Agenda

- Section I – E-Pollbook Set-up
- Section II – Clocking-in on the E-Pollbook *(New)*
- Section III – Opening the E-Pollbook
- Section IV – Generating Wait Time
- Section V – Standard Voting Procedures
- Section VI – Exceptions to Standard Voting Procedures
- Section VII – Clocking-out on the E-Pollbook *(New)*
- Section VIII – E-Pollbook Closing
SECTION II

Clocking-in on the E-Pollbook
Clocking In on the E-Pollbook

• Searching for Poll Workers and Clocking In (New)

1. On the E-Pollbook, from the top of the Search for Voter screen, tap Options

2. From the pop-up menu, press Poll Worker Management
Clocking-in on the E-Pollbook

- Searching by Poll Place (New)
  1. Tap the **Find Poll Worker** button to search for a Poll Worker
  2. The initial screen defaults to **By Poll Place** which pre-populates a list of Poll Workers assigned to that specific polling location. Tap the first Poll Worker on the list
Clocking-in on the E-Pollbook

• Searching by Poll Place (New)

3. Turn the E-Pollbook towards the Poll Worker to verify basic information (Name, address, DOB, phone number, email) is correct

4. If Poll Workers information is incorrect, tap **Edit Poll Worker** and turn E-Pollbook back to Poll Worker to tap appropriate tabs to make corrections

5. Tap **Save**, the Poll Worker confirms information was updated and taps **Clock in**

6. The screen will show clocked in, tap **Ok**

7. The screen will return to **Poll Worker Management**
Clocking-in on the E-Pollbook

• Searching by County (New)

1. If a Poll Worker is not found By Poll Place, perform a search By County
2. Tap the Find Poll Worker button to search for a Poll Worker
   □ Search “DOE”
3. Tap the By County option on the screen. Input the first three initials of the last name and tap the Poll Worker which will be highlighted in yellow indicating Wrong Poll place
Clocking-in on the E-Pollbook

• Searching by County (New)

4. Confirm Poll Workers job title is correct, if not make appropriate corrections

5. Tap Poll Place option, automatically defaults to the new assigned poll place location and tap Next

6. Turn the E-Pollbook towards Poll Worker, instruct to read and sign the oath; Tap OK
Clocking-in on the E-Pollbook

- Searching by County (New)
7. Poll Worker verifies information is correct; Tap **Clock in**
8. Screen appears showing clocked in, Tap **OK**
9. The screen will return to **Poll Worker Management**
Clocking-in on the E-Pollbook

• Adding Poll Worker(s) (New)
  ▫ If unable to locate a Poll Worker By Poll Place or By County, Judge will need to be add them to the E-Pollbook.
  ▫ The Judge will give the Poll Worker a SSN Form to capture Poll Worker’s Social Security Number. Judge will proceed to add the Poll Worker to the E-Pollbook
  ▫ The SSN Form will be delivered to Vote Centers by Inspectors

1. To add a Poll Worker, Tap the Find Poll Worker button
Clocking-in on the E-Pollbook

- Adding Poll Worker(s) *(New)*
  2. Scroll to bottom of the search list and Tap **Add Poll Worker**

3. Judge turns the E-Pollbook towards Poll Worker for them to complete the fields on all 3 tabs and tap **Save**.
Clocking-in on the E-Pollbook

- Adding Poll Worker(s) (New)
  4. Screen appears showing the Poll Worker’s name has been added
  5. Judge records ID on Payroll Form and tap OK
     - Once completed, place the SSN Form inside the Yellow Folder
  6. Judge turns the E-Pollbook towards Poll Worker to read and sign the oath; Tap OK
Clocking-in on the E-Pollbook

- Adding Poll Worker(s) *(New)*
  7. Poll Worker verifies information is correct and tap **Clock In**
  8. Screen appears showing **Clocked In**, tap **OK**
  9. The screen will return to **Poll Worker Management**
SECTION IV

Generating Wait Time Procedures
Generating Wait Time

- Tap **Options**
- Tap **Wait Time**
- Tap **Generate Token** for a new token
- Write the four-digit number on the token card
- Give token card to last voter in line

