

Electronic Pollbook (EPB) Training, 2012

[Datacard® Advocate™ Precinct Control Center (PCC)]

Revised for Fairfax County, VA Election C/AC

NOTICE:

Do not attempt to operate or repair this equipment without adequate training. Any use or operation you perform that is not in accordance with the information contained in this documentation is at your own risk. For Problems in opening, during the day or in closing – contact **Technical Support at the Office of Elections, 703-324-4101.**

Contents

Welcome	2
Before the Polls Open: Set Up	2
Opening the Pollbook	5
Voter Search Screen	6
During the Election	
Search for a Voter	7
Simple Search	7
Advanced Search	7
Check In Voters – Voter Details page	8
Other Functions	
At Same Address	9
Countywide Voter Search (not available for Town elections)	9
Option Reminders	9
End of the Day	
Closing the Polls	10
Final Directions	10
Chief /Assistant Chief Addendum	
Special Functions	11
Chief's Password Usage	11
Add a Voter	12
Undo Check In	12
Verify Network / Troubleshooting	12

Datacard Group

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Welcome

Datacard® Advocate™ Precinct Control Center (PCC) / Electronic Pollbook (**EPB**) is a complete poll-book management solution that enables election officials and poll workers to automate many of the manual, paper-based procedures used to process voters on Election Day.

Each PCC computer contains the voter registration data for your precinct. It also may contain voter data for the entire jurisdiction to help you redirect voters to the correct polling place.

Searching for voters within the precinct is quick and easy. Enter search criteria such as a name. The search screen immediately displays lists of voters with that criteria and includes essential information for finding the exact voter to check in. When you select a voter, you will see the necessary details for that voter and then be able to check the voter in to vote.

Remember, all voter information is confidential, for use only to check in voters.



During the day you can display the number of voters checked in as well as turnout percentage. The PCC keeps track of voters who were checked in, NOT voters who did or did not vote.

This document explains how to use the Advocate Precinct Control Center software on Election Day.

Before the Polls Open -- Set Up

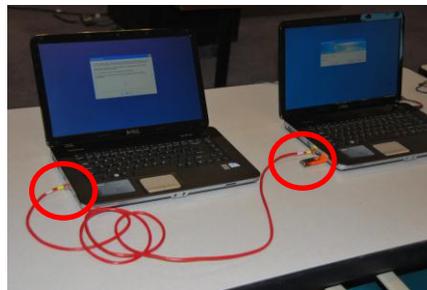
1. Open the EPB peripheral supply plastic bag. Each bag contains:
 - 2 power cords (bricks)
 - 2 mouses and 2 mouse pads
 - 1 power strip
 - 1 extension cord
 - For precincts using only 2 EPBs: 1 crossover cable (gray or red cable with yellow tape on both ends)
 - For precincts using more than 2 EPBs: 1 network cable per EPB (blue cable with yellow tape on one end and green tape on the other end) with 1 network Hub; and 1 network cable (gray or red cable with yellow tape on both ends)
 - The Sheriff will deliver the USBs to the chief on the Monday prior to Election Day.

Note: Cables and plug in ports on the sides of the EPBs are color-coded with tape for your convenience.

- For each EPB, connect the power cords (red tape) into the appropriate port (red tape) on the right side of the EPB. Connect the cords into the provided power strip.

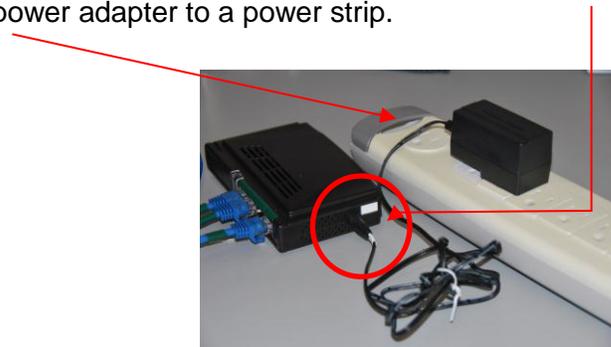


- IF YOU ARE USING 2 EPBs:** Connect the crossover network cable (gray or red, with yellow tape) into the network port (yellow tape) on the left side of each EPB (connecting the two computers).

