

APRIL 2025

AIA CATINA CONTRACT FINALIZATION PROCESS



SKYLINE
Construction

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OVERVIEW

About AIA Catina:

AIA Catina is Skyline's designated platform for finalizing Owner Contracts and AIA Change Orders digitally, using standardized Skyline templates and contract exhibits. Whenever possible, Skyline uses our version of AIA Contract templates, which have been edited to meet Skyline's contract needs.

The AIA templates used most often are:

- **AIA A104-2017** – Standard Abbreviated Form of Agreement Between Owner and Contractor
- **AIA A104-2017 Exhibit A** – Determination of the Cost of the Work

ROLES AND RESPONSIBILITIES / PREREQUISITES

Operations and Legal are responsible for facilitating the Owner Contract Review Process ahead of the AIA Catina finalization process.

Reminder: All contract review and execution steps must be completed prior to uploading or finalizing contracts in Catina.

Operations (APM+):

- Initiate the Skyline Owner Contract Request process by requesting the latest draft Skyline AIA Contract template from Legal, including submission of a completed Background Information Items: Contract Request Template.
- Update all project-specific information in the draft contract.
- Confirm with the project Owner that they agree with the contract terms and conditions.
- Pull all required Contract Exhibits into the Project Contract Folder in .pdf format, including the applicable Contractor's Labor Rates Exhibit for your region.
- Approve the final "Redline Draft" contract prior to submission for Legal review.

Legal:

- Provide the requested Skyline AIA contract template documents in both 'Red Line' and 'Clean' formats.
- Collaborate with Operations to address any Owner concerns or edits to Skyline's standard template.
- Finalize all approved edits in the draft and provide the finalized "Clean" draft for uploading into Catina.

AIA Catina Point of Contact (POC):

- Set up the project in the Catina platform and add project contacts to the Catina project.
- Finalize all Skyline AIA contract templates within Catina.
- Import all contract exhibits into the Catina project.
- Create the final Project Manual and save it to the Skyline project Contract Folder.
- Confirm with the Project Manager that the contract package is ready for execution.
- If applicable, send the finalized contract through DocuSign for signature.
- Process AIA Change Orders in Catina as required.

FINALIZE DRAFT CONTRACT TEMPLATE FOR UPLOAD

Once all stakeholders have reviewed and approved the redlined draft of the AIA Contract template, and the Project Manager (PM) has confirmed that all necessary project-specific information has been updated, the following steps must be completed:

- 1. Submit to Legal:**
The Project Manager (PM) sends the approved 'Redline' draft to the Legal team for final review.
- 2. Creation of the 'Clean' Draft:**
Legal reviews the submitted Redline and prepares the finalized 'Clean' draft version of the AIA Contract template.
- 3. Upload to AIA Catina System:**
Once the 'Clean' draft is complete, the AIA Point of Contact (POC) uploads the document into the AIA Catina system. The POC finalizes the document and creates the Project Manual, preparing it for contract execution.

Reminder: Ensure all contract exhibits are pulled into the Project Contract Folder before uploading INCLUDING the **Skyline Contractor Labor Rates exhibit**. This exhibit is MANDATORY. It creates a specific hourly rate that can be altered / adjusted per title / labor classification as needed per project / region / market sector. It is Important for all owner contract types. These rates will be used when labor is charged in Owner Change Orders, Allowance and Contingency usage as well as T&M work. Combined with language in the Audit provision (GMP / CM Agreement only), the rate itself is not auditable. Remember: Base Rate (Salary) + Burden + Rate Profit = Labor Rate.

CATINA PROJECT SET UP

Once you have received the finalized 'Clean' contract template from Legal, you will process it through the AIA Catina software to generate the final contract and package it together with all applicable contract exhibits.

1. Open the AIA Catina Software at <https://catina.aiacontracts.com/app/project/list>. You may be asked for your two-party authenticator code which will be sent via text to the phone associated with your license.
2. Once logged in, select “+ New Project.” A new screen will pop up. This is where you will enter the project specifics including project location and contract amount. It is required that you complete the full project set up.



3. Using the Skyline AIA ‘Clean’ draft contract template received from Legal, you will complete the following information to set the project up in AIA Catina:

Sections to Complete:

1. **Project Name**
2. **Project Type** – this is a drop down. Standard will be Either ‘Corporate Offices,’ ‘Healthcare,’ or ‘Commercial Retail.’
3. **Contract Cost Structure** – this is a drop down. You Will determine this from the AIA Template ~ Article 3 Contract Sum.
4. **Development Type** – this is a drop down. You will always select “Renovation” unless otherwise directed by the PM
5. **Project Description** – will always be “Tenant Improvement” unless directed otherwise
6. Project Address
7. **Project Value** – You will pull this information from Article 3 Contract Sum of the AIA Template
8. **Select Your Role** – You will always select “Contractor” unless directed otherwise
9. **Project Numbers** – If we have assigned a Job # this can be completed. If a Job # has not been assigned Can be updated later.

