

# CUSTOMER ASSESSMENT AND AUDIT AUTHORIZATION (CAAA) e-SIGN

## Release Notes

6/23/2026

## How to Collect Initials and Signatures on the CAAA Using the new e-Sign Feature in ViewPoint

**Step 1:** Begin the assessment at a customer site and fill out the Assessment Information Page in the following order:

1.) Customer Site Section – Includes the following fields: DBA (if applicable), Billing Address (if applicable) Phone Number, Building Sq. Ft., Year Built, Business Type DDL, NAICS Industry Title DDL, Building Type DDL

| Assessment Information                                                                             | Audits | Work Orders                                                                                        | Warranty |
|----------------------------------------------------------------------------------------------------|--------|----------------------------------------------------------------------------------------------------|----------|
| <p>* Business Name: <input type="text"/></p>                                                       |        |                                                                                                    |          |
| <p>* Site Address: <input type="text"/></p>                                                        |        | <p>DBA Name: <input type="text"/></p>                                                              |          |
| <p>Address 2: <input type="text"/></p>                                                             |        | <p>* Billing Address (if different from site address): <input type="text"/></p>                    |          |
| <p>* City: <input type="text"/> * State: <input type="text"/> * Zip Code: <input type="text"/></p> |        | <p>Address 2: <input type="text"/></p>                                                             |          |
| <p>* Phone Number: <input type="text"/></p>                                                        |        | <p>* City: <input type="text"/> * State: <input type="text"/> * Zip Code: <input type="text"/></p> |          |
| <p>* Business Type: <input type="text"/></p>                                                       |        | <p>* Building Sq Ft: <input type="text"/> * Year Built: <input type="text"/></p>                   |          |
| <p>is DAC <input type="text"/></p>                                                                 |        | <p>* NAICS Industry Title: <input type="text"/></p>                                                |          |
| <p>Customer Group 1 <input type="text"/></p>                                                       |        | <p>DAC Category <input type="text"/></p>                                                           |          |
| <p>* Building Type: <input type="text"/></p>                                                       |        | <p>Customer Group 2 <input type="text"/> Customer Group 3 <input type="text"/></p>                 |          |

## 2.) Left-side Assessment and Qualify Assessment Panels

Assessment

\* Prospect Status:

06/08/2026

Lead

\* Prospect Status Reason:

Moving to Assessment

\* Prospect Source:

ESR Walk-In

\* Measure Type:

Bundle

Qualify Assessment

Verify Meters and Account:

Correct

\* Qualification Status:

Qualified

\* Auditor Type:

Contractor Audit

## 3.) Contact Person – Add as many as necessary and make sure to designate a Decision Maker

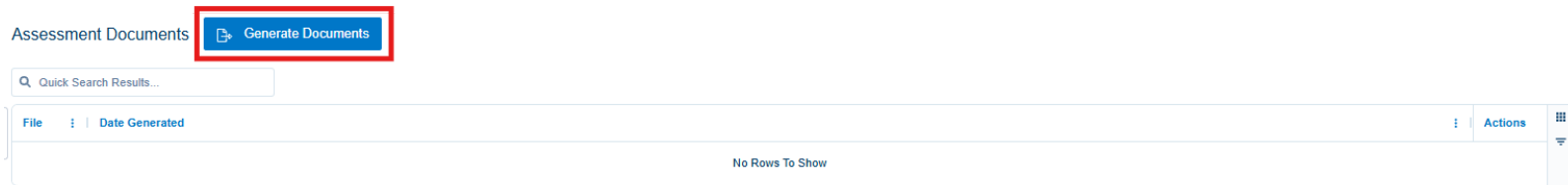
Contact Person 

 Quick Search Results...

