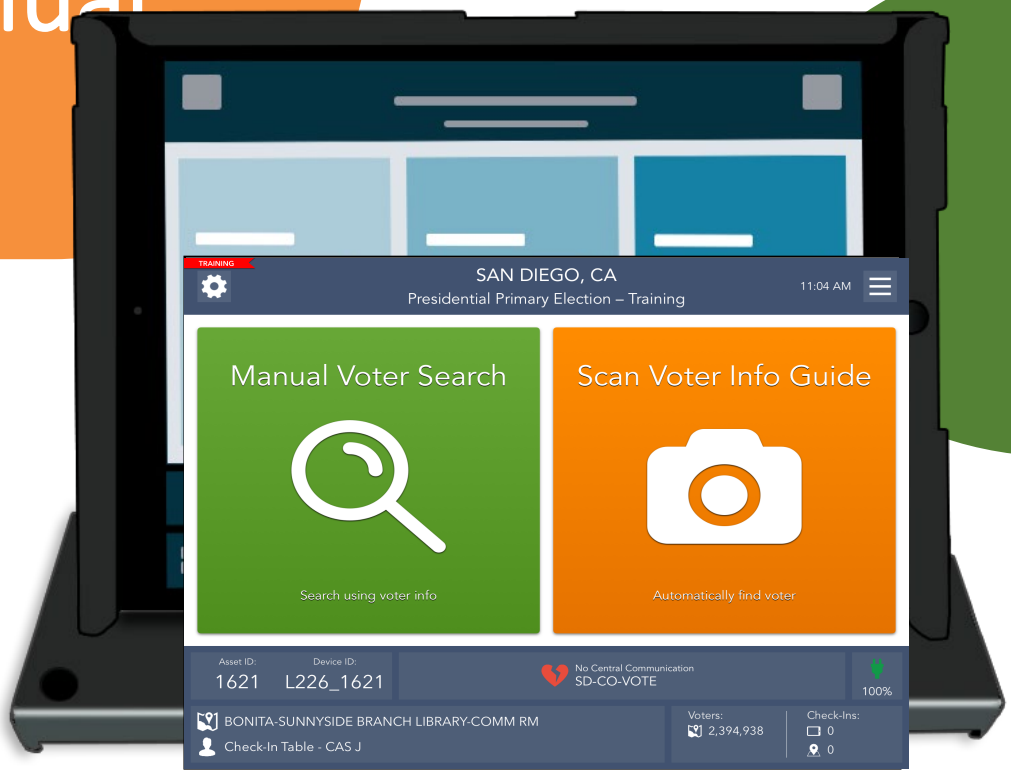
ePollbook Manual

SDVOTE
COUNTY OF SAN DIEGO
REGISTRAR OF VOTERS



March 5,2024 Presidential Primary Election

San Diego County California

EPB Manual also available at:
SDVOTE.COM
"Poll Worker" tab
"More Training Information"

Table of Contents

ASSEMBLY **2**

LOGGING INTO THE EPOLLBOOK **4**

THE LAUNCHPAD **5**

THE LAUNCHPAD MENU **6**

SEARCHING FOR A VOTER **7**

SPECIAL TOPIC **8**

BLUE MESSAGE BOXES 8

VBM BALLOT BMD"ISSUED VOTERS – **9**

VOTING IN PERSON "BMD' REGISTERED WITH QUALIFIED POLITICAL PARTY **9**

VOTING IN PERSON "BMD" REGISTERED AS NP 12

VBM BALLOT ISSUED VOTERS **14**

VOTING IN PERSON – "NON-BMD" 14

VOTING IN PERSON – "NON-BMD"- EMERGENCY BALLOT 17

RESIDENTIAL ADDRESS CHANGE (SB207) 20

POLITICAL PARTY CHANGE (SB207) 23

CONDITIONAL VOTER REGISTRATION **23**

HAVA ID REQUIRED: PHOTO ID PROVIDED **30**

NO HAVA ID PROVIDED **31**

VBM BALLOT ALREADY RETURNED **34**

BALLOT ALREADY ISSUED BY EPB **36**

PROVISIONAL VOTED **37**

UNCONFIRMED ADDRESS **39**

DECERTIFIED **43**

ELIGIBLE/INACTIVE VOTER **44**

CHECK-IN Totals AND LOGS **45-46**

WAIT TIME TICKET **47**

LOGOUT TEMPORARILY **48**

CLOSING FOR THE DAY **49**

POLL WORKER CLOCK IN – TIME KEEPING **50**

TROUBLESHOOTING **53**

MANUALLY CONNECTING EPB TO CRADLEPOINT 53

FAQS 54

Assembly

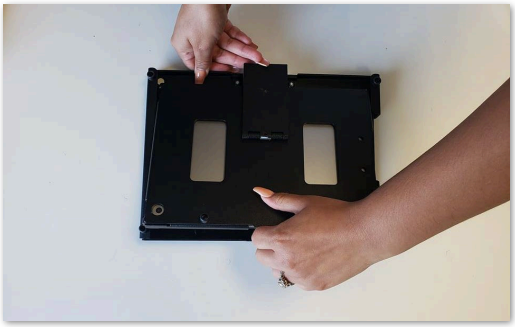
1 The ePollbook carrying case should be set on the check-in table as pictured.

2 Open the case by unlatching the two locks at the top of the case.

3 Once opened, you will see 3-4 ePollbooks and charging cords. Remove the ePollbooks and charging cords from the case and set them on the table.

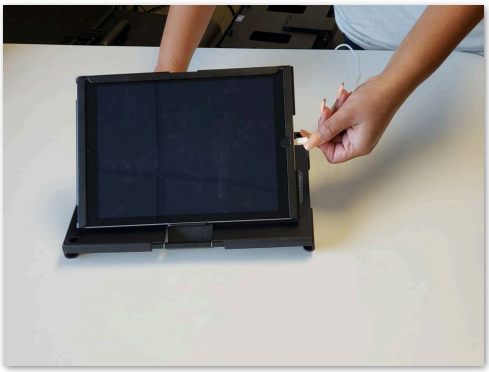
4 Power on the Cradlepoint then plug it into a power source (Poll Worker Manual pgs. 74-76).

5 Open your ePollbook by inserting your finger under the tab opposite the hinge. Open the case as if opening a book, breaking the binding and flipping it open. Set the ePollbook on the table.



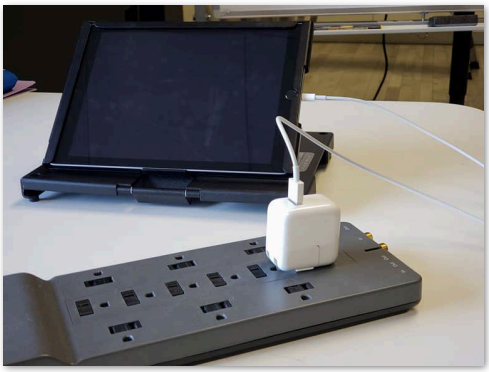
6 Once the ePollbook has been properly set up, locate the power port on the right-hand side of the unit.

7 Insert the compatible end of the white charging cord into the charging port on the ePollbook.



8 Plug the other end of the charging cord into the USB charging brick.

9 Plug the brick into the power outlet. The ePollbook will turn on automatically.

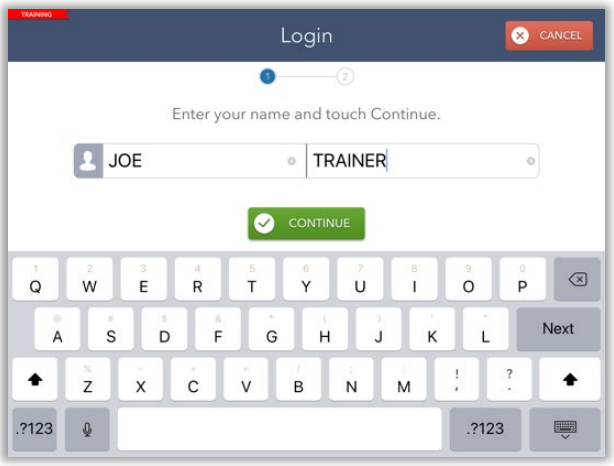


10 Your hardware is now set up and you are ready to log in to the ePollbook.

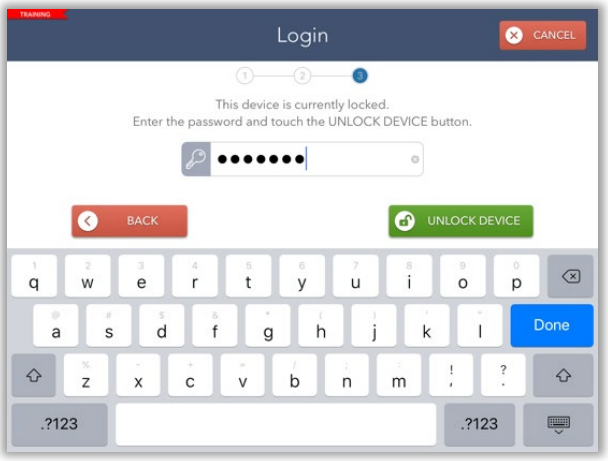
Logging into the ePollbook

1 Touch the home button to get to launch screen. Touch the green **START** button to begin logging in.

2 Enter your full first and last name using the pop-up keyboard and touch **CONTINUE**.



3 Enter the password given then touch **UNLOCK DEVICE.**



4 After the ePollbook has been unlocked, you will be redirected to the **Launchpad** screen and ready to begin checking in voters.

The Launchpad

This is the Launchpad screen. After every check-in, you should arrive back at this screen.

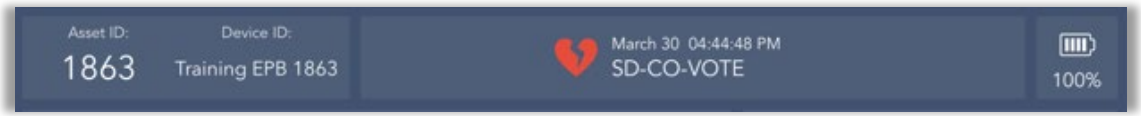
At the top of the screen you will see		At the bottom of the screen you will see	
1	Settings Menu	4	Vote center location and your name
2	Election Name	5	Connectivity status (*must **always** display green fan)*
3	Launchpad Menu	6	Battery status

Green and Orange Buttons

To manually search for a voter, touch the green **Manual Voter Search** button.

The orange **Scan Voter Info Guide** button will scan a voter's sample ballot, but only use the **Manual Voter Search** button to look up a voter.

Broken Red Heart



If any EPB displays a broken red heart, please take steps to reconnect immediately.
See FAQs under Troubleshooting on page 50.

The Launchpad Menu

The Launchpad Menu provides menu options to access additional system functions.

Launchpad Menu options:

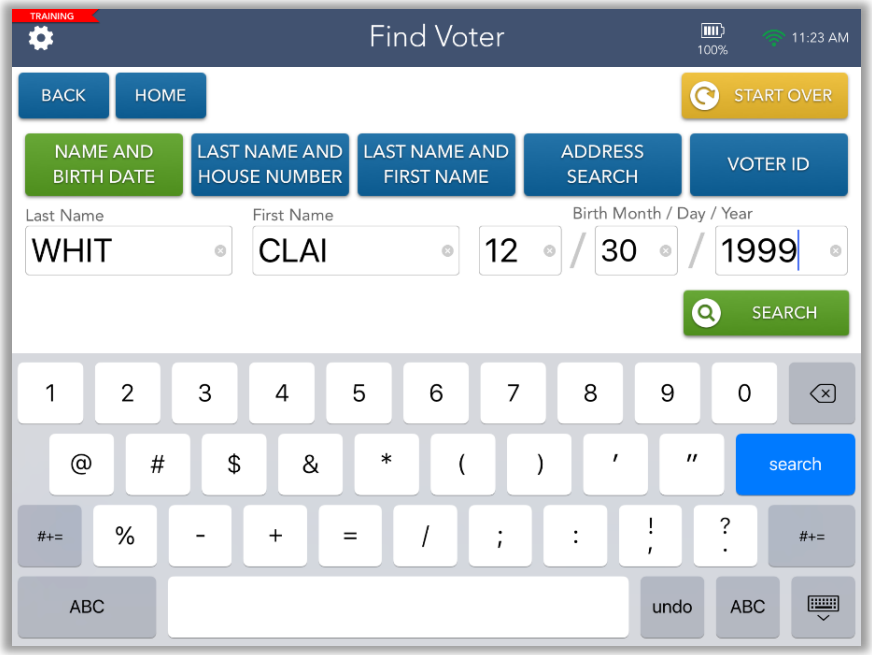
1	**CHECK-IN LOGS** – View a running log of all check-ins
2	**CHECK-IN TOTALS** – View running totals of different ballot styles issued throughout the day
3	**WORKER CLOCK-IN** – Use this feature for poll worker board timekeeping *(not applicable this election)*
4	**PROCESS CVR** – Process a Conditional Voter Registration transaction
5	**ENTER WAIT TIME** – Use this feature to enter the length of time voters wait in line *(Election Day only)*
6	**LOGOUT** – Use this feature to temporarily logout for a break or to close the election at the end of the day

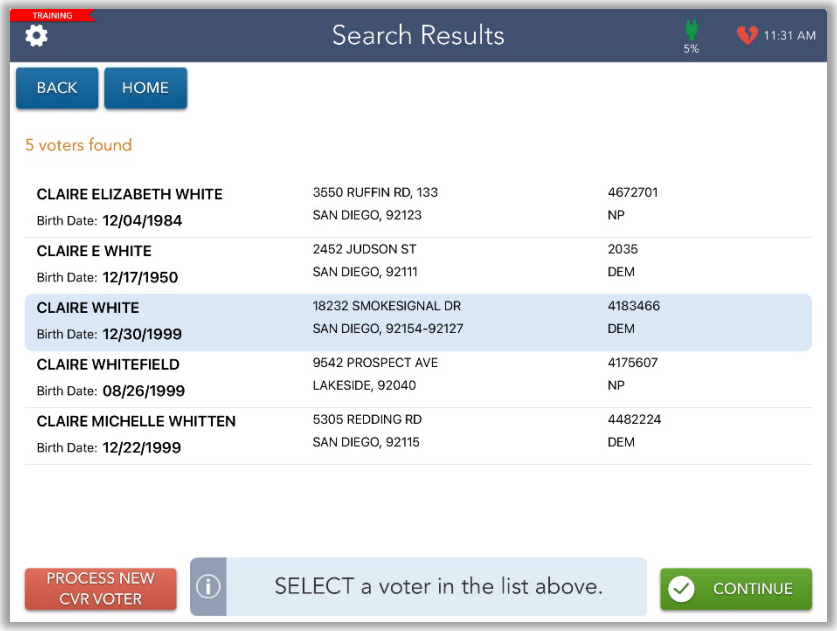
Searching for a Voter

To search for a voter using the Check-In Form, touch the green **MANUAL VOTER SEARCH** button on the Launchpad screen.

Using information provided by the voter on the Check-In Form, use one of the five available search options to search for the voter's record.

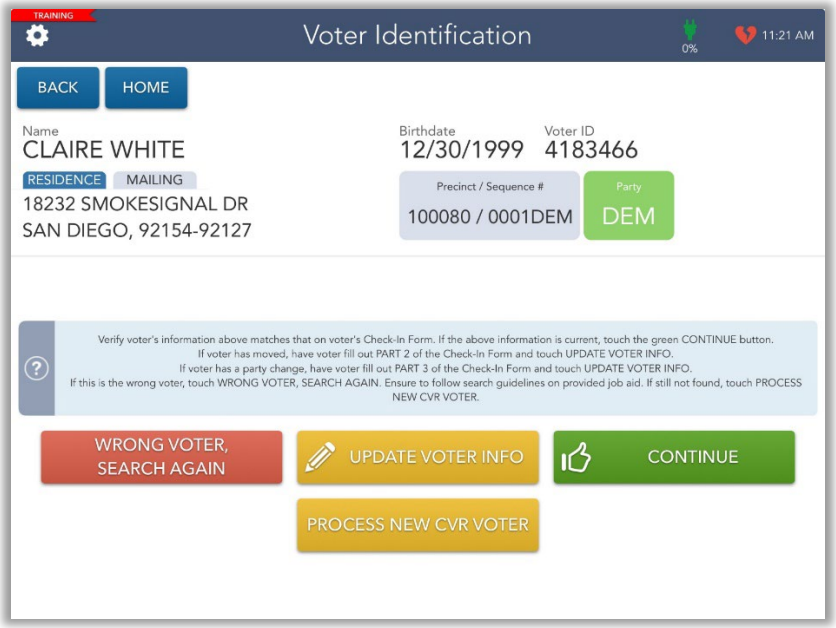
Begin with Name and Birth Date. Enter the voter's information into the search fields chosen by using the on-screen keyboard. Then touch the green **SEARCH** button to continue.





If only one voter matches the search criteria, the Voter Identification screen will appear automatically. Continue checking in your voter.

However, if more than one voter matches the search criteria, your screen will look like the one on the left with a list of all possible matches. Touch the correct voter from the list and then touch the green **CONTINUE** button.



After you select a voter, you will be redirected to the **Voter Identification** screen. The voter's information will be displayed. Touch **CONTINUE** to navigate to the **Voter Eligibility** screen.

Special Topic

Blue Message Boxes

Read through all blue message boxes carefully prior to completing directions.

An instruction that begins with "(ROV)" only applies to the ROV office and does not apply to Vote Centers, please disregard.

1. READ 2. DO 3. CLICK

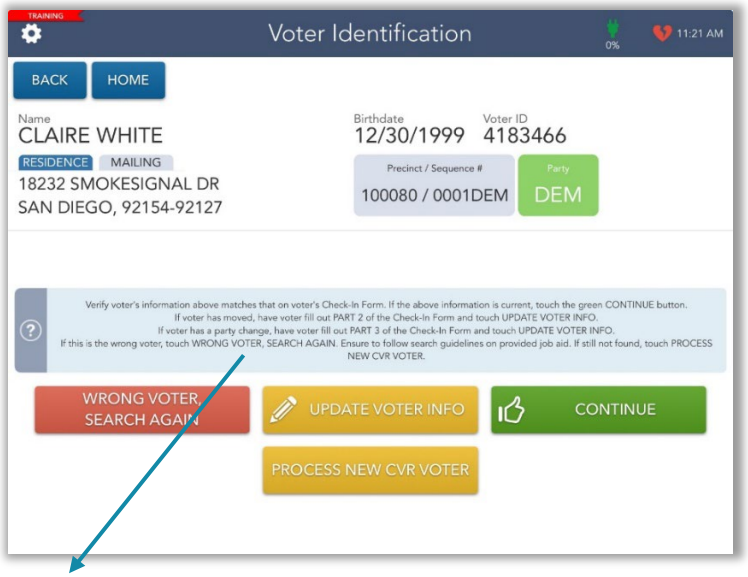
VBM Ballot Issued Voters

Voting in Person – "BMD" – Voter Registered with Political Party

1

Once you have found the correct voter, their information will display on the **Voter Identification** screen.

Read all instructions in blue message box before proceeding. If voter information is current, select **CONTINUE** to begin processing them.



The blue message box states:

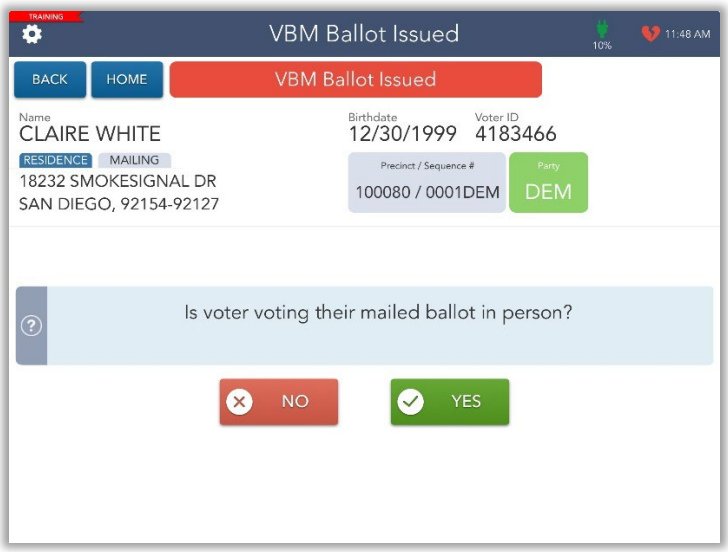
Verify voter's information above matches that on voter's Check-In Form. If the above information is current, touch the green CONTINUE button.
If voter has moved, have voter fill out Part 2 of the Check-In Form and touch UPDATE VOTER INFO.
If voter has a party change, have voter fill out PART 3 of the Check-In Form and touch UPDATE VOTER INFO.
If this is the wrong voter, touch WRONG VOTER, SEARCH AGAIN. Ensure to follow search guidelines on provided job aid. If still not found, touch PROCESS NEW CVR VOTER.

2

Ask the voter if they are voting on their mailed ballot in person.

If not, select **NO**.

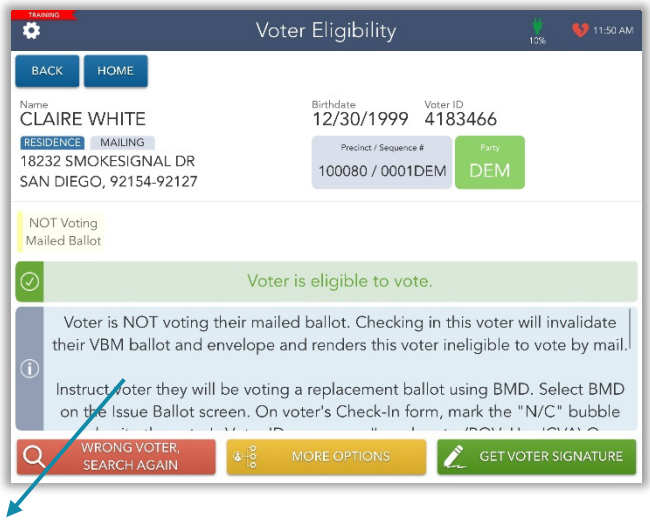
This voter will use the BMD to make their selections and cast their ballot.