Create New Project Discard Create

Project Name *

Project Type *

Contract Cost Structure * Development Type *

Project Description

Project Address

Address

City State Zip Code

County United States

Project Value

Select Your Role

Project Numbers

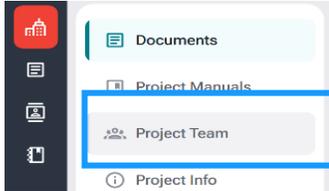
Architect Number Contractor Number Owner Number

Your project is now set up and ready for the Project Team to be added, contract documents to be uploaded, and where applicable, finalized, and the Project Manual to be created.

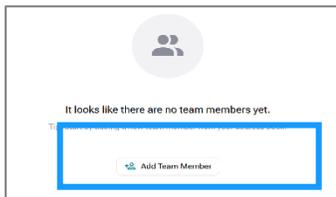
SET UP THE PROJECT TEAM

Once your project is set up, you will set up your “**Project Team**”

1. Select “**Project Team**” from the side panel:



2. Select “**Add Team Member**”:



You will use the following fields to build out each Team Member’s profile:

- Role
- Organization
- Representative Contact

Add Team Member Discard Create

Role *
 Select an option

Organization *
 Select an option

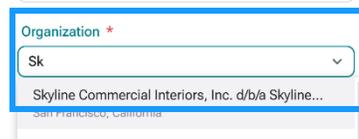
Representative Contact
 Select an option

- a. **Role:** Select the appropriate **Role** for each Team Member:
 - **Owner** (the client we are contracting with)
 - **Architect**
 - **Contractor** (Skyline)
- b. **Organization:** Type in the legal company entity associated with the selected Role.

Note:

Be sure to select the correct Skyline entity for **Contractor**.

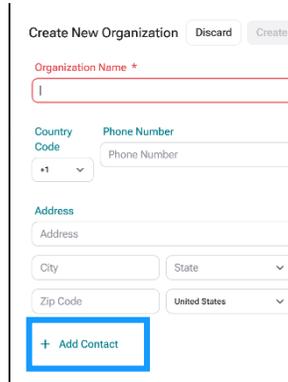
- Skyline Commercial Interiors Inc. dba Skyline Construction Inc. with the correct address is available for each of the three California locations.



- c. **Representative Contact:** Select the appropriate **Representative Contact** from the dropdown list. If the contact does not exist, click “**Add Contact**” and complete the fields.

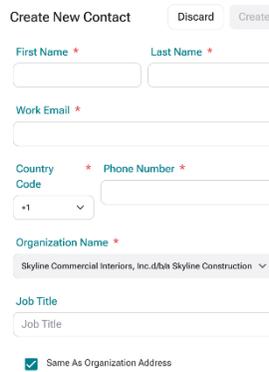
If the Organization is not listed:

1. Click **"Add New Organization"** and complete the required fields. Please always be sure to use the *full legal entity name*



2. Then click **"+ Add Contact"** to associate a representative.

Select the correct contact from the dropdown list. If the contact does not exist, select **"Add Contact"** and complete the fields.



3. Select **"Create."**

Repeat this process for each required Team Member (Architect, Owner, and Skyline). Project team members created in the project will be saved to the Company Directory.

Reminder: All Project Team members must be added before finalizing contract documents in Catina.

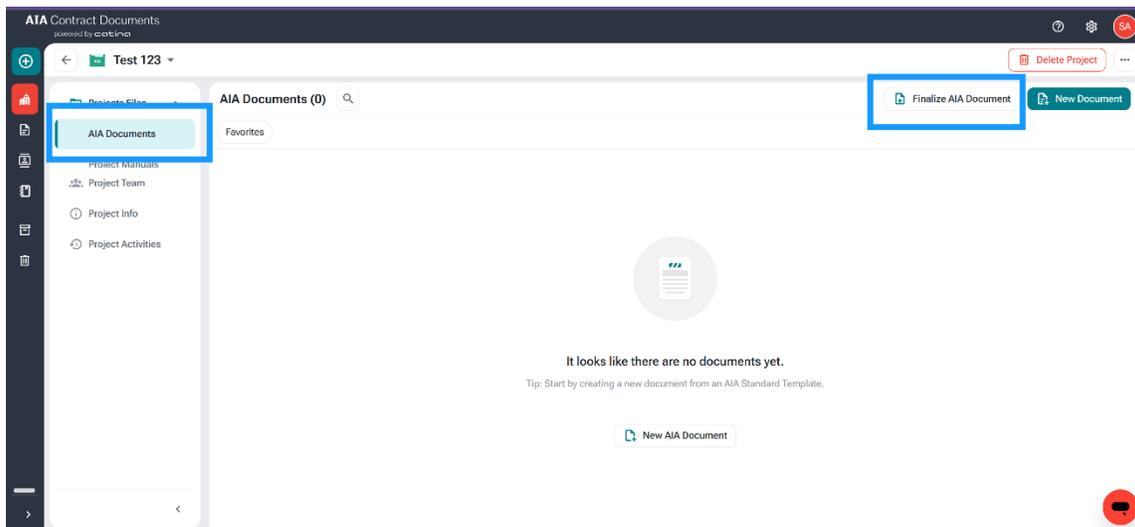
FINALIZE CONTRACT TEMPLATE IN CATINA

Once you have completed the project setup in Catina, the next step is to finalize the contract documents using the 'Clean' template(s) received from Legal.

