

OSA Template Instructions

Before utilizing any OSA template, agencies and institutions should familiarize themselves with the OSA Project Management Policies and Procedures and/or reference Energy Performance Contract documents available on the [OSA Energy & Environment webpage](#).

Many of these templates are fillable Word documents. Select the document you need. It will download automatically to your desktop OR you can go to your "Downloads" file folder. Select and open the downloaded document. A yellow banner will populate with "Protected View" and "Enable Editing". Use the "Enable Editing" feature. Most documents are unlocked so you will be able to edit them as a form. To view the Note to Drafter/Comments, select the bubble at the right of the document text. Read through the comments and close the comment bubble OR, on the Toolbar, you can select "Review" and "Simple Markup" should be selected. To view ALL SBP comments at the same time, select "All Markup". Revert back to "Simple Markup" to hide. Delete comments as complete.

Or when printing, select "Settings" then select the "Print All Pages" dropdown menu. There, toward the bottom, you will find "Print Markup" this should be unchecked to print without Comments.

