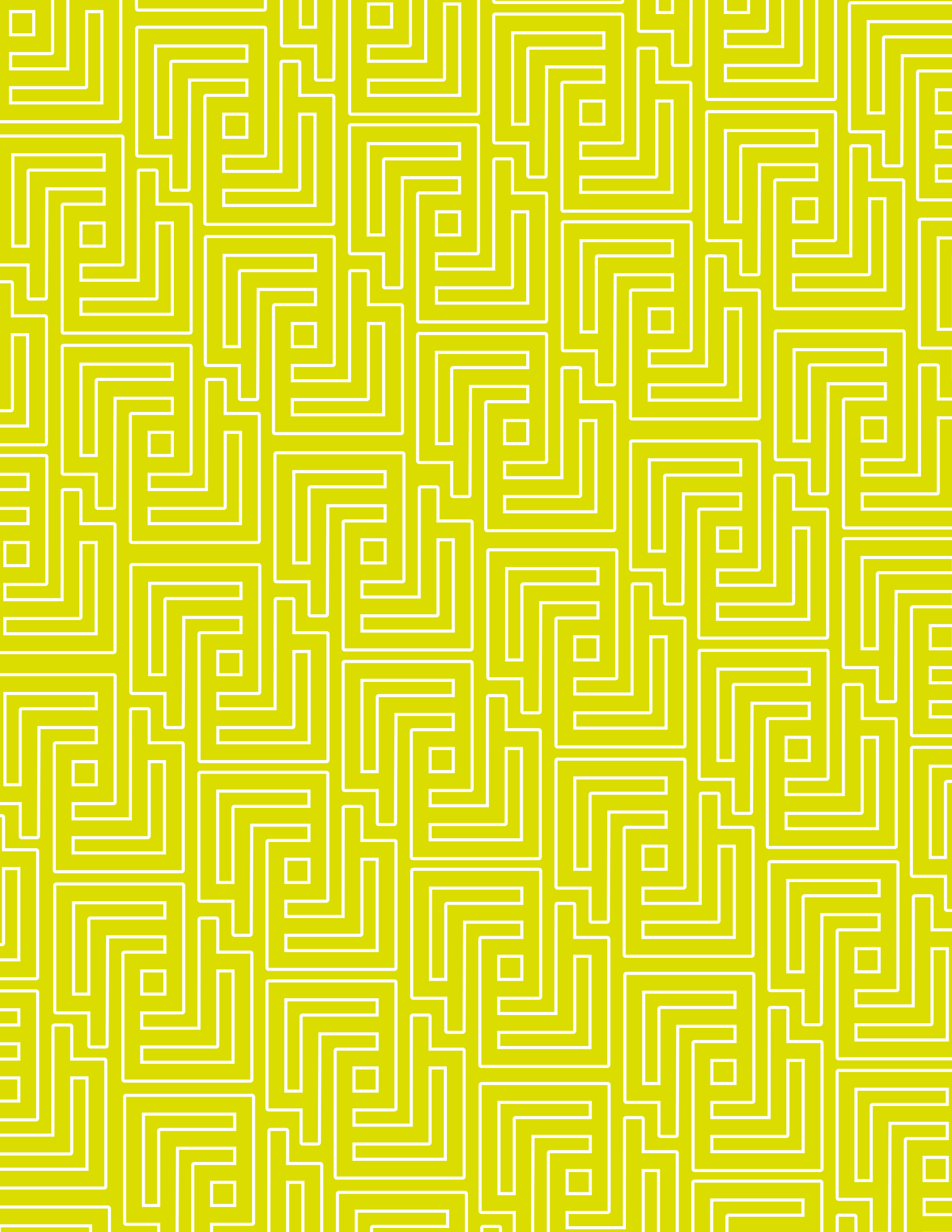


# POLL PAD | training guide

THE STATE OF NEW YORK





# index

**8**

**opening procedures**

---

**14**

**processing voters**

---

**26**

**closing procedures**

---

**29**

**help desk**

---

meet the

# POLL PAD<sup>®</sup>

(UNIT WITH PRINTER - If not using a printer proceed to page 6)



1 Power Button

2 Home Button

3 Poll Pad & Plastic Shell

4 Stand Arm

5 Poll Pad Base

6 Camera

7 ID Tray



- 1 Green Case
- 2 Poll Pad
- 3 Poll Pad Base  
(stand arm located under base)
- 4 Lightning to  
USB Cable  
& USB Power  
Adapter
- 5 (2) Stylus
- 6 ID Tray
- 7 Printer & Cords
- 8 Screen Cloth



meet the

# POLL PAD<sup>®</sup>

(NO PRINTER UNIT)



**1** Power Button

**2** Home Button

**3** Poll Pad & Plastic Shell

**4** Stand Arm

**5** Poll Pad Base

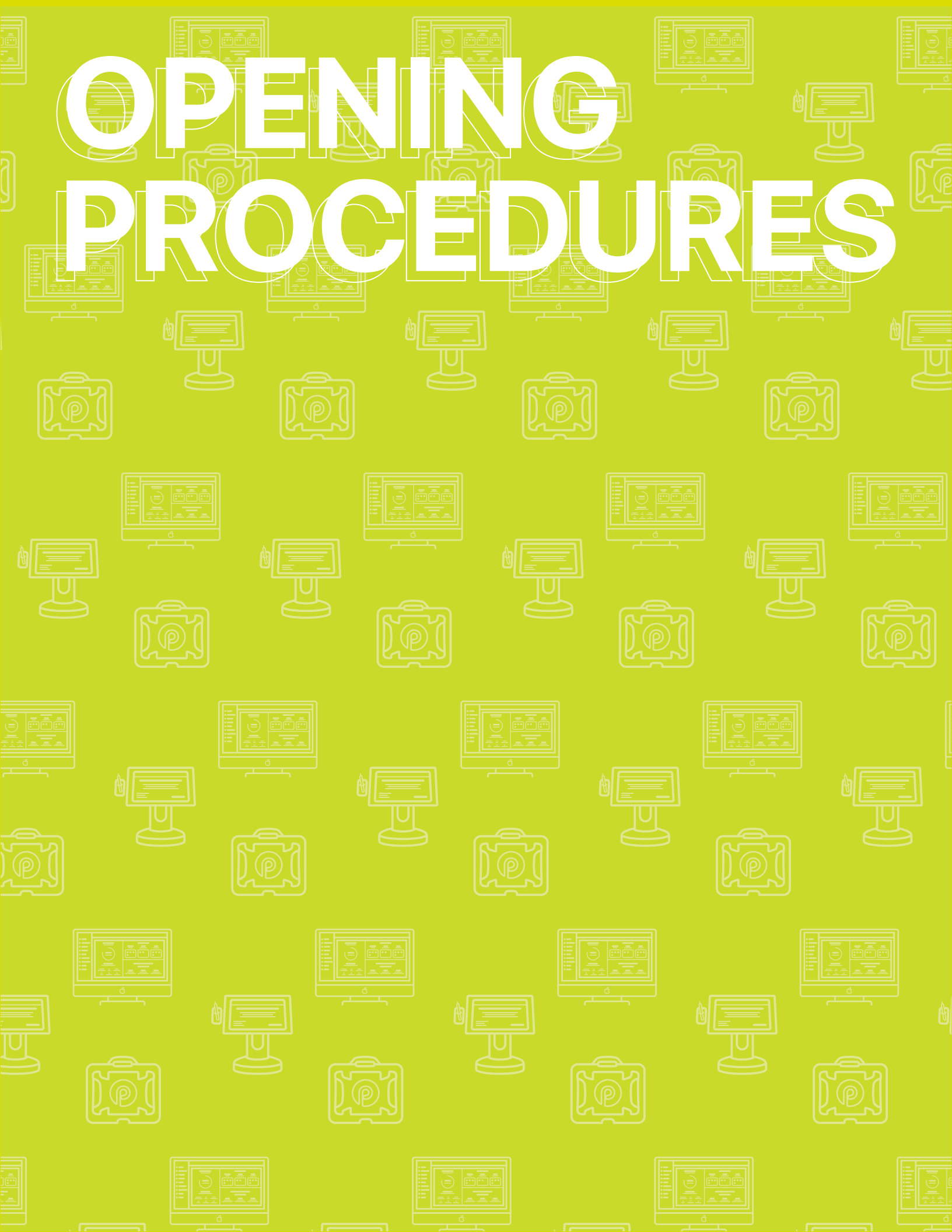
**6** Camera

**7** ID Tray



- 1 Green Case
- 2 Poll Pad  
(stand arm located on backside)
- 3 Stand Base
- 4 Lightning to  
USB Cable  
& USB Power  
Adapter
- 5 (2) Stylus
- 6 ID Tray
- 7 Screen Cloth  
(located under Stand Base)

