This job aid provides step-by-step instructions for using the Lease Review wizard to view and update existing leased facility data.

Contents

Overview 1
Start Business Process Wizard 2
Edit Lease Contracts 3
Edit Leased Facility 4
Edit Facility 5
Edit Condition Matrix 5
Edit Lease Payments 6
Edit Lease Spaces 8
Edit Lease Amendments 11
Data Review and Exit Business Process Wizard 14

Overview

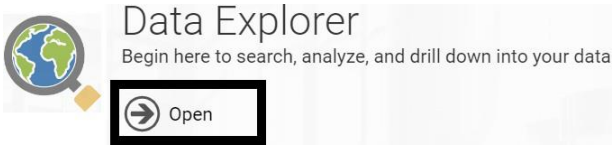
The lease review wizard allows users to view and update all tables associated with existing leased facilities. FPMT will guide you through a sequence of steps to review/edit data.

Step	Action	Additional Information
1	Start business process wizard	Use the search option to find your agency and select lease review business process wizard from the agency menu options.
2	Review/edit leased facilities	Review and edit data if needed. You will also have the opportunity to upload documents and photos to each table as you navigate through the wizard.
3	Review changes and exit business process wizard	Use the data review section to review your changes. ✓ Select save and close to exit the business process wizard. ✓ You must go through the entire wizard and select save and close in the data review section in order to save your changes to the database.

Start Business Process Wizard

The lease review wizard is available from the agency menu.

1. **Select:** Open.



2. **Select:** Search.



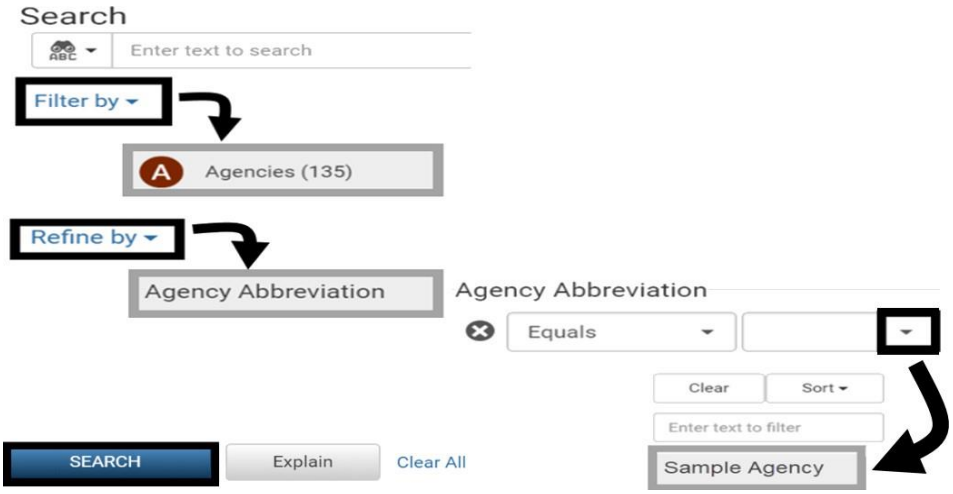
3. **Select:** Filter by.

➔ FPMT will display a list of criteria.

4. **Select:** Agencies.
5. **Select:** Refine by.
6. **Select:** Agency Abbreviation.

➔ FPMT will display additional options depending on your search criteria.

7. **Select:** Search.



8. **Select:** Menu.
9. **Select:** Lease review.



Edit Lease Contracts

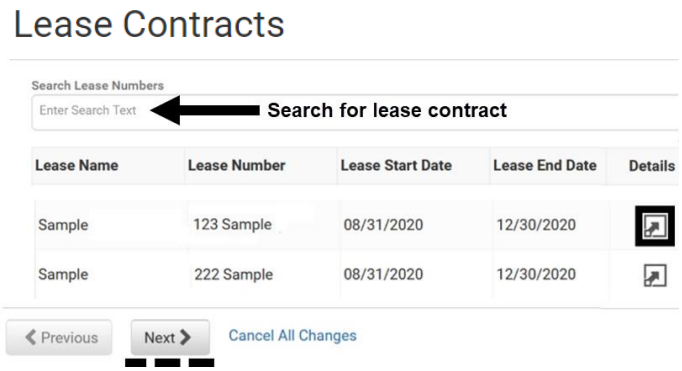
FPMT will display a list of active lease contracts for the agency.

✓ FPMT will guide you through the sequence of steps to review and edit data for lease contracts. For each lease contract, you can also edit and add payments, options, and amendments.

1. Select: Details.

➔ FPMT will display lease contract details.

➔ Use the search option to find a lease contract in the list.



2. Review/Edit: Lease contract details.

➔ Use the scroll bar to review/edit additional data.

3. To upload a copy of the lease contract:

➔Select Documents.

