This job aid includes step-by-step instructions for creating a new leased facility in FPMT.

As of April 2024, FPMT's accounting functionality and integration with the Agency Financial Reporting System (AFRS) have been removed. There is now one agency editor role, which has access to all wizards. Additionally, creating a new leased facility is now a single-step wizard process.

Contents

Overview

Where do I access the Create Leased Facility wizard?	• The Create Leased Facility wizard is accessed via the menu button on the agency tile.
When should I enter a new leased facility?	• New leased facilities should be entered into FPMT no earlier than 30 days before, and no later than 30 days after, the lease contract start date.
What counts as a lease?	• A contract where the primary purpose is to grant use of a property during a specific period. The contract may be in a traditional lease form or may take other forms, including but not limited to, a sublease from a private sector entity, a resource sharing agreement (RSA), a memorandum of understanding (MOU), an interagency agreement with a local or federal government (IAA), or a federal license. • All facility leases, including agreements with no exchange of money (i.e., $0), must be entered into FPMT. • For subleases where a state agency is the lessor, refer to the Create Receivable Lease job aid.

What information do I need to create a new leased facility?	• A copy of the lease contract.
	• If you are creating a new facility:
	  ○ Parcel Number
	  ○ Legislative District

What is the difference between creating a new facility and creating a new leased facility?	• Facilities and leased facilities are two separate tables in FPMT. A leased facility table must be associated with a facility. • The facility table captures static information about the building, such as the address, map coordinates, parcel number etc. The leased facility captures information about the tenant agency and the condition of the leased space. • As part of the wizard process, you will have the option to create a new facility or link to an existing facility. • Always search FPMT before creating a new facility to ensure that the building 1) is not occupied by another agency or 2) was not previously obligated to the state.
If I need to create a new facility, how do I get the unique facility identifier (UFI) into HRMS?	• Make sure to select “yes” for the HRMS field in the facility table. • The UFI will be uploaded to HRMS after the new facility record has been reviewed for accuracy and approved by OFM. • Refer to the UFI Frequently Asked Questions for more information.
Why should I use the wizard?	• Users no longer have permissions to edit tables manually and must use the wizard to create a leased facility. • The wizard simplifies the leased facility creation process by guiding you through each step and automating some steps behind the scenes. • The wizard also includes business rules, or validation checks, to prevent incomplete data and common data entry errors.

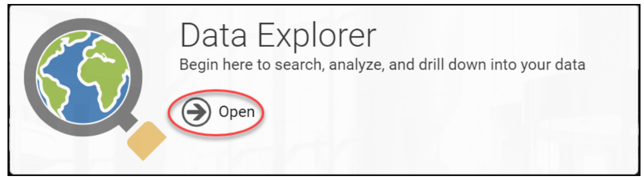
Wizard basics:

- The wizard opens in a new window, which will close when you complete the leased facility creation process. Once the window closes, you will need to refresh your original FPMT window to see all of the changes.
- Once you Save and Close, you cannot go back into the wizard.
- Make sure to allow enough time to complete the wizard process in one sitting. If you time out during the process, you will lose your data.
- You must go all the way through the wizard to the Data Review section and select the last Save and Close button to complete the wizard and save your changes to the database. If you exit out of the wizard before this step, you will lose your data.

Search for the Facility

Always search for the facility to ensure it's not already part of the inventory.

1. **Open** the Data Explorer module.

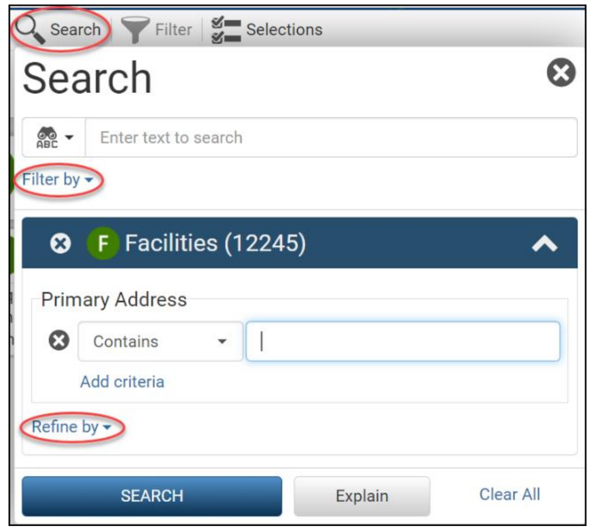


2. **Select** the Search button on the data explorer tool bar.
3. **Select** Filter by and choose **Facilities**.
4. **Select** Refine by and choose **Primary Address**.
5. **Enter** the street address.

   ➔Be aware that the system will not recognize abbreviations and full street names as the same word (e.g., St vs. Street).

   ➔Start with the abbreviation. If you don't find the facility, repeat the search with the full name.
6. **Select** SEARCH

➔If the facility already exists in the inventory, you will link to it as part of the wizard process instead of creating a new location.



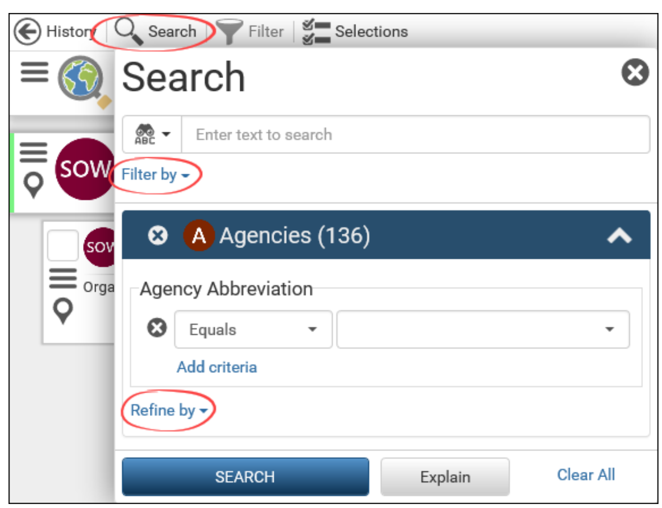
Launch the Leased Facility Creation Wizard

Navigate to the agency tile and launch the leased facility creation wizard.

1. **Select** the Search button on the data explorer tool bar.

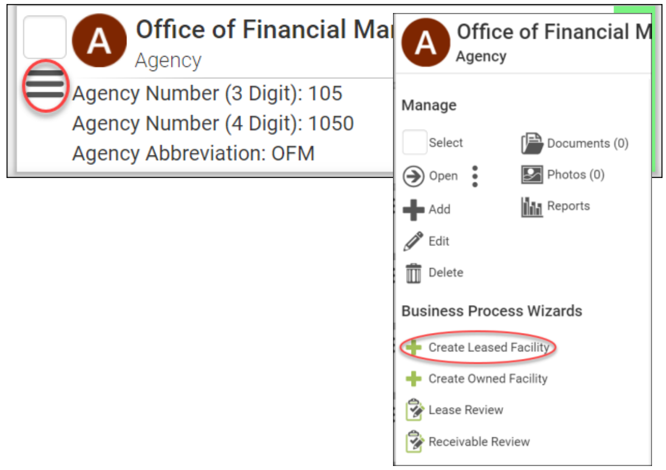
   ➔If you are doing this search immediately after the above search, select Clear All before continuing on to step 2.
2. **Select** Filter by and choose **Agencies**.
3. **Select** Refine by and choose **Agency Abbreviation**.
4. **Enter** the abbreviation.

   ➔These are SAAM acronyms.
5. **Select** SEARCH



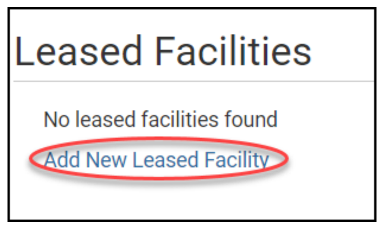
2. **Select** the menu button on the agency tile.
3. **Select** Create Leased Facility.

