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# **FPMT Combined Data Requirements – Overview**

This checklist provides an overview of the steps needed to complete both the 2020 Facilities Inventory and 2021-27 Six-Year Facilities Plan baseline data collection processes in FPMT. For Agency Desired Plan instructions, click [here](https://www.ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2021-2027/Agency%20Desired%20Plan%20job%20aid.pdf).

Data requirements are organized by whether facilities are in scope or out of scope for the Six-Year Facilities Plan. In-scope facilities have data requirements in addition to basic inventory data. Requirements are further 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. Tenant agency responsibilities are listed separately.

**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 see a list of your agency’s in-scope facilities, run the [Agency Desired Six Year Facilities Plan report](https://www.ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2021-2027/Agency%20Desired%20Plan%20job%20aid.pdf).
* 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](mailto:HeretoHelp@ofm.wa.gov) or (360) 407-9100.
* For questions about the Facilities Inventory or Six-Year Facilities Plan, 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](mailto:ofmfacilitiesoversig@ofm.wa.gov).

# 1. Update Existing In-Scope Facility Data

## **Owned Facilities**

### Update current owned facilities

Verify existing data is accurate

Add annual [operating costs](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Operating%20Costs%20job%20aid.pdf) for fiscal year 2020 (use fiscal year 2019 annual operating costs as

an estimate **OR** use OFM’s [estimated operating expenses](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/2020OperatingExpenses-FINAL.pdf))

Add or update [workstation and occupancy data](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Workstation%20and%20Occupancy%20Data%20job%20aid.pdf), if not current

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

Add [debt service](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Debt%20Service%20job%20aid.pdf) (if applicable)

#### Update existing receivable leases (if applicable)

##### Receivable leases expiring before June 30, 2020

* **Lease renewals** – use the FPMT [receivable lease renewal wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Receivable%20Lease%20Renewal%20Wizard%20job%20aid.pdf) and attach a copy of the receivable lease (outside of wizard, instructions included in renewal job aid)
* **Lease extensions** – use a [receivable lease amendment](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/FPMT%20Lease%20Amendment%20job%20aid.pdf), update the receivable lease contract and receivable lease payment end dates and attach a copy of the amendment
* [**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 receivable lease and receivable lease payment end dates to 9/9/9999 and add a comment in the receivable lease contract table
* **End a lease** – use the [receivable leased facility deactivation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Deactivation%20Wizard.pdf) if the receivable lease contract is not being renewed or extended

Receivable leases expiring on or after June 30, 2020 (update only if needed)

* **Lease amendments** (other than extension) – add a [receivable lease amendment](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/FPMT%20Lease%20Amendment%20job%20aid.pdf), edit other tables as needed and attach a copy of the amendment
* **Cancel a lease** – use the [receivable leased facility deactivation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Deactivation%20Wizard.pdf)

#### Add new receivable lease(s) (if applicable)

Use the [receivable lease creation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Create%20New%20Receivable%20Lease%20Wizard%20job%20aid.pdf) and attach a copy of the receivable lease (outside

of wizard, instructions included in wizard job aid)

Notify the tenant agency when the receivable lease has been created so they can verify

their agency’s data is accurate and make their required system updates.

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

Add annual [operating costs](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Operating%20Costs%20job%20aid.pdf) for fiscal year 2020 (use fiscal year 2019 annual operating costs as an

estimate **OR** use OFM’s [estimated operating expenses](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/2020OperatingExpenses-FINAL.pdf))

Add or update [workstation and occupancy data](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Workstation%20and%20Occupancy%20Data%20job%20aid.pdf), if not current

**Note: If you are renewing a lease, you can do this step inside the lease renewal wizard**

### Update existing leases

#### Standard leases

##### 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) and attach supporting lease documentation (outside of wizard, instructions included in renewal job aid)
* **Lease extensions** – use a [lease amendment](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/FPMT%20Lease%20Amendment%20job%20aid.pdf), update the lease contract and lease payment end dates and attach a copy of the amendment
* [**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 new location

##### Leases expiring on or after June 30, 2020 (update only if needed)

* **Lease amendments** (other than extension) – add a [lease amendment](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/FPMT%20Lease%20Amendment%20job%20aid.pdf), edit other tables as needed and attach a copy of the amendment
* **Relocation** (vacating facility) – use the [leased facility deactivation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Deactivation%20Wizard.pdf) AND create a [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

