The sample documents available on the Management of the Practice (MoPrac) portion of the OAA Website are not official OAA documents, rather they are representative of documents used by members of the OAA in their practices. To the best of our knowledge, the contents/wording incorporate the recommendations found in the RAIC Canadian Handbook of Practice, the OAA Practice Bulletins, and OAA Regulatory Notices.

There is nothing magical about the style, fonts, format or layout of the sample documents. They are intended to be accessible documents. You are encouraged to rework the samples to suit your own preferences or branding.

Where several versions of a document are available, it is because the variations were developed in response to different client requirements, different forms of contract, the needs of sole practitioners vs. multi-person firms, regional differences in standard practice, or individual experience. Where appropriate, these factors are explained in the commentaries on the web site.

As the text documents are updated, they are being converted to the 2013 Microsoft Word file format for greatest compatibility. Many of the documents contain form fields and are therefore protected against accidental deletion. There is no password, so to unprotect a document for editing in Word 2007 and later: Select the “Review” tab on the ribbon, click on “Restrict Editing”, click on “Stop Protection” at the bottom of the page, edit as needed then click on “Yes, Start Enforcing Protection”, and “OK”. If you still use an earlier version of Word: select “Tools” “Unprotect”, edit as needed then select “Tools”, “Protect Document”, “OK”. Save the file.

The use of form fields in the documents is not sophisticated. It was done to show some of the functionality available that some users may not be aware of, and to reduce repetitive input. For the form fields to work as intended, some users may need to adjust their security settings under “File, Options, Trust Center, Trust Center Settings”

Some of the documents use “ASK” fields. When a document is opened, small dialog boxes will appear requesting information. By inputting the information in the dialog box, it will automatically be displayed in several locations in the document. This is done so the information only has to be entered once. To see how this is done, unprotect the document, press “Ctrl + A” to select all the text, then press “Alt + F9” to display the fields. If you do not like the way the “ASK” fields work, you can simply delete them, the associated “REF” fields in the document, and then enter the required information manually.

A number of the documents are templates (.dot or .dotm). This was done so the “ASK” fields are triggered only when a new document is created from the template rather than every time the document is opened. If you need to enter additional information after an “ASK” field has been dismissed, follow the procedure above, right click the appropriate field, select update from the pop-up menu, and fill in the desired information. Press “Ctrl + A” to select all the text, then press “Alt + F9” to hide the fields, and “F9” to update all the fields.

The “Sample” watermark can be removed by unprotecting the document, opening the header for editing and then double clicking on the watermark to edit it. Either delete it completely or erase the text.

As the workbooks are updated, they are being converted to the 2013 Microsoft Excel file format for greatest compatibility.

Some of the documents contain VBA macros. In order to access the functionality, you may have to set the options of Word or Excel to permit the macros to run. You will also have to enable macros each time the file is opened or set the file to be a trusted document. Macros are used where the desired functionality cannot be obtained from the functionality available in the standard user interface. Documents with VBA macros may not function in some of the available Microsoft compatible office suites.

The sample documents were developed by architects for use within their own practices and are made freely available for your use. They come with no guarantee or warrantee, express or implied. Use them at your own risk. There is not a team of programmers supporting these documents, so don’t expect frequent updates. If you find them useful, let Practice Advisory Services (PAS) know. If you think a revision would make any document more useful to all users, suggest it to PAS. If you find an error, tell PAS about it so it can be fixed.

If you have a useful form that is not available here, you may submit it for consideration by emailing it to PracticeAdvisor@oaa.on.ca along with a description of how and when to use it. It will then be forwarded to the appropriate committee for review.