The finalized contract will then be ready to be executed in DocuSign (preferred) or returned to the Project Manager for execution via mail.

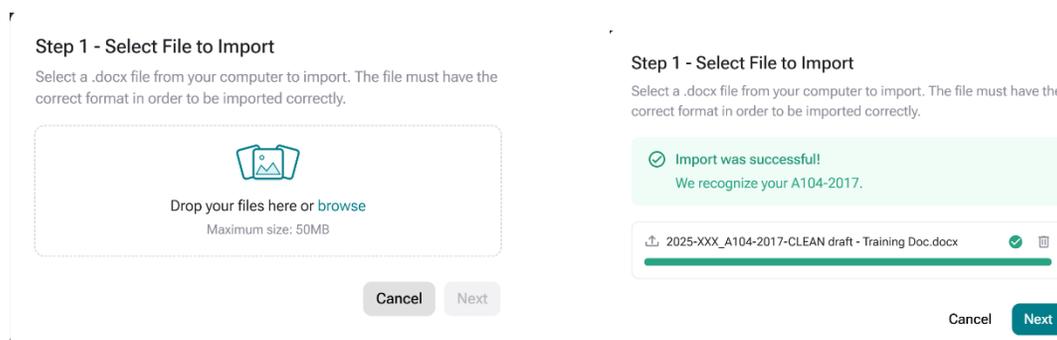
Step 1: Import the Contract Template.

1. Go to “AIA Documents” tab
2. Select “Finalize AIA Document”



1. Click "**Step 1 Select File to Import / Browse**" and select the 'Clean' Skyline AIA Draft Template from the project Contract Folder.

- If recognized successfully, you will see a green banner ("We recognize..."). Click "**Next.**"



- * Note - If the document is **not recognized**, an error will appear. Please reach out to **Gina Bagnariol-Benavides** (ginab@skylineconstruction.build) for troubleshooting.

- A window will pop up asking if you want to rename the document. If the project name or # is not included, it is suggested to add it here.

- No action needed:** Click **"Continue."**

Step 2 - Name your Document

Enter a document name for your document.

Document Name *



- If prompted to **Select a Project** (you were not in the correct project at upload):

- Select the appropriate project (newest projects appear at the top) and click **"Finish."**

Step 3 - Select A Project

Select a project for your document or create a new one.

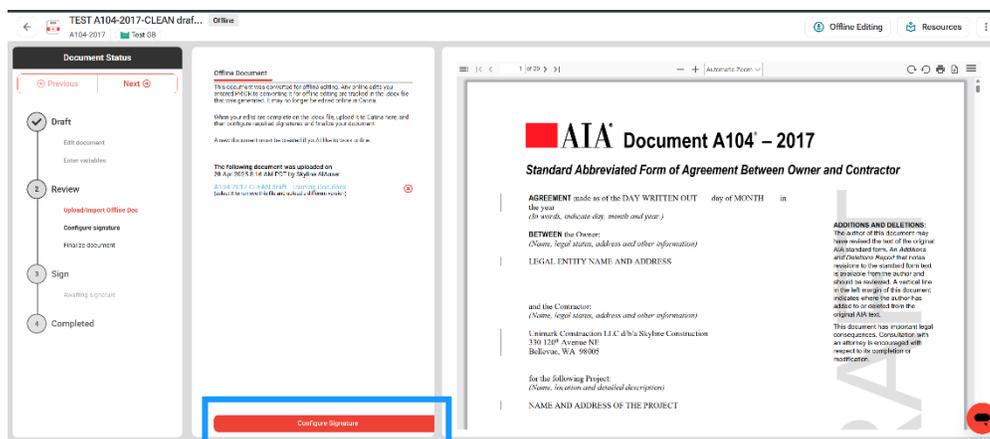
Q Search + New Project

- TEST GINA 1
Last Updated: 4/10/25
- The Estate Misc Scopes
Last Updated: 4/7/25
- Unity - 150 Minna
Last Updated: 4/7/25
- Blitz Tenant Improvement
Last Updated: 4/7/25
- SIFT
Last Updated: 4/7/25



Step 2: Configure and Finalize Signature Setup

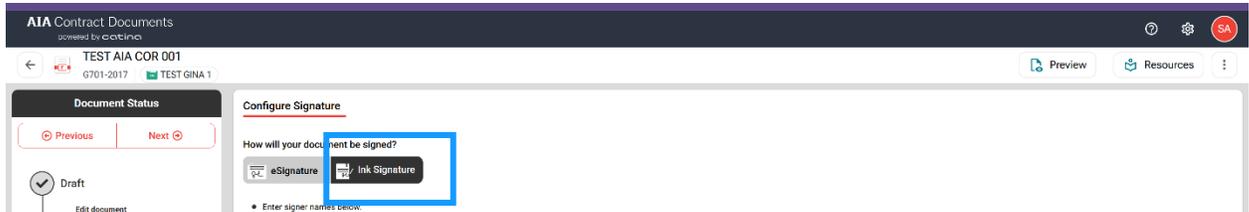
- The document will populate within the project where you will **"Configure Signature."**