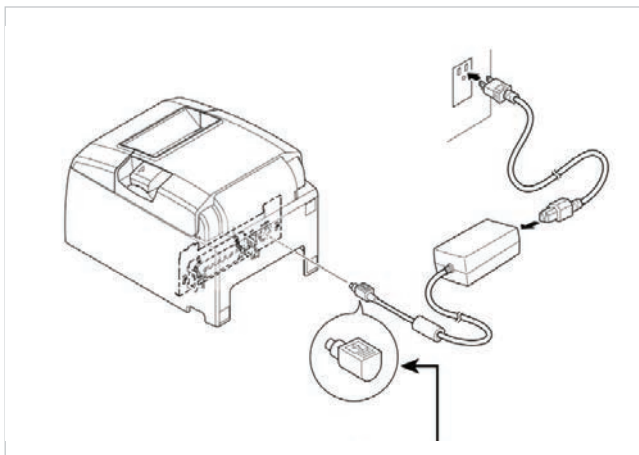
# OPENING PROCEDURES





## OPENING PROCEDURES | POLL PAD SETUP

(If not using a printer please proceed to Step 6)



### 1 LOCATE PRINTER

Open the transport case and remove printer, adapter and power cord.



### 2 CONNECT TO POWER ADAPTER

Connect the power cord to the power adapter.

**NOTE: Ensure secure connection**



### 3 CONNECT TO PRINTER

Plug the connector into the back of the printer.

**NOTE: Ensure secure connection**



### 4 PLUG PRINTER INTO OUTLET

Plug printer into a power source.

**NOTE:** Make sure your check-in table is close to the wall outlet or you have an extension cord or power strip available.



### 5 TURN PRINTER ON

The ON/OFF switch is located on the left side of the printer. If you do not see a green power light on the front panel, check the power cord connections and make sure the outlet has power.

**NOTE:** If you see a red error light refer to page 30.



### 6 STAND ARM

To attach the stand arm to the Poll Pad shell, press the buttons on the side of the arm and place in circular opening. Release buttons and rotate the arm until you hear a click.

**NOTE:** Sticker with jurisdiction name and number will be on top.



### 7 CONNECT ARM TO BASE

Take stand arm and place into Poll Pad base. Once attached rotate Poll Pad making sure the camera is on top, oriented in a landscape position.

**NOTE:** Sticker with jurisdiction name and number will be on top.



### 8 ATTACH PHOTO ID TRAY

Attach the ID tray to the Poll Pad using the mounting clip. Once attached, insert stylus into the holding slot. Adjust the Poll Pad to a suitable angle.



### 9 CONNECT POLL PAD TO POWER

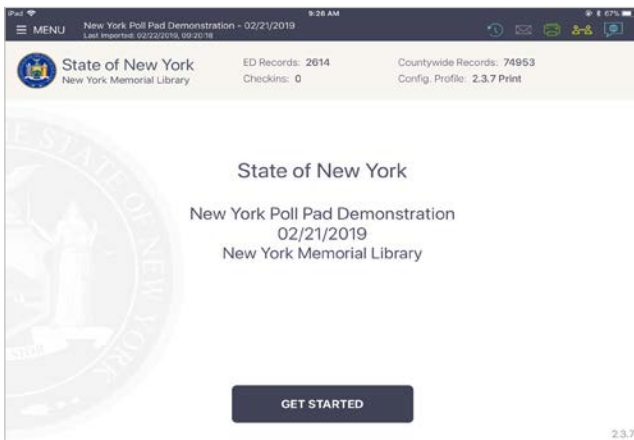
Plug the lightning connector into the Poll Pad, then plug the power adapter into a power source.



### 10 POWER ON POLL PAD

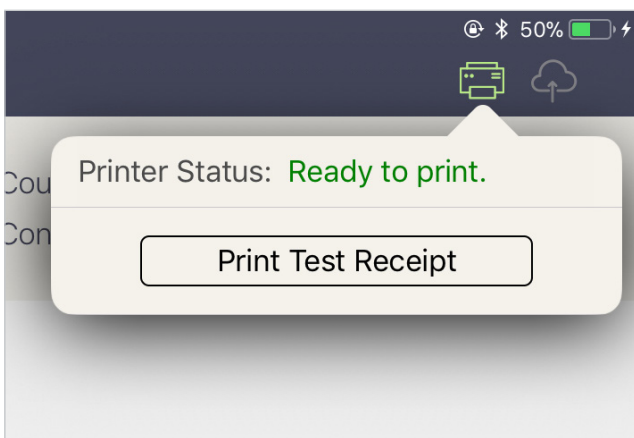
Press the power button on the top left edge of the unit until you see the Apple icon, then release. The Poll Pad will power on, and the Poll Pad application will launch automatically.

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



### 11 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)



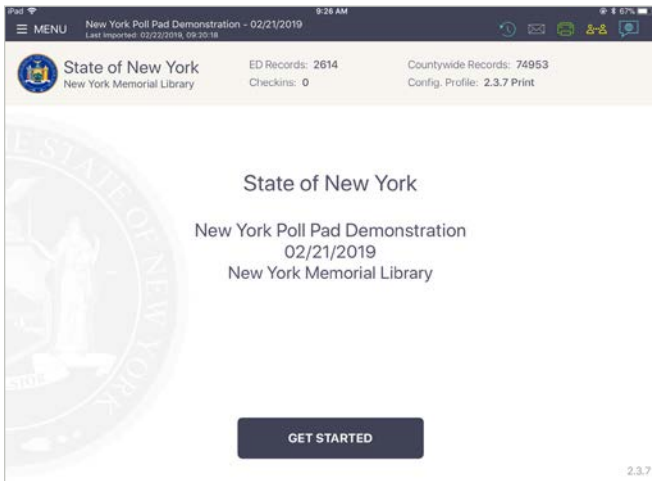
### 12 CONNECT & TEST PRINT (IF USING A PRINTER)

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.



# OPENING PROCEDURES | POLL PAD ICONS



## PRINTER ICONS & COLORS (IF USING A PRINTER)



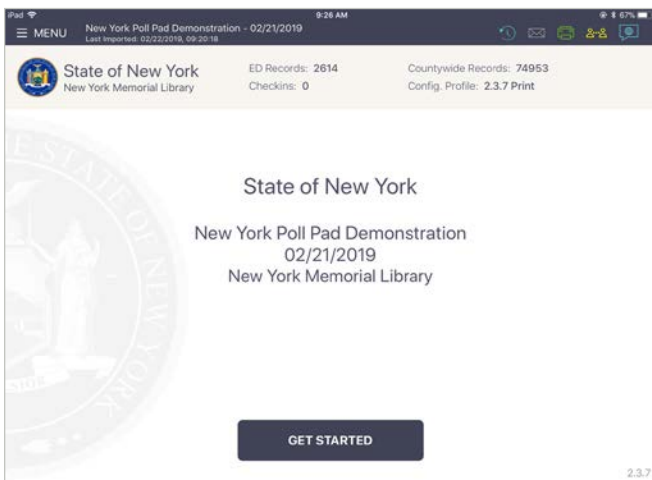
Poll Pad is paired with the printer. A receipt will print out for checked-in voters and those who are in the wrong precinct.



