

ViewPoint Utility Eligibility Review User Guide

Technology Services

This guide is here to help you with the QA/QC process in ViewPoint. It provides an overview of key features along with step-by-step instructions to improve your experience and efficiency.

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1. Introduction

Welcome to UTIL Role

ViewPoint Utility Eligibility Review user guide streamlines eligibility reviews, helping you stay organized and connected with your Willdan Program Team.

2. Logging In

To access ViewPoint UTIL Role, you must first have access to ViewPoint with a UTIL account. If you already have one, proceed to Step 2.2. If you do not have an account, please contact your Willdan Program Team representative for assistance.

2.1 - Confirming Your Willdan-assigned Login

You can verify that your login works by visiting: <https://ladwp-landing.viewpointwilldan.com>.

2.2 - Accessing ViewPoint

After successfully verifying that your login works, proceed with the following steps:

1. Open your preferred browser.
2. Go to: <https://ladwp-landing.viewpointwilldan.com>
3. Log in using your Willdan-issued credentials:

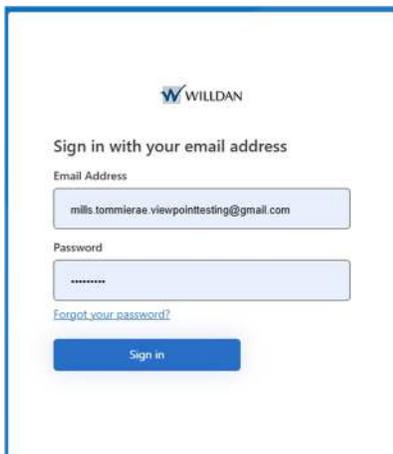


Figure 1 – ViewPoint Willdan Sign In

Complete your login process by following any additional prompts, such as Two-Factor Authentication.

3. Default Workspace

Upon logging in, you'll see the default **Workspace** view. The workspace is divided into five sections; Eligibility, Leads, Audits, Work Orders and QAQC. Each status is broken down by status details relative to the status section. For this guide we will focus on the Eligibility section.



Figure 2 – Eligibility Workspace

Additionally, upon logging in, you will receive a pop-up notification reminding you of the number of pending eligibility requests.

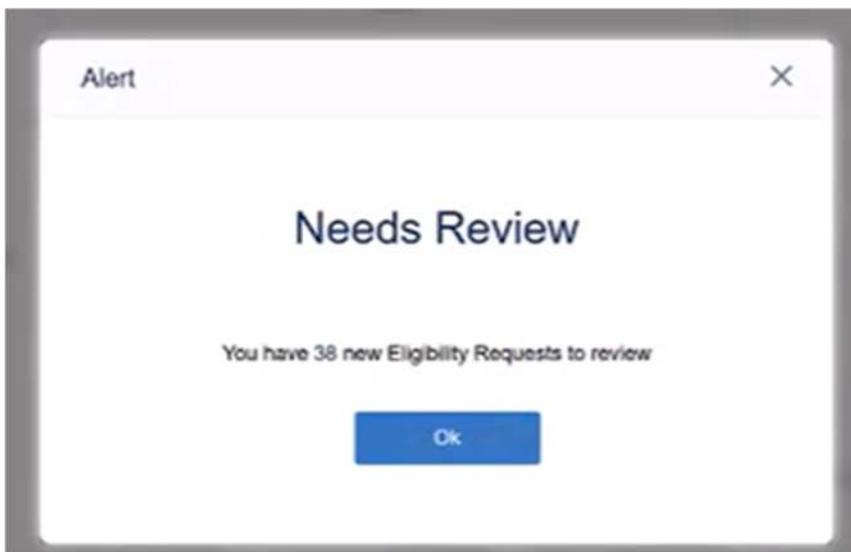


Figure 3 – Eligibility Workspace – Pop-Up Notification

3.1 – Returning to Eligibility Workspace

You can return to the Eligibility workspace anytime by clicking on the House then Workspace.

