ExpressPoll® Electronic Pollbook

ExpressPoll Application 7.2.6.1

Training Poll Worker Guide
Flip Stand Hardware

v. 1.1

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Poll Worker Learning Plan

Learning Objectives

This course will provide you with the skills to successfully use the ExpressPoll Electronic Pollbook in your jurisdiction. Upon completion of this course, you will be able to:
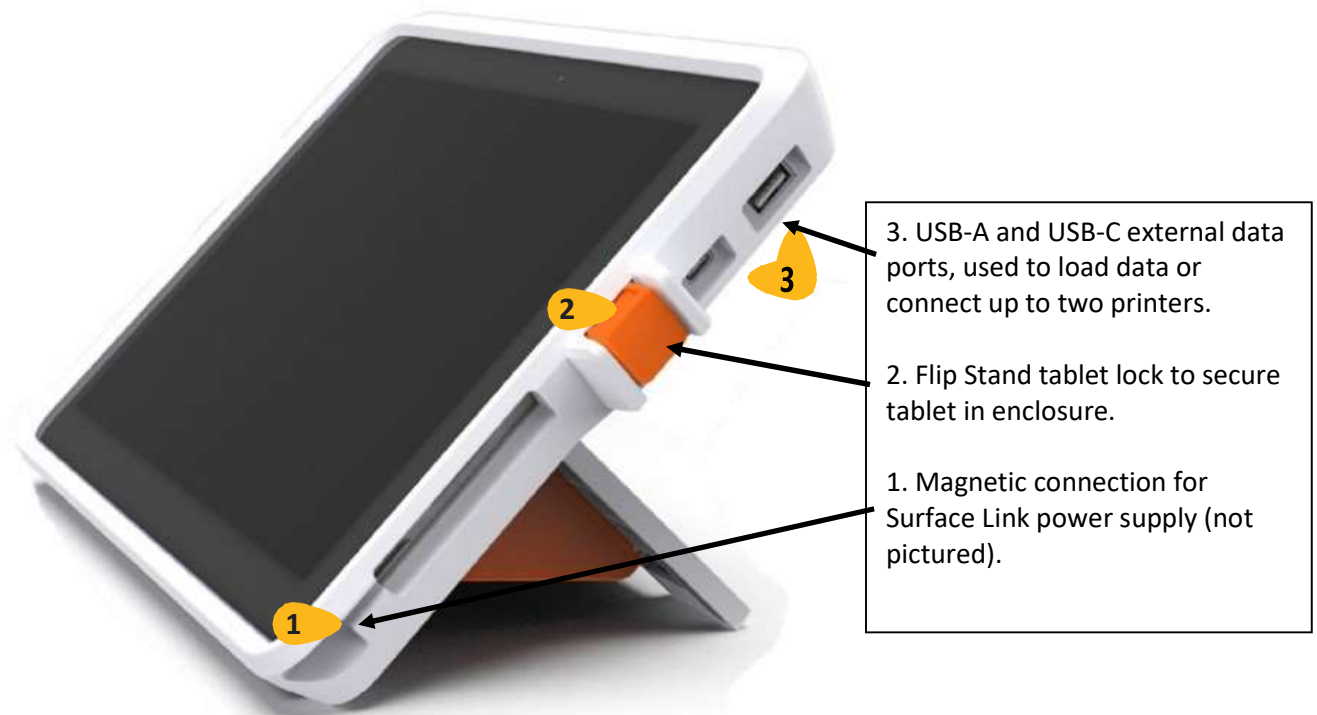
- Set up the ExpressPoll for voter check-in
- Check-in voters using the ExpressPoll Electronic Pollbook

