POLL PAD | training guide

Dutchess County Board of Elections

knowINK
Innovative Election Solutions

POLL PAD®

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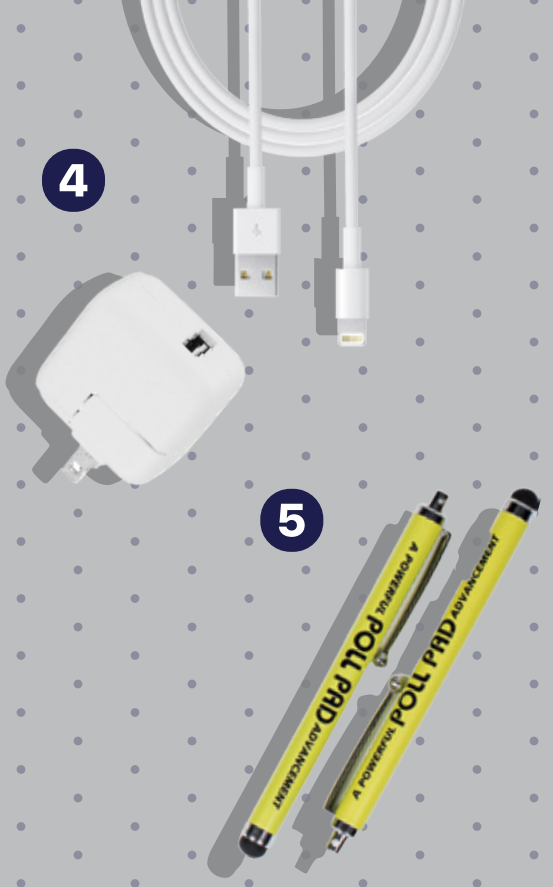
meet the

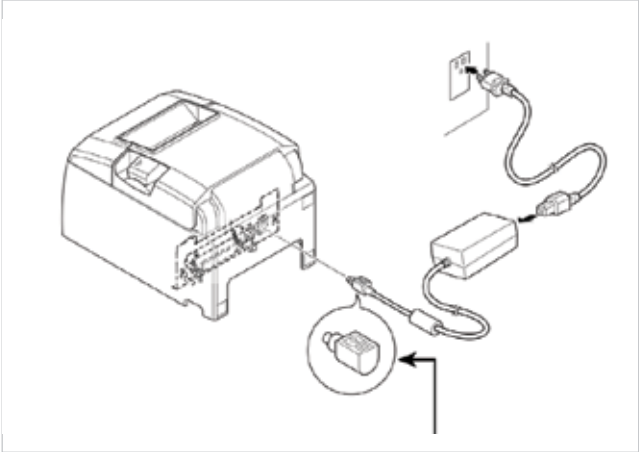
POLL PAD®

1. Power Button
2. Home Button
3. Poll Pad & Plastic Shell
4. Stand Arm
5. Poll Pad Base
6. Camera
7. ID Tray



1. Green Case
2. Poll Pad
3. Poll Pad Base
   (stand arm located under base)
4. Lightning to USB Cable & USB Power Adapter
5. (2) Stylus
6. ID Tray
7. Printer & Cords
8. Screen Cloth

OPENING PROCEDURES



1 LOCATE PRINTER

Open the transport case and remove printer, adapter and power cord.

2 CONNECT TO POWER ADAPTER

Connect the power cord to the power adapter.
NOTE: Ensure secure connection

3 CONNECT TO PRINTER

Plug the connector into the back of the printer.
NOTE: Ensure secure connection

4 PLUG PRINTER INTO OUTLET

Plug printer into a power source.

NOTE: Make sure your check-in table is close to the wall outlet or you have an extension cord or power strip available.

5 TURN PRINTER ON

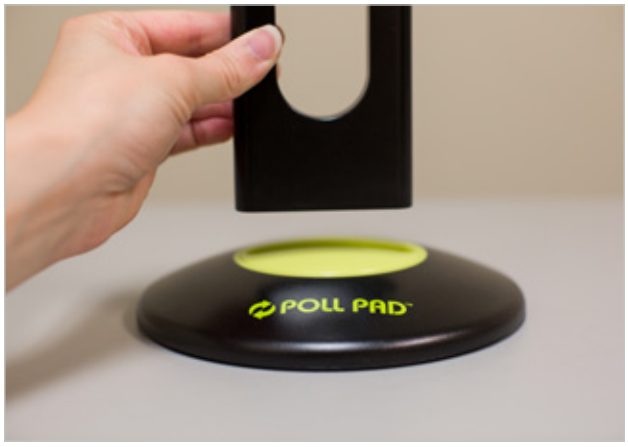
The ON/OFF switch is located on the left side of the printer. If you do not see a green power light on the front panel, check the power cord connections and make sure the outlet has power.

NOTE: If you see a red error light refer to page 30.

6 STAND ARM

To attach the stand arm to the Poll Pad shell, press the buttons on the side of the arm and place in circular opening. Release buttons and rotate the arm until you hear a click.

NOTE: Sticker with jurisdiction name and number will be on top.



7 CONNECT ARM TO BASE

Take stand arm and place into Poll Pad base. Once attached rotate Poll Pad making sure the camera is on top, oriented in a landscape position.

NOTE: Sticker with jurisdiction name and number will be on top.

8 ATTACH PHOTO ID TRAY

Attach the ID tray to the Poll Pad using the mounting clip. Once attached, insert stylus into the holding slot. Adjust the Poll Pad to a suitable angle.

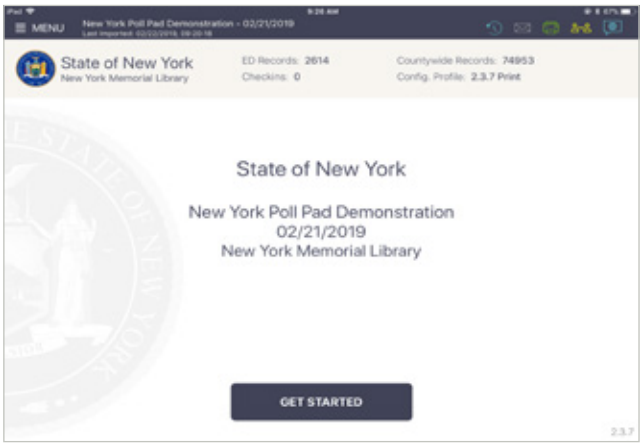
9 CONNECT POLL PAD TO POWER

Plug the lightning connector into the Poll Pad, then plug the power adapter into a power source.

10 POWER ON POLL PAD

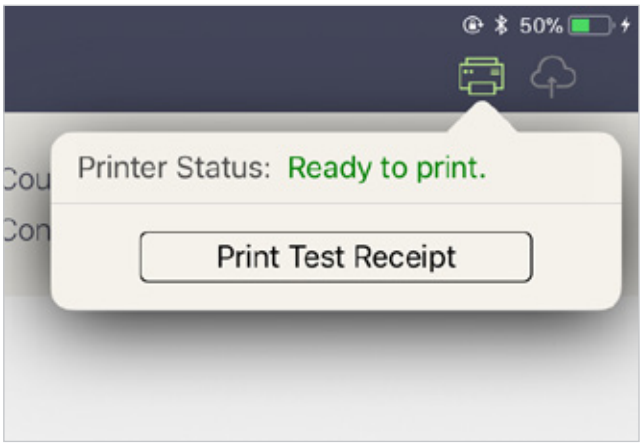
Press the power button on the top left edge of the unit until you see the Apple icon, then release. The Poll Pad will power on, and the Poll Pad application with launch automatically.