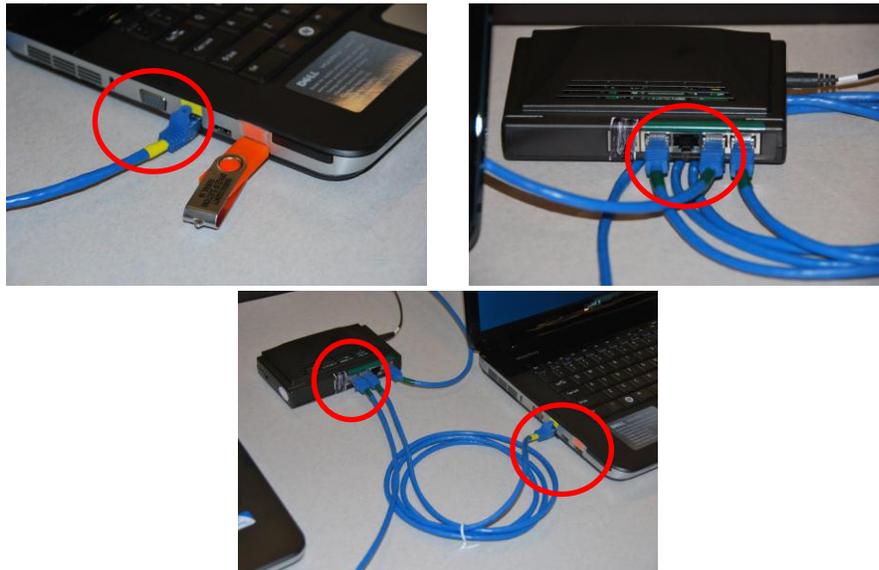


- IF YOU ARE USING MORE THAN 2 EPBs:**

- Connect the network Hub power adapter (white tape) to side of hub (white tape). Connect the other end of the power adapter to a power strip.



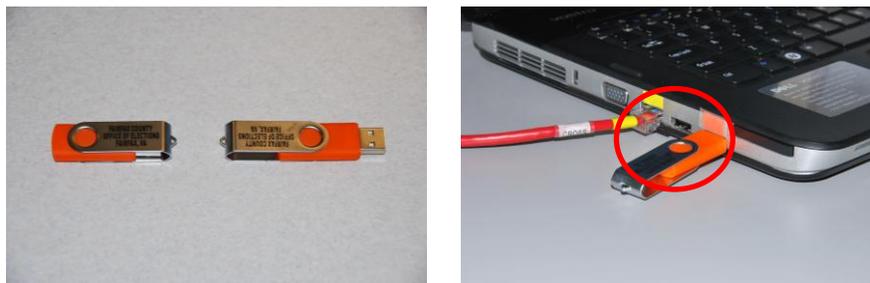
- Connect a network cable (blue cord / yellow tape) into the network port (yellow tape) of each EPB and then connect the other end of the same network patch cable (blue cord / green tape) into the network Hub.



5. Connect the mouse cord (blue tape) into the USB port (blue tape) on the **right** side of the EPB – this will be the bottom USB port.



6. Locate USB flash drive (orange body). Rotate the metal cover so that the USB connector is exposed. Insert USB into USB port (orange tape) on the **left** side of EPB (same side as the network crossover cable). The label that says “FAIRFAX COUNTY OFFICE OF ELECTIONS FAIRFAX, VA” should be facing up.



7. Final check: Confirm that all EPBs are plugged into the power strip, the power strip into an electrical plug and the power strip is turned on. Make sure all cords are out of the way of election workers and voters, taping them down as needed. Make sure that all EPBs are connected!

Opening the Pollbook, supervised by Chief – **Do steps 1 - 4 on ALL EPBs.**

1. Power on all EPBs.
 - a. Verify that the “Legal Notice” is displayed on all EPBs, then click OK.
 - b. Click on the Advocate Application user icon.
 - c. Enter **Advocate Application password** (provided to Chief) on all EPBs, then click on the right-pointing arrow. The Fairfax County Seal and the Advocate PCC icon is displayed.
 - d. If an “AutoPlay, Fairfax EPB:E” pop-up appears, press ESC on your keyboard to remove.
 - e. Double click on the Advocate PCC icon located on the upper left of your screen.
 - f. The “Advocate Precinct Control Center” screen appears, click on Browse.
 - g. A “Poll Book File” pop-up appears (A poll book file was found on the USB: drive:), click on Yes.