3

If the voter is eligible to vote a regular ballot, the screen will display a green “Voter is eligible to vote” message. Scroll through the blue message box and follow the applicable instructions to process the voter.

Select **GET VOTER SIGNATURE** to continue.



The blue message box states:

Voter is NOT voting their mailed ballot. Checking in this voter will invalidate their mail ballot and envelope and renders this voter ineligible to vote by mail.

Instruct voter will be voting a BMD replacement ballot. Select BMD on the Issue Ballot screen. On voter’s Check-In form, mark the “N/C” bubble and write the voter’s Voter ID, sequence #, and party. On voter’s BMD Ticket, write voter’s sequence # and party.

4

The **Voter Signature** screen will appear.

Complete the sequence number verification step with the voter prior to asking for their signature. Verify with voter that the Sequence Number and party from the EPB matches their voting materials.

Verify the voter signed their Check-In Form. Tilt the ePollbook screen toward the voter and have them sign.

Once they have signed, they will need to select the **DONE** button.

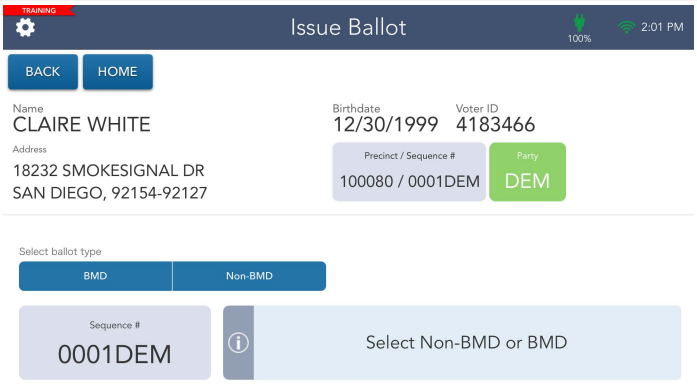
5

Flip the screen back toward you. Select the **ISSUE BALLOT** button to continue.

6

The ePollbook does not automatically select a ballot type, so you will need to do so manually as previously directed by the blue box.

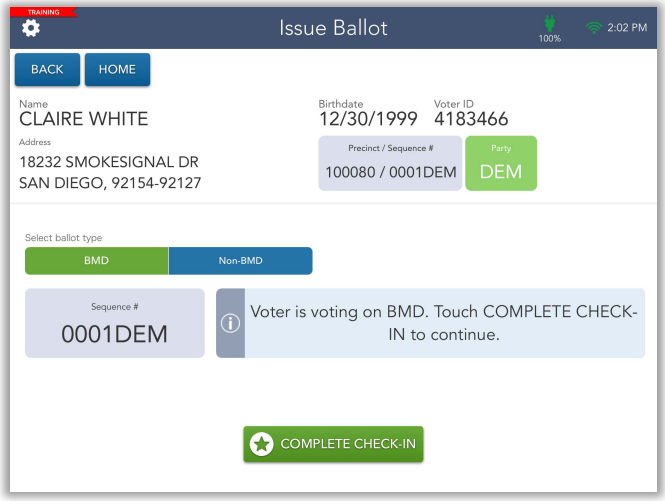
Select **BMD** under the **Select ballot type** field.



7

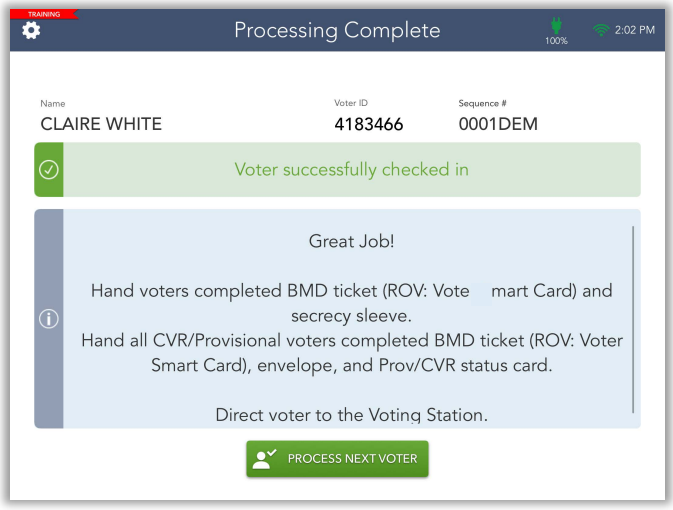
The **BMD** ballot type button will turn **green** once it has been selected.

Review the procedures for the selected ballot type in the blue box then select **COMPLETE CHECK-IN.**



8

Congratulations! The voter has been successfully checked in. Complete all applicable instructions in the blue box then select the **PROCESS NEXT VOTER** button and move on to the next voter.



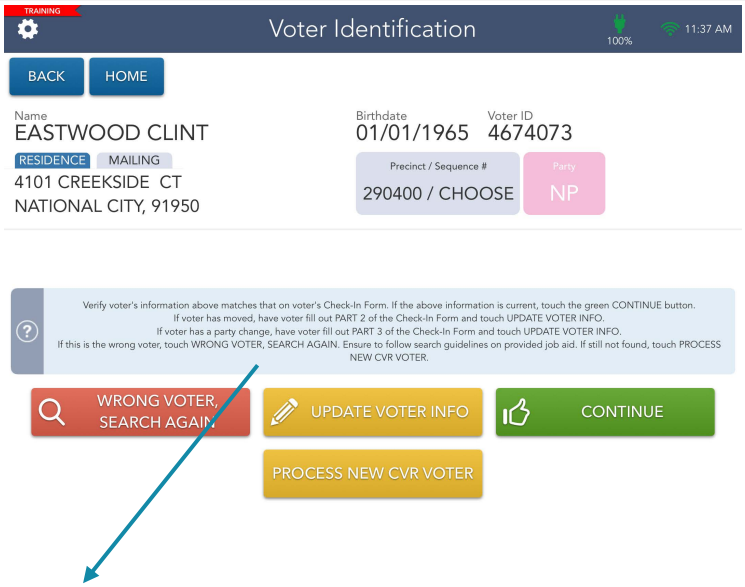
VBM Ballot Issued Voters

Voting in Person – "BMD" Voter Registered as NonPartisan (NP)

1

Once you have found the correct voter, their information will display on the **Voter Identification** screen.

Read all instructions in blue message box before proceeding. If voter information is current, select **CONTINUE** to begin processing them.



The blue message box states:

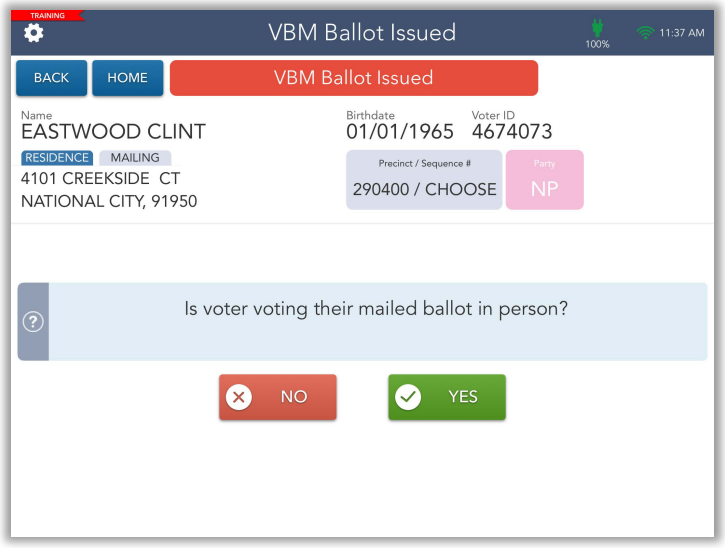
Verify voter's information above matches that on voter's Check-In Form. If the above information is current, touch the green CONTINUE button.
If voter has moved, have voter fill out Part 2 of the Check-In Form and touch UPDATE VOTER INFO.
If voter has a party change, have voter fill out PART 3 of the Check-In Form and touch UPDATE V)TER INFO.
If this is the wrong voter, touch WRONG VOTER, SEARCH AGAIN. Ensure to follow search guidelines on provided job aid. If still not found, touch PROCESS NEW CVR VOTER.

2

Ask the voter if they are voting on their mailed ballot in person.

If not, select **NO**.

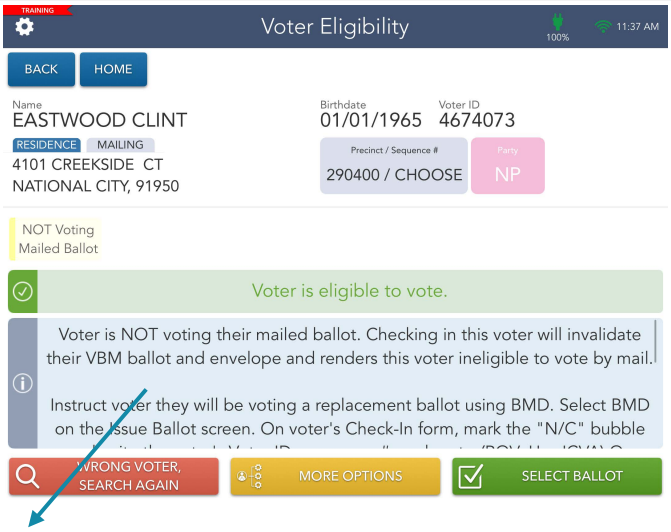
This voter will use the BMD to make their selections and cast their ballot.



3

If the voter is eligible to vote a regular ballot, the screen will display a green “Voter is eligible to vote” message. Scroll through the blue message box and follow the applicable instructions to process the voter, but understand we cannot do them all at this time - remember to do them when we can.

Touch **Select Ballot** to continue.



The blue message box states:

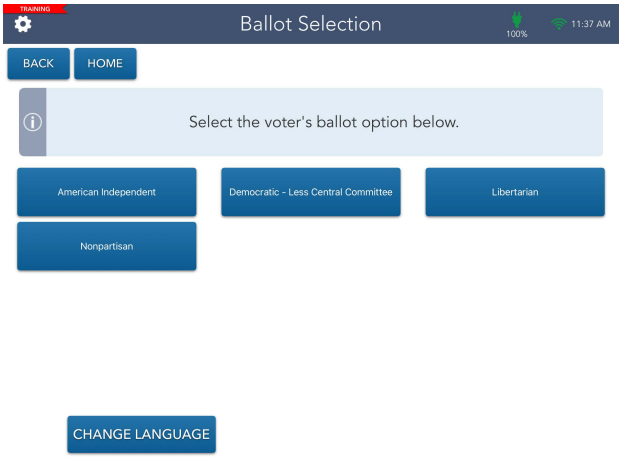
Voter is NOT voting their mailed ballot. Checking in this voter will invalidate their mail ballot and envelope and renders this voter ineligible to vote by mail.

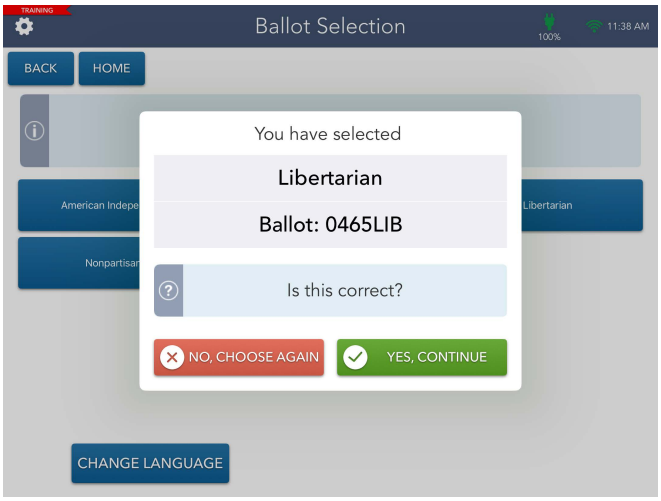
Instruct voter will be voting a BMD replacement ballot. Select BMD on the Issue Ballot screen. On voter’s Check-In form, mark the “N/C” bubble and write the voter’s Voter ID, sequence #, and party. On voter’s BMD Ticket, write voter’s sequence # and party.

4

The **Select Ballot Screen** will come up. Choose the selection that the Voter Chose on Part 1 of the Check-In Form. If they have not filled it out, ask them to do this now, using the Party Ballot Chart as necessary to help direct them.

As soon as you make the choice, a pop-up will tell you the sequence number with party that this voter gets, Write that on the BMD ticket and Check-In Form now. Then touch the Yes button. The screen flips immediately. Complete steps 4-8 on pages 10-11.





VBM Ballot Issued Voters

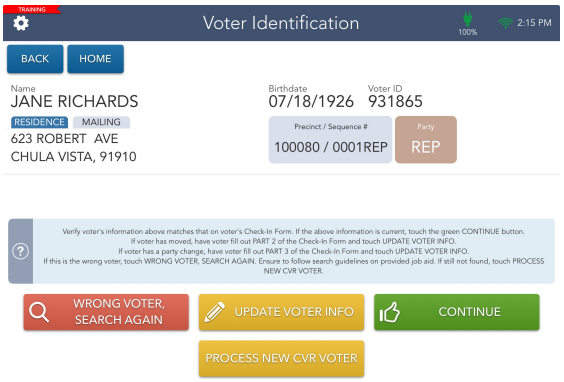
Voting in Person – "Non-BMD"

1

Once you have found the correct voter, their information will display on the **Voter Identification** screen.

Read all instructions in blue message box before proceeding. If voter information is current, select **CONTINUE** to begin processing them.

To view the message in the blue box, see page 9.

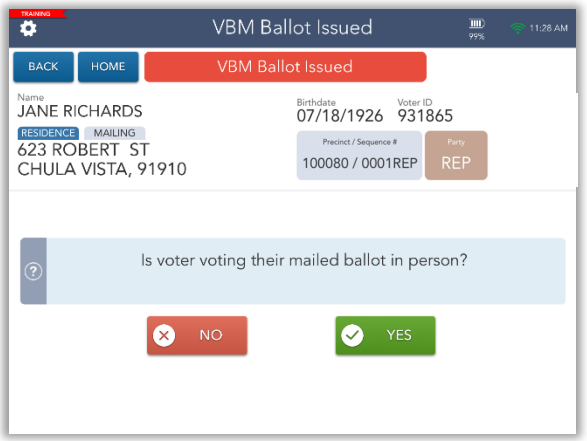


2

Ask the voter if they are voting on their mailed ballot in person.

If yes, verify the sequence number and party on the ePollbook matches the sequence number and party on the mailed ballot. If they match, select **YES**.

This voter will mark their selections on their official ballot that was mailed to them and cast it into the Ballot Box.

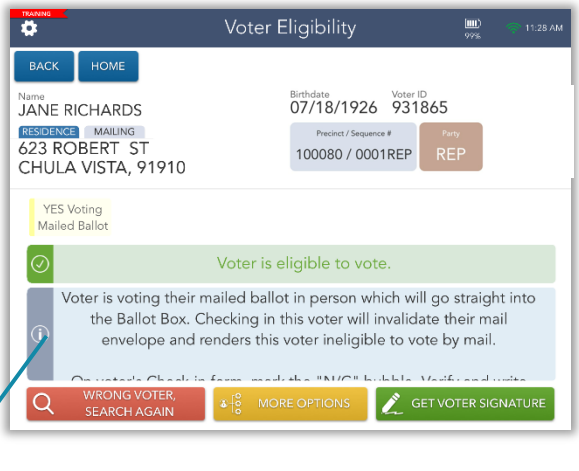


3

If the voter is eligible to vote via a regular ballot, the screen will display a green "Voter is eligible to vote" message.

Scroll through the blue message box and follow the applicable instructions to process the voter.

Select **GET VOTER SIGNATURE** to continue.



The blue message box states:

Voter is voting their mailed ballot in person which will go straight into the Ballot Box. Checking in this voter will invalidate their mail envelope and renders this voter ineligible to vote by mail.

On voter's Check-In form, mark the "N/C" bubble. Verify and write the voter's Voter ID, sequence #, and party. Select Non-BMD at the Issue Ballot screen.

If sequence number and/or party does not match, voter will vote on BMD. Select BMD at the Issue Ballot screen. Write "SURRENDERED" on the front of all the surrendered VBM ballot and envelope, tear all items in half, and place them in the brown box.
Touch the green button to continue.

4

The **Voter Signature** screen will appear.

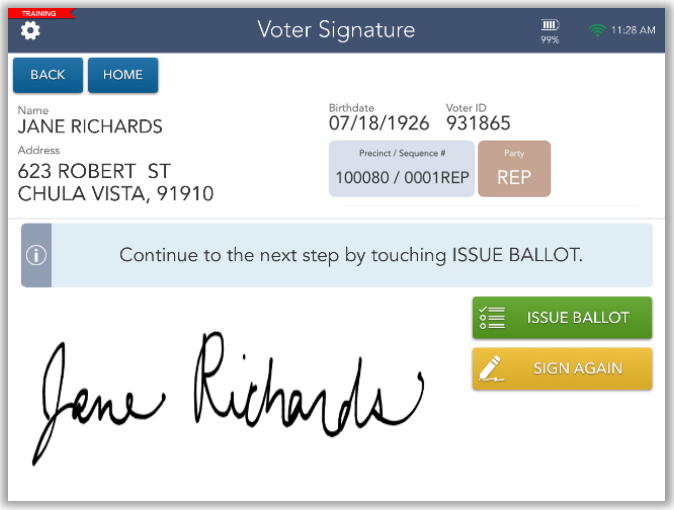
Complete the sequence number verification step with the voter prior to asking for their signature. Verify with voter that the Sequence Number and party from the EPB matches their voting materials.

Verify that the Check-In Form is signed.

Tilt the ePollbook screen toward the voter and have them sign. Once they have signed, they will need to select the **DONE** button.

5

Flip the screen back toward you. Select the **ISSUE BALLOT** button to continue.

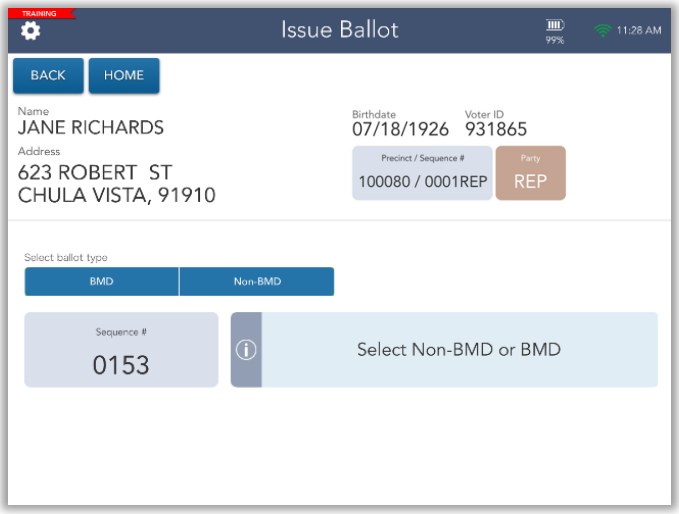


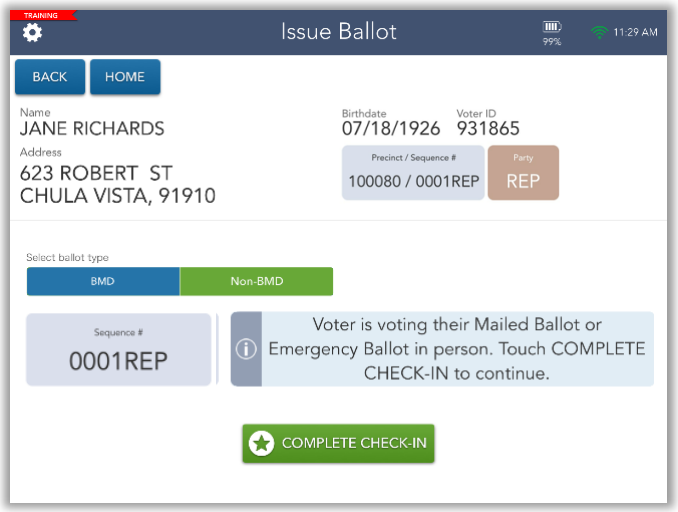
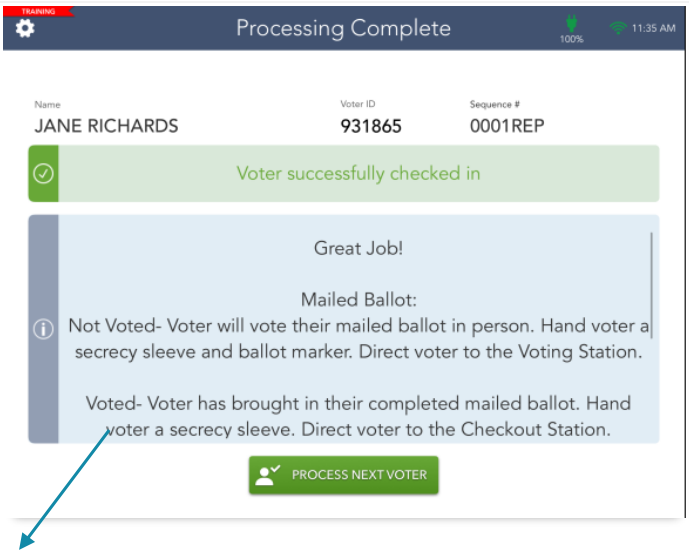
6

The ePollbook does not automatically select a ballot type for these voters, so you will need to do so manually.