Agenda

- **Understanding the ExpressPoll**
- **Preparing the ExpressPoll for Voter Check-in**
  - » Lab Practice
- **Using the ExpressPoll for Voter Check-in**
  - » Lab Practice
- **Applying What You Have Learned**
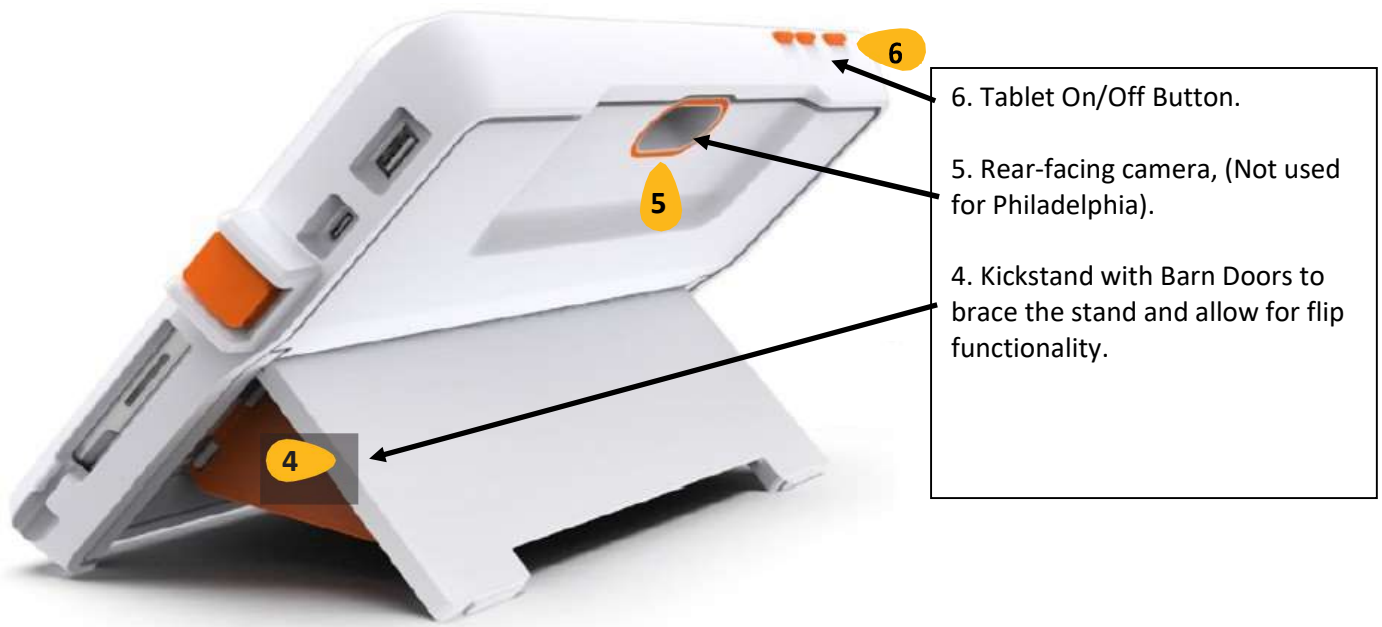
ExpressPoll® Electronic Pollbook

Product Overview - ExpressPoll Flip Stand Hardware

3. USB-A and USB-C external data ports, used to load data or connect up to two printers.

2. Flip Stand tablet lock to secure tablet in enclosure.

1. Magnetic connection for Surface Link power supply (not pictured).

The ExpressPoll Flip Stand securely houses the tablet and includes two external USB hubs. The ExpressPoll Flip Stand also features a unique kickstand with "barn doors" which allow the tablet to be flipped to capture voter signatures and other voter interactions.

- When connected to power, the tablet's internal battery will charge, and power will be supplied to the tablet

- When disconnected from power, the tablet's internal battery will provide up to four hours of battery backup to the tablet

6. Tablet On/Off Button.

5. Rear-facing camera, (Not used for Philadelphia).

4. Kickstand with Barn Doors to brace the stand and allow for flip functionality.

Preparing Connectivity for ExpressPoll

A wireless device (Network Box) will synch ExpressPoll locally (peer to peer) during Polls Open Hours, and to a central host before Open Polls.

- One Network Box is provided per each polling place *(not every division will have a Network Box)*
- Network Box will be attached to the top rear of the 'A' ExpressVote XL Voting Machine
    - Setup of the Network Box is only required if your Division's 'A' machine has a Network Box attached to it

The pictures below show the Network Box and its power button. The Network Box cannot be opened or serviced by Election Board Workers.


Network Box

Network Box Power Button

Set-Up of the Network Box

1. **Locate the Black Network Box that is attached to the 'A' ExpressVote XL.**

2. **Verify the Network Box is plugged in. The Network Box should arrive plugged into the XL, verify the power cable is plugged into the side of the Network Box and the side of the XL.**

3. **Power on the Network Box. Before opening polls, power on the Network Box by pressing the silver power button on the outside of the box. When powered on, the area surrounding the button will light up blue.**

Preparing the ExpressPoll for Use
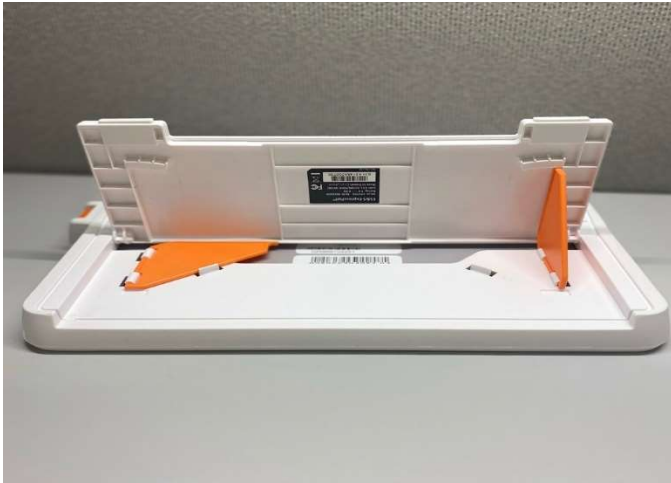
Setting Up the Flip Stand

To prepare the flip stand for use, first open the kick stand to reveal two orange brackets. Lift each bracket to free them from their white clasps (you will hear a snap). Swing each orange bracket out until you hear a click, indicating that the bracket is locked.