Poll Pad recognizes the printer and is currently in the process of pairing with the device.



Poll Pad is not paired with the printer. Confirm printer is turned on. Select the printer icon, followed by Pair and Connect.



## MULTI-PEER ICONS & COLORS



Poll Pad is currently connected and synchronizing with the other poll site Poll Pads.



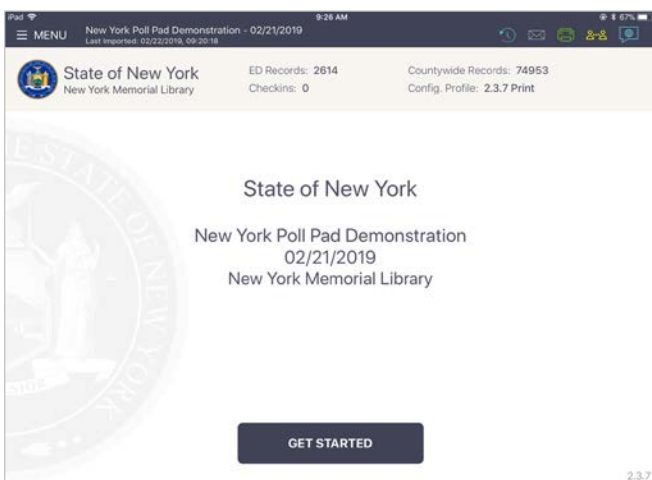
The number inside of the blue circle indicates the number of poll site units the Poll Pad is connected to.



Poll Pad recognizes the presence of other poll site Poll Pads but is not connected or synchronizing with these units.



The Poll Pad is currently disconnected and not synchronizing with the other poll site Poll Pads. **CONTINUE TO PROCESS VOTERS.** Contact the Coordinator.



## CLOUD SYNC ICONS & COLORS



Poll Pad is currently connected and synchronizing with the central election database.



Poll Pad is in the process of connecting to the central election database.



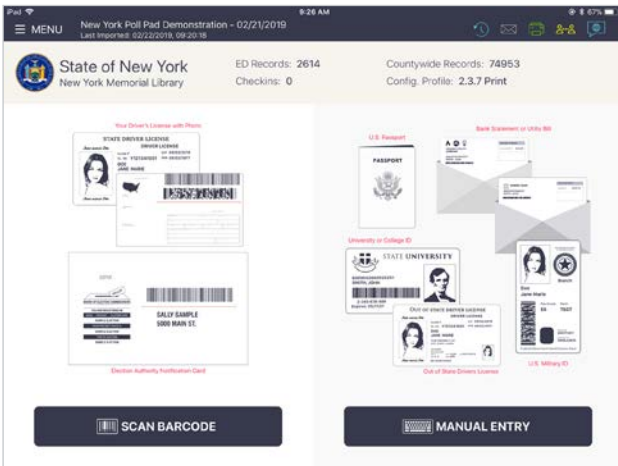
The Poll Pad is currently disconnected and not synchronizing with the other poll site Poll Pads. **CONTINUE TO PROCESS VOTERS.** Contact the Coordinator.

# PROCESSING VOTERS

# PROCESSING VOTERS | SEARCH BY MANUAL ENTRY

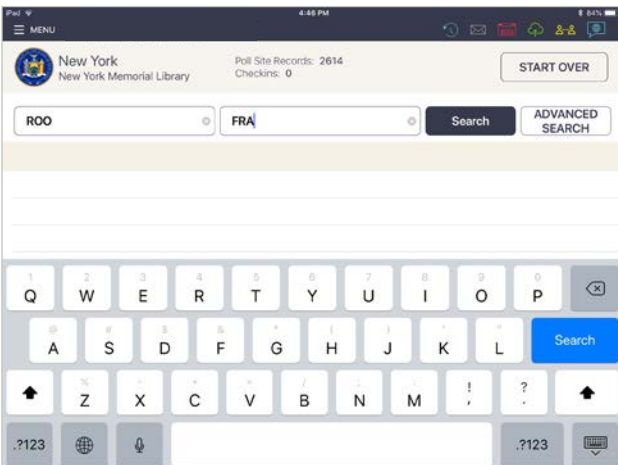
## 1 SEARCH BY NAME

Press **Manual Entry** to locate the voter by using his or her first and last name.



## 2 ENTER VOTER'S NAME

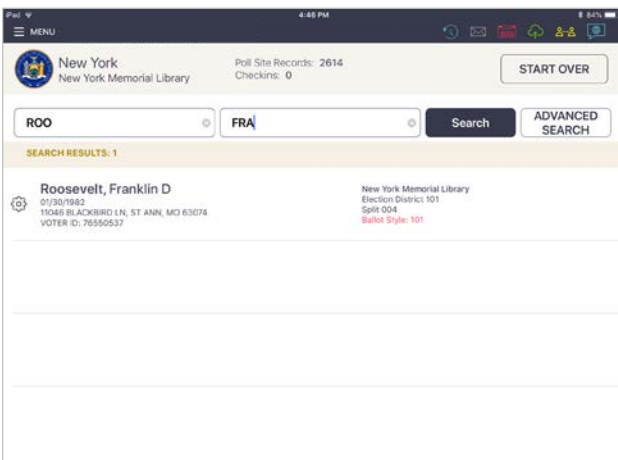
Use the on-screen keyboard to enter the first three (3) letters of the voters last and first name, then press **SEARCH**.



## 3 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.

**NOTE:** Search results show both in-precinct and out of precinct voters. Out of precinct voters display in gray with an indicator that reads "Wrong Precinct."



## PROCESSING VOTERS | SEARCH BY MANUAL ENTRY

### 4 VOTER CONFIRMATION

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

State of New York  
New York Memorial Library

VOTER  
CONFIRMATION

GO BACK ACCEPT

Verify voter information and tap accept to continue

**Franklin D Roosevelt**  
DOB: 01/30/1982  
11046 BLACKBIRD LN, ST ANN, MO 63074

Voter ID:	Status:	Election District:	Split:
76550537	Active	101	004

### 5 VOTER SIGNATURE

Rotate the Poll Pad to the voter to complete their oath and capture signature. Once complete, rotate back and press **DONE SIGNING**.

State of New York  
New York Memorial Library

SIGNATURE  
CONFIRMATION

GO BACK DONE SIGNING

Franklin D Roosevelt  
11046 BLACKBIRD LN, ST ANN, MO 63074  
ED: 101

CLEAR SIGNATURE

*Franklin D Roosevelt*

I am or am not what I reside at the address above and am eligible to vote in this election.

### 6 POLL WORKER CONFIRMATION

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

State of New York  
New York Memorial Library

POLL WORKER  
CONFIRMATION

START OVER SUBMIT

CONFIRM THE ELECTOR'S INFORMATION

**Franklin D Roosevelt**  
11046 BLACKBIRD LN, ST ANN, MO 63074  
Election District 101 DOB: 01/30/1982  
Split 004 Voter ID: 76550537  
Status: Active

Signature on File  
*Franklin D Roosevelt*

Signature on Election Day  
*Franklin D Roosevelt*

Ballot Style: 101

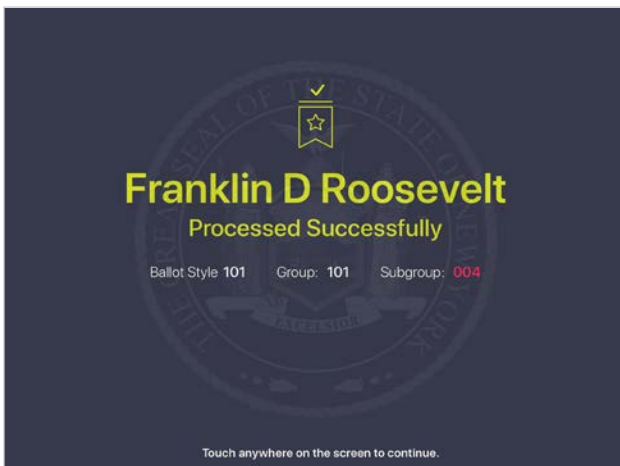
☐ Challenge Voter ☐ Assistance Required

Initial *CR* Initial *LR*



## 7 PROCESSED VOTER

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



## PROCESSING VOTERS | ID REQUIRED

### 1 LOOK UP VOTER

Lookup the voter's record. You'll notice their record contains a status that reads "ID Required." Press voter record.

