



This job aid provides step-by-step instructions for using FPMT's lease renewal wizard to renew a master lease contract with an associated receivable lease.

As of April 2024, FPMT's accounting functionality and integration with the Agency Financial Reporting System (AFRS) have been removed. There is now only one agency editor role, which has access to all wizards.

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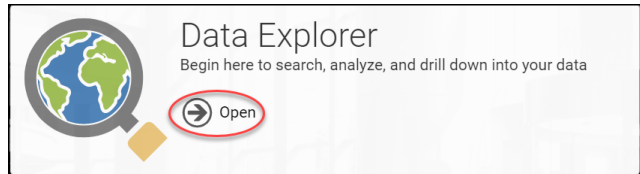
Overview



<p>Where do I access the renewal wizard?</p>	<ul style="list-style-type: none"> The renewal wizard is accessed via the menu button on the expiring master lease contract tile.
<p>When should I renew a master lease?</p>	<ul style="list-style-type: none"> Master leases should be renewed no later than 30 days after the new lease start date. When you renew a master lease, you will need to renew the associated receivable lease(s) at the same time, otherwise the receivable lease(s) will automatically become inactive when you save and close the renewal.
<p>What information do I need to renew a master lease?</p>	<ul style="list-style-type: none"> A copy of the new master lease contract and the new receivable lease contract(s). The expiring master lease contract number. <ul style="list-style-type: none"> If you need to locate a lease number, you can run a Lease Contract Inventory Report from the agency tile in FPMT. If this is a renewal of office space that is in scope for the Six-Year Facilities Plan, populate the tenant improvement one-time cost fields in the lease contract table, if applicable. If actuals are not available, use an estimate and update the system when you have actuals. For receivable leases, reporting the tenant improvement one-time costs is the responsibility of the lessee (tenant) agency. Tenant agencies will report this data via the Receivable Review wizard after the contract has been renewed in FPMT.
<p>Why should I use the wizard?</p>	<ul style="list-style-type: none"> Users can no longer manually edit data in FPMT and must use the wizards to renew lease contracts. The wizard simplifies the renewal process by guiding you through each step and reducing manual activity in the system. The wizard also includes business rules, or validation checks, to prevent incomplete data and common data entry errors.
<p>Wizard basics:</p> <ul style="list-style-type: none"> The wizard opens in a new window, which will close when you complete the renewal. Once the renewal window closes, you will need to refresh your original FPMT window to see all of the changes. Once you Save and Close the renewal, you cannot go back into the wizard. Make sure to allow enough time to complete the renewal process in one sitting. If you time out during the renewal process, <u>you will lose your data.</u> You navigate through the wizard, by clicking the Next or Previous buttons. 	

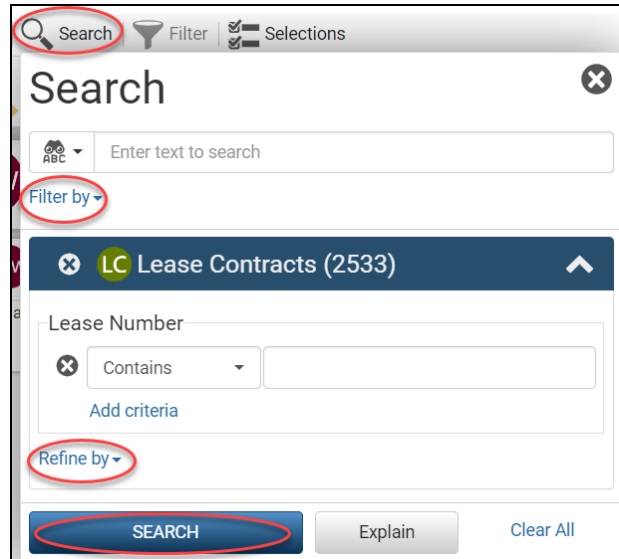
Launch the Lease Renewal Wizard



Navigate to the expiring master lease contract and launch the lease renewal wizard.