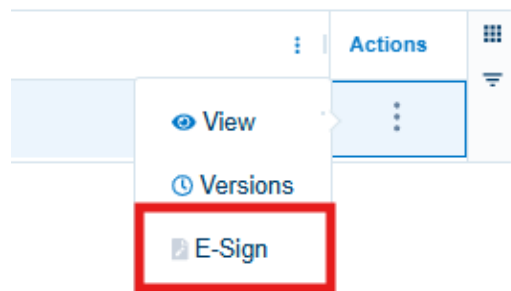
| Decision Maker | First Name | Last Name | Phone Number   | Email         | Title                     |
|----------------|------------|-----------|----------------|---------------|---------------------------|
| No             | John       | Smith     | (323) 555-5555 | john@test.com | Business Manager          |
| Yes            | Jane       | Smith     | (818) 777-7777 | jane@test.com | Building & Business Owner |

**Step 2:** Navigate to the “Assessment Documents” section and click on the

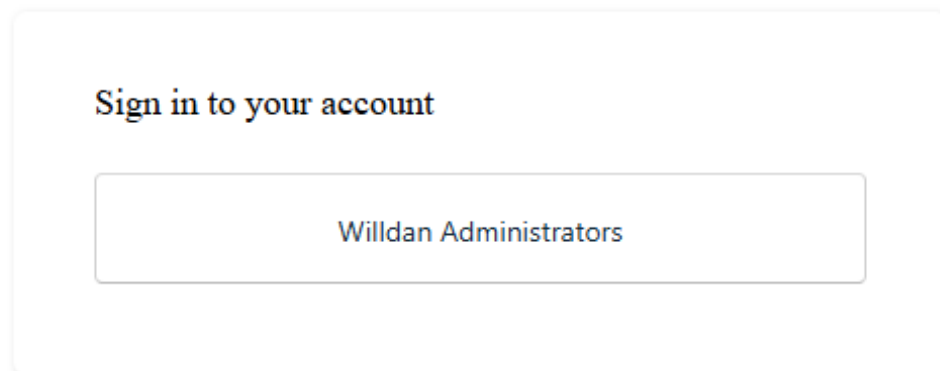
“Generate Documents” button to generate the CAAA



**Step 3:** Once the CAAA has been generated, expand the ellipsis menu, and click on the “e-Sign” option. Clicking on “e-Sign” will open the CAAA form in another window.



Note: You may be prompted to login using your Okta credentials:

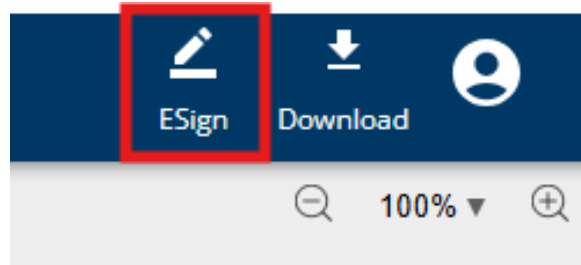


**Step 4:** Upon viewing the CAAA, verify that the information in the Business Information section (Customer Business Name, Decision Maker Name, Customer Site Address, Decision Maker Phone Number, and Decision Maker Email) and Authorized Signer section (Decision Maker Name and Title) are correct.

**If any of this information is incorrect:**

- Return to the “Assessment Information” page
- Correct the information
- Regenerate the CAAA

**Step 5:** Click on the “e-Sign” button at the top right of the screen



**Step 6:** Fill out the required “Sender Email,” “Signer Email,” and “Signer First Name” fields. Please note: “Sender” refers to the ESR and “Signer” refers to the decision maker

### eSignature Options

Sender Email \*

Signer Email \*

Signer First Name \*

Send Email

Sign Now

Enter an optional personal email message and click send.

Email Message

SEND

**Step 7: Complete this step if the decision maker is ready to sign the CAAA at the time of the assessment. If they are not ready, skip ahead to Step 10.**

- Click on the “Sign Now” tab
- Click on the “Open” button to generate the e-Signature link

Send Email

Sign Now

Click open below to start the esign process on this device.

OPEN

Once the e-Signature link has been generated, click to proceed to the Sertifi page



Then click on the “Review and Sign” button

**Sender**

LADWP CDI  
entino@willdan.com

06/25/2026 01:14 PM PDT  
Welcome to our eSign Room. Please review and sign the attached documents. If you have any questions, feel free to post them below.

Post any questions/comments

Post

**Signature Documents**

CAAA  
Created on 06/25/2026 01:14 PM PDT

Review and Sign

Participants

**Step 8:** When viewing the e-Sign version of the document, click on the “Get Started” button at the top of the page to be guided through the fields where initials or signatures are required.