### Wait Time Ticket Instructions

*Step 1: Presiding Judge* – On Election Day, at the times listed below, do the following:
- Tap Options on E-Pollbook
- Tap Wait Time
- Tap Generate Token
- Write the Wait Time Token Code next to the corresponding time below

<table>
<thead>
<tr>
<th>Time</th>
<th>Wait Time Token Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 am</td>
<td>8423</td>
</tr>
<tr>
<td>9:00 am</td>
<td></td>
</tr>
<tr>
<td>10:00 am</td>
<td></td>
</tr>
<tr>
<td>11:00 am</td>
<td></td>
</tr>
<tr>
<td>12:00 pm</td>
<td></td>
</tr>
<tr>
<td>1:00 pm</td>
<td></td>
</tr>
<tr>
<td>2:00 pm</td>
<td></td>
</tr>
<tr>
<td>3:00 pm</td>
<td></td>
</tr>
<tr>
<td>4:00 pm</td>
<td></td>
</tr>
<tr>
<td>5:00 pm</td>
<td></td>
</tr>
</tbody>
</table>

- Tap "X" in the right-hand corner of the screen
- If there is a line, give this ticket to the last voter in line
- If there is no line, proceed to **Step 3**

*Step 2: Clerk* – Collect this ticket from the voter when they check in at the E-Pollbook and give it to the Presiding Judge

*Step 3: Presiding Judge* – Immediately do the following:
- Tap Options on E-Pollbook
- Tap Wait Time
- Tap Enter Token
- Enter the last Wait Time Token Code listed above, tap the **button**
- Tap Next
- Tap Done

*Step 4: Presiding Judge at 7 pm –*
- Hand this ticket to the last voter in line
- Do not let anyone else check-in to vote after that voter has checked-in

*Step 5: Presiding Judge* – After the polls close, place this ticket in the Judge’s Notebook.
Entering a Wait Time Token

- Tap **Options**
- Tap **Wait Time**
- Tap **Enter Token**
  - If there is no active token, the Enter Token option is greyed out
- Enter the four-digit token number, tap **Next**
- Wait time is shown and tap **Done**
Canceling Wait Time

- Tap **Options**
- Tap **Wait Time**
- Tap **View Token**
- Current token number and time issue is shown
- Touch **Cancel Current**
- Confirm cancelation and tap **Yes**
Generating Wait Time

- New token can be generated from cancelation screen
  - Tap **Generate New**
  - Write the four-digit number on the token card
  - Give token card to last voter in line
SECTION V

Standard Voting Procedures
Standard Voting Procedures

1. Ask the voter if they have an ID from the list of acceptable forms of ID from List A
   - US Military ID
   - US Citizen Certificate
   - US Passport
   - Texas Driver License
   - Election ID Certificate
   - Personal ID Card
   - Handgun License
Standard Voting Procedures

2. Search for the voter
   • If Driver’s License was provided, scan the driver’s license using the built-in scanner under the screen.
   • If not, search for voter by name and/or birthdate using the touchscreen
Standard Voting Procedures

3. Review voter’s name against their ID
4. Ask voter to confirm their address
5. Tap the voter from the matching search results
Standard Voting Procedures

6. Tap **Yes** to indicate voter did present an ID from List A and then tap **Next**
Standard Voting Procedures

7. Record voter’s name on the Voter Roster

[Image] Voter Roster with voter name "Panther, Black" entered and corresponding section from the Texas Demo Election.
Standard Voting Procedures

8. Ask the Voter to choose their serialized ballot card

9. Insert blank ballot card into the ballot card printer
Standard Voting Procedures

10. Verify voter status is Active and Eligible

11. Tap **Issue Standard** button to issue ballot
Standard Voting Procedures

12. Check the “None” box and tap **Next**
Standard Voting Procedures

13. Turn the E-Pollbook to face the voter and instruct the voter to sign the declaration and tap **Done Signing**
   - Stylus provided
Standard Voting Procedures

14. Turn the E-Pollbook back and tap **Accept**
Standard Voting Procedures

15. Record Ballot Style on the Voter Roster
16. Tap **Complete Check-in**
   - The voter’s ballot will print from the ballot card printer
17. Hand voter their activated ballot card
18. Direct voter to the voting machine to mark their ballot
SECTION VI