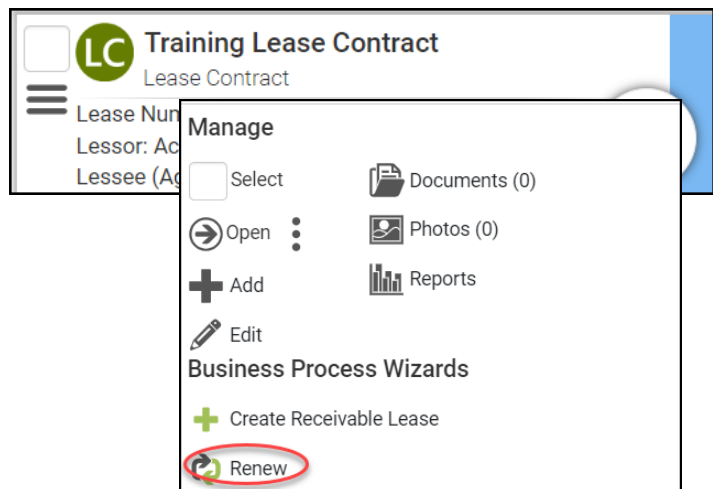
- 1. Open** the Data Explorer module.



- 2. Select** the  **Search** button on the data explorer tool bar.
- 3. Select** **Filter by** and choose **Lease Contracts**.
- 4. Select** **Refine by** and choose **Lease Number**.
- 5. Enter** the lease number for the expiring master lease contract.
→ If you need to locate the expiring lease contract number, run the Lease Contract Inventory Report available via the menu button on the agency tile.
- 6. Select** 



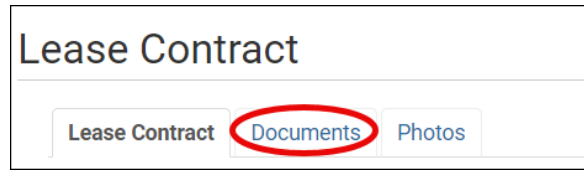
- 7. Select** the  menu button on the facility lease contract tile
- 8. Select**  **Renew**
→ FPMT will open the lease renewal wizard in a new window.
→ The system will automatically populate information from the existing lease. You may update this information if there are changes.



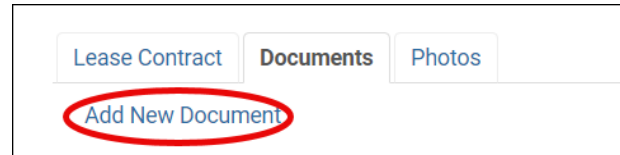
Renew the Master Lease

1. Upload a copy of the new contract.

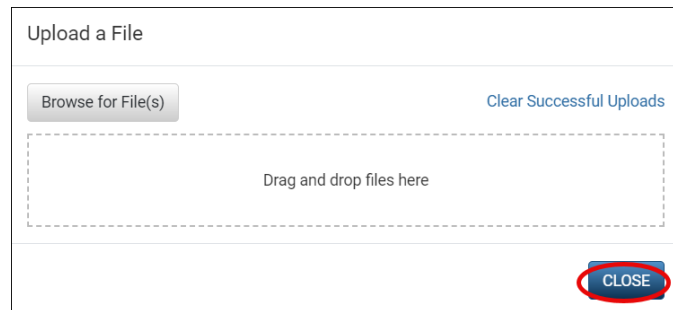
- Select Documents.
- Select Add New Document.
- Browse for, or drag and drop, your file.
- Select CLOSE.



Lease Contract **Documents** Photos



Lease Contract Documents Photos
Add New Document



Upload a File

Browse for File(s) Clear Successful Uploads

Drag and drop files here

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.
- Is this a triple net lease?
→ Defaulted to No. Update if applicable.
- Lease Executed Date
→ The date the last party signed.
- Lease Start Date
- Lease End Date



Name
Required

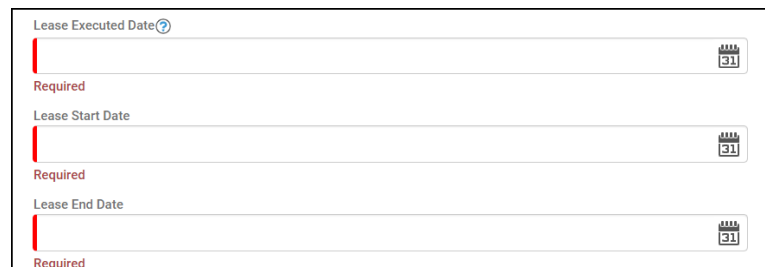
Description

Lease Number
Required



Is This A Triple Net Lease? ⓘ
No

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.