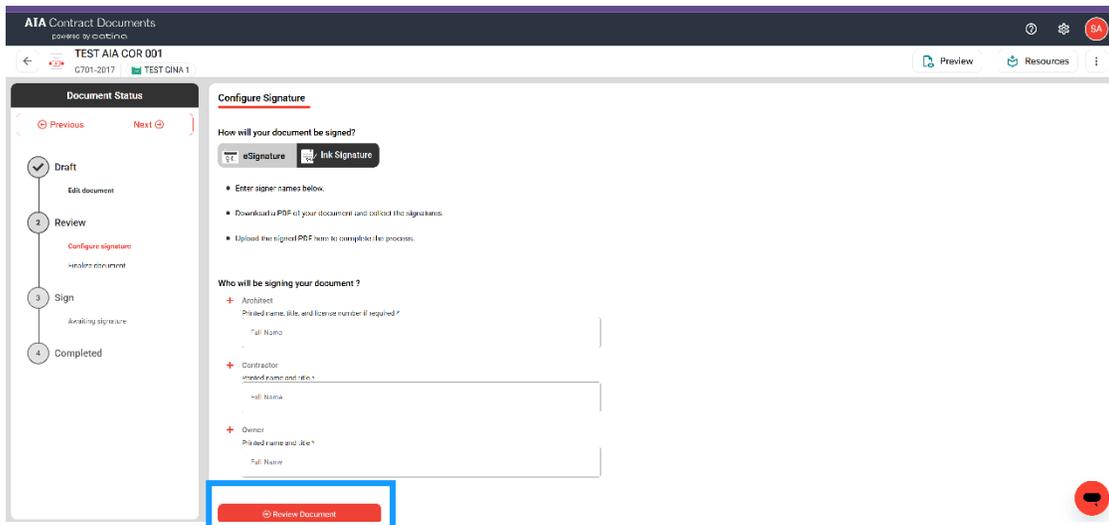
The screenshot shows the AIA software interface. On the left, a 'Document Status' sidebar shows a progress bar with steps: Draft, Review, Sign, and Completed. The 'Review' step is active, with sub-steps 'Configure signature' and 'Finalize document'. The main area displays an 'Offline Document' warning and a list of documents. A red button labeled 'Configure Signature' is highlighted at the bottom. On the right, a preview of the 'AIA Document A104 - 2017 Standard Abbreviated Form of Agreement Between Owner and Contractor' is shown.

- You will have the option of 'eSignature' or 'Ink Signature.' Always choose the ***"Ink Signature"*** option.

Note: AIA Catina's internal e-signature feature is not currently used. Final contracts will be downloaded and sent separately through DocuSign.



- You will need to have the applicable "signer" information for both the Owner and Skyline. **You cannot bypass this section.** Complete the signature fields with both the Owner signer information and Skyline's signer including full name and title if possible.



Select **"Review Document"**

- You will confirm the signing authority for the D401 Certification of Document's Authenticity. This will be the same as the Skyline signer. Once confirmed all looks good, select **"Finalize Document"** and Close Document.

Name of signing authority for the D401 Certification of Document's Authenticity

Finalize Document

Once the contract template is finalized, complete this process for any additional AIA documents (i.e., Exhibit A – Determination of the Cost of the Work).

- Return to the project home page where you will download the finalized AIA documents. These will be sent to the Project Manager for final approval before creating the Project Manual.

CREATE THE PROJECT MANUAL

The Project Manual is the complete contract package signed by the Owner and Skyline. Standard process will be to create the Project Manual in Catina and save to the drive.

Before You Begin

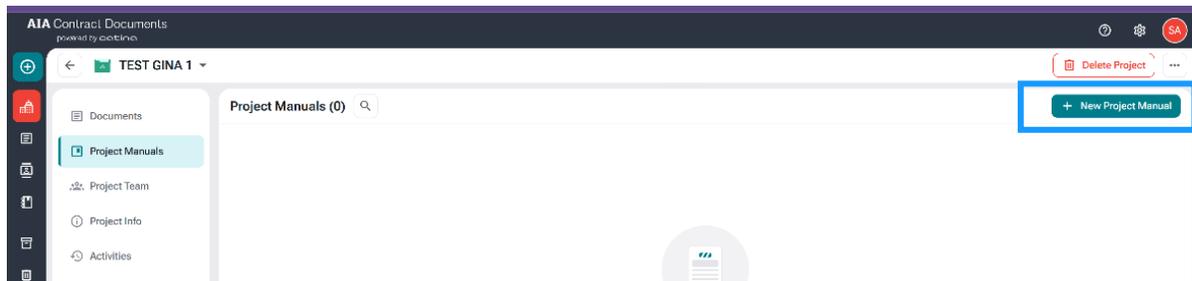
Make sure the following is completed before starting:

- **Confirm Exhibits:** Check that all required contract exhibits are saved in the correct project folder on your shared drive. Refer to Section 6.1.7/2 “Other Documents” in the AIA contract template to see which exhibits are needed. Be sure to include the Contractor Labor Rates exhibit specific to your region.
- **Title Documents Clearly:** Each exhibit should be titled with its exhibit name.
- **Convert to PDF:** Make sure all exhibits are saved as PDF files.
- **Combine Files:** Merge all exhibit PDFs into one document titled “Contract Exhibits” and save it in the Project Contract folder on the drive.

