



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

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.

- 1 **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 web interface. On the left, there's a sidebar with icons for Create, Job Radar, Jobs (which is highlighted with a blue box), Scout Research, and Queues. The main area is titled 'Jobs' and shows a summary of job status: 8 jobs protected, 11 jobs at risk, 26 job radar alerts, 6 deadlines this week, 18 deadlines this month, and 14 jobs pre-qualified for materials financing. Below this, it says '30 jobs'. There are filters, a 'Customize columns' button, and a '+ New Job' button. A specific job entry for '[FL-Essex] 7550 Uss Essex S...' is shown with a due date of '6/11/2021'. A blue box highlights the 'View' button next to this entry.

- 2 **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 'Notice Requirements to Protect Your Job' section. It lists a 'Preliminary Notice Due' task with a deadline of '6/11/2021'. Below this, the 'Lien Requirements When You're Not Being Paid' section is shown, containing tasks like 'Send a Notice of Intent to Lien (Optional)' (with a note about warn key project stakeholders) and 'Filing of Claim of Lien Due' (with a note about due in 3 months). A green 'Create Notice of Intent' button is visible. A blue box highlights the 'Filing of Claim of Lien Due' item.

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- 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 Job Summary Page. 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 green 'Save' button. The bottom screenshot shows the same section, but the 'See your lien deadlines' item is highlighted with a blue border. Below this section is a 'Notice Requirements to Protect Your Job' section with a 'Preliminary Notice Due' button. This button is also highlighted with a blue border and contains the text 'Due in 2 weeks, on 5/18/2020.' A yellow callout bubble next to the button says 'County delays expected!' To the right of the notice button is a green 'Create Notice' button with a dropdown arrow. Both screenshots have a light blue background and white text.

★ 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).

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