Lease Executed Date ⓘ
Required

Lease Start Date
Required

Lease End Date
Required



Master Lease and Receivable Lease Renewal - Facility Facilities Portfolio Management Tool (FPMT)

→ The following fields only apply to office spaces that are in scope for the Six-Year Facilities Plan. If your facility is out of scope, select No.

→ 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 red (system-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?

Was Furniture Moved To This Location?

Required

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?

Required

Staff Moving Cost, If Applicable

Are There Tenant Improvement (TI) Costs?

Required

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?

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?

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. Once you have completed the lease contract table, **select**

→ If you navigate away from the lease contract form before properly completing the table, you will receive an error message.

→ You cannot move forward until the error is fixed.

Note: This error will show up in every table if you try to save with missing/incorrect data or try to navigate away before properly completing the table. In addition to this error, you will see a message in pink with more detail.

Unable to move to next screen

Unable to move to next screen until all errors are resolved.

Errors

- One or more provided values are invalid.

→ In addition to validating that all required fields have been populated, the wizard will also ensure that the lease contract start date is a date prior to the lease contract end date.

Errors

- The lease contract start date must be prior to the lease contract end date.

Add a Lease Payment

1. Select Add New Lease Payment

→ You cannot save and close the renewal until you add at least one lease payment. If there is no base rent for the facility, enter a lease payment for \$0.

Lease Payments

There are no lease payments

2. Enter agency data. Red fields are required.

- Name
 - ➔Use payment type – payment series number (e.g., Base Rent - 1).
- Payment Series Number
 - ➔Use sequential numbers for payment series (1, 2, 3, etc.).
- Payment Frequency (dropdown)

- Payment Type (dropdown)
- Payment Amount
- Index Rate
 - ➔Index or rate used to determine payment amounts, such as CPI or Market Rate. Enter the rate that is in effect at lease commencement.

- Payment Start Date
- Payment End Date

3. Select SAVE CHANGES

➔The lease payment table features the following validation checks:

- All required fields must be completed.
- Index Rate is required if Payment Type is “Indexed Payment.”
- The lease payment start and end dates must fall within the parameters of the lease start and end dates.

➔The lease payment table cannot be saved until errors are corrected.

➔If you navigate away from the lease payment table before saving, you will receive an error.

Edit Lease Payment Details

Lease Payment Documents Photos

Name
Required

Description

Payment Series Number
Required

Payment Frequency
Required

Payment Type
Required

Payment Amount
Required

Index Rate ⓘ

Payment Start Date
Required

Payment End Date
Required

SAVE CHANGES Cancel Changes

Errors

- The lease payment index rate is required when the payment type is indexed payment.

Errors

- The lease payment start date must be on or after the lease contract start date of 11/1/2019.
- The lease payment end date must be on or before the lease contract end date of 10/31/2021.

Errors

- One lease payment is required.

→ Once the lease payment is saved, you can update the information by selecting the details icon or delete the payment by selecting the trash can.

→ Repeat this process if there is more than one lease payment series. All payments can have an Active status.

→ You must enter all lease payment series for the contract, even if the lease is being entered into FPMT retroactively.

Payment Name	Payment Series Number	Details	Delete
Base Rent-1	1		

[Add New Lease Payment](#)

→ Once you are done adding payments, select [Next >](#) to add a Space.


[← Previous](#)
[Next >](#)
[Cancel All Changes](#)

Add a Space

The renewal wizard was recently updated and now requires users to create a new space when renewing a lease.

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)

Lease Contract Spaces

No lease contract spaces found

[Add New Space](#)

- Square Feet

→ **NOTE:** If you are renewing the receivable lease(s) associated with this master lease contract, the correct square feet value is the total lease contract square feet minus the total receivable contract square feet. If you enter the total lease contract square feet, you will get a system error when you create a space for the receivable lease renewal.

- Square Feet Measurement Type (dropdown)


Edit Space Details

Space Documents Photos

Name

Required

Description

Square Feet 

Required

Square Feet Measurement Type

Required

- Primary Space Type (dropdown)
- → Refer to the [Property Class & Space Type Categories](#) job aid for additional information.
- Secondary Space Type
- Additional Space Type

Primary Space Type [?]