Once all of the above is done, you are ready to create the Project Manual:

Steps to Create the Project Manual

1. Go to the project **Home Page** in Catina and click **“Project Manuals.”**
2. Select **“New Project Manual.”**



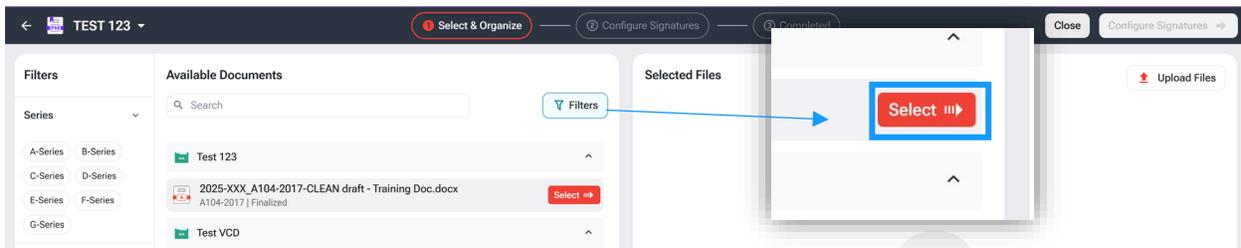
3. A window will open titled **“Create New Project Manual.”**
 - Name the manual using this format:
“Project #, Project Name_Contract for Construction
Example: 20-25-00XX NAME OF PROJECT_CONTRACT FOR CONSTRUCTION
 - Click **“Create.”**

Create New Project Manual

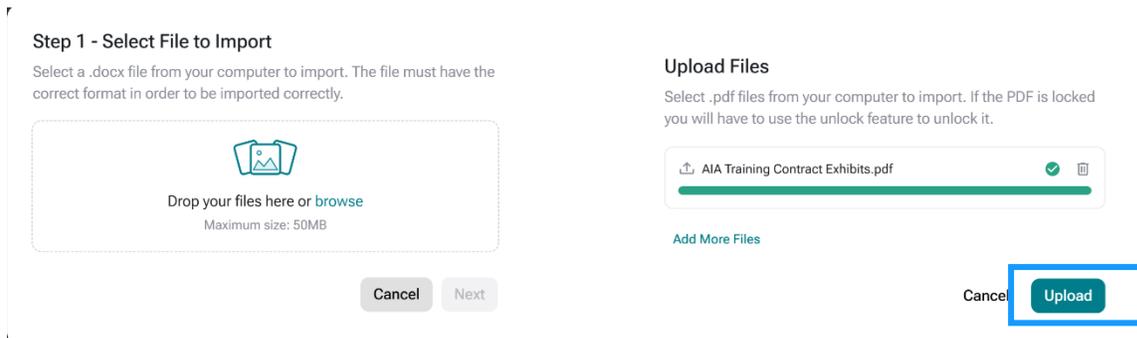
Enter the new name for your project manual.

You will now add files to the Project Manual. A list of available documents will populate in the Available Documents screen. The list will include all documents in the system separated by project. The project you are working in and the documents you just created will be at the top of the list.

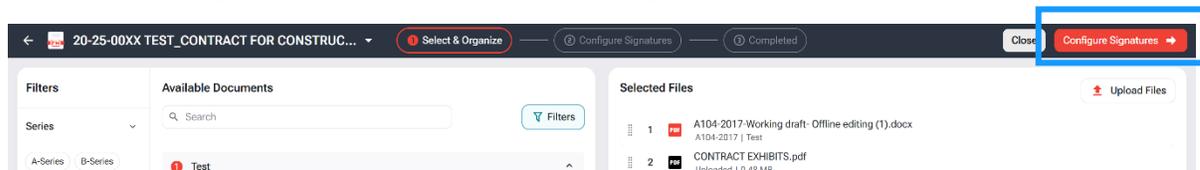
4. In the **Available Documents** list under the applicable green project file folder, find and select any AIA documents created for the project.
 - Click the red **“Select”** button for each relevant document.



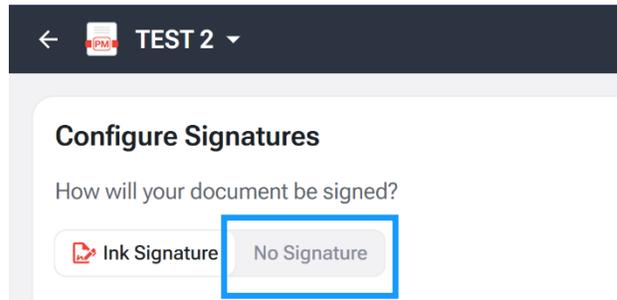
5. Once all AIA documents have been added, click **“Upload Files”** to upload the **Contract Exhibits PDF** you saved earlier in the project Contract folder.