Please complete and sign in 5 locations.

[Get Started](#)

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Los Angeles  Department of Water & Power

Customer Assessment and Audit Authorization

The “Get Started” button will turn into a “Next” button that will guide users from one required field to the next. Users are also free to click on the fields without using the “Next” button. With e-Sign, initials and signatures are typed in using the device’s keyboard.

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Please complete and sign in 5 locations.

[Next >](#)

Please Note: These checkboxes used to describe the decision maker’s role at the site are not included within the e-Sign feature because they are not required. Make sure the customer fills this section out.

**Please check the box beside the applicable description (check multiple boxes if they apply)**

- ☐ I am the owner of the facility.
- ☐ I am the property manager of the facility.
- ☐ I am the tenant of the facility.
- ☐ I am the utility account holder of the facility.
- ☐ Other:

**Step 9:** Once all the required fields have been filled out, click on the “Finish & Submit Electronically” button that appears at the top of the screen. A signed copy of the CAAA will be emailed to the customer and the ESR.

I am applying an e-signature in my name to this document and have read the [Consumer Disclosure](#)

Finish & Submit Electronically

Additionally, if the ESR returns to ViewPoint and refreshes the assessment page, they will find that the signed CAAA has been automatically uploaded to the “Assessment Uploaded Documents” section.

Assessment Uploaded Documents [Upload Form](#)

| Description                              | Date Uploaded |
|------------------------------------------|---------------|
| LA0206081_CAAA-signed.20260623234229.pdf | 06/23/2026    |

**Step 10: Complete this step if the decision maker is NOT ready to sign the CAAA.**

- Click on the “Send Email” tab
- Enter a brief message
- Click on the “Send” button to email the customer a copy of the document

[Send Email](#) [Sign Now](#)

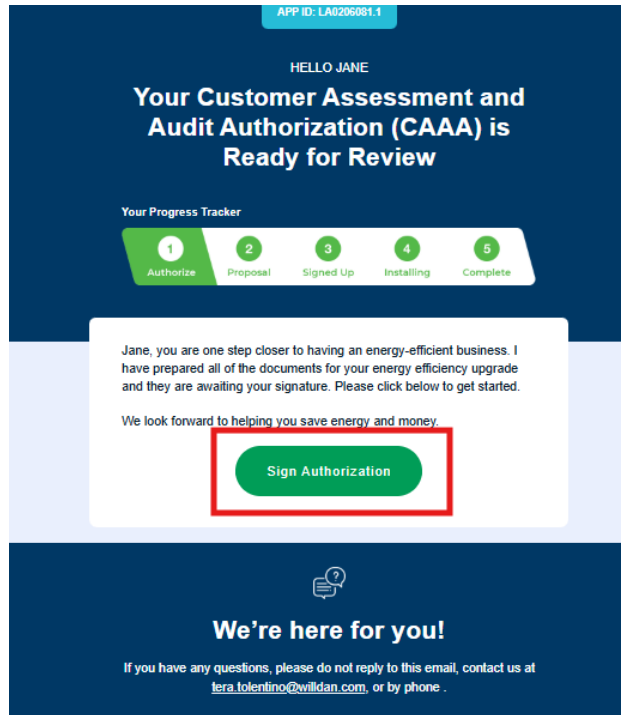
Enter an optional personal email message and click send.

Email Message

Attached please find a copy of the CAAA to review.

[SEND](#)

The email sent to the customer contains a link that will allow them to review and e-Sign the CAAA



If the CAAA has been sent to a customer and the document needs to be retracted:

- The ESR or CSR can pull up the document
- Click on the “e-Sign” button
- Select “Advanced” at the bottom of the “eSignature Options” modal

eSignature Options

The Proposal has already been sent to the customer for eSignature  
[Click here to open CAAA for signing](#)

Send Email

Enter an updated email message to send to [tera.vptraining@gmail.com](mailto:tera.vptraining@gmail.com)

Email Message

☐ Update Email Address

[Advanced](#)

RESEND

After clicking on “Advanced” users will have the option to remove access to the

current version of the document by disabling links

Completely remove from eSign

Links in previous emails will no longer work.

Documents will still exist in Closer.

REMOVE