POLL PAD | training guide

THE STATE OF **TEXAS**

knowINK
Innovative Election Solutions

❶ 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 iPad will power on, and the Poll Pad application will launch automatically.

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

❷ 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)
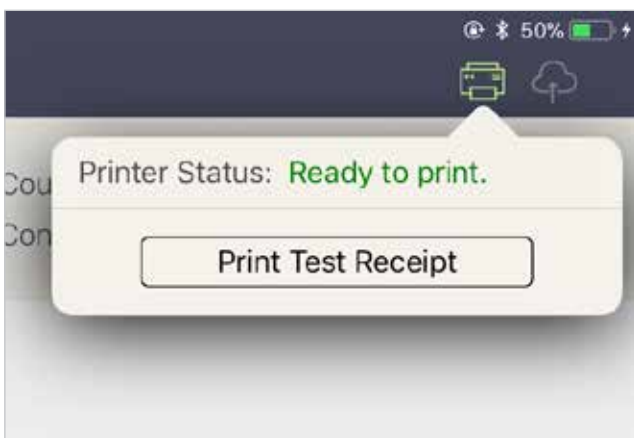
❸ CONNECT & TEST PRINT

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

Green Printer Icon: Poll Pad is paired with the printer. A receipt will print out for checked-in voters.

Yellow Printer Icon: Poll Pad recognizes the printer and is currently in the process of pairing with the device.

Red Printer Icon: Poll Pad is not paired with the printer. Select the printer icon, followed by Pair and Connect. Contact Elections office.

MULTI-PEER ICONS & COLORS

Green: Poll Pad is currently connected and synchronizing with the other precinct Poll Pads.

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

Yellow: Poll Pad recognizes the presence of other precinct Poll Pads but is not connected or synchronizing with these units.

Red: The Poll Pad is currently disconnected and not synchronizing with the other precinct Poll Pads. Contact Elections office.

CLOUD SYNC ICONS & COLORS

Green Cloud Icon: Poll Pad is currently connected and synchronizing with the central election database.

Yellow Cloud Icon: Poll Pad is in the process of connecting to the central election database.

Red Cloud Icon: Poll Pad is currently disconnected and not synchronizing with the central election database. Contact Elections office.
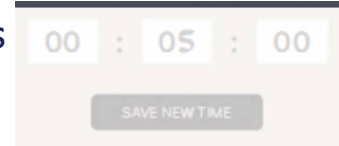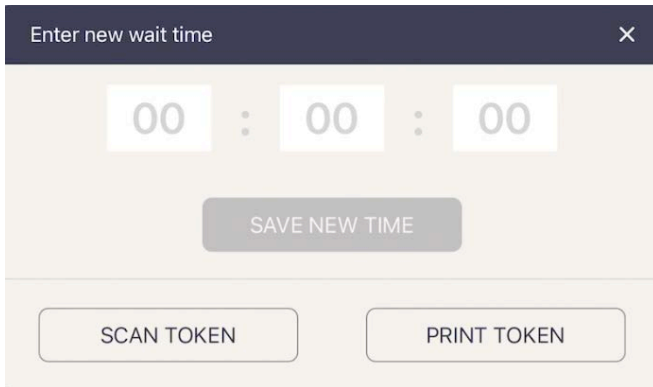
1 ENTER NEW WAIT TIME

Enter wait time and select **SAVE NEW TIME**

Note: Enter time in hours, minutes, seconds.
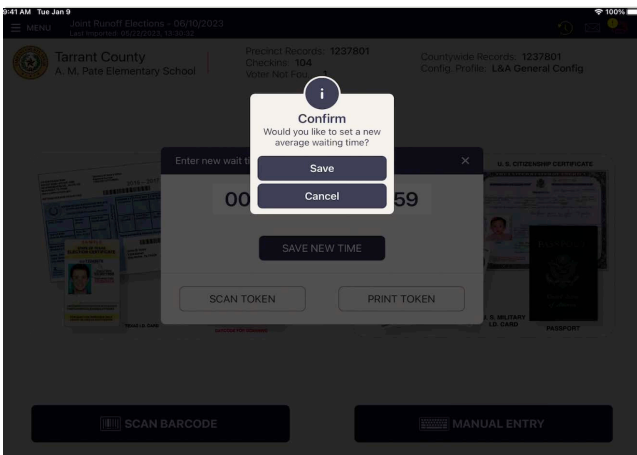ex. 5 minutes

Wait time will pop-up about every 90 minutes.