Exceptions to Standard Voting Procedures
Exception 1 - Handled by a Clerk

- Voter's name on ID is different than name in E-Pollbook
  1. Ask voter for an acceptable form of ID
  2. Search for voter in E-Pollbook
  3. Review voter’s name against name on Voter ID

→ Voter’s name on ID does not match name displayed in E-Pollbook
Exception 1 - Handled by Clerk

Voter's name on ID is different than name in E-Pollbook

4. Determine if voter’s name is substantially similar to the name listed in the E-Pollbook.
   - A name is considered substantially similar if the name in the E-Pollbook is:
     - Slightly different than name on ID
     - A customary variation or nickname of the name on ID
     - Initial, middle, or former name
     - Displayed in a different order than on ID
     - If name does not meet the above criteria, direct voter to the Judge’s table
Exception 1 - Handled by Clerk

- Voter's name on ID is different than name in E-Pollbook

5. Ask voter to confirm their address

6. Tap the voter from the matching search results

7. Tap **Yes** to indicate voter did present an ID from List A and then tap **Next**
Exception 1 - Handled by Clerk

- Voter's name on ID is different than name in E-Pollbook
  8. Record voter’s name from the E-Pollbook onto the Voter Roster
Exception 1 - Handled by Clerk

• Voter's name on ID is different than name in E-Pollbook

9. Ask the Voter to choose their serialized ballot card
10. Insert blank ballot card into the ballot card printer
11. Verify voter status is Active and Eligible
12. Tap Issue Standard button to issue ballot
Exception 1 - Handled by Clerk

- Voter's name on ID is different than name in E-Pollbook

13. Check the “Similar Name Affidavit” box and tap **Next**
Exception 1 - Handled by Clerk

- Voter's name on ID is different than name in E-Pollbook

14. Direct voter to read and initial “Similar Name Affidavit” and tap Next
Exception 1 - Handled by Clerk

• Voter's name on ID is different than name in E-Pollbook

15. Ask voter if they would like to update their name in their voter registration record
• Tap either Yes or No
• Updating voter’s name is optional and does not impact their ability to vote
Exception 1 - Handled by Clerk

- Voter's name on ID is different than name in E-Pollbook
  - If No, continue standard voting procedures
  - If Yes, instruct voter to enter name on the Update Voter’s Name screen and tap OK. Continue standard voting procedures
Exception 1 - Handled by Clerk

- Voter's name on ID is different than name in E-Pollbook

16. Have the voter sign the E-Pollbook and tap **Done Signing**
17. Turn back around and tap **Accept**
18. Record the Voter’s ballot style onto the Voter Roster
19. Tap **Complete Check In**
20. Hand voter their activated ballot card and direct to the voting machine
Exception 2 - Handled by Clerk

- Voter with confidential address

  1. Ask voter for an acceptable form of ID
  2. Search for voter in E-Pollbook
  3. Review voter’s name against name on Voter ID

  ➔ Voter’s address field is blank and status displays “Privacy Eligible”

  Do not ask voter to verify address on file
Exception 2 -Handled by Clerk

- Voter with confidential address

4. Tap the voter from the matching search results
5. Tap Yes to indicate voter did present an ID from List A and then tap Next
6. Record voter’s name on the Voter Roster
7. Ask the Voter to choose their serialized ballot card
8. Insert blank ballot card into the ballot card printer
9. Verify voter status is Active and Eligible
Exception 2 - Handled by Clerk

- Voter with confidential address

10. Tap **Issue Standard** button to issue ballot.

11. Check the “None” box and tap **Next**

12. Have the voter sign the E-Pollbook and tap **Done Signing**

13. Turn back around and tap **Accept**

14. Record the Voter’s ballot style onto the Voter Roster

15. Tap **Complete Check In**

16. Hand voter their activated ballot card and direct to the voting machine
Exception 3 - Handled by Clerk

- Voter with language barriers
  
  ➔ Voter approaches Check-in table with an interpreter

1. Ask voter for an acceptable form of ID
2. Search for voter in E-Pollbook
3. Review voter’s name against name on Voter ID
4. Ask voter to confirm their address
5. Tap the voter from the matching search results
Exception 3 - Handled by Clerk

