

# Send the Right Document at the Right Time Using the Job Summary Page



**LEVELSET**  
Payment help is here.

Let Levelset walk you through each step of protecting your job and prompting quick payment through the job's summary page. Find out what is required of you based on the job details while also seeing optional documents that are helpful in prompting and speeding up payment.

- Step One: Go to the job summary page.** After creating a new job, your account will automatically bring you into the job summary page. Or, if you've already created the job in an earlier session, you can access the job by searching for it with the search bar, or navigating to your **Jobs** tab, hovering over the job, and clicking **View** on the right hand side.

The screenshot shows the Levelset Jobs page. At the top, there's a search bar labeled "Search jobs, documents & contacts". Below it, a dashboard displays several metrics: "Jobs protected" (8), "Jobs at risk" (11), "Jobs missing info" (11), "Job radar alerts" (26), "Deadlines this week" (6), "Deadlines this month" (18), and "Jobs pre-qualified for materials financing" (14). A sidebar on the left contains navigation options: "Create", "Job Radar", "Jobs" (highlighted), "Scout Research", and "Queues". Below the dashboard is a table of jobs with columns for "JOB", "JOB ADDRESS", "JOB TAGS", "OUTSTANDING AMOUNT", and "NEXT DEADLINE". One job is listed: "[FL-Essex] 7550 Uss Essex S... [FL-GC-4] EMR Inc." with an outstanding amount of \$10,401.60 and a next deadline of "File Your Lien Claim Due in 3 months". A "View" button is circled in the bottom right of the job entry.

- Step Two: Figure out required or optional next steps on the job.** On the left side of the job summary page, you'll find all required and recommended documents you'll need to protect your lien rights. The documents and any corresponding deadlines are divided into two sections: **Notice Requirements to Protect Your Job** and **Lien Requirements When You're Not Being Paid**. The documents you see are specific to the job type, your role on the job, and state in which the job is located - information you provided when entering the job.

The screenshot shows the document requirements section. It is divided into two main sections: "Notice Requirements to Protect Your Job" and "Lien Requirements When You're Not Being Paid". Under "Notice Requirements to Protect Your Job", there is a "Preliminary Notice Due" with a deadline of "Due in 2 weeks, on 6/11/2021". Under "Lien Requirements When You're Not Being Paid", there are three items: "Send a Notice of Intent to Lien (Optional)" with a "Create Notice of Intent" button, "Filing of Claim of Lien Due" with a deadline of "Due in 3 months, on 8/26/2021", and "File Suit to Enforce Lien, Release Lien, or File a Lien Extension".

# Send the Right Document at the Right Time Using the Job Summary Page

**3** Step Three: Provide project dates to trigger document deadlines. This information could be your first day on the job, last day, or maybe invoice information. We'll request whatever is needed based on the state's legal requirements. If we are missing the information we need to track a deadline, we'll pin it to the **Actions to Take Right Now** section at the top. You also will see a **Calculate Deadline** button next to the document listed, where you can read about the statute and see what triggers the deadline. As soon as you update the applicable date and click on **Save**, we will start tracking the deadline for you.

The image displays two screenshots of the Levelset software interface. The top screenshot shows the 'Actions to Take Right Now' section with two items: 'See your notice deadlines' (When did you start work?) and 'See your lien deadlines' (When did you finish work?). Each item has a date input field and a 'Save' button. Below this is the 'Notice Requirements to Protect Your Job' section with a 'Preliminary Notice Due' item (Based on Date Labor or Materials First Delivered) and a 'Calculate Deadline' button. The bottom screenshot shows the 'Actions to Take Right Now' section with 'See your lien deadlines' (When did you finish work?) and a 'Create Notice' button. Below this is the 'Notice Requirements to Protect Your Job' section with a 'Preliminary Notice Due' item (Due in 2 weeks, on 5/18/2020. County delays expected!) and a 'Create Notice' button.

★ When you're ready to create and order a specific document, just click the **Create Notice** button that pops up along the right-hand side of the document tracking and follow the steps!

⚡ Interested in learning more about how to create a document in Levelset? Click here for our instructions on [How to Order a Preliminary Notice](#) (all documents follow the same steps).

Last updated: May 2021