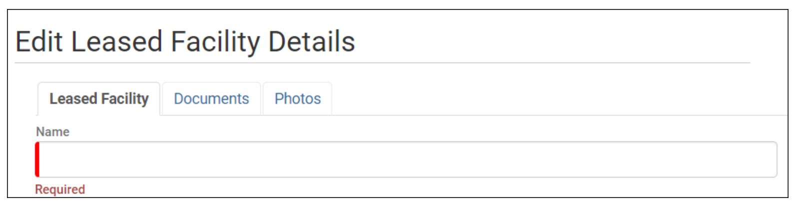
➔You will have the opportunity to add documents and photos to each table as you move through the wizard.

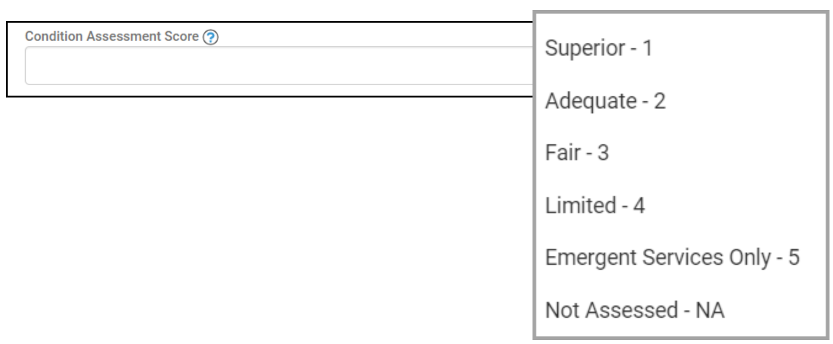


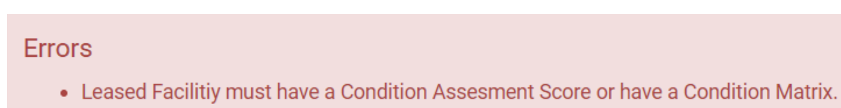
Add a New Leased Facility

1. **Select** Add New Leased Facility
2. **Enter** agency data. Red fields are system required. Other required fields are noted in this job aid.
   ➔Additional guidance is available by selecting the information icon next to the field name.
   - Name
     ➔Agency SAAM acronym – Agency common name
     (e.g., ES – Yakima Worksource)
   - Condition Assessment Score
     ➔This is a required field for all facilities (1-5 or NA).
     ➔The [Condition Matrix]() table, which is available later in the wizard, is an optional way to populate this score.
     ➔If you skip this field and the matrix, you will receive an error.
   - Six-Year Facilities Plan
     ➔Ensure this field is marked "yes" if this leased facility is in scope for the [Six-Year Facilities Plan](). Otherwise, select "no."
3. **Select** Next





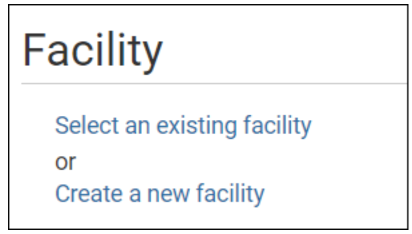




Facility – Add New or Link to Existing

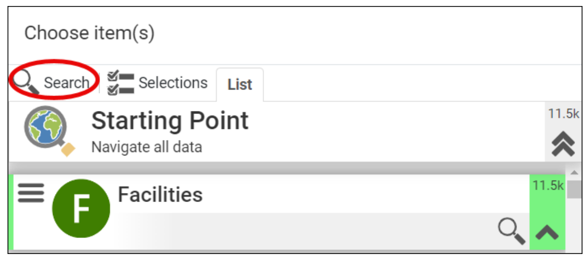
➔If you located an existing facility in your initial search, choose **Select an existing facility**.

➔If you did not find an existing facility, choose Create a new facility.



Link to an Existing Facility

1. **Select** the Search button to locate an existing facility.

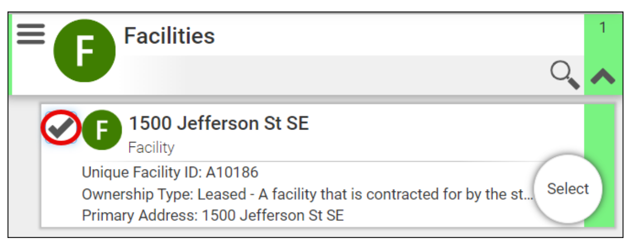


2. **Enter** the primary address in the search box using quotation marks.

   ➔You can also use the UFI.

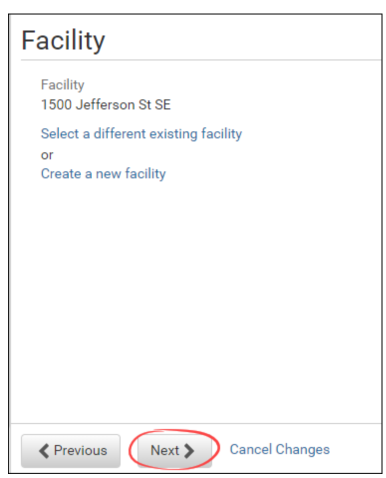
3. **Select** SEARCH

4. **Select** the checkbox next to the facility.
5. **Select** DONE



➔Your new leased facility is now associated with an existing facility record.

➔If you need to make a change, you can either **Select a different existing facility** or **Create a new facility**.



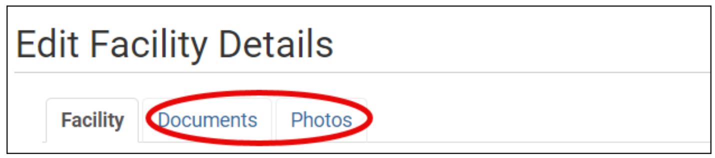
➔Once you have the correct facility, select Next ❯

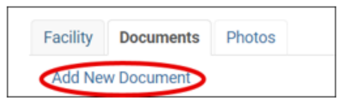
➔Click/tap [here] to skip the new facility instructions and continue on to adding a new space.

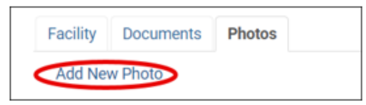
Add a New Facility

➔You can upload documents and photos to the Facility table here. Do not upload a copy of the lease until reaching the lease contract table later in the wizard.

- **Select** Documents or Photos.
- **Select** Add New Document or Add New Photo.
- Browse for, or drag and drop, your file(s).
- **Select** CLOSE.







1. **Enter** agency data. Red fields are required.

   ➔Additional guidance is available by selecting the information icon ?

   - Name

     ➔Use the primary address. If the facility address is not unique, include a building number. (e.g., 1313 N 13th Ave – BLDG 1W165000)

   - Primary address

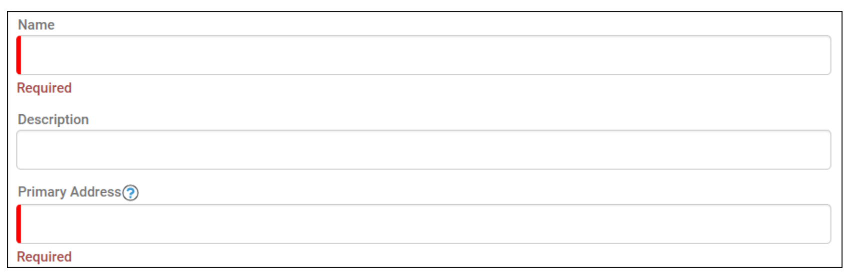
     ➔This is the legal address.