- Voter with language barriers

6. Tap Yes to indicate voter did present an ID from List A and then tap Next
7. Record voter’s name on the Voter Roster
8. Ask the Voter to choose their serialized ballot card
9. Insert blank ballot card into the ballot card printer
10. Verify voter status is Active and Eligible
11. Tap Issue Standard button to issue ballot
Exception 3 - Handled by Clerk

- Voter with language barriers

12. *(New)* Check the “Voter Assistant” and “Voter Interpreter” box and tap Next
Exception 3 - Handled by Clerk

- Voter with language barriers

13. (New) Using the **Oath of Assistance Form**, administer the Oath out loud and have the Interpreter repeat after you

14. (New) Interpreter will complete the **Oath of Assistance Form**

15. (New) Tap **Enter Here** on the E-Pollbook and the Interpreter provides personal information and tap **Ok**

16. (New) Instruct interpreter to sign the Oath
Exception 3 - Handled by Clerk

- Voter with language barriers

17. (New) Using the E-Pollbook administer the Interpreter Oath out loud and have the Interpreter repeat after you

18. Have the Interpreter sign on the E-Pollbook and tap **Done Signing**

19. Interpreter will sign the **Oath of Interpreter** Form
Exception 3 - Handled by Clerk

- Voter with language barriers

20. Have the voter sign the E-Pollbook and tap **Done Signing**
21. Turn back around and tap **Accept**
22. Record the Voter’s ballot style onto the Voter Roster
23. Tap **Complete Check In**
24. Hand voter their activated ballot card and direct to the voting machine
Exception 4 - Handled by Clerk

- Voter with disabilities
  - Voter with a disability approaches Check-in table with an assistant
  1. Ask voter for an acceptable form of ID
  2. Search for voter in E-Pollbook
  3. Review voter’s name against name on Voter ID
  4. Ask voter to confirm their address
  5. Tap the voter from the matching search results
Exception 4 - Handled by Clerk

- Voter with disabilities

6. Tap **Yes** to indicate voter did present an ID from List A and then tap **Next**

7. Record voter’s name on the Voter Roster

8. Ask the Voter to choose their serialized ballot card

9. Insert blank ballot card into the ballot card printer

10. Verify voter status is Active and Eligible

11. Tap **Issue Standard** button to issue ballot
Exception 4 - Handled by Clerk

- Voter with disabilities

12. Check the “Voter Assistance” box and tap **Next**
Exception 4 - Handled by Clerk

- Voter with disabilities

13. **(NEW)** Administer the Oath of Assistance out loud and have the Assistant repeat after you

14. Instruct the assistant to tap **Enter Here** to provide personal information
Exception 4 - Handled by Clerk

• Voter with disabilities

15. Instruct assistant to enter name and address in the fields shown and tap OK
Exception 4 - Handled by Clerk

- Voter with disabilities

16. Instruct assistant to sign Oath and tap **Next**
Exception 4 - Handled by Clerk

- Voter with disabilities

17. (NEW) Administer the **Oath of Assistance** to the assistant and complete the form

18. Have the voter sign the E-Pollbook and tap **Done Signing**

19. Turn back around and tap **Accept**

20. Record the Voter’s ballot style onto the Voter Roster

21. Tap **Complete Check In**

22. Hand voter their activated ballot card and direct to the voting machine
   - Accessible voting machine available
Exception 8 - Handled by Judge

- Voter has been mailed a ballot

1. Collect the voter's ballot and envelope
2. Hand the voter a Request to Cancel Ballot by Mail form, and have them complete the section marked 84.032(b) and 84.032(d)
3. Write “Cancel” on voter’s surrendered ballot
4. Once form is complete, attach form to the surrendered ballot
5. Place surrendered ballot into the Blue Carrier Envelope for Election Day and Early Voting
6. Tap Manage Voter at the top right of the E-Pollbook
7. Enter the Supervisor password from the Access Code Sheet located in the Judge’s Notebook
8. Tap Cancel Ballot, then Tap Cancel Ballot again
9. Tap Issue Standard
10. Tap Issue Standard