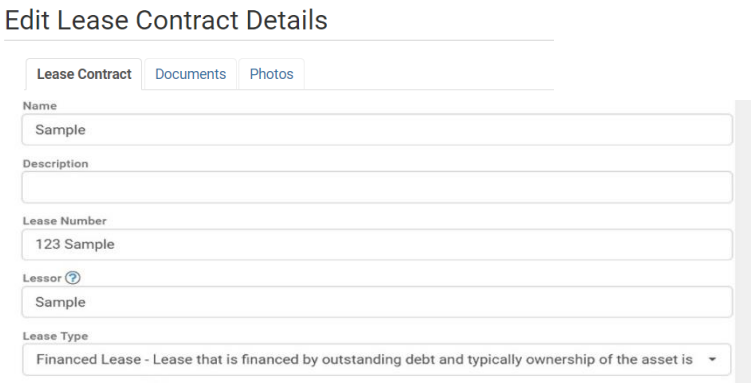
➔Select Add New Document.

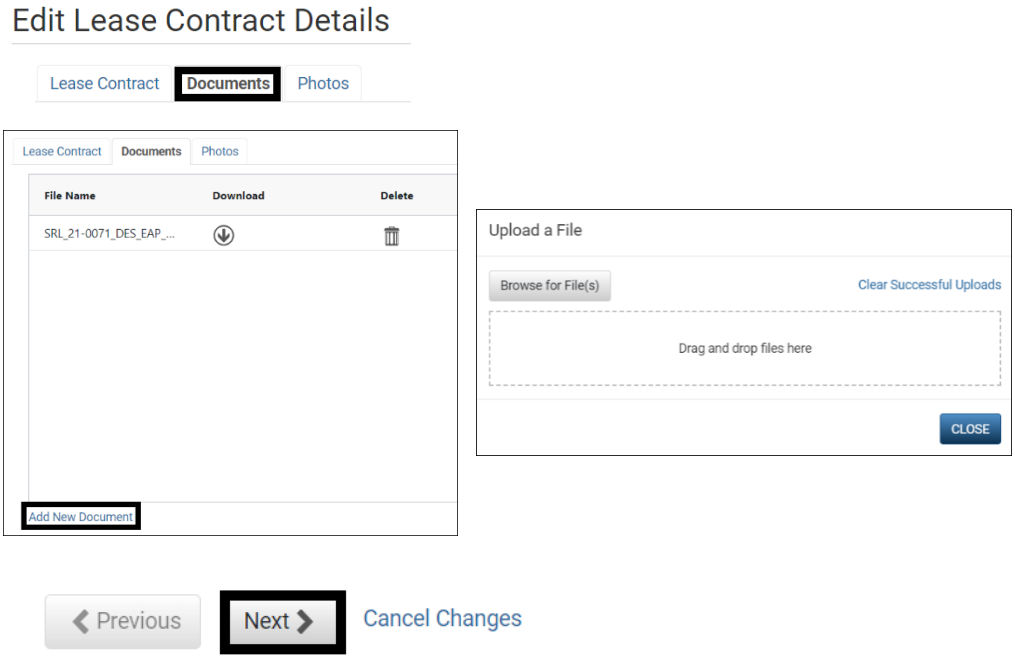
➔Browse for, or drag and drop, your file.

➔Select CLOSE.

4. Select: Next.

➔FPMT will display an error message if there are data validation issues that you need to correct.





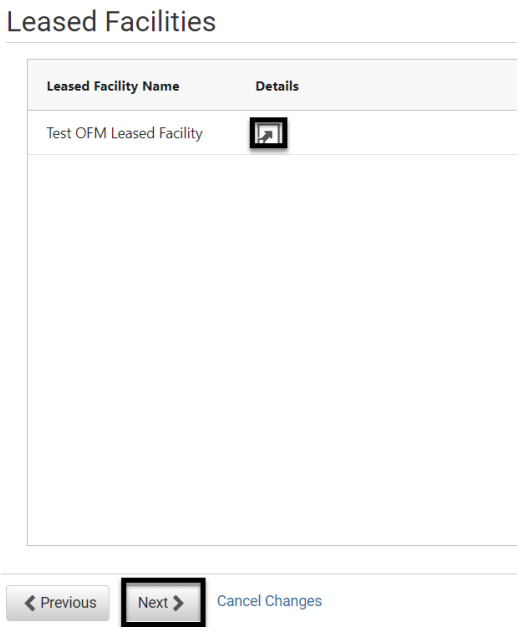
Edit Leased Facility

FPMT will display the leased facility associated with the lease contract.

1. **Select:** Details.

➔ FPMT will display leased facility details.

➔ If you do not want to review/edit your leased facility, select next to go to the next step in the business process wizard.