Remember, this voter requested to vote on their mailed ballot.

Select **Non-BMD** under the **Select ballot type** field.



7	The **Non-BMD** ballot type button will turn **green** once it has been selected, then select **COMPLETE CHECK-IN.**	
8	Congratulations! The voter has been successfully checked in. Scroll through the blue message box and follow the applicable instructions. Select the **PROCESS NEXT VOTER** button and move on to the next voter.	
	The blue message box states: Great Job! Mailed Ballot: Not Voted- Voter will vote their mailed ballot in person. Hand voter a secrecy sleeve and ballot marker. Direct voter to the Voting Station. Voted- Voter has brought in their completed mailed ballot. Hand voter a secrecy sleeve. Direct voter to the Checkout Station.	

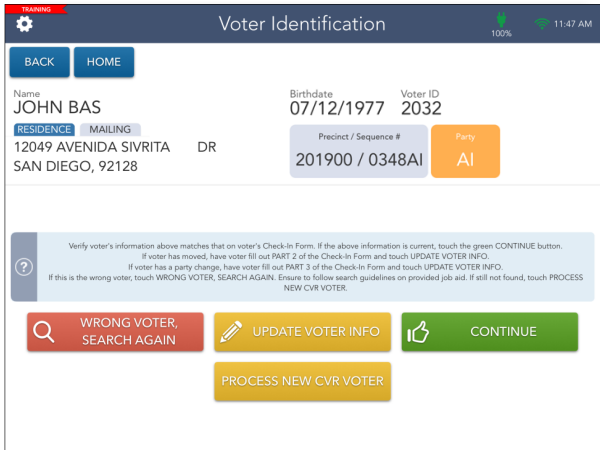
Voting in Person – "Non-BMD"- Emergency Ballot

1

Once you have found the correct voter, their information will display on the **Voter Identification** screen.

Read all instructions in blue message box before proceeding. If voter information is current, select **CONTINUE** to begin processing them.

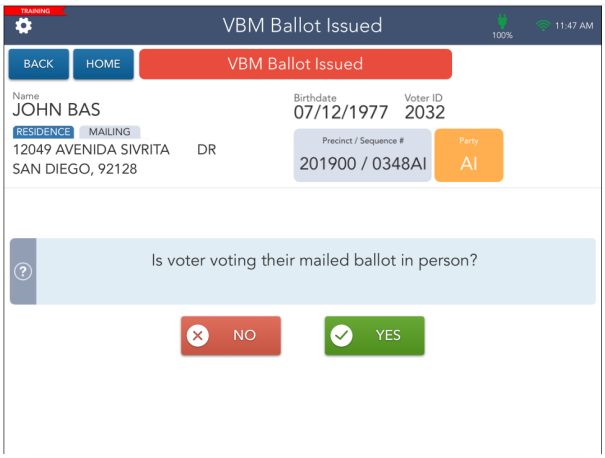
To view the message in the blue box, see page 9.



2

If a voter requests to vote on an Emergency Ballot, ensure that you have provided them with the information in the Poll Worker Manual on page 26. If the voter still insists on voting on an Emergency Ballot, select **NO**.

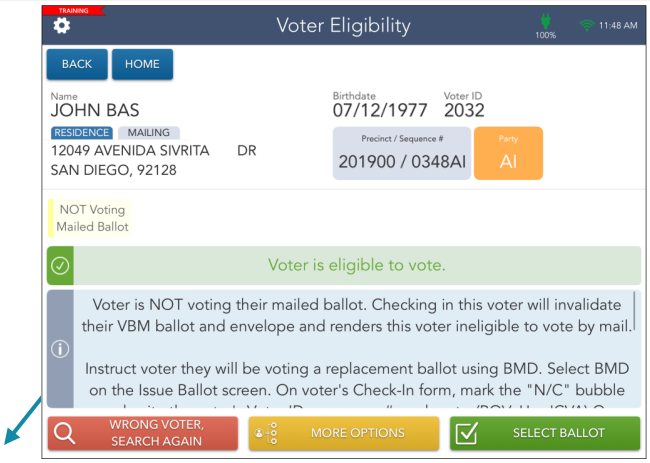
Also, if a voter is returning a completed Emergency Ballot, select **NO.**



3

If the voter is eligible to vote via a regular ballot, the screen will display a green "Voter is eligible to vote" message. Scroll through the blue message box and follow the applicable instructions to process the voter.

Select **GET VOTER SIGNATURE** or S**ELECT BALLOT** (NP voter) to continue.



The blue message box states:

Voter is NOT voting their mailed ballot. Checking in this voter will invalidate their mail ballot and envelope and renders this voter ineligible to vote by mail.

Instruct voter will be voting on BMD replacement ballot. Select BMD on the Issue Ballot screen. On voter's Check-In form, mark the "N/C" bubble and write the voter's Voter ID sequence #, and party. On voter's BMD Ticket, write voter's sequence # and party .

If voter is requesting an Emergency Ballot, write voter's sequence # and party on the ballot.
If voter is returning an Emergency Ballot, verify voter's sequence # and party.
In both situations, write "Emergency Ballot" on Check-In form. Select Non-BMD at the Issue Ballot screen.
Touch the green button to continue.

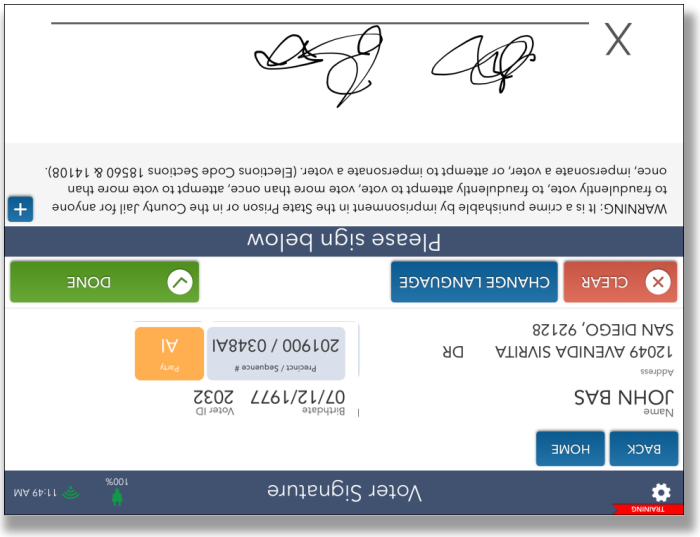
4

The **Voter Signature** screen will appear.

Complete the sequence number and party verification step with the voter prior to asking for their signature. Verify with voter that the Sequence Number and Party from the EPB matches their voting materials.

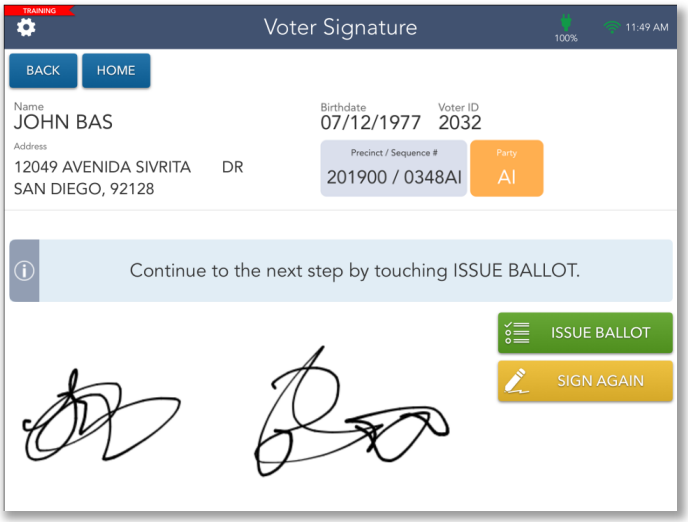
Verify the Check-In Form is signed.

Tilt the ePollbook screen toward the voter and have them sign. Once they have signed, they will need to select the **DONE** button.



5

Flip the screen back toward you. Select the **ISSUE BALLOT** button to continue.

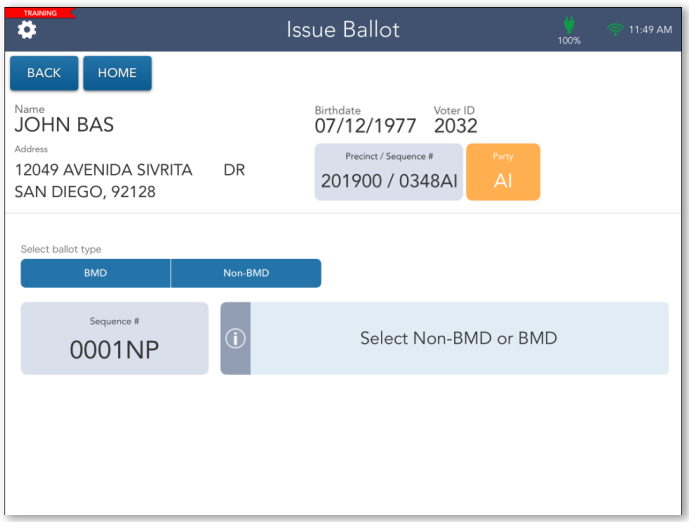


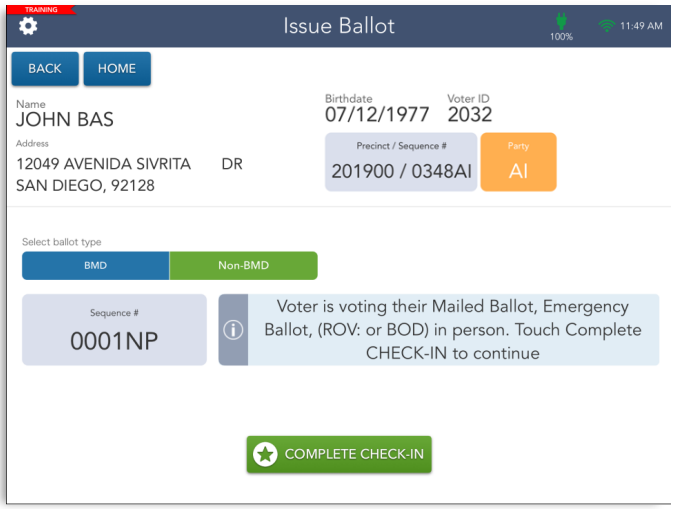
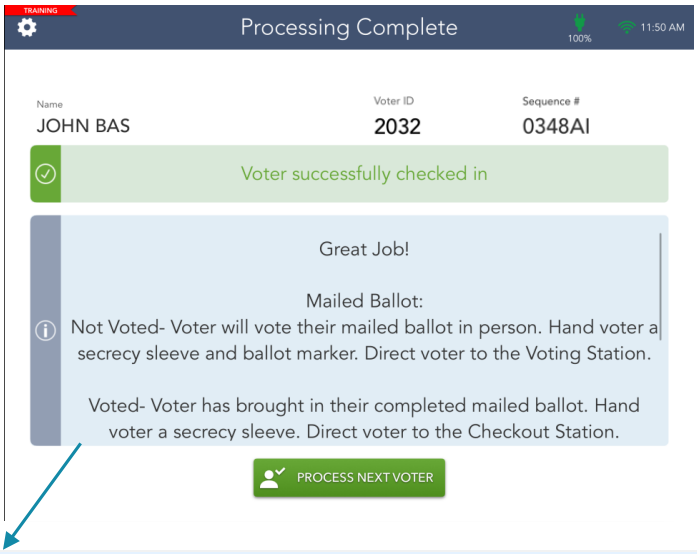
6

The ePollbook does not automatically select a ballot type for these voters, so you will need to do so manually.

Remember, this voter requested to vote on an Emergency Ballot.

Select **Non-BMD** under the **Select ballot type** field.



7	The **Non-BMD** ballot type button will turn **green** once it has been selected, then select **COMPLETE CHECK-IN.**	
8	Congratulations! The voter has been successfully checked in. Scroll through the blue message box and follow the applicable instructions. Select the **PROCESS NEXT VOTER** button and move on to the next voter.	

The blue message box states:

Great Job!

Emergency Ballot (ROV: or BOD):

Not Voted- Voter will vote an Emergency Ballot in person. Write Voter's sequence # on Emergency Ballot. Hand voter the Emergency Ballot, secrecy sleeve and pen. Direct voter to the Voting Station.

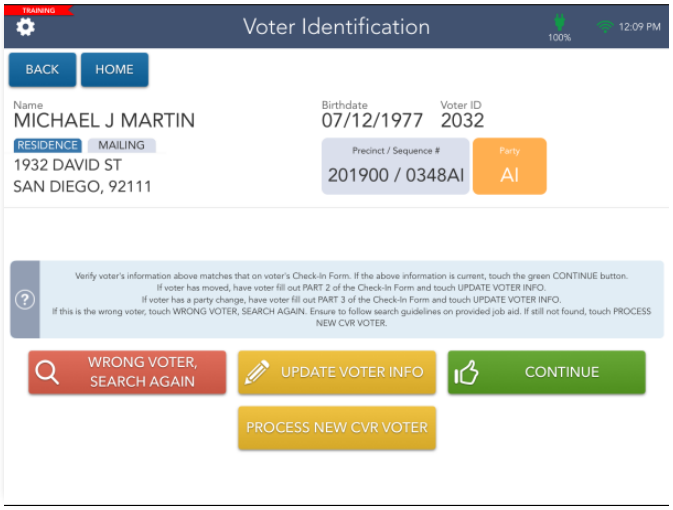
Voted- Voter has brought in their completed Emergency Ballot. Hand voter a secrecy sleeve. Direct voter to Checkout Station.

Residential Address Change (SB207)

1

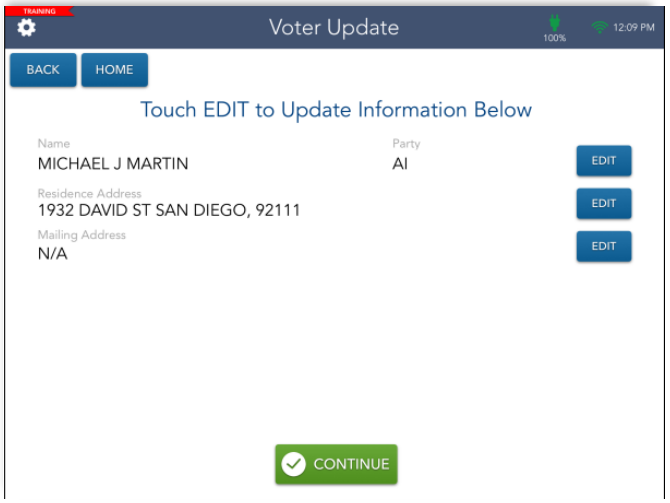
If a voter moved and their address on the Check-In Form does not match the address on the ePollbook, select the **UPDATE VOTER INFO** button on the **Voter Identification** screen. This process can also be initiated from the Voter Eligibility screen under MORE OPTIONS.

To view the message in the blue box, see page 9.



2

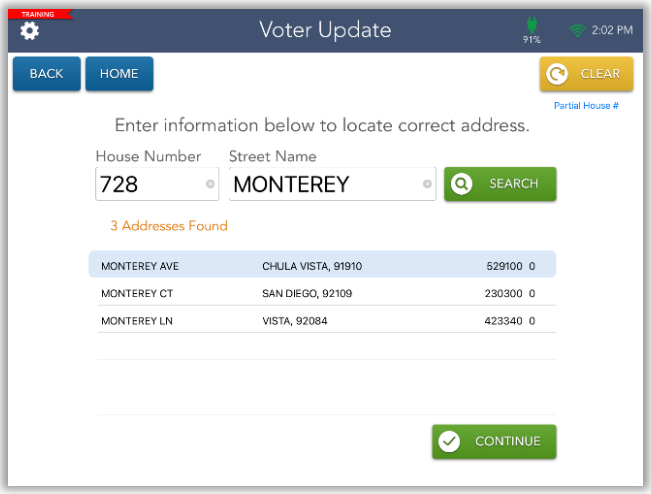
Select the **EDIT** button next to the **Residence Address** field.

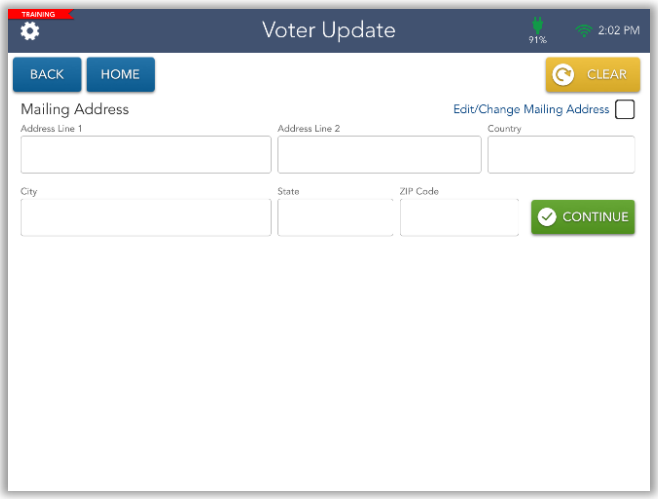
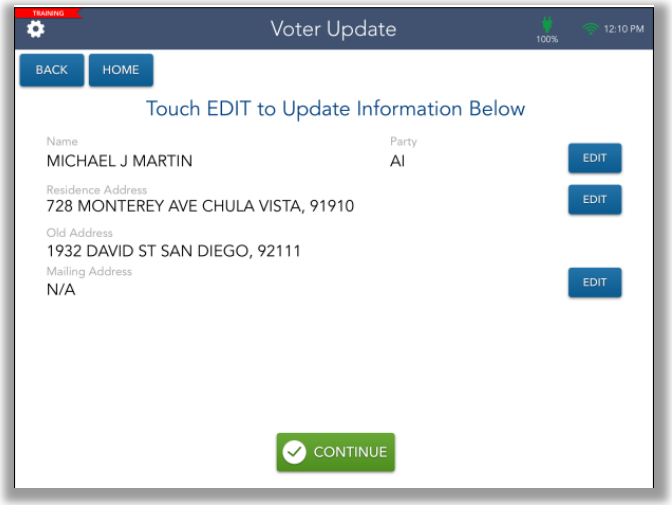


3

Enter the voter's **house number** and **street name** in the provided fields, then press the **SEARCH** button.

Select the voter's new address. It will highlight blue, then press the **CONTINUE** button.



4	If the voter's address includes an apartment or unit number, select **YES** to add this information. Otherwise, select **NO** to continue	
5	At the **Mailing Address** screen, select **CONTINUE** to move onto the next step. If a voter needs to update their mailing address, they can contact the ROV or go to SDVote.com.	
6	Confirm that all necessary fields have been updated then press **CONTINUE**.	

7

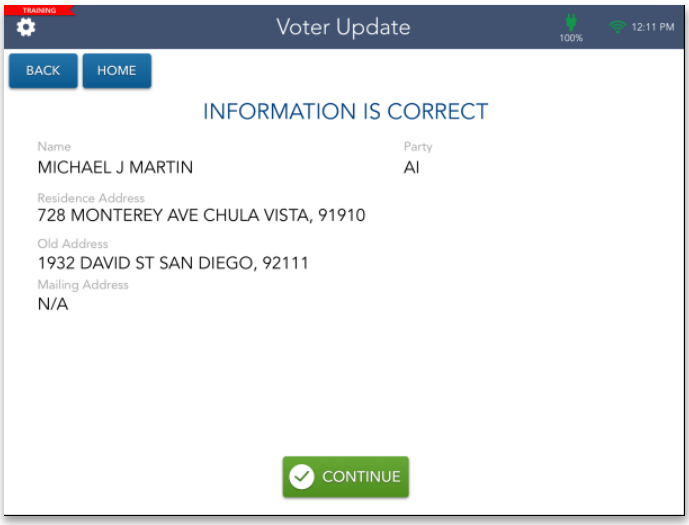
The screen will flip, allowing the voter to verify that their updated address is correct. Tilt the screen toward them.

If the updated address is correct, have the voter select **CORRECT**.

If it is incorrect, have voter select **NOT CORRECT** and repeat steps 2-6.

8

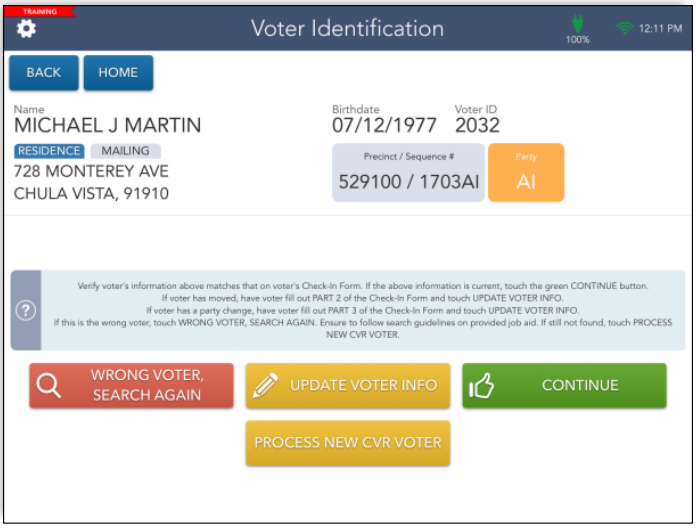
Once the voter has confirmed their updated address is correct, tilt the screen back toward you and select **CONTINUE**.



9

On the Voter Identification screen now that the voter's address has been updated, select **CONTINUE** to begin the check-in process and follow the steps on pages 9-11.

To view the message in the blue box, see page 9.