Search Results: 4

Name	DOB	Address	Voter ID	Status	Location
Van Buren, Martin	12/05/1902	9704 CHELLS DR, ST LOUIS, MO 63134	76500018	ID Required	New York Memorial Library Election District 101 Split 001 Ballot Style: 101
Van, Marquis J	11/06/1943	954 BOALSBRG CT, BALLWIN, MO 63021	76562826	Absentee	National Blues Museum Election District NBM Split 008 Ballot Style: 355
Vandyke, Marley Q	09/05/1916	8247 PROCPHO LN, ST LOUIS, MO 63134	76551161	Absentee	First Baptist Church Election District STR Split 004 Ballot Style: 422

ID Required

### 2 FOLLOW PROMPT

A prompt will appear, follow written instructions. If the voter has a valid form of identification, press **Valid ID**.

**ID Required**

**Van Buren, Martin**  
12/05/1902  
9704 CHELLS DR, ST LOUIS, MO 63134  
Town 101, ED 001

VALID ID  
NO ID PROVIDED

Voter must show acceptable form of ID in order to cast a ballot today.  
Valid forms of ID are: Driver's License, Student ID, Military ID, Government ID, Fire-Arm Permit, Pilot's License, Non-Drivers DMV ID, Utility Bill, Bank Statement, and Checks.  
\*\*The ID must show Name and Address of Voter.

For further information, please call the Board of Elections  
555-555-5555

### 3 VOTER CONFIRMATION

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

**Voter Confirmation**

Verify voter information and tap accept to continue

**Martin Van Buren**  
DOB: 12/05/1902  
9704 CHELLS DR, ST LOUIS, MO 63134

Voter ID: 76500018 Status: ID Required Election District: 101 Split: 001

GO BACK ACCEPT

## PROCESSING VOTERS | ID REQUIRED

State of New York  
New York Memorial Library

Martin Van Buren  
9704 CHELLS DR, ST LOUIS, MO 63134  
ED: 101

SIGNATURE CONFIRMATION

GO BACK DONE SIGNING

CLEAR SIGNATURE

*Martin Van Buren*

I swear that I am the person in the address above and am eligible to vote in this election.

### 4 VOTER SIGNATURE

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

State of New York  
New York Memorial Library

Martin Van Buren  
9704 CHELLS DR, ST LOUIS, MO 63134  
Election District 101 DOB: 12/05/1902  
Split 001 Voter ID: 76500018  
Status: ID Required

POLL WORKER CONFIRMATION

START OVER SUBMIT

CONFIRM THE ELECTOR'S INFORMATION

Signature on File

Signature on Election Day

Ballot Style: 101

☐ Challenge Voter ☐ Assistance Required

Initial

Initial

### 5 POLL WORKER CONFIRMATION

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

State of New York

Martin Van Buren  
Processed Successfully

Ballot Style 101 Group: 101 Subgroup: 001

Touch anywhere on the screen to continue.

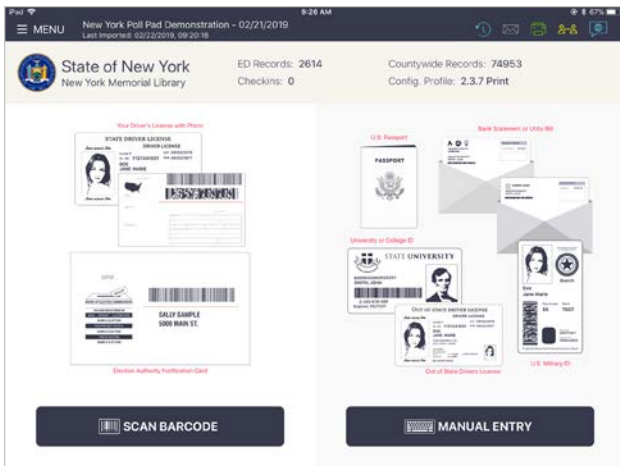
### 6 PROCESSED VOTER

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

# PROCESSING VOTERS | AFFIDAVIT BALLOT

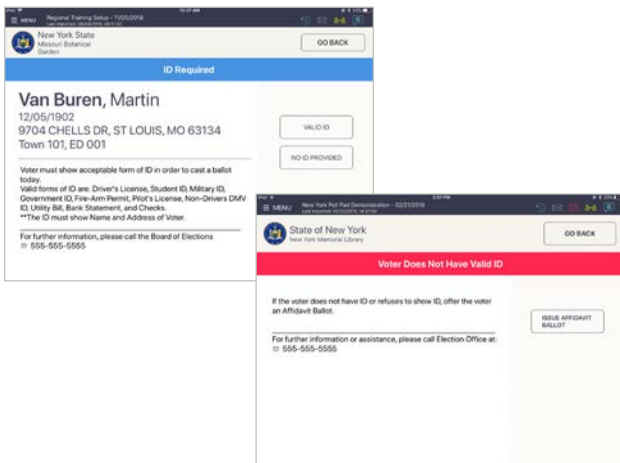
## 1 LOOK UP VOTER

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



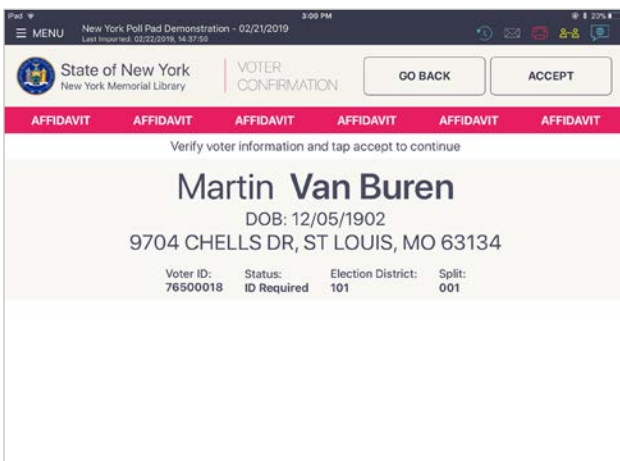
## 2 LOCATE VOTER'S RECORD AND READ PROMPT

A prompt will appear, follow written instructions to process by affidavit ballot press **ISSUE AFFIDAVIT BALLOT**.



## 3 FOLLOW PROMPT

An affidavit banner will appear across the top of the screen. Verify voter information and complete check-in process.