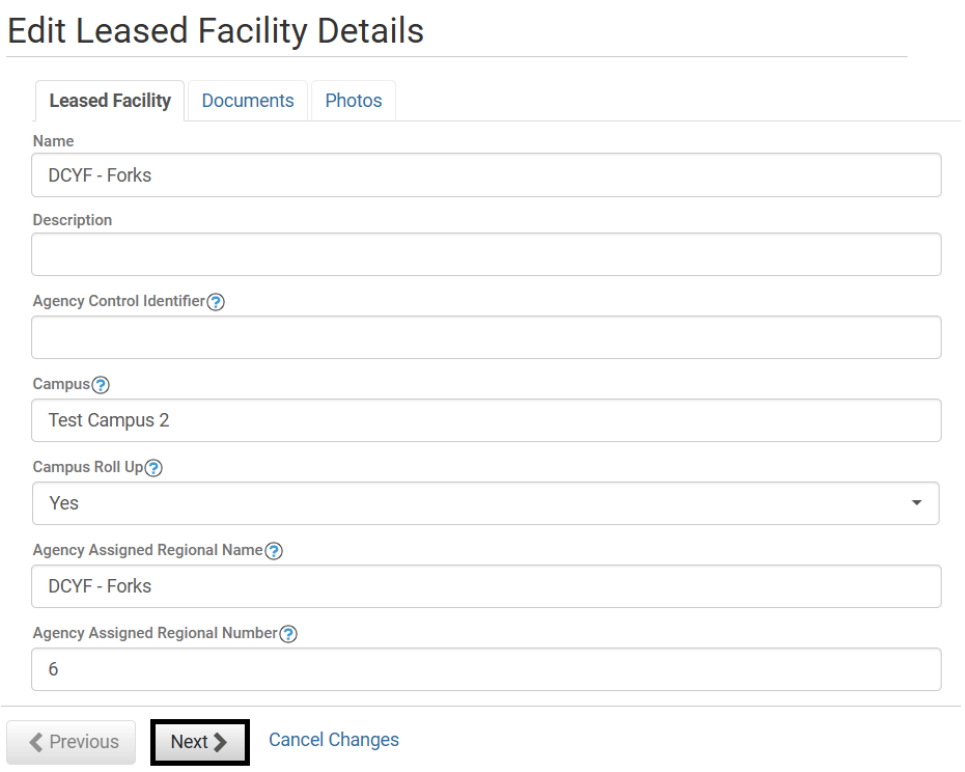
2. **Review/Edit:** Leased facility details.

➔ Use the scroll bar to review/edit additional data.

➔ Users are able to update the condition assessment score in this step.

3. **Select:** Next.

➔ FPMT will display an error message if there are data validation issues that you need to correct.



Edit Facility

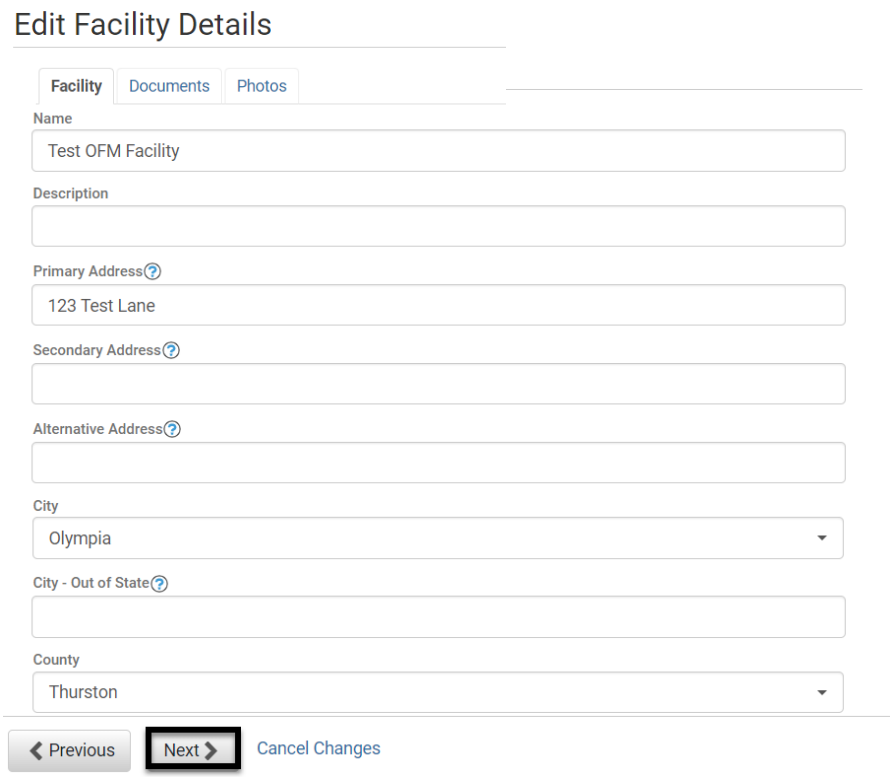
FPMT will display the facility associated with the leased facility.

1. **Review/Edit:** Facility details.

➔ Use the scroll bar to review/edit additional data.

2. **Select:** Next.

➔ FPMT will display an error message if there are data validation issues that you need to correct.



Edit Condition Matrix

FPMT will display any condition matrices associated with the leased facility.

1. **Select:** Details.

➔ FPMT will display condition matrix details.

➔ If you do not want to review/edit your condition matrix, select next to go to the next step in the business process wizard.