     ➔Abbreviate the directional and street suffix per [USPS Addressing Standards]. (e.g., 123 S Main St)

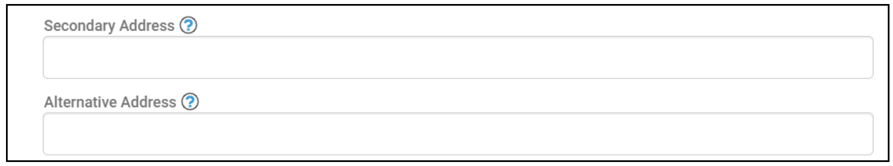
     ➔The system will require a secondary address if a facility with the same primary address already exists.

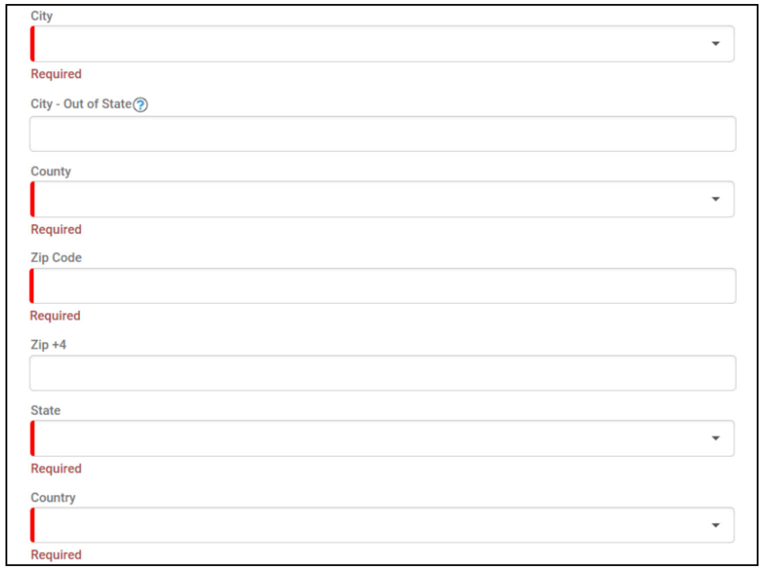
     ➔The system will only catch duplicate addresses if they are entered exactly the same. If you are entering multiple facilities with the same primary address, make sure to use the same formatting.

     (e.g., Jefferson St)



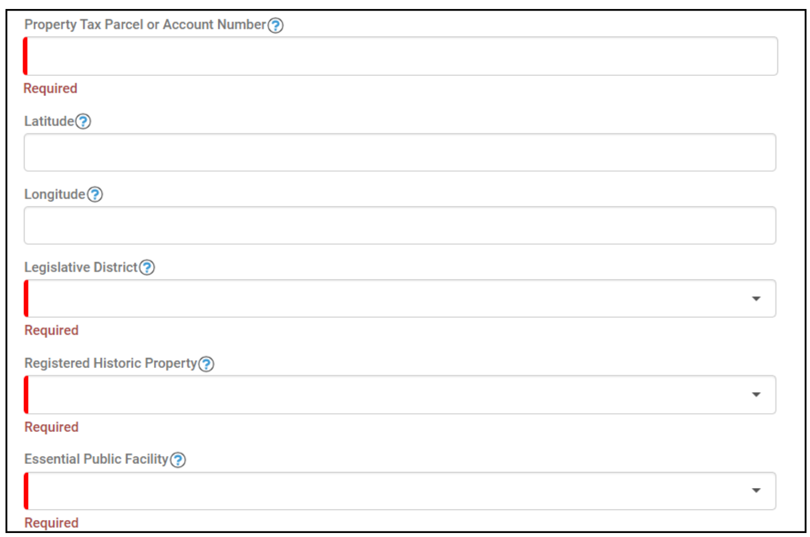
- Secondary Address
  ➔A secondary designator, such as a building number or name.
- Alternative Address
  ➔ Only populate this field if the facility has an address other than the legal address, for example a different mailing address.





- City – Out of State
  ➔ If the facility is located outside of Washington State, select Out of State at the bottom of the dropdown list on the City, County and Legislative District fields. Enter the city in the City – Out of State field.

- Property Tax Parcel or Account Number
  ➔This information can be found on the county assessor's website.
  ➔If there is no parcel number for this facility or it is located out of state, enter N/A.
- Latitude & Longitude (required)
  ➔FPMT will automatically populate this data after you geocode the facility.
- Legislative District
  ➔ Based on location of the facility. You can locate the legislative district on the Legislature's website.
- Registered Historic Property
  ➔If unsure, refer to the Department of Archaeology and Historic Preservation for more information
- Essential Public Facility
  ➔Essential public facility refers to public facilities that are typically hard to site and critical to state government. Refer to WAC 365.196.550, RCW 36.70A.200, RCW 47.06.140 or RCW 71.09.020.



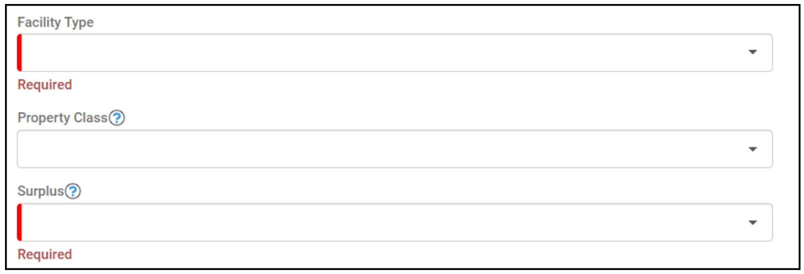
- Facility Type (Building or Structure) – **only buildings are included in the facilities inventory**

  ➔A building is a facility with at least one wall, a roof and permanent foundation, regardless of occupancy.

  ➔A stucture is a real property improvement constructed on or in the land, which is not a building.
- Property Class

  ➔Auto-populated based on the primary space type with the most square feet in the Space table.
- Surplus

  ➔Select "yes" if the facility is no longer needed by the agency and can be surplused.



- Campus

  ➔ Is this facility part of a campus? (Yes/No)
- Campus Identification Number

  ➔As defined in the Energy Star Portfolio Management System. The format should be the agency SAAM number and campus ID (e.g., 405-0123).
- Conditioned Space

  ➔Select Yes if the facility meets the criteria for conditioned space as defined by the Washington State Energy Code. This code defines conditioned space as any facility which has a room or area that is being heated or cooled, containing uninsulated ducts or with a fixed opening directly into adjacent conditioned space.

➔Populate the following fields with the corresponding value from the Energy Star Portfolio Management System.

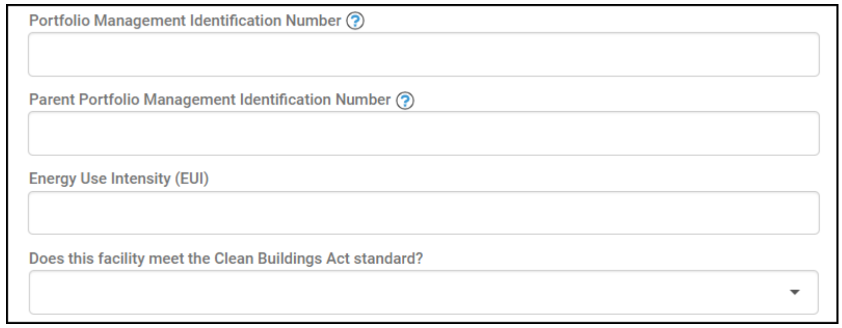
- Portfolio Management Identification Number
- Parent Portfolio Management Identification Number
- Energy Use Intensity (EUI)

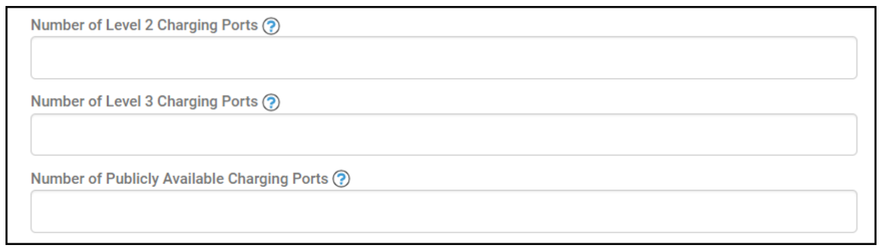
➔Refer to the Department of Commerce's website for more information on Clean Buildings Act compliance criteria.

