

Precinct Atlas Tutorial

Training for precinct election officials

Purpose. The purpose of this tutorial is to assist county auditors in training precinct election officials in the use of the Precinct Atlas software and system. It is not intended to replace training that is developed by any individual county auditor, and county auditors are encouraged to modify this tutorial or develop their own training models with customized voter lists, street tables, polling places, and voter situations from their own counties.

Small groups. Although training is more efficient as a group process, learning is an individual one, and training should be conducted in small groups as much as possible. Precinct officials should work individually or in a two-person team at a laptop. The trainer, a staff person, or a trained precinct official is recommended to be available to work with the one or two precinct official at each laptop workstation following the initial demonstration.

Setup. Each laptop should: 1) be loaded with the software and election data; 2) have a label printer attached by a USB connection; and 3) be equipped with a hand-held mouse and mouse pad. A set of forms prescribed by the Iowa Secretary of State and printed on specific colors and sizes of paper must be accessible to the precinct officials. The training area should be free from interruptions and distractions during the training session, which should take two to three hours. Prior to the session the trainer should test that each label printer is correctly installed and functioning, and should prepare and print the Declaration of Eligibility forms and examples of ID necessary to role play the various voter situations. The trainer should also work through each voter situation that will be used in the session, to be knowledgeable and to confirm that the setup is complete and ready.

Initial demonstration. The trainer should demonstrate the system by processing the first three voters, describing the main screens and voting process for a “regular voter”; one who is pre-registered to vote, whose voter registration information is accurate and up-to-date, who did not request an absentee ballot, and who is voting in the correct precinct. The trainer should give instructions on conducting voter and address searches, and show the Declaration of Eligibility form.

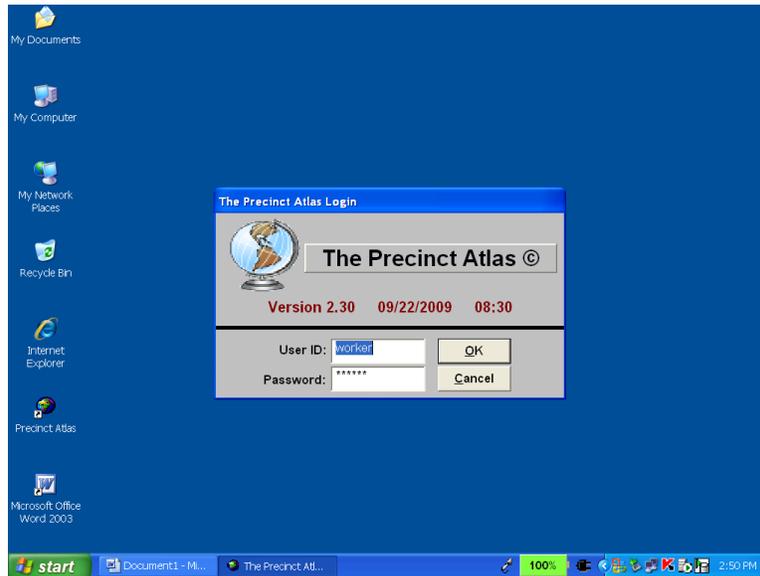
Hands-on. After the initial demonstration, training should consist of hands-on use of the system by the precinct officials processing a series of voter situations. The trainer should try to use the voter situations in order, as the lessons are sequential and tend to build on prior lessons. The trainer is encouraged to take the precinct officials through as many voter situations as possible; however, some of the lessons in the later situations can be combined or summarized in order to compress the training time. The more voters a precinct official has processed, the greater comfort and confidence they will have in the system and their ability to use it.

Role play. In the first three voter situations the trainer should role play with the precinct officials with the trainer acting as the precinct official and the person being trained acting as the voter. In the subsequent voter situations the roles should be reversed. The benefit of role-playing is that the precinct officials place themselves into the process mentally. The trainer should avoid the use of technical terms and acronyms such as “EDR”, and should instead use everyday language to make the system understandable and meaningful to the precinct officials.

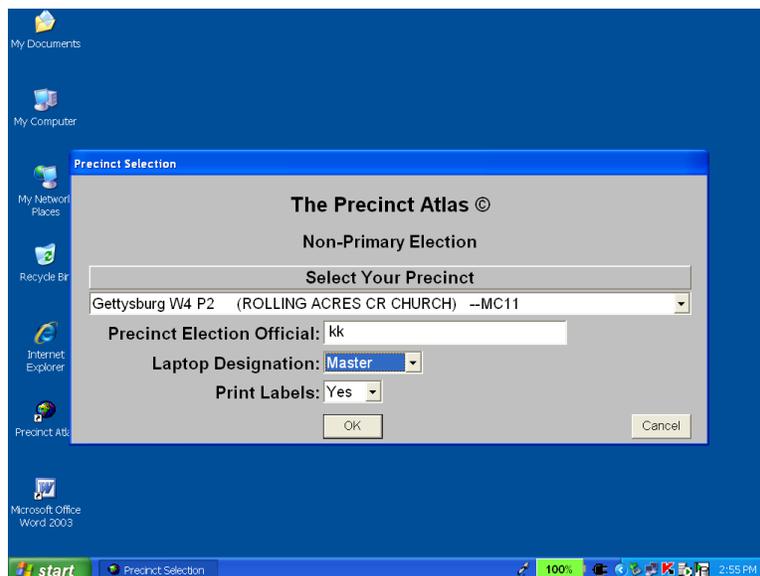
Positive reinforcement. Precinct officials will have different levels of experience working at elections and with computers. Not everyone will initially be good at using the laptop, but the trainer should offer sincere praise to each precinct official as much as possible.

Login

While on the desktop screen and with the precinct officials watching, the trainer should open the program by double-clicking on the Precinct Atlas icon. The program will launch with the defaults for the User ID as “worker”, and the default password as “worker”.

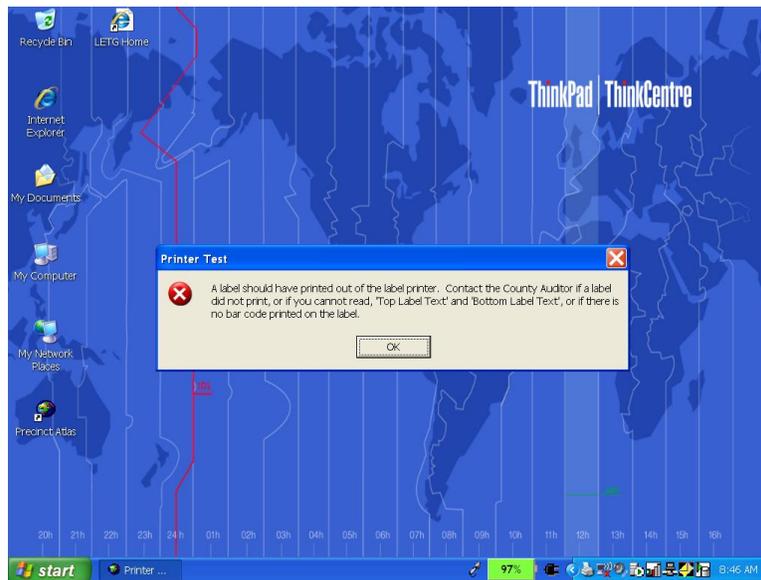


Click the “OK” button



In the first field, select the precinct that you will be using for the training
Gettysburg W4 P2 (Rolling Acres CR Church) --MC11
Under Precinct Election Official, type the trainer’s name or initials
Under Laptop Designation, select “Master” from the drop-down box
Under Print Labels, select “Yes”
Click the “OK” button

The screen will look similar to below.



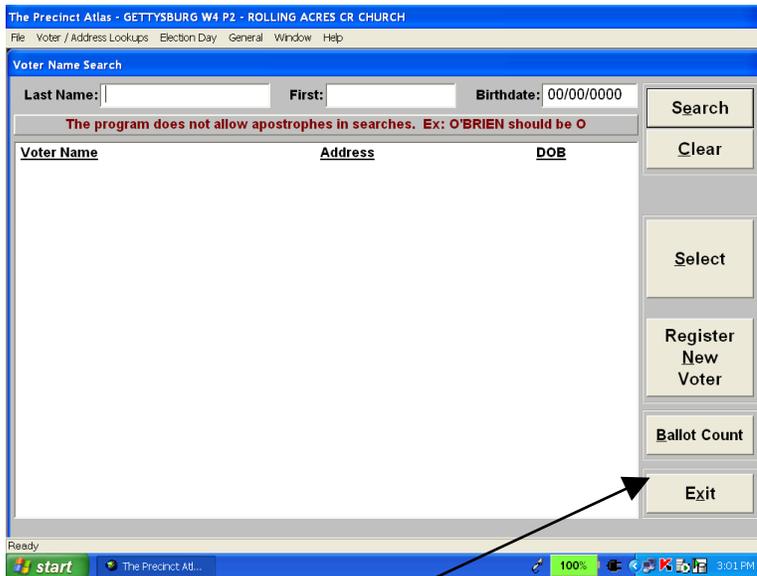
If the label printer is correctly set up and attached, a label should have printed as shown below.



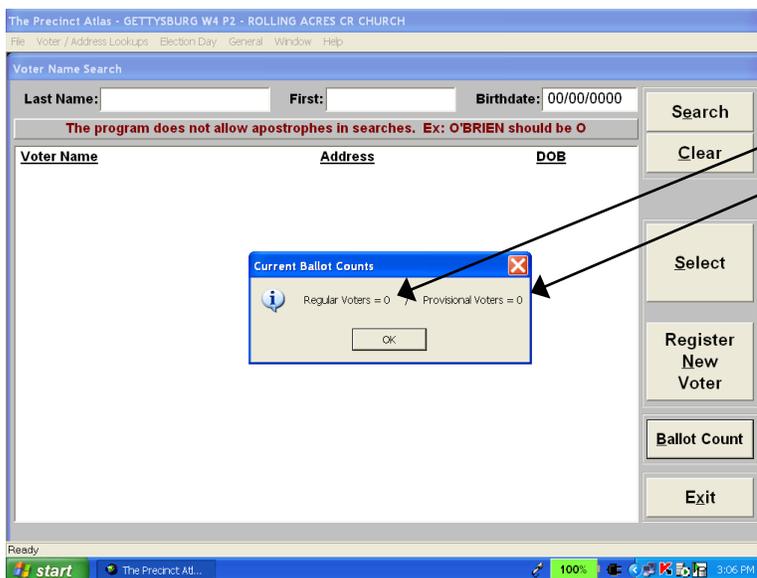
The purpose of this label is to confirm that the printer is correctly installed. If your label looks like the above label, throw it away (or put it where the county auditor has instructed you).

Click the OK button

You are now on the Voter Name Search screen, shown below.



Click the Ballot Count button



These should be zero at the beginning of the training session.

