Polling Place Operations
Module 1

Getting Started
This course provides poll workers with an overview of the Verity system, the benefits of using Verity, and Polling Place Operations.

In this course, Trainees will learn to successfully:

- Set up the voting equipment
- Open polls
- Instruct and assist voters
- Suspend/Close polls
**Usability** – Verity makes election administration and voting easier, by providing user-friendly tools that reduce complexity and streamline productivity.

- Modern, intuitive, friendly software design, across the entire suite
- Innovative hardware that is easy to store, transport, set up and operate.
- Usable, plain language ballot design and reporting.
Adaptability – Verity is designed to support any kind of election (in-person voting, by-mail voting, convenience voting etc.), and to be flexible enough to change as your needs change.

- Election management (Verity Election Office) + voting system (Verity Voting) is a unique “ecosystem” approach that can respond to legislative changes and support new apps over the long term.
- Modular parts allow Hart to convert Verity devices from electronic to paper and back, as your jurisdiction’s needs evolve.
**Transparency** – Verity provides for open, secure and easily auditable elections.

- Store images from Verity Scan scanning devices.
- Robust filters to print and export ballot images from Verity Central, with adjudication notes, if desired.
- Built-in Auditing Dashboard in Verity Count, to export Cast Vote Record data according to your specific, customized desires.
- Usable, easy-to-read plain language audit reports from every software application.
- Easy, efficient methods to validate software on voting devices and desktop workstations.
Verity system overview

1. Layout
2. Build
3. Ballots
4. Scanner
5. vDrive
6. Polling Place
7. Touch Writer
8. Ballots
9. Scan
10. Central
11. vDrive
12. Count
Using Verity Touch Writer, voters mark digital ballots via a touch screen. After the voter has confirmed their selections, the marked ballot prints. The voter then retrieves and casts their ballot.
Verity Touch Writer is compatible with **Verity Access**, which provides the following voter input options (in addition to the touch screen): buttons with scrolling wheel, headphones, and tactile button or sip-and-puff devices. The Verity Access can be docked within the Verity Touch Writer or held in hand.
Verity Scan is a polling-place-based digital scanner for voted ballots. It can be used with manually marked ballots or those printed via the Verity Touch Writer. If a voter marks contests incorrectly on their ballot, Verity Scan gives the voter the opportunity to check and/or correct their ballot before casting. Verity scan deposits scanned paper ballots into its secure ballot box for locked storage.
In the Verity system, **vDrives** are used to transfer ballots from software to device for voting, and to transfer voted ballots to software for tabulation.

vDrives also carry the audit log for their associated device to ensure voting remains fair.
Verity Key is a small security device that is programmed for each election. Verity Key is inserted into a USB port.

Verity Key is part of Verity’s two-factor authentication process. Two-factor authentication requires each user to have something (a programmed Verity Key) and to know something (the passcode associated with the Verity Key). Both the user passcode and the Verity Key must be authenticated together. Certain operations within the Verity Voting system require the Verity Key to be inserted and the passcode to be entered. Only when the Verity system authenticates the Verity key and password will it allow the operation to continue. If Verity fails to authenticate a Verity Key or password, the Verity Key may not have been programmed properly for the current election.
Verity Security Features

- Verity Voting utilizes the AAA (authentication, authorization, and audit) security framework.
- All Verity software has been tested by an independent voting system test lab and the Election Assistance Commission to ensure proper security.
- Verity uses a multi-layered authentication process.
- Verity software is tamper evident.
- Comprehensive audit logs are generated for all login attempts, data transfers, configuration changes, and errors. Logs are stored redundantly and securely.
- Vote records are stored redundantly for security and auditability.
- The integrity of the data is protected from power outage, power surge, magnets, and rough handling.
Module 2

Polling Place Planning
Checking Supplies

- Create and maintain a hardware and supplies checklist for all polling place devices and hardware. Follow the Polling Place Layout plan for quantities.