With both brackets locked you can easily flip the ExpressPoll over to be viewed by poll workers and voters and back again.

Power Button

Powering Up the ExpressPoll

Connect the black power cord into the bottom right power port on the side. Plug the power cord into an A/C power outlet. Ensure the outlet is active and ready to use.

Press the orange power button on the top of the ExpressPoll flip stand (the power button is the furthest button on the front left edge).

After boot-up, verify ExpressPoll is powered by checking screen (upper right) for a green battery icon with lightning bolt.

When disconnected from power, the tablet's internal battery will provide up to four (4) hours of power to the tablet.

Printer Setup

Take the printer and cables out of the back compartment of the XL voting machine. The thermal printer has two input ports: the **DC24V** (power cable, on left) and the **USB** (right).

The DC24V port is used to connect a power cable to the printer. **Pull back on the cable's plastic sheath when connecting and disconnecting the power cable** to ensure that the connection is successful.

The USB port is used to connect the printer to the ExpressPoll via one of the unit's dual USB ports.
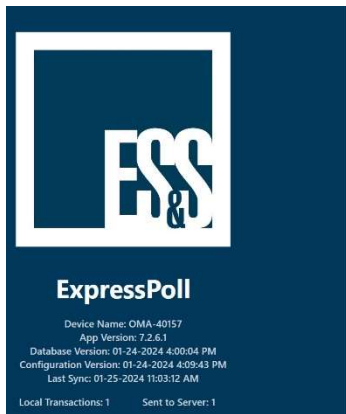
Once the cables are connected, Press and hold the power button on the printer for a few seconds. The light will turn **blue** when the printer is on.

Later- After Launching- The printer logo on the top of the ExpressPoll screen will be **green** when the ExpressPoll and the printer are connected.

Launching the ExpressPoll

Launching & Login

Once the tablet is powered on, the initial launch screen will display jurisdictional and election specific information.

From here, you can launch the software, enter Maintenance mode, or shut down the tablet.

To get to the initial launch screen, touch the **Launch** button. When prompted, enter the Pollbook Qualification Code ("PQC") then touch **Submit**. Please allow a few seconds to advance to next screen.

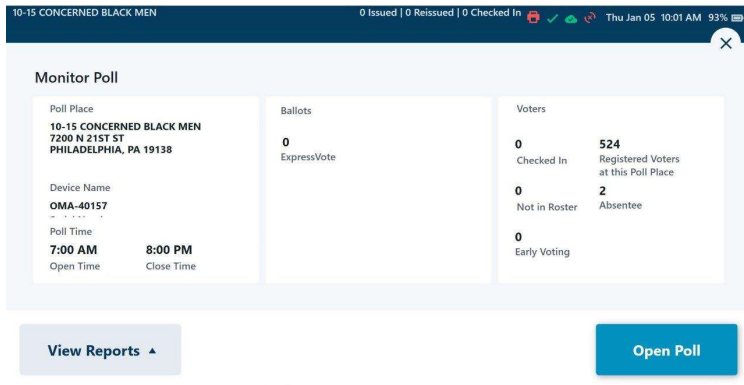*More information: ExpressPoll User Guide, p. 10*
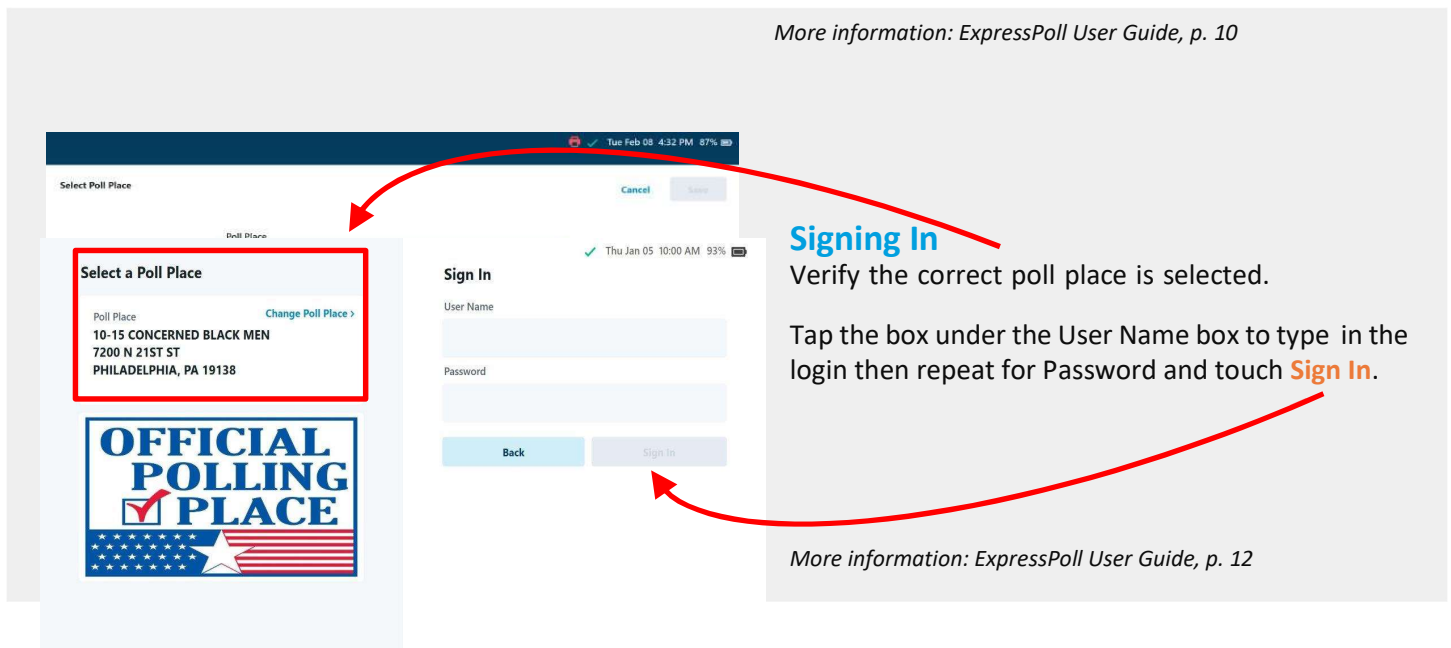
Signing In