- Does this facility meet the Clean Buildings Act standard? (Yes/No)

➔Click the information icon ? for electric vehicle charging port definitions.

- Number of Level 2 Charging Ports
- Number of Level 3 Charging Ports
- Number of Publicly Available Charging Ports



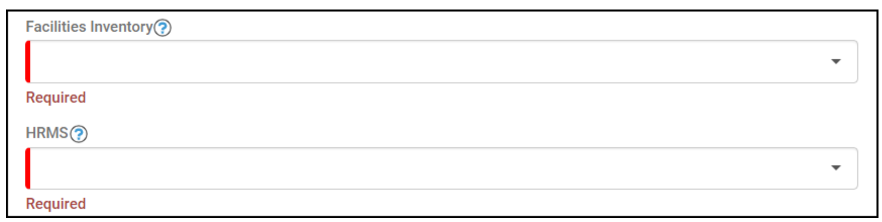


- Facilities Inventory

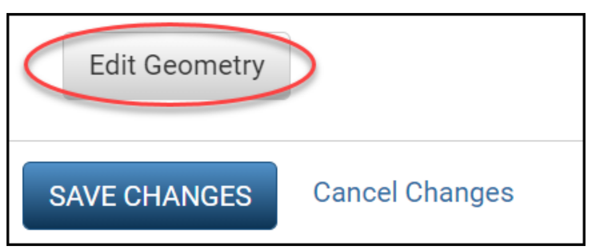
  ➔ Select "yes" if the facility is a building with at least one wall, a roof and a permanent foundation, regardless of occupancy.
- HRMS

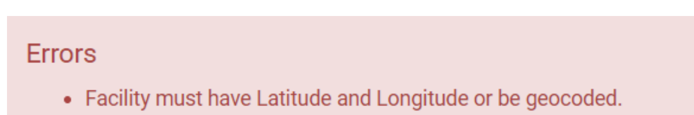
  ➔ Select "yes" if the facility serves as a duty station for employees.
- OFM Validation Date

  ➔All new facilities are saved in pending approval status. OFM must review key data for accuracy and will change the status of the facility to "approved" and populate the OFM validation date.

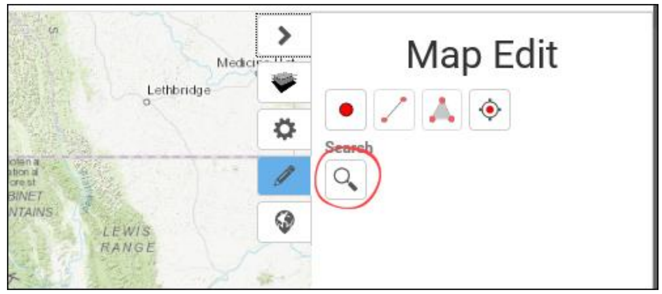


2. **Select** Edit Geometry to geocode your facility (place a point on the map).
   ➔You must geocode the facility or manually populate the coordinates.
   ➔You will receive an error if you skip this step.

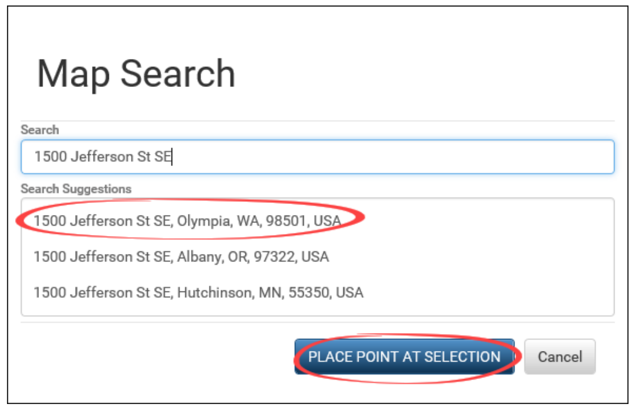




3. **Select** the search button.

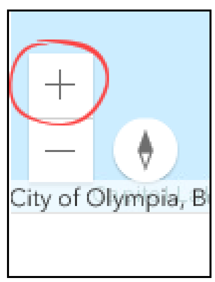


4. **Enter** the street address – the system will populate addresses in the dropdown menu.
5. **Select** the appropriate address.
6. **Select** Place Point at Selection



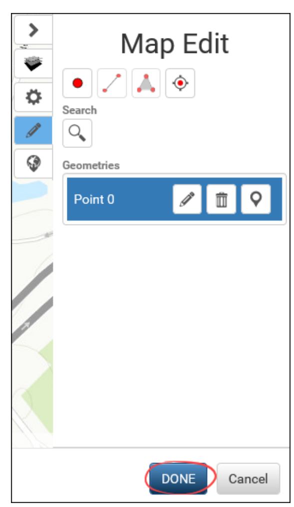
7. **Select** the button to zoom in on the map.

   ➔A black dot will appear at the specified address.

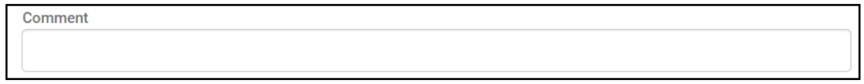


8. If the point is in a road, you will need to move it so it is on the actual facility.
   - A. **Select** the dot – it will become blue, and it will be highlighted.
   - B. **Move** the dot to the approximate center of the building.
   - C. **Click/tap** anywhere on the map when you're finished. The dot will be blue and no longer highlighted.
9. **Select** Done.

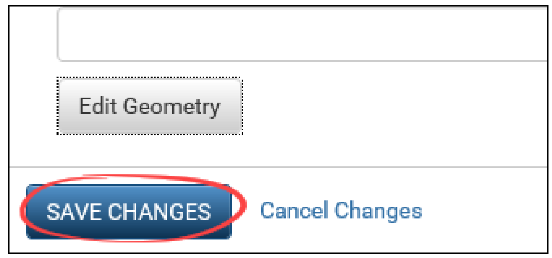
   ➔Once you save your changes, the dot will be black if you go back into the map editor.



➔In the event that a building shape does not exist yet at the address you have entered, do your best to approximate the location and add a comment.

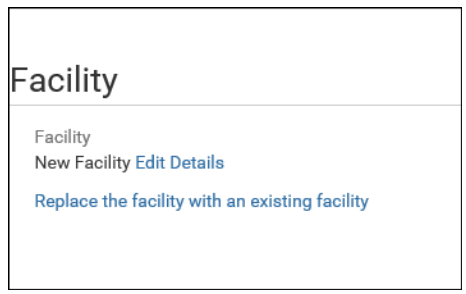


10. Select SAVE CHANGES



➔Your new leased facility is now associated with a new facility record.

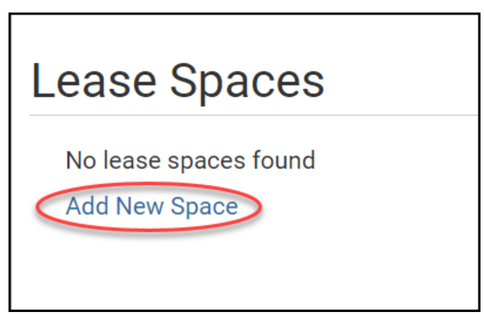
➔If you need to make a change, you can either **Edit Details** for your new facility or **Replace the facility with an existing facility**.