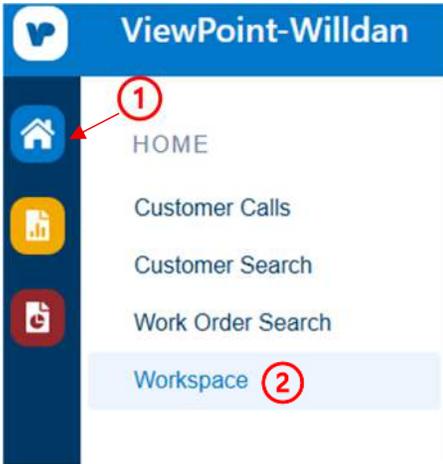


Figure 4 – Returning to Eligibility Workspace

3.2 – Eligibility Workspace States

Use the category tabs to filter for all customer with state of “Under Utility Review”. When you select a category and perform a search, only items from that category will appear.



Figure 5 – Eligibility States – Under Utility Review, Need CSR Review

3.2.1 – Under Utility Review

This section includes all customers needing utility eligibility approval.

3.2.2 – Need CSR Review

This section will notify the Willdan Program team that the customer requires an additional review.

3.3 – Filtering

All jobs may be filtered in the header row of each Eligibility – Under Utility Review State. To show or hide information in the Application List view, click the three lines and check or uncheck the boxes under the filters. Example below shows filtering by Initial Utility Review Complete.

Eligibility Status	Under Utility Review Date	Account Number	Customer Name	Address	City	Zip	Max Meter kW	Number Of Meters	Initial Utility Review Complete	Utility Eligibility Notes
Under Utility Review	08/12/2025	103801080	ATHEX COMPANY	10311 WASHINGTON BLVD	LOS ANGELES CA	90001	10.00	1	No	
Under Utility Review	08/08/2025	103801080	PECO WATER HOLDING CORP	1001 WENDE BLVD	LOS ANGELES CA	90015	0	1	No	
Under Utility Review		103801080	CITY LA GENERAL SERVICES DEPT - POLICE	3000 W 6TH ST	LOS ANGELES CA	90005	30.0	1	Yes	

Figure 6 Eligibility – Under Utility Review – Filter View

Available viewing filters:

- **Eligibility Status** – all customers that have a status of under utility review.
- **Under Utility Review Date** – Allows filtering by Under Utility Review Date a.k.a. the date the signed Customer Assessment and Audit Authorization (CAAA) was uploaded.
- **Account Number** – Allows filtering by account number.
- **Customer Name** – Allows filtering by end customer account name.
- **Address** – Allows filtering results to show the service address of the end-customer.
- **City** – Allows filtering results by City
- **Zip** – Allows filtering results by Zip
- **Max Meter kW** – Allows filtering by Max Meter KW
- **Number of Meters** – Allows filtering by quantity of meters
- **Initial Utility Review Complete** – Allows filtering whether the initial utility review is complete
- **Utility Eligibility Notes** – Allows by any notes that have been added by the Utility team.

Note: Customizing your view is as easy click and hold then drag and drop the column headers into your preferred layout.

4. Verifying Eligibility

This section outlines the eligibility verification process and provides clear, step-by-step instructions to guide you through each stage.

4.1 – Initial Review

To begin, select the customer to be reviewed and click the ellipsis on the right-hand side. Click "View".