→ Continue the Standard Voting Process
Exception 11 - Handled by Judge

- Voter not found in the E-Pollbook
  1. Contact the Judge’s Hotline and ask them to research voter’s eligibility
  2. Provide voter’s information (name, DOB, current address)
  3. If the voter is registered in Dallas, Voter Registration will help you find the voter and continue the Standard Voting Process
  4. If the voter is not registered but lives within Dallas county, ask voter registration for the voter’s precinct number
  5. Tap **Voter not found** on the E-Pollbook
  6. Enter the voter's details and Tap Next
  7. Inform the voter they will have to vote a Provisional Ballot

→ **Continue the Provisional Process**
Exception 14 - Handled by Judge

- Voter issued a mail ballot and cannot surrender

1. Locate and tap on the voter in the E-Pollbook
2. Hand voter a Request to Cancel Ballot by Mail form and have them complete the section marked 84.032(b) and 63.011(a-1)
Exception 14 - Handled by Judge

• Voter issued a mail ballot and cannot surrender

3. Once voter has completed the two sections, the Judge must complete This section to be completed by Election Official

4. Once the Request to Cancel Ballot by Mail form is complete, place form in the Blue Carrier Envelope for Election and Early Voting

5. Inform the voter they will vote provisionally

→ Continue with the Provisional Process
Exception 16 - Handled by Judge

• Canceling and reissuing a ballot

1. Locate and tap on the voter in the E-Pollbook
2. Tap Manage Voter at the top right of E-Pollbook
3. Enter the Supervisor password from the Access Code sheet located in the Judge’s Notebook
4. Tap Cancel Ballot, Tap Cancel Ballot again
5. Fill out the Register of Spoiled Ballots form with voter’s ballot information
SECTION VII

Clocking Out on the E-Pollbook
Clocking Out on the E-Pollbook

- Searching for Poll Workers and Clocking Out (New)
  1. On the E-Pollbook, from the top of the Search for Voter screen, tap Options
  2. From the pop-up menu, press Poll Worker Management
Clocking Out Poll Workers (New)

1. Start from the Poll Worker Management screen, tap Find Poll Worker
2. When a Poll Worker is clocked in, their information appears in red
3. Tap on the Poll Worker who is clocking out
Clocking Out on the E-Pollbook

- Clocking Out Poll Workers (New)

4. Judge turns the E-Pollbook towards the Poll Worker, the Poll Worker taps **Clock Out** on the screen

5. Poll Worker will tap the **clock out reason** and tap Next
   - On Election Day, Poll Workers will only clock out if they are Changing Locations or Going Home
Clocking Out on the E-Pollbook

• Clocking Out Poll Workers (New)

6. The screen will appear showing clocked out, tap OK

7. The screen will return to Poll Worker Management
Clocking Out on the E-Pollbook

- Time Card Approval (New)
  1. From the Poll Worker Management screen, Judge taps **Time Card**
  2. Once the Judge has confirmed everyone has clocked out (names in green), tap the **Approve** button from the bottom right of the screen
Clocking Out on the E-Pollbook

• Time Card Approval (New)

3. The **Time Cards Approval** page will appear; Judge sign and tap the **Approve** button from the bottom right of the screen to complete approval process

4. The “**Time Cards have been Approved**” screen will be displayed; tap **OK**
Clocking Out on the E-Pollbook

• Time Card Approval (New)

5. The screen will return to Poll Worker Management screen

6. To confirm that all time cards have been approved, from the Poll Worker Management screen tap **Time Card**

7. The **Approve** button will be greyed out; all Poll Workers will show green and reflect clocked out
SECTION VIII

E-Pollbook Closing
E-Pollbook Closing

• Judge directs activity using “Closing the E-Pollbook Checklist”

• Judge will retrieve numbers from the E-Pollbooks to complete Early Voting Daily Report

• Poll Workers assist with packing up E-Pollbooks

  1. Tap Monitor Polls from the Search for Voter screen

  2. Tap on Close Poll

  3. Tap Yes to shut down the device

  4. From the Launch screen, Tap Shut Down
E-Pollbook Closing

• Poll Workers assist with packing up E-Pollbooks (cont’d):

  5. Unplug all cords from the E-Pollbook and place them back in the blue case
  6. Place the E-Pollbook back in case
      • Bottom of E-Pollbook facing Ballot Card Printer
  7. Unplug all cords from the ballot card printer place in the blue case
  8. Place Ballot Card Printer in blue case
      • Judge will return E-Pollbooks to Regional Site