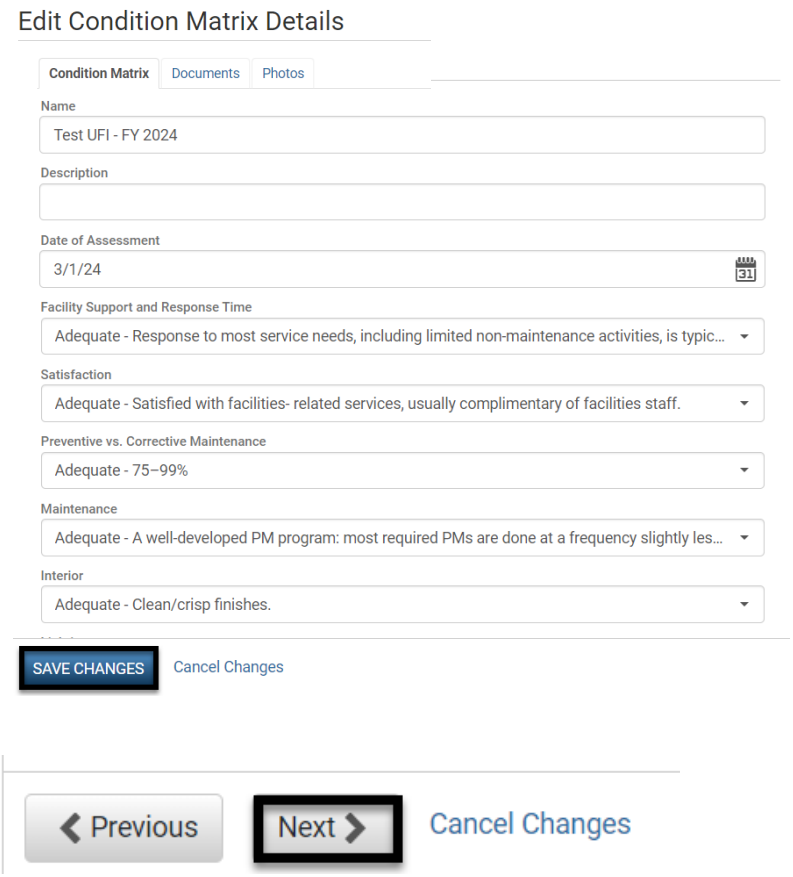
2. **Review/Edit:** Condition matrix details.

➔ Use the scroll bar to review/edit additional data.

3. **Select:** Save changes.

➔ FPMT will display an error message if there are data validation issues that you need to correct.

4. **Select:** Next



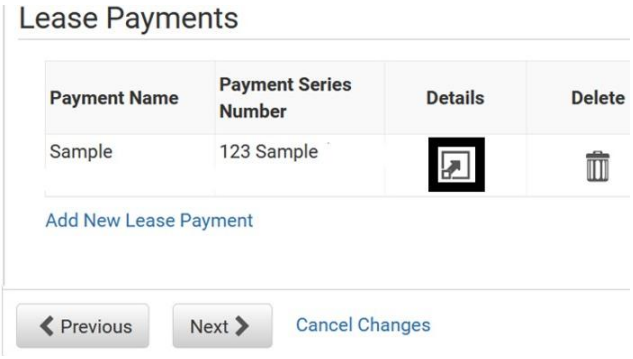
Edit Lease Payments

FPMT will display a list of active lease payments for the lease contract.

1. **Select:** Details.

➔ FPMT will display lease payment details.

➔ If you do not want to review/edit your payment(s), select next to go to the next step in the business process wizard.



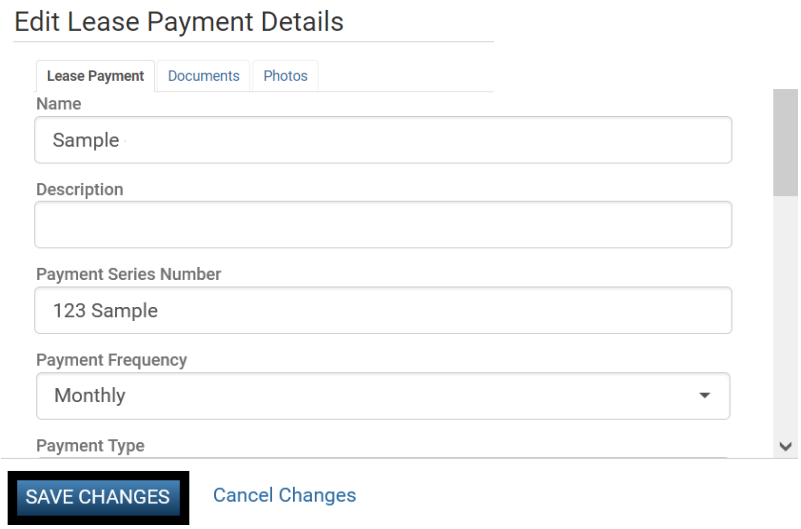
2. Review/Edit: Lease payment details.

➔ Use the scroll bar to review/edit additional data.