11. Select Next ›

Add a New Space

1. **Select** Add New Space



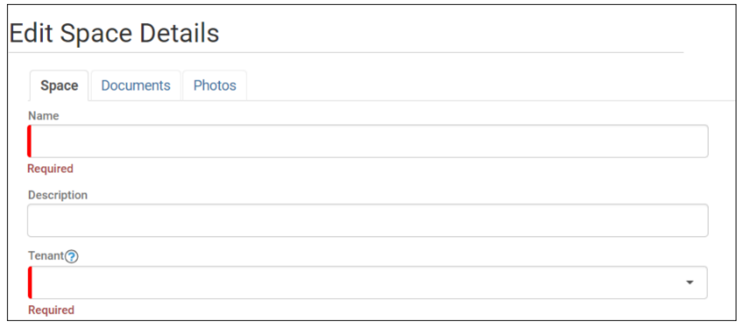
2. **Enter** agency data. Red fields are required.

➔Select the information ⓘ icon for additional guidance about fields.

- Name

➔ Tenant agency SAAM acronym – Agency assigned common name (e.g., ES – Yakima Worksource)

- Tenant

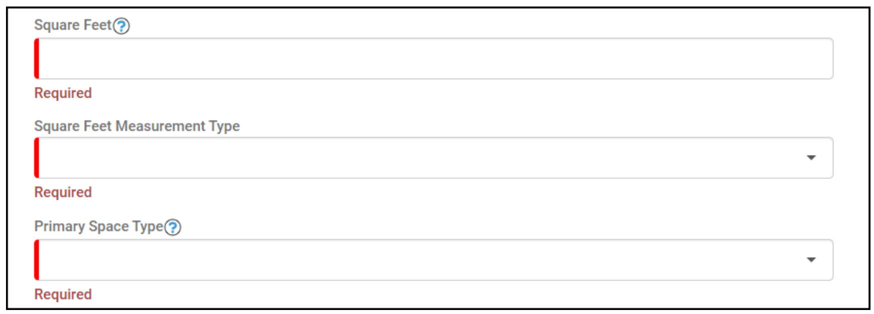


- Square Feet

➔The sum of all space square feet cannot exceed the total square feet in the lease contract.

- Square Feet Measurement Type (dropdown)
- Primary Space Type (dropdown)

➔Refer to the Property Class & Space Type Categories job aid for additional information.



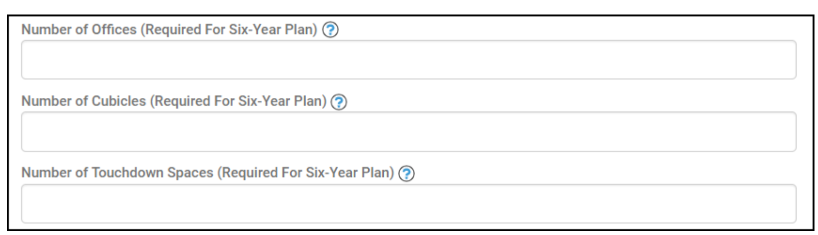
- If part of your new space is available for use by another agency, refer to the Available Space job aid for details on how to populate the additional fields for potential collocation.

➔If Available Space is marked “yes,” you must populate the **Annual Full Service Rate per Square Foot** and **Available Occupancy Date** fields.

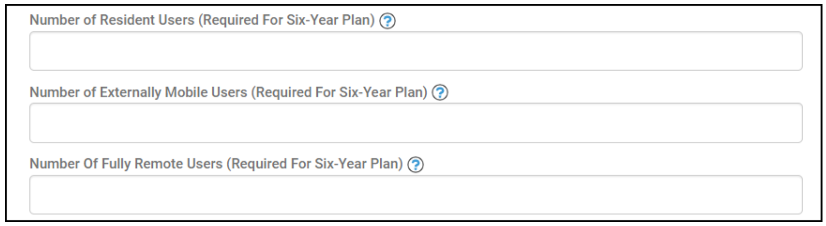
➔If this leased facility is in scope for the Six-Year Facilities Plan, you must populate the following additional fields:

- Number of Offices
- Number of Cubicles
- Number of Touchdown Spaces

➔Refer to any unassigned workspace (office, cube, bench etc.) that could be used for hoteling as a touchdown space.

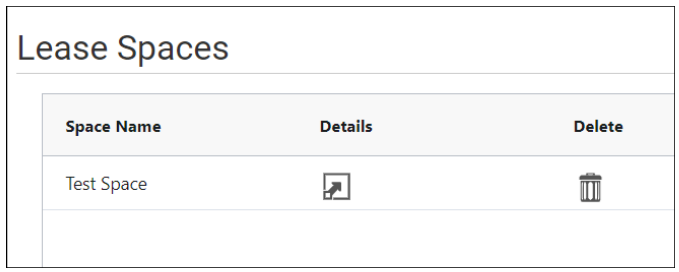


➔OFM will populate user count fields from HRMS data via import.



3. **Select** SAVE CHANGES

➔Once the new space is saved, you can update the information by selecting the details icon or delete the space by selecting the trash can.



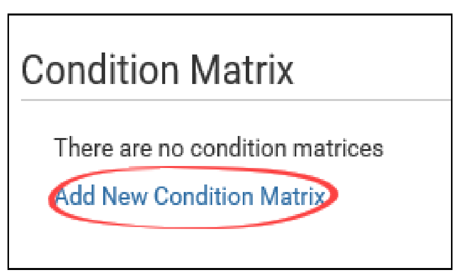
4. Navigate to the next needed form.
   - The operating costs table is no longer required. OFM will apply a proxy instead.
   - To skip operating costs and add a condition matrix, select Next twice.

   ➔A condition assessment score is required for all facilities in the inventory. The condition matrix is an optional way to populate that score. Refer to the condition matrix job aid for more details.
   - To skip operating costs and condition matrix, select Next twice and then select SAVE CHANGES.

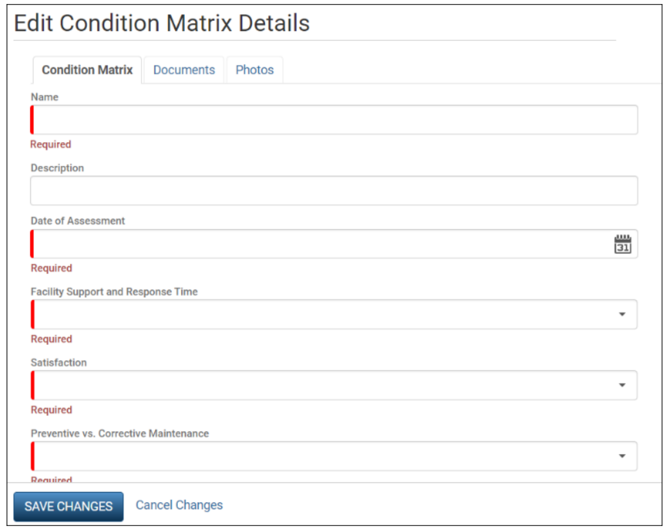
   ➔To skip ahead to the lease contract instructions, click/tap here.

Add a Condition Matrix

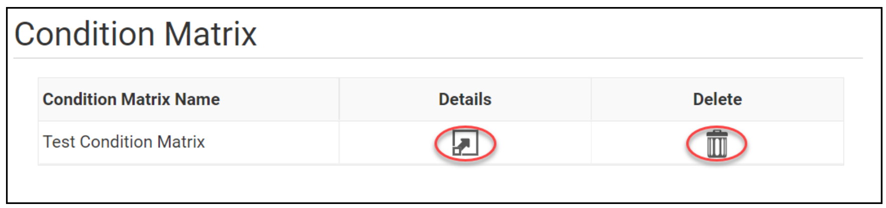
1. **Select** Add New Condition Matrix



2. **Enter** data. Red fields are required.
   ➔Refer to the [Condition Matrix]() job aid for more information.
3. **Select** SAVE CHANGES

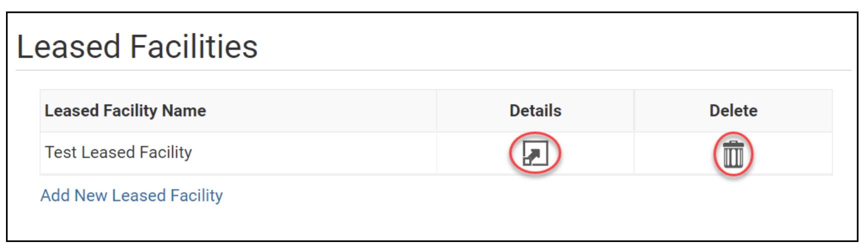


➔Once the condition matrix is saved, you can update the information by selecting the details icon or delete it by selecting the trash can.