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

##### Master leases expiring before June 30, 2020

* **Lease renewals** – use the [master lease renewal wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Master%20Lease%20and%20Receivable%20Lease%20Renewal%20Wizard%20job%20aid.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 a [lease amendment](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/FPMT%20Lease%20Amendment%20job%20aid.pdf), update the lease contract and lease payment end dates and attach a copy of the amendment. If the receivable lease is also being extended, follow same steps for receivable lease. If the receivable lease is not being continued, use the [receivable lease deactivation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Deactivation%20Wizard.pdf).
* [**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. If the receivable lease is also in holdover status, follow same steps for the receivable lease. If the receivable lease is not being continued, use the [receivable lease deactivation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Deactivation%20Wizard.pdf).
* **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 a [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

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

* **Receivable lease renewal** (expiring before master lease) – use the [receivable lease renewal wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Receivable%20Lease%20Renewal%20Wizard%20job%20aid.pdf) and attach supporting receivable lease documentation (outside of wizard, instructions included in receivable lease renewal job aid)
* **End the receivable lease –** use the [receivable lease deactivation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Deactivation%20Wizard.pdf)
* **Master lease amendments** (other than extension) – add a [lease amendment](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/FPMT%20Lease%20Amendment%20job%20aid.pdf), edit other tables as needed and attach a copy of the amendment
* **Receivable lease amendments** (other than extension) – add a [receivable lease amendment](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/FPMT%20Lease%20Amendment%20job%20aid.pdf), edit other tables as needed and attach a copy of the amendment

### Add new receivable lease(s) (if applicable)

Use the [receivable lease creation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Create%20New%20Receivable%20Lease%20Wizard%20job%20aid.pdf) and attach a copy of the receivable lease (outside

of wizard, instructions included in wizard job aid)

Notify the tenant agency when the receivable lease has been created so they can verify

their agency’s data is accurate and make their required system updates.

## **Receivable Leased Facilities (Tenant Agency)**

Verify [tenant data is accurate and add workstation and occupancy data](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Receivable%20Lease%20-%20Tenant%20Agency%20Data.pdf)

# 2. Update Existing Out-of-Scope Facility Data (If Applicable)

## **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](mailto: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

# 3. Add New Facilities (If Applicable)

## **In-Scope Facilities**

### 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

Ensure that the Six Year Facilities Plan field in the owned facility table is marked “yes.”

Add debt service, if applicable

Add annual operating costs for fiscal year 2020 (if no actuals are available, use OFM’s

[estimated operating costs](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/2020OperatingExpenses-FINAL.pdf))

Add [workstation and occupancy data](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Workstation%20and%20Occupancy%20Data%20job%20aid.pdf) in the space table

#### Add new receivable lease(s) (if applicable)

Use the [receivable lease creation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Create%20New%20Receivable%20Lease%20Wizard%20job%20aid.pdf) and attach a copy of the receivable lease (outside

of wizard, instructions included in wizard job aid)

Notify the tenant agency when the receivable lease has been created so they can verify

their agency’s data is accurate and make their required system updates.

### 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 and attach copy of lease contract

Ensure the condition assessment score in the leased facility table is populated

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

##### 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 marked “yes”

Geocode the facility (put a point on the map)

Add workstation and occupancy data in the space table

Add annual operating costs for fiscal year 2020 (if actuals are not yet available, use OFM’s

[estimated operating costs](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/2020OperatingExpenses-FINAL.pdf))

Add the Amortized Tenant Improvement cost (if applicable) as a lease payment series

#### Add new receivable lease(s) (if applicable)

Use the [receivable lease creation wizard](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Create%20New%20Receivable%20Lease%20Wizard%20job%20aid.pdf) and attach a copy of the receivable lease (outside of

wizard, instructions included in wizard job aid)

Notify the tenant agency when the receivable lease has been created so they can verify

their agency’s data is accurate and make their required system updates.

### Receivable Leased Facilities (Tenant Agency)

Verify [tenant data is accurate and add workstation and occupancy data](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Receivable%20Lease%20-%20Tenant%20Agency%20Data.pdf)

## **Out-of-Scope Facilities**

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

### 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 marked “yes”

Geocode the facility (put a point on the map)

# 4. 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.

# 5. 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

Run the [Baseline Report](https://www.ofm.wa.gov/sites/default/files/public/facilities/FPMT/Baseline%20Report%20job%20aid.pdf) in FPMT and download/save in Excel format

Email Owned/Leased Facilities Summary Report(s) and Baseline Report to

[ofmfacilitiesoversig@ofm.wa.gov](mailto:ofmfacilitiesoversig@ofm.wa.gov)