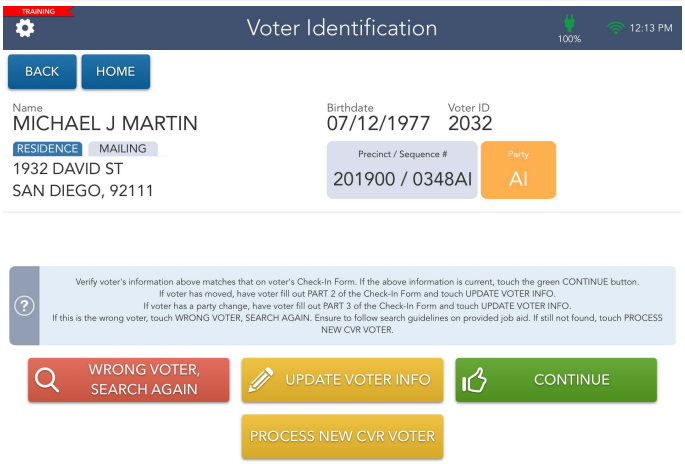
Political Party Change (SB207)

1

Once you have found the correct voter, their information will display on the **Voter Identification** screen.

Read all instructions in blue message box before proceeding. If voter information is current, but the voter has stated that they want to change Political Party, select **UPDATE VOTER INFO** to begin processing them.

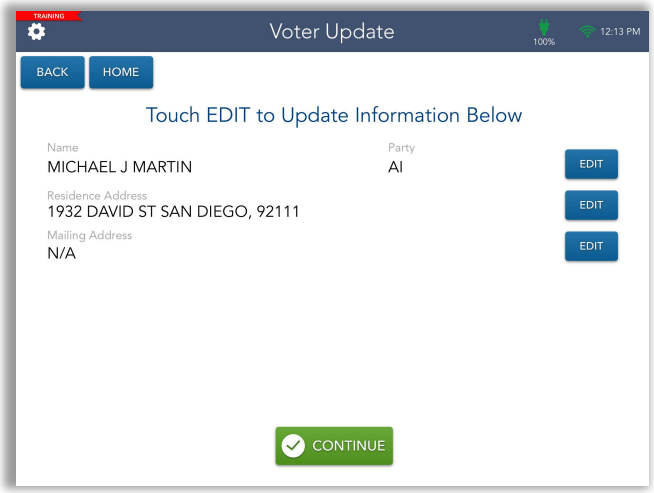
To view the message in the blue box, see page 9.



2

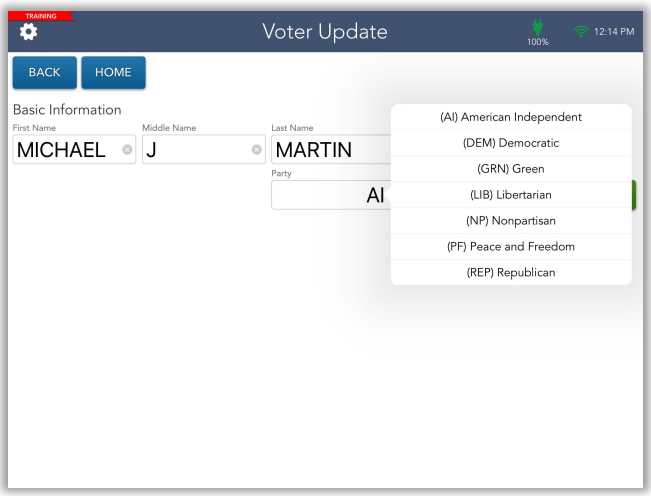
Have voter fill out PART 3 of the Check-In Form.

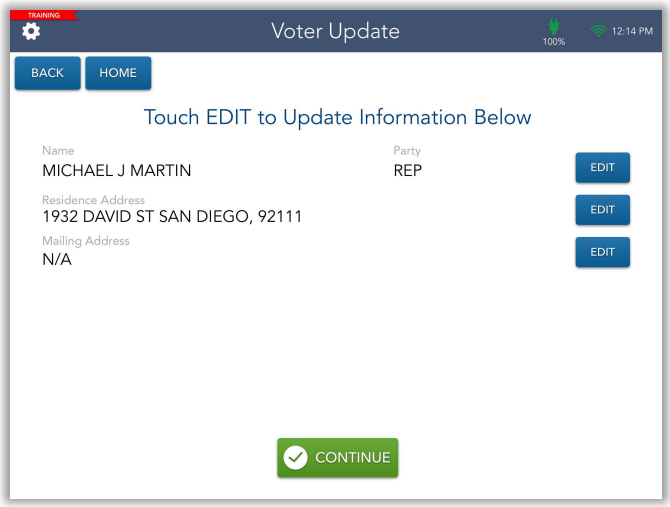
Select the **EDIT** button next to the first line.



3

Touch the down arrow after the Party affiliation box, a pop out will appear that lists options. Select the option that voter wrote on PART 3 of the Check-In Form by touching it. Touch CONTINUE.



4	Confirm that all necessary fields have been updated then press **CONTINUE**.	

5

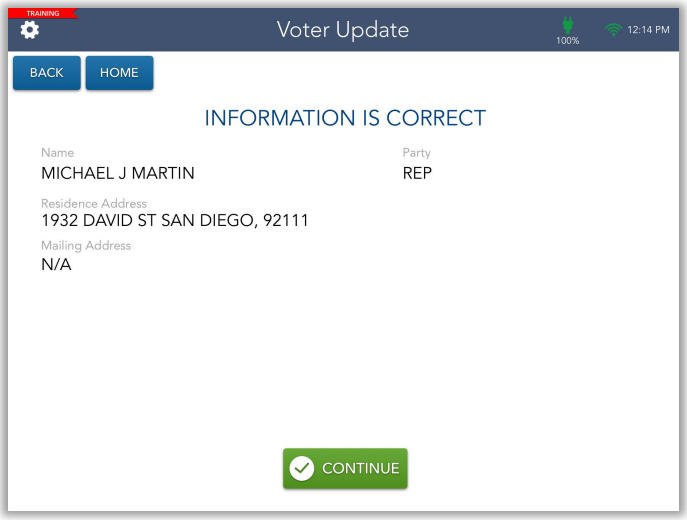
The screen will flip, allowing the voter to verify that their updated Party is their Party choice. Tilt the screen toward them.

If the updated party is correct, have the voter select **CORRECT**.

If it is incorrect, have voter select **NOT CORRECT** and repeat steps 2-4.

6

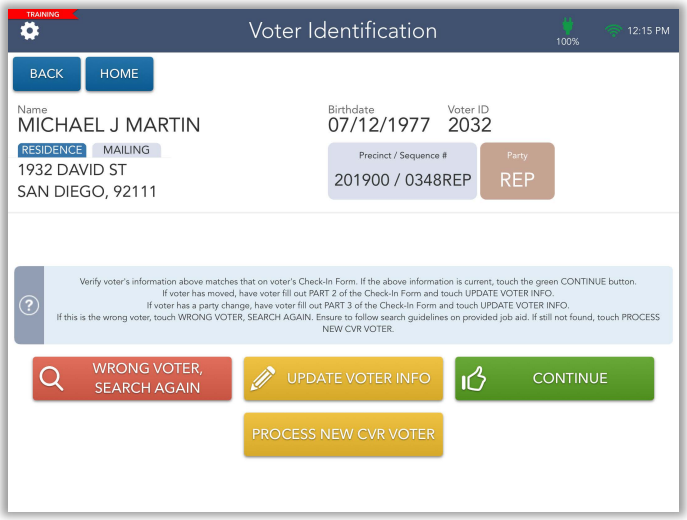
Once the voter has confirmed their updated party is correct, tilt the screen back toward you and select **CONTINUE**.



7

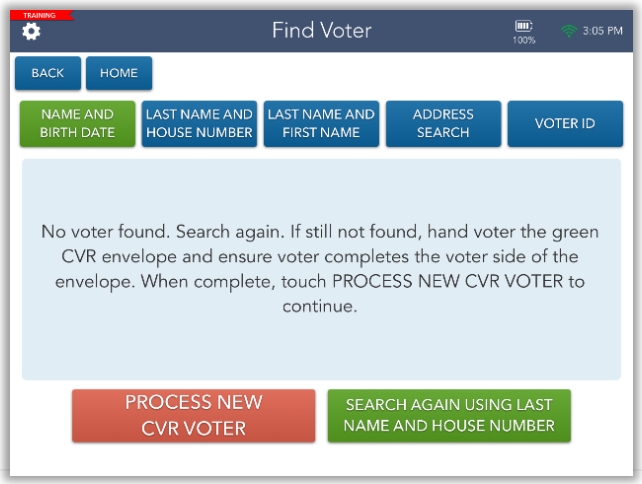
On the Voter Identification screen now that the voter's address has been updated, select **CONTINUE** to begin the check-in process and follow the steps on pages 9-11.

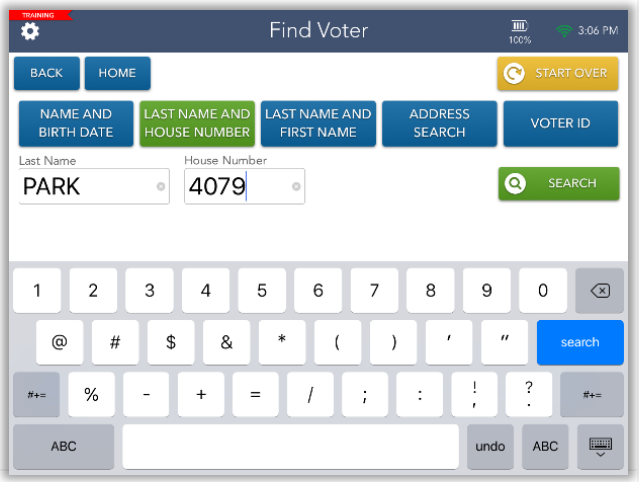
To view the message in the blue box, see page 9.



Conditional Voter Registration

1



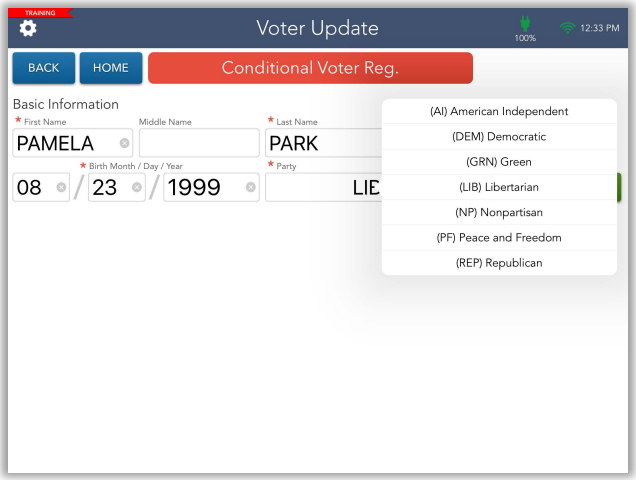


If a voter cannot be found in the ePollbook after using their name and birthdate, search again using one of the other four available options. If still not found, ask the voter if this is their first time voting in San Diego County. If so, you will process them as CVR by pressing the **PROCESS NEW CVR VOTER** button on the **Find Voter** screen.

2

Hand the voter a green CVR envelope and ask them to complete all section 2 neatly and completely.

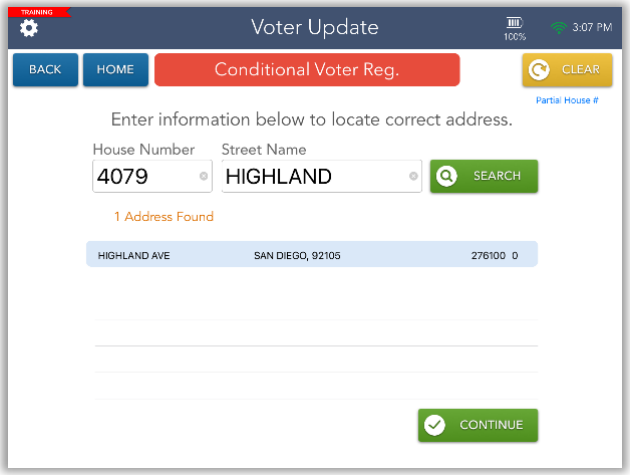
Using the voter's information on the check-in form enter the voter's **full name** and **date of birth** in the provided fields in the ePollbook. You are now completing voter registration on their behalf. Enter the party preference, indicated on the green CVR envelope. Party Preference is a drop out menu, Touch their choice to select. Then select **CONTINUE**.

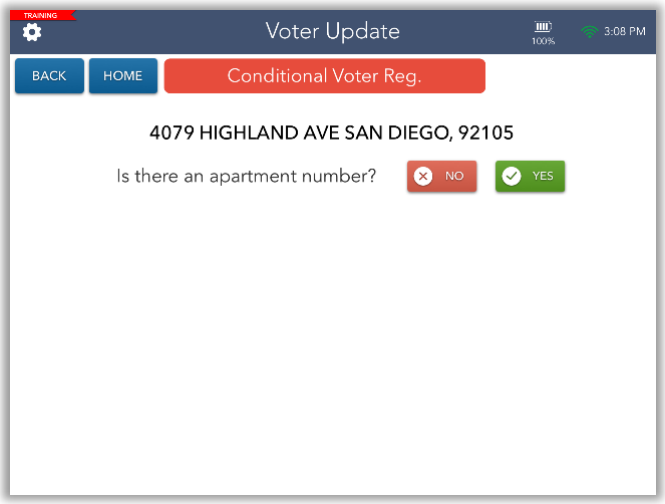
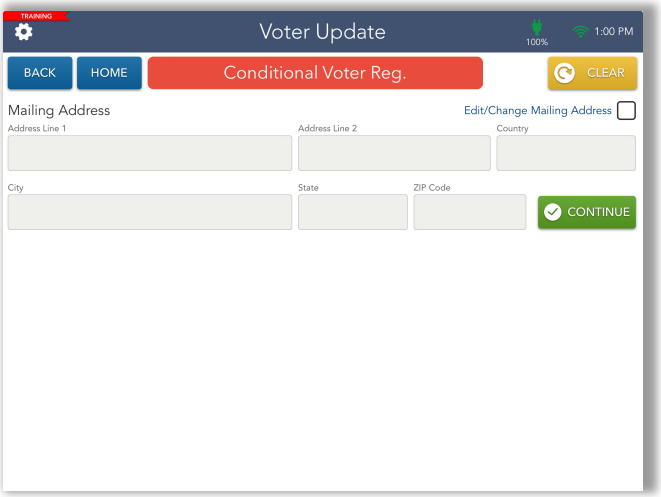


3

Enter the voter's **house number** and **street name** in the provided fields, then select the **SEARCH** button.

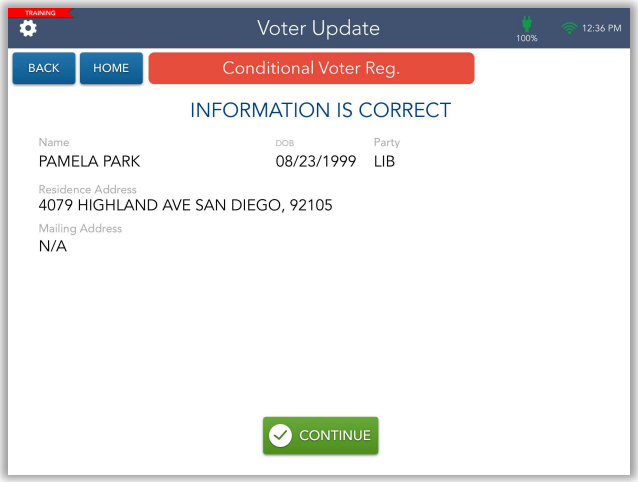
Select the voter's address, then press **CONTINUE**.



4	If the voter's address includes an apartment or unit number, select **YES** to add this information. Otherwise, select **NO** to continue.	
5	At the **Mailing Address** screen, select **CONTINUE** to move onto the next step. If a voter needs to update their mailing address, they can contact the ROV or go to SDVote.com.	
6	The screen will flip, allowing the voter to verify that their information is correct. Tilt the screen toward them. If the information is correct, have the voter select **CORRECT**. If it is incorrect, have voter select **NOT CORRECT**. This will allow you to make changes as needed.	

7

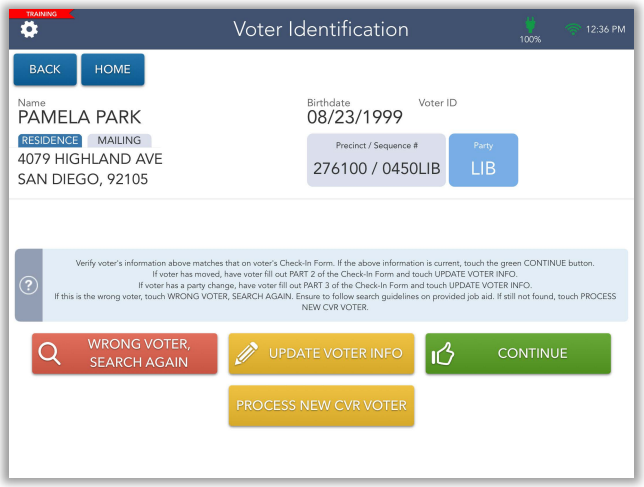
Once the voter has verified that their information is correct, tilt the screen back toward you and select **CONTINUE**.



8

Once you have completed the Conditional Voter Registration process, you will be redirected to the **Voter Identification** page. Notice that the voter's registration has been created. Select **CONTINUE**.

To view the message in the blue box, see page 9.

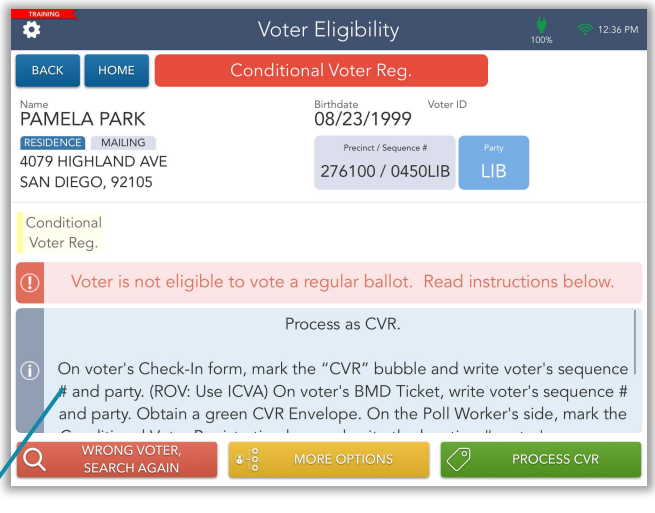


9

Scroll through the blue message box and follow the instructions to process them as a **CVR** voter.

In addition to the instructions in the blue box, write in 'which political party ballot is in envelope' in the box provided on the CVR envelope.

Select **PROCESS CVR** to continue.



The blue message box states:

Process as CVR. On voter's Check-In form, mark the "CVR" bubble and write voter's sequence # and party. On voter's BMD Ticket, write voter's sequence # and party. Obtain a green CVR Envelope. On the Poll Worker's side, mark the Conditional Voter Registration box and write the location #, voter's sequence #, and party. Ensure voter fills out the entire voter side including their signature. Touch the green button below to continue.

10

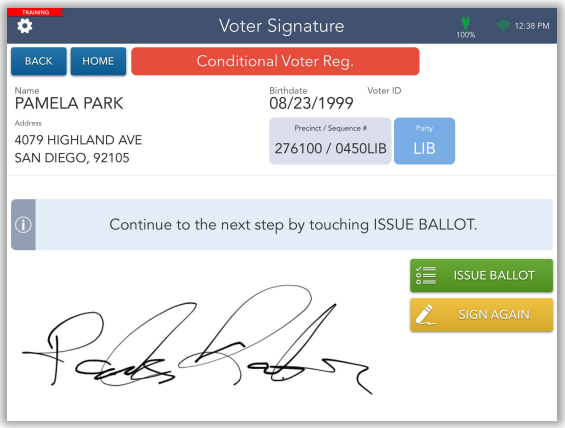
The **Voter Signature** screen will appear.

Complete the sequence number and party verification step with the voter prior to asking for their signature. Verify with voter that the Sequence Number and party from the EPB matches their voting materials.

Verify that the Check-In Form is signed.
Tilt the ePollbook screen toward the voter and have them sign. Once they have signed, they will need to select the **DONE** button.

11

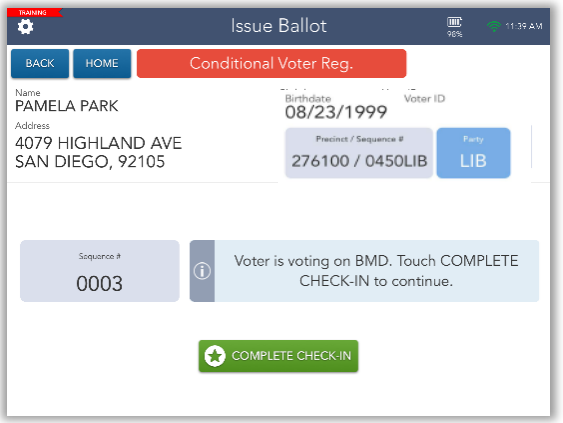
Flip the screen back toward you. Select the **ISSUE BALLOT** button to continue.



12

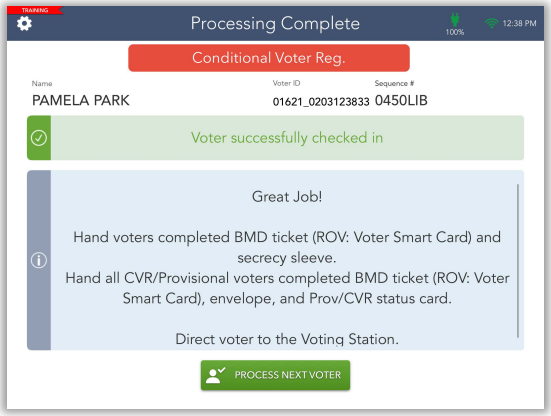
The voter's **Sequence #** will appear on the screen.