4. **Select** SAVE CHANGES

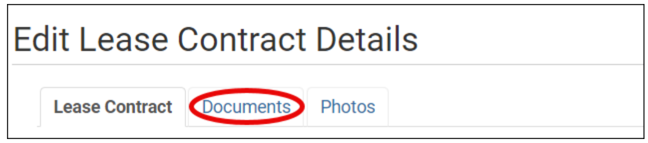
➔If you need to edit any of the data you have previously entered, select the details icon. To delete all of the data that you have previously entered, select the trash can.

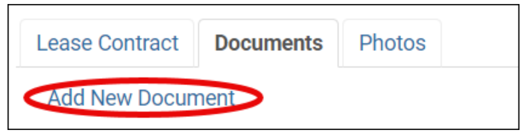


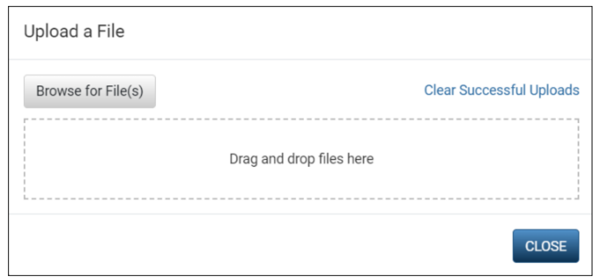
5. **Select** Next ›

Add a Lease Contract

1. **Upload** a copy of the lease contract.
   - **Select** Documents.
   - **Select** Add New Document.
   - Browse for, or drag and drop, your file.
   - **Select** CLOSE.







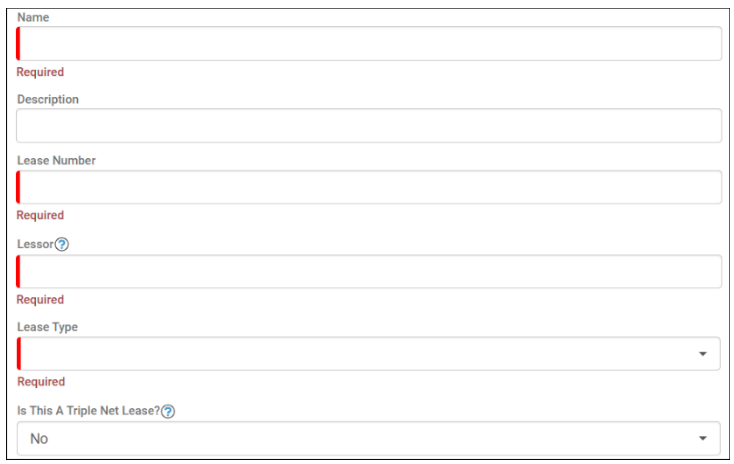
2. **Enter** agency data. Red fields are required.
   - Name

     ➔Use the lease number
   - Lease Number

     ➔Lease numbers must be unique; they cannot be used for more than one record.
   - Lessor
   - Lease Type

     ➔Dropdown menu
   - Is This A Triple Net Lease?

     ➔Defaulted to No. Change to Yes if it's a triple net lease.

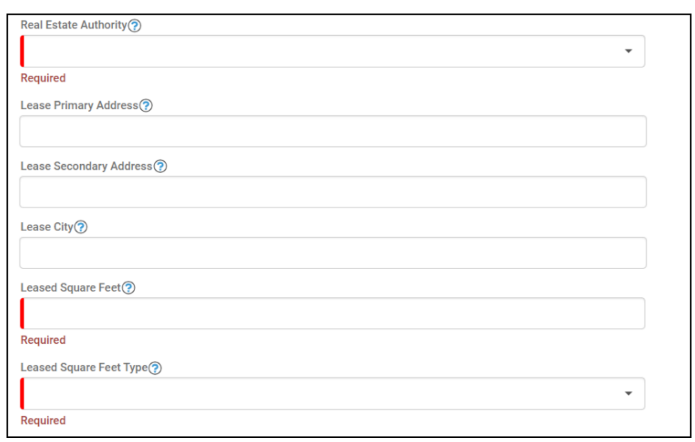


Triple net lease, triple net, or NNN, is a type of commercial real estate lease where the tenant or lessee pays the full expenses of the property.

   - Real Estate Authority

     ➔Dropdown menu
   - Lease Primary Address
   - Lease Secondary Address
   - Lease City
   - Leased Square Feet

     ➔Make sure the square feet in your space table matches the square feet in your lease contract.
   - Leased Square Feet Type (dropdown)



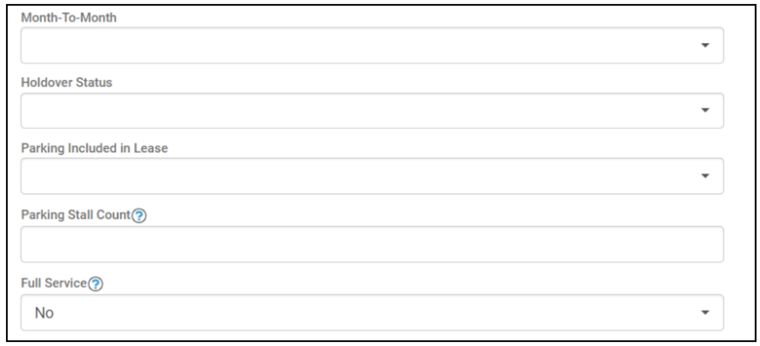
- Month-To-Month

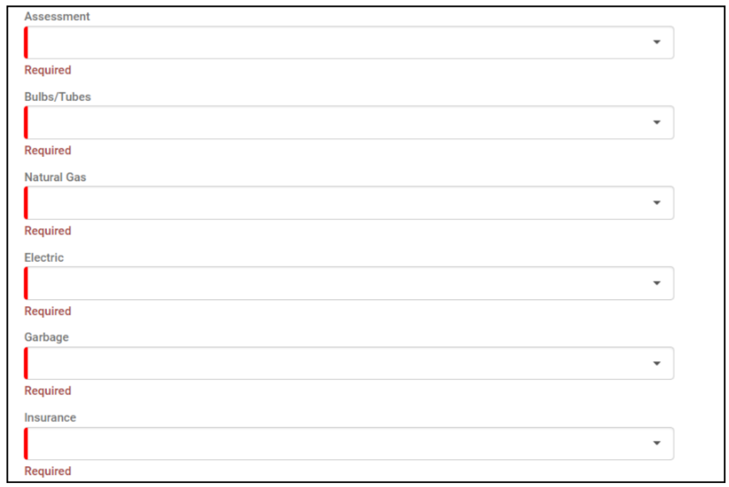
  ➔Select “yes” if this is a month-to-month lease. If there is no specific end date, enter an end date one year out from the start date.
- Full Service (required)

  ➔Defaulted to “No” for new leased facilities.