The pollbook will begin loading. This may take up to 4 minutes.

2. Confirm Election Name and Election Date on all EPBs.



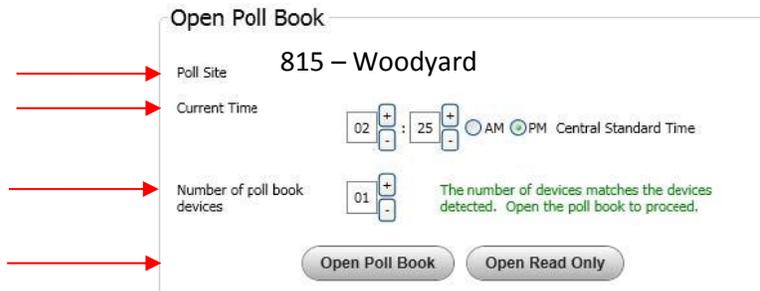
3. Log on to ALL EPBs using the election officer **Advocate PCC password** that you were provided, then click log in. Verify that the cursor is blinking in the log in box prior to typing password (click in the box).

4. At “Live Backup Folder Location” pop-up appears (Do you want to store the live backup to this location?), click on Yes.



The following step needs to be done at *only one* of the EPBs in your precinct. You must verify that the information is the same on all EPBs.

5. You are now at the **Open Poll Book** screen:



- a. Verify that the precinct name and number of your precinct are the same on all EPBs.
- b. Verify that the Current Time agrees with the official election clock. Adjust the time if needed.
- c. Verify that the *Number of pollbook devices* (EPBs) matches the number of EPBs you have networked together.
- d. Click on Open Poll Book. (DO NOT CLICK ON *Open Read Only*)
The **EPB Search** screen will display.



NEVER LEAVE AN EPB UNATTENDED

Voter Search Screen

Precinct: 815 - WOODYARD
Voters: 2820 | Checked In: 0 | Election Status: Open

Log Off | Text Size: A A A

Search: [Search] [Clear]

Search Scope: Precinct [All]

Voter ID	Last Name	First Name	Middle Name	YOB	Address Line 1
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0 Matches | Page 1 of 1

Options: Election Notes, Poll Book Summary, Add Voter, Close or Suspend Poll, Network Devices, About

1/27/2012 2:24 PM | Election Date: 3/6/2012 | Prepared: 1/27/2012 11:28:30 AM | Status: Connected | 1 Total Device(s) | Plugged in (Battery 100%)

1. Confirm that the following information located in the upper left-hand corner of your search screen is correct:
 - a. Precinct number and name.
 - b. "Checked in" equals 0 (ZERO).
 - c. "Election Status" is Open.
 - d. The number of voters in your precinct is also displayed in this area of the screen.
2. Confirm that the following information located in the lower left-hand corner of your search screen is correct:
 - a. Date and time.
 - b. Election date.
3. Confirm that the following information located in the lower right-hand corner of your search screen is correct:
 - a. "Status" is Connected.
 - b. "Total Device(s)" equals the number of EPBs that you are operating in your precinct.
 - c. "Plugged in" indicates that your laptop is plugged in and not operating on the battery.
4. The upper right-hand corner of your screen displays the following:
 - a. "Text Size" allows users to adjust the size of the text.
 - b. "Search" is used to activate search for voters.
 - c. "Clear" function is used to clear previous search results.
 - d. "Search Scope" used to toggle between Precinct search and Countywide search.
 - e. "Log Off" is used *ONLY* if instructed to do so by your Rover or Election Command Center Technical staff.
5. The "Options" function located in the lower left-hand corner of the screen provides users with the following information:
 - a. "Election Notes" might be used by chief to enter election or precinct information, *NOT* voter related information. Not required; must use "Chief Notes" to document events/incidents.
 - b. "Pollbook Summary" allows user to see the number of voters - "Checked in count"; "Absentee Count"; "OP, or outside the polls count"; and "% turnout" (turnout percent).
 - c. "Add Voter": this function is ONLY to be used by the Chief, and ONLY if authorized by the Registrar. Note details in "Chief Notes".
 - d. "Close or Suspend Poll": this function is *ONLY* to be used by the Chief.
 - e. "Network Devices" verifies the number of EPBs networked in the precinct.
 - f. "About" provides PCC version and copyright information - Do not use.