Review the procedures for the selected ballot type in the blue box then select **COMPLETE CHECK-IN**.



13

Congratulations! The voter has been successfully checked in. Complete all applicable instructions in the blue box as well as hand the voter a Provisional / Conditional Registration Status Ticket. Select the **PROCESS NEXT VOTER** button and move on to the next voter.



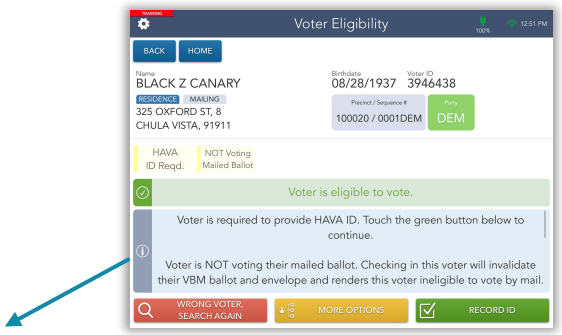
HAVA ID Required: Photo ID Provided

1

If a voter is flagged as needing to fulfill a HAVA ID requirement, they will need to provide a valid form of identification ID to vote regularly on Election Day.

See page 41 of the Poll Worker Manual for a list of acceptable list of identification that meet the HAVA ID requirement.

Select the **RECORD ID** button to continue.



The blue message box states:

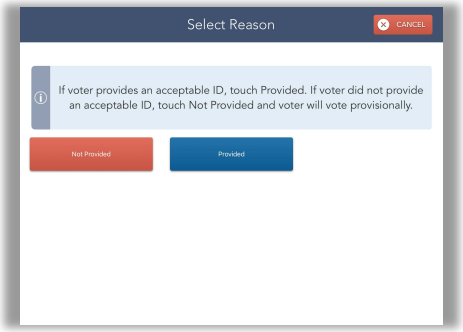
Voter is required to provide HAVA ID. Touch the green button below to continue.

Voter is NOT voting their mailed ballot. Checking in this voter will invalidate their mail ballot and envelope and renders this voter ineligible to vote by mail.

Instruct voter will be voting a BMD replacement ballot. Select BMD on the Issue Ballot screen. On voter's Check-In form, mark the "N/C" bubble and write the voter's Voter ID and sequence # and party. On voter's BMD Ticket, write voter's sequence # and party.

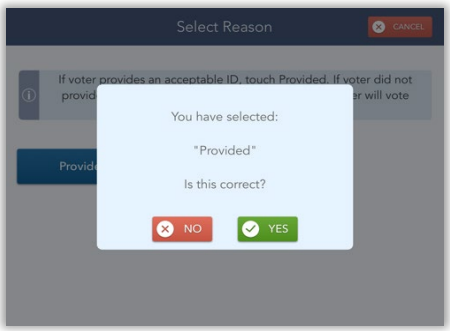
2

Select the **Provided** button if the voter has provided a valid form of photo ID.



3

A prompt will appear. Select **YES** to confirm that the voter has provided a valid form of photo ID.



4

The **Voter Signature** screen will appear.

Complete the sequence number verification step with the voter prior to asking for their signature. Verify with voter that the Sequence Number and party from the EPB matches their voting materials. Verify the Check-In Form is signed.

Tilt the ePollbook screen toward the voter and have them sign. Once they have signed, they will select the **DONE** button. Tilt the screen back toward you and continue processing them as a VBM Ballot Issued voter on pages 10-11.

No HAVA ID Provided

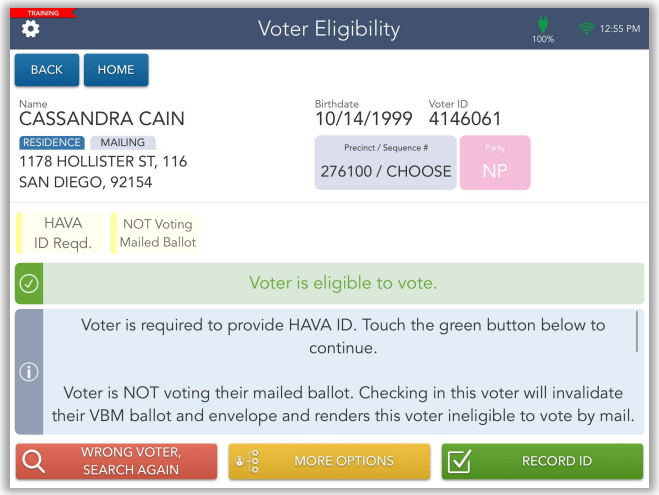
1

If a voter is flagged as needing to fulfill a HAVA ID requirement, they will need to provide a valid form of identification to vote regularly on election day.

If a voter does **not** provide a valid form of ID, they will need to be processed as a provisional voter.

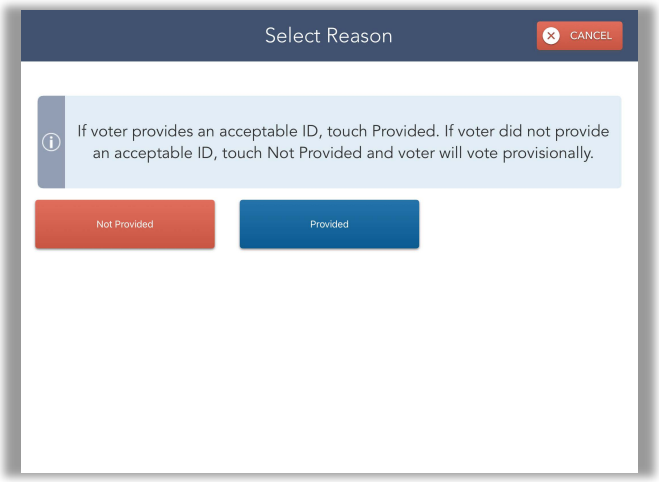
Select the **RECORD ID** button to continue.

To view the message in the blue box, see page 25.



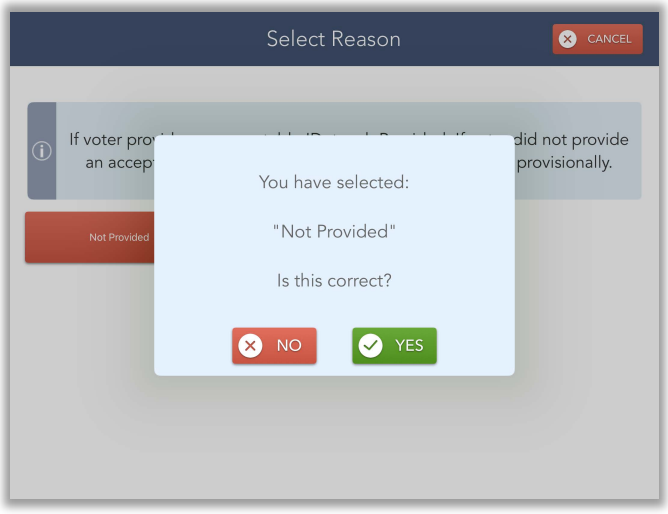
2

Select the **Not Provided** button.



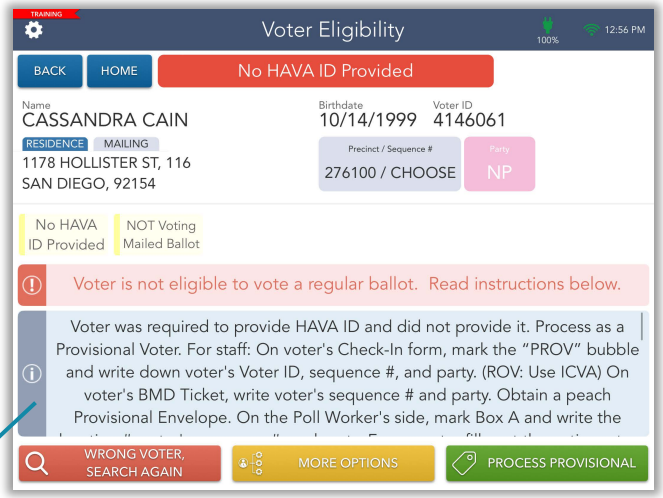
3

A prompt will appear. Select **YES** to confirm that the voter has **not** provided a valid form of photo ID.



4

You will be redirected to the **Voter Eligibility** page. Scroll through the blue message box and follow the instructions to process the voter. Select **PROCESS PROVISONAL**.



The blue message box states:

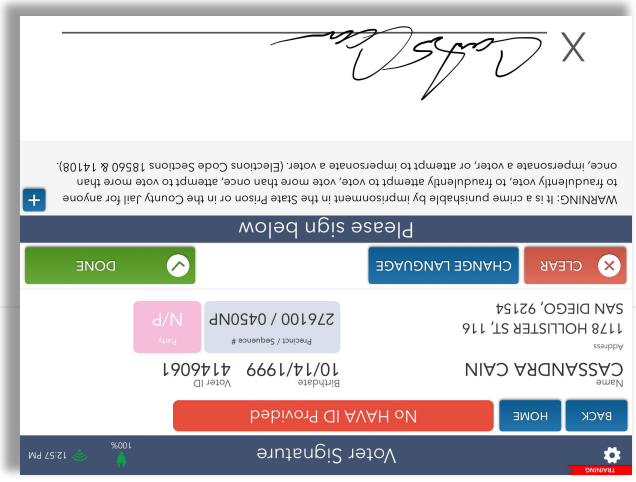
Voter was required to provide HAVA ID and did not provide it. Process as a Provisional Voter. For staff: On voter's Check-In form, mark the "PROV" bubble and write down voter's Voter ID and sequence # and party. On voter's BMD Ticket, write voter's sequence # and party. Obtain a peach Provisional Envelope. On the Poll Worker's side, mark Box A and write the voter's sequence # and party. Ensure voter fills out the entire voter side including their signature. Fill out location number and write which political party ballot is in the envelope. Touch the green button below to continue.

5

The **Voter Signature** screen will appear.

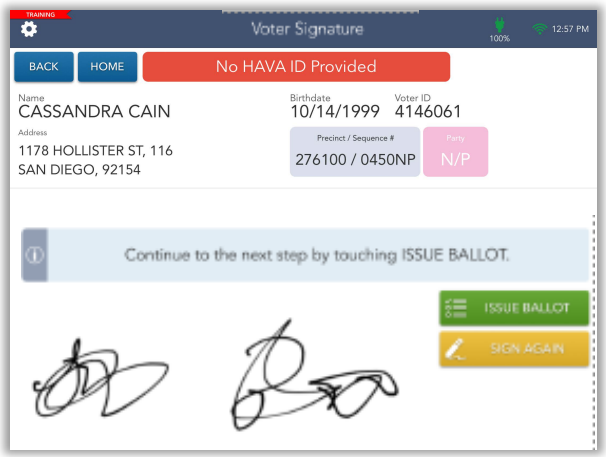
Complete the sequence number and party verification step with the voter prior to asking for their signature. Verify with voter that the Sequence Number and party from the EPB matches their voting materials. Verify that all of the voting materials reflect the same information as the Check-In Form and that the Check-In Form is signed

Tilt the ePollbook screen toward the voter and have them sign. Once they have signed, they will need to select the **DONE** button.



6

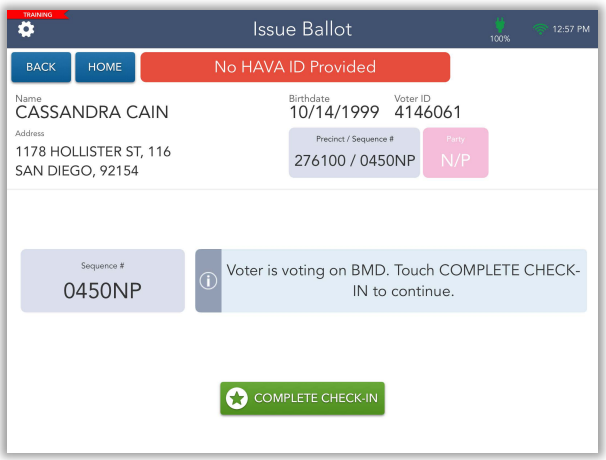
Tilt the screen back toward you and select the **ISSUE BALLOT** button to continue.



7

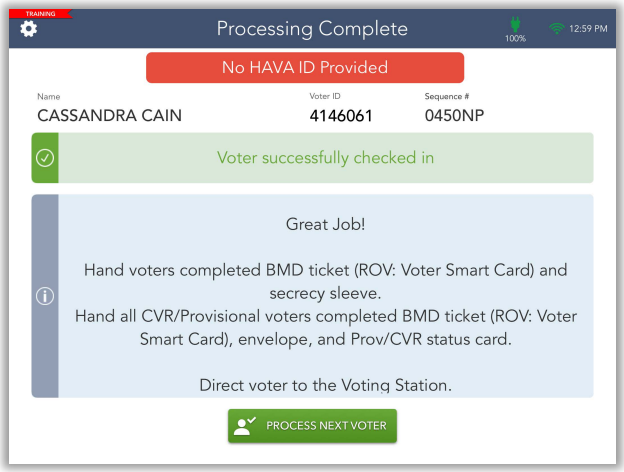
The voter's **Sequence #** and party will appear on the screen.

Review the procedures for the selected ballot type in the blue box then select **COMPLETE CHECK-IN.**



8

Congratulations! The voter has been successfully checked in. Complete all applicable instructions in the blue box then select the **PROCESS NEXT VOTER** button and move on to the next voter.



VBM Ballot Already Returned

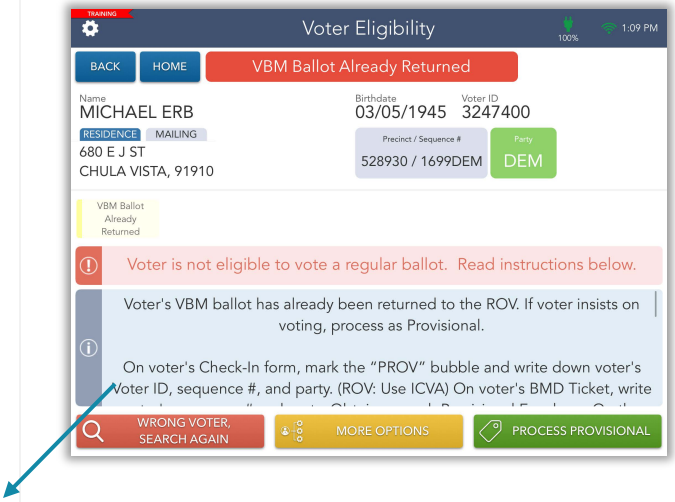
1

The ePollbook will identify any voter who has already returned their official ballot they received in the mail. However, if the voter still insists on voting at your vote center, you may process them as a **provisional** voter.

Scroll through the blue message box and follow the instructions to process the voter.

Hand the voter a peach Provisional envelope and ask them to complete section 2 neatly and completely. In addition to the instructions in the blue box, write 'which political party ballot is in envelope' as directed on the back of the envelope.

Select **PROCESS PROVISONAL**.



The blue message box states:

Voter's VBM ballot has already been returned to the ROV. If voter insists on voting, process as Provisional. For staff: On voter's Check-In form, mark the "PROV" bubble and write down voter's Voter ID, sequence #, and party. On voter's BMD Ticket, write voter's sequence # and party. Obtain a peach Provisional Envelope. On the Poll Worker's side, mark Box B and write the location, voter's sequence # and party. Ensure voter fills out the entire voter side including their signature. Touch the green button below to continue.

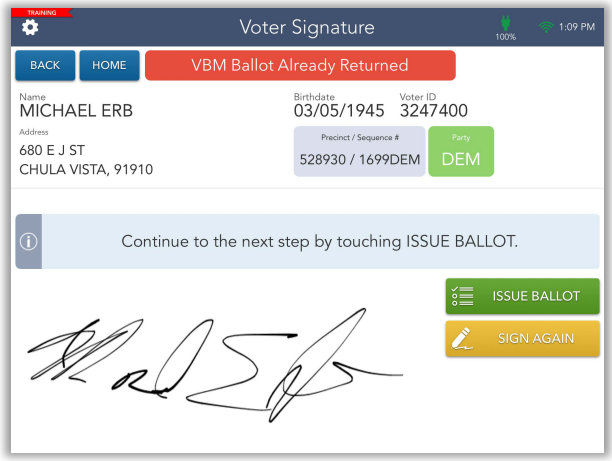
2

The **Voter Signature** screen will appear.

Tilt the ePollbook screen toward the voter and have them sign. Once they have signed, they will need to select the **DONE** button.

3

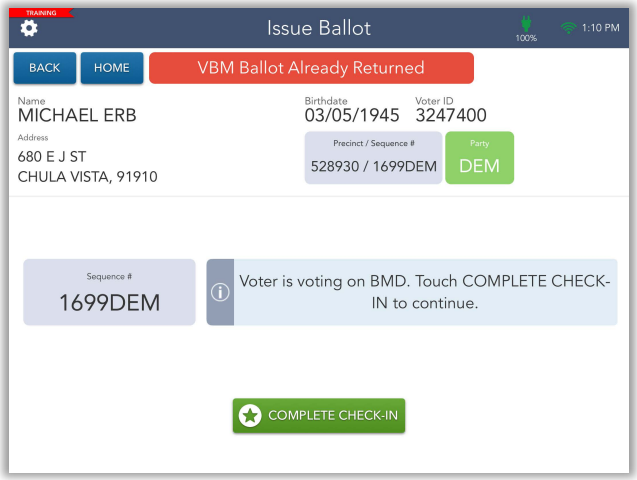
Tilt the screen back toward you and select the **ISSUE BALLOT** button to continue.



4

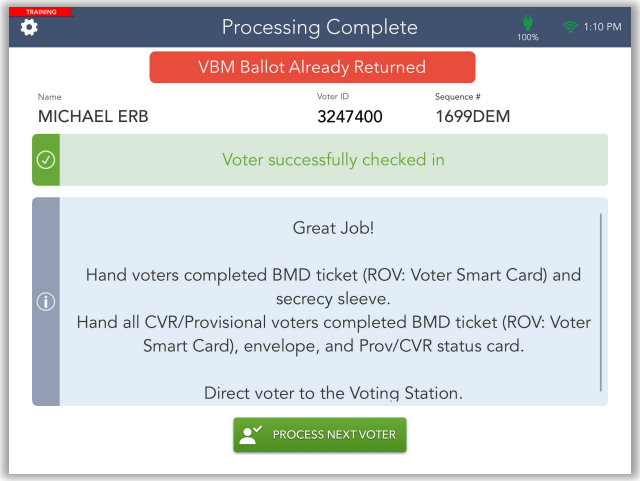
The voter's **Sequence #** and party will appear on the screen.

Review the procedures for the selected ballot type in the blue box then select **COMPLETE CHECK-IN.**



5

Congratulations! The voter has been successfully checked in. Complete all applicable instructions in the blue box then select the **PROCESS NEXT VOTER** button and move on to the next voter.



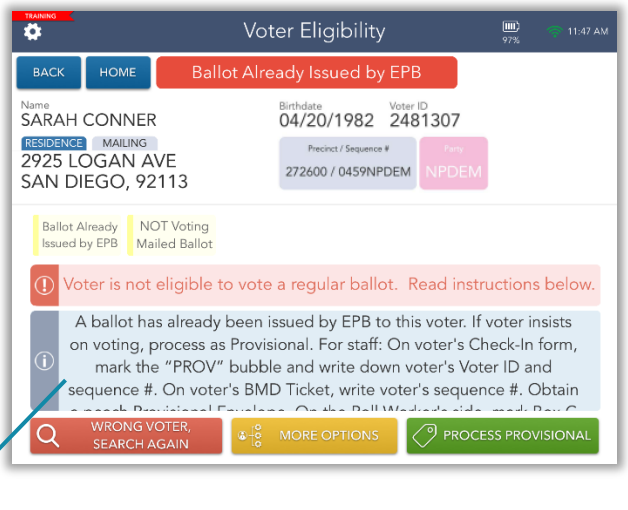
Ballot Already Issued by EPB

1

The ePollbook will identify any voter who has already voted during this election. However, if the voter still insists on voting at your vote center, you may process them as a **provisional** voter.

Hand the voter a peach Provisional envelope and ask them to complete section 2 neatly and completely. In addition to the instructions in the blue box, write 'which political party ballot is in envelope' where indicated on the Provisional envelope.

Scroll through the blue message box and follow the instructions to process the voter. Select **PROCESS PROVISONAL**.



The blue message box states:

A ballot has already been issued by EPB to this voter. If voter insists on voting, process as Provisional. For staff: On voter's Check-In form, mark the "PROV" bubble and write down voter's Voter ID, sequence #, and party. On voter's BMD Ticket, write voter's sequence # and party. Obtain a peach Provisional Envelope. On the Poll Worker's side, mark Box C and write the location, voter's sequence # and party. Ensure voter fills out the entire voter side including their signature. Touch the green button below to continue.

2

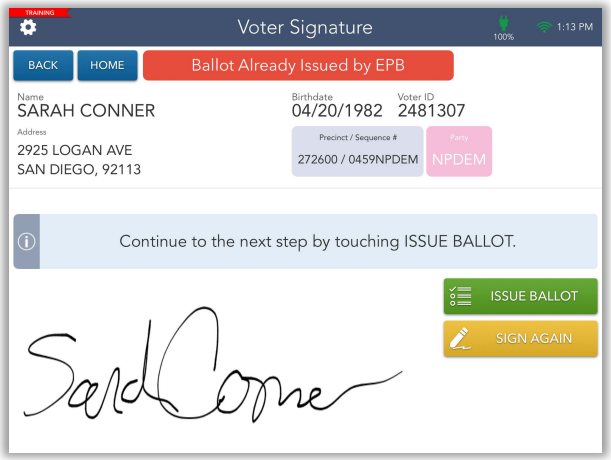
The **Voter Signature** screen will appear.