NOTE: Poll Pad will power on if connected to AC power



11 HOME SCREEN CHECKLIST

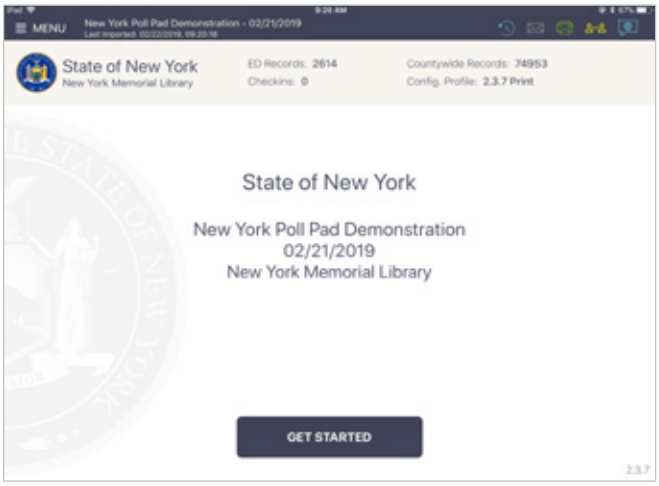
- Name of Jurisdiction
- Election Name and Date
- Polling Place Location is Correct (Most Important)
- Check-in Count = 0
- Battery Life is Close to Full (90% or greater)



12 CONNECT & TEST PRINT

A green printer icon on the Poll Pad means you are connected to the printer.

Press the green printer icon and select 'Print Test Receipt' and a sample receipt will print. You are now ready to sign in and process voters.

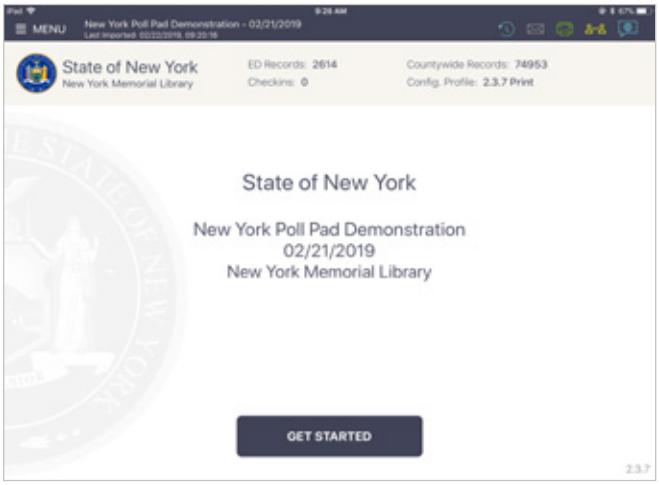


PRINTER ICONS & COLORS

Poll Pad is paired with the printer. A receipt will print out for checked-in voters and those who are in the wrong precinct.

Poll Pad recognizes the printer and is currently in the process of pairing with the device.

Poll Pad is not paired with the printer. Confirm printer is turned on. Select the printer icon, followed by Pair and Connect.



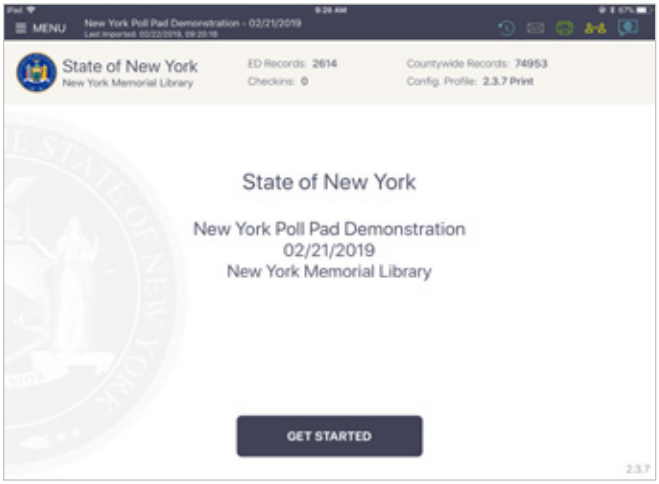
MULTI-PEER ICONS & COLORS

Poll Pad is currently connected and synchronizing with the other poll site Poll Pads.

The number inside of the blue circle indicates the number of poll site units the Poll Pad is connected to.

Poll Pad recognizes the presence of other poll site Poll Pads but is not connected or synchronizing with these units.

The Poll Pad is currently disconnected and not synchronizing with the other poll site Poll Pads. CONTINUE TO PROCESS VOTERS. Contact the Coordinator.



CLOUD SYNC ICONS & COLORS

Poll Pad is currently connected and synchronizing with the central election database.

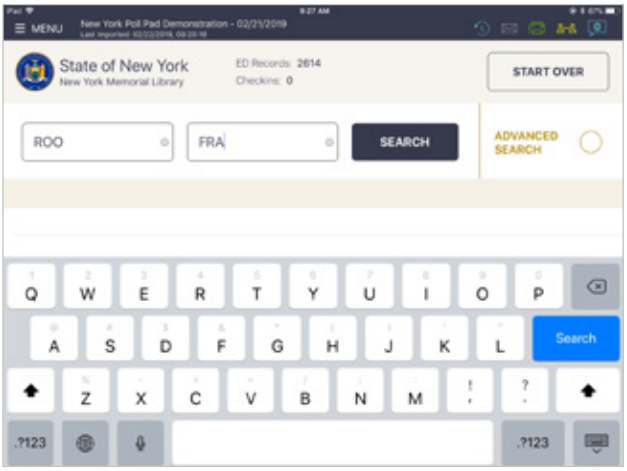
Poll Pad is in the process of connecting to the central election database.

The Poll Pad is currently disconnected and not synchronizing with the other poll site Poll Pads. CONTINUE TO PROCESS VOTERS. Contact the Coordinator.

PROCESSING VOTERS

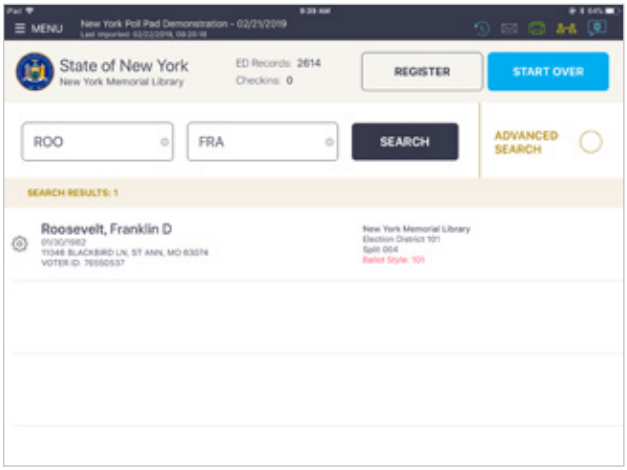
1 SEARCH BY NAME

Press **Manual Entry** to locate the voter by using his or her first and last name.



2 ENTER VOTER'S NAME

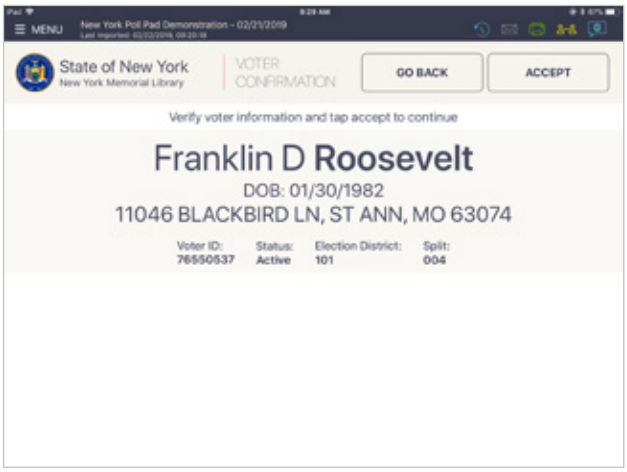
Use the on-screen keyboard to enter the first three (3) letters of the voters last and first name, then press **SEARCH**.



