

# How to E-Sign and Complete Our Lien Waiver Requests

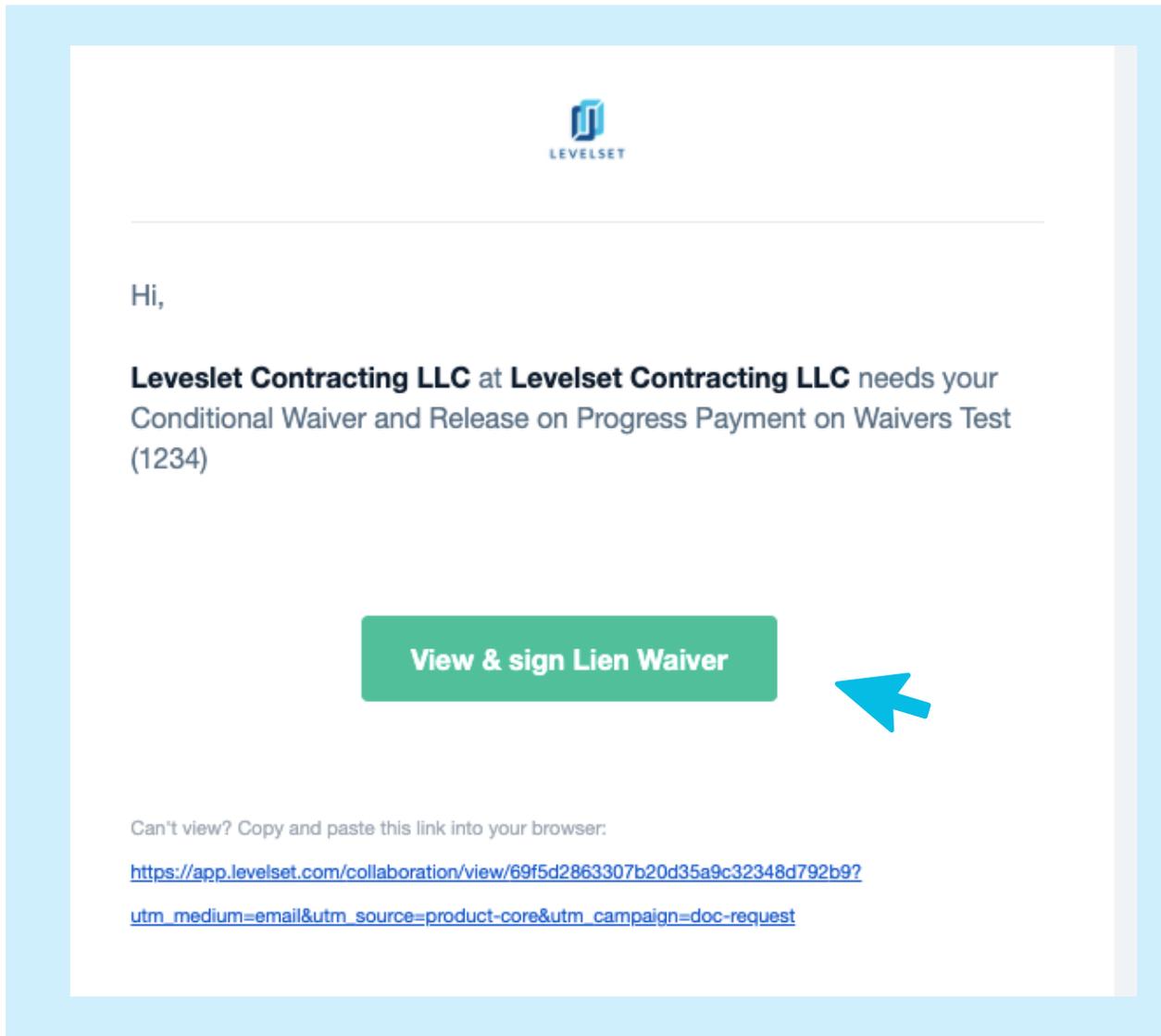


LEVELSET  
Payment help is here.

We're transitioning to using Levelset to request and collect e-signed waivers from our subcontractors and their vendors. These instructions explain how to provide us with e-signed waivers.

