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# **FPMT Combined Data Requirements – Overview**

This checklist provides an overview of the steps needed to complete both the 2022 Facilities Inventory and 2023-29 Six-Year Facilities Plan baseline data collection processes in FPMT. For Agency Desired Plan instructions, click [here](https://ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2023-2029/Agency%20Desired%20Plan%20Instructions.pdf). 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.

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 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 must be submitted to OFM no later than **June 23, 2022**. 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 see a list of your agency’s in-scope facilities, run the [Agency Desired Six Year Facilities Plan report](https://ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2023-2029/Agency%20Desired%20Plan%20Instructions.pdf).
* 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.
* 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 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, [FPMT eLearning for facilities users](https://ofm.wa.gov/it-systems/facility-system/facilities-portfolio-management-tool-fpmt/introduction-fpmt-facilities-users-elearning) and [FPMT eLearning for accounting users](https://ofm.wa.gov/it-systems/facility-system/facilities-portfolio-management-tool-fpmt/introduction-fpmt-accounting-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](mailto:HeretoHelp@ofm.wa.gov) or (360) 407-9100.
* For questions about the Facilities Inventory or Six-Year Facilities Plan, please contact your assigned [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](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://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Operating%20Costs%20-%20Facility.pdf) for fiscal year 2022 (use fiscal year 2021 annual operating costs as

an estimate **OR** use OFM’s [estimated operating expenses](https://ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2023-2029/2022OperatingExpenseAssumptions.xlsx)).

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

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

Add debt service (if applicable) – if you need to report debt service that is not already captured in FPMT, contact your [assigned facilities analyst](https://ofm.wa.gov/facilities/state-agency-facility-oversight/facilities-oversight-staff-agency-assignments), and OFM will work with you to import the data.

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

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

##### Receivable leases expiring before June 30, 2022

* **Missing receivable payments** – use the [Receivable Review wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Review%20Business%20Process%20Wizard.pdf) to add at least one receivable payment series.
* **Receivable 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).
* **Receivable lease extensions** – use a [receivable lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/LeaseAndReceivableLeaseAmendments_Facility_Dec2021.pdf), update the receivable lease contract and receivable lease payment end dates and 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) – 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://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.

Receivable leases expiring on or after June 30, 2022 (update only if needed)

* **Missing receivable payments** – use the [Receivable Review wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Review%20Business%20Process%20Wizard.pdf) to add at least one receivable payment series.
* **Receivable amendments** (other than extension) – add a [receivable lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/LeaseAndReceivableLeaseAmendments_Facility_Dec2021.pdf), edit other tables as needed and attach a copy of the amendment.
* **Cancel a 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)](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) *(if applicable)* – this process involves two wizards

Complete Create Receivable Lease wizard.

Attach copy of receivable contract.

Complete Receivable Review wizard.

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

their required system updates.

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 [Section 3. Add New Facilities](#_3._Add_New).
* [**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](mailto:ofmfacilitiesoversig@ofm.wa.gov) for the administrative change. OFM 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%20Assessment%20Score.pdf), if not current.

Add annual [operating costs](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Operating%20Costs%20-%20Facility.pdf) for fiscal year 2022 (use fiscal year 2021 annual operating costs as an

estimate **OR** use OFM’s [estimated operating expenses](https://ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2023-2029/2022OperatingExpenseAssumptions.xlsx)).

Add or update [workstation and occupancy data](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Workstation%20and%20Occupancy%20Data.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, 2022

* **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 a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/LeaseAndReceivableLeaseAmendments_Facility_Dec2021.pdf), update the lease contract and lease payment end dates and 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) – update the lease contract and lease payment end dates to 9/9/9999 and add a comment in the lease contract table
* **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 [Section 3. Add New Facilities](#_3._Add_New).

##### Leases expiring on or after June 30, 2022 (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.
* **Lease amendments** (other than extension) – add a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/LeaseAndReceivableLeaseAmendments_Facility_Dec2021.pdf), edit other tables as needed and 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 [Section 3. Add New Facilities](#_3._Add_New).

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

##### Master leases expiring before June 30, 2022

* **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 and the [Receivable Review wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Review%20Business%20Process%20Wizard.pdf) to add a least one receivable payment series.
* **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 a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/LeaseAndReceivableLeaseAmendments_Facility_Dec2021.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 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) - 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 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 part of the agency’s portfolio, see [Section 3. Add New Facilities](#_3._Add_New).

##### Master leases expiring on or after June 30, 2022 (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 and the [Receivable Review wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Review%20Business%20Process%20Wizard.pdf) to add at least one receivable payment series.
* **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 job aid).
* **Cancel a receivable lease –** use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).
* **Cancel a 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 part of the agency’s portfolio, see [Section 3. Add New Facilities](#_3._Add_New).
* **Master lease amendments** (other than extension) – add a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/LeaseAndReceivableLeaseAmendments_Facility_Dec2021.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://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/LeaseAndReceivableLeaseAmendments_Facility_Dec2021.pdf) edit other tables as needed and attach a copy of the amendment.

### [Add new receivable lease(s)](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) (if applicable) – this process involves two wizards

Complete Create Receivable Lease wizard.

Attach copy of receivable contract.

Complete Receivable Review wizard.

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

their required system updates.

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

Add/update [workstation and occupancy data](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Workstation%20and%20Occupancy%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://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Assessment%20Score.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 receivable lease(s), if applicable

**Missing receivable payments** – use the [Receivable Review wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Review%20Business%20Process%20Wizard.pdf) to add at least one

receivable payment series.