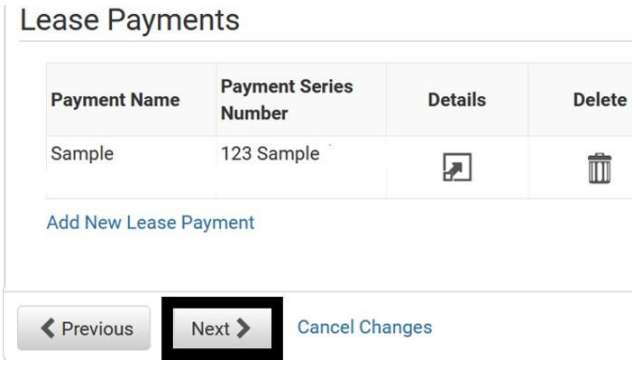
3. Select: Save changes.

➔ FPMT will display the list of lease payments so that you can select another lease payment, add a new lease payment, or go to the next step.

➔ FPMT will display an error message if there are data validation issues that you need to correct.



4. Select: Next.

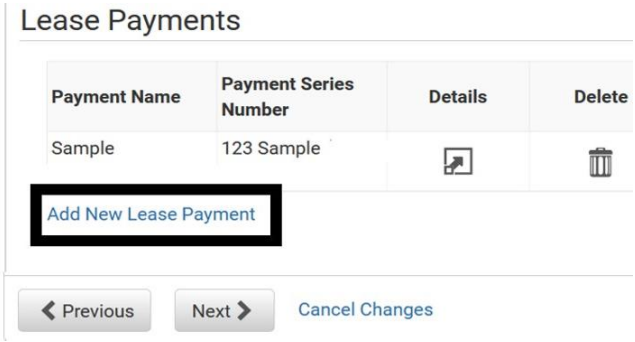


Add New Lease Payment

You can add lease payments to the lease contract.

1. Select: Add new lease payment.

➔ FPMT will display lease payment details.



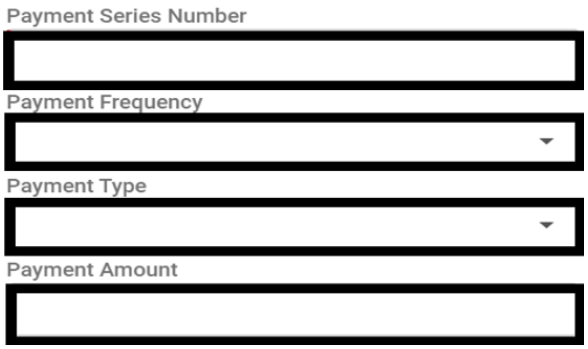
2. Input: Name.

➔ Use payment type - payment series number (payment type dash payment series number).

➔ Description is optional.



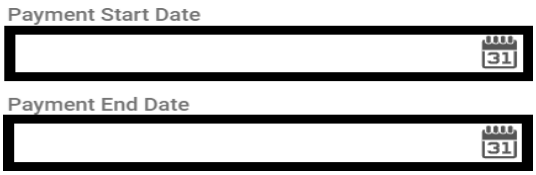
3. Input: Payment series number.
➔ Use sequential numbers for payment series (1, 2, 3, etc.).
4. Select: Payment frequency.
5. Select: Payment type.
6. Input: Payment amount.



7. Input: Index rate.
➔ Use the index or rate in effect at lease commencement.



8. Input: Payment start date.
9. Input: Payment end date.



10. Select: Save changes.
➔ FPMT will display an error message if there are data validation issues that you need to correct.

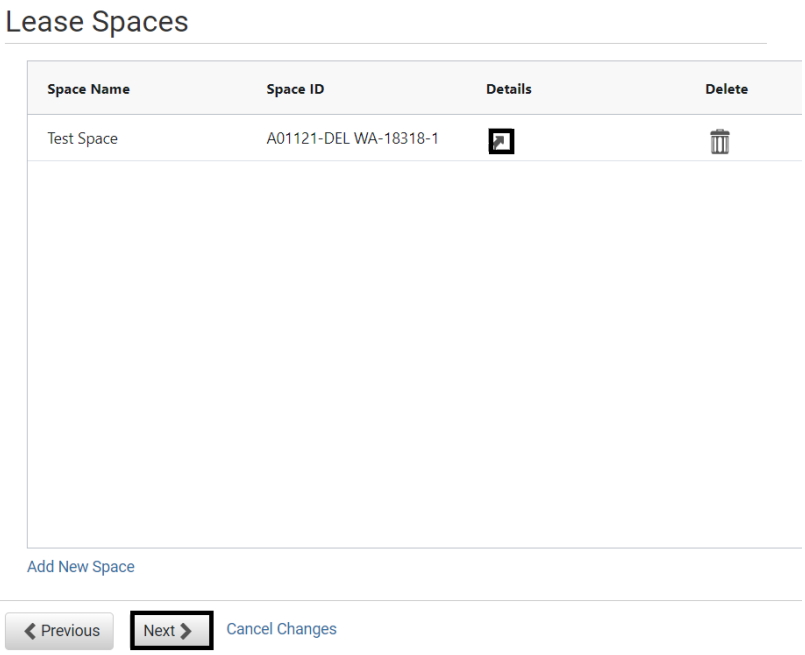


➔ FPMT will close this form so that you can review/edit additional information and proceed to the next step in the business process wizard.