Eligibility Status	Under Utility Review Date	Account Number	Customer Name	Address	City	Zip	Max Meter kW	Number Of Meters	Initial Utility Review Complete	Utility Eligibility Notes	
Under Utility Review	08/01/2025	100001000	ATHEX CONSULTING	10017 WASHINGTON BLVD	LITTLE ROCK, AR	72204	10.00	1	No		
Under Utility Review	08/02/2025	100001000	PROF. JAMES W. GUNDEL GROUP	10017 WASHINGTON BLVD	LITTLE ROCK, AR	72204	0	1	No	Not	
Under Utility Review	08/01/2025	100001000	CITY OF GERRARD SERVICES DEPT - POLICE	2000 N GERRARD ST	LITTLE ROCK, AR	72204	50.0	1	Yes	This is a test note	

Figure 7 – Verifying Eligibility – View Customer

The default view is the Account Tab. The Account tab has the customer information ready to be verified. Once you've reviewed and verified the information, navigate to the **Action** tab on the left-hand side. Click on "Initial Utility Review – Complete, enter any pertinent notes, and click Save.

Figure 7 – Verifying Eligibility – Default View/Initial Utility Review – Complete

4.2 – Viewing Signed CAAA

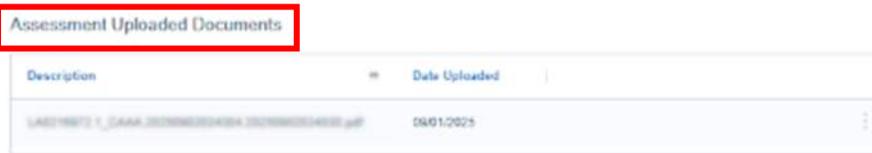
To view the signed Customer Assessment and Audit Authorization (CAAA) form:

1. Navigate to the **Assessment** tab.



Figure 8 – Viewing Signed CAAA – Assessments Tab

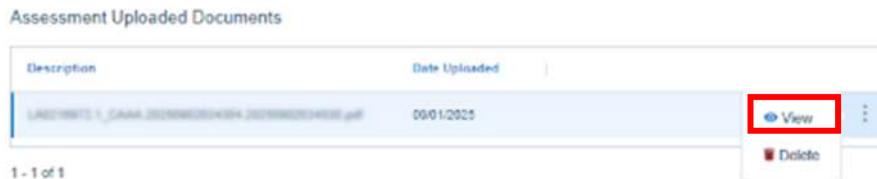
2. Scroll down to the **Assessment Uploaded Documents** section.