  ➔Update field to “Yes” if the lease is fully serviced. This will auto-populate most operating cost fields to “lessor paid”
- Operating Cost Fields

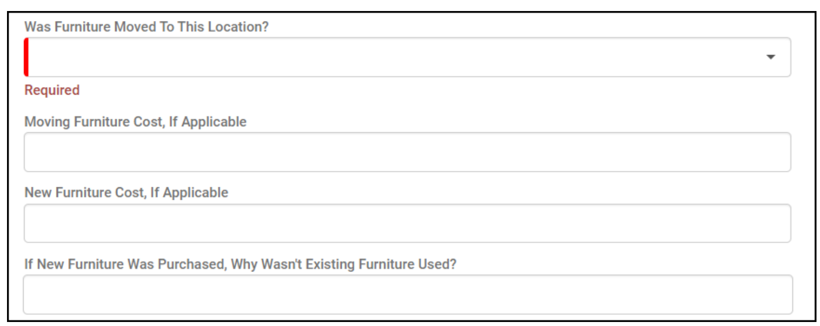
  ➔Dropdown fields – select lessor or lessee paid. If a cost is not applicable, select N/A.





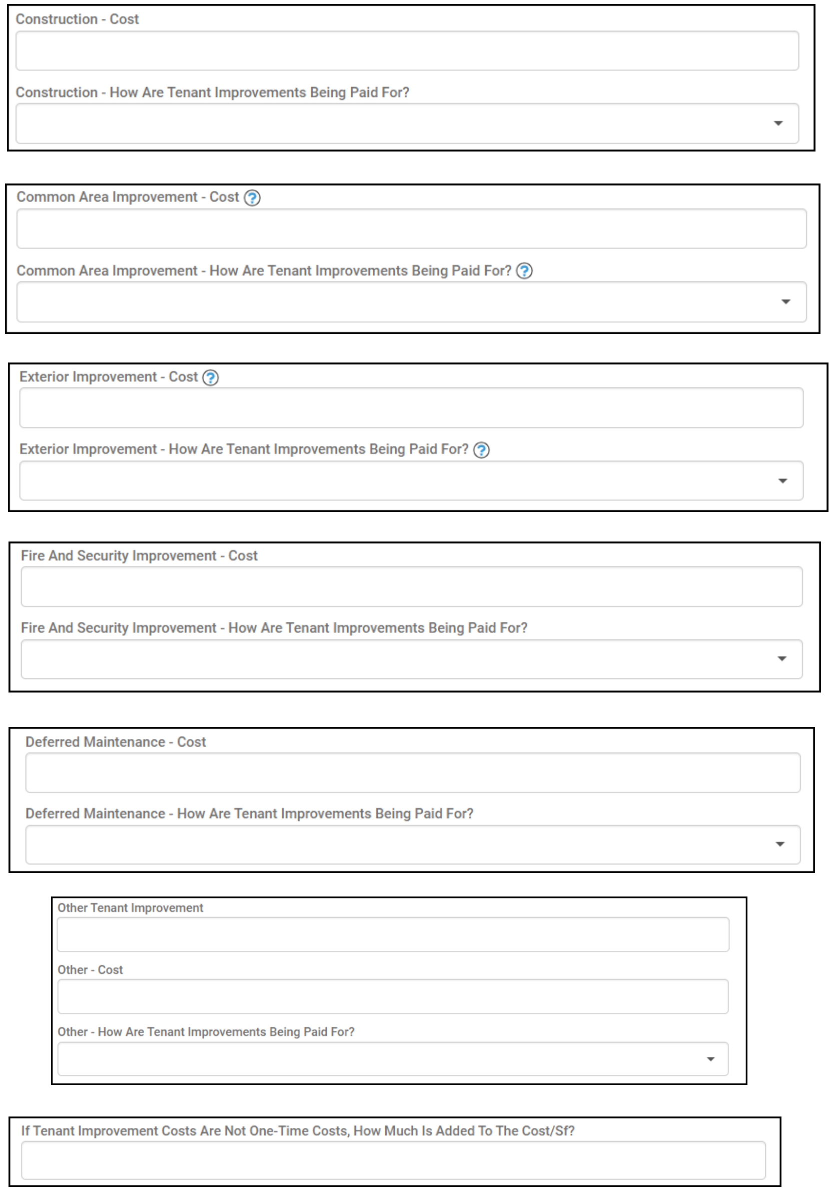
➔The following fields only apply to office spaces that are in scope for the Six-Year Facilities Plan.
➔If any of these fields are relevant to your location and you do not have actuals, enter an estimate. Do not leave the cost fields blank. When actuals are available, update the record.
➔If you select Yes for the required fields, additional fields become required.

- Was furniture moved to this location?
- Moving furniture cost, if applicable
- New furniture cost, if applicable
- If new furniture was purchased, why wasn’t existing furniture used?
- Were staff moved to this location?
- Staff moving cost, if applicable
- Are there tenant improvement (TI) costs?



➔If any cost fields are populated, the associated fields become required.

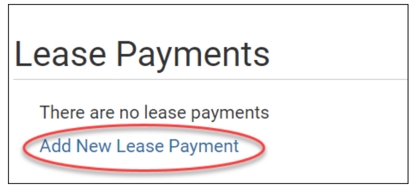
- Construction – Cost
- Construction – How are tenant improvements being paid for?
- Common Area Improvement – Cost
- Common Area Improvement – How are tenant improvements being paid for?
- Exterior Improvement – Cost
- Exterior Improvement – How are tenant improvements being paid for?
- Fire and Security Improvement – Cost
- Fire and Security Improvement – How are tenant improvements being paid for?
- Deferred Maintenance – Cost
- Deferred Maintenance – How are tenant improvements being paid for?
- Other Tenant Improvement
- Other – Cost
- Other – How are tenant improvements being paid for?
- If tenant improvement costs are not one-time costs, how much is added to the cost/SF?



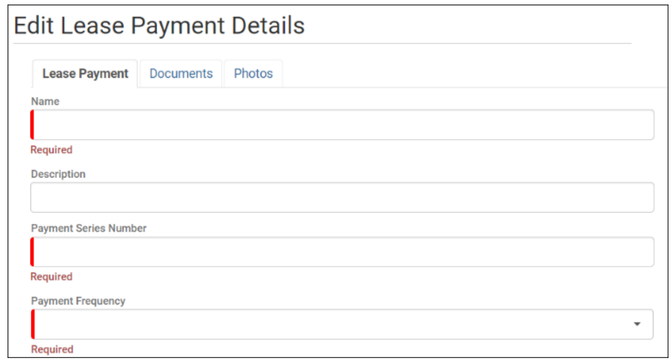
3. Select Next

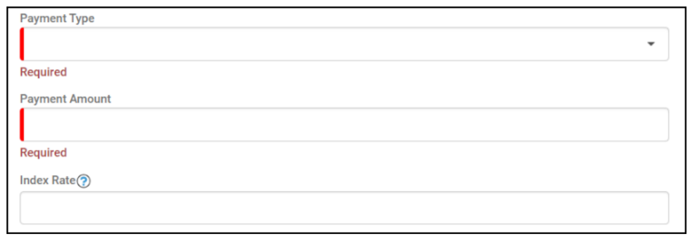
Add a Lease Payment

1. **Select** Add New Lease Payment



2. **Enter** agency data. Red fields are system required.
   - Name
     ➔Payment Type – Series Number (e.g., Base Rent – 1)
   - Payment Series Number
     ➔Use sequential numbers for the series (e.g., 1, 2, 3)
   - Payment Frequency
     ➔Dropdown Menu
   - Payment Type
     ➔Dropdown Menu
   - Payment Amount
   - Index Rate
     ➔Required if payment type is Indexed Payment
   - Payment Start Date
   - Payment End Date





3. Select SAVE CHANGES

You now have the option to edit your payment by selecting the Details icon or delete it by selecting the trash can.

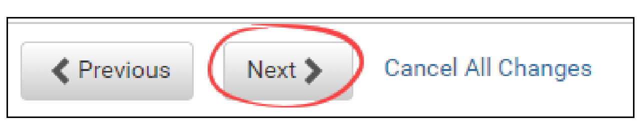
Repeat this process if there is more than one payment series.

➔You must enter a series for each time the rent amount changes.