Tell the precinct officials:

- Both regular and provisional numbers should be zero at the beginning of the day
- On Election Day you can compare the number of voters (Regular Voters) with the number of ballots in the ballot scanner by clicking the Ballot Count button on this screen
- Compare the ballot count periodically throughout the day (not every voter)
- The number of voters prints automatically on the Declaration of Eligibility slip; however, it may be unreliable if two laptops are being used at a precinct
- The Ballot Count button should always give accurate counts

Searching for a voter by name

Preferred method to search

- If haven't already done so, click the Clear button to clear the data from the screen and to make the cursor active in the Last Name field
- Keep your hands on the keyboard and do not use the mouse
- Type three letters of the voter's last name
- Press Tab on the keyboard
- Type one letter of the voter's first name
- Press Enter on the keyboard

Why

- For most voters, three letters of the last name and one letter of the first name are sufficient to find the voter
- The more you type, the more time it takes, and the more likely you are to misspell the voter's name
- Using the mouse to click between fields takes unnecessary time to find the mouse with your hand and to find the cursor with your eye
- The voter may sign the Declaration of Eligibility slip "Jim" but be registered as "James"; or may sign "Mike" and be registered as "Michael"
- If you have a common name or get too many search results, you can add one or more letters

Voter situation #1 – Floyd Adams

The goals in this voter situation are to:

- Introduce the Declaration of Eligibility form and label
- Introduce the seven screens used for the 80% to 95% of the voters who are “regular voters”; those who are already registered and in the correct precinct, whose voter registration information is accurate and current, whose status is “Active”, and who did not request absentee ballots
- Train to click the Forward button to proceed on most screens
- Demonstrate the Back button
- Train to click the Clear button after finishing with a voter
- Show how to tear off the label from the label printer

Show the voter’s Declaration of Eligibility form to the precinct officials; explain that the voter will fill out the form upon arriving at the precinct, and then bring it to the precinct official at the laptop

Search for Floyd Adams by typing ADA in the Last Name field, pressing Tab on the keyboard, typing F in the First Name Field, and pressing Enter on the keyboard

The screenshot shows the 'Voter Name Search' window in 'The Precinct Atlas' software. The window title is 'The Precinct Atlas - GETTYSBURG W4 P2 - ROLLING ACRES CR CHURCH'. The search criteria are: Last Name: ADA, First: F, Birthdate: 00/00/0000. A red error message states: 'The program does not allow apostrophes in searches. Ex: O'BRIEN should be O'. The search results table is as follows:

Voter Name	Address	DOB
ADAMS, FLOYD E	413 23RD ST SW	05/09/1949
ADAMS, FRANK B	1014 15TH ST SE	01/08/1949

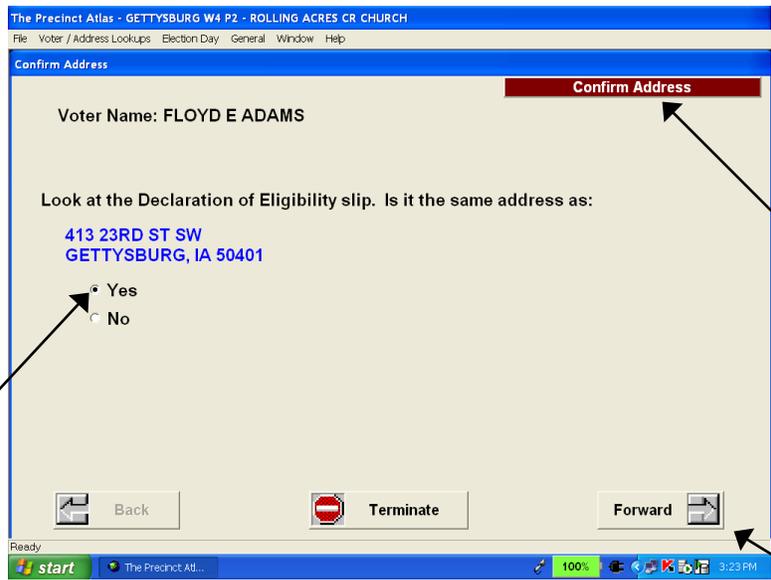
Annotations in the image include: 'Type ADA in the Last Name field' pointing to the 'Last Name' input field; 'Type F in the First Name field' pointing to the 'First' input field; and a blue highlight bar under the first row of the search results table.

Blue highlight bar shows which voter will be selected

Tell the precinct officials that out of the 32,000 voters in the sample database, only two match the search criteria you typed, and that it usually doesn't take much information to limit the search results and find the right voter

Click the Select button (or double-click on the voter)

You are now on the Confirm Address screen, which should look like the screen below



Screen name

Forward button

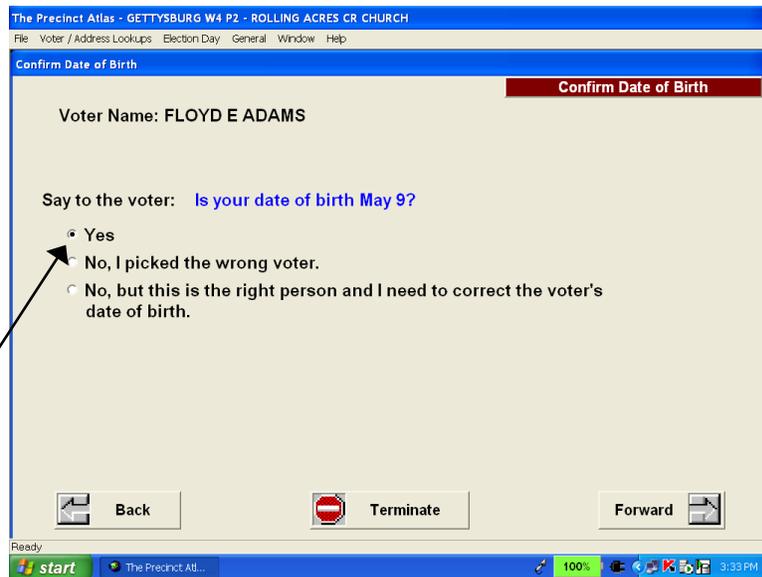
The default on this screen is Yes

You can change it to No by clicking on the radio button or on the word No

Once you have made the appropriate selection (Yes, in this voter situation), click the Forward button

The Back button is grayed-out on this screen; once you start working with a voter, there are three possible outcomes: 1) the voter casts a regular ballot; 2) the voter casts a provisional ballot; or, 3) the voter leaves the precinct without voting and you terminate working with the voter

You are now on the Confirm Date of Birth screen, which should look like the screen below



The default on this screen is Yes

You can change it to one of the other choices by clicking on the correct radio button or wording

The main purpose of this screen is to check whether you selected the correct voter
(the year is not included so as to avoid possible embarrassment on the part of the voter)

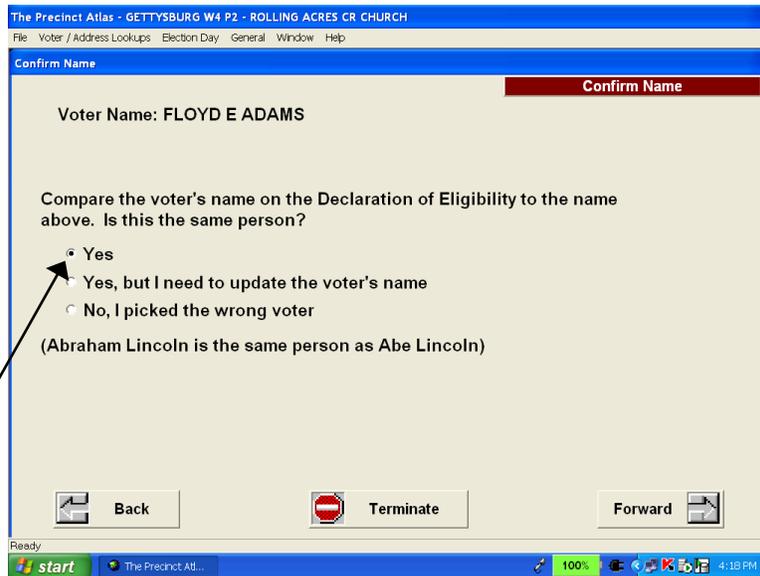
On this screen, begin role-playing with one of the people you are training and ask,

“Is your date of birth May 9th?”

You are acting in the role of the precinct official and the person being trained is acting in the role of the voter

Once you have made the appropriate selection (Yes in this voter situation), click the Forward button

You are now on the Confirm Name screen, which should look like the screen below



The default on this screen is Yes

You can change it to one of the other choices by clicking on the correct radio button or wording

The question you are trying to answer with this screen is, "Have I selected the right person?"

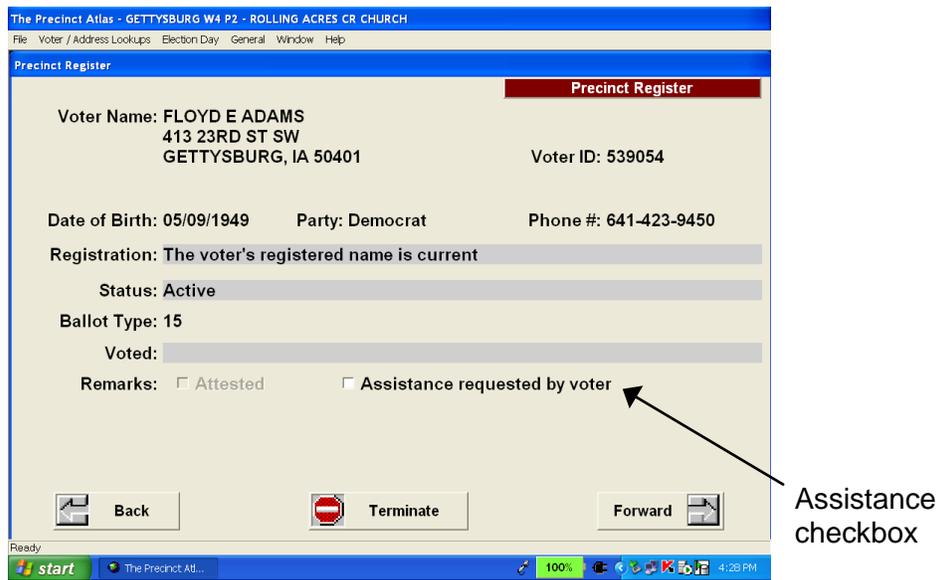
The voter's name may be slightly different on the Declaration of Eligibility form from the voter's registration record (for example, Mike versus Michael)

If the voter has had a change of name, then click on the second radio button

If you realize at this point that you have selected the wrong voter, click on the third radio button, and the program will take you through a termination procedure

Once you are ready to proceed, click the Forward button

You are now on the Precinct Register screen, which should look like the screen below



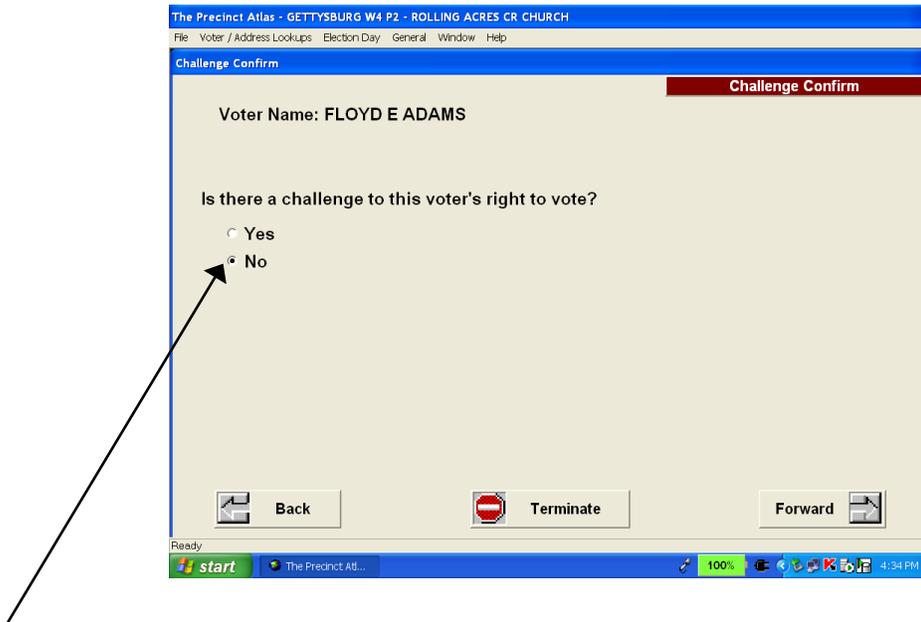
The Precinct Register screen is usually informational only

If there is an issue with this voter, such as the voter requested an absentee ballot or the voter's status is "Inactive-ID Required", this screen will tell you so

The only thing you can ever change on the Precinct Register screen is to record that the voter requested assistance in reading or marking the ballot

You generally will look at this screen quickly, then click the Forward button

You are now on the Challenge Confirm screen, which should look like the screen below



The default on this screen is No

You can change it to Yes by clicking on the radio button or on the word Yes

Iowa law allows any registered voter in the county to challenge another voter's right to vote

The challenge must be based on one of the legal reasons to challenge

A challenge is relatively uncommon; that is why the default on this screen is "No"

If there is a challenge, click the "Yes" button, and you will proceed to offer the voter a provisional ballot

Back button

Say to the people being trained, "I don't know if I looked at the voter's address correctly. What do you think I should do?"