After uploading all documents, click **“Configure Signatures.”**



6. Choose “**No Signature Required**” and then click “**Complete.**”



7. Download the final Project Manual and save it in the **Project Contract** folder.

Note: If you need to remove the **Additions and Deletions Report**, print the document using **Microsoft Print to PDF** (printing to Adobe PDF will not work for this).

CREATE AN AIA G701-2017 CHANGE ORDER

When a Project Manager is required to submit an AIA Change Order (COR), it will be processed through **Catina** using the AIA G701-2017 form. The basis of the COR will almost always be the Prime Contract Change Orders (PCCOs) that have already been approved in **Procore** for the project.

Before You Begin

- Combine all backup documents related to the COR into a **single PDF**.
- Save the PDF to the **Change Order** folder in the project's shared drive.

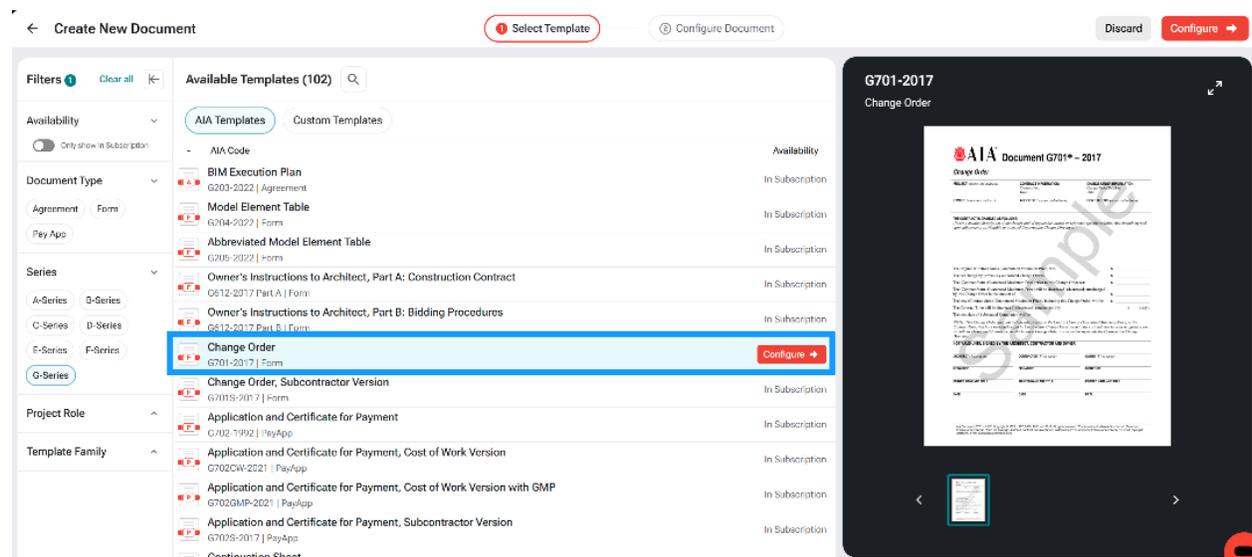
Steps to Create a Change Order in Catina

1. From the “Project Files” tab select the **AIA Documents Tab** , click **“New Document.”**



2. In the list of AIA templates:

- Select the **“G Series.”**
- Choose **“Change Order G701-2017”** and click **“Configure.”**



3. You will see a list of project team members added during setup.

- Select the **Owner, Architect, and Contractor**.
- Click **“Continue.”**
- *Note: If you skipped this step during project setup, you will need to enter the names manually.*

Auto-fill from Project Team Members

The following Project Team roles from TEST GINA 1 can be used to auto-populate your G701-2017 document. Optional: Select roles to auto-fill or continue without auto-filling.

Owner		
-	Organization	Representative Contact
<input checked="" type="checkbox"/>	110 N Wacker Titleholder ...	-

Architect		
-	Organization	Representative Contact
<input checked="" type="checkbox"/>	AAI Architecture + Interior ...	Philip Nettle

Contractor		
-	Organization	Representative Contact
<input checked="" type="checkbox"/>	Skyline Commercial Interi...	Gina Bagnariol-Benavides

