# Small Agency Inventory Data Requirements - Overview

This checklist provides an overview of the steps needed to complete the 2025 Facilities Inventory data collection process in FPMT on behalf of small agencies.

**Due Dates**: All data must be submitted to OFM no later than June 23, 2025. New owned and leased facilities must be entered no later than June 2.

* 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.
* 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 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.
* For a refresher on 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-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 Linda Ward at linda.ward@ofm.wa.gov or send an email to OFM Facilities Oversight and Planning at ofmfacilitiesoversig@ofm.wa.gov.

# Update Agency Data

## ACB, ART, BRPELS, BVFFRO, CRAB, CRG, ELUHO, HRC, HUM, LEOFF, PDC, PERC, PLI, PSP, OMWBE, TIB, WTECB

### 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.
* Add or update [workstation counts](https://ofm.wa.gov/sites/default/files/public/facilities/FIS/2025/Report%20Workstation%20Data.pdf), if not current (**office spaces only**).

##### Leases expiring before June 30, 2025.

* **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 as part of the wizard process. If the lease has an associated receivable lease, use the [master lease renewal](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Master%20Lease%20and%20Receivable%20Lease%20Renewal%20-%20Facility.pdf) 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 as part of the wizard process. If you need to extend an associated receivable lease as well, the amendment job aid also includes instructions for adding receivable amendments.
* **Holdover status** (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](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Holdover%20Status%20-%20Facility.pdf) field in the lease contract table to “yes” and add a note in the Comment field. If the contract has an associated receivable lease that is also in holdover, ensure to update the Holdover Status field in the receivable contract table as well using the Receivable Review wizard.
* **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 part of the state’s

inventory, create a new facility to generate a new UFI before deactivating the old facility.

* If staff are relocating, ensure to populate the Relocation UFI and Relocation Contract Number when prompted in the deactivation wizard.

##### Leases expiring on or after June 30, 2025.

* **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. If the contract is a master lease, use the Receivable Review wizard to update the Month-to-Month field to “yes” in the receivable contract table.
* **Add a copy of the lease contract(s)** to FPMT, if not already attached. Use the [lease review wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Lease%20Review%20Business%20Process%20Wizard.pdf) or [add an attachment manually](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Upload%20Lease%20and%20Receivable%20Contracts%20-%20Facility.pdf). If the contract is a master lease, ensure to also attach a copy of the receivable lease using the [receivable review wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Review%20Business%20Process%20Wizard.pdf) or the [manual upload](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Upload%20Lease%20and%20Receivable%20Contracts%20-%20Facility.pdf) process.
* **Lease amendments** (other than extension) – 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 edit other tables as needed; attach a copy of the amendment as part of the wizard process. If you need to amend an associated receivable lease as well, the amendment job aid also includes instructions for adding receivable amendments.
* **Add receivable lease(s), if appliable** – use the [create receivable lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard and attach a copy of the receivable contract as part of the wizard process.
* **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 part of the state’s inventory, create a new facility to generate a new UFI before deactivating the old facility.
* If staff are relocating, ensure to populate the Relocation UFI and Relocation Contract Number when prompted in the deactivation wizard.

#### Add new leased facility

* 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](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Matrix%20-%20Facility.pdf) in the leased facility table is populated.
* Ensure the Six Year Facilities Plan field value in the leased facility table is “yes.” (**office spaces only**)

###### If the facility is not 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).
* Attach copy of lease contract in the lease contract table.
* [Report available space](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Available%20Space.pdf), if applicable.
* Add [workstation counts](https://ofm.wa.gov/sites/default/files/public/facilities/FIS/2025/Report%20Workstation%20Data.pdf) in the space table (**office spaces only**).

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

* Receivable tenant agencies do not need to renew 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 Facility](#_Add_new_leased) section above.
* Add/update [workstation counts](https://ofm.wa.gov/sites/default/files/public/facilities/FIS/2025/Report%20Workstation%20Data.pdf) (**office spaces only**).

## EWH

### Owned Facilities Only (workstation counts are not required)

#### Update existing 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.

##### Add receivable leases, if applicable.

* Complete [Create Receivable Lease](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) wizard and attach copy of receivable lease while in the wizard.

#### Add new owned facility

##### [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 [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 owned facility from 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 are relocating to a facility that is not currently part of the agency’s portfolio, see [Add New Owned Facility](#_Add_new_owned) section above.
* **Transfer a facility** – 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, EFRC, EFSEC, INA, LTG, WSLB

### Receivable Facilities Only

* Receivable tenant agencies do not need to renew 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 Facility](#_Add_new_leased) section above.
* Add/update [workstation counts](https://ofm.wa.gov/sites/default/files/public/facilities/FIS/2025/Report%20Workstation%20Data.pdf) (**office spaces only**).

# 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.

# Submit Data

* [Notify OFM](https://ofm.wa.gov/sites/default/files/public/facilities/FIS/2025/FPMT%20Data%20Submission.pdf) when inventory data is complete via FPMT (for each small agency) – do not submit data if the agency has pending facilities that have not yet been approved by OFM.