Required

Secondary Space Type [?]

Additional Space Type [?]

- 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.

Available Space [?]

No

→ 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.

Number of Offices (Required For Six-Year Plan) [?]

Number of Cubicles (Required For Six-Year Plan) [?]

Number of Touchdown Spaces (Required For Six-Year Plan) [?]

→ Select the information [?] icon for definitions.

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

Number of Resident Users (Required For Six-Year Plan) [?]

Number of Externally Mobile Users (Required For Six-Year Plan) [?]

Number Of Fully Remote Users (Required For Six-Year Plan) [?]


→ You will receive an error message when you click Next if the space square feet exceeds the lease contract square feet.


Errors

- The square footage of all spaces associated with a lease contract cannot exceed the lease contract square feet. The lease contract square feet is currently 19,440 and the total associated space square feet is 19,447.

3. Select SAVE CHANGES

SAVE CHANGES Cancel Changes

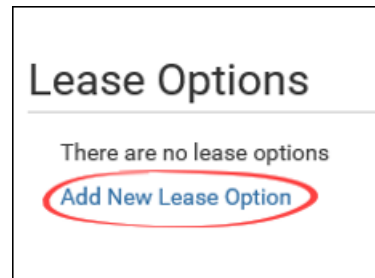
→ If you need to add a Lease Option, select 

→ If you **do not** need to add a lease option, select  three times to skip ahead to [Receivable Lease Contracts](#).



Add a Lease Option

1. Select Add New Lease Option



2. Enter agency data. Red fields are required.

- Name
 - Use the option type – option number (e.g., Cancel – 1).
- Option Number
 - Options should be numbered in the order they appear in the lease contract (1, 2, 3 etc.).
- Option Type (dropdown)
- Option Description
 - Provide a brief description of the clause in the lease.
- Option Date

Edit Lease Option Details

Lease Option Documents Photos

Name Required

Description

Option Number Required

Option Type Required

Option Description Required

Option Date Required



3. Select SAVE CHANGES



→ Once the lease option is saved, you can update the information by selecting the details icon or delete the option by selecting the trash can.

Note: Repeat this process if there is more than one lease option.

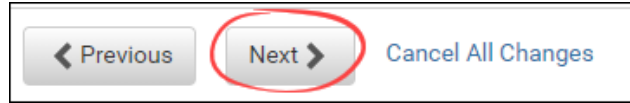
Lease Options

Lease Option Name	Lease Option Number	Details	Delete
Cancel - 1	1		

[Add New Lease Option](#)

→ Select **Next >** twice to move to Receivable Contracts.

→ If you need to enter a lease amendment, refer to the [amendments](#) job aid for details on required table updates by amendment type.



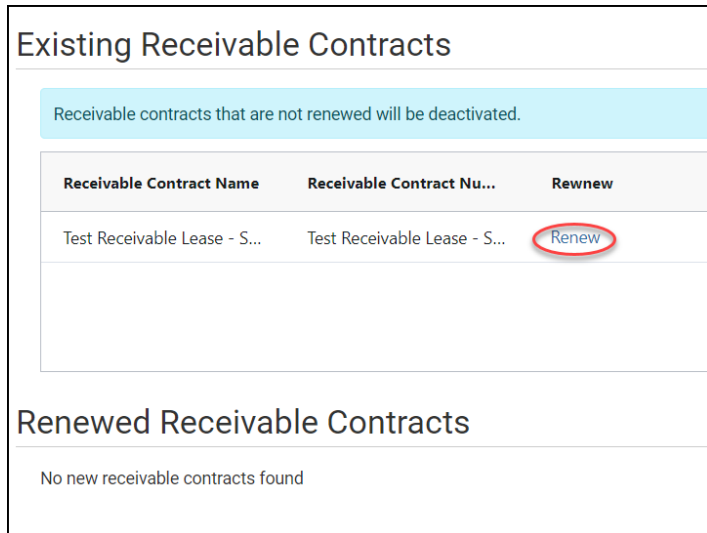
Renew Receivable Contract(s)

→ The system will display any associated receivable contracts.

→ The receivable contracts must be renewed at the same time as the master lease, otherwise they will be deactivated when you save and close the lease renewal wizard.

