

What I need from you

Payment Application Assessment & Certification

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. The application in full, with build-up **ESSENTIAL**

Why I need it. What is being assessed.

Where you'll find it. The inbox of whoever the subcontractors apply to.

Without it. There is nothing to assess, so the whole cycle stops before it starts.

2. The subcontract and every amendment **ESSENTIAL**

Why I need it. The rules the assessment must follow.

Where you'll find it. The buying folder or each order's confirmation email.

Without it. There are no rules to assess the application against, so nothing beyond logging that it arrived can be done.

3. Site records for the period **IMPORTANT**

Why I need it. What proves or disproves the measure.

Where you'll find it. The site manager's folder and the team's phones.

Without it. Work with nothing behind it on site is assessed at nil, whatever the application claims, and the lines affected are listed as such.

4. The measure: bills or schedule of rates **IMPORTANT**

Why I need it. The basis for valuing what was done.

Where you'll find it. The priced bills or schedule of rates bound into the subcontract, usually as an appendix; ask whoever placed the order if you cannot find it.

Without it. Measured work is valued as a percentage of the lump sum rather than at contract rates, which is a rougher and more arguable figure.

5. Every previous certificate and notice **ESSENTIAL**

Why I need it. The running position.

Where you'll find it. Your own file of certificates and notices issued on this account, or the payment folder.

Without it. There is no running position to reconcile the assessment against, so the cumulative account cannot be checked.

6. Contra-charges, each with its ground OPTIONAL

Why I need it. A contra-charge without a ground is not one.

Where you'll find it. Whoever manages the account holds the grounds for any contra-charge: the clause relied on and the evidence behind it, if any is being sought this cycle.

Without it. No contra-charge is applied this cycle; the assessment proceeds without one.

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.