2 CONFIRM

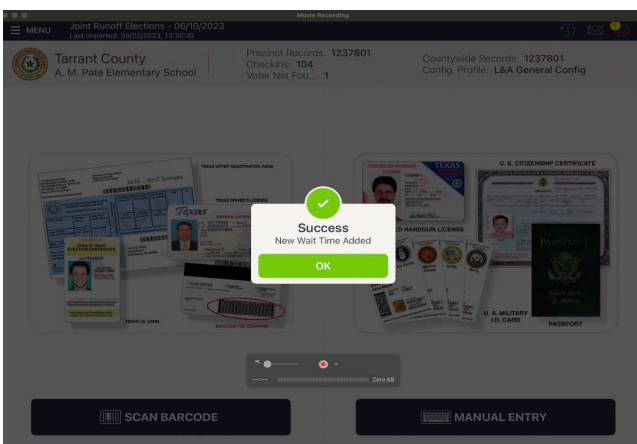Would you like to set a new average waiting time?
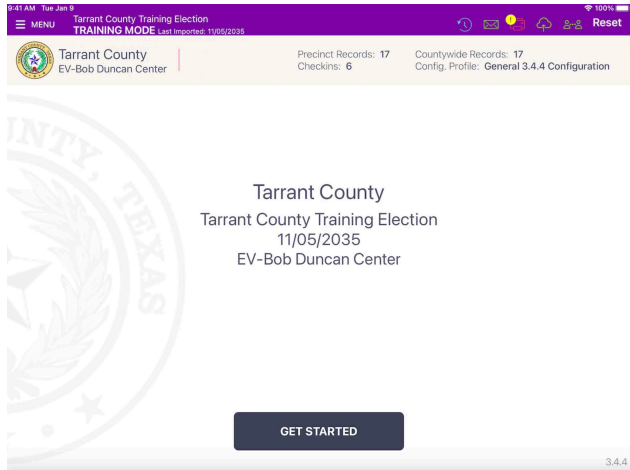
Select **Save**
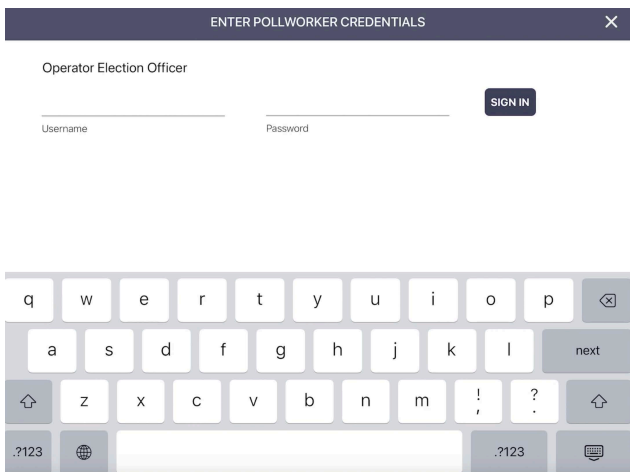

3 SUCCESS
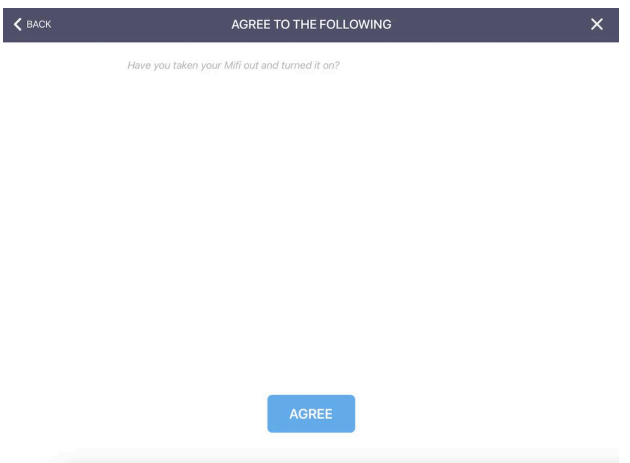
New Wait Time Added

Press **OK**

1 **LOGGING INTO POLL PAD**

Press **GET STARTED** button at the bottom of the screen.

2 **ENTER POLLWORKER CREDENTIALS**

Enter Username and Password, then press **SIGN IN.**

3 **AGREE TO THE FOLLOWING**

Question: Have you taken your MiFi out and turned it on?

If you have turned on the MiFi, press **AGREE** at the bottom.

If you haven't turned on the MiFi, turn it on now, then press **AGREE.**

① VERIFY VOTER'S INFO

Ask the voter to provide an acceptable form of ID. After verifying the voter's ID is valid, start the check-in process by touching **Scan Barcode.**

② SCAN VOTER'S ID

Place his or her photo ID with the barcode facing the camera to scan.

NOTE: If the camera is unable to scan the voter's photo ID within five seconds, the Poll Pad will display "Barcode Not Found." If this occurs find the voter using the manual search method.
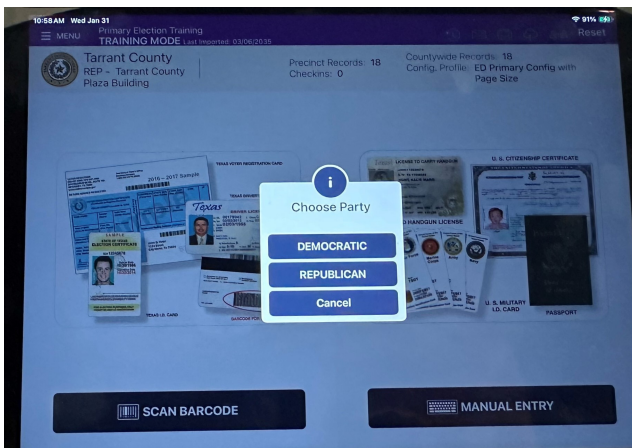