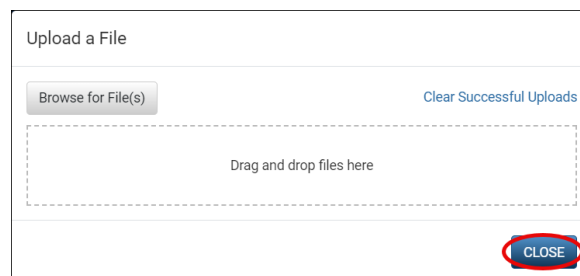
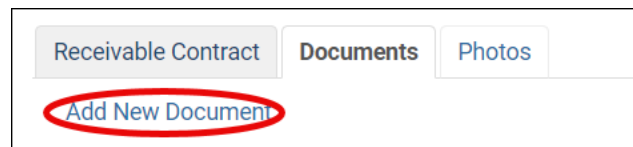
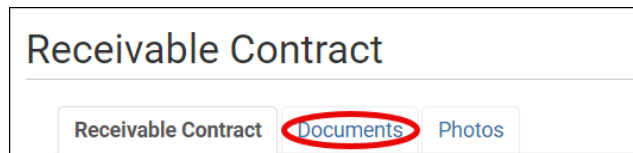
→ The system will automatically populate certain fields based on the previous lease. You can update this information if needed.

1. Select Renew



2. Upload a copy of the new contract.

- Select Documents.
- Select Add New Document.
- Browse for, or drag and drop, your file.
- Select CLOSE.



3. Enter agency data. Red fields are required.

- Name
 - Use the receivable contract number.
- Receivable Contract Number
 - Must be a unique contract number.

Name

Required

Description

Receivable Contract Number

Required

- Receivable Contract Executed Date
→ Use the date the last party signed.
- Receivable Contract Start Date
- Receivable Contract End Date
- Month-to-Month (yes/no)
→ If Yes, enter an end date one year out from the start date.
- Full Service
→ Choosing Yes will automatically populate most operating costs to lessor paid.

Receivable Contract Executed Date ?

📅

Required

Receivable Contract Start Date ?

📅

Required

Receivable Contract End Date ?

📅

Required

Month-To-Month

▼

Holdover Status

▼

Full Service

▼

→ The tenant improvement one-time cost fields only apply to office spaces that are in scope for the Six-Year Facilities Plan.
 → The tenant agency is responsible for this data and will report any applicable costs via the [Receivable Review](#) wizard after the contract has been renewed in FPMT.
 → Lessor agencies should select “No” to the following fields in order to continue with the renewal process:

- Was furniture moved to this location?
- Were staff moved to this location?
- Are there tenant improvement (TI) costs?

Was Furniture Moved To This Location?

▼

Required

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?

▼

Required

Staff Moving Cost, If Applicable

Are There Tenant Improvement (TI) Costs?

▼

Required

→ Just like with the previous tables, you will receive an error message if you try to move forward with inaccurate or incomplete data.

Errors

- The receivable lease contract start date must be prior to the receivable lease contract end date.

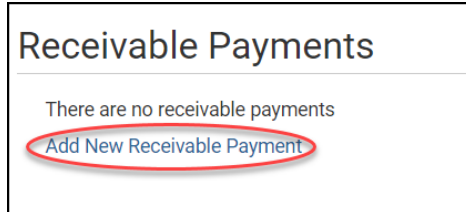
→ **Select** Next > to add a receivable payment.

← Previous
Next >
Cancel All Changes

Add a Receivable Payment

1. Select Add New Receivable Payment

→ At least one receivable payment is required. If there is no base rent, add a receivable payment for \$0.



2. Enter agency data. Red fields are required.

- Name
 - Use payment type – payment series number (e.g., Base Rent - 1).
 - Payment Series Number
 - Use sequential numbers for payment series (1, 2, 3, etc.).
 - Payment Frequency (dropdown)
-
- Payment Type (dropdown)
 - Payment Amount
 - Index Rate
 - Use the index or rate in effect at lease commencement.
 - Payment Start Date
 - Payment End Date

Edit Receivable Payment Details

Receivable Payment | Documents | Photos

Name
Required

Description

Payment Series Number
Required

Payment Frequency
Required

Payment Type
Required

Payment Amount
Required

Index Rate ?

