

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

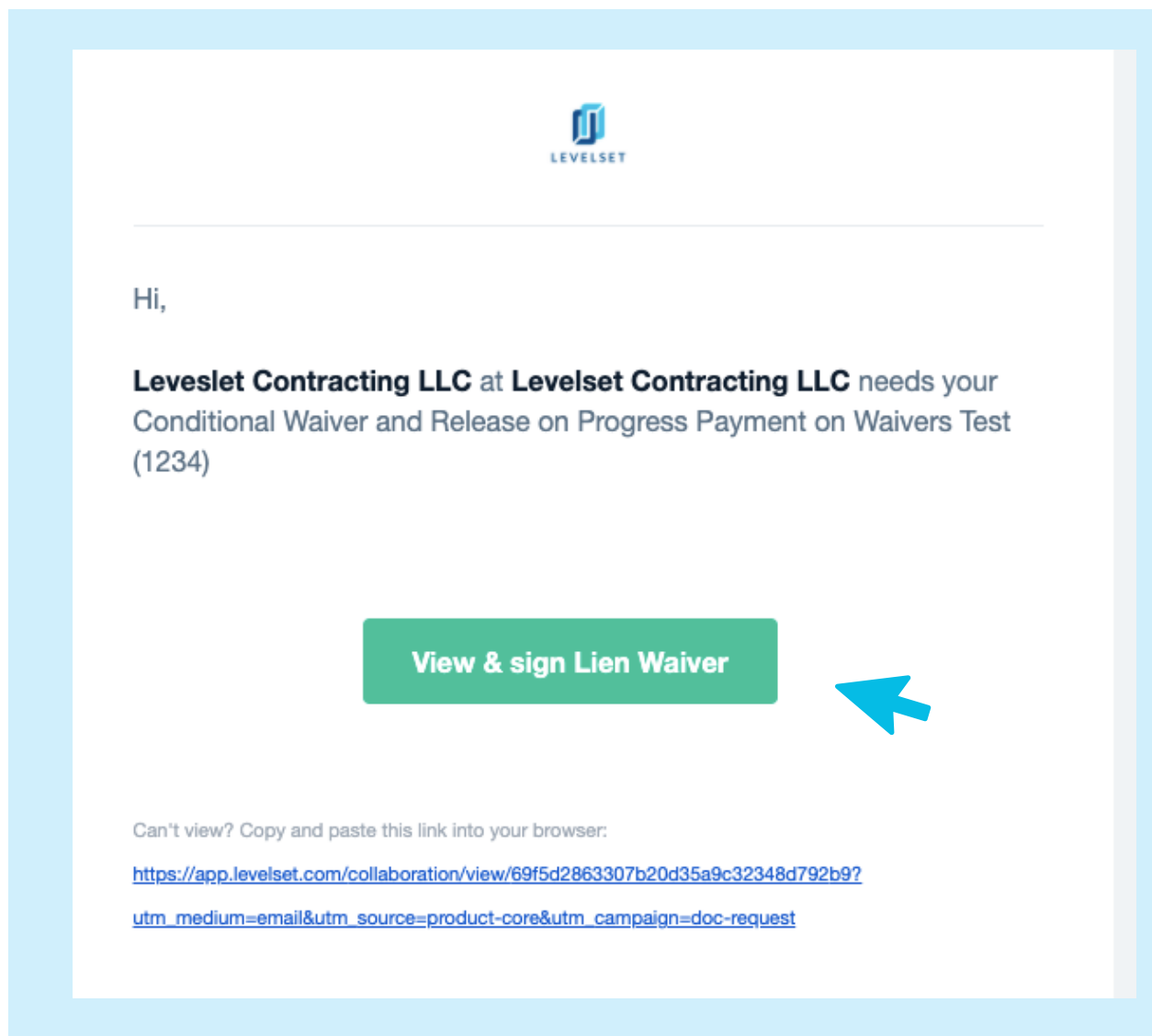


LEVELSET  
Payment help is here.

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.

Levelset Contracting LLC is requesting a Lien Waiver  
Who wrote the check for this payment?: Levelset Contracting LLC  
Through Date: 2020-11-30  
Check Payable To: Second Sub

INCOMPLETE Download

**Conditional Waiver and Release on Progress Payment**

**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.**

**Identifying Information**

Name of Claimant: Second Sub  
Name of Customer: Levelset Contracting LLC  
Job Location: Waivers Test, 1 Fake Street, Adamsville, Alabama 35005  
Owner: Property Owner  
Job Name (if any): Waivers Test  
Through Date: 11/30/2020

**Conditional Waiver and Release**  
This document waives and releases lien, stop payment notice, and payment bond rights the claimant has for labor and service provided, and equipment and material delivered, to the customer on this job through the Through Date of this document, unless listed as an Exception below. This document is effective only on the claimant's receipt of payment from the financial institution on which the following check is drawn:

**Maker of Check:** Levelset Contracting LLC  
**Amount of Check:** \$10,000.00  
**Check Payable To:** Second Sub

**Exceptions**  
This document does not affect disputed claims for extras in the amount of \$, retainage, or any previous progress payments for which the claimant has previously given a conditional waiver and release, but has not

Amount of Payment Received or To Be **\$10,000**

**Fill out & sign**

Upload signed PDF  
Already sent waiver  
Have a question?