③ VOTER CONFIRMATION

Once the barcode is recognized, the screen displays the voter's information. If all information is correct, press **ACCEPT**.
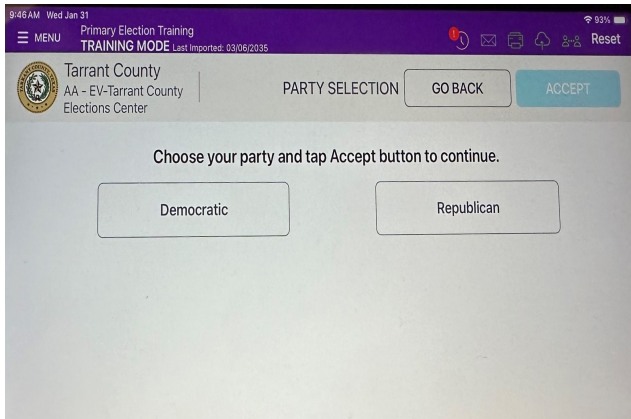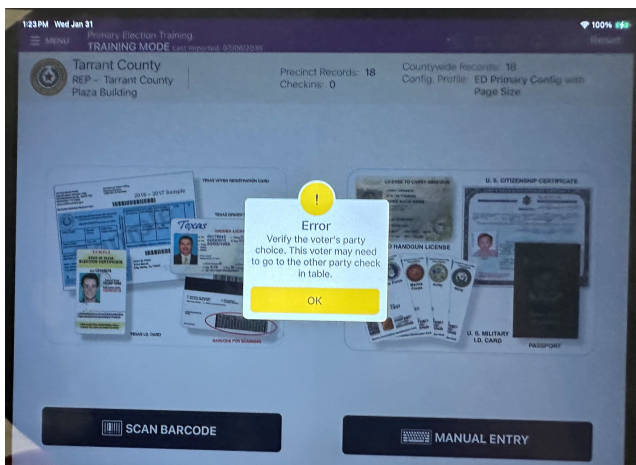
❶ PRIMARY - Early Voting

During Early Voting after checking in the voter and confirming their information, the voter must select their party choice, then press '**ACCEPT**.'

❷ PRIMARY - Election Day

On Election Day after looking up the voter's record by Scan Barcode or Manual Entry, the voter must select their party choice.

❸ PRIMARY - Election Day

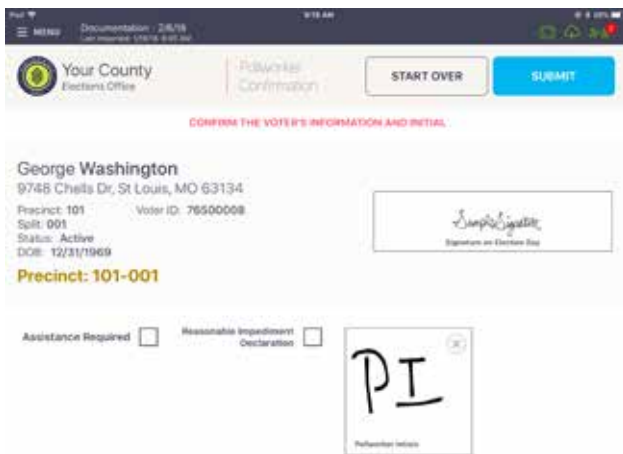If the voter is in the incorrect party's line, the Poll Pad will pop-up the following message.

ERROR
Verify the voter's party choice. This voter may need to go to the other party check in table.

④ VOTER SIGNATURE

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

⑤ POLL WORKER CONFIRMATION

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

⑥ PROCESSED VOTER

Good Job! You successfully processed the voter. Follow polling place protocol to direct voter to next polling station.
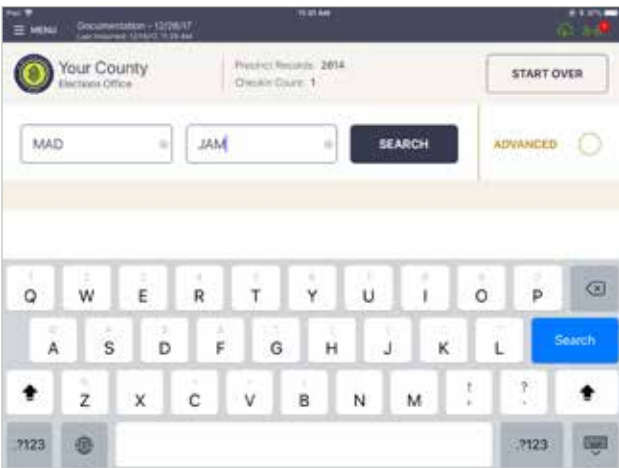
❶ WHY SEARCH BY NAME?

Since not every voter has a form of identification that can be scanned, you may have to locate the voter using his or her first and last name.
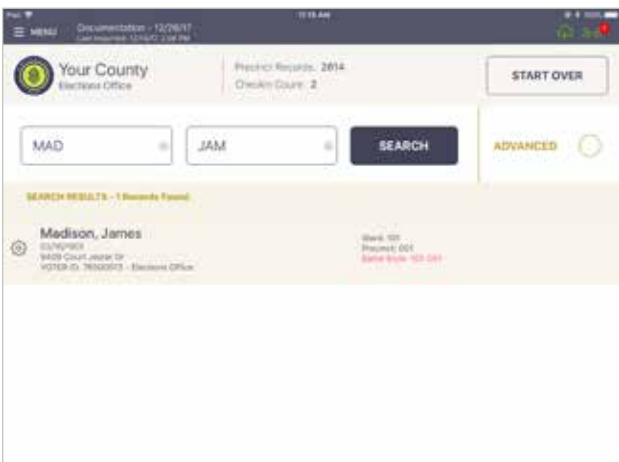

❷ ENTER VOTER'S NAME

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

❸ 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.

❹ IDENTIFICATION METHODS

Choose the appropriate Identification Method from the left.