  - Voting Device(s)
  - Printer(s) (if applicable)
  - Headphones
  - Tactile Input Button Devices
  - Power supplies and extension cords
  - Ballot Box(es) and Booth(s)
  - Tables and Chairs
Checking Supplies

• Create and maintain a checklist for all polling place paperwork, including signage

  ❑ Polling Place Layout plan/Traffic Control plan
  ❑ Sample Ballots
  ❑ Instruction flyers, placards, etc.
  ❑ Logs and Envelopes
  ❑ Preprinted paper ballots and pens in the event of an extended power loss
  ❑ Paper for ballot printers
  ❑ Paper rolls for thermal printers
Contingency Plans

• Be familiar with proper emergency procedures:
  - Power loss
  - Weather related or other disasters
  - Review chain of custody procedures
Module 3

Setting up the Polling Place
Set Up Steps

• Plan the polling place layout

• Check supplies

• Set up the Verity Touch Writer(s) and power on

• Set up the Verity Scan and power on
setting up the polling place

Setting up Booths

1. Attach leg extensions and lock into place
2. Lift up booth so it is standing on its legs
3. Unfold booth so that it stands on its own
4. After Voting Device is installed, attach privacy screens.
Setting up Verity Touch Writer

1 Set Touch Writer on top of booth, aligning footpads with the indentations

2 Reach under back of booth top and pull latch to lock in place
3 Open case and lock lid brace in place
setting up Verity Touch Writer, cont.

4 Unlock
5 Open latch
6 Remove tablet from storage compartment
7 Seat tablet in cradle and tilt back
8 Lock in place
setting up Verity Touch Writer, cont.

9 Open storage compartment and remove headphones, power cord & power brick.
10 Plug power cord into power brick.
11 Plug power brick into back of Touch Writer and plug power cord into outlet.
Powering On

Power on the Touch Writer by pressing the green power button on the back of the device.
12 Place ballot printer on a table near the Touch Writer.

13 Insert the printer power cord into the printer and the other end into an outlet or UPS.

14 Insert the square end of the USB cable to the back of the Touch Writer and the other end into the printer.

15 Load the ballot printer with appropriate ballot paper

16 Attach privacy screens to the booth by inserting each screen into the notches on the sides of the booth top.
Setting up the Ballot Box

1. Position the folded ballot box as shown.
2. Unlatch the four clips (2 on each side).
3. Pull open the ballot box.
4 Press side panels outward until they are flat.

5 Lower the bottom panel but do not press down.
6 Release top panel by unhooking the 3 straps

7 Pull up on the string to unlock
8 Lift top panel while gently pulling outward, lay across the top of ballot box, and then press it onto the top.
9 Unlock front door with key.
10 Press firmly on bottom panel to lock in place, then close and lock front door.
Setting up Verity Scan

1. Set Scan on top of ballot box, aligning footpads with the indentations.

2. Reach inside ballot box and pull latch to lock in place.
Remaining steps are the same as for the Verity Touch Writer.
3 Open case and lock lid brace in place
4 Unlock
5 Open latch
6 Remove tablet from storage compartment
setting up Verity Scan, cont.

7 Seat tablet in cradle and tilt back

8 Lock in place
setting up Verity Scan, cont.

9 Open storage compartment and remove headphones, power cord & power brick.
10 Plug power cord into power brick.
11 Plug power brick into back of Scan and plug power cord into outlet.
Powering On

Power on the Scan by pressing the green power button on the back of the device.
Exercise 2.1

Set up Touch Writer with Access and Scan equipment and power on.
Module 4

Device Orientation
Screen Orientation

When powered up, the Voting Devices should display the Enter Maintenance Code screen.
Public and Lifetime Count

Ballots (Public Count)
• This is the number of ballots read on the device for the current election
• At the start of Election Day, or the start of the first day of Early Voting, this number should be zero

Lifetime Count
• This is the number of ballots cast on the device for the lifetime of the device (for all elections)
• This number will vary
AC and Battery Power Indicators

AC power and Battery Power Indicators are displayed on the screen as shown. All devices must have access to both AC power and Battery power.
Poll Worker Button

The Poll Worker Button is located on the back of the Voting Device (Touch Writer or Scan). This button is used for certain actions, such as printing reports, and issuing access codes on the Touch Writer.
Thermal Printer Operation

1 The Thermal Printer is located on the right-hand side of the Voting Device (Touch Writer or Scan).

2 To open the paper compartment: While standing in front of the device, pull the lever on the top of the printer cover towards you.
3 To replace paper: Place the new paper roll into the printer as shown.