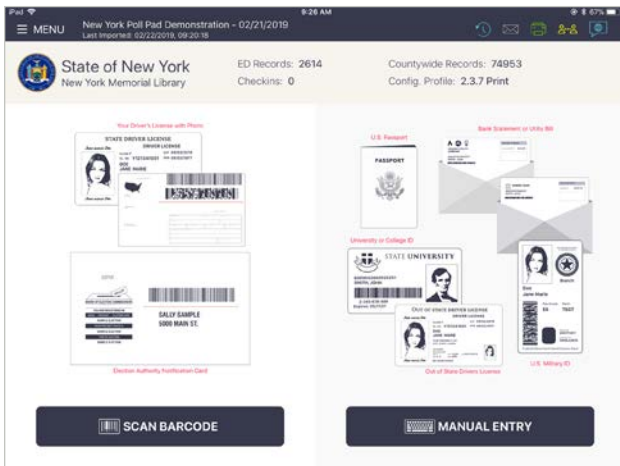




# PROCESSING VOTERS | INACTIVE VOTER

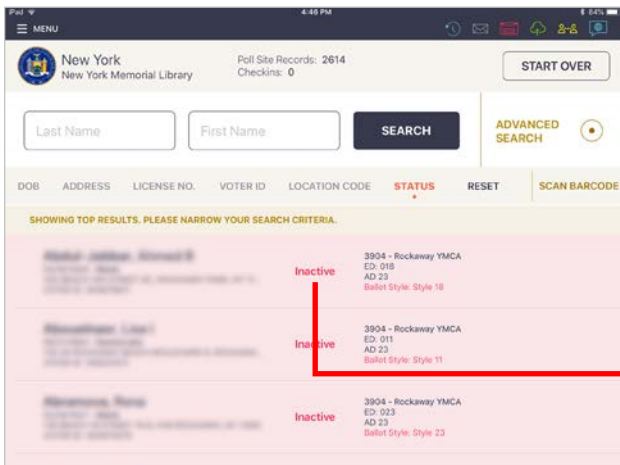
## 1 LOOK UP VOTER

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



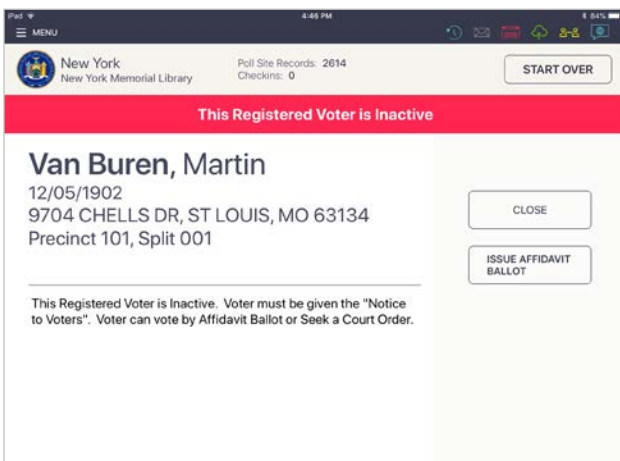
## 2 LOCATE VOTER'S RECORD AND READ PROMPT

Lookup the voter's record. You'll notice their record contains a status that reads "Inactive." Press voter record.



## 3 FOLLOW PROMPT

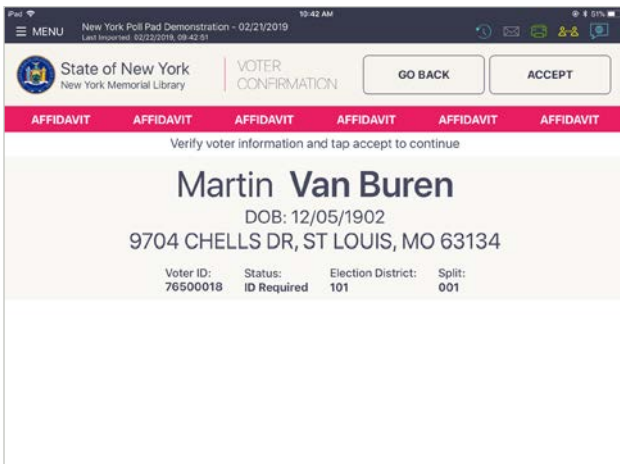
Read the instructions on the prompt and offer the voter an affidavit ballot.



## PROCESSING VOTERS | INACTIVE VOTER

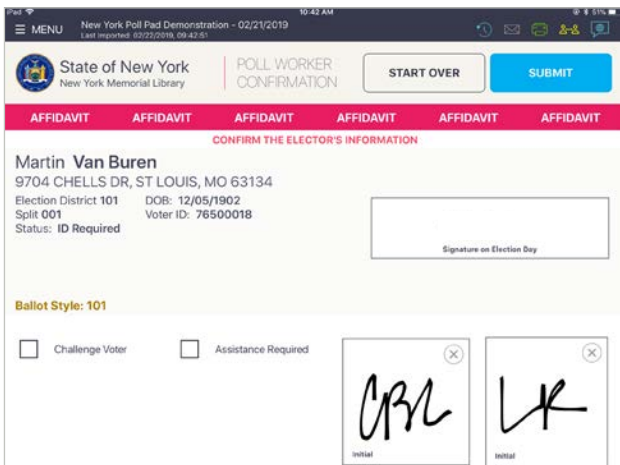
### 4 VOTER CONFIRMATION

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



### 5 POLL WORKER CONFIRMATION

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



### 6 PROCESSED VOTER

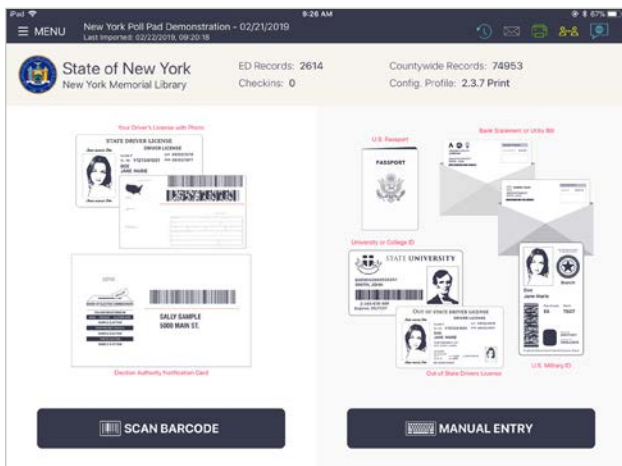
Good Job! You successfully processed the voter. Follow polling place protocol to direct voter to next polling station.



# PROCESSING VOTERS | WRONG LOCATION

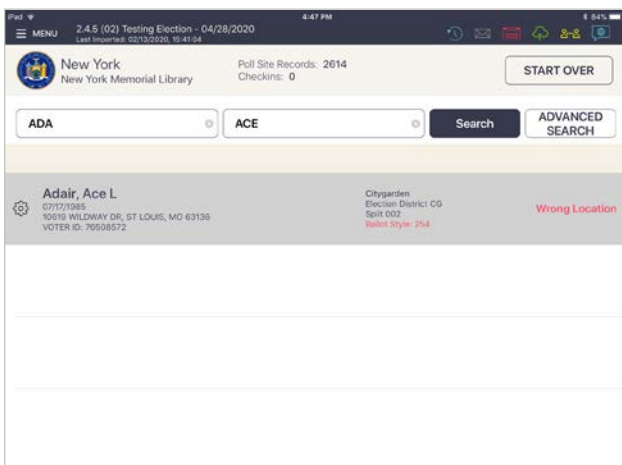
## 1 LOOKUP VOTER

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



## 2 LOCATE VOTER'S RECORD

If the voter is at the wrong polling location, their record will be highlighted in gray and contain a status that reads "Wrong Location." Touch voter record.



Wrong Location

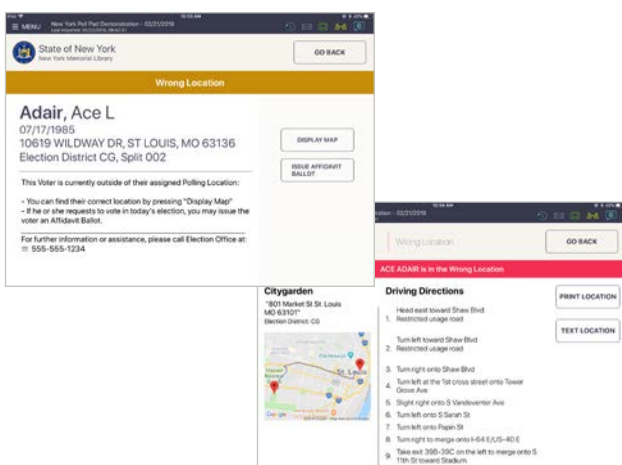
## 3 FOLLOW PROMPT

A popup will appear, follow written instructions.