3 SELECT VOTER'S RECORD

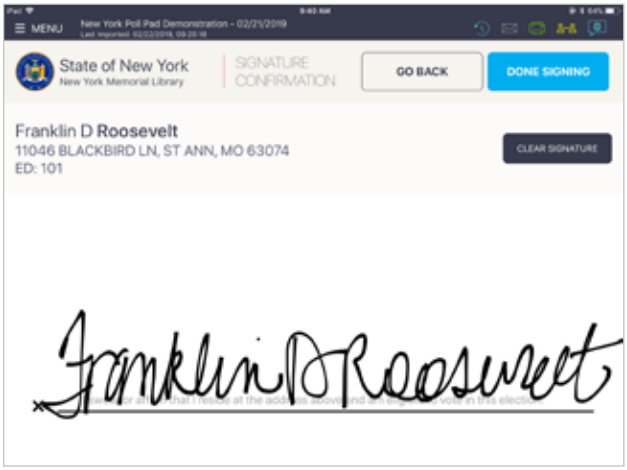
Records matching the search criteria display on screen. Locate the voter's record and verify it does not contain any exceptions, then select the voter by touching his or her record.

NOTE: Search results show both in-district and out of district voters. Out of district voters display in gray with an indicator that reads "Wrong Location."



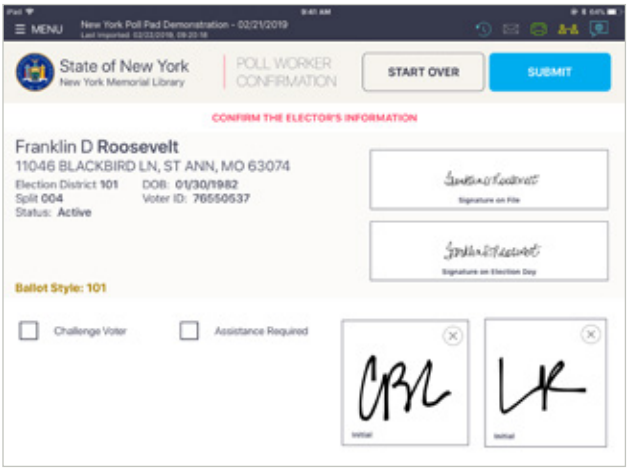
4 VOTER CONFIRMATION

Screen displays voter's information.
Verify information, if all is correct press **ACCEPT**.



5 VOTER SIGNATURE

Rotate the Poll Pad to the voter to complete their oath and capture signature. Once complete, rotate back and press **DONE SIGNING**.

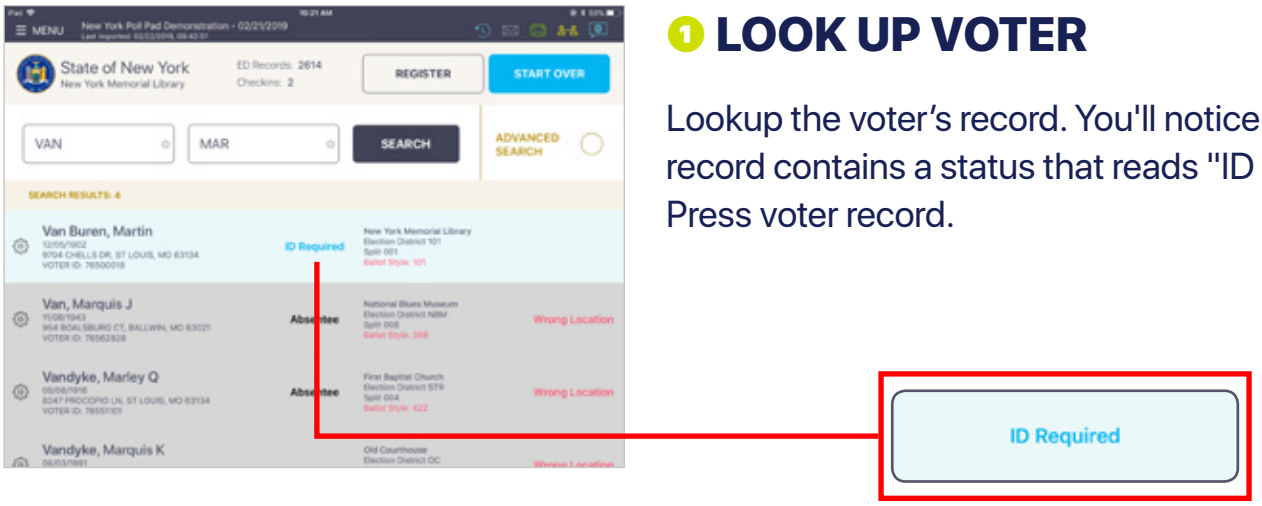


6 POLL WORKER CONFIRMATION

Poll worker confirmation screen will appear.
Poll worker to verify signature and confirm all information is correct. If correct, initial and press **SUBMIT**.

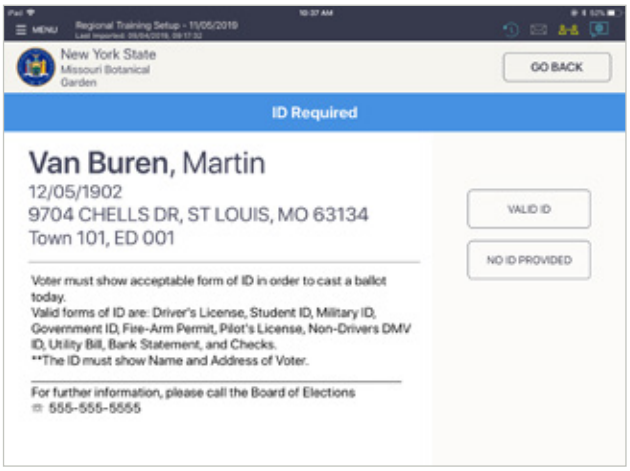
7 PROCESSED VOTER

Good Job! You successfully processed the voter. Give the voter their receipt and ballot, then direct them to the privacy booth.



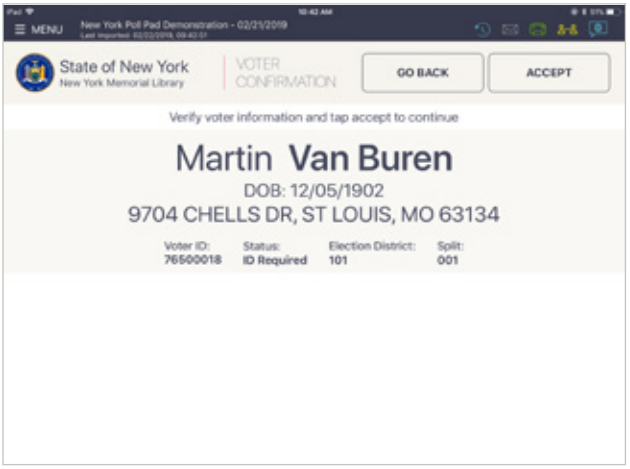
1 LOOK UP VOTER

Lookup the voter's record. You'll notice their record contains a status that reads "ID Required." Press voter record.