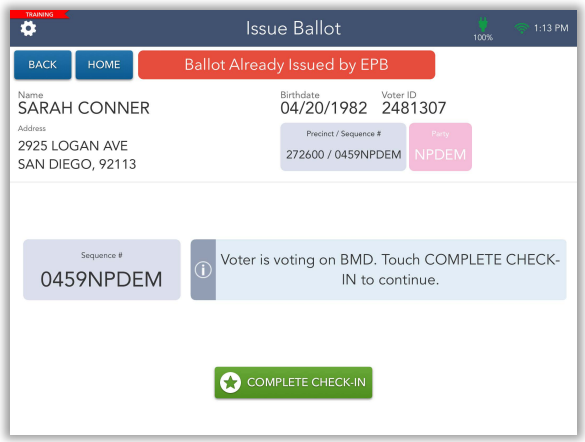
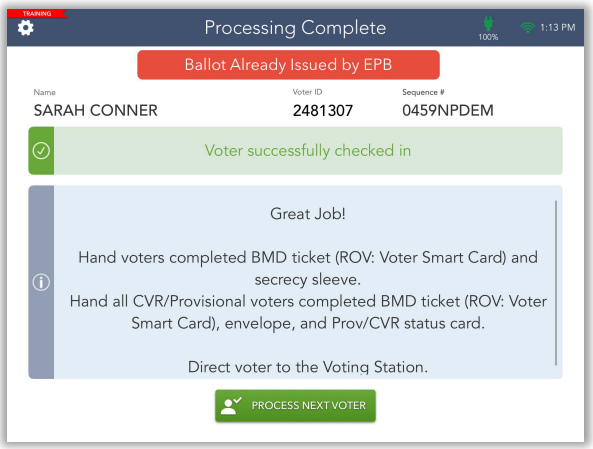
Complete the sequence number and party verification step with the voter prior to asking for their signature.

Tilt the ePollbook screen toward the voter and have them sign. Once they have signed, they will need to select the **DONE** button.

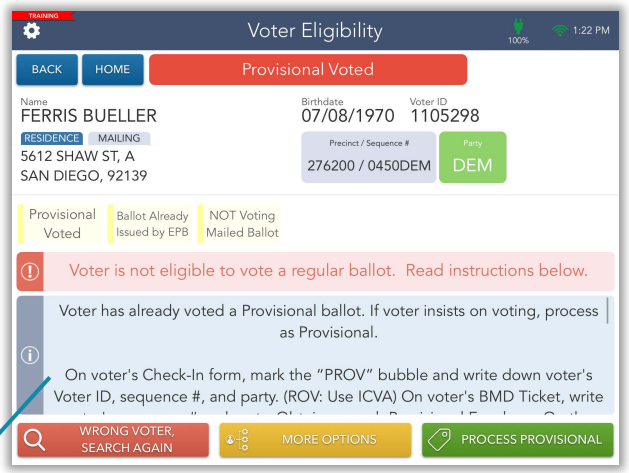
3

Tilt the screen back toward you and select the **ISSUE BALLOT** button to continue.



4	The voter's **Sequence # and party** will appear on the screen. Review the procedures for the selected ballot type in the blue box then select **COMPLETE CHECK-IN.**	
5	Congratulations! The voter has been successfully checked in. Complete all applicable instructions in the blue box then select the **PROCESS NEXT VOTER** button and move on to the next voter.	

Provisional Voted

1	The ePollbook will identify any voter who has already voted provisionally during this election. However, if the voter still insists on voting at your vote center, you may process them as a **provisional** voter. Hand the voter a peach Provisional envelope and ask them to complete all section 2 neatly and completely. In addition to the instructions in the blue box, write 'which political party ballot is in envelope' as directed on the back of the envelope. Scroll through the blue message box and follow the instructions to process the voter. Select **PROCESS PROVISONAL**.	

The blue message box states:

Voter has already voted a Provisional ballot. If voter insists on voting, process as Provisional. For staff: On voter's Check-In form, mark the "PROV" bubble and write down voter's Voter ID, sequence #, and party. On voter's BMD Ticket, write voter's sequence # and party. Obtain a peach Provisional Envelope. On the Poll Worker's side, mark Box C and write the location, voter's sequence # and party. Ensure voter fills out the entire voter side including their signature. Touch to continue.

2

The **Voter Signature** screen will the green button below appear.

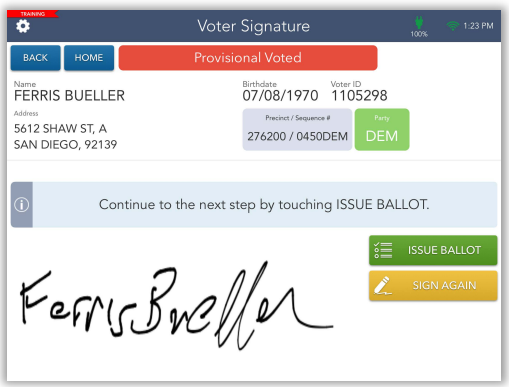
Complete the sequence number and party verification step with the voter prior to asking for their signature.

Verify the Check – In Form is signed.

Tilt the ePollbook screen toward the voter and have them sign. Once they have signed, they will need to select the **DONE** button.

3

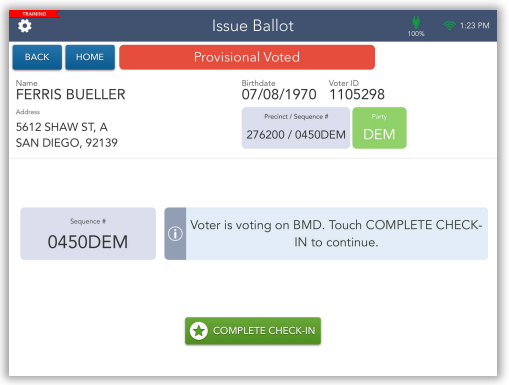
Tilt the screen back toward you and select the **ISSUE BALLOT** button to continue.



4

The voter's **Sequence #** and party will appear on the screen.

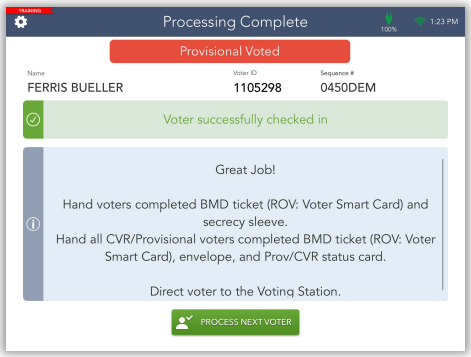
Review the procedures for the selected ballot type in the blue box then select **COMPLETE CHECK-IN.**



5

Congratulations! The voter has been successfully checked in.

Complete all applicable instructions in the blue box then select the **PROCESS NEXT VOTER** button and move on to the next voter.



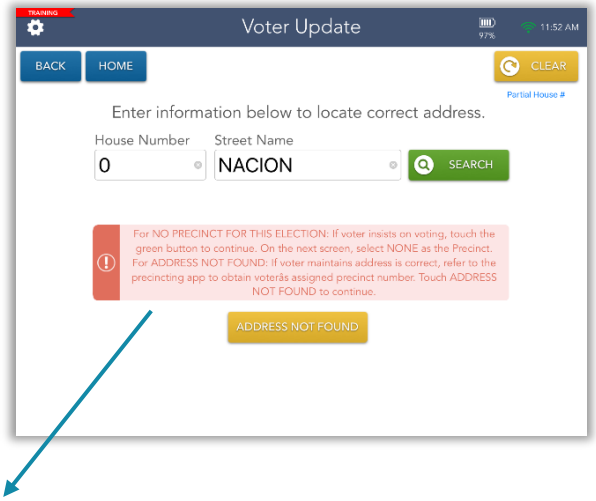
Unconfirmed Address

1

If a registered voter provides an invalid address or one that cannot be found but insists that it is correct, you can manually enter it when updating their information. Process them as a **Provisional** voter.

Hand the voter a peach Provisional envelope and ask them to complete all section 2 neatly and completely. In addition to the instructions in the blue box write 'which political party ballot is in envelope' as directed on the back of the envelope.

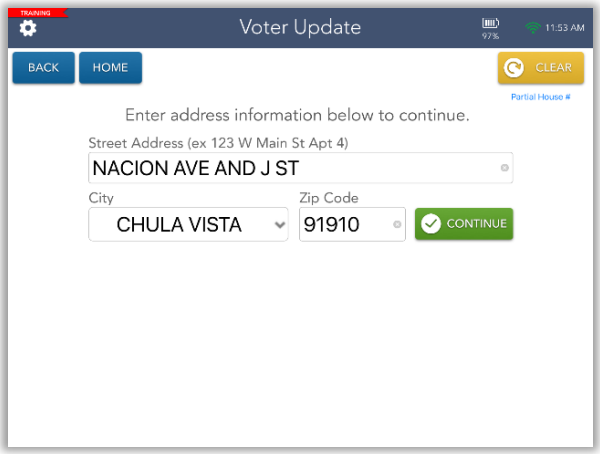
If EPB does not recognize the address an **ADDRESS NOT FOUND** button will appear. Check for typos. Select this button to begin updating the voter's address.



For ADDRESS NOT FOUND: If voter insists address is correct, refer to the precincting app to obtain voter's assigned precinct number. Touch ADDRESS NOT FOUND to continue.

2

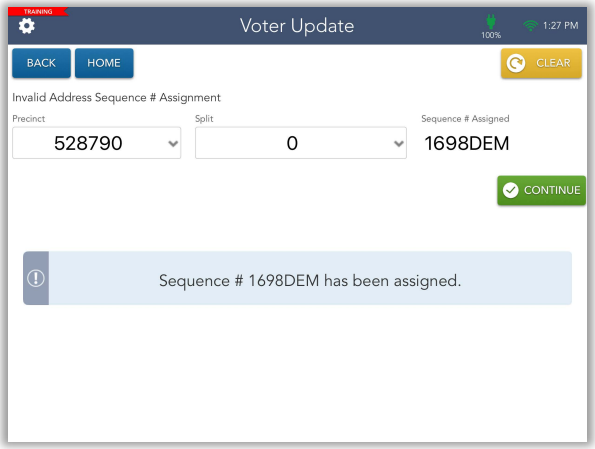
Enter the address provided by the voter on the Check-In Form, then select **CONTINUE**.

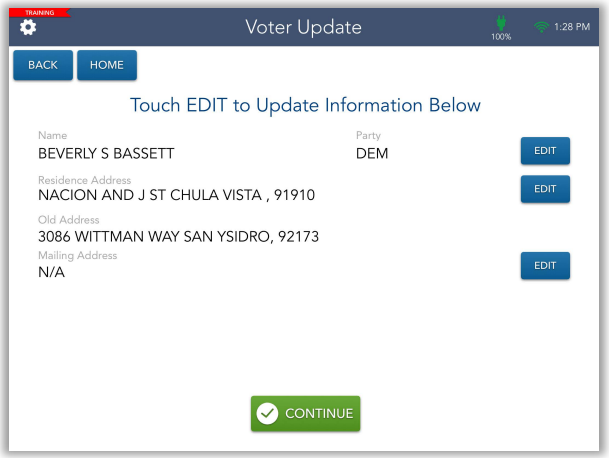
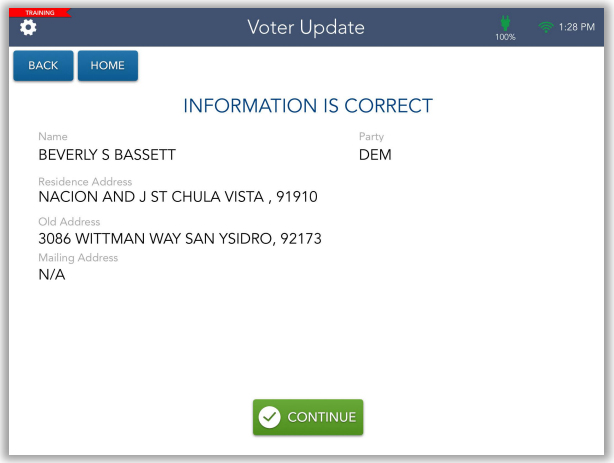


3

The Site Manager will use the **Precincting Application** on the laptop to determine the correct precinct for this voter. Select it from the **Precinct** dropdown, and this will assign the voter a **Sequence #**.

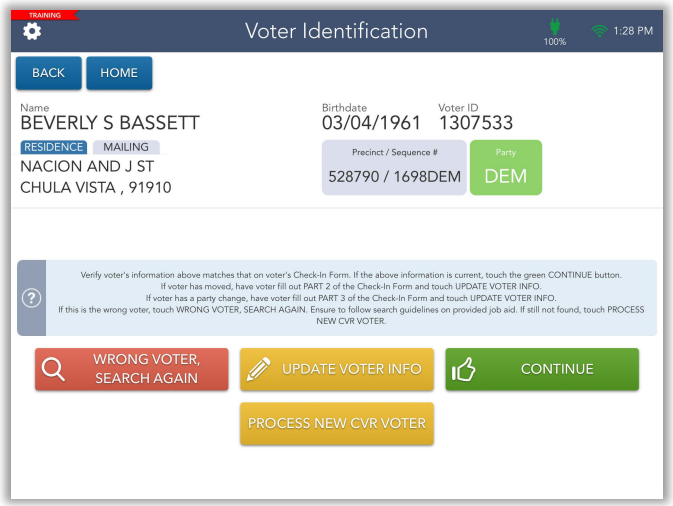
Once you have done this, select **CONTINUE**.



4	Confirm that all necessary fields have been updated then select **CONTINUE**.	
5	The screen will flip, allowing the voter to verify that their updated address is correct. Tilt the screen toward them. If the updated address is correct, have the voter select **CORRECT**. If it is incorrect, have voter select **NOT CORRECT**. This will allow you to make changes as needed.	
6	Once the voter has confirmed their updated address, tilt the screen back toward you and select **CONTINUE**.	

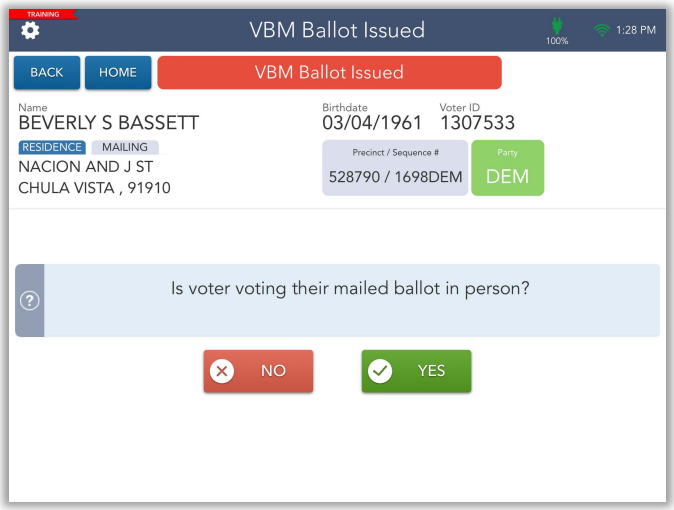
7

Once the voter's address has been updated, you will be able to process them as a **Provisional** voter. Select **CONTINUE** to begin this process.



8

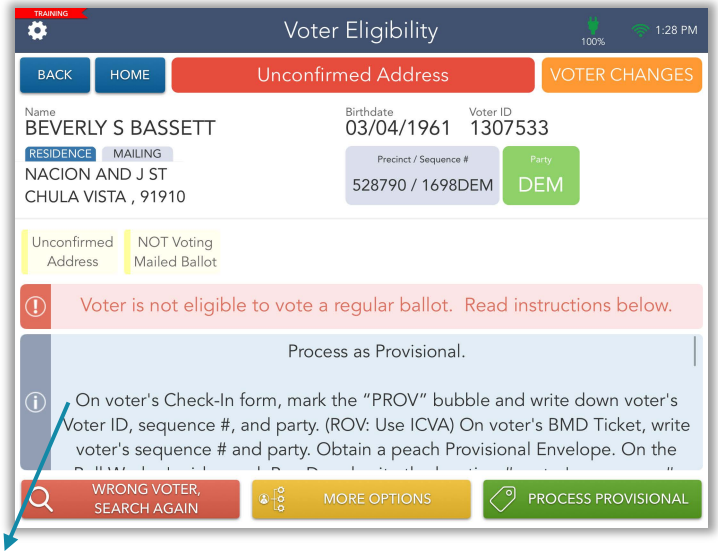
This voter was issued a VBM Ballot but is being processed as a **Provisional** voter. Since they will vote on the **BMD,** select **NO**.



9

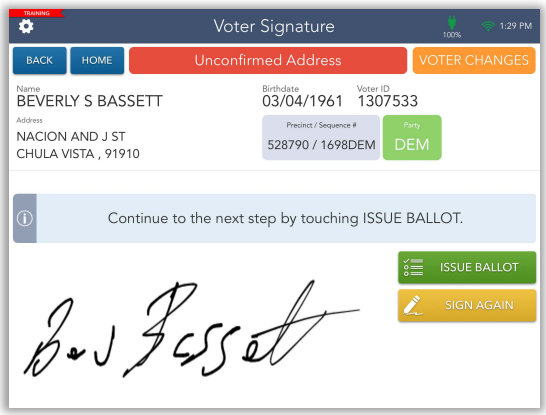
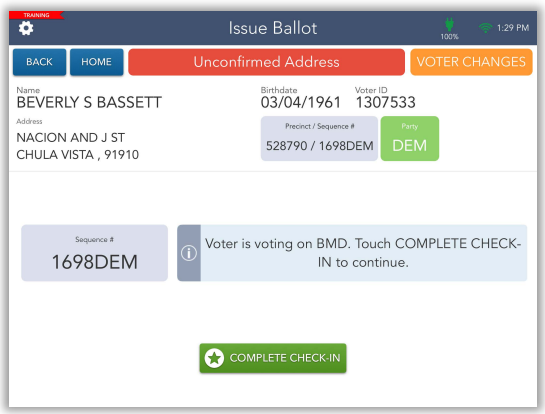
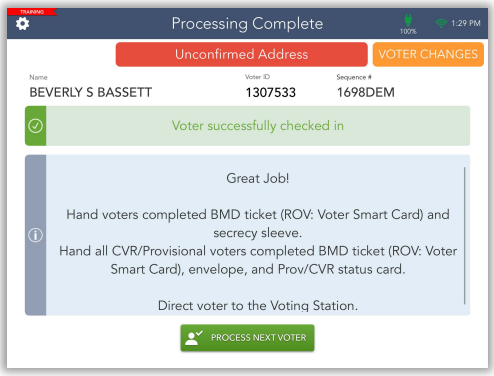
A yellow **Unconfirmed Address** flag displays on the **Voter Eligibility** page for voters whose addresses could not be verified.

Scroll through the blue message box and follow the instructions to process the voter. In addition, fill out 'which political party ballot is in the envelope'. Select **PROCESS PROVISONAL**.



The blue message box states:

Process as Provisional. On voter's Check-In form, mark the "PROV" bubble and write down voter's Voter ID and sequence # and party. On voter's BMD Ticket, write voter's sequence # and party. Obtain a peach Provisional Envelope. On the Poll Worker's side, mark Box D and write the location #, voter's sequence#, and party. Ensure voter fills out the entire voter side including their signature. Touch the green button below to continue.