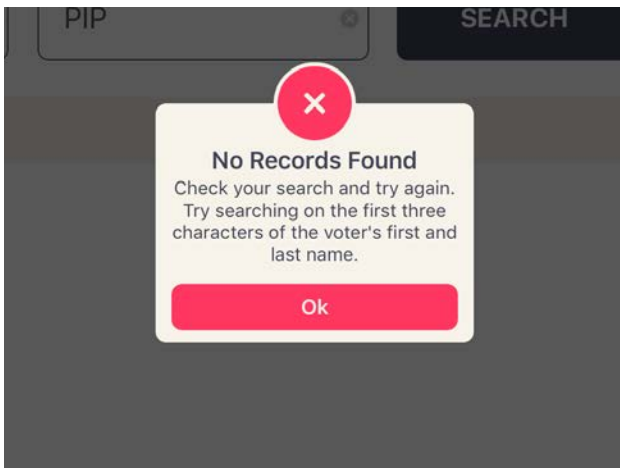
## 4 PROVIDE DIRECTIONS

A popup will appear reading, "(Voter's Name) is in the Wrong Location." Correct polling location name and address will be provided. Direct voter to correct polling location by Text or Print. Press **GO BACK** then **START OVER**.

**NOTE:** Mapping and Text features are only available if using connectivity in polling location.

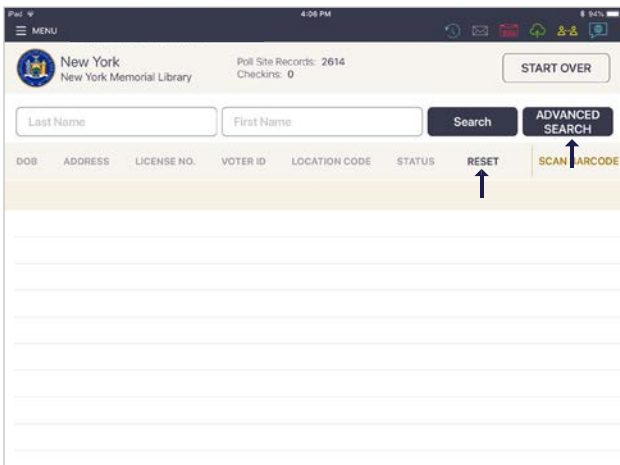


## PROCESSING VOTERS | **ADVANCED SEARCH**



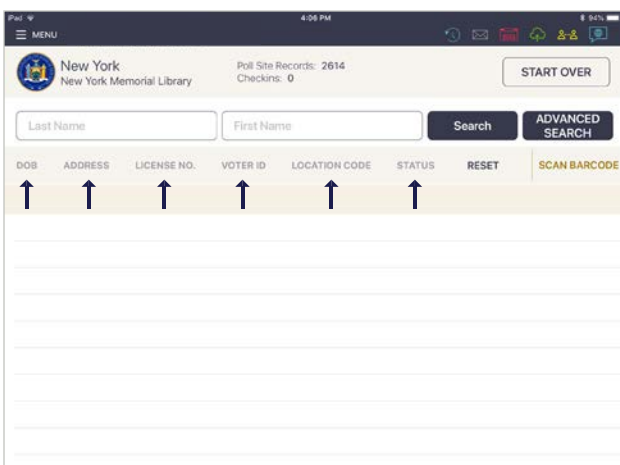
### 1 **VOTER NOT FOUND**

If Manual Entry has 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.



### 2 **ADVANCED SEARCH**

Once back on the Voter Lookup Screen, press **ADVANCED SEARCH**. When Advanced Search bar appears, press **RESET**.



### 3 **SEARCH BY:**

Lookup voter by 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 as manual entry to process voter.



# PROCESSING VOTERS

## VOTER REQUIRES ASSISTANCE / CHALLENGE

### 1 VOTER ASSISTANCE / CHALLENGE

If a voter requires assistance or is challenged, press either the Assistance Required box or Challenge Voter box found on the Poll Worker Confirmation page.

**NOTE:** For Assistance Required go to Step 2. For Challenge Voter go to Step 3.

Regional Training Setup - 11/05/2019  
Last Imported: 09/04/2019, 09:17:22

New York State  
Missouri Botanical Garden

POLL WORKER CONFIRMATION START OVER SUBMIT

CONFIRM THE VOTER'S INFORMATION

Martin Van Buren  
9704 CHELLS DR, ST LOUIS, MO 63134  
Town: 101 DOB: 12/05/1902  
ED: 001 Voter ID: 76500018  
Status: ID Required

Ballot Style: 101

☐ Challenge Voter ☐ Assistance Required

Signature on File  
Signature on Election Day

Initial Initial

☒ Challenge Voter ☒ Assistance Required

### 2 ASSISTANCE REQUIRED

Enter the assister's name and address. Instruct the assister to read the Assistance Required Oath and sign on the signature line. Once signed, poll worker presses **CONTINUE**. Poll worker to complete voter check-in process.

Assistance Required CONTINUE

Assister Name Assister Address

Instruct the assister to sign in the box below.

CHOOSE REASON

LISTEN TO OATH CLEAR SIGNATURE

CONTINUE

### 3 VOTER IS CHALLENGED

The Challenge Oath and Challenge Reason drop down box will appear on the screen. Choose the reason for the Challenge. Instruct voter to read Challenge Oath and have the voter sign on the signature line. Once signed, poll worker presses **CONTINUE**. Poll worker to complete voter check-in process.

Challenge Voter CONTINUE

Please Read and Sign  
Martin Van Buren  
12/05/1902 | 76500018  
9704 CHELLS DR, ST LOUIS, MO 63134

CHALLENGE REASON

LISTEN TO OATH CLEAR SIGNATURE

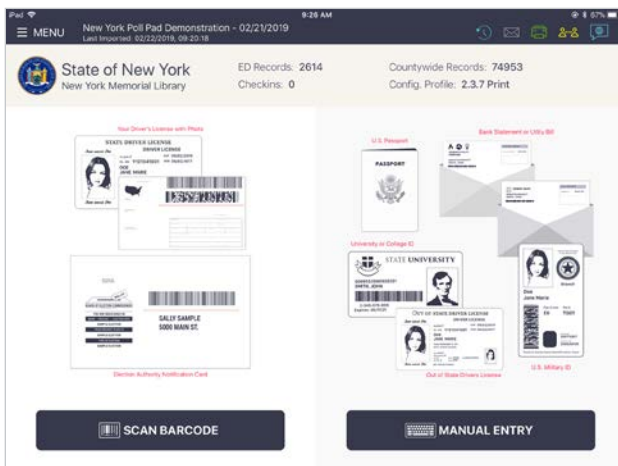
CONTINUE

# PROCESSING VOTERS

## SEARCH BY SCANNING VOTER NOTIFICATION CARD

### 1 VERIFY VOTER'S INFO

If the voter presents a Voter Notification Card, start the check-in process by touching **Scan Barcode**.



### 2 SCAN VOTER'S ID

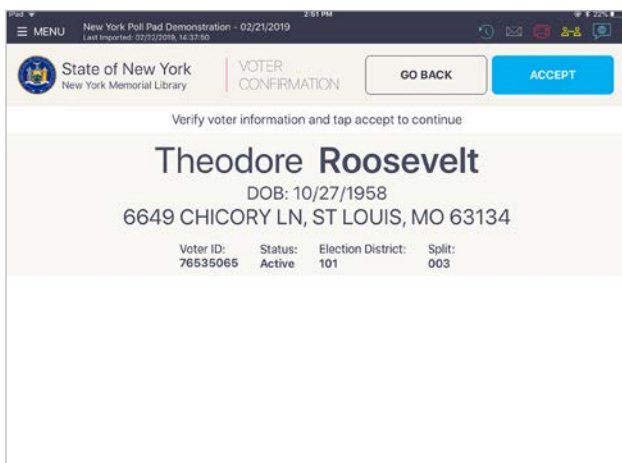
A live image of the Photo ID Tray displays on screen. Place his or her card (with the barcode facing the camera) onto the ID Tray.