The answer you hope to receive is to click the Back button

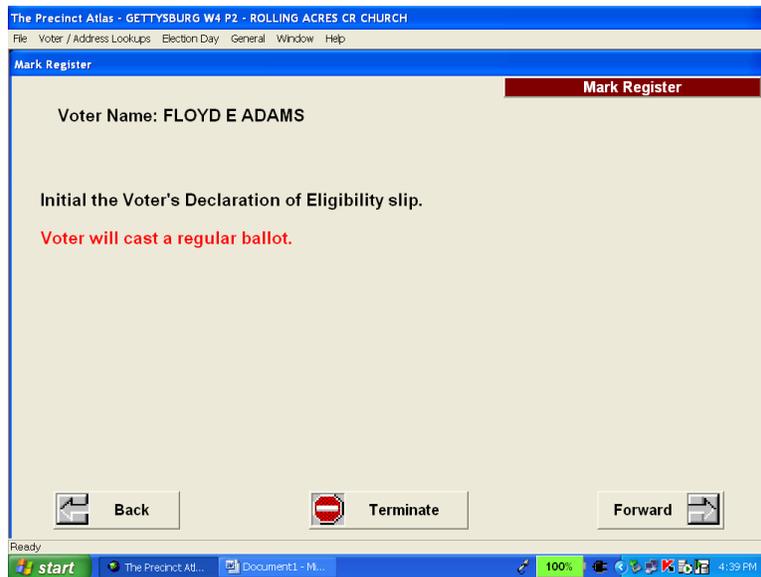
Click the Back button repeatedly until you come to the Confirm address screen

Sometimes the Back button is grayed-out; this means you will not be able to go back from the screen you are on

Click the Forward button until you are back on the Challenge Confirm screen shown above

Once you are ready to proceed, click the Forward button

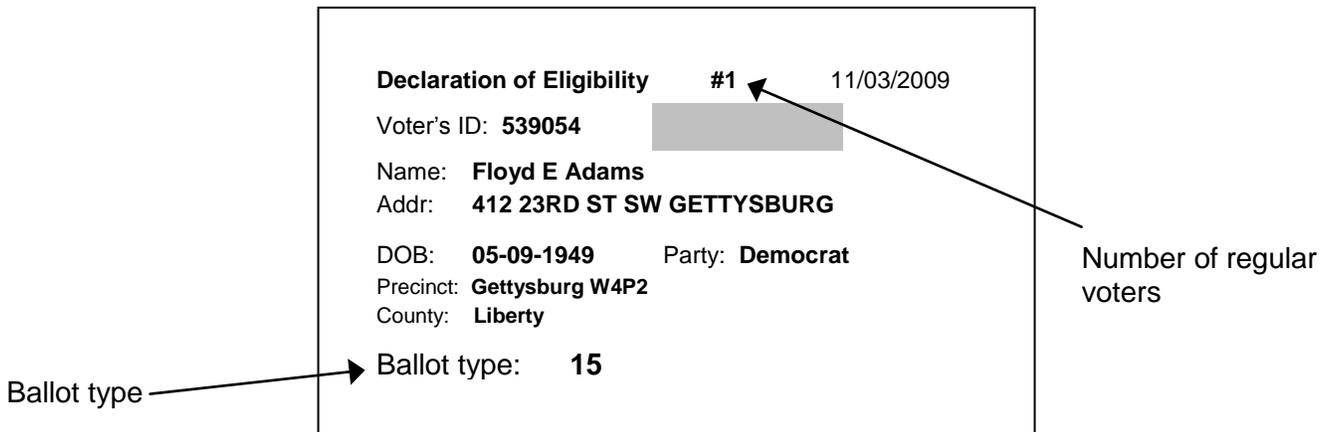
You are now on the Mark Register screen, which should look like the screen below



This screen tells you the voter will cast regular ballot, and instructs you to initial the voter's Declaration of Eligibility

Click the Forward button

A label will print out of the label printer and look like the label below



Show the precinct officials how to tear off the label by tearing down at an angle
Peel off the label and stick it on the top half of the voter's Declaration of Eligibility
Role-play by saying, "Take this over to Margaret, and she will give you a ballot"

You are now back on the Voter Name Search screen

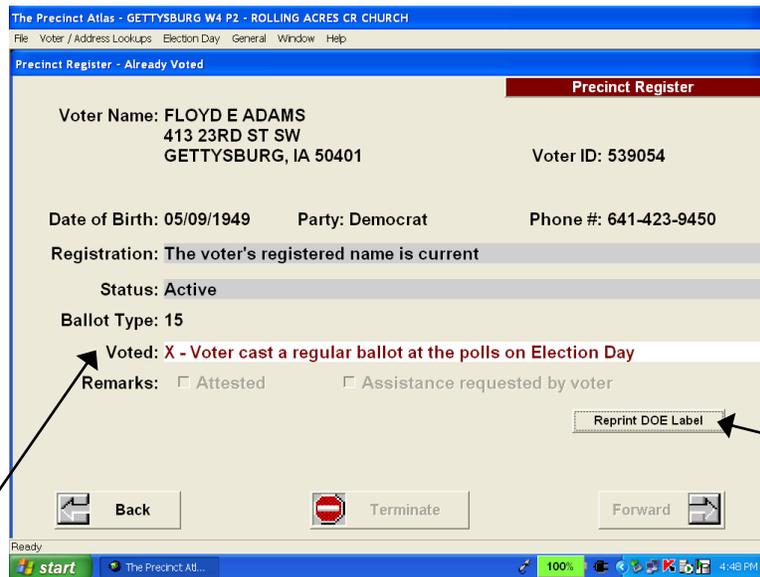
Before clicking the Clear button, click the Ballot Count button

You should see 1 Regular Ballot and 0 Provisional Ballots

Close the Ballot Count window

Select the same voter as before, Floyd E Adams by double-clicking on the voter's name or by clicking the Select button

You are now on the Mark Register screen for this voter, which should look like the screen below



Reprint label

Under Voted, you can see that the register is marked with an "X" to show the voter cast a regular ballot

This screen is usually informational only

If the voter's Declaration of Eligibility label was unreadable for some reason, you can click the "Reprint DOE label" button

Click the Back button

Clear button

When you are back on the Voter Name Search screen, click the Clear button

Clicking the Clear button will clear the search screen of search criteria and search results

It will also put the curser in an active mode in the Last Name field to be ready for the next voter

It is always a good idea to click the Clear button after finishing with a voter

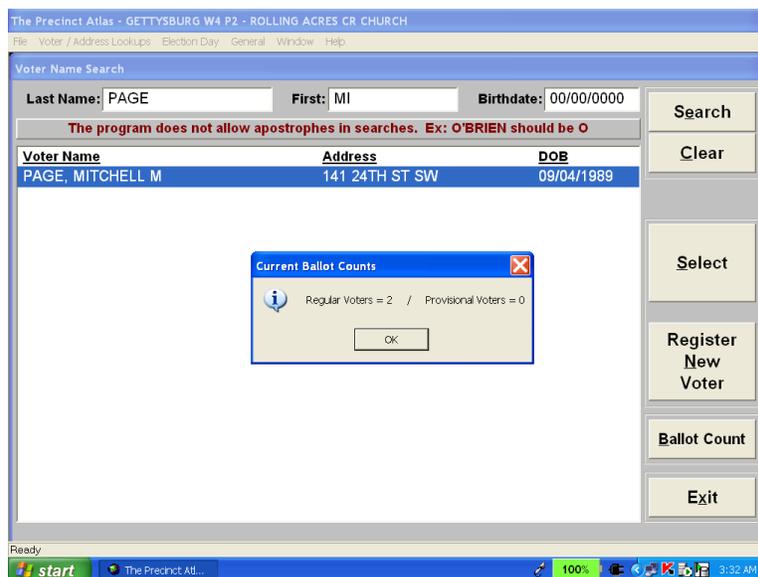
Voter situation #2 – Mitchell Page

The goal in this voter situation is to:

- Demonstrate the speed of processing a regular voter, once the precinct official is familiar with the main screens and the process
- 80% to 95% of the voters are regular voters, those who are already registered, whose voter registration information is current, who did not request an absentee ballot, and who are in the correct precinct
- When a precinct official has processed many voters, they know what the screens will ask them and become faster in working with voters
- Show the Ballot Count button with a count of regular voters

Ballot Count button

When you are done working with Mitchell Page, click the Ballot Count button; your screen should look like the one below



Remind the precinct officials that they should match the Regular Voters count against the number of ballots in the ballot scanner periodically throughout the day (not every voter)

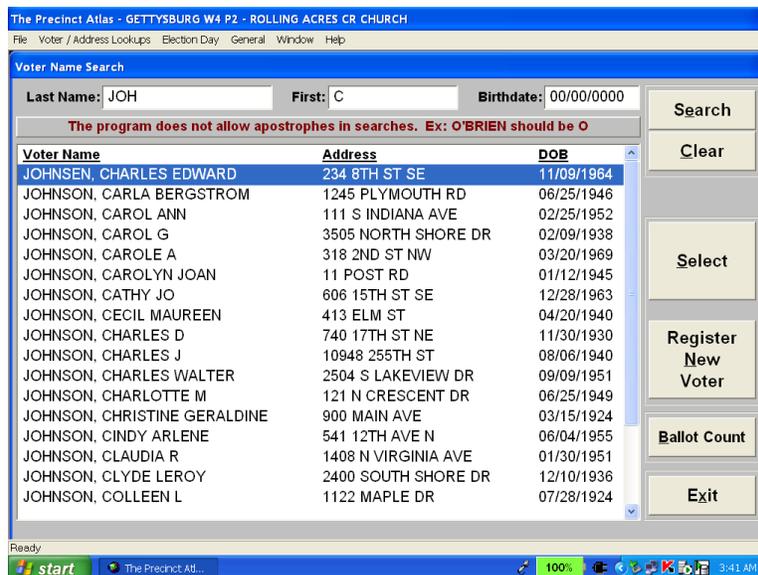
Voter situation #3 – Clay Johnson

The goal in this voter situation is to:

- Introduce the method of registering a voter at the polls
- Demonstrate how to narrow search results by adding one or more letters
- Train how to search for an address
- Demonstrate the termination procedure

Search for Clay Johnson by typing JOH in the Last Name field, press Tab on the keyboard, type C in the First Name field, and press Enter on the keyboard

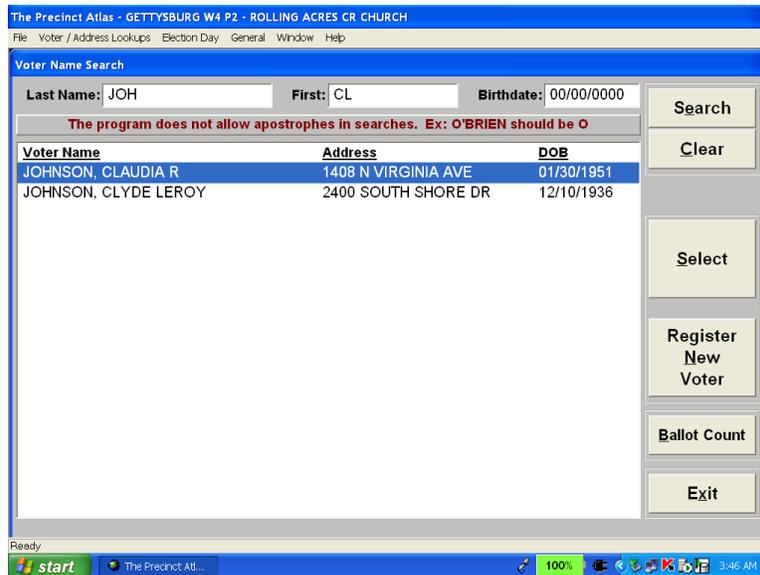
The screen should look like the screen below



Say to the precinct officials, “When you have a common name such as Johnson and you get a lot of names returned, add a letter or letters to narrow the results”

Click in the First Name field after letter “C”, type the letter L, and click the Search button

The Voter Name Search screen should look like the screen below



In this example, it only took one more letter to reduce the number of returned voters to only two

Registering a voter at the polls

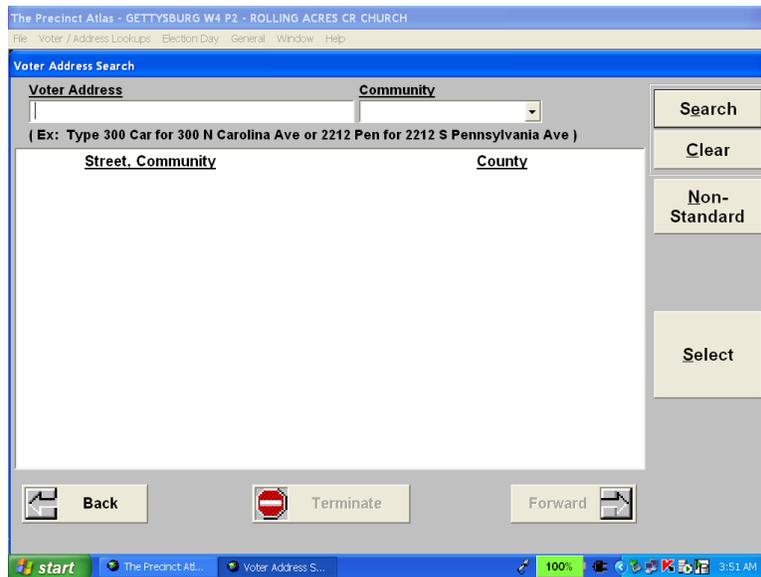
Role-play by saying, "It doesn't look like we have you registered, Clay"