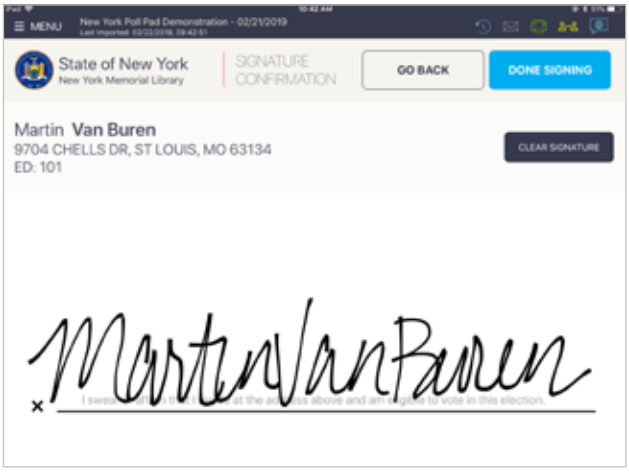
2 FOLLOW PROMPT

A prompt will appear, follow written instructions. If the voter has a valid form of identification, press **Valid ID**.



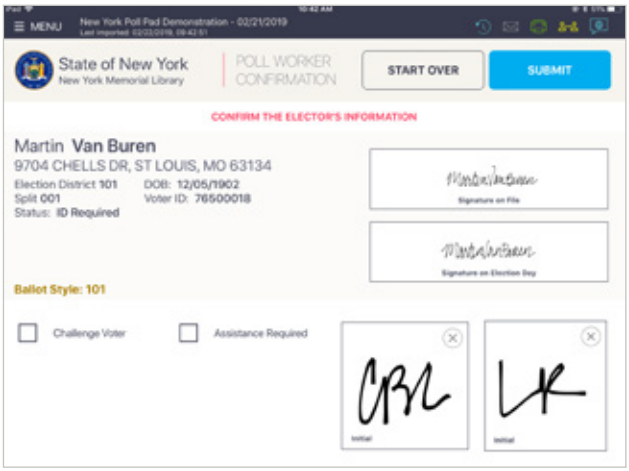
3 VOTER CONFIRMATION

Screen displays voter's information. Verify information, if all is correct press **ACCEPT**.



4 VOTER SIGNATURE

Rotate screen to capture voter signature. Once complete, rotate back and press **DONE SIGNING**.



5 POLL WORKER CONFIRMATION

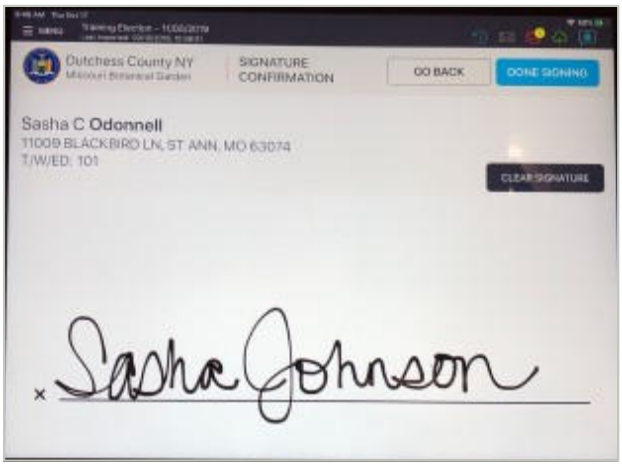
Poll worker confirmation screen will appear. Poll worker to verify signature and confirm all information is correct. If correct, initial in provided field then press **SUBMIT**.

6 PROCESSED VOTER

Good Job! You successfully processed the voter. Follow polling place protocol to direct voter to next polling station.

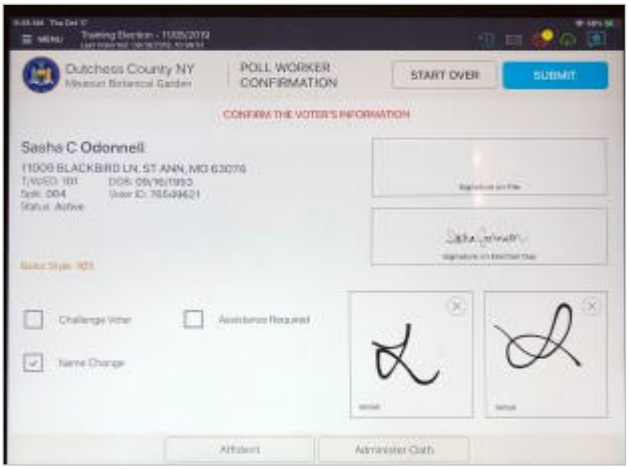
1 LOOK UP VOTER

Lookup the voter's record using either Scan Barcode or Manual Entry instructions. You may have to use the advanced search feature.



2 HAVE VOTER SIGN THEIR NEW NAME

The voter should only be signing their **NEW NAME** in the poll pad.

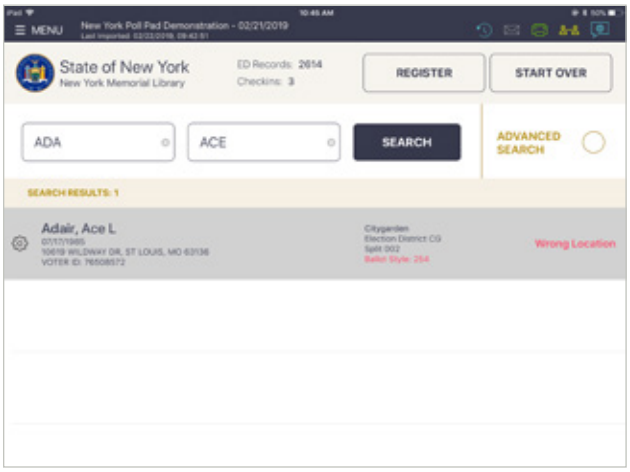


3 POLL WORKER CONFRIMATION

Poll worker confirmation screen will appear. Check the **NAME CHANGE** box to the left of the initial boxes and record the change in the Record's Binder. Proceed with checking in the voter by initialing and tapping **SUBMIT.**

1 LOOKUP VOTER

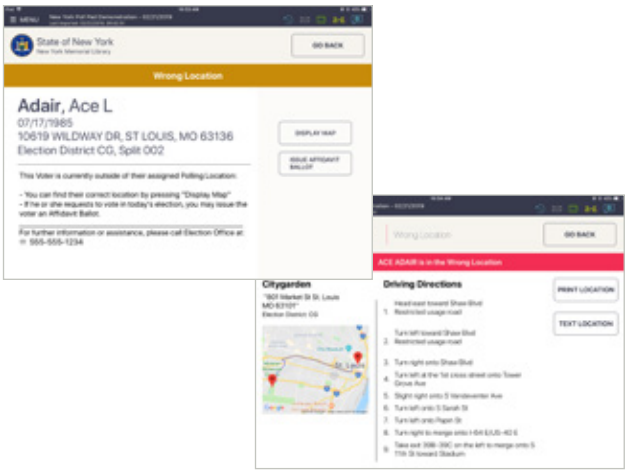
Lookup the voter's record using either Scan Barcode or Manual Entry instructions.



2 LOCATE VOTER'S RECORD

If the voter is at the wrong polling location, their record will be highlighted in gray and contain a status that reads "Wrong Location." Touch voter record.

Wrong Location



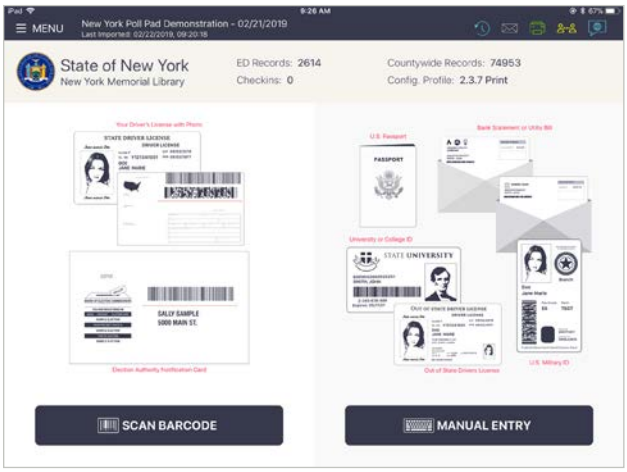
3 FOLLOW PROMPT

A popup will appear, follow written instructions.