4 Close the printer cover. The paper must extend out from underneath the front edge of the cover. The white button can be used to advance the paper.
Entering Passwords

- Passwords can be entered via the Device touch screen, or using the Move Wheel and Select Button on the Access device (if available).

- Passwords must be 6 digits long, and are determined by your local authorities prior to the election.
Module 5

Start of Day Procedures
Enter code

When powered up, the Voting Devices should display the Enter Maintenance Code screen.
Printing the Zero Report

- Tap **Print Zero Report** on the Device touchscreen to print the Zero Report.
- The Zero Report must be printed immediately before Opening Polls.
- This report verifies that no votes have been cast on the device for the current election. It should also be used to verify the precinct(s) and polling place are correct.
- File this report as per your local jurisdiction guidelines.
To Open Polls:

- Setup and power on all devices
- Enter the maintenance code on the devices, then tap Accept. Wait for the election to load.
- When available, tap Print Zero Report.
- Verify the ballot count total and enter it in the Reconciliation Log.
- Verify the precinct(s) and polling place is correct.
To Open Polls, continued:

- Verify the device clock is displaying the correct time.
- Tap Open the Polls
- Enter the Open Polls password, then tap Accept. The Open Polls Report will print.
- File the Zero Report and Open Polls Report as per local guidelines.
When Verity Touch Writer screen displays Begin Voting, or (if multiple languages are available) Vote in [Language], the device is ready to be voted.

Enter Access Code

Enter your access code

Enter your access code using the numeric buttons. Then touch "Accept" to activate your ballot.

If you do not have an access code, contact a poll worker.
Verity Scan

When Verity Scan screen displays Insert Ballot, the device is ready to scan ballots.
Module 5

Working with Voters
Best Practices for Assisting Voters and Vote Privacy

- No person other than a voter, a person assisting a voter, or a poll worker should enter the voting area.
- Voters should not be allowed to enter the voting booth area until a booth is open and available for use and they have been given an access code.
- If assisting a voter, stand beside the privacy screen to maintain voter privacy.
- Ask the voter how you can be of assistance.
- Ask appropriate questions to learn what part of the voting process the voter needs help with (for example, ‘What screen is visible?’)
- Always ask for the voter’s explicit permission before seeing the ballot, screen, or touching the voter’s voting device.
Best Practices for Issuing Access Codes & ballots

- In order to prevent Access Codes or paper ballots from being misplaced or fraudulently passed to others, voters should not stand in line with Access Codes or ballots.

- Before issuing an Access Code or a ballot, ensure that the voter has been properly qualified and is entitled to vote.

- In all instances where a voter could potentially be re-issued a new Access Code or ballot, be sure that the voter has been properly qualified and follow state and local procedures governing the re-issuance of ballots.

- Access codes will expire after an interval determined by the election officials.
Help button & Features

The **Help** Button is located at the top right of the device screen. This button takes the voter to a screen with help topics for the voting step currently underway.

1. **Mark your choices**
   - To mark a choice touch the choice. A checkmark will appear.
   - To remove a mark touch the choice again.
   - To go to the next contest touch "Next."

2. **Review your ballot**
   - To review your choices touch "Review your choices."
   - You may do this at any time.

3. **Print your ballot**
   - To print your ballot touch "Print" on the review screen.
   - Then retrieve your ballot from the printer.

You can get more help from a poll worker at any time.
The **Language** Button is located at the top left of the device screen. This button allows the voter to change the language of the instructions and ballot (if multiple languages are available).
The **Audio** Button is located at the top center left of the device screen. This button allows the voter to change the Audio settings (volume, speed, and pitch).
The **Screen Button** is located at the top center right of the device screen. This button lets the voter change the screen settings (contrast and text size) and to turn off the screen (if using headphones only).
Assisting Persons with Disabilities

Put People First!

