

What I need from you

Payment Application Assembly & Issuance

This list explains what I need for this service, why I need it and where you can usually find it. Send the information together where practical. Tell me straight away about anything unavailable or urgent. I will confirm when the essential information is complete and the delivery date is fixed.

Essential items are needed before the relevant work can proceed. Important items affect what I can conclude; optional items add useful context. If an item is missing, incomplete, unreadable or a different version from one already sent, identify it by its number and explain what you hold. I will tell you what replacement is needed, why it matters and any effect on the agreed work or date.

1. Payment clauses and amendments ESSENTIAL

Why I need it. Every date in the cycle comes from here.

Where you'll find it. The job's commercial folder or the order email normally holds the signed copy.

Without it. There is no cycle to build: no dates, no form and no route can be fixed for a single application.

2. Measure or valuation of work done ESSENTIAL

Why I need it. What is being applied for.

Where you'll find it. Your surveyor's valuation working papers and the site's marked-up drawings or measure sheets.

Without it. There is nothing to value this cycle, so the application itself cannot be built.

3. Variation register IMPORTANT

Why I need it. The largest variable in most applications.

Where you'll find it. The variation register or instruction file, or whatever email trail records what has been instructed and its status.

Without it. No variation is applied for this cycle at all, even where instructed work has been done, until the register arrives.

4. Materials on site records IMPORTANT

Why I need it. Value earned but not built in.

Where you'll find it. Delivery notes from site, and any vesting certificate or insurance schedule your supplier issues for stored materials.

Without it. Materials on site earn nothing in this application, because none of them can meet the contract's conditions without a delivery note and a storage record behind them.

5. The programme OPTIONAL

Why I need it. What supports the measure.

Where you'll find it. The current programme, from the planner or the last progress report, if you hold one.

Without it. The application goes ahead without the programme to lean on for context; nothing else changes.

6. Every previous application and certificate ESSENTIAL

Why I need it. The running position and last cycle's dispute.

Where you'll find it. The job's payment folder and whatever register or email trail holds the variations.

Without it. There is no running position to reconcile against, so this application cannot be checked against what was applied for or certified last time.

7. The application form the contract requires ESSENTIAL

Why I need it. A valid application in the wrong form is not valid.

Where you'll find it. Check the contract's schedules or appendices: if it prescribes a form, that is where it will be. Many subcontracts do not prescribe one, and if yours does not, say so and I use a standard layout.

Without it. The application may be assembled correctly and still fail, because it goes out in the wrong form.

8. The dated records behind the measure IMPORTANT

Why I need it. The review values what was built, and a section valued without a dated record behind it is the first thing a payer abates. Site measures, signed records, photographs, delivery notes and marked-up drawings are what turn a measure into a defensible one.

Where you'll find it. The site team's phones and folders, the site office day book and the supplier invoices file.

Without it. Any section with no dated record behind it is left out of the measure this cycle altogether, whatever work was actually done.

How to send it

Everything to contact@jackbutlerkettle.com. Original files rather than scans of printouts wherever you have them, and forwarded emails rather than text copied out of them, because the dates and the addressees travel with the original and they often turn out to matter.