

OAA 600-2021 Contract - 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 (OAA 600-2021 Contract and Attachments)

The templates which comprise the OAA Contract and customizable Attachments (Schedules and Appendices) are meant to work together.

Determine if the client prefers signing the documents digitally or working with a paper copy.

The templates 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.

Step 1: Download the Latest Template Files

Always make sure to download and use the latest templates 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.

Step 2: Save the Downloaded Files

Once downloaded, save a copy of the templates 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 latest version.

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 how they display attachments to PDFs.

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

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, if required.

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

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

Resave the Attachments template which includes the Schedules and Appendices.

Step 6: Add Other Attachments as Required

The Attachments file is customizable as it is unsecured. There are lock buttons for each included document.

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 electronically, using suitable PDF software.

Lock the schedules and appendices only when changes are finalized. Refer to Step 7 for additional information.

Step 7: Lock and Save the OAA Contract

Use the button at the bottom of the signature page to create a "locked" copy of the secure file with all the fill-ins locked except 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.

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

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.

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

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.

Additional Resources/Links

For additional information on how to use the contract, refer to latest version of the corresponding Guide.

For information about electronic signatures, refer to the latest version of the Guide or your preferred digital signature provider.