the [receivable leased facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).

#####  [ ]  Add receivable lease(s), if applicable.

 [ ]  Complete [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard.

 [ ]  Attach copy of receivable contract.

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

* **Demolished or sold** – use the [owned facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf). If staff have moved to a new location that is not currently part of the agency’s portfolio, see [Section 2. Add New Facilities](#_2._Add_New).
* **Transfer a facility** – contact OFM at ofmfacilitiesoversig@ofm.wa.gov for the administrative change. Facilities Oversight and Planning will assist the new owning agency with next steps.

##  **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.

####  [ ]  Standard leases

#####  [ ]  Leases expiring before June 30, 2024

* **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” and add a note in the Comment field.
* **Add receivable lease(s)**

 [ ]  Complete [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard.

 [ ]  Attach copy of receivable contract.

* **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 staff are relocating to a facility that is not currently in the agency’s portfolio, refer to [Section 2. Add New Facilities](#_2._Add_New).

#####  [ ]  Leases expiring on or after June 30, 2024 (update only if needed)

* **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.
* **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” and add a note in the Comment field.
* [**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.
* **Add receivable lease(s), if applicable**

 [ ]  Complete [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard.

 [ ]  Attach copy of receivable contract.

* **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 staff are relocating to a facility that is not currently in the agency’s portfolio, refer to [Section 2. Add New Facilities](#_2._Add_New).

####  [ ]  Master leases with one or more receivable leases

#####  [ ]  Master leases expiring before June 30, 2024

* **Lease renewals** – use the [master lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Master%20Lease%20and%20Receivable%20Lease%20Renewal%20-%20Facility.pdf) and attach supporting lease and receivable lease documentation (outside of wizard, instructions included in renewal job aid).

 **Note: Receivable leases must be renewed at the same time as the master lease or they will be automatically deactivated.**

* **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. If the receivable lease is also being extended, follow same steps for the receivable lease using the Receivable Review wizard. If the receivable lease is not being continued, use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).
* [**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.” If the receivable lease is also in holdover status, follow same steps for the receivable lease using the Receivable Review wizard. Add a note in the Comment field about the status of the contract. If the receivable lease is not being continued, use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).
* **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 staff are relocating to a facility that is not currently in the agency’s portfolio, refer to [Section 2. Add New Facilities](#_2._Add_New).

#####  [ ]  Master leases expiring on or after June 30, 2024 (update only if needed)

* **Receivable lease renewal** (expiring before master lease) – use the [receivable lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Lease%20Renewal%20-%20Facility.pdf) and attach supporting receivable lease documentation (outside of wizard, instructions included in receivable lease renewal job aid).
* **Make the master and/or receivable 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” and/or use the Receivable 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 receivable lease contract table to “yes.” Add a note in the Comment field explaining why the contract is month-to-month.
* [**Add a copy of the lease and receivable lease contracts**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Upload%20Lease%20and%20Receivable%20Contracts%20-%20Facility.pdf)to FPMT, if not already attached.
* **Cancel the receivable lease –** use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).
* **Cancel the master lease –** use the [leased 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 in the agency’s portfolio, refer to [Section 2. Add New Facilities](#_2._Add_New).
* **Master 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.
* **Receivable lease amendments** (other than extension) – add a [receivable 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 Receivable Review wizard; attach a copy of the amendment.

# 2. Add New Facilities (If Applicable)

##  **Owned Facilities**

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

 [ ]  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 the “Condition Assessment Score” field is populated in the owned 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 a condition assessment score for you.

### [ ]  Add new receivable lease(s), if applicable.

 [ ]  Complete [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard.

 [ ]  Attach copy of receivable contract.

## **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://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Leased%20Facility.pdf) using FPMT creation 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.

####  [ ]  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).

### [ ]  Add new receivable lease(s) (if applicable).

 [ ]  Complete the [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard.

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

# 3. Validate Data

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

 [ ]  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 report to ensure all errors have been addressed.

# 4. Submit Data

 [ ]  [Notify OFM](https://ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2025-2031/FPMT%20Data%20Submission.pdf) via FPMT when inventory data is complete – do not submit data if your agency has

 pending facilities that have not yet been approved by OFM.