**NOTE:** If the camera is unable to scan the voter's card or if it is not placed onto the holder 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

Verify information. If all is correct, press **ACCEPT** and continue the check-in process.



# PROCESSING VOTERS | SPOILED BALLOT

## 1 LOOK UP VOTER

Look up the voter's record. Once located you will notice the record is shaded green and is marked as **Voted**.

Press on the record and read the prompt in its entirety. To spoil ballot press **SPOIL BALLOT AND ENTER PASSWORD**.

**NOTE:** Password is 1234

The screenshot shows a mobile application interface for voter lookup. At the top, there's a header with 'New York State' and 'Missouri Botanical Garden'. Below that, a search bar contains the name 'Roosevelt, Franklin'. The search results show a green-shaded record for Franklin Roosevelt, born 10/12/1922, at 9790 CHELLS DR, ST LOUIS, MO 63134, ED 101, AD 001. The record is marked as 'Voted'. Below the record, there's a prompt: 'This voter is shown as being processed. If the voter insists he or she did not already vote, you may issue an Affidavit Ballot.' To the right of the record, there are two buttons: 'ISSUE AFFIDAVIT BALLOT' and '\*\*SPOIL BALLOT'. A yellow arrow points to the '\*\*SPOIL BALLOT' button.

## 2 SELECT SPOIL BALLOT

Banner will read **Spoil Ballot**. Choose the ballot(s) to spoil. Choose reason to spoil (Ex. Voter Error).

**NOTE:** You will notice Spoiled Ballots Remaining Count will decrease for each ballot that is spoiled. Maximum number is 3.

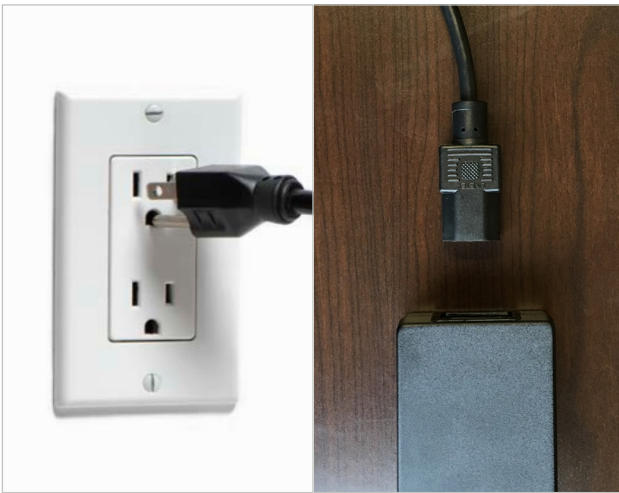
The screenshot shows the 'Spoil Ballot' screen. At the top, there's a red banner with the text 'Spoil Ballot'. Below the banner, the voter's name and address are displayed: 'Roosevelt, Franklin', '9790 CHELLS DR, ST LOUIS, MO 63134'. Below that, there's a section titled 'Choose the ballot(s) to spoil:' with a button labeled '101'. To the right of this section, there's a 'Choose Reason' section with a button labeled 'Voter Error'. Below the 'Choose the ballot(s) to spoil:' section, there's a section titled 'Spoiled Ballots Remaining:' with a count of '101 ballot style: 2'. A yellow arrow points to the '101' button.

## 3 SPOIL BALLOT

Press **SPOIL BALLOT** to complete the process.

The screenshot shows the 'Spoil Ballot' screen. At the top, there's a red banner with the text 'Spoil Ballot'. Below the banner, the voter's name and address are displayed: 'Roosevelt, Franklin', '9790 CHELLS DR, ST LOUIS, MO 63134'. Below that, there's a section titled 'Choose the ballot(s) to spoil:' with a button labeled '101'. To the right of this section, there's a 'Choose Reason' section with a button labeled 'Voter Error'. Below the 'Choose the ballot(s) to spoil:' section, there's a section titled 'Spoiled Ballots Remaining:' with a count of '101 ballot style: 2'. A yellow arrow points to the 'SPOIL BALLOT' button at the top right of the screen.

# CLOSING PROCEDURES



### POWER OFF & UNPLUG PRINTER (IF USING A PRINTER)

Power off the printer and unplug from outlet, disconnect printer cable from transformer box and printer.

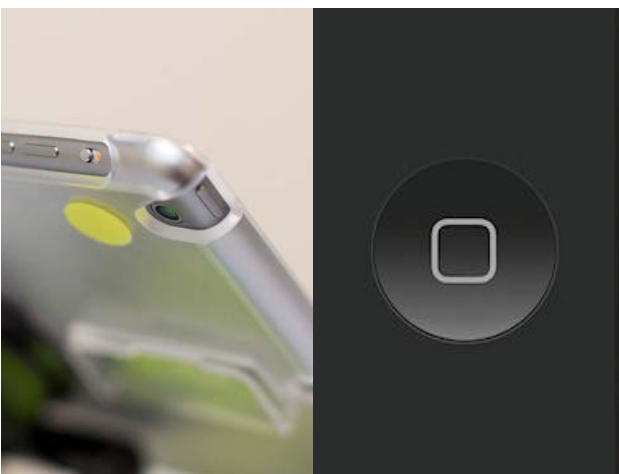
**NOTE:** Keep Poll Pad powered ON



### FOLD STAND ARM

After disconnecting hardware from the Poll Pad, place components back in carrying case. Once the stand arm has been removed from the Poll Pad and stand base, fold the stand arm backwards to fit in the case.

**NOTE:** Keep Poll Pad powered ON



### POWER OFF POLL PAD

Turn off Poll Pad by holding the power button and the home button (pictured) simultaneously until the screen goes black. Place Poll Pad in the carrying case.



### PACK POLL PAD CASE (With Printer)



Disassemble the Poll Pad and return the supplies to the Poll Pad case.

Close the lid and secure.

- ① Green Case
- ② Poll Pad
- ③ Poll Pad Base
- ④ Power Cube and Cord
- ⑤ (2) Stylus
- ⑥ Photo ID Tray
- ⑦ Poll Pad Screen Cloth
- ⑧ Printer (and Cords)
- ⑨ Stand Arm

### PACK POLL PAD CASE (Without Printer)



Disassemble the Poll Pad and return the supplies to the Poll Pad Case.

Close the lid and secure.

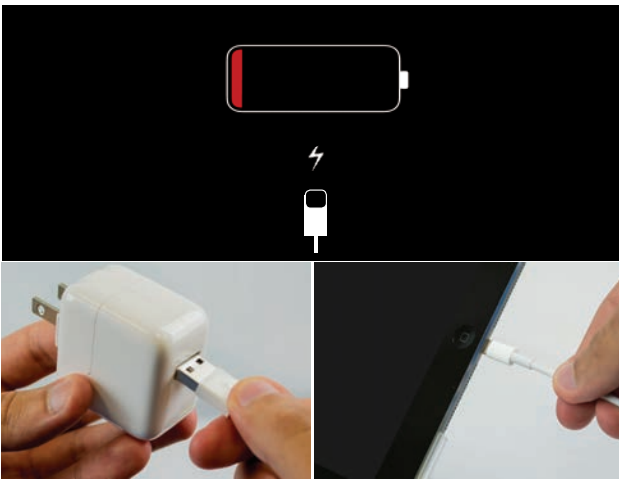
- ① Green Case
- ② Poll Pad
- ③ Poll Pad Base
- ④ Power Cube and Cord
- ⑤ (2) Stylus
- ⑥ Photo ID Tray
- ⑦ iPad Screen Cloth
- ⑧ Stand Arm

## RETURN SUPPLIES

Return Poll Pad case to the Election's office on election night, along with other precinct supplies.