1 - 1 of 1

Figure 9 – Viewing Signed CAAA – Assessment Uploaded Documents

3. Locate the signed CAAA form, click the **ellipsis** (···) on the right, and select **View**.



1 - 1 of 1

Figure 10 – Viewing Signed CAAA – Viewing document

4. The signed CAAA will appear in pop-up window.

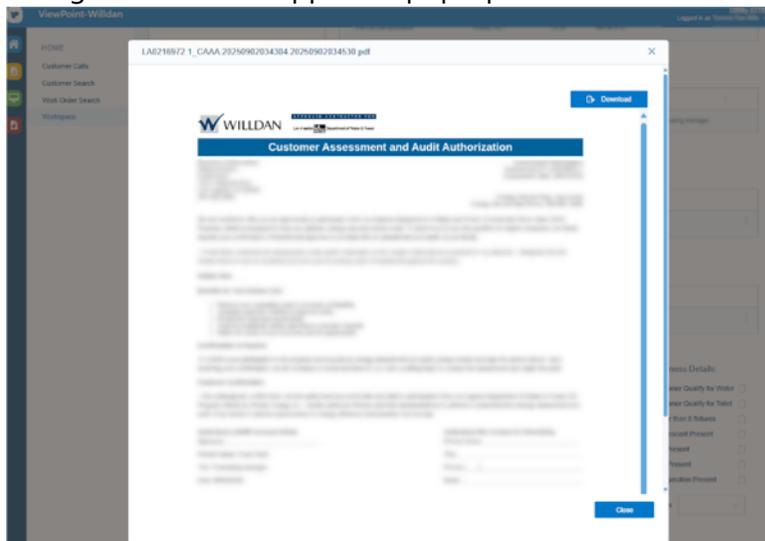


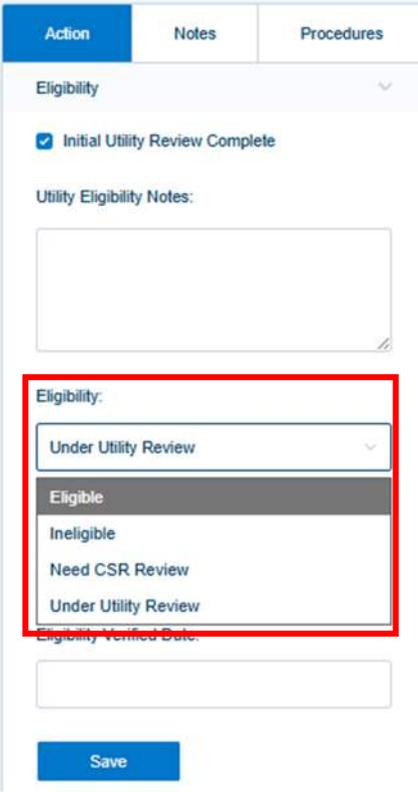
Figure 11 – Viewing Signed CAAA – Pop-Up window for document viewing

4.3 – Noting Eligibility

The final step in verification is updating the eligibility status. There are four eligibility states: Eligible, Ineligible, Need CSR Review, and Under Utility Review.

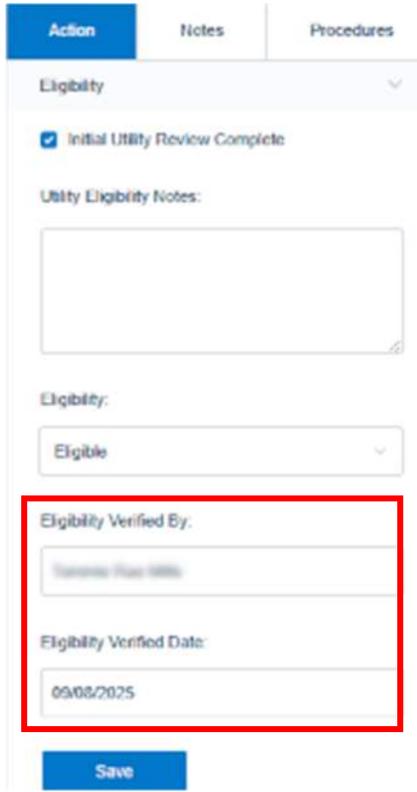
Please note that the default eligibility status is "Under Utility Review." To update it, click the drop-down menu, select the appropriate status, and then click **Save**.

When you click Save, ViewPoint will automatically populate the Eligibility Verified By and Eligibility Verified Date fields.



The screenshot shows a form with three tabs: 'Action', 'Notes', and 'Procedures'. The 'Eligibility' dropdown is expanded, showing a list of options: 'Under Utility Review' (current selection), 'Eligible' (highlighted), 'Ineligible', 'Need CSR Review', and 'Under Utility Review'. Other visible fields include 'Initial Utility Review Complete' (checked), 'Utility Eligibility Notes' (text area), and 'Eligibility Verified Date' (text field). A 'Save' button is at the bottom.

Figure 12 – Noting Eligibility – Updating Eligibility Status



The screenshot shows the same form as Figure 12, but with the 'Eligibility' dropdown set to 'Eligible'. The 'Eligibility Verified By' field is populated with 'Thomas P. Smith' and the 'Eligibility Verified Date' field is populated with '09/08/2025'. Both the dropdown and the auto-populated fields are highlighted with a red box. A 'Save' button is at the bottom.

Figure 13 – Noting Eligibility – Auto Populated Fields

5. Conclusion

Our goal is to enhance your experience and streamline your workflow.

To contact Willdan support regarding the UTIL Eligibility Review User Guide, send an email to:

WES-Technology-Operations@willdan.com

Willdan Group, Inc.

800 West 6th Street, Suite 940, Los Angeles, CA 90017