Ask the precinct officials what they think they should do when a person is not pre-registered to vote

The answer is to click the Register New Voter button

Do so now

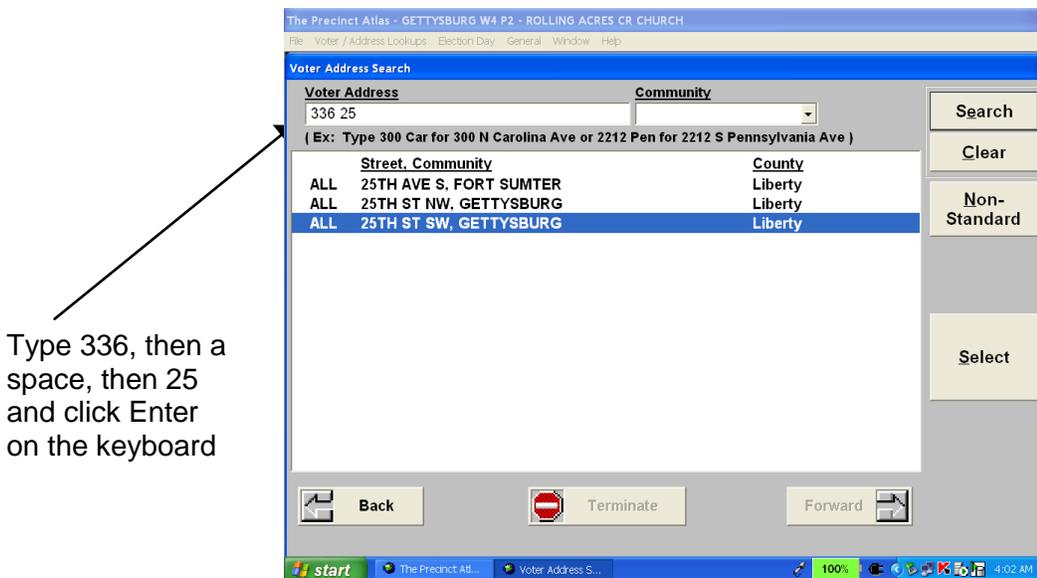
You are now on the Voter Address Search screen, which should look like the screen below



Searching for an address

- Less is better; type the house number, one space, and part of the street name
- Generally, leave the Community field blank
- Avoid directionals, such as North, N, N., No., and suffixes, such as Street, ST, St.

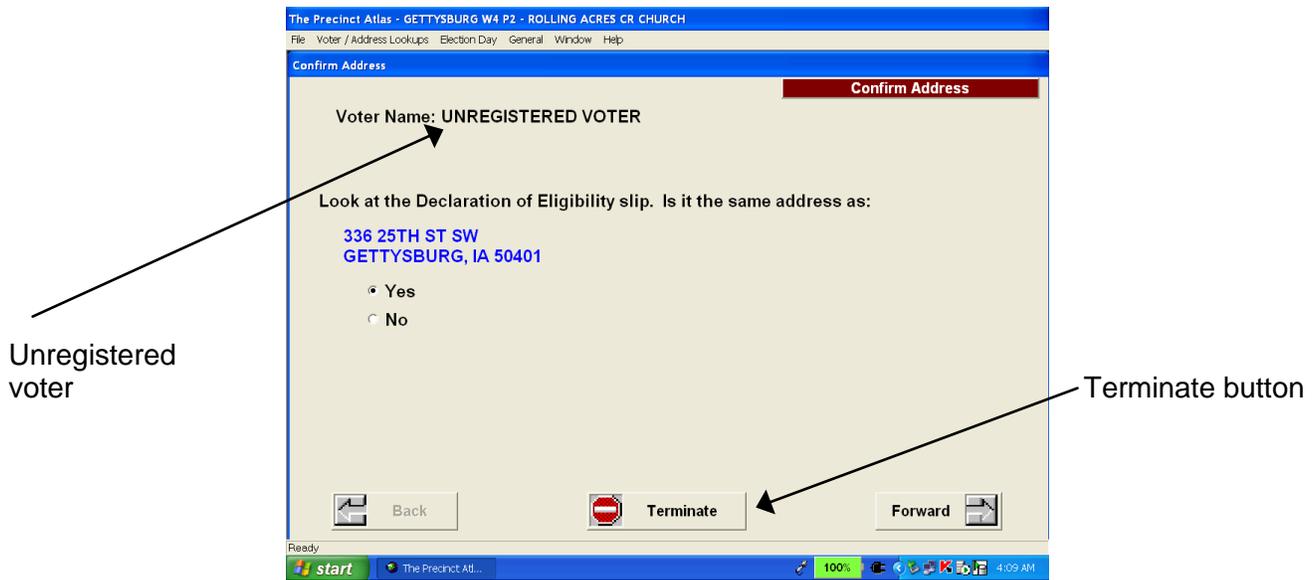
In this example type 336 as the house number, one space, and 25 as the street name, and press Enter on the keyboard; your screen should look like the one below



Say to the precinct officials, “It usually doesn’t take much to find the correct street”

Highlight the correct street row, the third row, and double-click on it or click the Select button

You are now on the Confirm Address screen, which should look like the one below



Termination procedure

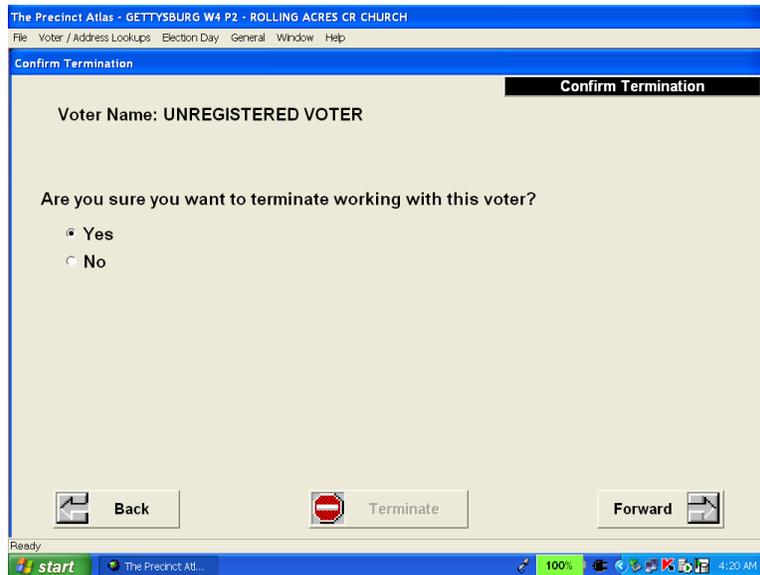
Tell the precinct officials that they will register a voter later in the session, but that for now, you want to show them the termination process

Say to the precinct official that once you start working with a voter, there are three outcomes

- Regular ballot
- Provisional ballot
- The voter leaves the polling place without voting and you terminate working with the voter and capture a reason, such as "I picked the wrong voter" or "Went to get absentee ballot"
- When you terminate working with a voter, the voter's record is restored to the way it was before you opened the polls; for an unregistered voter, the partial record will be deleted

Click the Terminate button

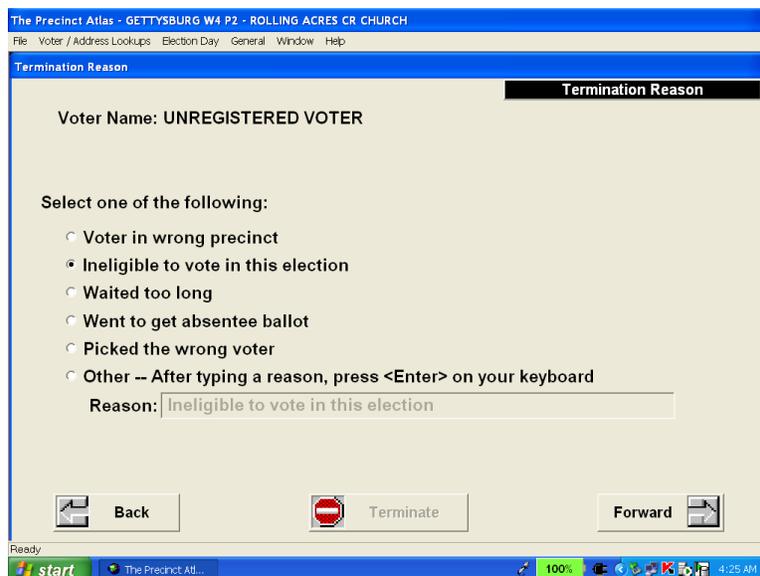
You are now on the Confirm Termination screen, which should look like the screen below



This screen is defaulted "Yes"

Click the Forward button

You are now on the Termination Reason screen, which should look like the screen below



Click on one of the reasons and then click the Forward button

Hands on

Have the precinct officials sit down at the laptop either individually or in pairs

Tell them they are now acting in the role the precinct official and you are acting in the role of the voter

Voter situation #4 – Warren E. Butler

The goal in this voter situation is to:

- Practice surrendering an absentee ballot
- On a task list screen, demonstrate need to check off all tasks as they are completed
- Demonstrate how Forward button is grayed-out until precinct official makes a choice or marks tasks completed

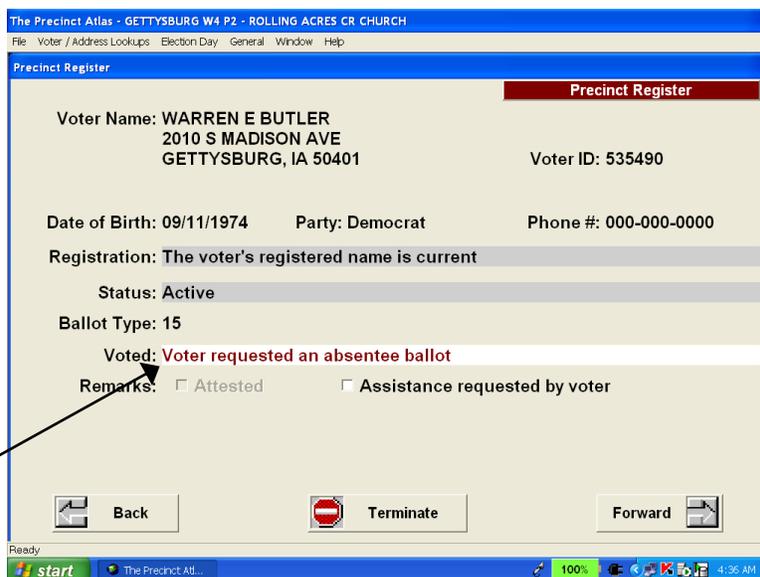
Hand the voter's Declaration of Eligibility form to the precinct official

Instruct the precinct official to keep hands-on the keyboard

Tell the precinct official to type the first three letters of the voter's last name in the last name field, press Tab on the keyboard, type the first letter of the voter's first name in the first name field, and press Enter on the keyboard

On the Confirm Date of Birth screen, answer "Yes" to the question as to whether your date of birth is September 11th (the answer in all future voter situations in this training model will be "Yes")

When the precinct official gets to the Precinct Register screen, it will look like the screen below



Absentee voter

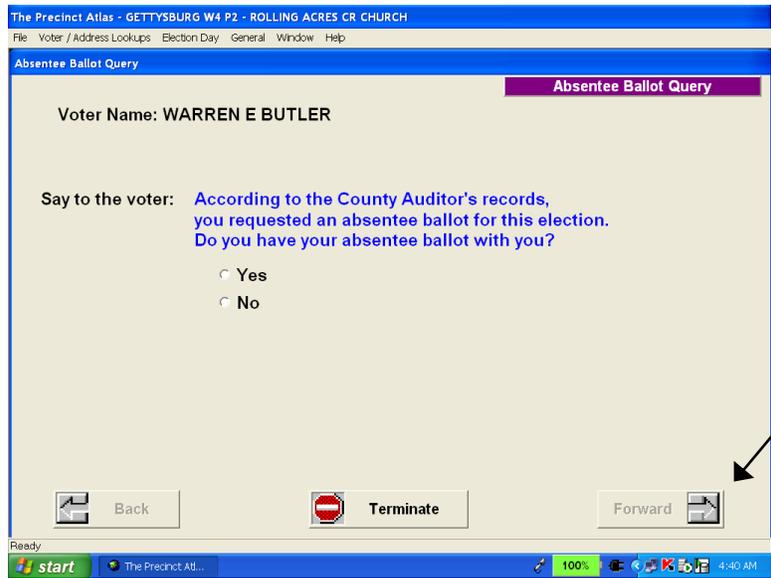
Point out to the precinct official the message “Voter requested an absentee ballot”

Remind the precinct official that this screen is usually informational, and ask,

“What do you think you should do?”