**1** **Step One:** Our waiver request will come via email with the subject line “[Our Company Name] has requested a Lien Waiver from you”.

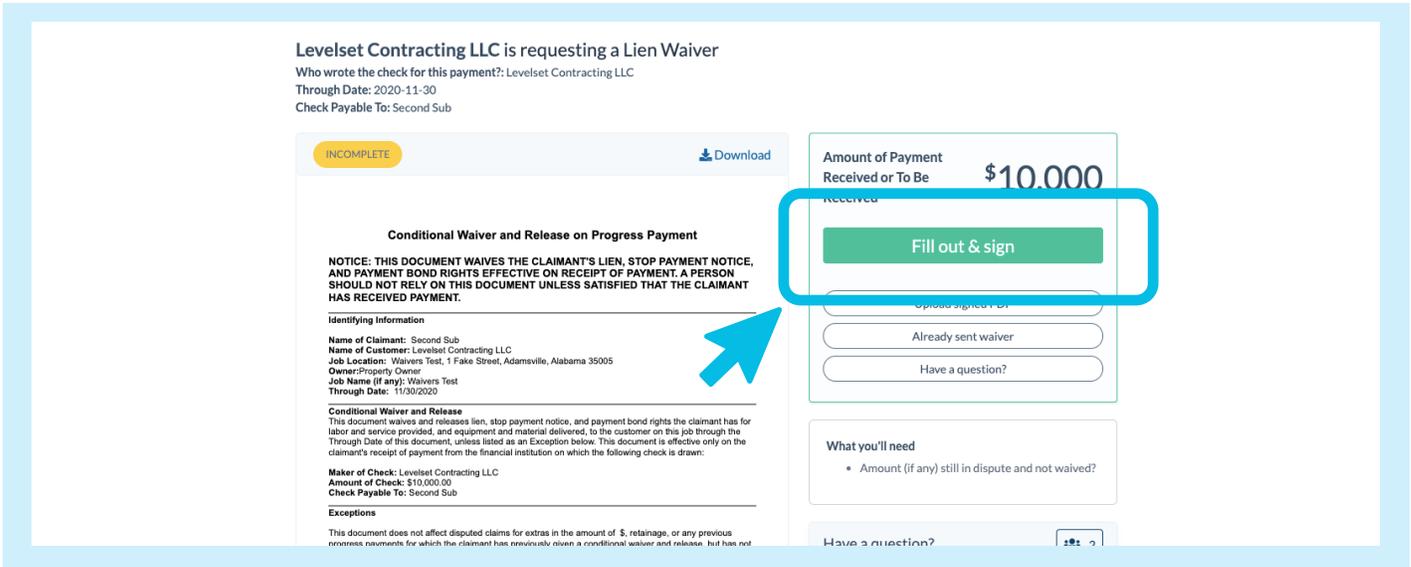
Click the green **View & Sign Lien Waiver** button in the email to open a landing page where you sign the document.