Acceptable Photo ID: Texas Driver License, Texas Personal ID card, Texas Handgun License, Texas Election ID Certificate, US Military ID card w/ photo, US Passport, US citizenship/naturalization certificate w/ photo

Supporting ID: Government document with voter's name & address; including voter registration certificate, Bank statement, Government check, Paycheck or (a) certified domestic birth certificate or (b) document confirming birth admissible in court of law which establishes identity

❺ VOTER CONFIRMATION

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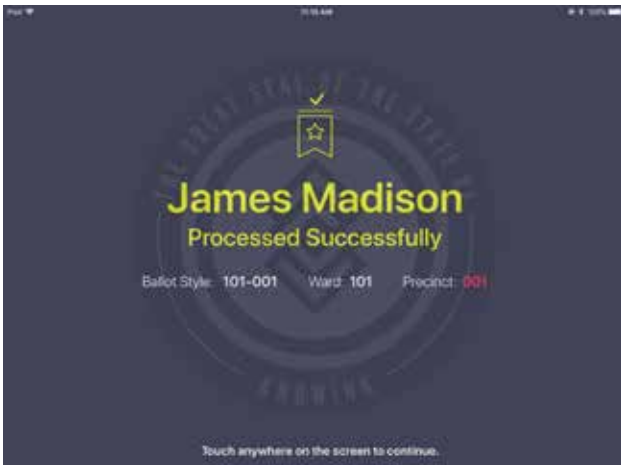Verify information, if all is correct press **ACCEPT**.

❻ VOTER SIGNATURE

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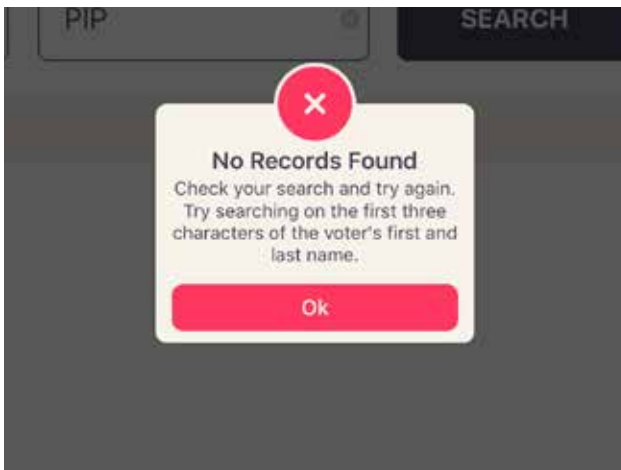
❼ POLL WORKER CONFIRMATION

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

❽ PROCESSED VOTER

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

❶ VOTER NOT FOUND

If Scan Barcode and Manual Entry have 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.

❷ ADVANCED SEARCH

Once back on the Voter Lookup Screen, press **ADVANCED**.

NOTE: Clear Name Fields by Pressing "X" in First and Last Name Boxes Before Searching.

❸ SEARCH BY:

Lookup voter 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 scan as barcode/manual entry to process voter.

❶ LOOK UP VOTER

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

If the voter's recorded name and the name on the ID are not the same, but are substantially similar, press "**Similar Name Affidavit**."

❷ AFFIDAVIT FOR SIMILAR NAME

Voter to read and confirm Affidavit for Similar Name. Voter must sign by the X, then press **CONTINUE**.
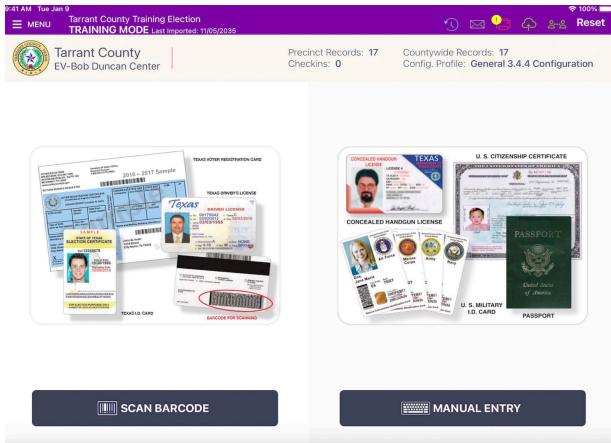
*Similar Name Correction Request Form must be filled out. Form is located in the 'Pollbook Documents Kit.'
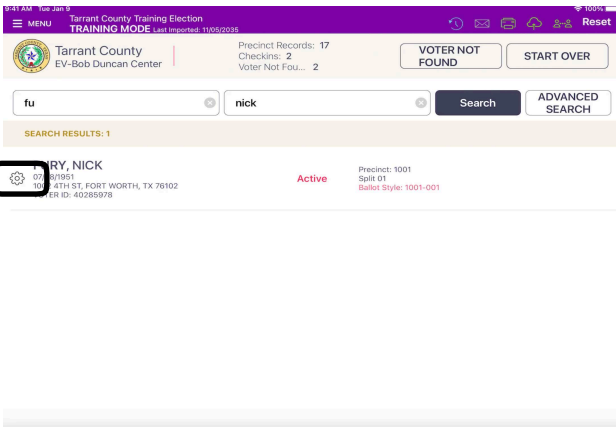

❸ CORRECT VOTER

Similar Name Affidavit will now be highlighted. Press **ACCEPT** to continue voter checkin.
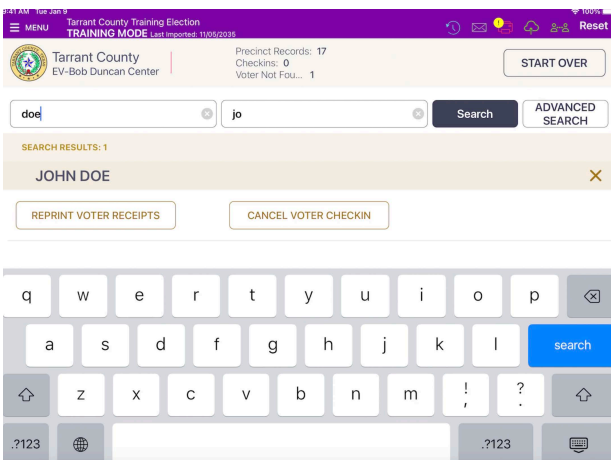
REPRINT VOTER RECEIPTS

Select **MANUAL ENTRY**

Enter voter's name, then press **SEARCH**

Press the settings wheel on the left hand side by the voters name.

