

## OAA Standard Contract Suite 2021 - How to Use the Template Files and Customize

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### Compatibility PC/MAC & Software:

The PDF fillable forms were created with Adobe Acrobat Pro. Different software packages for reading and writing PDFs will vary in their compatibility with various aspects of the PDF standard. Some packages may provide all the functionality required, while others may be lacking. The OAA recommends testing compatibility before facing a deadline.

### About the PDF Template Files (OAA 2021 Contracts and Attachments)

The templates which comprise the OAA Contracts and customizable Attachments (Schedules and Appendices) are meant to work together. Select the Schedules and Appendices needed for the project by marking the checkboxes on Table of Contents page in contract file.

Determine if the client or consultant prefers signing the documents digitally or working with a paper copy. The documents may be completed electronically, or be printed and completed by hand.

The base contract is a secure PDF file with fillable fields. Note, some of the fields are pre-populated with suggested content, and can be edited to be project specific.

The fillable PDF contract Attachments file includes multiple Schedules and Appendices. These are provided unsecured, and can be edited in part or replaced in their entirety as required. Additional files/pages may be added as needed to support specific project requirements. A Word version of the contract Attachments is also available as an alternate.

### Step 1: Download the Latest Template Files

Always make sure to download and use the latest files available. This includes the secure OAA Contract file, the contract Attachments, and the corresponding Guide.

If unsure, refer to the [Index to OAA Contracts and Guides](#) located in [Documents & Publications section](#) of the OAA Website to confirm which are the latest versions and which older versions may still be available for use.

### Step 2: Save the Downloaded Files

Once downloaded, save a copy of the files to your computer.

Rename the contract and attachment files appropriately (e.g. "OAA\_600-2021\_Contract\_Master" & "OAA\_600-2021\_Contract\_Attachments\_Master").

### Step 3: Review the Guide and Sample Contract

The Guide will be updated from time to time. Refer to the latest version available on the OAA website.

The Guide includes a Sample OAA Contract with Attachments (schedules and appendices) filled out for reference. To access the Sample Contract, it may be necessary to open an "Attachment" pane (Click the

paperclip symbol if you are using Adobe or Microsoft Edge, for example). Other software may vary in how they display attachments to PDFs.

While reviewing the documents, anticipate points to discuss or clarify with the client or subconsultant. This can be an important part of managing the other party's expectations. Time spent at this stage may prevent disagreements later.

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#### **Step 4: Start Filling in the OAA Contract and Attachments (Schedules and Appendices) Templates**

Start filling in the blanks in the contract, referring to the Guide or Sample Contract as needed.

Assess which Schedules and Appendices are needed for the project. Confirm your assessment with the client or the subconsultant, if required.

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#### **Step 5: Save Drafts of the OAA Contract and Attachments (Schedules & Appendices) Files**

Save drafts of the OAA Contract file (secure) copy. This should still be an "un-locked" copy in case later changes are to be made.

Save drafts of the Attachments template which includes the Schedules and Appendices.

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#### **Step 6: Add Other Attachments as Required to the Schedules and Appendices**

The Attachments file is unsecured so that it can be customized, if needed.

To add your own content, convert any pages or documents to be included as part of the contract to a PDF.

Attach additional or alternate appendices, schedules or other documents, by opening the "page thumbnails" sidebar and inserting pages or using suitable software.

There is a single lock button to lock the contents of the file. Save the completed file before locking. Lock the schedules and appendices only when changes are finalized. Refer to Step 7 for additional information.

The Attachments file is also available in Word format.

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#### **Step 7 A: Final Review and Locking the OAA Contract Content Prior to Signing by both Parties**

Once the contract is complete, use the button located on the signature page. This will create a "locked" copy of the secure file with all of the fillable fields locked, except for the signature spaces (i.e. the file cannot be edited further, only signed).

Save the locked file with a unique name to identify it for the project, and to preserve the unlocked version in case the client requires a change, or there is a typographical error.

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#### **Step 7 B: Final Review and Locking the OAA Attachment Content**

Once the attachment file is complete, use the button located on top of Schedule 1. This will create a "locked" copy of the secure file with all of the fillable fields locked.

If you have included Appendix B, it will be locked except for the signature spaces (i.e. the file cannot be edited further, only signed).

Save the locked file with a unique name to identify it for the project, and to preserve the unlocked version in case the client requires a change, or there is a typographical error.

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#### **Step 8: Digitally Sign the OAA Contract, Schedules and Appendices**

Print your name/title then sign the contract and attachments as appropriate, following the instructions for the software of your choice.

Note that some software may require the file(s) to be in PDF/A format or may convert the files to that format as a security measure.

Once your signed version is created, use the “Architect – Lock” or “Lic. Tech. – Lock” button and save the contract file for client’s signature.

Send these OAA Contract and Attachments files to the client or subconsultant for review, acceptance, signature, and return.

Provision is made for Clients to add a corporate seal in the designated area on the signature page of the contract.

Sign digitally if sending by email or print a hard copy to sign by hand before sending to the client. This will avoid having to check for inadvertent changes before signing.

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### **Additional Resources/Links**

For additional information on how to fill out the contract or the attachments, refer to latest version of the corresponding Guide.

For information about electronic signatures, refer to your preferred digital signature provider.