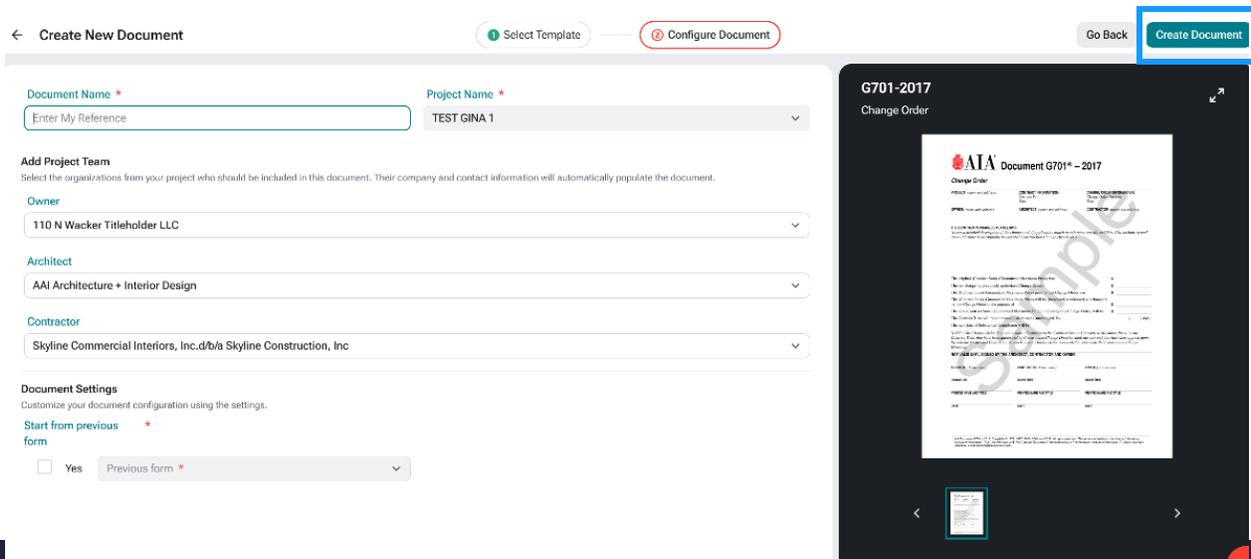
Skip [Continue](#)

4. Name the document using this format:

Project # / Project Name / AIA Change Order #00X

Then click **“Create Document.”**

- If previous AIA CORs exist, select **“Yes – Start from previous form.”**
 - **Note ~ if you are processing an AIA COR for a ‘Migrated’ project you will need to manually populate all information for the COI. Any subsequent COIs completed in Catina will auto populate as normal.**
- Choose the most recent COR from the dropdown to carry over key data. The dropdown list will populate with all past AIA CORs.
- Click **“Create Document.”**



← Create New Document Select Template Configure Document Go Back Create Document

Document Name * Project Name * TEST GINA 1

Enter My Reference

Add Project Team
Select the organizations from your project who should be included in this document. Their company and contact information will automatically populate the document.

Owner
110 N Wacker Titleholder LLC

Architect
AAI Architecture + Interior Design

Contractor
Skyline Commercial Interiors, Inc.d/b/a Skyline Construction, Inc

Document Settings
Customize your document configuration using the settings.

Start from previous form *

Yes Previous form

G701-2017 Change Order

AIA Document G701® – 2017

Change Order

Project Name: TEST GINA 1
Project Number: 110 N WACKER TITLEHOLDER LLC
Contractor: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

1.1 OWNER'S NAME: TEST GINA 1
1.2 PROJECT NAME: 110 N WACKER TITLEHOLDER LLC
1.3 CONTRACTOR: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

2.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
2.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

3.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
3.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

4.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
4.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

5.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
5.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

6.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
6.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

7.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
7.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

8.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
8.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

9.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
9.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

10.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
10.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

11.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
11.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

12.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
12.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

13.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
13.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

14.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
14.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

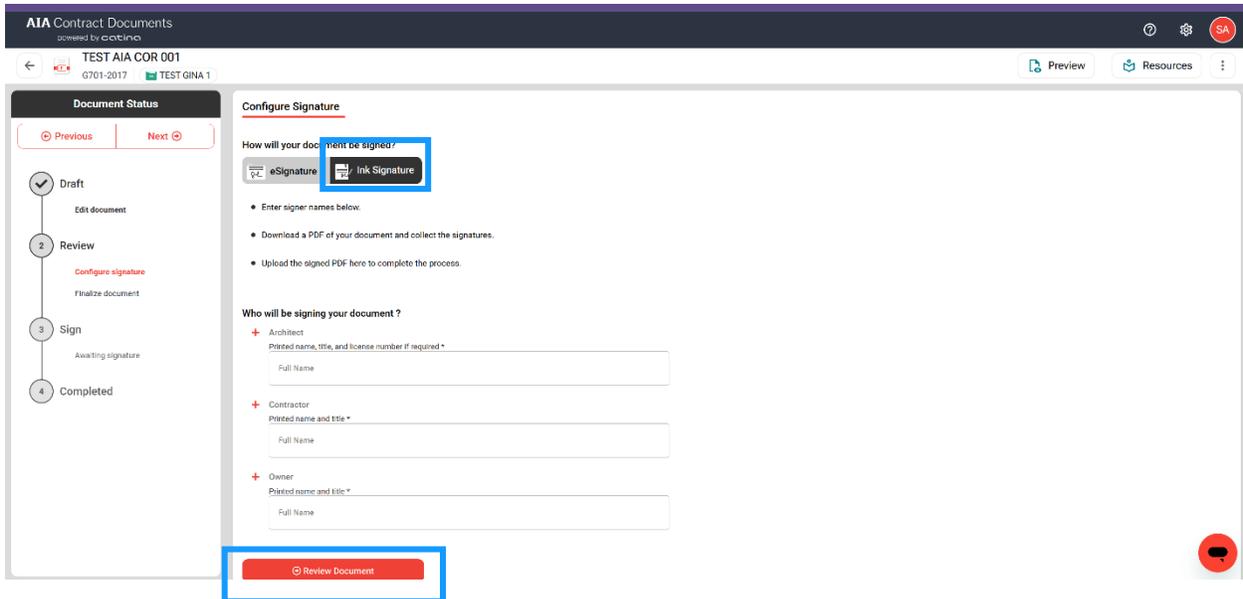
15.1 PROJECT NUMBER: 110 N WACKER TITLEHOLDER LLC
15.2 CONTRACTOR NUMBER: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION, INC.