Select **REPRINT VOTER RECEIPTS**.

Voter ticket and Controller barcode will reprint.

❶ LOOK UP VOTER

Lookup the voter's record using either Scan Barcode or Manual Entry instructions. Voter record will be highlighted red, with a voter status of **Absentee Sent**. Select voter record to proceed.

❷ ABSENTEE BALLOT MAILED

A pop-up with options will appear.
If criteria is met, select **Cast Regular Ballot**.

If criteria is not met, select **Cast Provisional Ballot**.

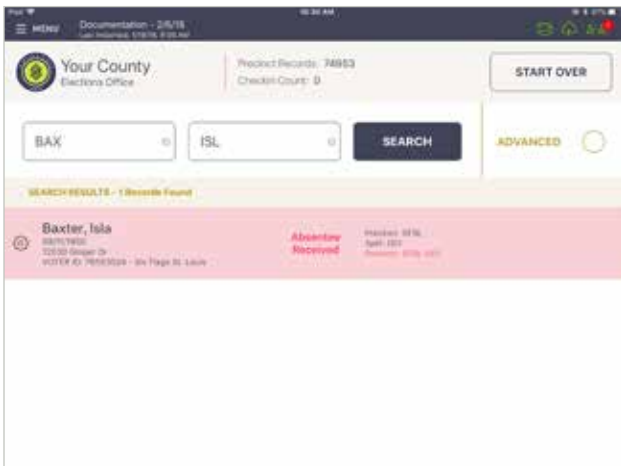*Request to Cancel Ballot by Mail form can be found in the Pollbook Documents Kit.

❸ FOLLOW PROMPT

After surrendering Absentee Ballot and providing a Request to Cancel ABBM Form, press **Yes**.

If there is no ballot to surrender, or a Request to Cancel ABBM Form is not provided, press **No**.
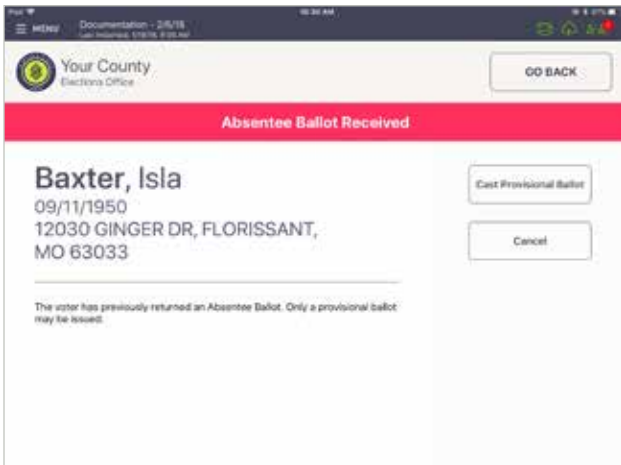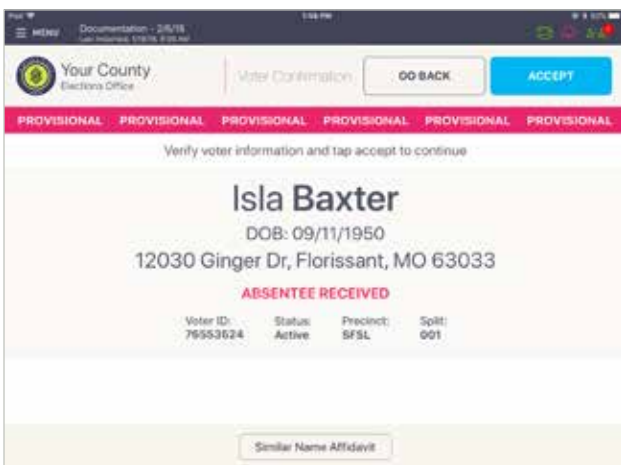
❶ LOOK UP VOTER

Lookup the voter's record using either Scan Barcode or Manual Entry instructions.
Voter record will be highlighted red, with a voter status of **Absentee Received**. Select voter record to proceed.

❷ CORRECT VOTER

A pop-up will appear.
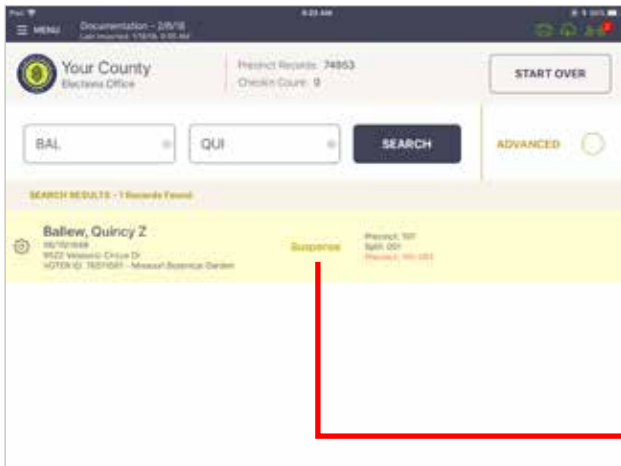If the voter chooses to cast a ballot, then select **Cast Provisional Ballot**.

❸ PROVISIONAL VOTER

Proceed to process voter as Provisional Voter.