The answer is to click the Forward button

You are now on the Absentee Ballot Query screen, which should look like the screen below



Forward button is grayed-out

Point out that the Forward button is grayed-out until the precinct official marks a choice on the screen

Have the precinct official ask you if you have your absentee ballot with you

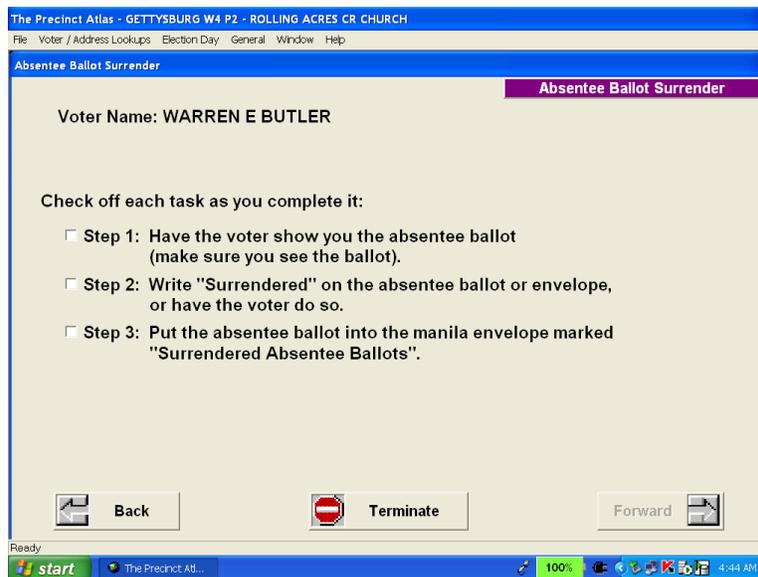
Your answer is "Yes"

Remind the precinct official that they can click on the radio button or on the word, "Yes"

Point out that the Forward button becomes active after the precinct official marks "Yes"

Click the Forward button

You are now on the Absentee Ballot Surrender screen, which should look like the screen below



Tell the precinct officials that this is a “task-list” screen

Point out that the Forward button is grayed-out until they have checked off each task

Instruct them to take one step at a time, and to check off each task they complete it

Click the Forward button

You are now back on the Precinct Register screen, which should look like the screen below

The screenshot shows the 'Precinct Register' window for 'The Precinct Atlas - GETTYSBURG W4 P2 - ROLLING ACRES CR CHURCH'. The voter's name is WARREN E BUTLER, residing at 2010 S MADISON AVE, GETTYSBURG, IA 50401, with a Voter ID of 535490. His date of birth is 09/11/1974, and he is a Democrat with a phone number of 000-000-0000. The registration status is 'The voter's registered name is current', and his status is 'Active'. The ballot type is 15. The 'Voted' field shows 'Voter surrendered an absentee ballot' in red text. Below this, the 'Remarks' section has two checkboxes: 'Attested' and 'Assistance requested by voter', both of which are unchecked. At the bottom of the window are 'Back', 'Terminate', and 'Forward' buttons. The Windows taskbar at the bottom shows the system is ready, with 100% battery and the time 4:47 AM.

Absentee ballot surrendered

Point out that the message under “Voted” now reads, “Voter surrendered an absentee ballot”

Go forward and have this voter cast a regular ballot

When you are back on the Voter Name Search screen, remind the precinct official to click the Clear button to get ready for the next voter

Voter situation #5 – Howard E. Jones

The goals in this voter situation are to:

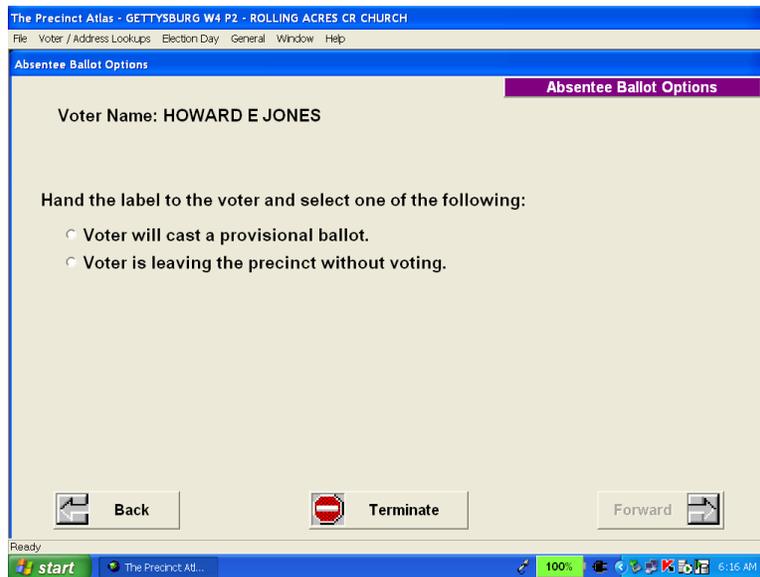
- Show the Absentee Voter's Options label
- Practice an absentee voter leaving the precinct to go get the absentee ballot
- Practice a Termination procedure

Have the precinct official process the voter

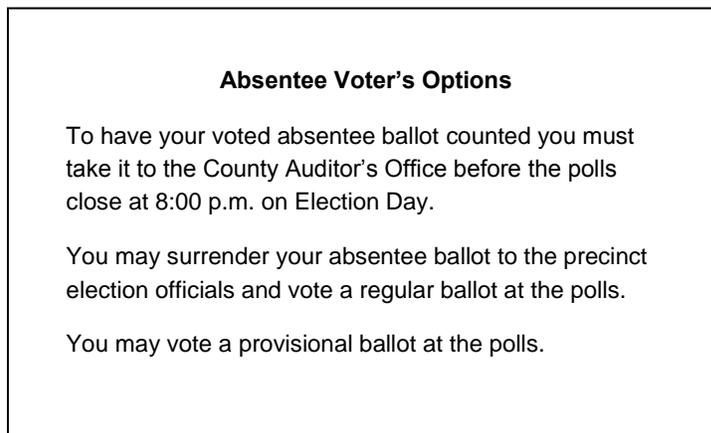
On the Precinct Register screen, show that this voter requested an absentee ballot

On the Absentee Ballot Query screen, your answer is "No", you do not have the ballot with you

The precinct official will now see the Absentee Ballot Options screen below



The label printer will print a label like the one below

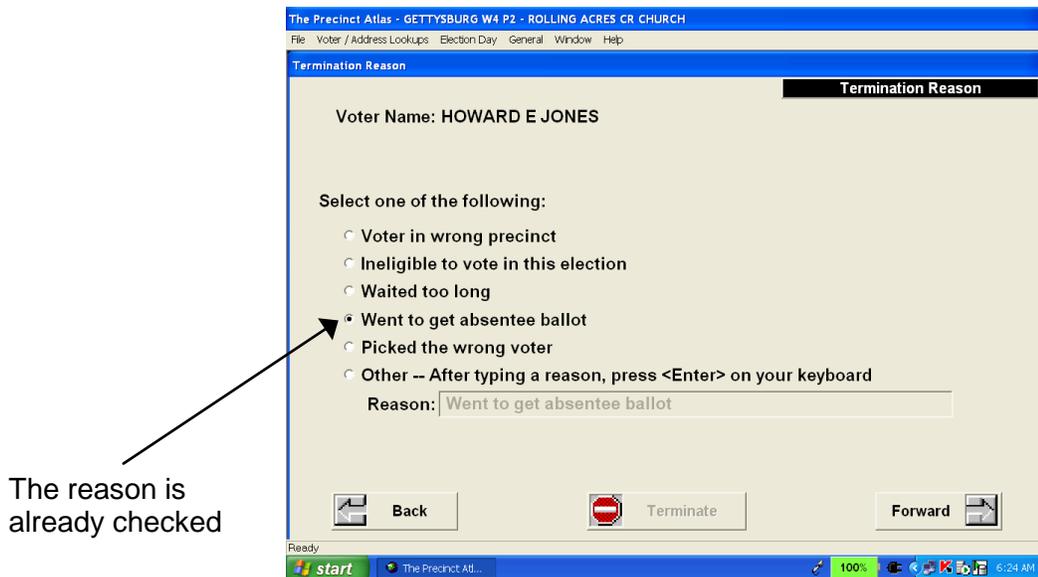


Have the precinct official read the label

Say to the precinct official, "I will go home to get my absentee ballot and come back"

The precinct official should click the second radio button and then the Forward button

The precinct officials will now see the Termination Reason screen below



Show the precinct official that the reason, "Went to get absentee ballot" is already checked

If the voter leaves without voting for a different reason, the precinct official should check the appropriate radio button

Have the precinct official click the Forward button to complete the termination procedure

When the precinct official is back to the Voter Name Search screen, remind them to click the Clear button to get ready for the next voter

Voter situation #6 – Carroll Benton

The goals in this voter situation are to:

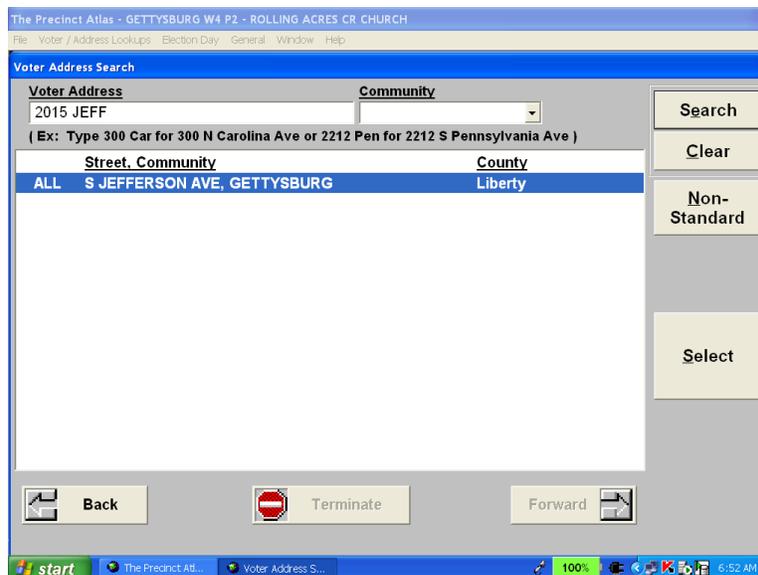
- Train on a voter moving into your precinct
- Show the voter registration screens
- Show the voter registration labels and form

Have the precinct official process the voter

On the Confirm Address screen, the answer is “No” (the address is not the same)

On the Voter Address Search screen, have the precinct official type 2015 JEFF and press Enter on the keyboard

The precinct official will see the Voter Address Search screen below



Remind the precinct official that it usually doesn't take much typing to find the correct street name

Have the precinct official double-click on the correct street name or click the Select button

The precinct official will now see the Voter Registration Information screen below

The Precinct Atlas - GETTYSBURG W4 P2 - ROLLING ACRES CR CHURCH
File Voter / Address Lookups Election Day General Window Help

Voter Registration Information

Voter Registration Information

Last Name: BENTON
First Name: CARROLL
Middle Name: A Suffix:
Iowa Driver's License or Iowa Non-Operator ID: 847ZZ0942
OR Last 4 Digits of Social Security #:
 No valid Iowa driver's license or Social Security #

Date of Birth (MM/DD/YYYY) Gender Political Party
04/07/1989 Female Democrat
Daytime Phone # (Optional) Non-Party Organization
641-423-1329

Back Terminate Forward

Ready
start The Precinct Atl... 100% 6:57 AM

Tell the precinct official that with a pre-registered voter, they should confirm the Date of Birth and Political Party affiliation shown on this screen

When the precinct official is ready, have them click the Forward button to proceed

The precinct official will now be on the Voter Registration Address screen shown below

The Precinct Atlas - GETTYSBURG W4 P2 - ROLLING ACRES CR CHURCH
File Voter / Address Lookups Election Day General Window Help

Voter Registration Address

Voter Registration Address

Name: CARROLL A BENTON

Say to the voter: Do you have an apartment number, PO Box number, or separate mailing address?