**What you'll need**

- Amount (if any) still in dispute and not waived?

Have a question?

- 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**.

1. Fill Out Document 2. Finish Document

**Add details to your document**

**Enter Details**

Amount (if any) still in dispute and not waived? (Optional)  
\$

Your first name

Your last name

**Next**

**Alabama - Conditional Waiver and Release on Progress Payment**

**Conditional Waiver and Release on Progress Payment**

**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.**

**Identifying Information**

Name of Claimant: Second Sub  
Name of Customer: Levelset Contracting LLC  
Job Location: Waivers Test, 1 Fake Street, Adamsville, Alabama 35005  
Owner: Property Owner  
Job Name (if any): Waivers Test  
Through Date: 11/18/2020

**Conditional Waiver and Release**  
This document waives and releases lien, stop payment notice, and payment bond rights the claimant has for labor and service provided, and equipment and material delivered, to the customer on this job through the Through Date of this document, unless listed as an Exception below. This document is effective only on the claimant's receipt of payment from the financial institution on which the following check is drawn:

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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).

The screenshot shows the 'Fill Out Document' step of the Levelset Lien Waiver Request process. The form is titled 'Add Attachments to your Waiver (optional)' and includes a progress bar at the top with 'Fill Out Document' and 'Finish Document' steps. A blue arrow points to the 'Next' button in the top right corner. Another blue arrow points to the 'Request new' button under the 'Required Attachments' section. A third blue arrow points to the 'Company Name' input field in the 'Add New' section. The 'Required Attachments' section includes a 'Request new' button, a 'Select from existing' button, and a description: 'Request waivers from your vendors, get notified when they're returned, and forward them to your customer, all in one step.' Below this are dropdown menus for 'Waiver Type' and 'Template', both set to 'Partial Conditional Waiver', and a 'Through Date' field set to '2019-08-31'. The 'Vendor Contacts' section shows '(No vendors yet. Add them below!)' and an 'Add New' section with fields for 'Company Role' (set to '- Select Role -'), 'Company Name', and 'Email Address', followed by a '+ Save Vendor' button. A 'Currently Attached' section on the right states: 'You have not attached supporting documents to your Waiver. Upload optional attachments to the left, or click the Next button to continue without attachments.'

**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 tabs: "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, a note states: "Clicking Send Document above means you agree to the [Terms of Service](#)."

The main content area is divided into two columns. The left column is titled "Who should receive this document?" and has two sub-sections: "eSign" and "Print + Sign". The "eSign" section shows a signature box with the name "Ford Sutter" and an "Update Signature" button. Below this, there is a green box with the text: "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](#)". At the bottom of the left column, there is a "General Contractor" section with a "Requester" button. The requester information is: "Levelset Contracting LLC", "1 Fake Street", "New Orleans, Louisiana", "70130", "sarah+123@zlien.com". There is also an "Add Recipient" button.

The right column is titled "Alabama - Conditional Waiver and Release on Progress Payment". It contains the following text: "Conditional Waiver and Release on Progress Payment", "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.", "Identifying Information", "Name of Claimant: Second Sub", "Name of Customer: Levelset Contracting LLC", "Job Location: Waivers Test, 1 Fake Street, Adamsville, Alabama 35005", "Owner: Property Owner", "Job Name (if any): Waivers Test", "Through Date: 11/18/2020", "Conditional Waiver and Release", "This document waives and releases lien, stop payment notice, and payment bond rights the claimant has for labor and service provided, and equipment and material delivered, to the customer on this job through the Through Date of this document, unless listed as an Exception below. This document is effective only on the claimant's receipt of payment from the financial institution on which the following check is drawn:", "Maker of Check: Levelset Contracting LLC", "Amount of Check: \$10,000.00", "Check Payable To: Second Sub", "Exceptions", "This document does not affect disputed claims for extras in the amount of \$0.00, retainage, or any previous progress payments for which the claimant has previously given a conditional waiver and release, but has not received payment.", and a "Signature" line.

Last Updated: September 2021

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