➔If there is no base rent, or if you are receiving free rent for a portion of the lease term, enter a payment for $0.

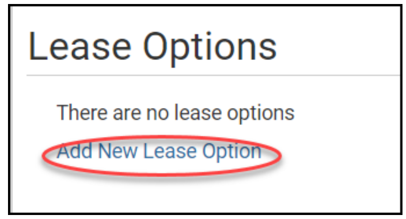
➔If there is amortized tenant improvement costs associated with this leased facility, you would enter those costs as a lease payment series.

4. **Select** Next >

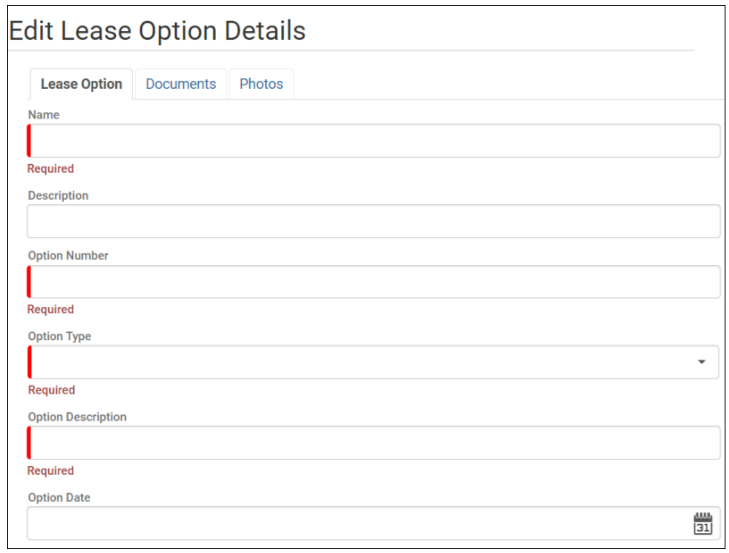


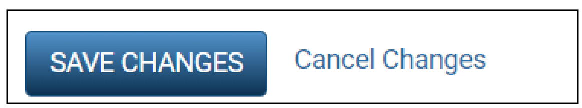
Add a Lease Option (if applicable)

1. **Select** Add New Lease Option, if applicable.



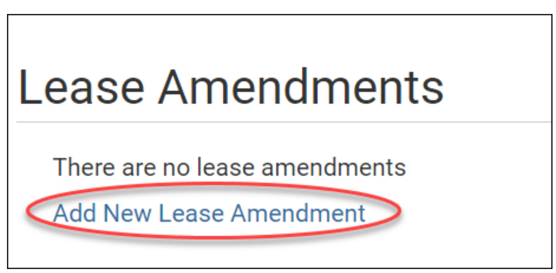
2. **Enter** agency data. Red fields are required.
   - Name
     ➔Use Option Type – Option Number (e.g., Cancel – 1)
   - Option Number
     ➔Options should be numbered sequentially (e.g., 1, 2, 3)
   - Option Type
     ➔Dropdown menu
   - Option Description
     ➔Provide a brief desciption of the clause
   - Option Date
3. **Select** SAVE CHANGES
4. **Select** Next





Add a Lease Amendment (if applicable)

1. **Select** Add New Lease Amendment, if applicable.
   ➔Upload a copy of the amendment before saving your changes.



2. **Enter** agency data. Red fields are required.

   ➔Refer to the [amendments job aid](#) for more details.

   - Name

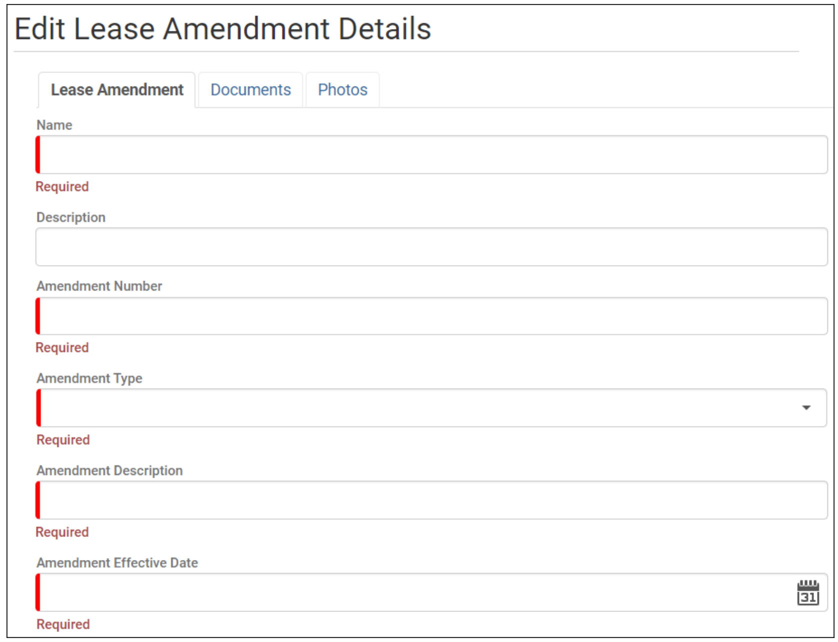
     ➔Use Amendment Type – Amendment Number (e.g., Extension – 1)
   - Amendment Number

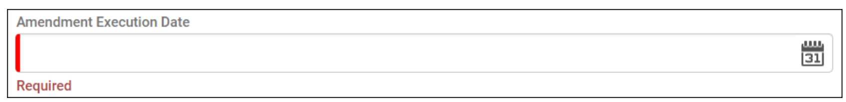
     ➔Amendments should be numbered sequentially (e.g., 1, 2)
   - Amendment Type

     ➔Dropdown menu
   - Amendment Description

     ➔Provide a brief desciption of the amendment
   - Amendment Effective Date
   - Amendment Execution Date

     ➔The date the last party signed.

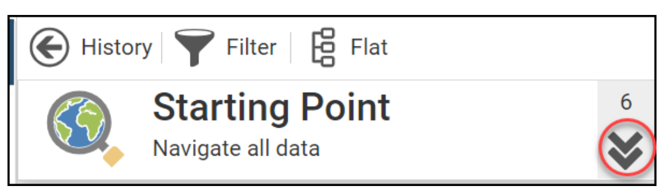




3. **Select** SAVE CHANGES
4. Most amendments require updates to other tables in FPMT. Additionally, a copy of the amendment must be attached in FPMT for all amendments. Refer to the [Amendments job aid](#) for instructions.

Review Your Data

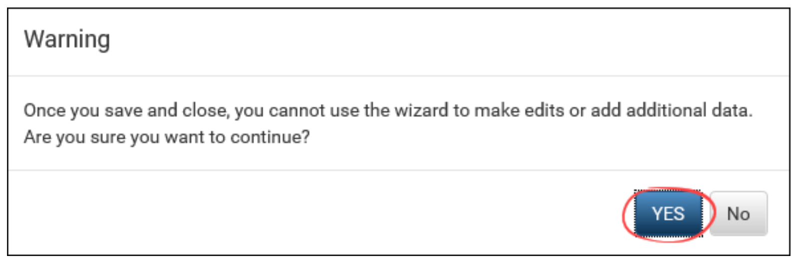
1. **Select** the Hierarchy button to change to the Flat view. You can now see all of the tables you have added or edited as part of the wizard process.
2. **Select** the arrows on the Starting Point tile to expand all of the tiles below.



3. **Select** View on each tile to see the data you have entered.
4. **Review** your data.

➔To edit your data, use the Previous button to navigate back to an earlier screen.

5. **Select** SAVE AND CLOSE to complete the wizard.
6. You will see a warning that lets you know you can't go back into the wizard after saving and closing. If you don't need to make any additional edits, select YES.



➔When you complete the wizard, the window will automatically close. FPMT will still be open in the original window. You will need to refresh your screen in order to see your changes.