Verify the correct poll place is selected.

Tap the box under the User Name box to type in the login then repeat for Password and touch **Sign In**.

More information: ExpressPoll User Guide, p. 12

# Opening Polls & Search for Voter Screen

Opening the Poll

From the Monitor Poll screen, touch **Open Poll**.

Once the poll is open, information related to the number of voters checked in will display on the main screen, along with the Poll Open or Closed status.

When you first open polls, this screen will show that no voters have checked into your division.

*More information: ExpressPoll User Guide, p. 15*
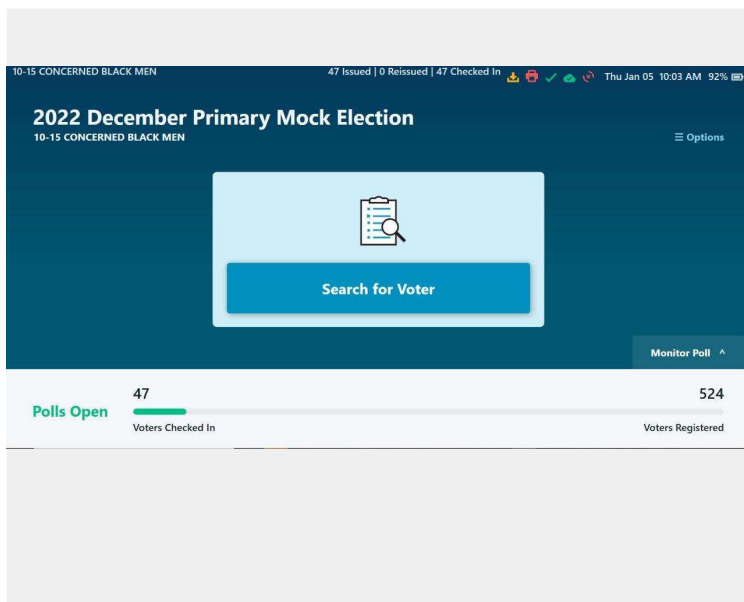
Voter Check-in Verifications

On the top left of the screen, the polling location logged in will be listed.

The number of voters checked in and the number of registered voters can be found at the bottom of the screen.

Note: The number of ballots issued, minus the number of Spoiled/Reissued ballots equals the number of voters checked in.

Using ExpressPoll for Voter Check-In
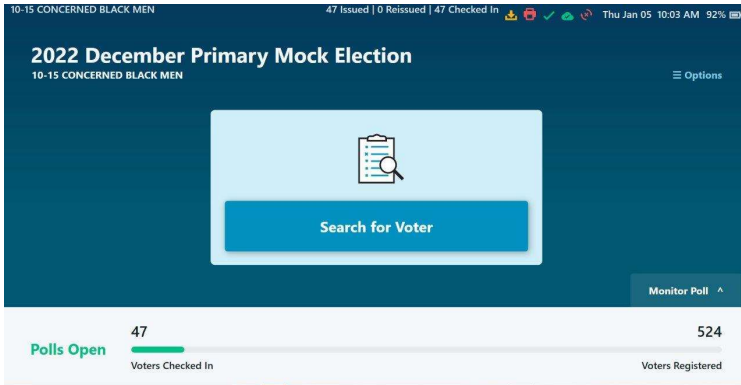
Searching for Voters

To conduct a manual search, select the **Search for Voter** button on the main screen. Select a search field and use the keyboard to enter the voter's **Last Name**, **First Name**, **Date of Birth** or a combination of these items. Possible voters will appear interactively as letters are typed into the search field.