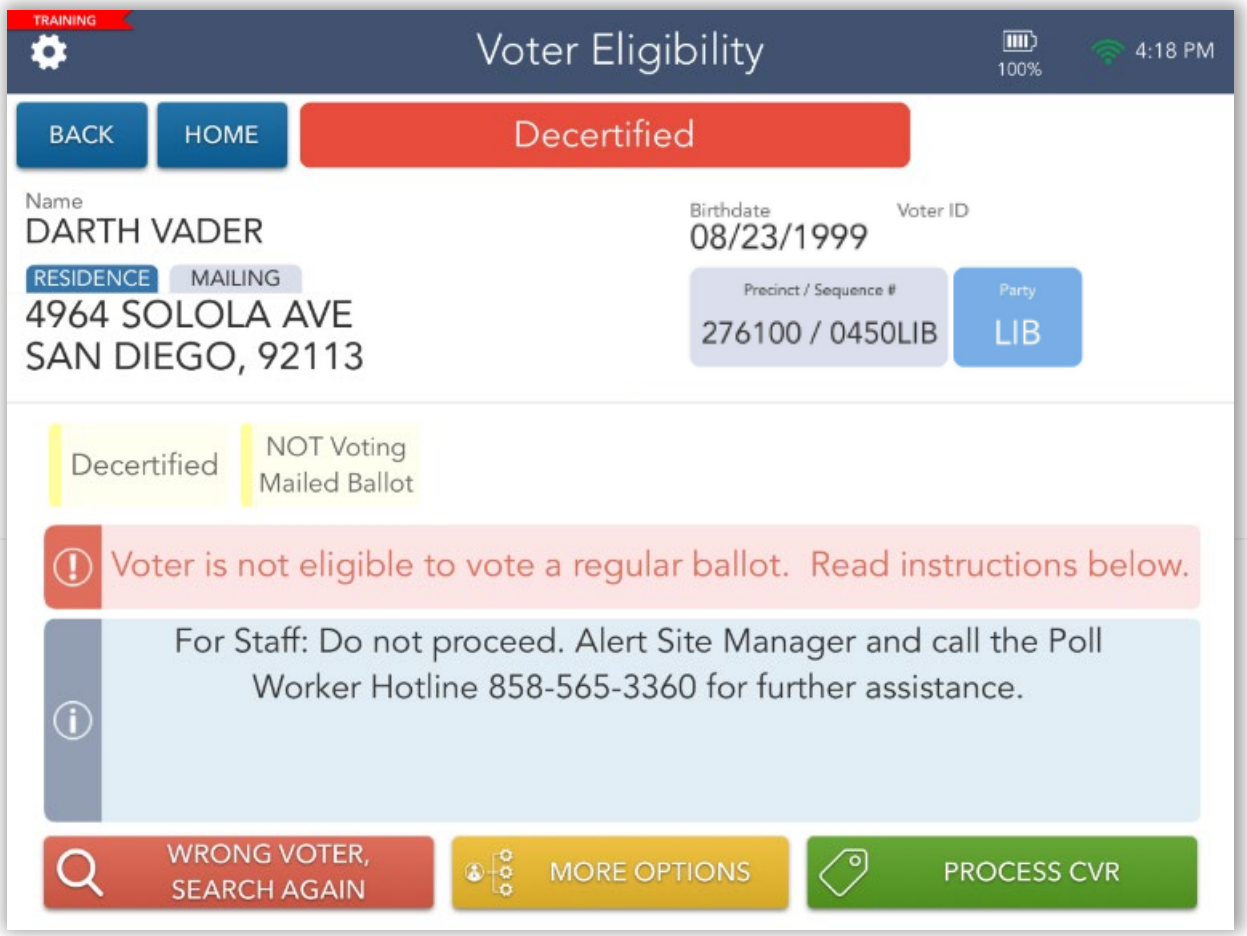
10	The **Voter Signature** screen will appear. Complete the sequence number verification step with the voter prior to asking for their signature. Verify with voter that the Sequence Number from the EPB matches their voting materials. Verify the voter's Check-In Form is signed. Tilt the ePollbook screen toward the voter and have them sign. Once they have signed, they will need to select the **DONE** button.	
11	Tilt the screen back toward you and select the **ISSUE BALLOT** button to continue.	
12	The voter's **Sequence #** will appear on the screen. Review the procedures for the selected ballot type in the blue box then select **COMPLETE CHECK-IN.**	
13	Congratulations! The voter has been successfully checked in. Complete all applicable instructions in the blue box then select the **PROCESS NEXT VOTER** button and move on to the next voter.	

Decertified

Decertified voters are voters who were registered to vote at some point but are no longer eligible to vote.

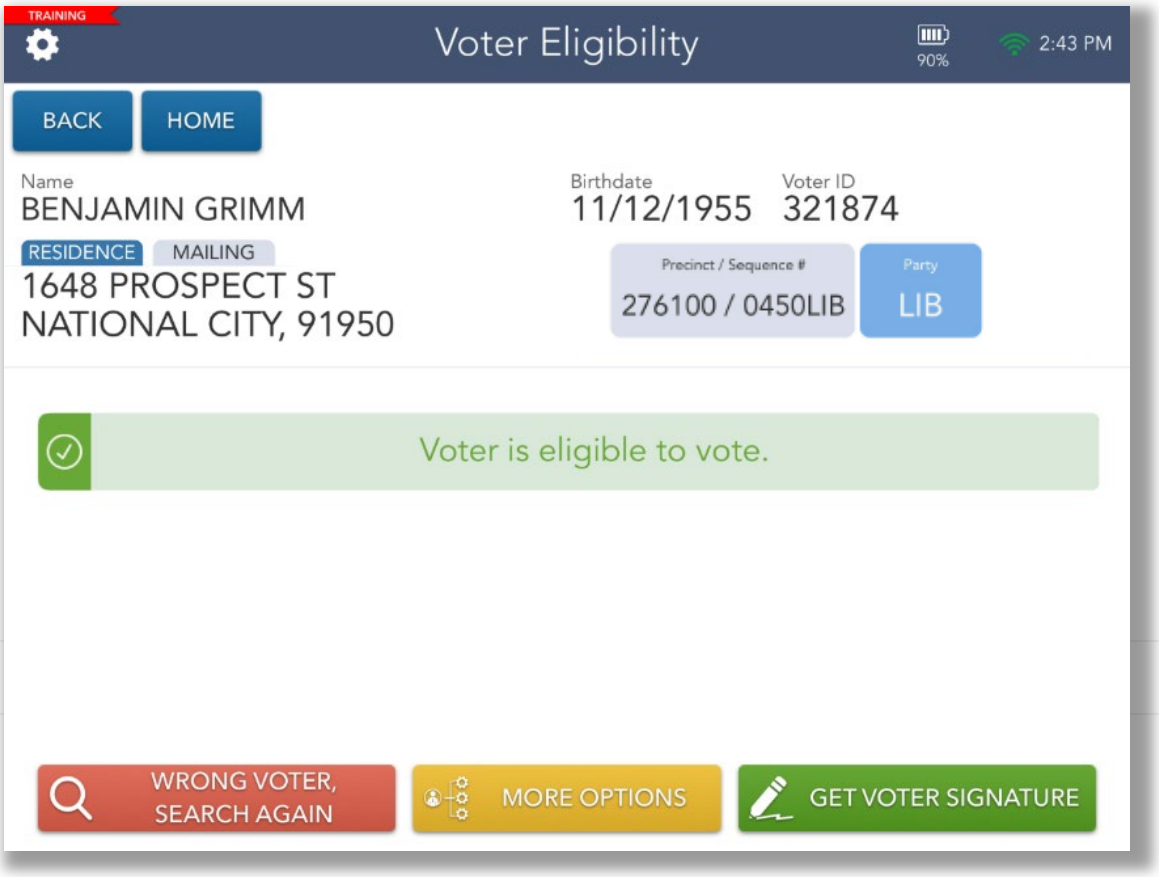
DO NOT process these voters! Instead, notify the **Site Manager** who will call the Poll Worker Hotline for instructions on how to assist this voter.

The Site Manager will call the hotline to receive instructions on how to assist this voter.



Eligible/Inactive Voter

This voter did not receive a mail ballot. Either they have not voted recently and were not mailed a ballot or their ballot was undeliverable. Regardless, this **Voter is eligible to vote** at the vote center.

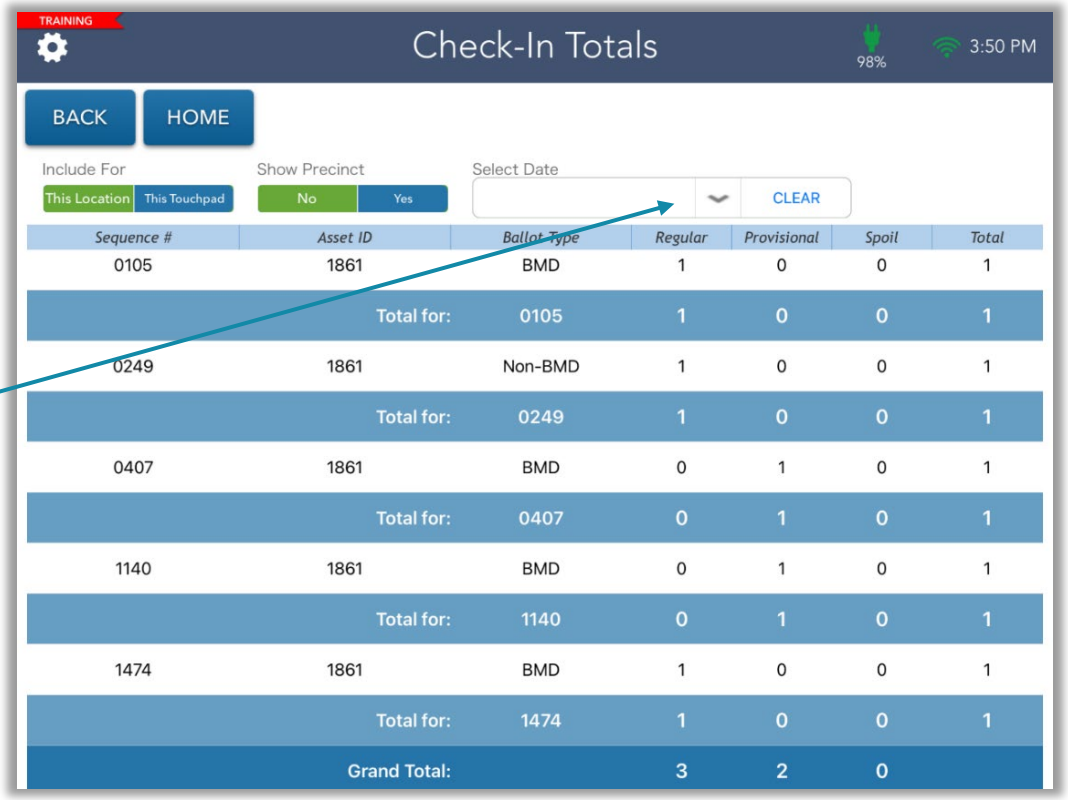


The EPB does not provide instructions in the blue message box for this voter. Follow the procedures to assist a **VBM Ballot Issued Voter** on pages 9-11.

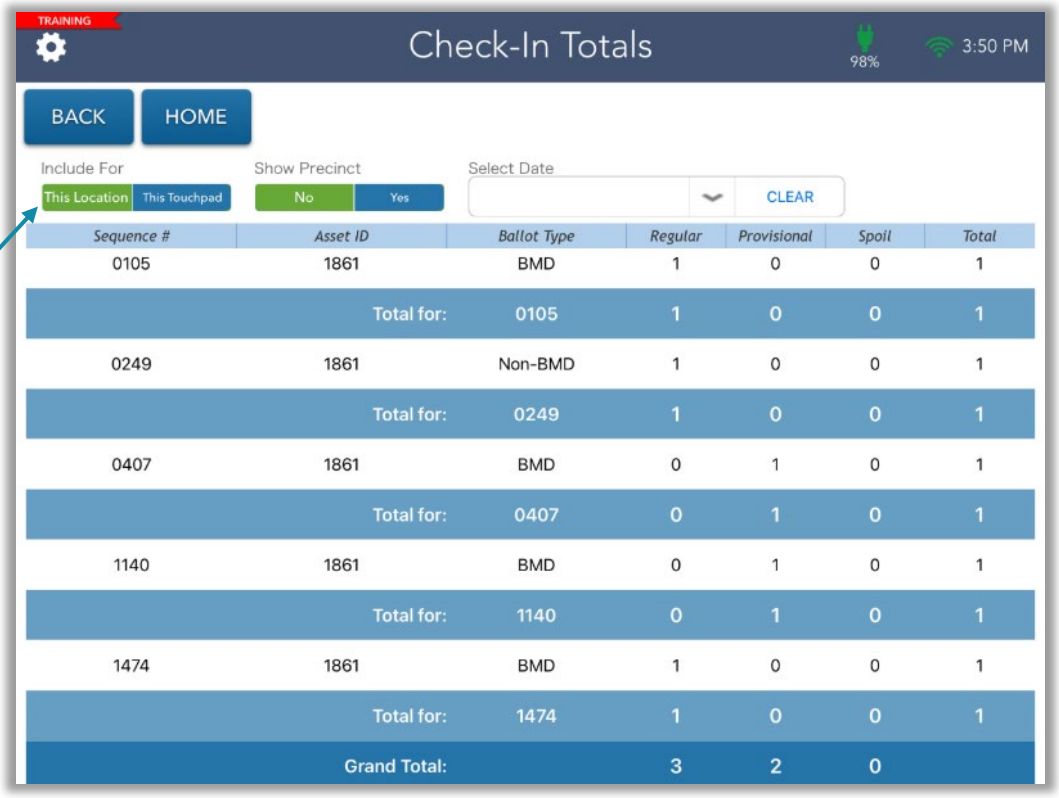
Check-In Totals

From the **Launchpad** screen, select the **CHECK-IN TOTALS** link from the **Launchpad Menu** to view this screen. Here, you will be able to see a running total of all ballots issued. These ballot totals will be used to complete the Daily Ballot Statement every night at closing.

Use the dropdown arrow to select the desired date.

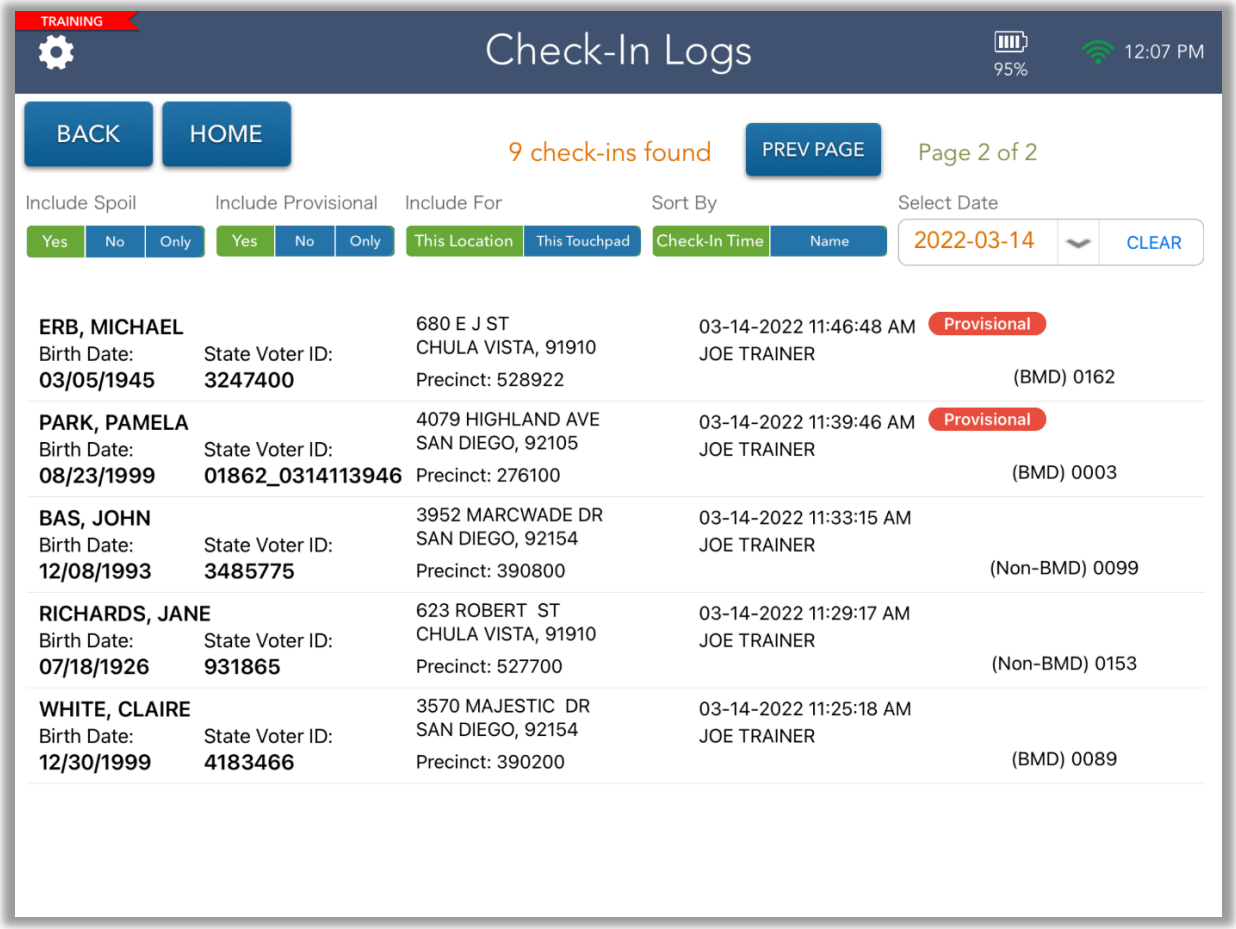


To change from '**This Location'** to '**This Touchpad' (EPB)**, select the appropriate button under the '**Include For'** section.



Check-In Logs

From the **Launchpad** screen, select the **CHECK-IN LOGS** link from the **Launchpad Menu** to view this screen. Throughout the days the vote centers are open, a log is kept of all voters who have checked in on a particular ePollbook and at the location.



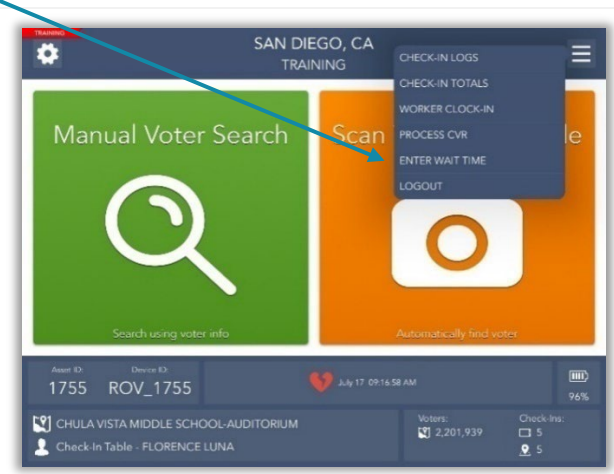
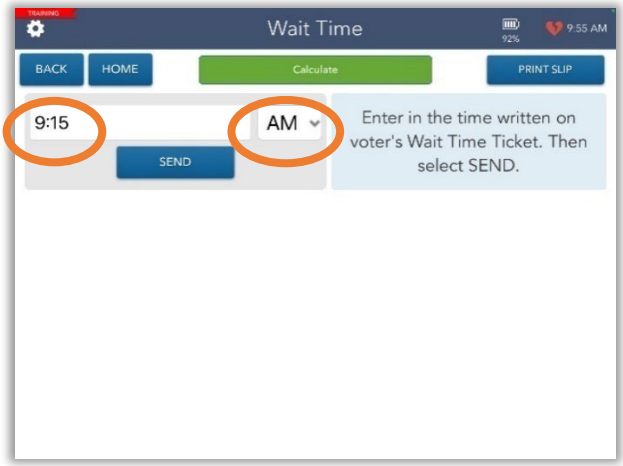
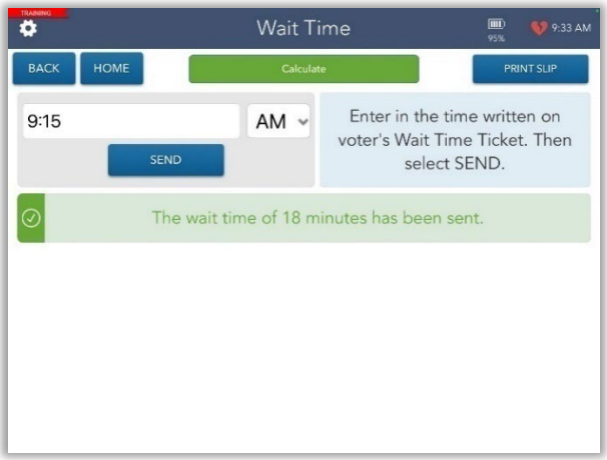
These logs allow you to account for all voters checked in as well as provisional ballots. To change from "**This Location**" to "**This Touchpad**", select the appropriate button in the "**Include For**" section.

Select a voter to view an image of their signature.

Wait Time Ticket

The Wait Time Ticket Process is designed to provide voting wait times at vote centers on Election Day for voter's convenience.

From the **Launchpad** screen, select the **ENTER WAIT TIME** link from the **Launchpad Menu** to view this screen.

1	From the **Launchpad** screen, select the **ENTER WAIT TIME** from the **Launchpad Menu** to view this screen.	
2	Enter the time written on the Wait Time Ticket into the EPB before checking in the voter. Enter the hour and minutes. No colon is needed. Select AM / PM	
3	When you press **SEND,** the amount of time the voter waited to be checked in will be calculated and sent to the ROV.	

Logout Temporarily

1 During lunches and breaks, you will need to logout temporarily. From the **Launchpad** screen, open the **Launchpad Menu** and select **LOGOUT**.

2 A pop-up will appear. Select the green **LOGOUT TEMPORARILY** button.

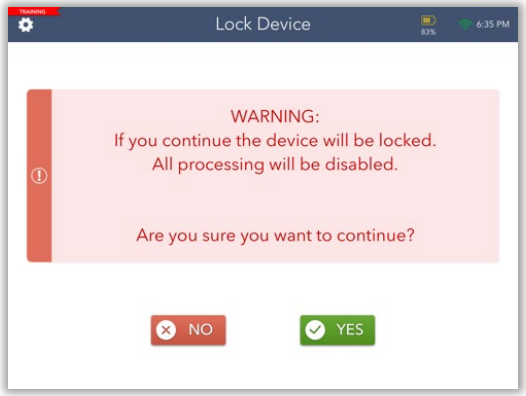
3 The ePollbook will return to the SDVOTE screen, and the poll worker covering your break will need to log in using their name.

Closing for the Day

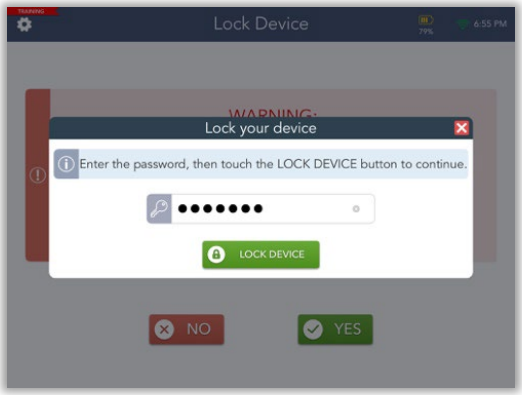
1 At the end of each voting day, you will need to lock the ePollbooks. From the **Launchpad** screen, open the **Launchpad Menu** and select **LOGOUT**.