House # Suffix Street Name
2015 S JEFFERSON AVE
Apt, Lot, Room (if applicable): (Ex: Apt 10, Lot 7)
City: GETTYSBURG State: IA County: Liberty

Alternate / Mailing Address (optional)

Non-Standard Address

Previous Registration Address
731 S MISSISSIPPI AVE, GETTYSBURG

Back Terminate Forward

Ready
start The Precinct Atl... 100% 9:40 AM

Instruct the precinct official to ask you the question shown at the top of the screen above

When the precinct official is ready, have them click the Forward button to proceed

Three labels will have printed

The precinct official will now be on the Voter Registration Form screen show below

The Precinct Atlas - GETTYSBURG W4 P2 - ROLLING ACRES CR CHURCH
File Voter / Address Lookups Election Day General Window Help

Voter Registration Form

Voter Name: CARROLL A BENTON

Check off each task as you complete it:

- Step 1: Put the three labels on the white Voter Registration form.
- Step 2: Tell the voter to review the information on the Voter Registration form and to sign it.
- Step 3: Put the completed and signed Voter Registration form in the manila envelope entitled, "Voter Registrations".

Back Terminate Forward

Ready start The Precinct At... 100% 9:47 AM

Role play with the precinct official as they find the correct form and put the voter registration labels on it and ask you to sign it

As you sign it, tell the precinct official that you have decided you want to change your party affiliation

Ask them, **“What do you think you should do?”**

The answer could be either:

- 1) click the Back button twice to get to the Voter Registration Information screen where you can make the change on the computer screen and reprint the three labels, or
- 2) cross off the incorrect party affiliation on the voter registration form and write the corrected party affiliation on it

Tell the precinct official that all the voter registration forms will be reviewed by the auditor’s office staff after Election Day, and that the printed form with the voter’s signature is the official record

Have the precinct official finish processing this voter

Voter situation #7 – Marion Davis

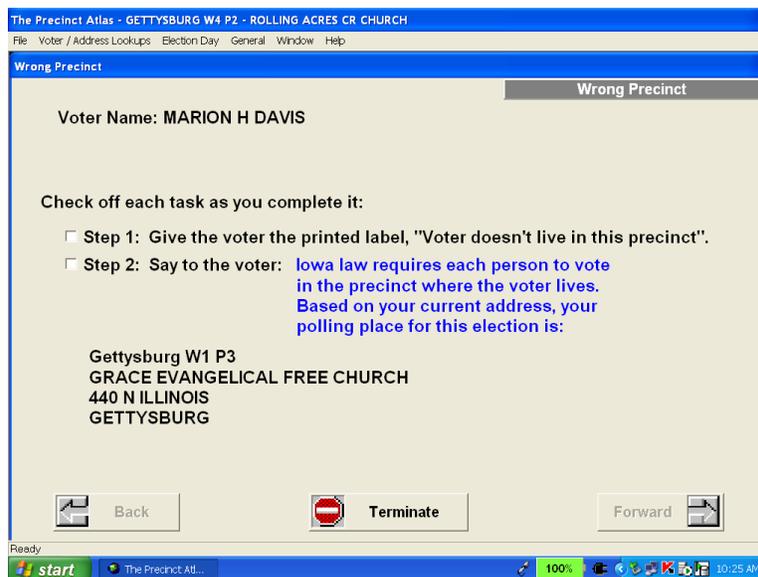
The goals in this voter situation are to:

- Train on a voter who has come to vote in the wrong precinct
- Show the printed “Wrong Precinct” label

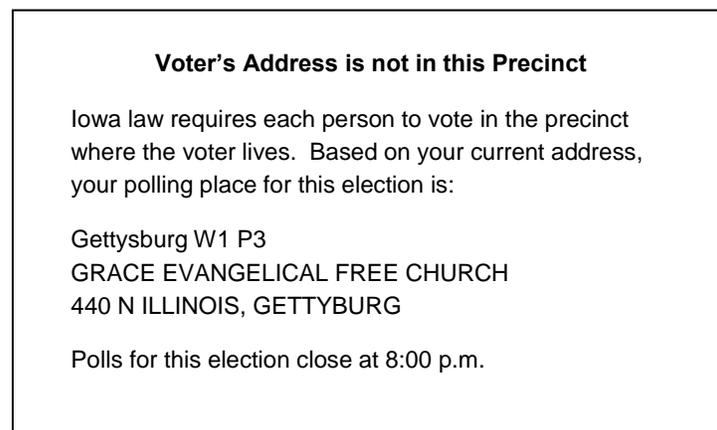
Have the precinct official search for and select the voter’s name

The precinct official should check “No” on the Confirm Address screen

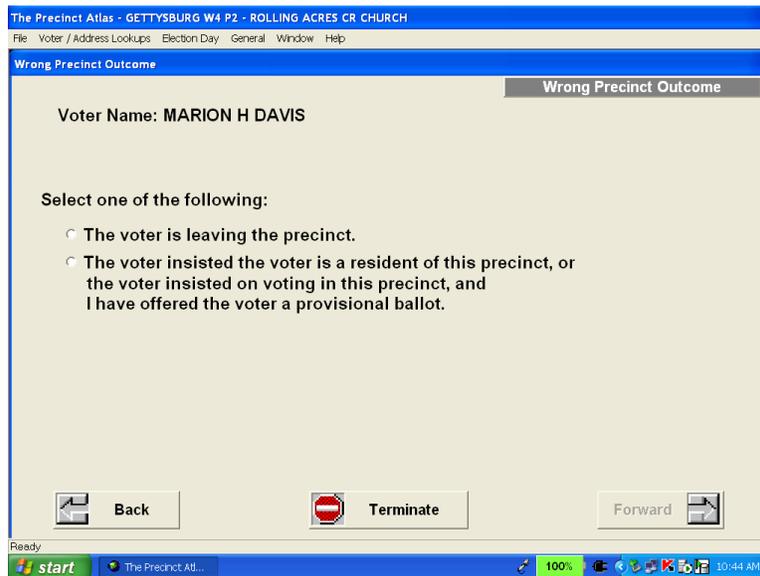
After clicking forward on the Voter Address Search screen, the precinct official will now be on the Wrong Precinct screen shown below



The label printer will have printed the “Voter’s Address is not in this Precinct” label shown below



Once the precinct official has completed the tasks and clicked the Forward button, you will be on the Wrong Precinct Outcome screen shown below

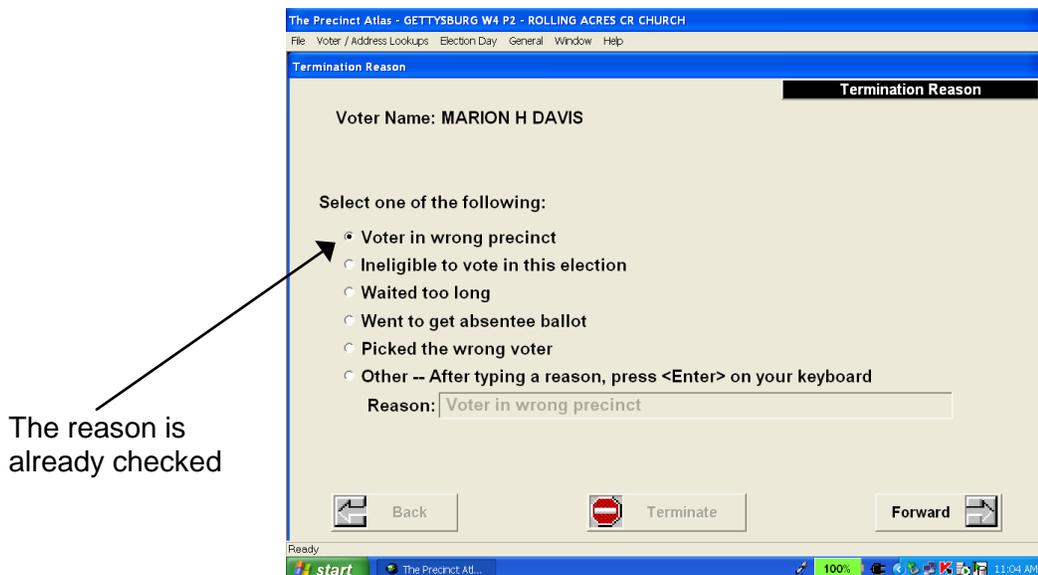


Role play with the voter and tell them that you used to vote here and that after you moved you didn't know where you should go to vote

Tell the precinct official that you will go to your new polling place

The precinct official should check the first radio button, "The voter is leaving the precinct", and then click the Forward button

The precinct official will now be on the Termination Reason screen shown below



Have the precinct official click the Forward button to finish processing this voter

Voter situation #8 – Clayton Mills

The goals in this voter situation are to:

- Register a new voter on Election Day
- Introduce the revised Election Day Voter Registration form and labels
- Demonstrate a photo ID plus separate proof of residence documentation
- Practice completing the voter registration process on the computer screen

Have the precinct official process the voter's Declaration of Eligibility form

When the precinct official doesn't find the voter's name, role play by saying, **"You know, I don't think I'm registered to vote here"**

Ask the precinct official, **"What do you think you should do?"**

The answer is to click the Register New Voter button; when they do, the precinct official will see

- 1) the Voter Address Search screen
- 2) the Confirm Address screen, and
- 3) the blank Voter Registration Information screen shown below

The precinct official will now be on the blank Voter Registration Information screen below

The screenshot shows a web browser window titled "The Precinct Atlas - GETTYSBURG W4 P2 - ROLLING ACRES CR CHURCH". The browser's address bar shows "File Voter / Address Lookups Election Day General Window Help". The main content area is titled "Voter Registration Information" and contains a form with the following fields:

- Last Name: []
- First Name: []
- Middle Name: [] Suffix: []
- Iowa Driver's License or Iowa Non-Operator ID: []
- OR Last 4 Digits of Social Security #: []
- No valid Iowa driver's license or Social Security #
- Date of Birth (MM/DD/YYYY): 00/00/0000
- Gender: []
- Political Party: []
- Daytime Phone # (Optional): []
- Non-Party Organization: []

At the bottom of the form are three buttons: "Back", "Terminate", and "Forward". The Windows taskbar at the bottom shows the "start" button, the active window "The Precinct Atl...", a 100% zoom level, and the time "1:58 PM".

Role play with the precinct official to fill in the voter's information

Tell the precinct official to click the Forward button to see that all required fields must be completed before they can proceed to the next screen

When all the required information is typed in, the screen will look as below

The screenshot shows the same web browser window as above, but with the form fields filled in:

- Last Name: MILLS
- First Name: CLAYTON
- Middle Name: R Suffix: []
- Iowa Driver's License or Iowa Non-Operator ID: 969ZZ9556
- OR Last 4 Digits of Social Security #: []
- No valid Iowa driver's license or Social Security #
- Date of Birth (MM/DD/YYYY): 10/11/1948
- Gender: Male
- Political Party: No Party
- Daytime Phone # (Optional): []
- Non-Party Organization: []

The "Forward" button is highlighted, indicating it is the next step in the process. The Windows taskbar at the bottom shows the time "3:18 PM".

Have the precinct official click the Forward button

The precinct official will now be on the Voter Registration Address screen below

The Precinct Atlas - GETTYSBURG W4 P2 - ROLLING ACRES CR CHURCH
File Voter / Address Lookups Election Day General Window Help

Voter Registration Address

Name: CLAYTON R MILLS

Say to the voter: **Do you have an apartment number, PO Box number, or separate mailing address?**

House #	Suffix	Street Name
2630		S FEDERAL AVE

Apt, Lot, Room (if applicable): (Ex: Apt 10, Lot 7)

City: GETTYSBURG State: IA County: Liberty

Alternate / Mailing Address (optional)

Non-Standard Address

Previous Registration Address

Back Terminate Forward

Ready start The Precinct Atl... 100% 2:07 PM

Have the precinct official ask you the question, **“Do you have an apartment number, PO Box number, or separate mailing address?”**

When the precinct official is ready, have them click the Forward button to proceed

The label printer will print three labels

The precinct official will now see the EDR Registration Form screen below

The Precinct Atlas - GETTYSBURG W4 P2 - ROLLING ACRES CR CHURCH
File Voter / Address Lookups Election Day General Window Help

Voter Registration Form

Voter Name: CLAYTON R MILLS

Check off each task as you complete it:

- Step 1: Put the three labels on the yellow Election Day Voter Registration form.
- Step 2: Tell the voter to review the information on the Voter Registration form and to sign it.