Matching results will be displayed below.
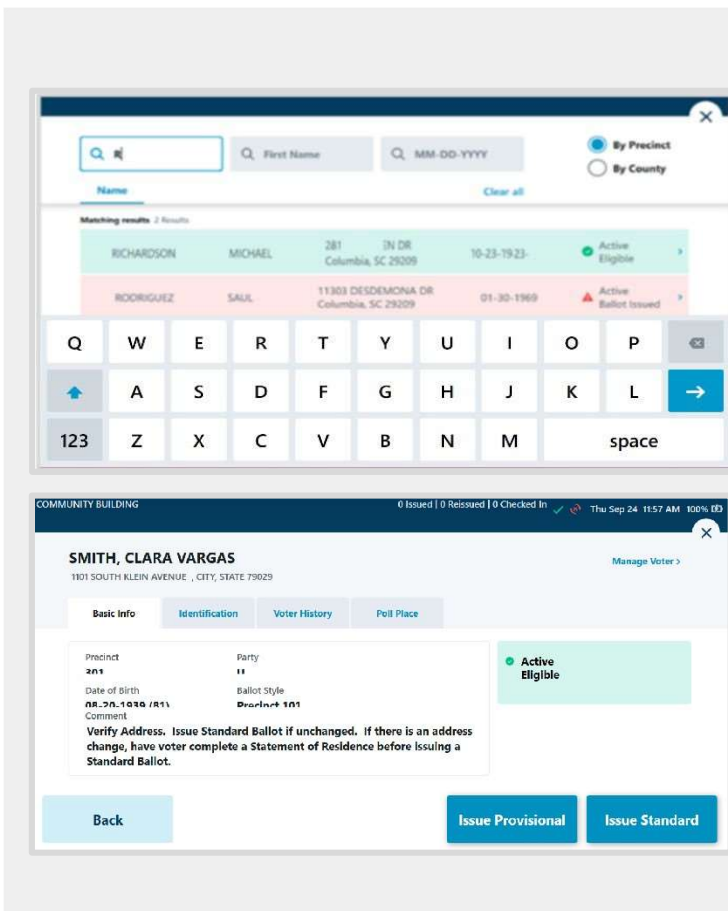
Voter Details & Status

Voter results will appear using a red, yellow, green color-coding system.

Color	Description
Green	Voter may vote a standard ballot.
Yellow	Voter may vote provisional ballot, or some action is required before voter can be issued a standard ballot.
Red	Voter cannot vote due to exceptions with their voter record.

Touch the voter's name to view their basic information and identification. The expanded search will include citywide results. Voters in this set of results may be assigned to a different poll place. Select the voter from the results by tapping on the **voter name**.

ⓘ Active-Must Show ID
Eligible

Comment

VOTER MUST SHOW ID. Approved forms of photo ID can be found in the Election Guide. Confirm that this is the correct voter using name, month and day of birth and address.

ⓘ Inactive
Eligible

Comment

THIS VOTER IS INACTIVE. The voter must sign an AFFIRMATION OF ELECTOR before Voting. Affirmation forms can be found in your election day supplies.

Common Yellow & Red Voter Status Examples

1.) YELLOW: *Active-Must Show ID*
2.) YELLOW: *Inactive Eligible*
3.) YELLOW: *Active ABS/Mail In Issued*
4.) RED: *Active ABS/Mail In Returned*

ⓘ Active
ABS/Mail In Issued

Comment

This voter was issued a ABSENTEE or MAIL IN ballot that was not returned to the Election Office. Voter must surrender their ballot & Declaration Envelope and sign Surrender form OR vote a Provisional Ballot.

⚠ Active
ABS/Mail In Returned

Comment

Voter has already voted by mail. If voter believes this was recorded in error, they may receive a Provisional Ballot.

Issuing an ExpressVote XL Ballot

1.) To complete issuing an ExpressVote XL ballot, verify the voter status and select **ExpressVote XL Ballot**. Note: Comment section will provide instructions on how to proceed based on the voter status

2.) Board Worker touches green circular arrow icon and flips ExpressPoll towards voter

3.) Voter signs tablet and touches *Done Signing*

4.) Board Worker flips tablet back and verifies signature. If signature matches, Board Worker initials box, then touches *Accept*