Payment Start Date
Required

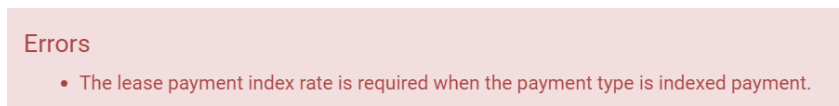
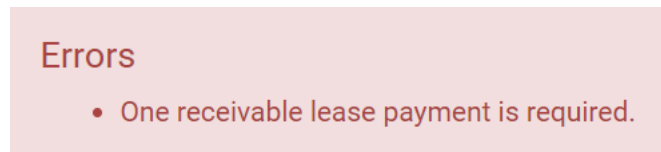
Payment End Date
Required

3. Select SAVE CHANGES





→ This table includes the following checks:

- At least one lease payment is required.
- All required fields are completed.
- The payment start and end dates must fall within the parameters of the master lease contract start and end dates.
- The Index Rate is required if the payment type is “indexed payment.”



→ Once the payment is saved, you can edit it by selecting the details icon or delete it by selecting the trash can.
→ Repeat this process if there is more than one payment series.

Receivable Payments			
Payment Name	Payment Series Number	Details	Delete
Base Rent - 1	1		


→ Once you are done adding payments, select **Next >** to add a Receivable Space.

Add a Receivable Space

The renewal wizard was recently updated and now requires users to create a new space when renewing a receivable contract.

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., DSHS – DVR Office)

Receivable Spaces

There are no spaces

[Add New Space](#)

- Square Feet
 - The sum of all receivable space square feet cannot exceed the total square feet in the receivable contract.
 - The sum of all space square feet cannot exceed the total square feet in the master lease contract.
- Square Feet Measurement Type (dropdown)


Edit Space Details

Space Documents Photos

Name

Required

Description


Square Feet 

Required


Square Feet Measurement Type


Required

- Primary Space Type (dropdown)
- → Refer to the [Property Class & Space Type Categories](#) job aid for additional information.
- Secondary Space Type
- Additional Space Type

Primary Space Type 

Required

Secondary Space Type 

Additional Space Type 

- 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.

Available Space 


No 


→ If this receivable facility is in scope for the [Six-Year Facilities Plan](#), the tenant agency must populate the following additional fields via the [Receivable Review](#) wizard after the contract has been renewed in FPMT:


- 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.


→ Select the information  icon for definitions.


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


Number of Offices (Required For Six-Year Plan) 

Number of Cubicles (Required For Six-Year Plan) 

Number of Touchdown Spaces (Required For Six-Year Plan) 

Number of Resident Users (Required For Six-Year Plan) 

Number of Externally Mobile Users (Required For Six-Year Plan) 

Number Of Fully Remote Users (Required For Six-Year Plan) 

→ Make sure the total space square feet matches the square feet in the Receivable Lease Contract table.

→ You will receive an error message when you click Next if the space square feet exceeds the receivable contract square feet.

→ Additionally, you will receive an error if the combined total of all spaces exceeds the total square feet in the master lease contract.



Errors

- The square footage of all receivable leases plus total lease contract space square footage must not exceed the lease contract square footage. The lease contract square footage is currently 28,009 and the total receivable lease square footage plus total lease contract space square footage is 28,209.
- The square footage of all spaces associated with a lease contract cannot exceed the lease contract square feet. The lease contract square feet is currently 28,009 and the total associated space square feet is 28,209.

3. Select SAVE CHANGES

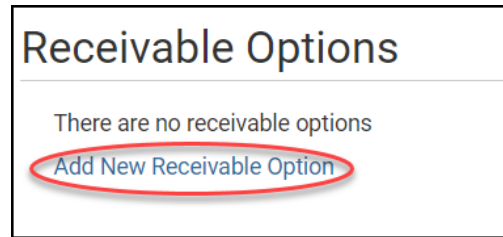
SAVE CHANGES Cancel Changes

→ Select  to add a receivable option.

 **Next**  Cancel All Changes

Add a Receivable Option

1. Select Add New Receivable Option



2. Enter agency data. Red fields are required.

- Name
 - Use the option type – option number (e.g., Cancel – 1).
- Option Number
 - Options should be numbered in the order they appear in the lease contract (1, 2, 3 etc.).
- Option Type (dropdown)
- Option Description
 - Provide a brief description of the clause in the lease.
- Option Date

Edit Receivable Option Details

Receivable Option Documents Photos

Name Required

Description

Option Number Required

Option Type Required

Option Description Required

Option Date



3. Select SAVE CHANGES



→ Once the option is saved, you can edit it by selecting the details icon or delete it by selecting the trash can.