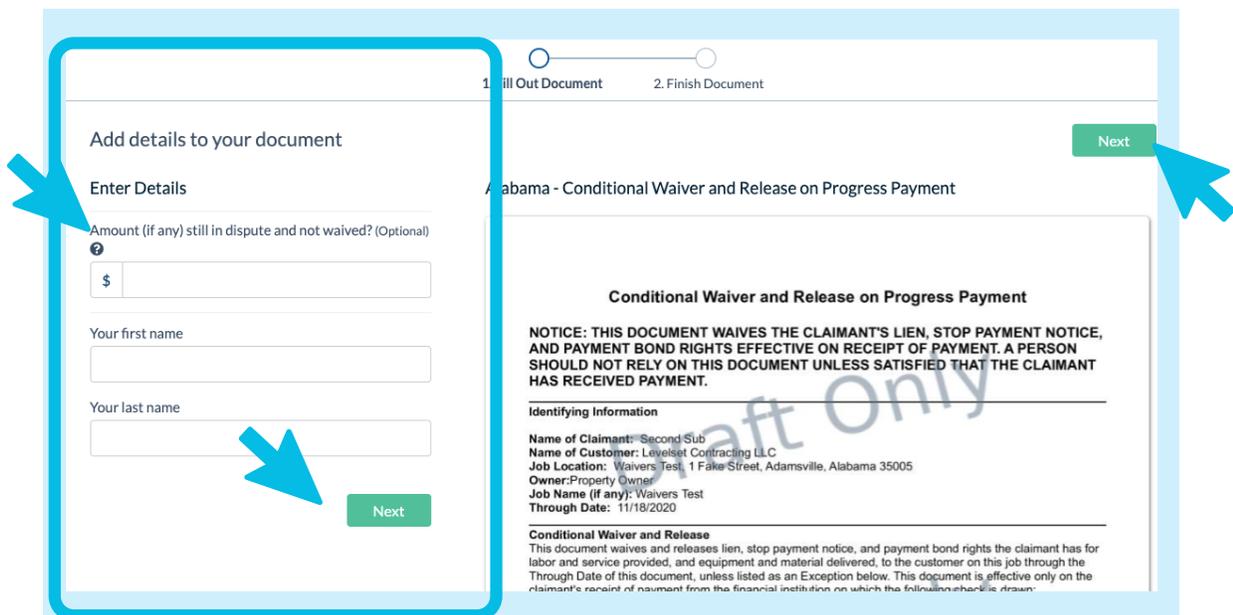
Need help? Call Levelset's five-star Support team at 855-927-2737 or email [mail@levelset.com](mailto:mail@levelset.com).

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**2** Step Two: Fill out the document. On the landing page click the **Fill out & Sign** button in the top right corner of the page.



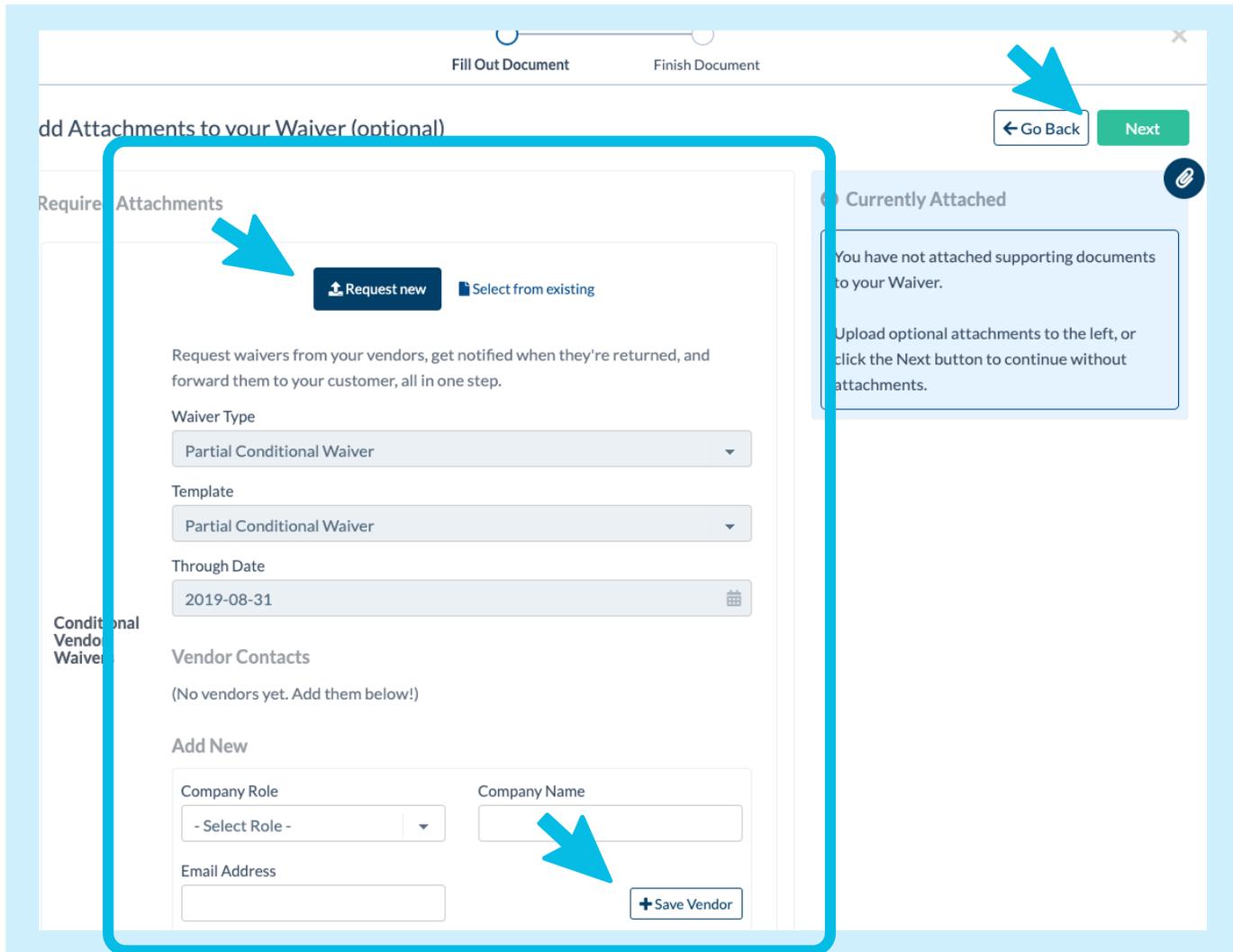
**3** Step Three: Fill Out Document Details. Enter any necessary Document Details on the left, and view a preview of the waiver on the right. Then click **Next**.