**NOTE:** To ensure accuracy, remember to place the Poll Pad supplies in the appropriate case/tote.

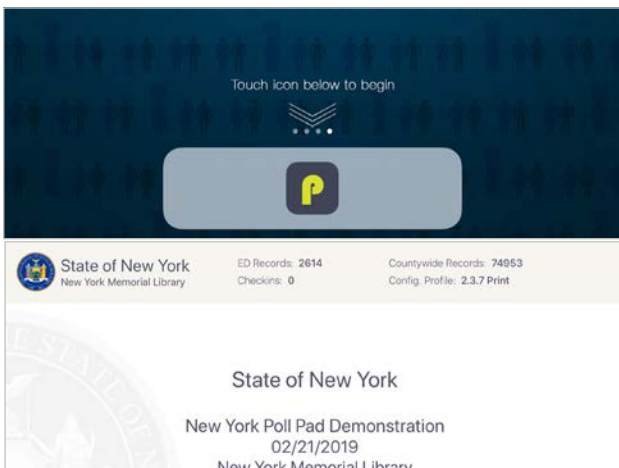
## HELP DESK



### CHARGING POLL PAD

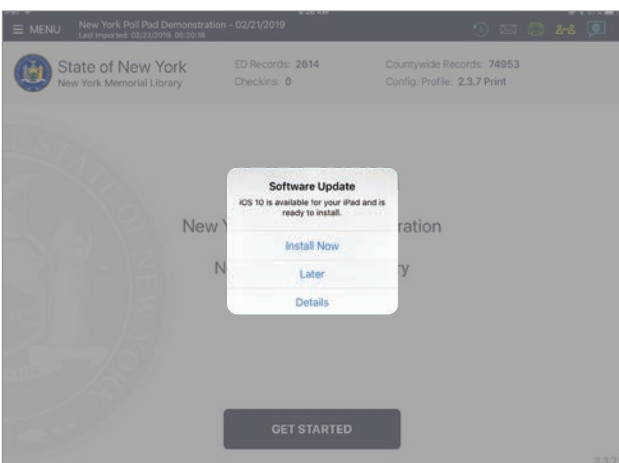
- 1 Plug USB end of power cable into power cube
- 2 Plug power cube into an AC wall outlet
- 3 Plug power cable into Lightning Connector on Poll Pad
- 4 Wait about five minutes for the Poll Pad to charge
- 5 Once there is sufficient power, Poll Pad will auto power on
- 6 Resume normal operations

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



### OPENING POLL PAD

- 1 If application does not automatically launch when powered on, touch the Poll Pad App at the bottom of the Home Screen
- 2 Verify the correct 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:

- 1 Touch Later from the list of on screen options
- 2 Press the Home button and verify Poll Pad app remains open

## HELP DESK



### POLL PAD SCREEN IS UNRESPONSIVE

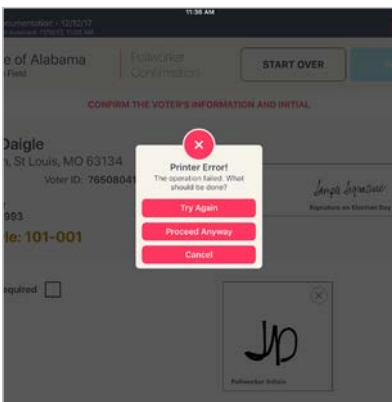
❶ Unplug unit from power source (electrical outlet, battery, etc.)

**If the Poll Pad screen is unresponsive, perform the following steps:**

❷ Hold down the Sleep/Wake and Home buttons simultaneously

❸ Release both buttons once the Apple logo displays on screen

❹ After application launches, return to previous activity



### NOT PRINTING / STOPS PRINTING (IF USING A PRINTER)

❶ Make sure the printer is turned 'ON'

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

❸ Check paper is installed correctly

❹ Confirm connection with Poll Pad (green icon)

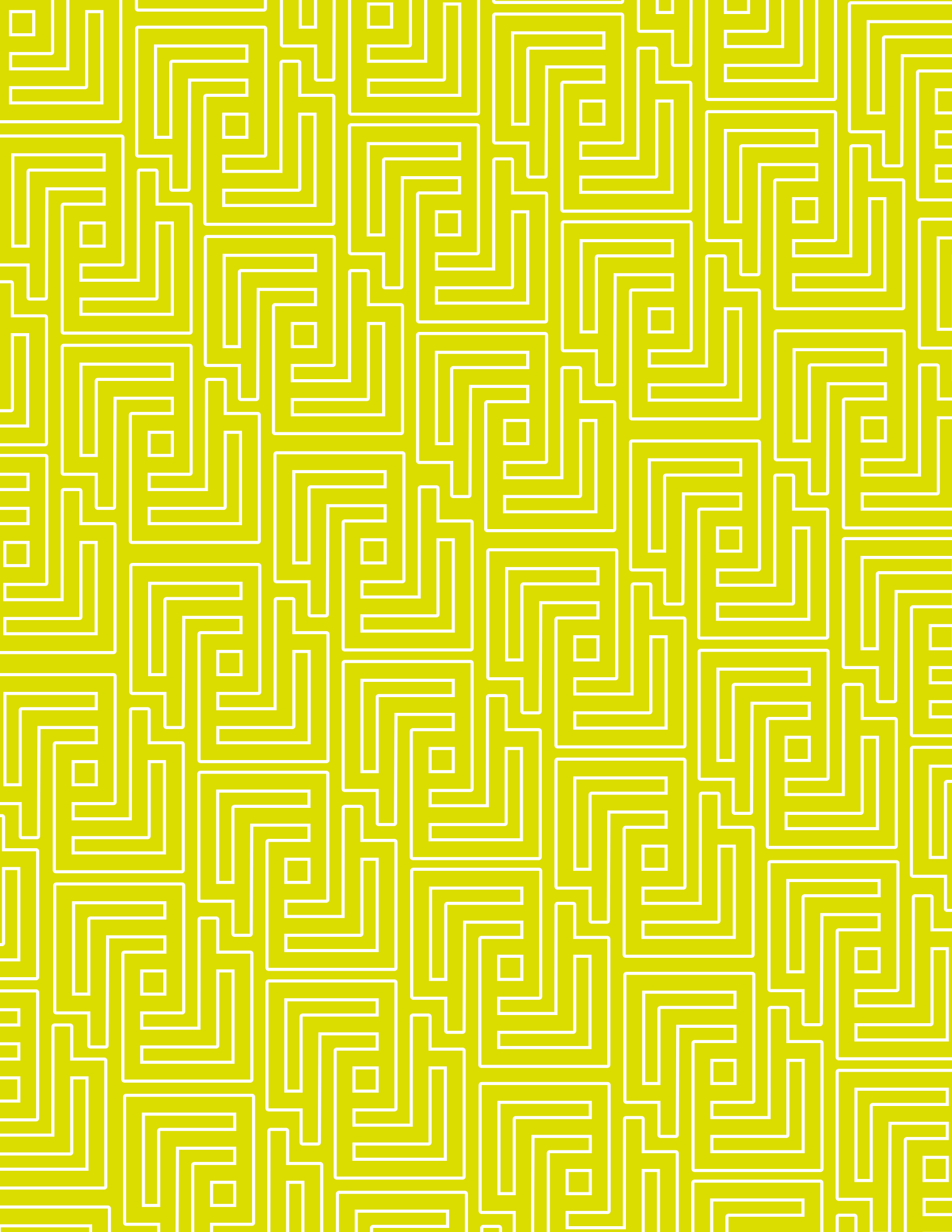


### CHANGING PAPER (IF USING A PRINTER)

❶ Open printer

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

❸ Close and Print Test Receipt



ELECTION DAY | **POLL PAD GUIDE** | THE STATE OF NEW YORK

