



# **Conveyance Management Portal (CMP) User Guide**

*Apply for and purchase a permit  
for a new conveyance installation*

# Introduction

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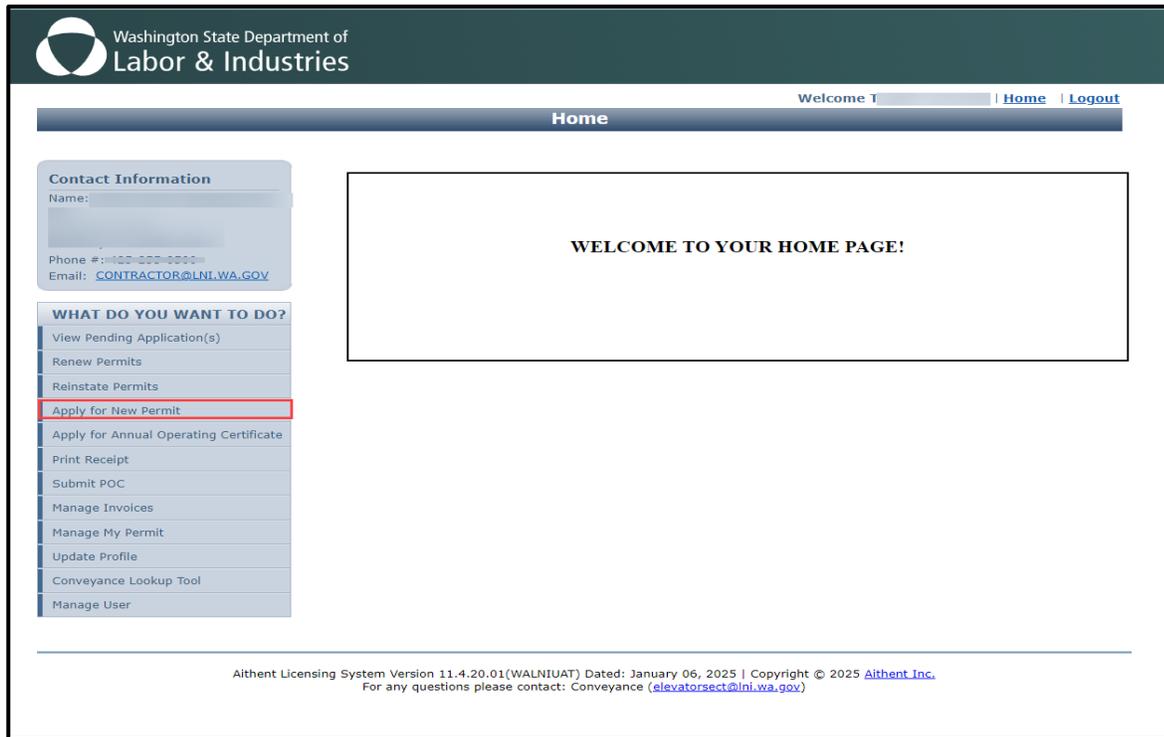
This user guide is for elevator contractors. It covers how to:

- Apply for and purchase a permit.

**Note:** You'll need to first login using your Secure Access Washington (SAW) account. The SAW login can be found at [www.Lni.wa.gov](http://www.Lni.wa.gov). Once you log in, scroll down to the Conveyance Management Portal. This training picks up from the Portal homepage.

# Apply for and purchase a permit for a new conveyance installation

1. Log into the Portal and select **Apply for new permit** from the WHAT DO YOU WANT TO DO? menu at the bottom left.



2. Select **New Conveyance Installation** or Construction Hoist Installation under the **Application Type** banner.
3. Under the **Permit Type** banner, additional choices will appear. If you selected New Conveyance Installation, then these sort into commercial and residential endorsements for a permit. If you selected Construction Hoist Installation, you will choose from a Construction Personnel Hoist or Construction Material Hoist.

**NOTE:** A commercial conveyance is generally for use by the public. A residential conveyance is generally used in a single-family structure.

4. Make selections under the Permit Type header.
5. Select **Next** at the bottom of the screen.
6. A screen will appear that will request specific information, ask specific questions, and require your attestation to complete the permit application under the **New Conveyance Installation** or Construction Hoist Installation banner.

**NOTE:** Any field with an asterisk means the information is required. The Portal will not let you

proceed without including this information.

- 7. Entity information.** This shows the primary point of contact. The information represented is from L&I's Quick Cards database, for the contractor installing the conveyance. The status of the contractor's license in Quick Cards must be active to proceed. Address expired or suspended licenses before continuing. The primary point of contact should be displayed.