4 PROVIDE DIRECTIONS

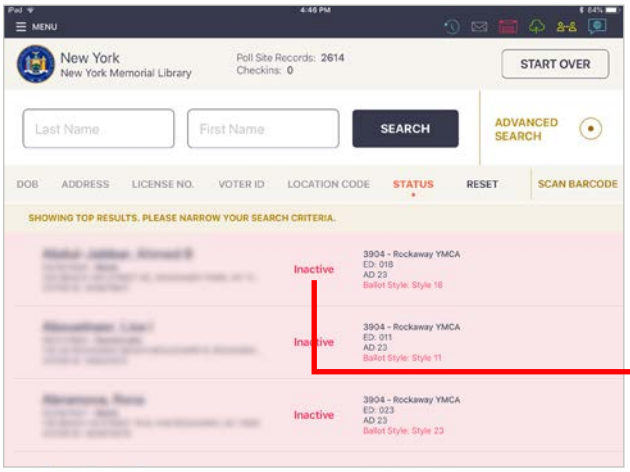
A popup will appear reading, "(Voter's Name) is in the Wrong Location." Correct polling location name and address will be provided. Direct voter to correct polling location by Text or Print. Press **GO BACK** then **START OVER.**

NOTE: Mapping and Text features are only available if using connectivity in polling location.



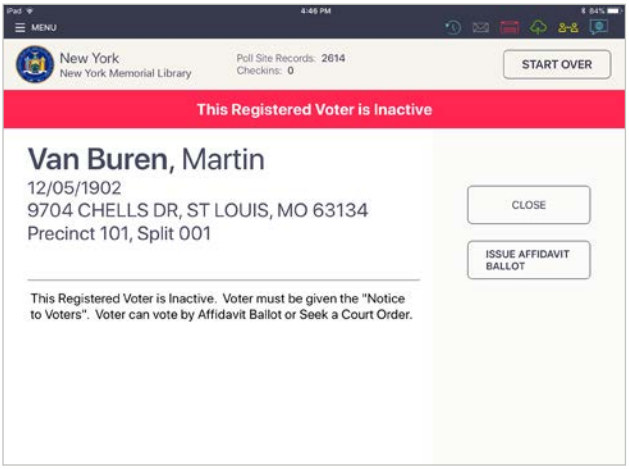
1 LOOK UP VOTER

Lookup the voter's record using either Scan Barcode or Manual Entry instructions.



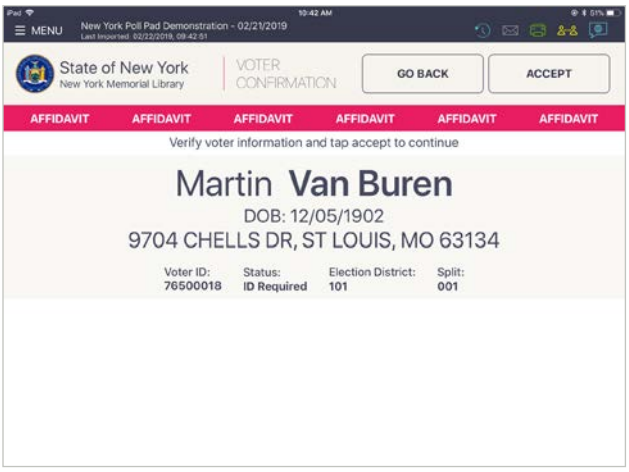
2 LOCATE VOTER'S RECORD AND READ PROMPT

Lookup the voter's record. You'll notice their record contains a status that reads "Inactive." Press voter record.



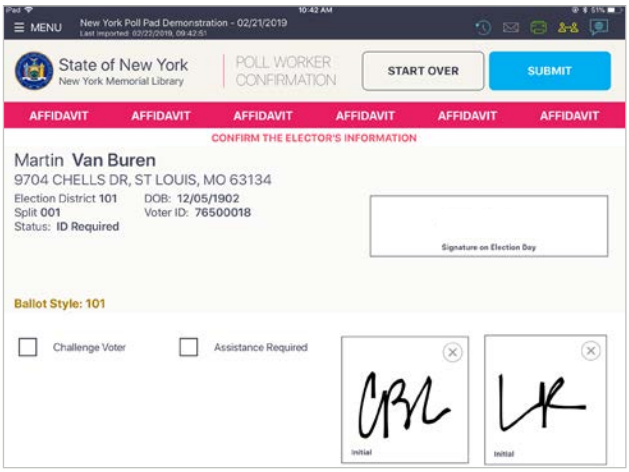
3 FOLLOW PROMPT

Read the instructions on the prompt and offer the voter an affidavit ballot.



4 VOTER CONFIRMATION

Screen displays voter's information. Verify information, if all is correct press **ACCEPT**.

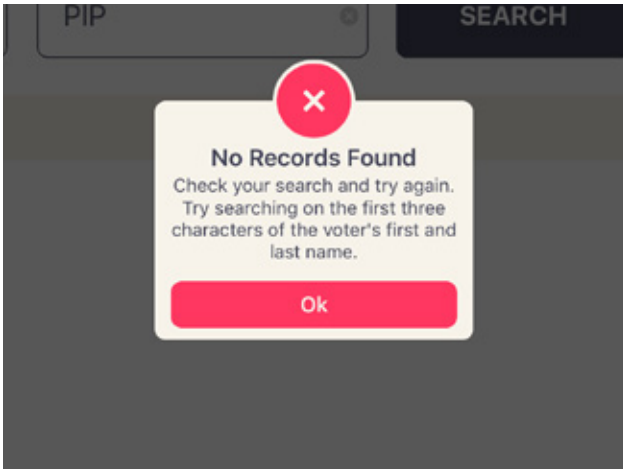


5 POLL WORKER CONFIRMATION

Poll worker confirmation screen will appear.
Poll worker to confirm all information is correct.
If correct, initial in provided field then press **SUBMIT**.

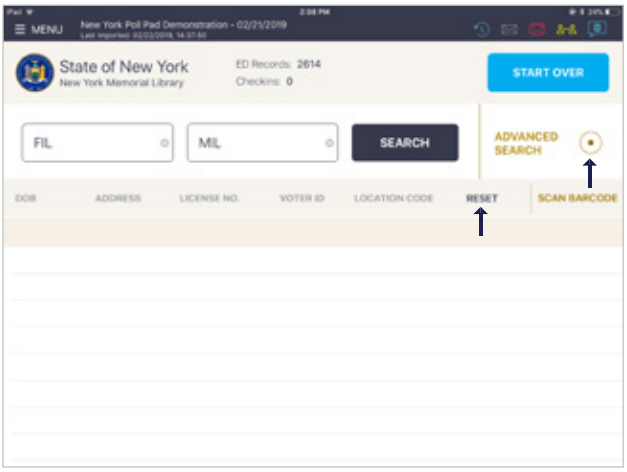
6 PROCESSED VOTER

Good Job! You successfully processed the voter. Follow polling place protocol to direct voter to next polling station.