5. Fill out the change order details:

- **Contract For** – Description of the contract
- **Contract Date** – Update to the Prime Owner Contract date
- **Change Order Date** – Use current date
- **Description of Change** – List all of the Procore PCCOs or PCOs included in this COR, or as directed by the Project Manager
- **Original Contract Sum** – Auto-fills after the first COR
- **Net Change by Previous CORs** – Will be zero for COR 001; auto-fills afterward
- **Contract Sum Before This COR** – Auto-filled
- **Amount of This COR** – Enter the dollar amount; the system will adjust labels (unchanged, changed, decreased) accordingly
- **New Contract Sum** – Auto-calculated
- **Contract Time Change (Days)** – Enter the number of added/removed days, if any (get from PM or PCCO) – NEVER LEAVE BLANK
- **New Substantial Completion Date** – Provided by PM or in PCCOs
- **Note:** This section can be edited if the PM requests additional information about this COR to be added.
- Click **“Next.”**

6. **Configure Signatures:**

- Select **“Ink Signature.”**
- Enter full names (and titles, if possible) for the Architect, Owner, and Skyline signers.
- If the Architect is not signing, enter **“N/A.”**
- Click **“Review Document.”**

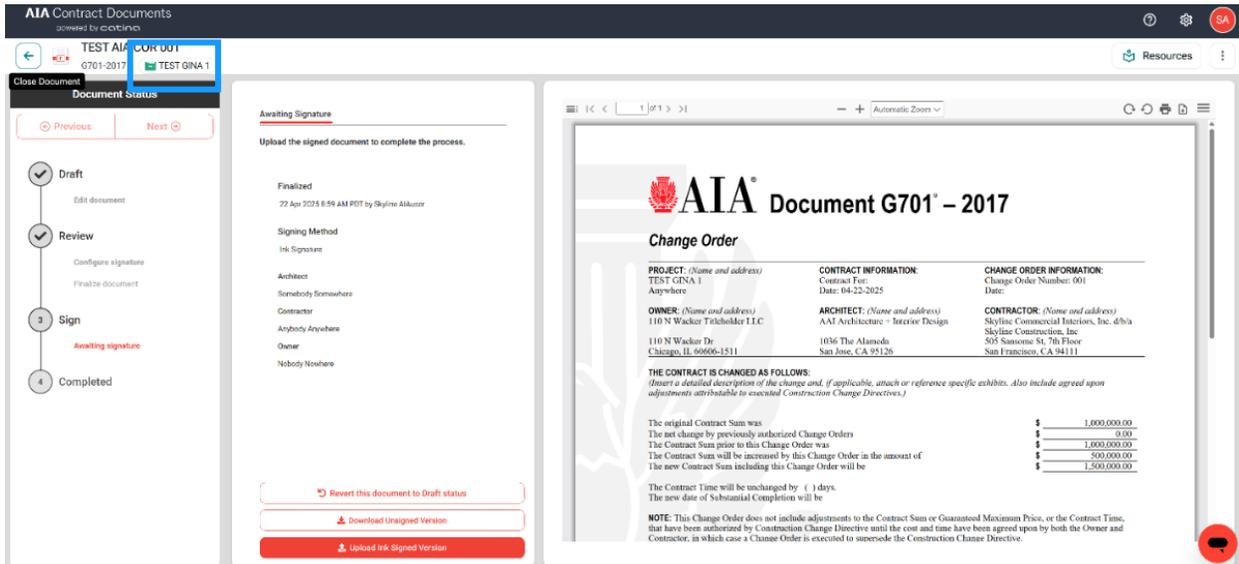


7. Review all details:

- If correct, click **“Finalize Document.”**
- If edits are needed, click **“Previous”** to go back and make changes.

8. Download the unsigned AIA COR and send it to the Project Manager for review:

- Click **“Download Unsigned Version.”**
- Then click green folder to return to the project home screen.



9. Once the PM approves, follow the instructions from **Section 3** to **create the Project Manual** including the COR and download the full package to save to the project Change Order folder on the share drive. (Suggestion: Create and AIA COR folder within the Change Order folder). Confirm with PM if this will be sent via DocuSign or sent directly to owner for execution