5.) For Primary Elections, Select Voter's Party, then touch *Next*

6.) Insert paper ballot into ExpressVote Printer

7.) Touch Complete Check-in. ExpressVote Printer will print header barcode and release ballot
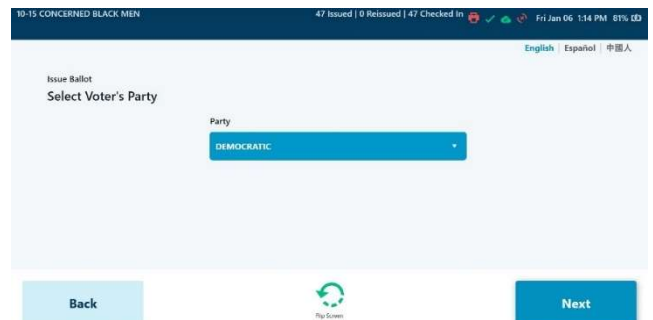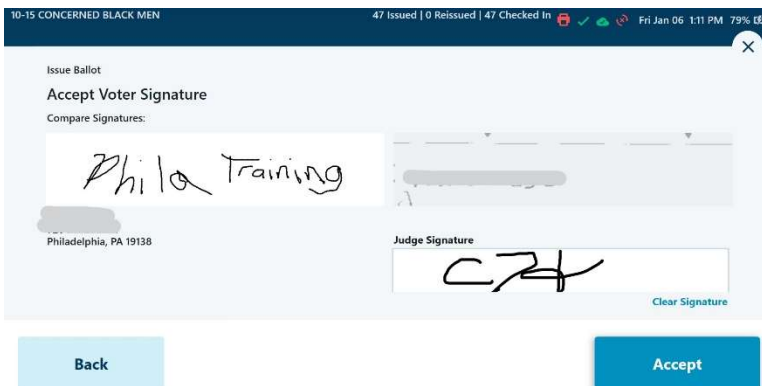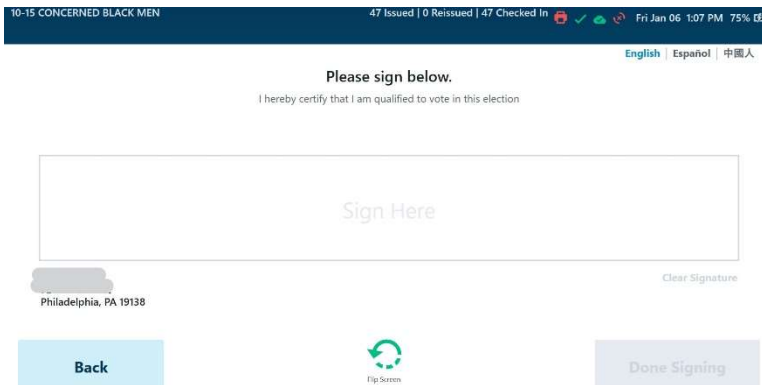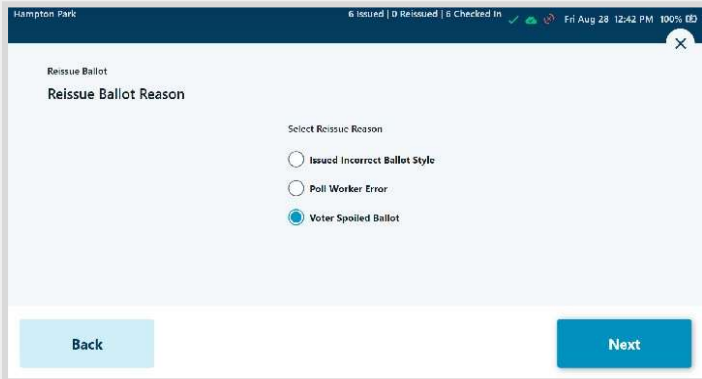
Spoiling a Ballot

Used when a voter needs to spoil a ballot because of an error voting, surrendering a mail-in or absentee ballot, or a board worker mistake was made.

Spoiled Ballot Steps:

1.) Search for the voter needing a new ballot and touch the voter name. Verify the voter then touch **Spoil Ballot**.
2.) Choose the **Reason,** then touch **Next**.
3.) Board Worker touches green circular arrow icon and flips ExpressPoll towards voter
4.) Voter signs tablet and touches *Done Signing*
5.) Board Worker flips tablet back and verifies signature. If signature matches, Board Worker initials box, then touches *Accept*
6.) Insert paper ballot into ExpressVote Printer
7.) To complete check-in, Touch Complete Check-in. ExpressVote Printer will print header barcode and release ballot

Redirecting Voters & Monitor Polls Screen
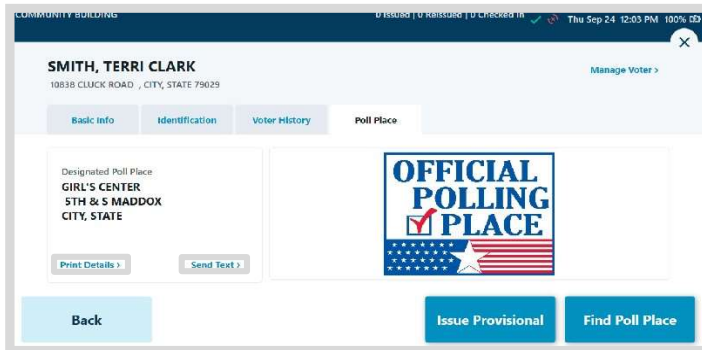
Directing Voters to Correct Polling Place