Edit Lease Spaces

FPMT will display a list of active spaces for the lease contract.

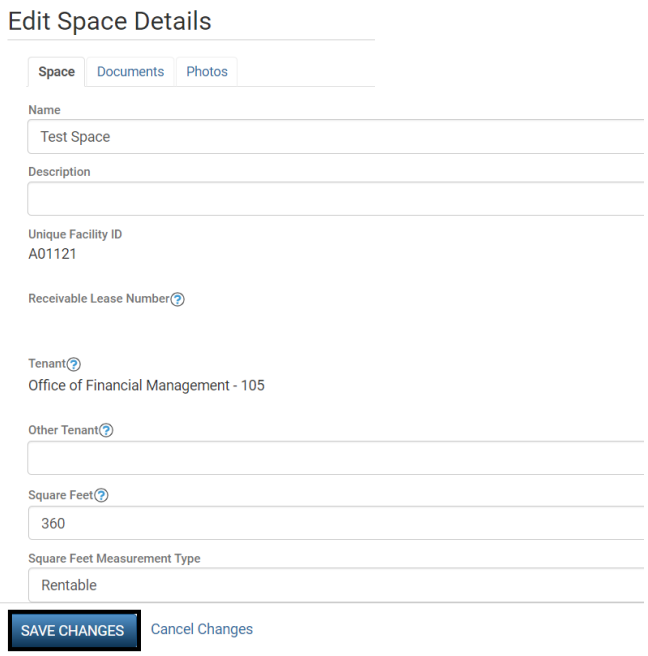
1. Select: Details.
➔ FPMT will display space details.
➔ If you do not want to review/edit your space(s), select next to go to the next step in the business process wizard.



2. Review/Edit: Space details.

➔ Use the scroll bar to review/edit additional data.

3. Select: Save changes.

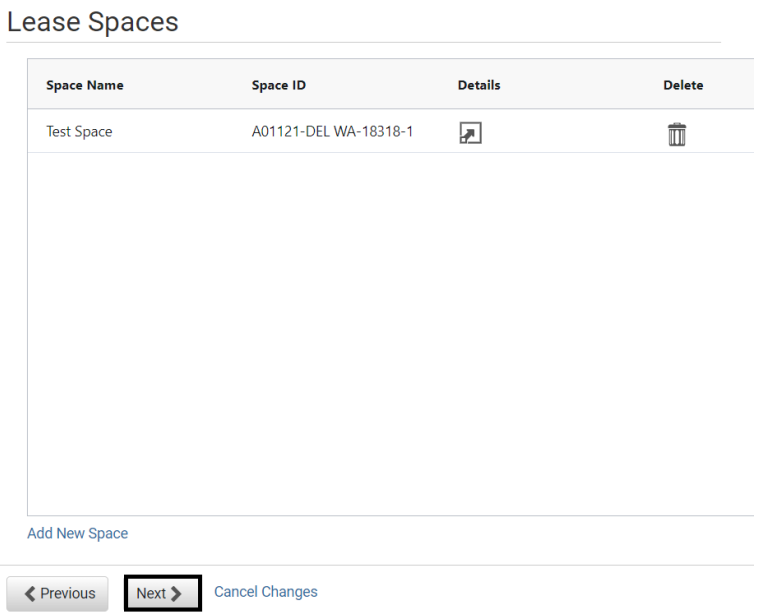


➔ FPMT will display the list of spaces so that you can select another space, add a new space, or go to the next step.

➔ The sum of all space square feet (including any receivable contract square feet) cannot exceed the lease contract square feet.

➔ FPMT will display an error message if there are data validation issues that you need to correct.

4. Select: Next



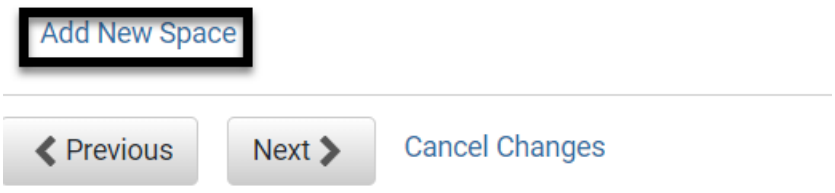
Add New Space

You can add additional spaces.

1. Select: Add new space.

➔ FPMT will display lease space details.

➔If you are reporting available space, ensure you decrease the square feet in your original space before adding a new space table.