Code of Virginia, §24.2-1009: Stealing or tampering with ballot containers, voting or registration equipment, software, records or documents is a class 5 felony.

NEVER LEAVE AN EPB UNATTENDED

During the Election – This section tells you how to use the EPB to Check In voters during the day.

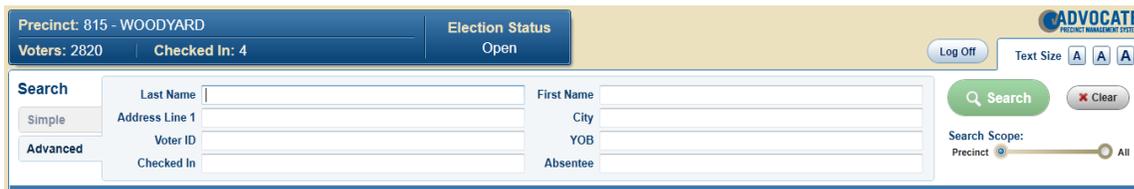
Search for a Voter - The EPB offers two search options, **Simple** and **Advanced**.

Simple Search - feature most often used to search for voters in your precinct.



1. Click on clear (**x Clear**), located in the upper right-hand corner of the screen to remove text and/or previous search results.
2. Click in the text box and type the voter's **last** name. As you type, records appear that match the letters you have entered. You can refine your search by entering a comma (,) after the last name and then beginning to type the **first** name.
3. If there are multiple pages in your search, you can click on "**Next Page >**", located near the bottom left-hand section of your Search screen, then scroll through the pages.
4. (Optional) You can sort records by First Name by clicking on up arrow of the First Name column. Click the arrow of the First Name again to sort in descending order.
5. When voter's record appears on the screen, double click anywhere in the row to open the Voter Details screen. **Go to page 8 for Voter Check In instructions.**

Advanced Search - The Advanced Search function allows users to conduct a voter search using additional search criteria.



1. Click on "Clear" (**x Clear**), located in the upper right-hand corner of the screen to remove text and/or previous search results.
2. Click on the "Advanced" search button which is located under the "Simple" search button in the upper left-hand corner of your screen.
3. Enter voter data in one or more of the search fields; then click on Search.
4. To search the Absentee field, type the word "True" (lists voters marked with an AB), or type the word "False" (lists voters not marked with an AB) , then click on Search.
5. To search the Checked In field, type the word "True", (lists voters that have been checked in), or the word "False" (voters that have not been checked in), then click on Search.
6. When voter's record appears on the screen, double click anywhere in the row to open the Voter Details screen. **Go to page 8 for Voter Check-in instructions.**

If you cannot find the voter using either the Simple Search, Advanced Search, or Countywide search, call the Registrar's Office at 703-222-0776.



Precinct: 815 - WOODYARD
Voters: 2820 Checked In: 4

Election Status
Open

Log Off Text Size A A A

Voter Details

Voter ID: 917484375	Status: Active	Precinct: 815 - WOODYARD
Last Name: SMITH	Address:	Town Prec.:
First Name: CHARISSA	Line 1: 6824 Brimstone Ln	
Middle Name: LYNNE	Line 2 3:	
YOB: 1956	City Zip: Fairfax Station 22039-1848	Election: 2011 November General
Gender: F	Mailing:	Checked In: False (No)
Congress: 11	Address:	Absentee: False- (No)
Senate: 039	City Zip:	
House: 040		

Election Day Flags

OP - Voted outside polls

Signed Affirmation of Eligibility, Identity or Assistance form.

