Applies to: All Washington University School of Medicine Business Units

GUIDELINES:
Issued: July 15, 2015
Author: FMD Physical Planning for Administrative Finance

PURPOSE:
To establish guidelines that ensure all Washington University School of Medicine Business Units understand the process to maintain accurate Facilities information as changes are made to all space (laboratory, office, patient care, etc).

PROCESS:
In an effort to maintain accurate Facilities information, it is required that Business Units complete this form as changes are made to space, including the assignee, occupant, room type, recharge rooms, space loans, or renovations under $15,000. You may also attach any supplemental documents to this form. Changes that are not reported may not be reflected properly in rent models and reporting is the responsibility of the Business Unit Manager.

Date: Enter current date; this field is auto-filled.
First Name: Enter your first name; this field is auto-filled.
Last Name: Enter your last name; this field is auto-filled.
Department: Enter you department name; this field is auto-filled.
Phone #: Enter your phone number; this field is auto-filled.
Building/Floor: Enter the building name where you sit; this field is auto-filled.
Manager: Enter you manager; this field is auto-filled.

REQUIRED INFORMATION - CHECK ALL THAT APPLY
This information will be updated and captured in Online Spatial Information System (OSIS) by FMD Physical Planning to ensure accurate data management and utilization reporting once reported by the Department Unit.

☐ Change Department (Assignee or Occupant) Check if the Assignee or Occupant of a room has changed.

Room Split # (i.e. 101^01): Enter the room split number that the assignee or occupant has changed.
(Optional) Room Split %: Enter the room split % of the room that the assignee or occupant has changed.
Existing Assignee Dept #: Enter the existing Assignee Dept # if this has changed.
New Assignee Dept #: Enter the new Assignee Dept # if this has changed.
Existing Occupant Dept #: Enter the existing Occupant Dept # if this has changed.
New Occupant Dept #: Enter the new Occupant Dept # if this has changed.
☐ Is this an interdepartmental exchange? Check is this is an exchange of space between departments.
☐ If yes, does a written agreement exist? Check if there is a written agreement was created.
   If yes, please attach written agreement with the secondary Department’s approval.
   If no, Department must get a written agreement with the secondary Department’s approval before moving forward. Attach written agreement.

☐ Room has been renovated and the room type has changed. If room type involves lab/lab support, must receive prior approval from EF Space Committee before a change is made. Check if a room has been renovated and there is a change in room type.

Room #: Enter the room number of the space that has a change in type.
(Optional) Room Split %: Enter the room split % of the room that has a change in type.
Existing Room Type: Enter the existing room type of the space that has a change in type.
New Room Type: Enter the new room type of the space that has a change in type.

*For requests involving room type change, please attach documentation of rationale and need. Attach written agreement.

☐ Change in Recharge Room(s) Check if there has been a change in a Recharge Center.
Room #: Enter the room number of the space that involves a Recharge Center.
Recharge Center Name: Enter the name of the Recharge Center.
☐ Removed Check if the room no longer operates as a Recharge Center.
   OR
☐ Added Check if the room is now operating as a Recharge Center.
   Account #: Enter the account number for the Recharge Center.
   Number of other departments supported by this recharge center: Enter the number of other departments that are served by this recharge center.
   Previous year’s revenue coming from other departments: Enter the revenue from other departments for the previous year.

☐ Space Loan Documentation Check if there is space loaned from one department to another.

This reflects the arrangement between the parties pertaining to Occupant’s use of Assignee’s room(s) as further described below.

Assignee Dept: Enter the Assignee Department for the space that is being loaned.
Occupant Dept: Enter the Occupant Department for the space being loaned.
Assignee Contact
Name: Enter name of the Assignee Contact.
E-mail: Enter e-mail of the Assignee Contact.
Phone: Enter phone # of the Assignee Contact.

Occupant Contact
Name: Enter name of the Occupant Contact.
E-mail: Enter name of the Occupant Contact.
Phone: Enter name of the Occupant Contact.

Building/Floor: Enter the Building and Floor of the space that is being loaned.
Room(s) #: Enter the room numbers of the spaces that are being loaned.

Start Date: Enter the date when the space will start being on loan.
End Date: Enter the date when the space will stop being on loan.

Does a written agreement exist: Enter yes or no.
If yes, please attach agreement with the secondary Department’s approval.
If no, Department must get a written agreement with the secondary Department’s approval before moving forward. Attach written agreement.

OPTIONAL INFORMATION - CHECK ALL THAT APPLY

☐ Change in PI  Check if the PI of a room has changed.

Room Split # (i.e. 101^01): Enter the room split number that the PI has changed.
(Optional) Room Split %: Enter the room split % of the room that the PI has changed.
Existing PI: Enter the name of the existing PI.
New PI: Enter the name of the new PI.

☐ Change in IDC Code  Check if the IDC Code of a room has changed.

Room Split # (i.e. 101^01): Enter the room split number that the IDC Code has changed.
(Optional) Room Split %: Enter the room split % of the room that the IDC Code has changed.
Existing IDC Code: Enter the existing IDC Code.
New IDC Code: Enter the new IDC Code.

For any agreements between departments, a written Letter of Agreement is required.

For renovations under $15,000 that were self-managed by the Department

Prior to renovating, please see the Procedure for Department Managed Repair and Renewal Projects Under $15,000.

☐ Space is undergoing, scheduled for or has had renovations completed that were self-managed by the Department. Attach permit drawing or applicable floor plan with room detail noted.
Check if renovations have changed the floor plan; if yes, attach permit drawings or a floor plan showing what has changed.

☐ Space needs new room numbers assigned. Check if there is space that does not have a room number but needs one assigned.

☐ You see a discrepancy in one of the floor plans. Attach a copy of the floor plan with areas noted. Check if there is a floor plan that is not consistent with how the space is built.

We thank you for taking the time to complete this form in order to keep our records current.

IF YOU NEED ANY ASSISTANCE, PLEASE CONTACT OUR OFFICE.
Space information or general questions: Keith Van Booven 362-8146