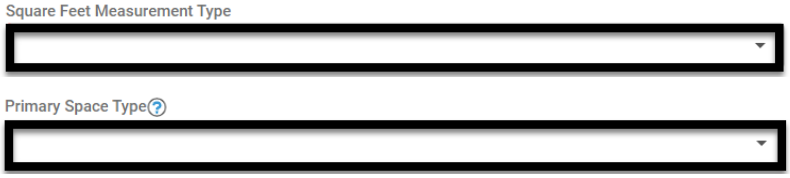
2. Input: Name.
➔ Use the tenant agency SAAM acronym – agency assigned common name (e.g., OFM – Storage Unit).
➔ Description is optional.



3. Input: Square Feet



4. Input: Square Feet Measurement type.
5. Input: Primary Space Type.



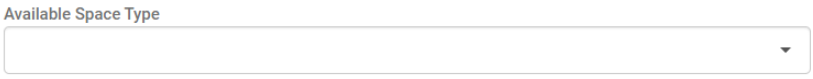
➔ Secondary Space Type is optional.
➔ Additional Space Type is optional.



6. Input: Available Space
➔ Defaulted to No.
➔ Annual Full Service Rate per Square Foot and Available Occupancy Date fields become required when Available Space is Yes.



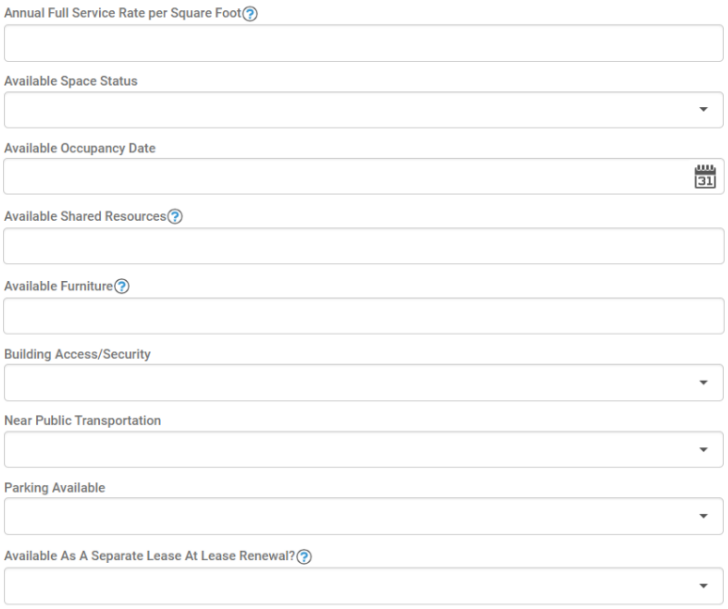
➔ Available Space Type is optional.



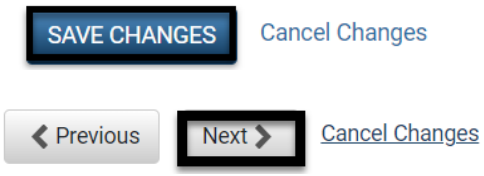
7. Input: Workstation counts.
➔ This data is required for facilities that are in scope for the Six-Year Facilities Plan.
➔ Select ? for definitions.



➔ Annual Full Service Rate per Square Foot and Available Occupancy Date are required when Available Space is Yes.
➔ Additional fields related to available space are optional.
➔ Agencies are encouraged to provide as much detail as possible about their available spaces.



8. Select: Save changes.
9. Select: Next.



Edit Lease Amendments

FPMT will display a list of active lease amendments for the lease contract.

1. Select: Details.
➔ FPMT will display lease amendment details.



2. Review/Edit: Lease amendment details.

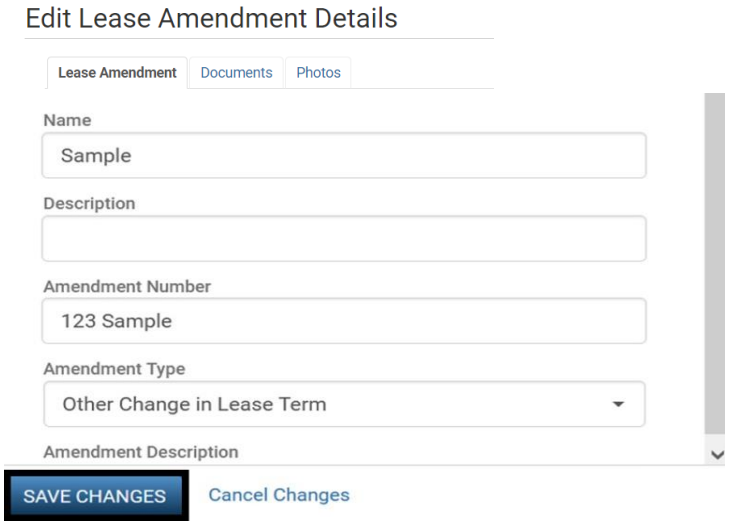
➔ Use the scroll bar to review/edit additional data.

➔ You can also upload a copy of the amendment.

3. Select: Save changes.

➔ FPMT will display the list of lease amendments so that you can select another lease amendment, add a new lease amendment, or go to the next step.

➔ FPMT will display an error message if there are data validation issues that you need to correct.