❶ LOOK UP VOTER

Lookup the voter's record using either Scan Barcode or Manual Entry instructions. You'll notice their record contains a status that reads "Suspense." Select voter record to proceed.

❷ FOLLOW PROMPT

A prompt will appear reading, "**Address Confirmation**." Voter must fill out Statement of Residence form. When form is complete and voter provides proper identification, press **Cast Regular Ballot**.
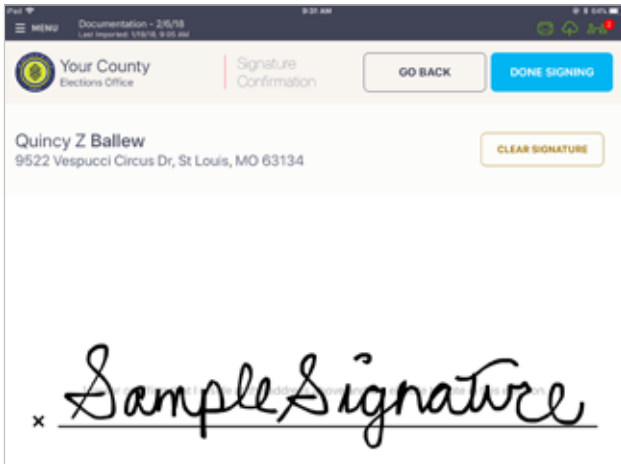
*Statement of Residence Form is located in the 'Pollbook Documents Kit.'

❸ VOTER CONFIRMATION
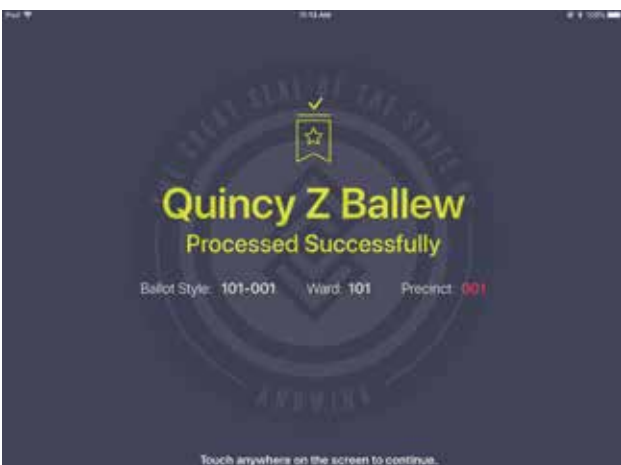
Screen displays voter's information. Press **ACCEPT**.

❹ VOTER SIGNATURE

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

❺ POLL WORKER CONFIRMATION

Poll worker confirmation page will appear. Poll worker to initial in provided field then press **SUBMIT**.

❻ PROCESSED VOTER

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

❶ LOOK UP VOTER

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

Poll worker to confirm all information on the screen. If voter fails to meet requirements to be processed he/she can vote provisionally, select **Process Provisionally.**

❷ PROCESS PROVISIONALLY

Select reason from drop-down MENU.

When finished, press **APPLY**.
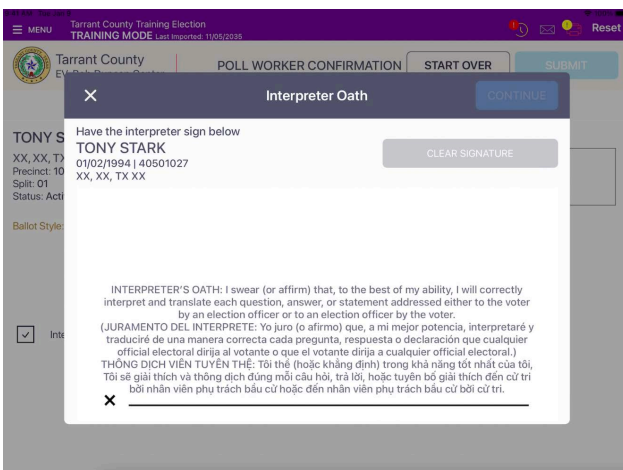
❸ POLL WORKER CONFIRMATION

A new screen will appear. Poll worker to confirm all information on the screen. If the voter record is correct, press **ACCEPT** to continue voter check-in.
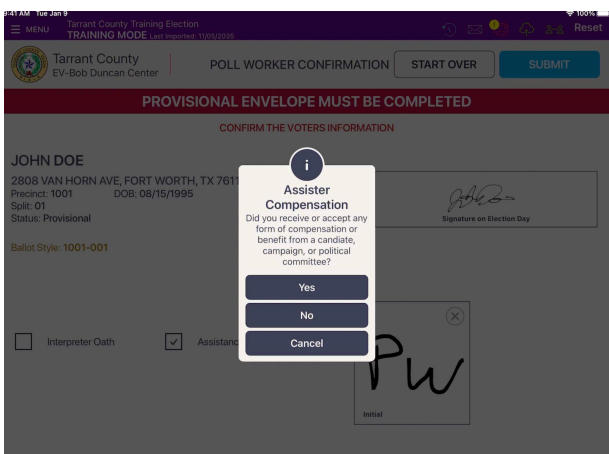
1 VOTER ASSISTANCE

If a voter requires an Interpreter or Assistance, check the applicable box which is found on the PollWorker Confirmation screen.

2 INTERPRETER

A pop-up will instruct the Interpreter to sign in the box below. Once signed poll worker presses **CONTINUE**. Poll worker then verifies voter's information. If all is correct, select **SUBMIT**.