**Renew a receivable lease** – use the [receivable lease renewal wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Lease%20Renewal%20-%20Facility.pdf).

**Cancel a receivable lease** – use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).

#### [Add receivable lease(s)](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf), if applicable – this process involves two wizards

Complete Create Receivable Lease wizard.

Attach copy of receivable contract.

Complete Receivable Review wizard

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 [Section 3. Add New Facilities](#_3._Add_New).
* [**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](mailto:ofmfacilitiesoversig@ofm.wa.gov) for the administrative change. OFM will assist the new owning agency with next steps.

## **Leased Facilities**

Verify existing data is accurate

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

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

### Update leases expiring before June 30, 2022

* **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 and the [Receivable Review wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Receivable%20Review%20Business%20Process%20Wizard.pdf) to add at least one receivable 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 a copy of the lease contract
* **Lease extensions** – use a [lease amendment](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/LeaseAndReceivableLeaseAmendments_Facility_Dec2021.pdf), update the lease contract and lease payment end dates, and 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) – update the lease contract and lease payment end dates to 9/9/9999 and add a comment in the lease contract table
* **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 new location, see [Section 3. Add New Facilities](#_3._Add_New).
* **End a receivable lease** – use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).
* [**Add receivable lease(s)**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf), if applicable – this process involves two wizards

Complete Create Receivable Lease wizard

Attach copy of receivable contract

Complete Receivable Review wizard

### Update leases expiring on or after June 30, 2022 (update only if needed)

* **Lease amendments** – add a [lease amendment table](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/LeaseAndReceivableLeaseAmendments_Facility_Dec2021.pdf) and edit other tables as 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.
* **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 new location, see [Section 3. Add New Facilities](#_3._Add_New).
* **Cancel a receivable lease** – use the [receivable facility deactivation wizard](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Deactivation%20Wizard%20-%20Facility.pdf).
* [**Add receivable lease(s)**](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf), if applicable – this process involves two wizards

Complete Create Receivable Lease wizard

Attach copy of receivable contract

Complete Receivable Review wizard

# 3. Add New Facilities (If Applicable)

## **In-Scope Facilities**

### 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 facility serves as 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](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Assessment%20Score.pdf) is populated in the owned facility table

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

Add debt service – if you need to add debt service to FPMT, contact your [facilities analyst](https://ofm.wa.gov/facilities/state-agency-facility-oversight/facilities-oversight-staff-agency-assignments),

and OFM will work with you to import the data

Add annual [operating costs](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Operating%20Costs%20-%20Facility.pdf) for fiscal year 2022 (use 2021 actual costs as estimate for 2022

costs). **Enter 2022 in the Fiscal Year field.** If no actuals are available, use OFM’s [estimated](https://ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2023-2029/2022OperatingExpenseAssumptions.xlsx)

[operating costs](https://ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2023-2029/2022OperatingExpenseAssumptions.xlsx)).

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

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

#### [Add new receivable lease(s)](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) (if applicable) – this process involves two wizards

Complete Create Receivable Lease wizard

Attach copy of receivable contract

Complete Receivable Review wizard

Notify the tenant agency when the receivable lease has been created so they can 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://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](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Condition%20Assessment%20Score.pdf) in the leased facility table is populated

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)

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

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

Add annual [operating costs](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Operating%20Costs%20-%20Facility.pdf) for fiscal year 2022 (use 2021 actual costs as an estimate

for 2022 costs). **Enter 2022 in the Fiscal Year field**. If actuals are not available, use

OFM’s [estimated operating expenses](https://ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2023-2029/2022OperatingExpenseAssumptions.xlsx).

Attach copy of lease contract in the lease contract table

##### Complete the Lease Review wizard

Enter the required data in the lease contract table

Add at least one lease payment series

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

Add lease option, if applicable

##### [Add new receivable lease(s)](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) (if applicable) – this process involves two wizards

Complete the Create Receivable Lease wizard

Attach copy of receivable contract in the facility receivable contract table

Complete Receivable Review wizard

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

make their required system updates.

### Receivable Leased Facilities (Tenant Agency)

Add/update [workstation and occupancy data](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Report%20Workstation%20and%20Occupancy%20Data.pdf)

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

### 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%20Assessment%20Score.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.

##### [Add new receivable lease(s)](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) (if applicable) – this process involves two wizards

Complete the Create Receivable Lease wizard.

Attach copy of receivable contract in the facility receivable contract table.

Complete Receivable Review wizard.

### 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) – the process involves two wizards

##### Complete the Create Leased Facility wizard

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

###### 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

##### Complete the Lease Review wizard

Enter the required data in the lease contract table.

Add at least one lease payment series.

Add Amortized Tenant Improvement cost (if applicable) as a payment.

Add lease option, if applicable.

##### [Add new receivable lease(s)](https://ofm.wa.gov/sites/default/files/public/itsystems/FPMT/Create%20Receivable%20Lease%20-%20Facility.pdf) (if applicable) – this process involves two wizards

Complete the Create Receivable Lease wizard.

Attach copy of receivable contract in the facility receivable contract table.

Complete Receivable Review wizard.

# 4. 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.

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.

# 5. Submit Data

[Notify OFM](https://ofm.wa.gov/sites/default/files/public/facilities/SixYearPlan/2023-2029/FPMT%20Data%20Submission.pdf) when inventory and baseline data are complete via FPMT – do not submit data if your

agency has pending facilities that have not yet been approved by OFM.