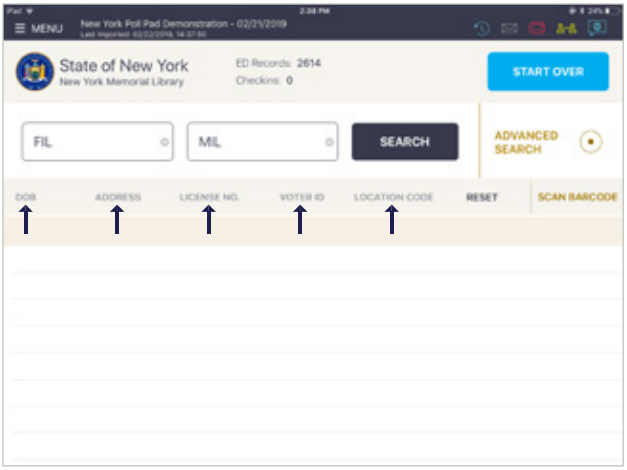
1 VOTER NOT FOUND

If Manual Entry has been used to find a voter, and he or she is still not found, a pop-up will appear reading, **No Records Found**. Press **OK** to go back to Voter Lookup.



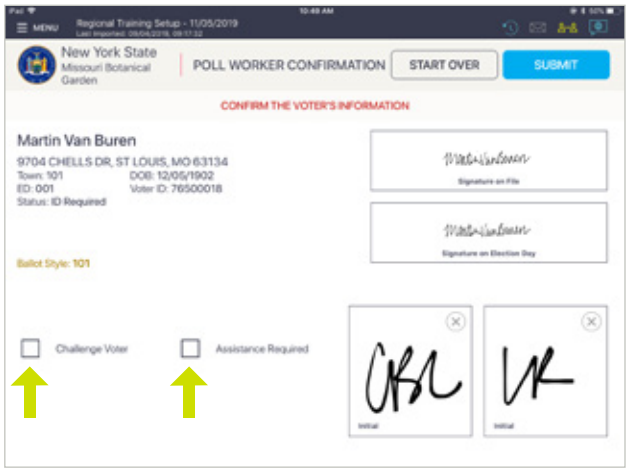
2 ADVANCED SEARCH

Once back on the Voter Lookup Screen, press **ADVANCED**. When Advanced Search bar appears, press **RESET**.



3 SEARCH BY:

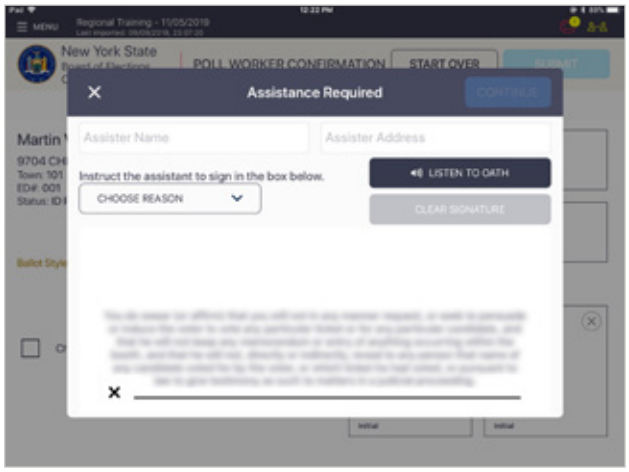
Lookup voter by using **DATE OF BIRTH (DOB), ADDRESS, LICENSE NUMBER, VOTER ID,** etc., press **DONE** then **SEARCH**. If voter is found using Advanced Search, follow same protocol as manual entry to process voter.



1 VOTER ASSISTANCE / CHALLENGE

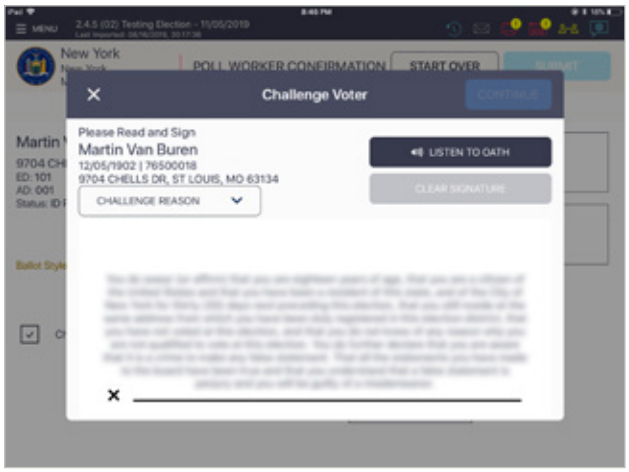
If a voter requires assistance or is challenged, press either the Assistance Required box or Challenge Voter box found on the Poll Worker Confirmation page.

NOTE: For Assistance Required go to Step 2. For Challenge Voter go to Step 3.



2 ASSISTANCE REQUIRED

Enter the assister's name and address. Instruct the assistant to read the Assistance Required Oath and sign on the signature line. Once signed, poll worker presses **CONTINUE**. Poll worker to complete voter check-in process.



3 VOTER IS CHALLENGED

The Challenge Oath and Challenge Reason drop down box will appear on the screen. Choose the reason for the Challenge. Instruct voter to read Challenge Oath and have the voter sign on the signature line. Once signed, poll worker presses **CONTINUE**. Poll worker to complete voter check-in process if it has been decided the voter is allowed to vote.

SEARCH BY SCANNING VOTER NOTIFICATION CARD

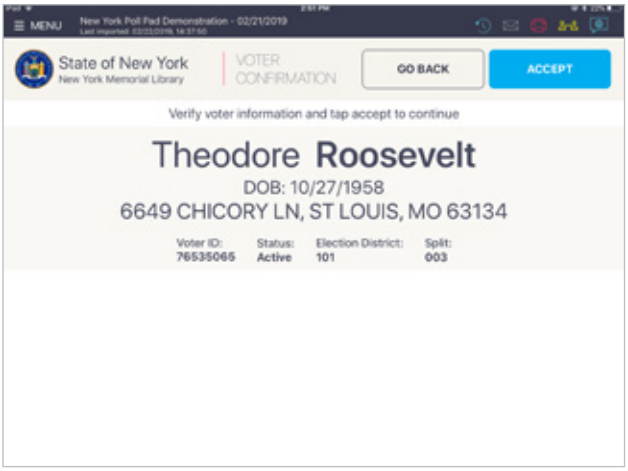
1 VERIFY VOTER'S INFO

If the voter presents a Voter Notification Card, start the check-in process by touching **Scan Barcode.**

2 SCAN VOTER'S ID

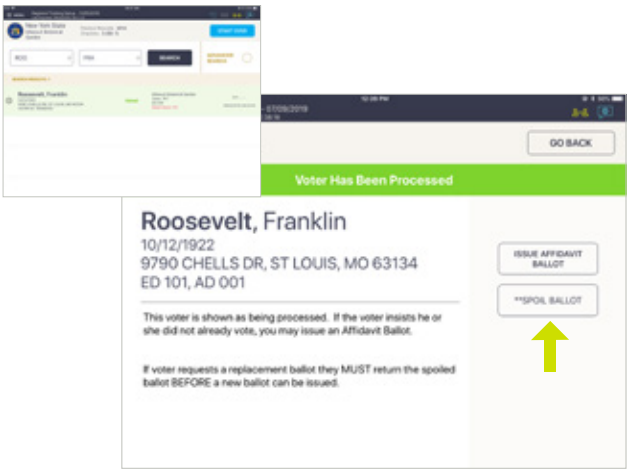
A live image of the Photo ID Tray displays on screen. Place his or her card (with the barcode facing the camera) onto the ID Tray.

NOTE: If the camera is unable to scan the voter's card or if it is not placed onto the holder within five seconds, the Poll Pad will display "Barcode Not Found." If this occurs find the voter using the manual search method.



3 VOTER CONFIRMATION

Verify information. If all is correct, press **ACCEPT** and continue the check-in process.