Voter Messages

✔ Ready to Check In

✔ Check Voter In

Same Address Back To List

Options

1/27/2012 2:38 PM Election Date: 3/6/2012 Prepared: 1/27/2012 11:28:30 AM Status: Connected | 2 Total Device(s) Plugged in (Battery 100%)

1. Confirm that the voter information displayed on the Voter Details page is correct, i.e., does the name and address match the voter’s? **Caution:** watch for voters with same name at same address. Name suffixes do not show in Search List; may in Voter Details; look at voter’s date of birth!
2. Verify that there are NO messages listed on the bottom left-hand screen that require additional action, i.e., ? – Inactive voter, H – Personal ID required, AB –Absentee Ballot was requested by voter.



Voter Messages

⚠ Ready to Check In

? - INACTIVE VOTER CALL CHIEF. For questions, call 703-222-0776.

✔ Check Voter In

Options

1/27/2012 2:42 PM Election Date: 3/6/2012 Prepared: 1/27/2012 11:28:30 AM

The same rules apply for checking a voter in on an Electronic Pollbook as with a paper pollbook regarding ID requirements and special codes by their names. You must also repeat the voter’s name and address out loud.



If this is not the correct record for the voter, click on “Back To List” (bottom right corner). A pop-up notice will appear prompting you to confirm that you want to return the list. Click on Yes to return to the voter search screen.

3. If required, select one of the two Election Day Flags located in the upper right-hand column. Select “OP” for voters who “Voted Outside the Polls”. Select “Signed Affirmation of Eligibility, Identity, or Assistance form”, for voters who are required to complete these forms. You can select a flag after the voter has checked-in by searching for the voter again, then selecting the appropriate voter flag. Go “Back to List” when done.
4. When you are ready to check in the voter, click on the green “Check Voter In” button located in the lower left-hand side of your check in screen. Then click on “Confirm”, which is located on the lower right-hand side of your screen. This will take you back to the “Voter Search” screen.
5. To check in the next voter, click on “Clear” (**x Clear**), located in the upper right-hand corner of the “Voter Search” screen and then repeat the Search steps from page 7.
6. On the rare occasion it is needed, supplemental information can be noted about a voter: select “Voter Notes” located near the bottom right-hand corner of the “Check In” screen and enter the comments. Click on Save. [Currently Fairfax County is not using this feature.]

Other Functions of the Electronic Pollbook:

Voters at Same Address - If an entire household comes to vote at the same time, you can use the Same Address button to find all of them quickly.

1. Check in the first voter (see Check In Voters, instruction on page 8).
2. Search for that voter again and go to the Voter Details page.
3. Click on the "Same Address" button located near the bottom right-hand section of your screen. All voters at that exact address will appear on the Search results page.

Perform a Countywide Voter Search - If you cannot find a voter in your precinct search, it is possible that the voter does not reside in your precinct. You may be able to provide information for the correct polling place by performing a Countywide search (Note: Function is DISABLED for all Town Elections).

1. On the "Search Scope" function, located near the top right-hand of your screen, click on the "All" button.
2. Click in the "Search" field. Enter the voter's **last** name, followed by a comma (,) then enter first few letters of the **first** name. The screen displays a list of voters which match the criteria that you entered. Click anywhere in the row to select the voter that you are searching for.
3. The voter's precinct number and name will be displayed in the lower left-hand of your screen. 
4. *Polling Place Address and Map features are disabled and NOT available for use.*
5. NOTE: The Search Scope setting does not automatically return to "Precinct" when you are done. You must select "Precinct" to return to your precinct search.

In the case of a Dual Primary...when there is a Primary Election for the Democratic Party and the Republican Party on the same day in the same precinct...there is an additional step required to Check In a voter:

1. Open the Voter's Detail page and confirm the identification.
2. Click on CHECK IN (lower left).
3. "Select Voter's Party" [new screen, lower left].
 - a. In drop down box, select the party whose primary the voter will vote in.
 - b. Click on CONTINUE.
4. Click on CONFIRM (lower right).

Any questions or problems about checking in a voter should be referred to the precinct Chief for resolution.