If a voter is found but is in the wrong polling place, touch the **Poll Place** tab on the Voter Information screen to view the correct polling location.
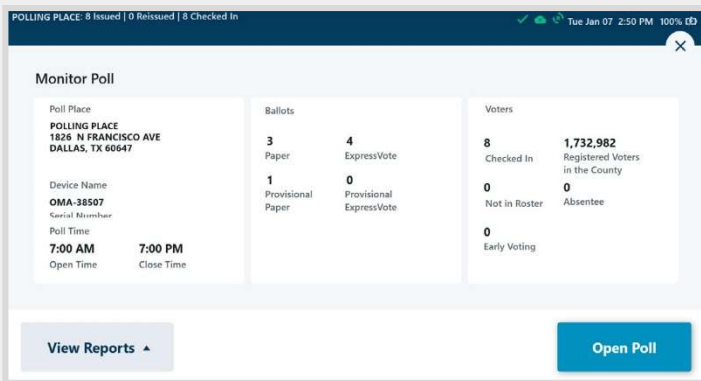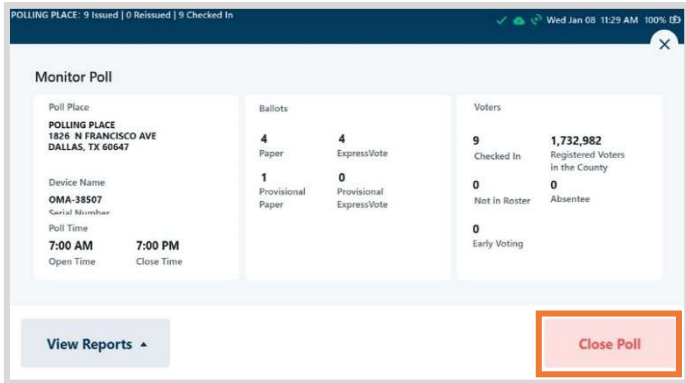

Monitoring Poll

To access the Monitor Poll screen, touch the **Monitor Poll** button on the bottom right of the main page.

From the Monitor Poll screen, you can review information for the polling location, **View Reports** and **Open/Close Poll**.

Please Note: Once the poll is open, information related to the number of voters checked in will display, along with the Poll Open or Closed status.

More information on Reports: ExpressPoll User Guide, p. 17

Closing the Poll

Closing the Poll

When it is time for the polls to close, touch **Monitor Poll** from the main screen (bottom right). Reports may be viewed before closing polls from the Monitor Poll screen.

To close the poll, touch the red **Close Poll** button in the bottom right corner of the screen.

A prompt will appear providing the option to sign out. If you select **Yes**, you will be signed out of the system when you close the poll.

After returning to the Launch screen, touch **Shut Down** to power the tablet off. Confirm shutdown by touching **Yes**.

Appendix A: ExpressPoll Reports

ExpressPoll Reports

To access the ExpressPoll reports, touch the **View Reports** button on the Monitor Poll screen. The following options are available:

Report Name	Description
1. Ballot Totals	Details about ballots issued including: ballots issued, reissued, canceled, net ballots, and types of ballots issued.
2. Voted List	List of voters who have voted including their names, parties, and precincts. The Voted List can be filtered by party, roster status, and the date & time.
3. Reissued Report	Provides a list of reissued ballots in the election.
4. Spoiled Ballot Report	Provides a count of spoiled ballots in the election.
5. Voter List	Provides a list of all the voters in the election.
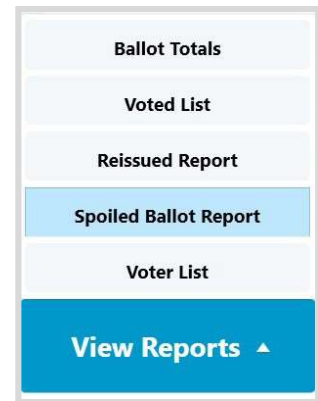
Appendix B: Icons Index

Icons Index

Network Connections		
		Printer Connected
		Printer NOT Connected
		Wi-Fi Connected
		Wi-Fi NOT Connected
		Peer to Peer Connected
		Peer to Peer NOT Connected
		Host Connected
		Host NOT Connected
Battery		0%
		50%
		100%
		Charging
Functional Icons		Close
Messaging Warnings		Success
		Warning
		Error

Appendix C: Troubleshooting Guide

1. What should I check when ExpressPoll device is turned ON?

1. Check the polling place you are logged into is the correct poll place.
2. Check that all the icons in the top right corner are green.
3. Verify that the Election Name and Election Date are correct.

2. What should I do if the cloud icon is YELLOW?

ExpressPoll is establishing connection to the server. This may occur Before Polls Open Only.

1. Confirm Network Box is on. You may need to reposition the ExpressPoll for better signal strength(closer to the Network Box).
2. ExpressPoll automatically reestablishes connection every 5 minutes to cloud before Polls Open.