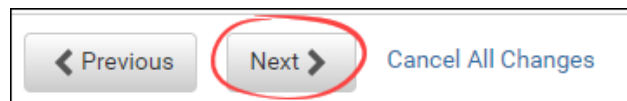
→ Repeat this process if there is more than one receivable lease option.

Receivable Options

Lease Option Name	Lease Option Number	Details	Delete
Cancel - 1	1		

→ Select [Next >](#) twice to see your renewed receivable contract.

→ If you need to enter a receivable amendment, refer to the [amendments](#) job aid for details on required table updates by amendment type.



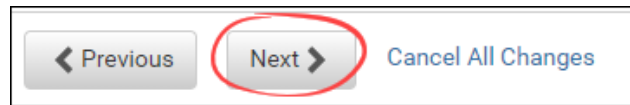
→ Once you have completed the receivable contract tables, you will see a status change in the wizard.

→ Repeat this process if you need to renew another receivable contract.

Existing Receivable Contracts		
Receivable contracts that are not renewed will be deactivated.		
Receivable Contract Name	Receivable Contract Nu...	Renew
Test Receivable Lease - S...	Test Receivable Lease - S...	Renewed

Renewed Receivable Contracts				
Renewed From	Receivable Contract Name	Receivable Contract Nu...	Details	Delete
Test Receivable Lease - S...	test	test		

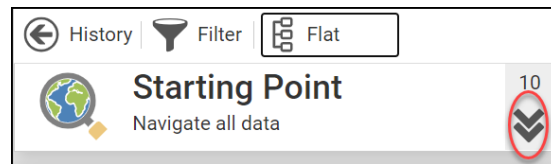
→ Select to review your data.



Data Review

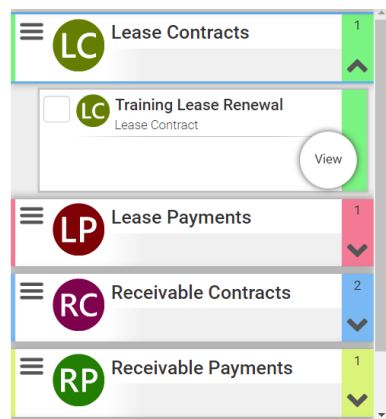
1. Select the Hierarchy button to change to the Flat view. You can now see all the tables you have added or edited as part of the renewal process.

2. Select the arrows on the Starting Point tile to expand all of the tiles below.

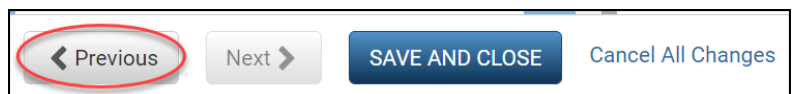


3. Select View on each tile to see the data you have entered for the renewal.

4. Review the data for your lease and receivable contract renewal.



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



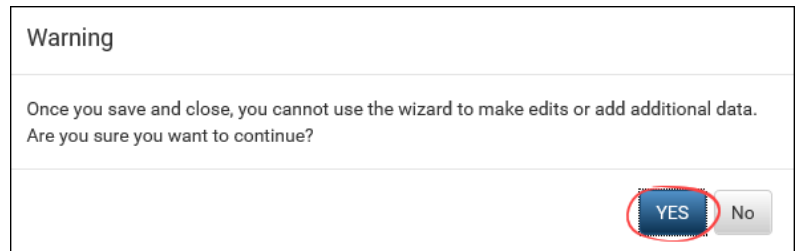
5. **Select SAVE AND CLOSE** to complete your renewal.
6. You will see a warning that lets you know you can't go back into the wizard after saving and closing. If you don't need to make any additional edits, select YES.

→When you complete the renewal, 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.

→Continue to the next step below to upload a copy of the new contracts.



Navigation buttons: < Previous, Next >, **SAVE AND CLOSE**, Cancel All Changes



Warning

Once you save and close, you cannot use the wizard to make edits or add additional data.
Are you sure you want to continue?

YES No