• Put the person before the disability
• Labels do not define people

Awareness, Respect, Acceptance

• Persons with disabilities are individuals
• Neither tragic victims, nor superhuman
• Respect and acceptance, not pity or charity
Assisting Persons with Disabilities

Verity Access

- Allows voters with disabilities to vote privately and independently.
- Includes headphones for voters with visual impairments
- Supports Tactile Input Switches
- Supports Sip and Puff devices
- Navigate through a ballot with the Move wheel
- Make selections on a ballot with the Select button
- Request poll worker assistance with the Help button
Assisting Persons with Disabilities

- Headphones can be plugged into the top left side of the Verity Access
- Tactile Switches or Sip-and-Puff devices can be plugged into the top right side
Module 7

Voting with Verity Touch Writer
Adding Voters: Verity Touch Writer

- Press the blue Poll Worker button on the back of the device to bring up the Poll Worker Tasks menu
- Enter the Poll Worker password on the screen and tap Accept
- Tap Create voter access code
- Choose the correct precinct from the list and tap OK
- Tap Yes, print the code
- Hand the printed Access Code to the voter
- Allow them to enter the code and begin voting.
Adding Voters: Verity Touch Writer

Selecting Precinct

Printing Access Code
Deactivating an Access Code

• Push the blue poll worker button at the back of the device
• Tap Deactivate an access code
• Will give current status of the access code
Deactivating an Access Code

- Enter the access code using the keypad and tap Accept.
Select Language

If multiple languages are available, the voter will be presented with this screen before they enter their Access Code.

The voter will choose the language for the device instructions and ballot.
Enter Access Code

The voter can enter the access code using the touch screen, or using the Select button and Move wheel on the Access device (if available).
Begin Voting

After choosing their Language preference (if applicable) and entering their Access Code, the voter will start on the Begin Voting screen. From here, they can start voting (by tapping Begin Voting), learn how to use the ballot, or view a list of contests on the ballot. The Language, Audio, and Screen settings and the Help button are also available.
Make Selections

The voter can make ballot selections using the touch screen, or using the Select button and Move wheel on the Access device (if available).
Review Choices

The voter can review choices by tapping the Review Choices button.

They can then return to the ballot to make changes or print their final ballot.
Print Ballot

- After reviewing and confirming their choices, the voter will choose **Print Ballot**
- The voter retrieves the printed ballot from the laser printer next to their device
- The voter slips the ballot into the ballot privacy sleeve (if available)
- The voter takes the printed ballot to the Verity Scan device to cast their ballot
Write-in voting
Processing Blank Ballots

- If the voter has marked *no* choices and taps the Print button, Verity Touch Writer will ask the voter to confirm before printing the ballot.
Spoiling a Ballot

- The Spoil Current Ballot menu allows you to spoil (discard) the current ballot. This report is available on the main poll worker tasks screen.
- Press the blue poll worker button on the back of the device.
- Tap Spoil Ballot, then Tap OK.
Printing Reports

• While polls are open, you can print an access code report at any time. This report lists the number of access codes issued and number of ballots printed. It is available on the main poll worker tasks screen.

• Other reports are available only after closing polls.

⚠️ DO NOT CLOSE POLLS EARLY
Module 8

Hand-marked ballots
Issuing and voting hand-marked ballots

• Poll workers will qualify the voter and give them the correct ballot for their precinct.
• Voter must use blue or black pen to mark ballot choices.
• Make only the allowable number of marks for a given contest.
• Write-in candidates: the box to the left of the words “Write-In” must be filled completely, and the write-in candidate’s name printed on the adjacent line.
Voting with Scan

Module 9
• When the Insert Ballot screen appears, ballots can be scanned.
Verity Scan

• Ballots must be fed into the Verity Scan short edge first, but otherwise can be inserted in any orientation
Voting checklist: Verity Scan
(Ballot printed from Touch Writer)

- After voting on the Verity Touch Writer and printing their ballot, voter slips the marked ballot into the provided privacy sleeve (if applicable)
- Voter inserts the voted ballot into the Verity Scan and follow scanner screen directions to cast your ballot.
Voting checklist: Verity Scan

(Pre-printed paper ballot)

- Qualify the voter and give them a paper ballot for their correct precinct
- Direct voter to an open booth
- Voter makes ballot choices by filling in the box next to the selections with a black or blue pen
- Voter slips the marked ballot into the provided privacy sleeve (if applicable)
- Voter inserts the voted ballot into the Verity Scan and follow scanner screen directions to cast your ballot.
Scanning Ballots

- After a ballot has been scanned, Verity Scan will display the Processing Ballot screen.
Processing Overvotes

• If scanning manually voted paper ballots, and the voter has *overvoted* (marked too many choices), Verity Scan may allow the voter to: A) remove their ballot and request a new ballot from the poll worker, or B) to cast their ballot as-is (overvoted contests will not be counted).