3 ASSISTANCE

Assister Compensation
Did you receive or accept any form of compensation or benefit from a candidate, campaign, or political committee.
A pop-up will instruct poll worker to fill in the name, address and relationship to voter. Assistant reads oath aloud and signs their name. Poll worker initials and finishes processing voter.
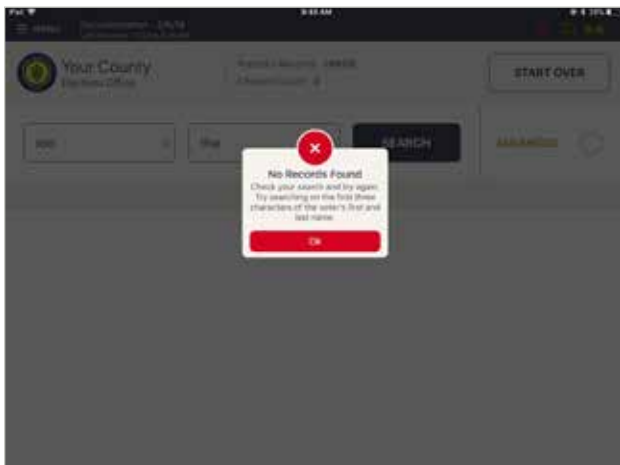
❶ LOOK UP VOTER

Lookup the voter's record using either the Search by Scan Barcode, Manual Entry or Advanced Search instructions.

❷ NO RECORD FOUND

If voter is not found, perform alternative searches using different fields, fewer letters in the name or alternate first name spellings (ex. Bob vs Robert).

❸ ADD VOTER

If voter is still not found select Menu and select Add Voter.

4 ENTER NAME AND DOB

If the voter presents a Texas driver's license, poll worker may scan the barcode to auto-populate the voter's name and date of birth. If not, manually enter voter's information and select **NEXT**.

NOTE: *Indicates a required field.

5 ENTER ADDRESS

Enter voter's residentialaddress (where voter resides). Enter voter's house number, voter's street, city, and zip code. To move from each box, press in the appropriate box. Select **NEXT**.
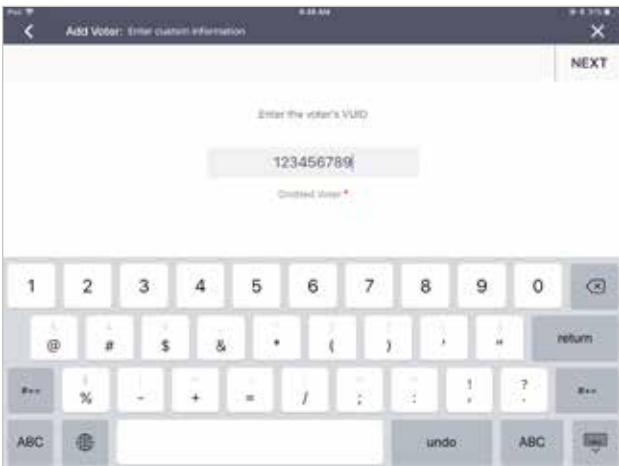

6 VOTER PRECINCT

Select the correct precinct and split number from the drop down menu. To move from each box after making a selection, tap on the next box.

7 VOTER ID NUMBER

Enter the existing Voter ID Number provided to you by election office, then Select Continue.

8 VOTER AFFIDAVIT

Voter to read and confirm Voter's Affidavit. Voter must sign by the X and rotate back to poll worker. Press **NEXT**.

9 AFFIDAVIT CONFIRMATION

Poll worker to confirm that all voter's information is correct, then select **NEXT**.

⑩ VOTER SUCCESSFULLY ADDED

Once information has been confirmed, you will receive a pop-up confirming you have added the voter. Press **Ok** to continue processing voter.
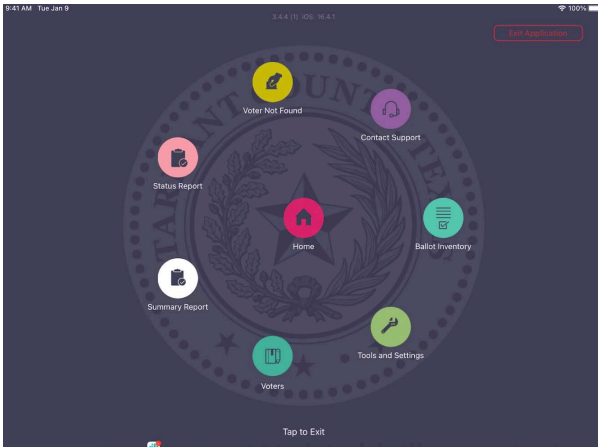

⑪ VOTER CONFIRMATION

You will be redirected to the Voter Confirmation page. Verify information is correct and press **ACCEPT** to continue check-in process.
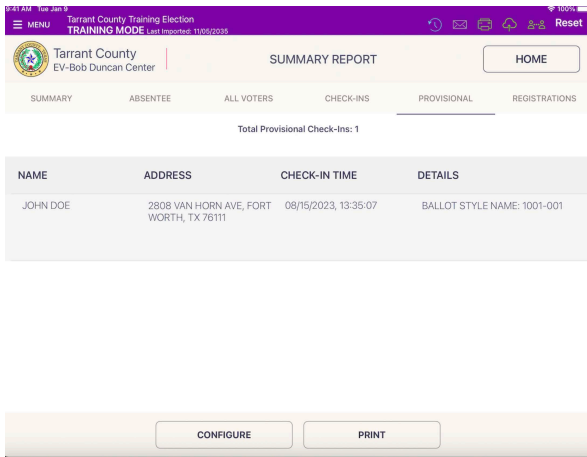
LOG OF PROVISIONAL VOTERS