**NOTE:** If at any time you see incorrect information that can't be edited in the Portal, it's OK to accept that information is correct. Please email details about the incorrect information, and the corrections needed, to [elevatorsect@Lni.wa.gov](mailto:elevatorsect@Lni.wa.gov).

**NOTE:** On the right hand side of each header, you can use the **Copy From** dropdown to populate information if it is the same as another section of the address screen.

8. Select **Next** at the bottom of the page to continue.

- 9. Address information.** Verify the entity mailing address. Add any information under the Permit Mailing Address, Site Location, and Jobsite Contact Information headers.

**NOTE:** When adding your Site Location, please search first. This helps minimize duplication. Select under the magnifying glass to open the Address Search box. You can search for your site using a full address, partial address, the building name, and more. Select your desired option from the results presented.

**NOTE:** The person applying for a permit is usually different from the onsite contact listed.

10. Select **Next** at the bottom of the page to continue.

- 11. Owner Information.** You must have the UBI number to proceed, except for Residential conveyances. The Portal uses the UBI number as its primary identifier.

Select **Add** and use the **Owner Search** feature to find an owner whose UBI is already in the system. If the owner is new, you can select **No**, and add the UBI number and other owner information on the next screen.

**NOTE:** If you enter a UBI number for an account that already exists, a popup will appear that allows you to link the UBI number to its existing owner information. Select **OK** in the popup if you wish to populate the screen with existing owner information.

If the existing owner information does not look correct, check the UBI number and correct it if necessary. If the information needs to be corrected, building owners and property managers can update their information using the "Manage User or "Update Profile" option on the Portal homepage.

Contractors can search the [Department of Revenue's business lookup tool](#) or email L&I's Elevator Program at [ElevatorSect@Lni.wa.gov](mailto:ElevatorSect@Lni.wa.gov), for help finding the right owner or updating owner information.

12. Review the rest of the information for accuracy. Select **Save**.

13. The owner information you selected will be displayed. Select **Next**.

**NOTE:** If the owner information is not correct, select **Delete** to start the process over. Delete removes the association of this owner to the application, it will not delete the owner in the system.

14. **Additional Information.** Under the **Mandatory Required Documents** header, upload the conveyance plan and a copy of the contract value and scope of work.

**NOTE:** Construction Material and Personnel Hoists do not require documents to be uploaded.

15. Select the **Documents Link** from the documents column at the far right. When the **Document Upload** screen appears, follow the instructions to choose, attach, and upload documents. You will get an error message if you have not uploaded a document for each line.

16. Next, enter information under the **Conveyance Information** header just below the **Mandatory Required Document(s)** header. You are encouraged to enter all information.

**NOTE:** The Conveyance Designation field refers to where the conveyance is in the building. For example, the "West Corner," or "Tower 2."

**NOTE:** The Rise in Feet field must include both feet and inches measurement. This includes even if the number of inches is zero (0).

17. Add the total conveyance contract value under the **Additional Information** header. Your contract value determines the cost of the permit. Please be sure it is accurate and includes both time and materials.

18. Select **Next**.

19. **Questions.** Answer each question displayed for your application.

20. Select **Next**.

21. **Attestation.** On the "Attestation" screen, review the attestation verbiage. Then select the attestation checkbox acknowledge your agreement.

22. Select **Submit Application** located at the bottom of the screen.

23. The **Fee Details** screen appears next. It provides several options. You can:

- A. Edit Application – allows you to review the details on the previous screens.
- B. Pay Now – takes you to a secure vendor portal.
- C. Submit and Pay Later – creates an invoice that can be paid later.
- D. Preview – generates a printable PDF that displays the information from the previous

screens.

**24.** Once you input your payment information on our secure vendor portal, you'll see a confirmation your transaction is successfully completed. If you select 'Submit and Pay Later,' you will be taken directly to the confirmation screen. The unpaid invoice for your application will be viewable from the Manage Invoice screen from the Home page.

**NOTE:** Save your online transaction number to help you track the status of your application. The transaction number is listed on your payment receipt, on the very bottom of each page of the application summary, and under the **Confirmation** header.

**25.** Once your payment is received, your application will be reviewed and processed by the Elevator Program.

**26.** We will verify you've included all necessary information, and your project meets code. Then notify you of our decision.

Questions or comments, email: [CMPTraining@Lni.wa.gov](mailto:CMPTraining@Lni.wa.gov), and reference the training title in the subject line.