 **If you cannot find the voter using the Simple Search, Advanced Search, or Countywide Search, you must call the Registrar's Office at 703-222-0776.**

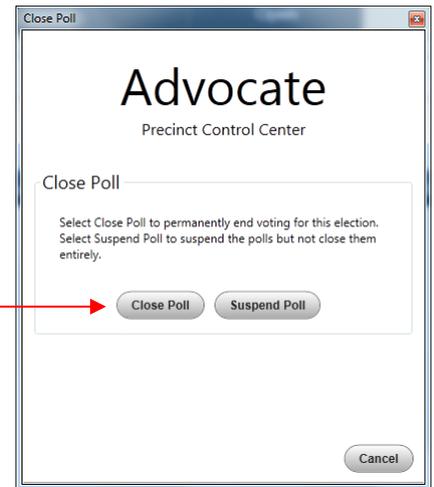


NEVER LEAVE AN EPB UNATTENDED

End of the Day -- The following steps are performed **ONLY** after the polls close at 7 p.m. and the last voter has voted. Closing the polls is to be performed **by the Chief** on only 1 (one) EPB.

Closing the Polls

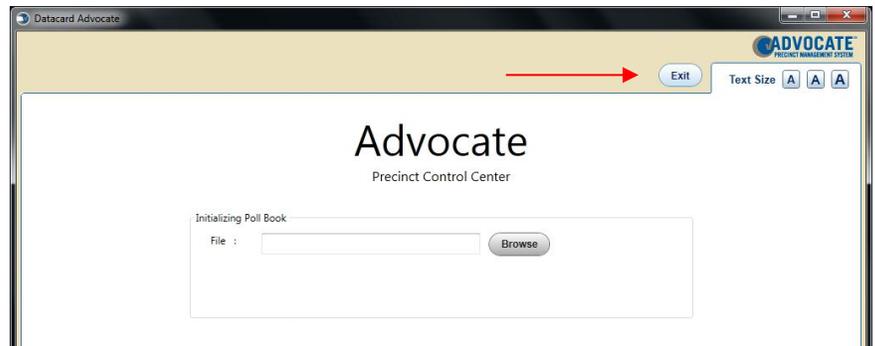
1. Record the total **Checked In Count** on your poll book certification sheet. The “Checked In” number is found near the upper right-hand EPB screen (“Checked In”), OR by selecting the “Poll Book Summary” report from the “Options” feature which is located near the lower left-hand EPB screen.
2. After the total Checked In Count has been recorded on your poll book certification sheet, the Chief will Click on “Options” (located near the lower left-hand EPB screen, then click on “Close or Suspend Poll” . Then select “Close Poll”. This step should only be performed on 1 (one) EPB.
3. A “Presiding Judge Log In Required” pop-up appears. The Chief must enter the “Chief’s Password”, then click on Log In. A “Precinct Management Initializing” pop-up appears and a green status bar will appear. When the status bar is complete, ***closing the polls and exporting the data are now complete.***



The following functions must be performed on all EPBs:

(Another “Advocate Precinct Control Center” screen appears.)

1. Click on “Exit”, which is located near the upper right-hand area of the screen. You have now logged out of the Advocate PCC.



2. Move your mouse/computer curser to the bottom the EPB screen. Click on the Windows Explorer icon, then click on “Shut down”.

Final Directions

1. After your EPBs have completely shut-down. Remove the orange USBs from each of the EPBs. **Place all USBs in Envelope # 2.**
2. Remove the EPB peripherals (mouse, power cord, etc) from the EPB and re-pack in clear plastic bag. Place EPBs in the black padded sleeves. Place clear plastic bag and EPBs in the Precinct Cart for return to the warehouse.

Chief / Assistant Chief Addendum:

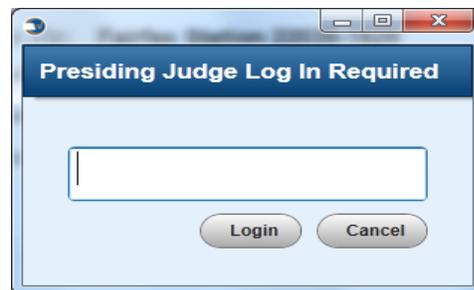
Your Special Functions

<p>Why will the Chief be called when a Voter is checking in? The following voter messages will appear:</p>	<p>Where will the Chief find the answers on what to do?</p> <p>First, <u>consult the <i>What Ifs</i></u> (see <i>What If</i> items listed); additionally, call the Registrar.</p>
<p>Inactive Voter</p>	<p>No change to voter information (<u><i>What Ifs</i> 3</u>)</p>
<p>H [HAVA voter]</p>	<p>This voter must show HAVA required identification. Without such, may only vote on Provisional Ballot. (<u><i>What Ifs</i> 1&2</u>)</p>
<p>“Address Confirmation Required”</p> <p>[In most instances this requires a call to the Registrar’s Office.]</p>	<p>Voter did not move (<u><i>What Ifs</i> 3</u>)</p> <p>Moved within precinct (<u><i>What Ifs</i> 4</u>); must also check w/Registrar</p> <p>Moved within VA (<u><i>What Ifs</i> 5 & 6</u>)</p> <p>Moved out of state (<u><i>What Ifs</i> 7</u>)</p> <p><u>[Watch for additional forms to complete]</u></p>
<p>“AB: Check Voter Eligibility – An absentee ballot was requested by this voter.”</p>	<p>First check the Absentee Status of the voter – do an Advanced Search for the voter, including a “True” statement for Absentee. This should provide more detail about the status of that voter’s absentee application:</p> <p>If “TRUE on machine”... <u><i>What Ifs</i>, 19-1-a</u></p> <p>If “TRUE marked” ... <u><i>What Ifs</i>, 19-1-a</u></p> <p>If “TRUE unmarked” ... <u><i>What Ifs</i>, 19-1-b</u></p> <p>If “TRUE issued” ... <u><i>What Ifs</i>, 19-2</u></p> <p>If voter brings absentee ballot to the precinct ... <u><i>What Ifs</i>, 19-3</u></p>

Some actions require use of the Chief’s Password:

You will see this pop-up box on the screen. Enter the Chief/Presiding Judge password you were given (along with other secure items [Smartcards, etc.]); then click “Login”.

If this box is observed on the computer screen during the day, without direction by the Chief, please have the Election Officer who is logged on select Cancel.





Remind your officers of the Code of Virginia, §24.2-1009: Stealing or tampering with ballot containers, voting or registration equipment, software, records or documents is a class 5 felony.

Add a Voter



Call Registrar at 703-222-0776. This function can only be performed if you have been given the authorization of the General Registrar, Deputy Registrar, or Assistant Registrar. It requires the Chief's authorization and password. Record the details of this situation in the Chief Notes, located in the Election Procedure Notebook, including the name of the voter, Registrar's name and time.

1. Click on "Options" located in the lower left-hand corner of your EPB, then select "Add Voter". A "Presiding Judge Log In Required" pop-up appears.
2. Enter the Chief's password, then click on Login.
3. Enter the information as it is given to you by the Registrar's office (the Voter ID number, Last Name and First Name).
4. Click on "Save". The screen returns to the Voter Check In screen. You can now check in the voter. Note: a "Voter Note" is automatically generated for this voter.

Undo Check In - To make a correction if a voter was checked in by mistake. This is a Chief-only function.

IMPORTANT...The name of the voter who was removed from *Checked In* status must be listed on the Electronic Pollbook Certification form. The details must be explained in Chief's Notes in the Election Procedure notebook. (These records will make it easier to verify numbers at the end of the night!)

1. Search for the voter as described in **Search for a Voter** (see page 7).
2. Double click anywhere in the row of the voter that needs to be unchecked.
3. On the "Voter Details" page, click on "Undo Check-in". A "Presiding Judge Log In Required" pop-up appears. Enter the Chief's password, then click on Log In.
4. Confirm that this is the voter that you need to "Undo Check In", then click on "Confirm", located in the lower-left of your EPB screen. (The number of *Checked In* [voters] will go down by one on all EPBs.)
5. Click on "Confirm". Screen returns to the list of voters. Note: Do not "log off" as Chief. The EPB automatically defaults back to the user mode.

Verify Network -- In the event that the Technical Command Center needs to troubleshoot an EPB, the Chief can verify that all/ some/ or no EPBs are networked.

1. Click on the "Options" icon, located in the lower left-hand area of your EPB screen. Then select "Network Devices" - the Network Devices dialog box opens and displays the number of EPBs currently on the network.
2. Click on "Close" to return to voter search screen.

If one computer fails –

Call the Election Command Center at 703-324-4101. They will instruct you as to how to proceed. If necessary, a Rover will be sent to your precinct to assist you with resolving the issue.