Press Menu button on the top left hand side and Select **Summary Report**.
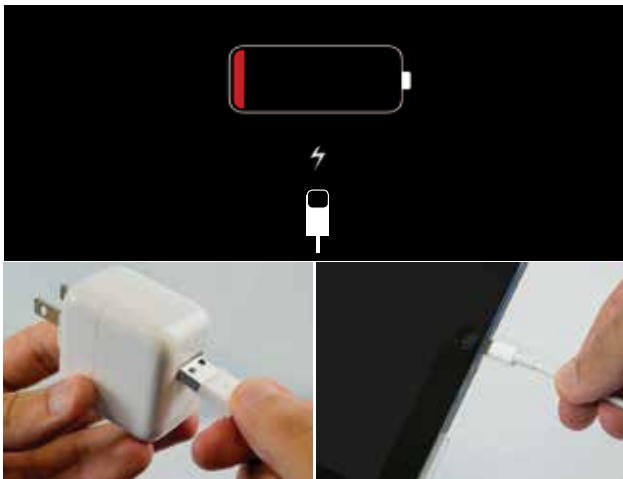

Select Provisional and press **PRINT**.

CLOSING POLL PAD

Press Cloud Icon and select Synchronize Now.
When syncing is done the button will become available again.
On the top left, press the Menu button
Then on the top right press Exit Application.
Exit application? Are you sure you wish to close PollPad?
Select Exit Application.
It is ready to be powered off.
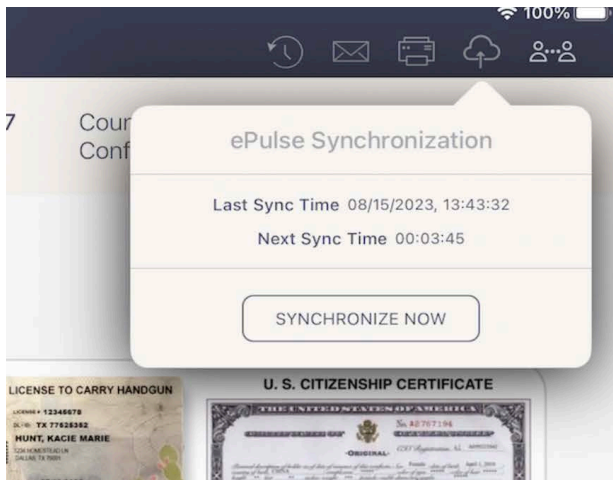
CHARGING POLL PAD

Plug USB end of power cable into power cube.

Plug power cube into an AC wall outlet.

Plug power cable into Lightning Connector on Poll Pad.

Wait about five minutes for the Poll Pad to charge.

Once there is sufficient power, Poll Pad will auto power on.

Resume normal operations.

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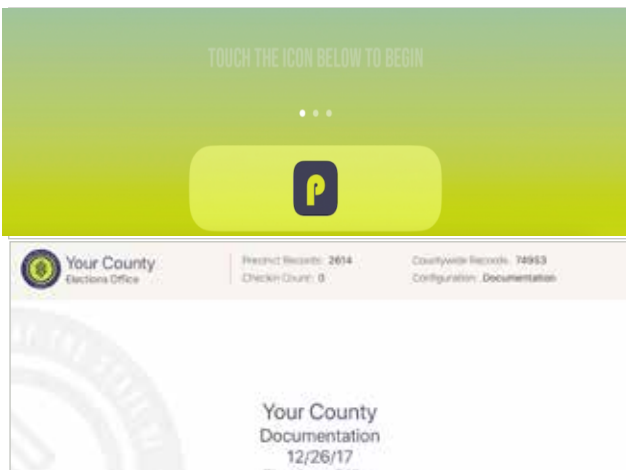
OPENING POLL PAD

If application does not automatically launch when powered on, touch the Poll Pad App at the bottom of the Home Screen.

Verify the Texas homepage displays on screen.
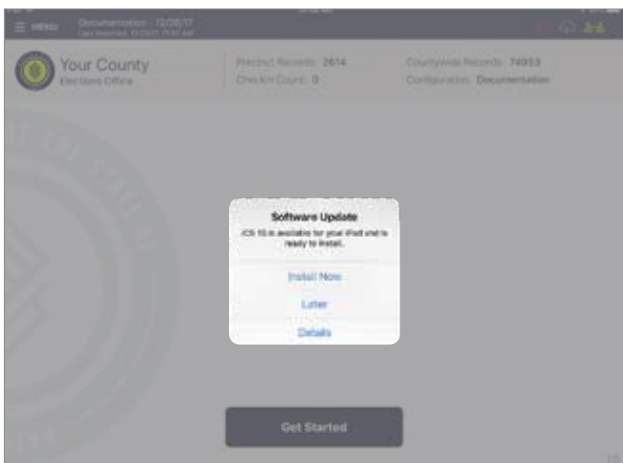
iOS SOFTWARE UPDATE

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:

Touch 'Later' from the list of on screen options.

Press the Home button and verify Poll Pad app remains open.

POLL PAD SCREEN IS UNRESPONSIVE

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

If the Poll Pad screen is unresponsive, perform the following steps:
Hold down the Sleep/Wake and Home buttons simultaneously (green and yellow sticker). Release both buttons once the Apple logo displays on screen. After application launches, return to previous activity.

NOT PRINTING / STOPS PRINTING

Green Printer Icon: Make sure the printer is turned ON.

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

Red Printer Icon: Check paper is installed correctly.

Confirm connection with Poll Pad (green icon).

CHANGING PAPER

Open printer.

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

Close and Print Test Receipt.