

format aia document g702

Formatting AIA Document G702: A Comprehensive Guide for Architects and Contractors

Introduction:

So, you're wrestling with AIA Document G702, the Application and Certificate for Payment? Don't worry, you're not alone. This crucial document, used in countless construction projects across the US, can seem daunting at first glance. This comprehensive guide will demystify the AIA G702 format, walking you through each section, explaining its purpose, and providing practical tips to ensure accurate and timely completion. We'll cover everything from understanding the basic structure to navigating common complexities, leaving you confident in handling this essential piece of construction paperwork. Let's dive in!

Understanding the Purpose of AIA Document G702

AIA Document G702 serves as the primary mechanism for contractors to request payment from the owner during a construction project. It's not just a simple invoice; it's a formal application that meticulously details the work completed, the value of that work, and any deductions or retainage. This ensures transparency and accountability between the owner, the architect, and the contractor. Its proper completion safeguards both parties from potential disputes later in the project.

Key Sections of the AIA G702 and Their Proper Formatting

The G702 is designed with a clear, logical structure. Let's break down each key section and discuss optimal formatting:

1. **Project Information:** This section at the top requires accurate information regarding the project name, address, project number, and the names and addresses of the owner and contractor.
Formatting Tip: Use clear, concise language. Double-check addresses for accuracy to avoid delays.
1. **Dates:** Accurate and consistent dating is crucial. This section includes the date of the application, the period of work covered by the application, and the date of the contractor's previous application.
Formatting Tip: Use the MM/DD/YYYY format for consistency and clarity.
1. **Previous Certificate Numbers:** This section references previous G702 applications. Accurately referencing the previous certificate number is essential for tracking payments throughout the

project's lifecycle. Formatting Tip: Leave this section blank for the initial application.

1. **Description of Work:** This is arguably the most important section. It requires a detailed description of the work completed during the specified period. Formatting Tip: Be specific and use clear, concise language. Reference relevant contract documents or drawings as needed. Organize the information logically, perhaps by trade or phase of construction. Avoid vague terms; quantifiable descriptions are ideal (e.g., "Installed 500 sq ft of tile flooring" instead of "Partial tile installation").
1. **Current Payment Requested:** Here you state the total amount due for the work completed during the period covered by the application. Formatting Tip: Ensure this amount aligns precisely with the values detailed in the "Description of Work" section. Show your calculations clearly, if necessary, on a separate sheet attached as an exhibit.
1. **Amounts Previously Certified:** This section indicates the total amount certified on previous applications. This is essential for tracking the cumulative payment amounts throughout the project. Formatting Tip: Ensure accuracy by referencing previous G702 certificates.
1. **Retainage:** This section details any retainage held back by the owner per the contract terms. Formatting Tip: Clearly indicate the retainage percentage and the dollar amount withheld.
1. **Deductions:** This section lists any deductions from the payment request. This could include items like adjustments for incomplete work, change orders, or other deductions as outlined in the contract. Formatting Tip: Specify the reason for each deduction clearly and support them with documentation.
1. **Net Payment Due:** This represents the final amount due to the contractor after all deductions and retainage are considered. Formatting Tip: This amount should be the result of a clear calculation based on the previous sections.
1. **Contractor's Certification and Signatures:** This crucial section requires the contractor's signature and printed name, certifying the accuracy of the information provided. Formatting Tip: Ensure all signatures are legible. A company stamp or seal may also be required depending on your

contract.

1. Architect's Certification and Signatures: The architect certifies the work and verifies the contractor's request for payment. This section requires the architect's signature, indicating their approval of the payment application. Formatting Tip: The architect may have their own internal process for reviewing and approving the G702.

Software and Tools for Formatting AIA G702

While the G702 can be filled out manually, using software can significantly reduce errors and improve efficiency. Many construction management software packages incorporate AIA forms, allowing for automated calculations and streamlined workflows. Microsoft Word or similar word processing software can also be used, but extra caution is required to ensure accurate formatting and calculations.

Avoiding Common Mistakes When Formatting AIA Document G702

Inconsistent Dates: Always use the same date format throughout the document.

Unclear Descriptions of Work: Vague descriptions can lead to disputes. Be specific and quantifiable.

Mathematical Errors: Double-check all calculations meticulously.

Missing Signatures: Incomplete signatures delay payments and can cause friction.

Inconsistent Formatting: Maintaining consistent font size, spacing, and alignment contributes to readability and professionalism.

Conclusion:

Mastering the AIA G702 format is a crucial skill for both architects and contractors. By understanding the purpose of each section and following best practices for formatting and documentation, you can ensure accurate and efficient payment processing. This streamlined process minimizes potential disputes and fosters a smoother, more collaborative project lifecycle. Remember to always refer to your specific contract for any project-specific requirements or modifications to the standard AIA G702 format.

FAQs:

1. Can I use a generic invoice instead of AIA Document G702? No, using a generic invoice is usually not acceptable. The AIA G702 is a standardized form that ensures all necessary information is included and the process is transparent.

1. What happens if there's a dispute regarding the G702? Disputes over the G702 are typically resolved through negotiation, mediation, or arbitration, as outlined in the project contract.

1. Where can I find a free downloadable AIA G702 form? The AIA website offers various resources, including the G702, but you may need a membership or pay a fee to access and download the latest version.

1. Is it mandatory to use the AIA G702 form? While not always legally mandatory, using the G702 is generally considered best practice and is often required by contracts.

1. Can I modify the AIA G702 form? Minor modifications may be acceptable if agreed upon by all parties and are clearly documented, but significant alterations are generally discouraged as they can create inconsistencies and potential disputes.

Additional Resources

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