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- 4 Step Four: Request vendor waivers.** We may require you to request/collect waivers from each of your subcontractors and suppliers. We may need signed waivers from each of your vendors before we can release payment to you.

To request waivers from your vendors, choose any existing Vendor Contacts that we know you hired on the job, or add new vendor contacts under the **Add New** section of the page (highlighted below).



**Helpful Tip:** If you do not have any vendors, scroll all the way to the bottom of the page and check off the box "I don't have any vendors."

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**4** Step Five: E-Sign the document. On the last step, enter your first and last name to apply an e-signature on the waiver. Then click **Accept Terms & Send Document** to return your signed waiver to us and send your emailed waiver requests to your vendors.

That's it! That's all you need to do. Thank you for completing our lien waiver request.

The screenshot shows the final step of the e-signature process. At the top, there are two progress indicators: "1. Fill Out Document" and "2. Finish Document". A blue arrow points to a green button labeled "Accept Terms and Send Document". Below this button is a note: "Clicking Send Document above means you agree to the Terms of Service." On the left side, a blue-bordered box highlights the "Who should receive this document?" section, which includes an "eSign" tab and a signature field containing the name "Ford Sutter". Below the signature field is an "Update Signature" button. To the right of the signature field, there are "Print + Sign" options. Below the signature field, there is a promotional message: "Spend less time chasing down this payment. Your customer will have the option to pay you through Levelset after receiving this document. There is a \$300 fee if you get paid. Learn more." Below this is a "General Contractor" section with a "Requester" button and contact information for Levelset Contracting LLC. At the bottom left, there is an "Add Recipient" dropdown menu. The main document content is titled "Alabama - Conditional Waiver and Release on Progress Payment" and includes a "Conditional Waiver and Release on Progress Payment" section with a bold notice: "NOTICE: THIS DOCUMENT WAIVES THE CLAIMANT'S LIEN, STOP PAYMENT NOTICE, AND PAYMENT BOND RIGHTS EFFECTIVE ON RECEIPT OF PAYMENT. A PERSON SHOULD NOT RELY ON THIS DOCUMENT UNLESS SATISFIED THAT THE CLAIMANT HAS RECEIVED PAYMENT." Below this is an "Identifying Information" section with fields for Name of Claimant, Name of Customer, Job Location, Owner, Job Name, and Through Date. This is followed by a "Conditional Waiver and Release" section with a detailed disclaimer, a "Maker of Check" section with fields for Name, Amount, and Payable To, and an "Exceptions" section with a disclaimer. At the bottom right, there is a "Signature" line.

Last Updated: September 2021

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