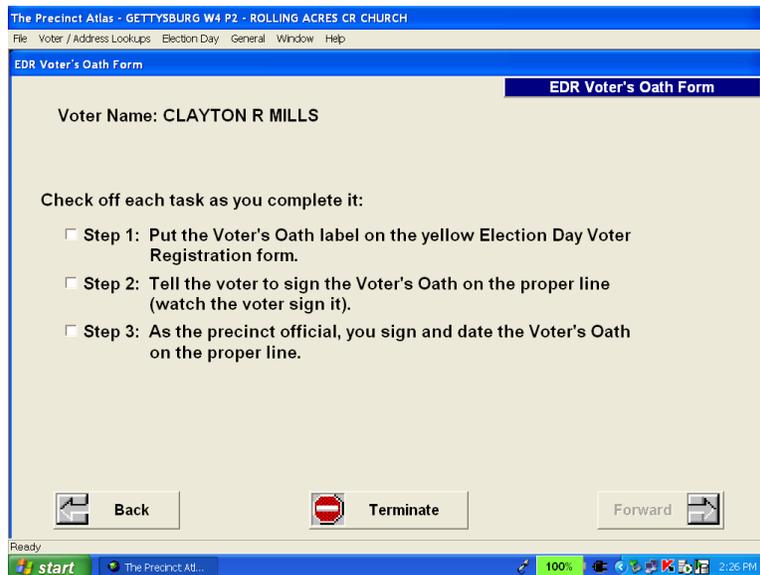
Back Terminate Forward

Ready start The Precinct Atl... 100% 2:20 PM

Have the precinct official locate the yellow Election Day Voter Registration form and apply the three labels in the correct positions

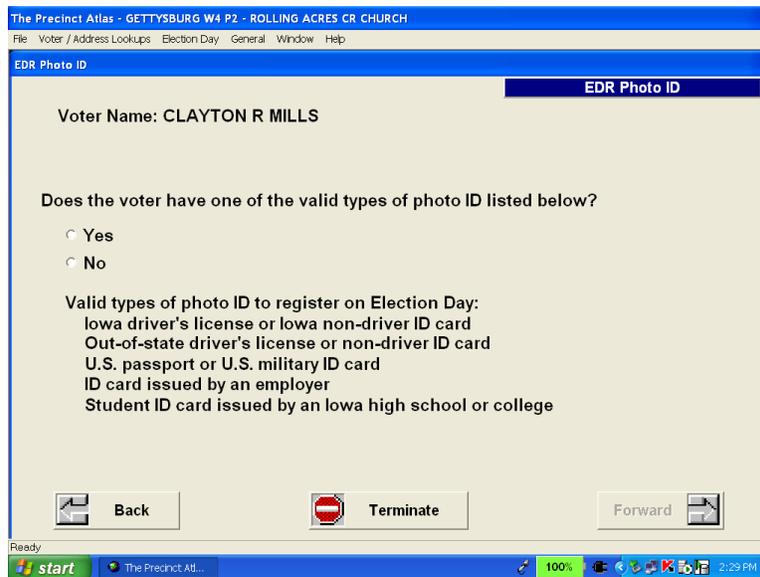
When the precinct official is ready, have them click the Forward button to proceed

The precinct official will now see the EDR Voter's Oath Form screen below



Have the precinct official apply the Voter's Oath label in the correct position on the yellow form, complete the other tasks, and then click the Forward button to proceed

The precinct official will now see the EDR Photo ID screen below

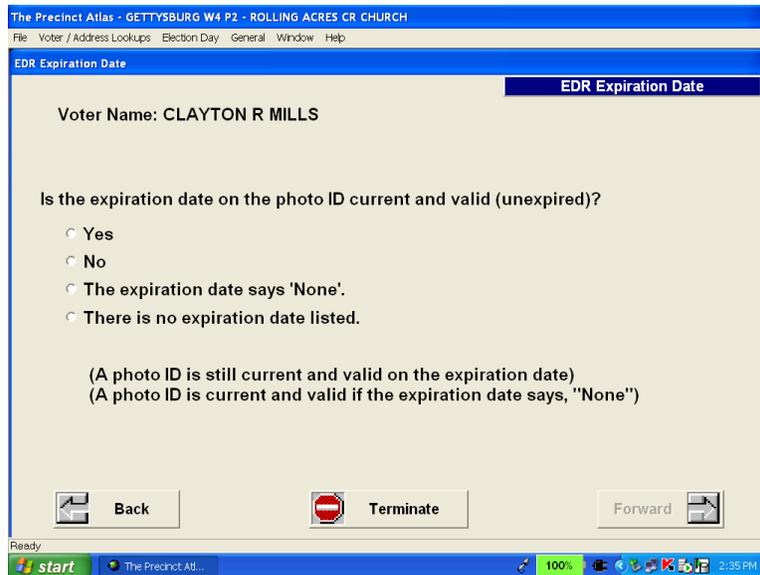


Role play by having the precinct official ask you if you have a driver's license or other form of photo ID

Say, "Yes, I do", and hand the sheet with the photo IDs to the precinct official (if you have not already done so)

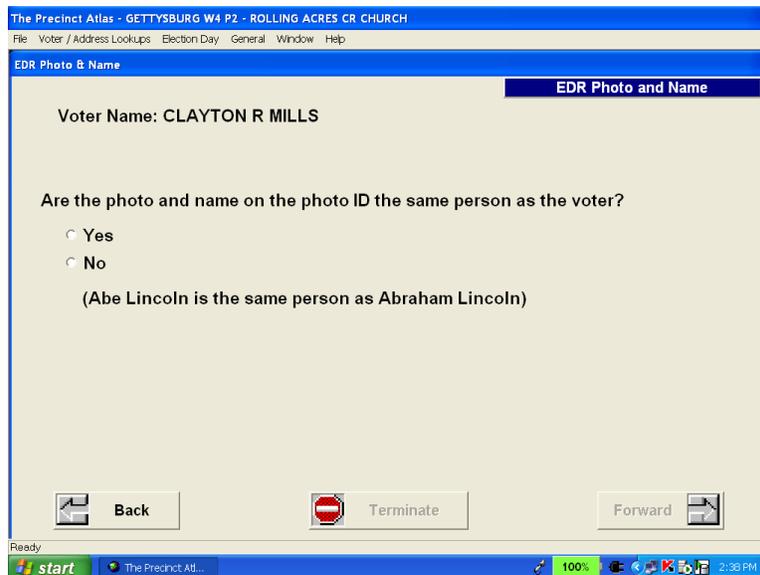
The precinct official should check the Yes radio button and click the Forward button to proceed

The precinct official will now see the EDR Expiration Date screen below



The precinct official should look at the photo ID for Clayton Mills and check the "Yes" radio button, and then click the Forward button to proceed

The precinct official will now see the EDR Photo and Name screen below



The precinct official should check the "Yes" radio button and then click the Forward button to proceed

The precinct official will now see the EDR Photo ID Address screen below

The Precinct Atlas - GETTYSBURG W4 P2 - ROLLING ACRES CR CHURCH
File Voter / Address Lookups Election Day General Window Help

EDR Photo ID Address

Voter Name: CLAYTON R MILLS
Voter Address: 2630 S FEDERAL AVE
GETTYSBURG, IA 50401

Is the voter's address on the photo ID the same as above?

Yes
 No

Back Terminate Forward

Ready start The Precinct Atl... 100% 2:42 PM

The address on the photo ID is the voter's old address, so the answer to the above question is "No"

After checking "No", the precinct official should click the Forward button to proceed

The precinct official will now see the EDR Separate Proof Residence screen below

The Precinct Atlas - GETTYSBURG W4 P2 - ROLLING ACRES CR CHURCH
File Voter / Address Lookups Election Day General Window Help

EDR Separate Proof Residence

Voter Name: CLAYTON R MILLS

Does the voter have one of the valid forms listed below to prove residence?

Yes
 No

Valid forms of proof of residence:
Residential lease
Property tax statement
Utility bill, including a cell phone bill
Bank statement
Paycheck or government check
Other government document

Back Terminate Forward

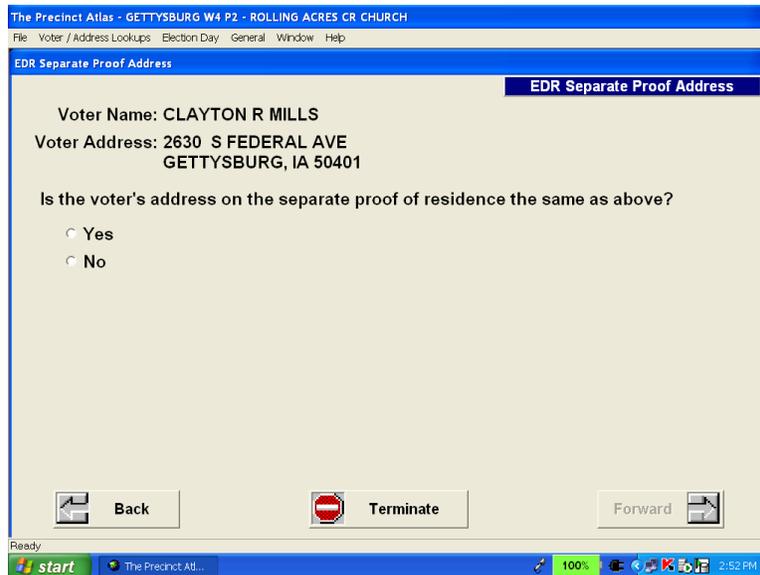
Ready start The Precinct Atl... 100% 2:47 PM

Role play by having the precinct official ask you,
"Do you have a separate proof of residence?"

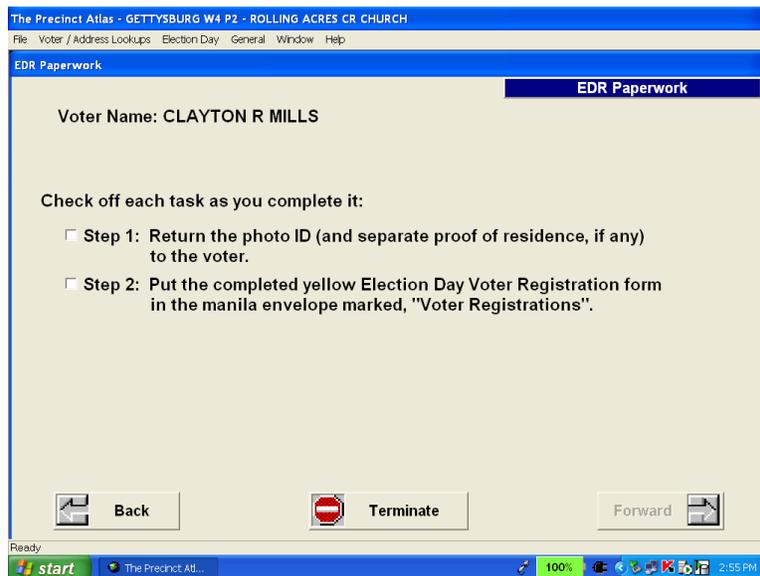
Hand the sheet with the photo IDs to the precinct official and say,
"Yes, I have a utility bill"

The precinct official should check the Yes radio button and then click the Forward button to proceed

The precinct official will now see the EDR Separate Proof Address screen below



The precinct official should look at the utility bill and check the Yes radio button and then click the Forward button to proceed



Have the precinct official complete the tasks and then click the Forward button to proceed

Finish processing this voter

Voter situation #9 – Shelby Jackson

The goals in this voter situation are to:

- Register another new voter on Election Day
- Show the convicted felon screen
- Demonstrate the attestation process for a voter who registers on Election Day

Hand the voter's Declaration of Eligibility form to the precinct official and have them process it

Tell the precinct official that you don't think you are registered to vote, but that you do want to vote

Your date-of-birth is 01-23-1969; make sure the precinct official types this in correctly on the Voter Registration Information screen

When the precinct official clicks the Forward button on the Voter Registration Information screen, you will see the Felon List Check screen below

The Precinct Atlas - GETTYSBURG W4 P2 - ROLLING ACRES CR CHURCH

File Voter / Address Lookups Election Day General Window Help

Felon List Check

Felon List Check

Voter Name: SHELBY J JACKSON

Voter is a possible match to a convicted felon

Felony List Matches:

Last Name	First Name	Middle Name	Date of Birth
JACKSON	SHELLEY	EVELYN	01/23/1969

Select one of the following:

- Voter is a possible match to the name above.
- Voter's name does not match the name above.