NOTE: Depends on how the election was set up (determined by your jurisdiction).
Processing Undervotes and Blank Ballots

- If the voter has **undervoted** (marked too few choices, or scanned a blank ballot), Verity Scan may allow the voter to: A) remove their ballot and make changes, or B) to cast their ballot as-is.

NOTE: Depends on how the election was set up (determined by your jurisdiction).
Scanning Ballots

• If the ballot does not scan correctly, the Verity Scan will display the screen shown, and the voter will be instructed to re-scan or contact a poll worker for assistance.
Scanning Ballots

- Once the scanned ballot is accepted, the Verity Scan displays the screen shown, with the waving American flag.
Provisional Ballots

• Follow your local jurisdiction’s guidelines for issuing and casting provisional ballots
• An emergency ballot slot is located on the eScan Ballot Box, if local guidelines require it.
Module 10

End of Day Procedures
Suspending and Re-opening Polls (Early Voting)

- From the Poll Work Tasks screen, choose Suspend Polls
- Enter your Close Polls password and tap Accept
- To reopen polls the next day, follow standard procedures for opening polls
Closing Polls
(Election Day ONLY)

⚠️ Wait until after the close polls time to close polls
⚠️ Once Polls are closed they cannot be reopened on that device.

- Tap Close Polls
- Tap Yes, close the polls
- Enter your Close Polls password and tap Accept
Printing and Filing Reports

• Once Polls have been closed, print and file reports as per your local jurisdiction’s guidelines.
• Different reports are available depending on whether you are suspending polls (Early Voting) or closing polls (Election Day).
Transferring vDrives and Ballots

• Follow your local jurisdiction’s guidelines, including chain-of-custody procedures, when transferring equipment, vDrives, and/or Ballots to your central counting location.

• If you are leaving equipment in place (i.e. during Early Voting), power down the equipment. Be sure to properly secure all equipment, preferably behind a locked door.
Packing up Equipment

• When breaking down Verity Touch Writer or Scan devices, you must properly latch the tablet within the storage compartment and lock the tablet in place.
• Return the power cord, headphones, and tactile switches to the storage compartment on the inside of the lid, to the right of the tablet.
In groups, rotate roles and run a simulated Polling Place. Use the Polling Place Operations Guide as a reference.

- Set up Equipment
- Open Polls
- Add Voters and Vote on Touch Writer and Scan
- Check an Access Code
- Spoil a Ballot
- Print Reports
- Change Printer Paper
- Suspend or Close Polls
- Break Down Equipment
Exercise 10.1

Complete all steps in the Simulated Polling Place Exercise.
Review

• Voter Instructions
  o Language
  o Access Code
  o Make Selections
  o Review Choices
  o Print and Scan ballot

• Assisting Voters with Disabilities
Troubleshooting: Use a Systematic Approach

- Remain calm
- Identify the issue or symptoms as reported
- Gather further information
  - Think broadly
  - Do not jump to conclusions
  - Ask questions
- Establish a theory to explain the source of the problem
- Research resolution steps based on your theory
- Use available documentation to identify the resolution steps
- Attempt resolution
- Check for success
- Repeat
Power Supply Best Practices

• Only use grounded AC power outlets (i.e., three prong outlets).
• Do not use three-prong to two-prong adapters, as these disable the ground path.
• Use power strips with LED’s that show that power is present.
• Ensure that power switches on AC power strips are turned on.
• Test each socket beforehand. It is not uncommon to have a bad socket in a power strip or a wall outlet.
Polling Place Security Recommendations

• **Restrict access to voting equipment** behind locked doors when not in use.

• **Ensure chain of custody** when delivering or transferring any voting equipment or ballots.

• **Maintain documentation** for authentication purposes containing serial numbers, seal numbers and identification to anyone tasked with delivery or transport.

• **Do not leave voting equipment unattended** when polling place is open.

• **Follow local guidelines relating to device seals and chain of custody procedures**, including what to do if a seal is broken.

• **Follow Access Code procedures**. Do not issue Access Codes or ballots until voter has been qualified and there is an available voting booth.

• **Report any suspicious activity** to the local election officer.
Questions?