3. What do I do if any of the above icons are RED?

If the printer icon is red, the pollbook is not connected to a printer.

1. Ensure that the printer is connected to the pollbook.
2. Ensure that the printer is connected to power and turned on (blue indicator light).
3. If the icon is green this means all expected printers are connected.

If the check mark is red, the pollbook is not connected to the Network Box.

1. Confirm the Network Box is powered ON in your polling place.
2. Confirm all ExpressPolls in your division are turned on and logged in.
3. If Network Box is turned ON **AFTER** log-in, allow up to 5 mins to establish connection.
4. If issue still persists, You may need to reposition the ExpressPoll for better signal strength(closer to the Network Box).

If the cloud is red <u>BEFORE Polls OPEN</u>**, the pollbook is not communicating with Host for an update.**

1. BEFORE Polls Open at 7:00 AM- after logging into ExpressPoll- a green cloud should present. If RED, Confirm the Network Box is powered ON. This also applies to your checkmark color. Check mark should be GREEN.
2. If check mark is red, the pollbook does not have connection to Network Box. Follow Red check mark steps above.
3. **Red Cloud is OK during Polls Open Hours**, after 7:00 AM, when host connectivity is not allowed.

If the circle icon is red with an X in the center, the pollbook is not communicating with its peers (peer-to-peer).

1. Confirm the Network Box is powered ON in your polling place.
2. Confirm **ALL** ExpressPolls in your division are turned on **and also** <u>logged in.</u>

Appendix C: Troubleshooting Guide

4. What should I do if ExpressVote Printer is NOT detected by the ExpressPoll tablet?

This might happen when the printer is not properly connected to the device or to the power source. To correct the issue:

1. Check all the cords to make sure the printer has power, is turned on, and is connected to the ExpressPoll.
2. Shutdown the ExpressPoll.
3. Disconnect the power cable from power source AND USB cable from the ExpressPoll
4. Reconnect the power cable and make sure both the power cable and data cable are properly connected to the printer.
5. Reconnect the USB cable from the printer to the ExpressPoll.
6. Turn ON the printer (long press the power button).
7. Power ON the ExpressPoll device.
8. If you have already attempted to reestablish the connection following the instructions in the previous section, please check in the voter by "Reissuing" another ballot using a different ExpressPoll device.
9. Attempt to replace the ExpressVote printer. If there is no other printer available, do not continue to use this pollbook to check in voters and issue ExpressVote activation cards.

5. What should I do when I cannot find a voter by searching

This might happen when too much information has been entered into the search fields. To correct this issue:

1. Type the **first three (3) letters of the voter's last name** in the **Last Name** field and then type the **first letter of their first name** in the **First Name** field. All voters who meet this criteria will be displayed in the Matching Results list.
2. If you cannot find the voter in the Matching Results list, touch **Clear All**. Type the voter's birth date in the **Date of Birth** field using **MM-DD-YYYY** format
3. Call the City Commissioners' Election Hotline at **(215) 686-1590** for help. If you cannot find someone, provide them with a Provisional Ballot.

6. What should I do when ExpressPoll does not start up to Launch Screen?

1. Click **OK** on the pop-up screen to reboot.

Appendix D: Poll Worker & Time Card Management

Poll Worker Management

Poll Worker Management is located in the *Options Menu* (upper right) on ExpressPoll search screen.

This feature contains two (2) Options that allow for poll worker and timecard management: **Find Poll Worker** and **Time Card**. All information is sent to the Server for monitoring and reporting purposes.
Please note: Timecard feature will not be used.

Board Worker Payroll Steps for Election Day – *This is how we get you paid accurately and on time*

After Polls are successfully opened, and the volume of voters are manageable, you may now complete your payroll via ExpressPoll.

1.) Enter Poll Worker Management via three lines *Options* upper right from search screen (image above)
2.) Tap *Poll Worker Management* and select *Poll Worker Management* in blue font
3.) Select *Find Poll Worker*
4.) Tap white space to collapse keyboard
5.) Select *Add Poll Worker*
6.) First Tab- *Poll Worker*- Complete all required fields including: First Name, Last Name, Date of Birth, your role in Job Title drop down
7.) Second Tab- *Address*- Complete all fields including: *Address, City, State, Zip Code*
8.) Third Tab- *Contact*- Complete Field: Home or Cell

Poll Worker Management Continued

9.) Icon (Upper Right) will turn blue and select *Save*. If Save icon remains gray double check ALL Required Fields. NOTE: Please double check all fields in all three tabs before saving.

10.) Select OK Icon

11.) Select Back

12.) Tap in white space to collapse keyboard then select *Back* if no more Board Workers are logging in. If additional Board Workers are logging in, Select Add Poll Worker and repeat steps.

13.) Before Exiting, please confirm all fields are completed- in all three tabs- before exiting.

14.) To Exit, select Exit to ExpressPoll in upper right