Back Terminate Forward

Ready

start The Precinct Atl... 100% 3:39 PM

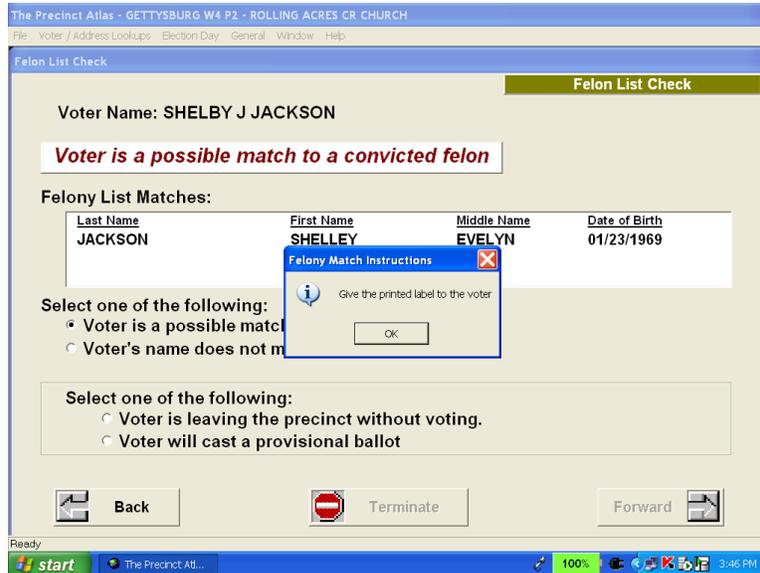
Tell the precinct official

- 1) this screen means that this voter **might** be a match to a person on the statewide list of convicted felons
- 2) the last name matches, the date of birth matches, and the first letter of the voter's first name matches
- 3) the precinct official will need to make a judgment call on whether it is the same person

In this voter situation, it is a different person and does not match

However, tell the precinct official to check the first radio button, **“Voter is a possible match to the name above”**

The screen will now appear as below



Also, the label printer will print the label shown below

Voter name possible match on felon list

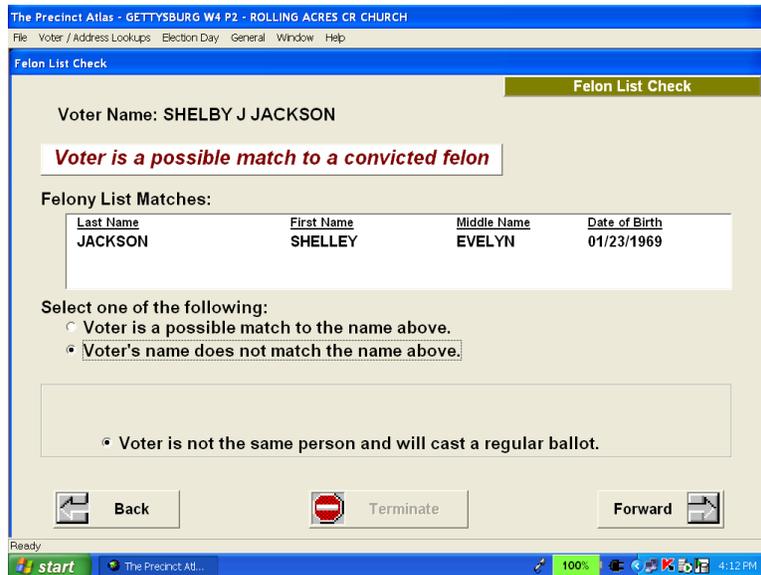
The voter's name is a possible match to a name on the official statewide list of convicted felons. The voter:

- 1) has a right to cast a provisional ballot at the polls on Election Day
- 2) can contact the office of the Iowa Secretary of State by calling (515) 242-5071
- 3) can contact the county auditor by calling (123) 456-7890 or by stopping in the office located at 123 Main Ave, Gettysburg, IA, 50401

Tell the precinct official to hand the label to the voter (you) and tell you to read it

Since the voter's name did not match and this was just for practice, have the precinct official click OK to close the window and then to check the second radio button above, **“Voter's name does not match the name above”**

The screen will now look like the one below

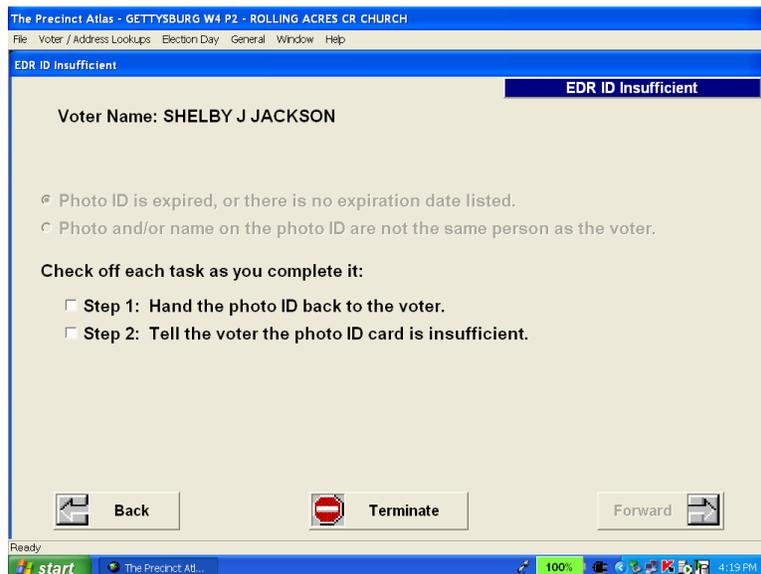


Tell the precinct official to click the Forward button to proceed with this voter

When you get to the EDR Photo ID screen, hand the sheet of photo IDs to the precinct official

On the EDR Expiration Date screen the precinct official should check the "No" radio button, because the driver's license is expired

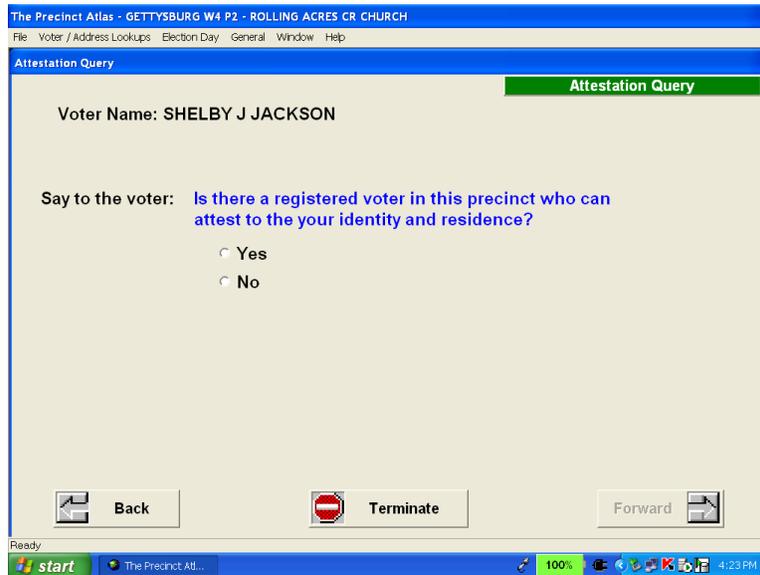
The precinct official will now see the EDR ID Insufficient screen below



Have the precinct official complete each task and then click the Forward button to proceed

When the precinct official is back on the EDR Photo ID screen and asks you if you have another form of photo ID, your answer is **“No”**

The precinct official will now see the Attestation Query screen below



Role play with the precinct official and say,
“Yes, my friend Larry Warner can attest for me”

Have the precinct official check “Yes” and then click the Forward button to proceed

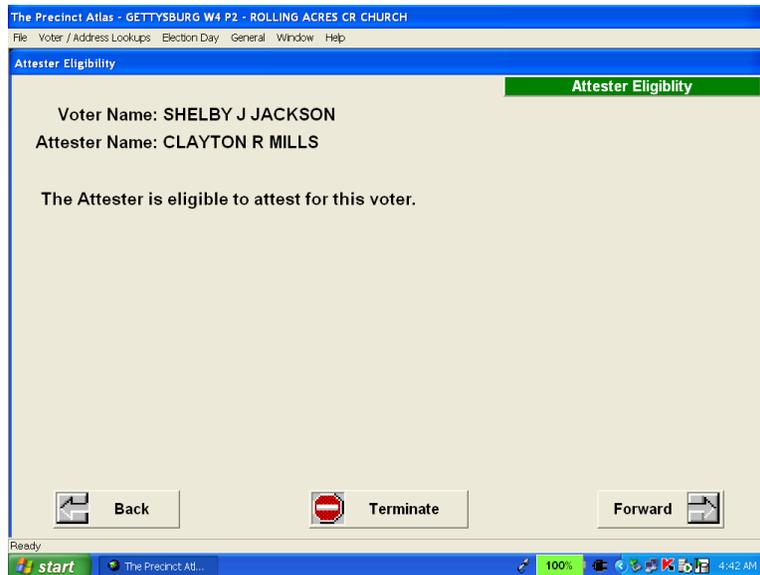
Have the precinct official search for and select the name of the attester, just as they would for a voter’s name

The precinct official will see an error message,
“This person does not live in this precinct and cannot attest for the voter”

Role play by having the precinct official ask you if there is someone else who can attest for you

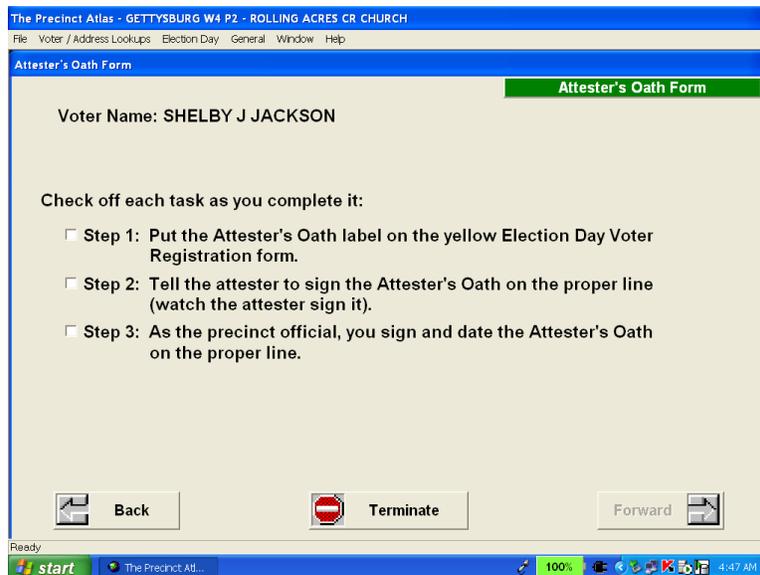
Say, **“Yes, my friend Clayton Mills can attest for me”**

The precinct official will now see the Attester Eligibility screen below



When the precinct official clicks “Forward” on the above screen, the label printer will print out the “**Attester’s Oath**” label

The precinct official will now see the Attester’s Oath Form screen below



Have the precinct official complete each task and check it off as they do

Tell the precinct official that the yellow Election Day Voter Registration form will have five labels if the voter uses an attester, but only four if they do not

Have the precinct official finish processing this voter

Conclusions

No magic formula for training precinct officials; people will have different training styles and abilities and different election experiences

Most important thing is for the precinct officials to get hands-on experience with processing voters

The basic lesson for precinct officials is to read the screen and answer the question or follow the directions

Experienced precinct officials will anticipate and want to jump ahead; they need to learn the pace of the PA program, one issue per screen

Not all precinct officials will be good on the laptop; not all will want to use it personally

Train a lot of precinct officials (some counties train all of them), and sort out who will be your high producers who should work on the laptop when the election turnout is high

For those who will not be using the laptops, they have an understanding of and confidence in the software and system