4. Select: Save changes.

➔ FPMT will display a list of active lease contracts so that you can select another lease for review or select next to go to the next step.

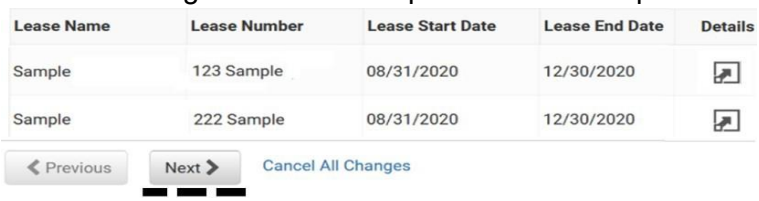
➔ FPMT will display an error message if there are data validation issues that you need to correct.

5. Select: Next.

➔ FPMT will display the next step to review/edit lease contracts.



➔ In this example, we can select another lease contract to review or select next to go to the next step in the business process wizard.



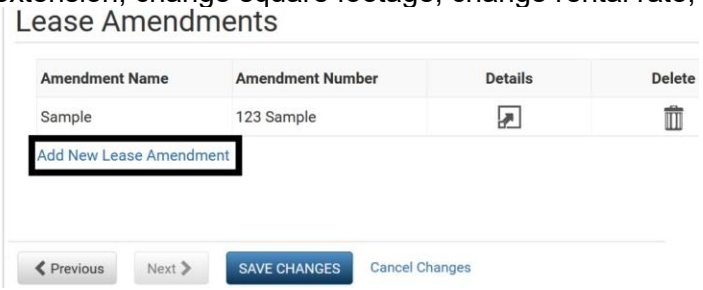
Add New Lease Amendment

You can add lease amendments to the lease contract.

✓ Amendments provide a way to document specific changes for an existing contract. For example, common amendment types include lease extension, change square footage, change rental rate, etc.

1. Select: Add new lease amendment.

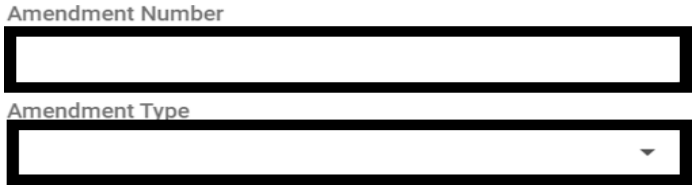
➔ FPMT will display lease amendment details.



2. Input: Name.
➔ Use the amendment type and amendment number for the name.
➔ Description is optional.



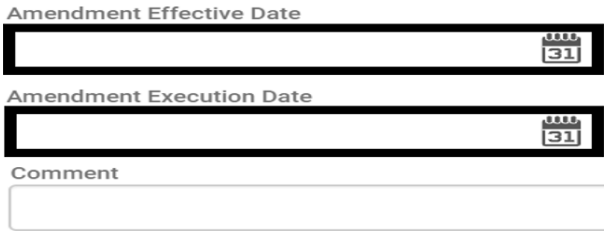
3. Input: Amendment number.
➔ Use sequential numbers for amendments in the order they were executed (1, 2, 3, etc.).
4. Select: Amendment type.



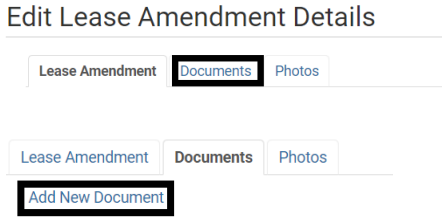
5. Input: Amendment description.
➔ Provide brief description of what has changed in the lease.



6. Input: Amendment effective date.
7. Input: Amendment execution date.
➔ Comments are optional.



➔ Upload a copy of the amendment before saving your changes.
8. Select: Documents.
9. Select: Add New Document.
10. Browse for, or drag and drop, your file.
11. Select CLOSE.



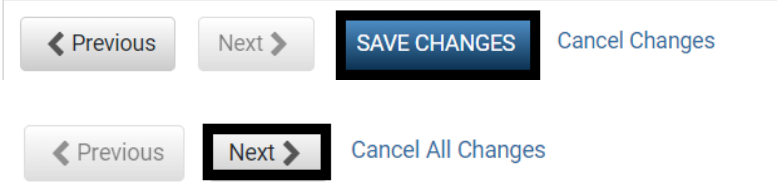


12. Select: Save changes.
➔ FPMT will display an error message if there are data validation issues that you need to correct.



➔ FPMT will close this form so that you can review/edit additional information and proceed to the next step in the business process wizard.

13. Select: Save changes.
14. Select: Next.



Data Review and Exit Business Process Wizard

You can expand each area to display specific lease contracts. This provides a quick way to review the information before you save your changes and exit the business process wizard.

1. **Select:** Open.
2. **Review** your data.
3. **Select:** Save and Close.

➔ Select Previous to return to an earlier screen for edits.

➔ FPMT will display an error message if there are data validation issues that you need to correct.

➔ FPMT will close the wizard when you save your data.