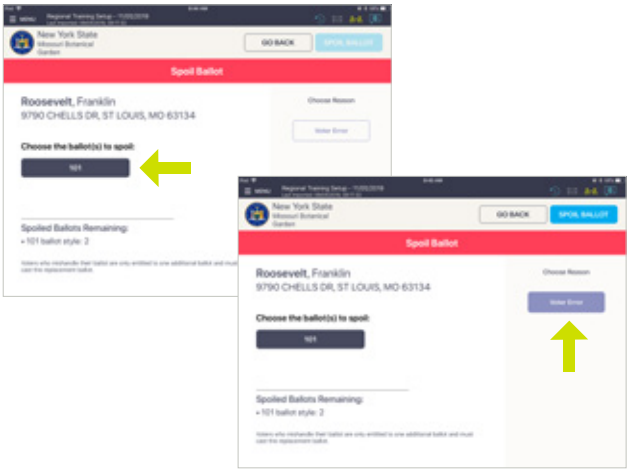


1 LOOK UP VOTER

Look up the voter's record. Once located you will notice the record is shaded green and is marked as **Voted**.

Press on the record and read the prompt in its entirety. To spoil ballot press **SPOIL BALLOT AND ENTER PASSWORD**.

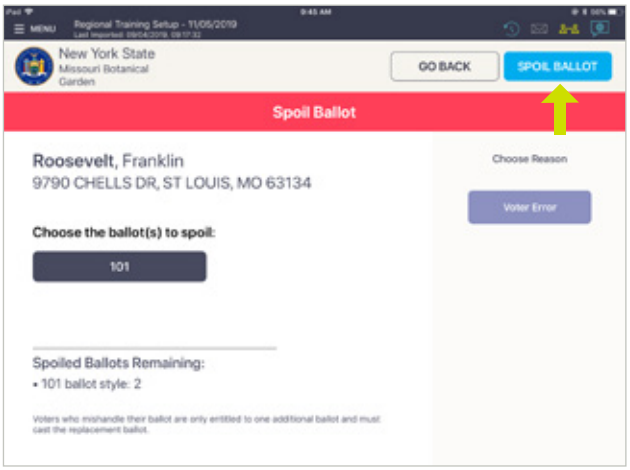
NOTE: Password is 1234



2 SELECT SPOIL BALLOT

Banner will read **Spoil Ballot**. Choose the ballot(s) to spoil. Choose reason to spoil (Ex. Voter Error).

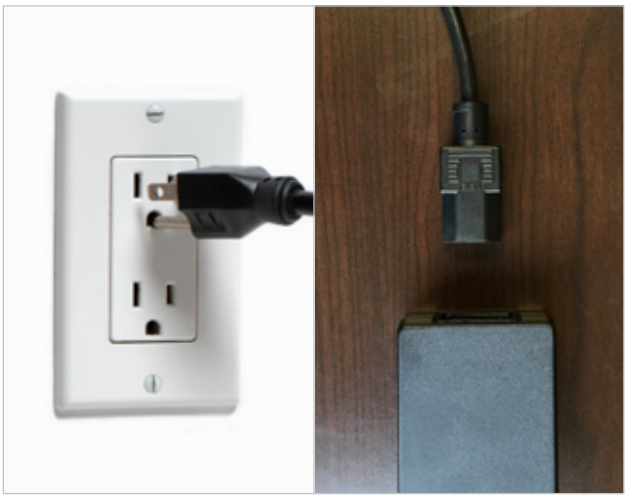
NOTE: You will notice Spoiled Ballots Remaining Count will decrease for each ballot that is spoiled. Maximum number is 3.



3 SPOIL BALLOT

Press **SPOIL BALLOT** to complete the process.

CLOSING PROCEDURES



POWER OFF & UNPLUG PRINTER

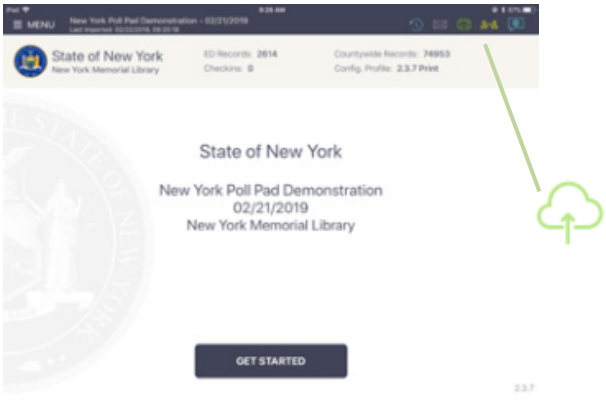
Power off the printer and unplug from outlet, disconnect printer cable from transformer box and printer.

NOTE: Keep Poll Pad powered ON

FOLD STAND ARM

After disconnecting hardware from the Poll Pad, place components back in carrying case. Once the stand arm has been removed from the Poll Pad and stand base, fold the stand arm backwards to fit in the case.

NOTE: Keep Poll Pad powered ON



SYNC POLL PAD

Sync the poll pad at the end of the night by tapping the sync icon located at the top right of the screen. The Poll Pads should be returned ON.

NOTE: KEEP WIFI HOT SPOT POWERED ON UNTIL SYNC IS COMPLETE.

PACK POLL PAD CASE (With Printer)

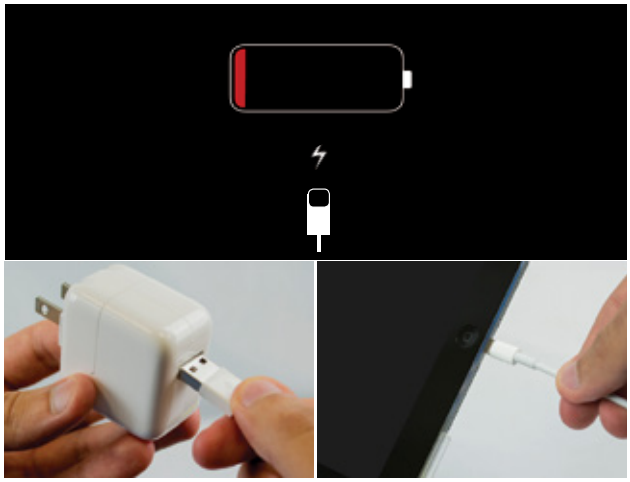
Disassemble the Poll Pad and return the supplies to the Poll Pad case.
Close the lid and secure.

❶ Green Case
❷ Poll Pad
❸ Poll Pad Base
❹ Power Cube and Cord
❺ (2) Stylus
❻ Photo ID Tray
❼ Poll Pad Screen Cloth
❽ Printer (and Cords)
❾ Stand Arm

RETURN SUPPLIES

Return Poll Pad case to the plastic bin on election night, along with extension cords.

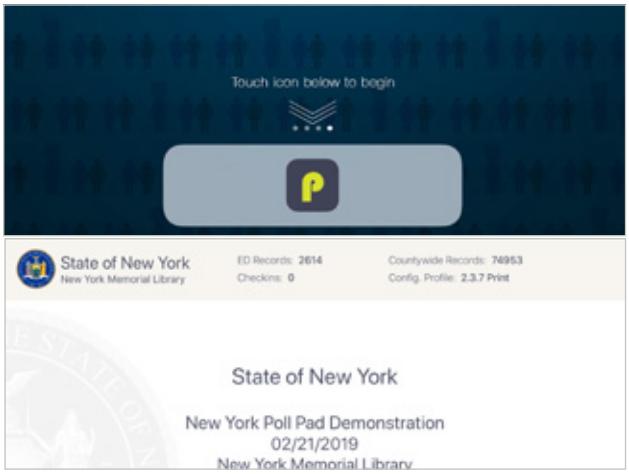
NOTE: To ensure accuracy, remember to place the Poll Pad supplies in the appropriate case/tote.



CHARGING POLL PAD

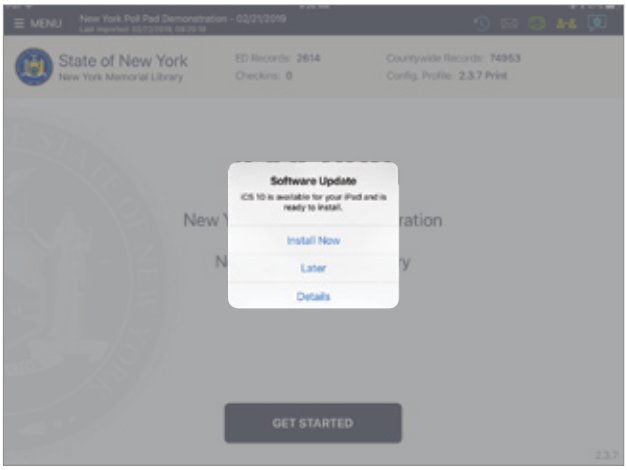
❶ Plug USB end of power cable into power cube
❷ Plug power cube into an AC wall outlet
❸ Plug power cable into Lightning Connector on Poll Pad
❹ Wait about five minutes for the Poll Pad to charge
❺ Once there is sufficient power, Poll Pad will auto power on
❻ Resume normal operations

NOTE: To confirm your unit is charging, verify battery icon is green and lightning bolt is displayed.



OPENING POLL PAD

❶ If application does not automatically launch when powered on, touch the Poll Pad App at the bottom of the Home Screen
❷ Verify the correct homepage displays on screen



iOS SOFTWARE UPDATE

DO NOT perform a software update on the Poll Pad. In the unlikely event that an iOS update prompt displays on the device, perform the following steps:

❶ Touch Later from the list of on screen options
❷ Press the Home button and verify Poll Pad app remains open

POLL PAD SCREEN IS UNRESPONSIVE

❶ Unplug unit from power source (electrical outlet, battery, etc.)

If the Poll Pad screen is unresponsive, perform the following steps:

❷ Hold down the Sleep/Wake and Home buttons simultaneously

❸ Release both buttons once the Apple logo displays on screen

❹ After application launches, return to previous activity

NOT PRINTING / STOPS PRINTING

❶ Make sure the printer is turned 'ON'

❷ Confirm the printer is plugged into outlet and cords are securely connected

❸ Check paper is installed correctly

❹ Confirm connection with Poll Pad (green icon)

CHANGING PAPER

❶ Open printer

❷ Reload paper with the paper flap toward you, feeding from the bottom/underneath roll

❸ Close and Print Test Receipt

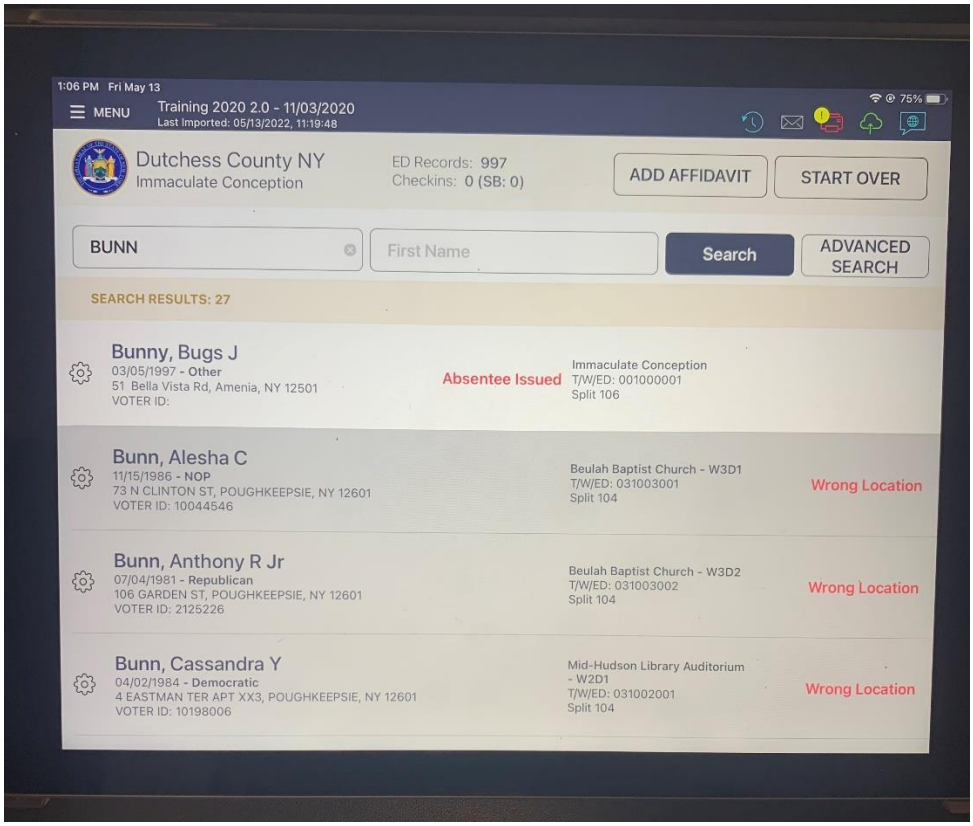
If the voter is NOT in the poll pad and would like to vote by Affidavit:

1. Tap “Add Affidavit” button on the top right of the poll pad screen.
2. Enter the voter’s information into the poll pad
    a. **For the DOB field, please select the YEAR first**. Note: the DOB selector will not close on its own. To proceed to the next screen, please tap “Next” on the top right corner of your screen.
3. Enter the voter’s street number.
4. Tap into Street Name and begin typing the street. **You <u>must</u> choose the complete address from the drop down list – <u>DO NOT</u> enter the complete address on your own.** If the voter has an apartment or unit number, you may enter that **<u>AFTER</u>** selecting the address from the drop down list.
5. Tap “Next” on the top right corner of your screen.
6. Confirm the information entered is correct, then tap “Submit” on the top right corner of your screen. Tap “Accept.”
    a. **<u>NOTE</u>**: If the voter’s information does not appear, and a screen that says “Group” appears instead, you did not select the address from the drop down list. Please tap “Previous Step” in the top left corner of your screen and select the address from the list.
7. Another confirmation screen with the voter’s information will appear. A red banner will appear across the top reading “Affidavit Ballot.” Confirm the information is correct and tap “Accept.”
8. Both poll workers must initial on the Poll Worker Confirmation page, then tap “Submit.”
9. A receipt will print with the voter’s information, “Affidavit Ballot” across the top, and the voter’s ballot style.
10. Give the voter their receipt, the correct Affidavit Ballot, and a white affidavit envelope.
11. Direct them to a voting booth to complete the envelope and ballot. Once complete, they will return the envelope to you sealed with their ballot inside.
12. Check that the envelope is completely filled out and sealed before placing into the larger manila envelope and writing their name on the front.
13. If the voter has to spoil their affidavit ballot, please look them up in the poll pad and process the spoiled ballot as described in your manual. The voter’s name will now appear in a search highlighted in purple.

**** If the voter’s address does not appear in the drop down list, please call the BOE before proceeding****

Absentee Voters in the Poll Pads

1. **When you look up a Voter in the Poll Pad and see the notification "Absentee Issued," you will be unable to check the Voter in and issue a Ballot.**



2. **If this Voter desires to vote in person at the polling site on Election Day, they will have to vote with an Affidavit Ballot. "Affidavit Ballot" will be the ONLY option for an absentee voter to proceed on the Poll Pad when you pull the Voter up.**

3. **Follow the Affidavit procedure to issue the Voter an Affidavit Ballot.**

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