2 A pop-up will appear. Select the yellow **CLOSE FOR THE DAY** button to begin the closing process.

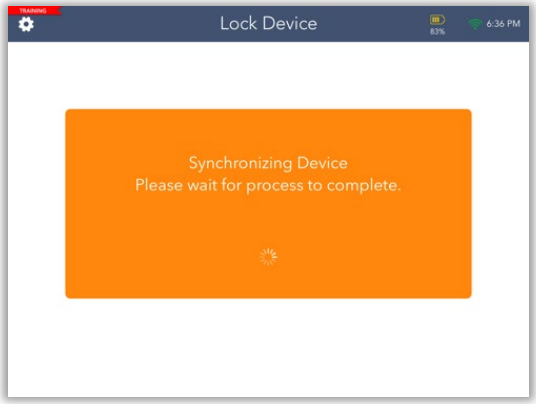
3 A warning screen will appear. If you are ready to close for the day, select **YES.**



4 Enter the password you've been given to lock the device then select the **LOCK DEVICE** button.

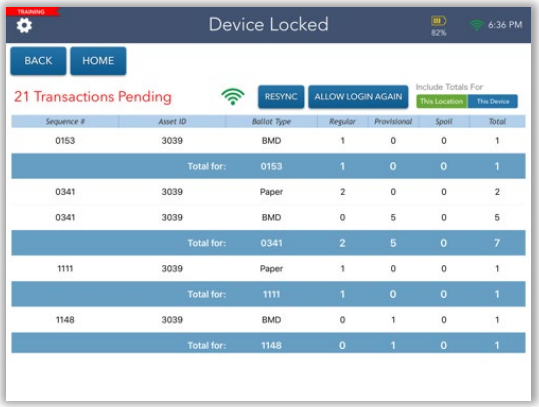


5 An orange screen will appear with a "Synchronizing Device" message. Wait for the message to disappear.



6 Congratulations, you have closed out for the day!

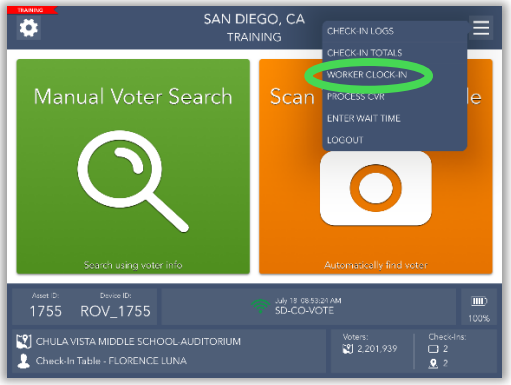
If your Device has not sent all of its transactions, **PENDING** will appear in the left-hand corner. Do not power down until device is completely synced and is ready to be turned off. Select OK, then power off.



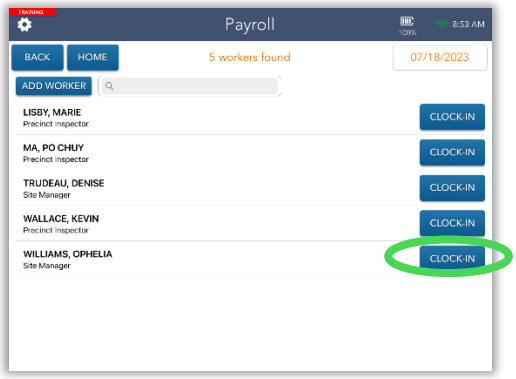
Poll Worker Clock In – Time Keeping

CLOCK IN / OUT PROCEDURE

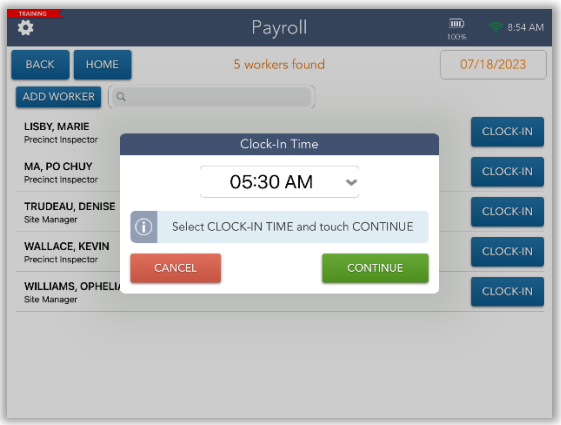
1 Record the start and end of you shift each day you work in the ePollbook.
From the **Launchpad** screen, open the **Launchpad Menu** and select **WORKER CLOCK-IN**.



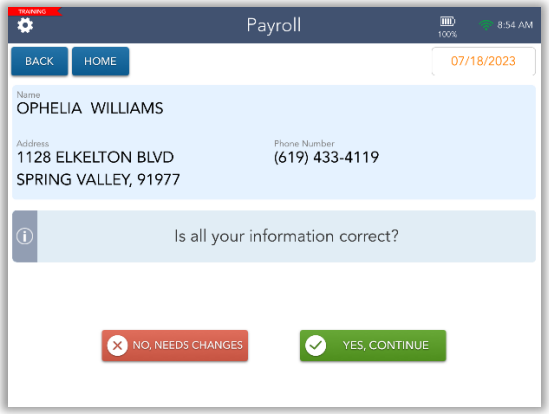
2 Click on the blue **CLOCK-IN** button next to your name.



3 A pop-up screen will appear. Select your shift start using the drop-down arrow. Press **CONTINUE**.

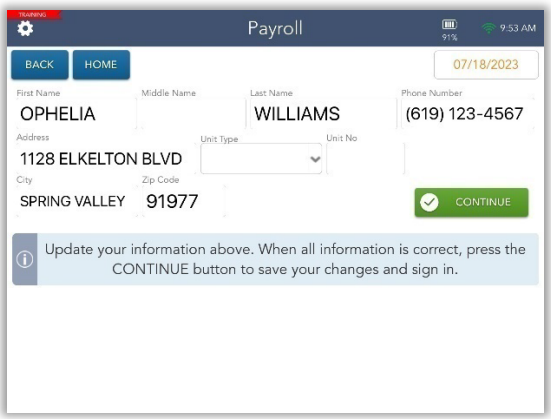


4 Review and verify your name, address and phone number are correct on the screen. Click on **YES, CONTINUE** once verified.



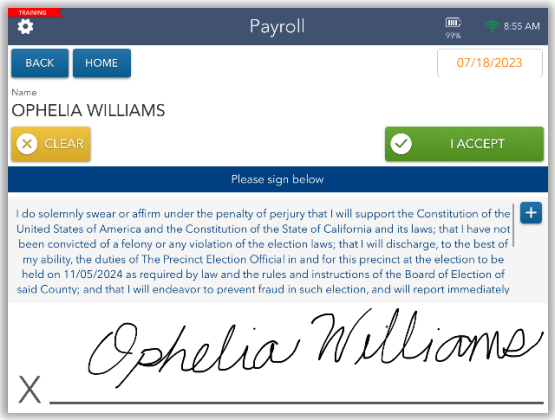
If your information is incorrect, press **NO, NEEDS CHANGES** to complete edits as needed.

5 Update you information. When all information is correct, press the **CONTINUE** button to save your changes.



A message the green box will confirm the clock-in was successful.

6 Read the Poll Worker affirmation, sign and click on I ACCEPT.

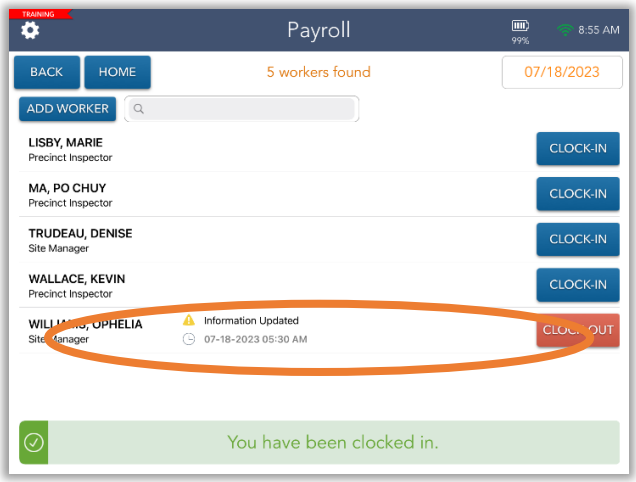


CLOCK OUT PROCEDURE

7

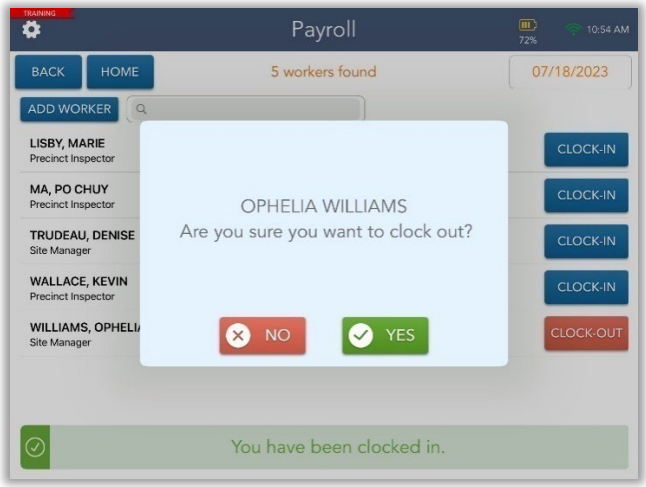
The green message box states:

You have been clocked in.



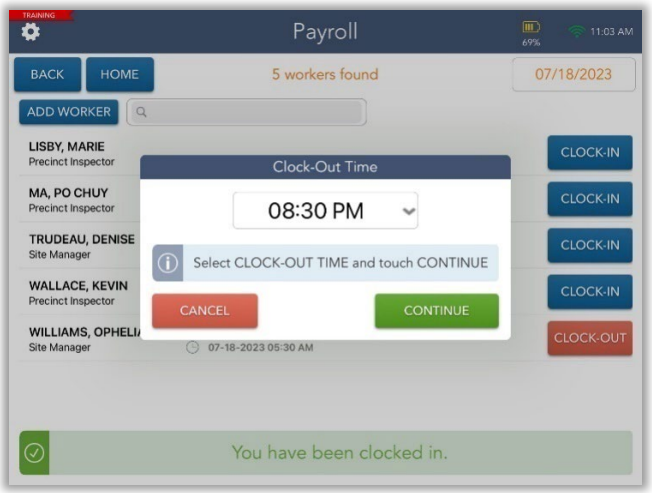
1

Click on the red **CLOCK OUT** button. A pop up confirming your name will ask you if you are sure you want to clock out. Click on YES.



2

A pop-up screen will appear. Select your shift end time using the drop-down arrow. Press **CONTINUE**.

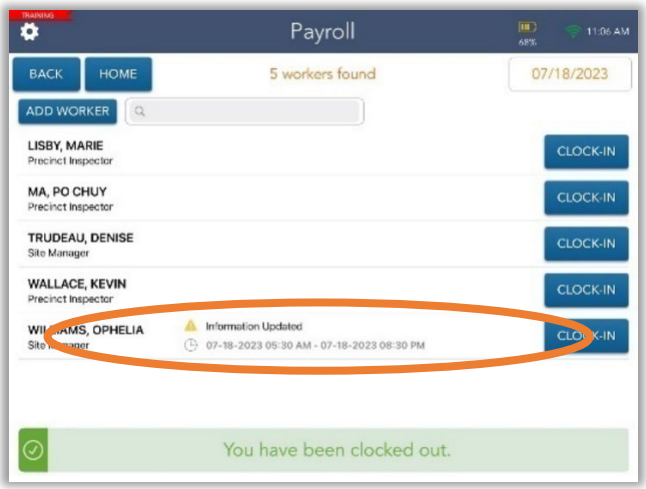


3

A message the green box will confirm the clock-in was successful.

The green message box states:

You have been clocked out.

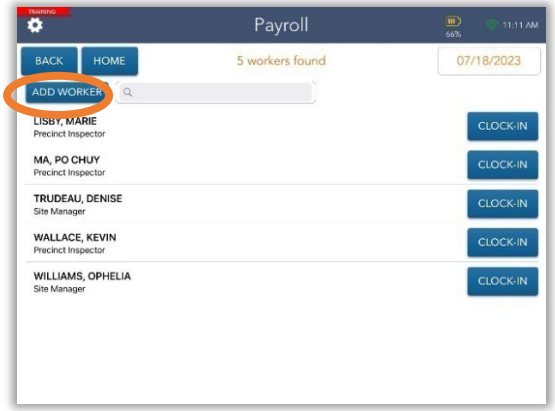


ADD POLL WORKER

1

If your does not appear on the Payroll screen. Alert your Site Manager for direction.

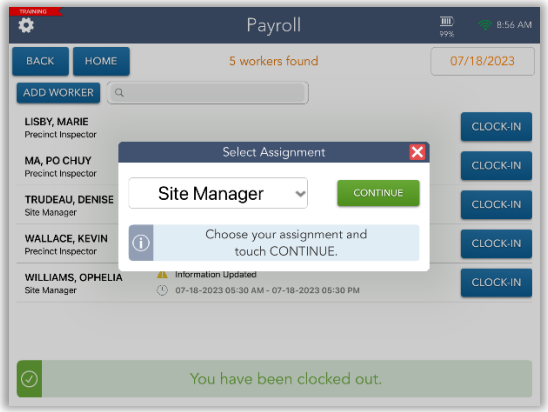
To add a Poll Worker click on the blue ADD WORKER button.



2

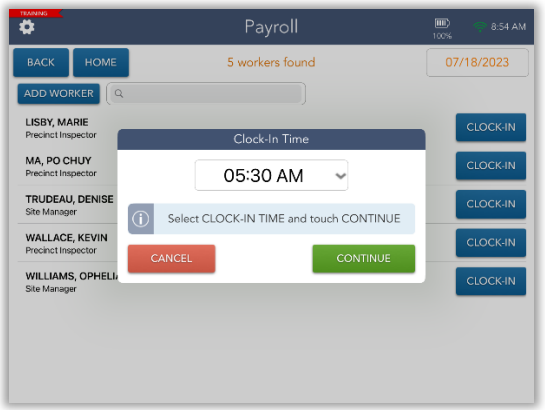
Scroll through the complete list of Poll Workers by clicking on the blue **NEXT PAGE** button. If you are not listed, press the red **I AM NOT ON THE LIST** button.

Select your Poll Worker assignment (position) in the drop-down menu and touch the green **CONTINUE BUTTON**.



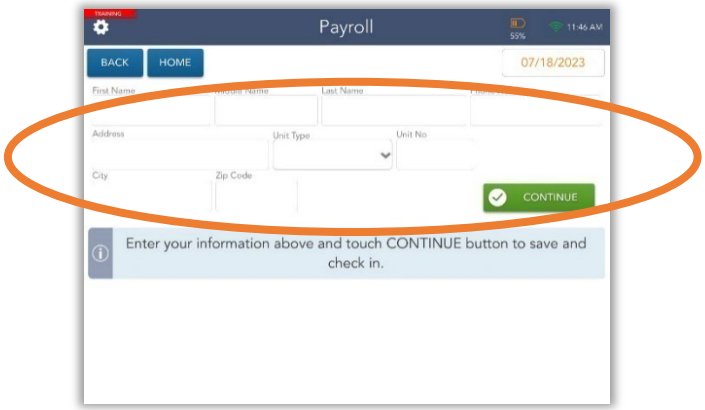
3

A pop-up screen will appear. Select your shift start using the drop-down arrow. Press **CONTINUE**.



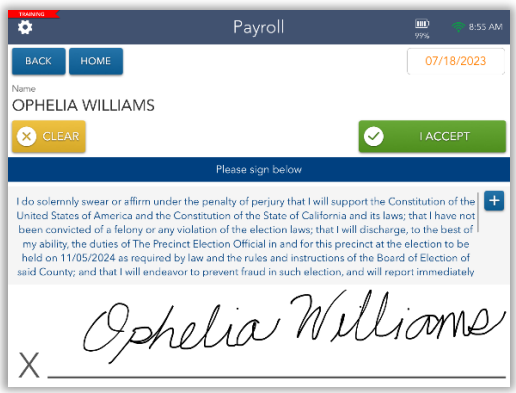
4

Enter all information in the fields provided. Click on the green **CONTINUE** button to save your information and check-in.



5

Read the Poll Worker, affirmation, sign and click on I ACCEPT.

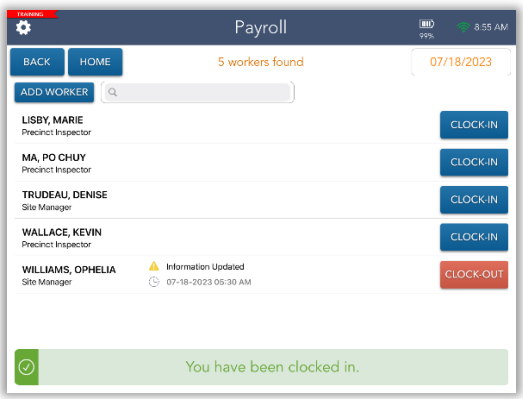


6

A message the green box will confirm the clock-in was successful.

The green message box states:

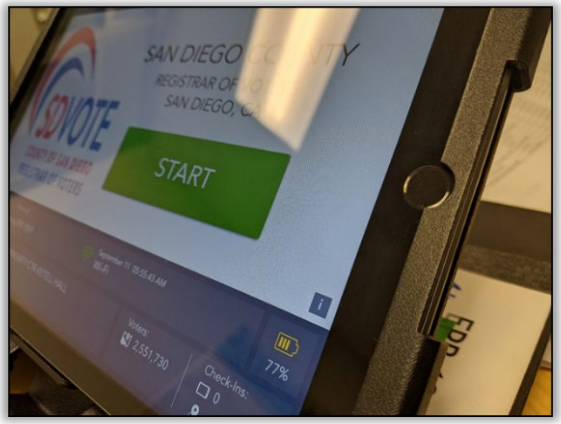
You have been clocked in.



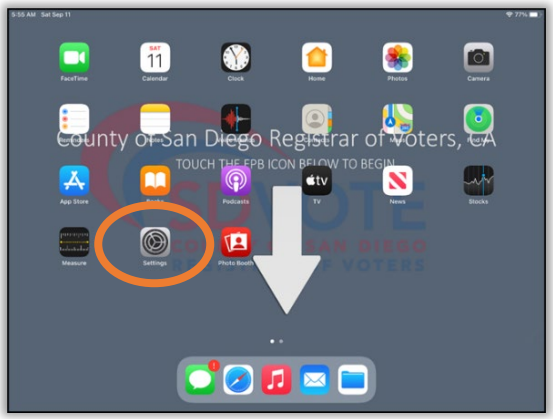
Troubleshooting

Manually Connecting EPB to Cradlepoint

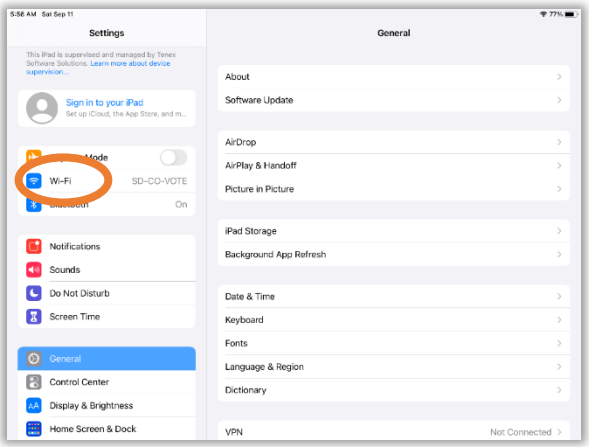
1 Touch the Home Button.



2 Touch SETTINGS (vote center EPBs will not have any other icons on their home screen except for the SETTINGS icon).

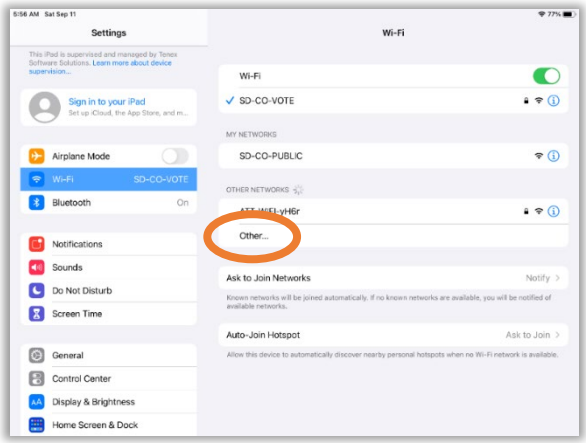


3 Touch **WI-FI.**



4 The Cradlepoint network name is **SD-CO-VOTE. If the EPB is connected to the Cradlepoint, SD-CO-VOTE will have a checkmark next to it**. If not, manually connect device to Cradlepoint.

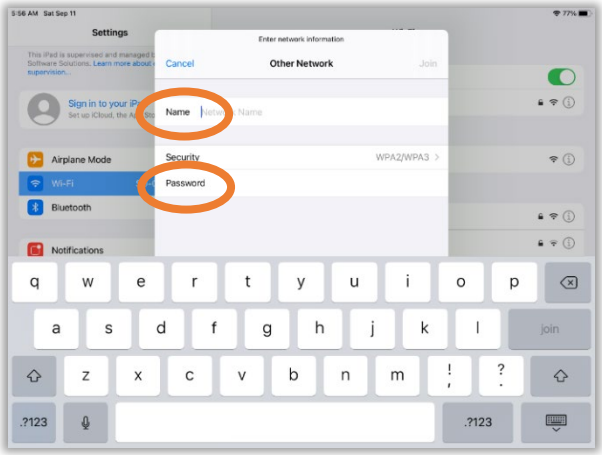
- If **SD-CO-VOTE** is listed, select it. Type in password, if prompted (see Step 5)
- If **SD-CO-VOTE** is **not** listed as one of the options, select **Other**



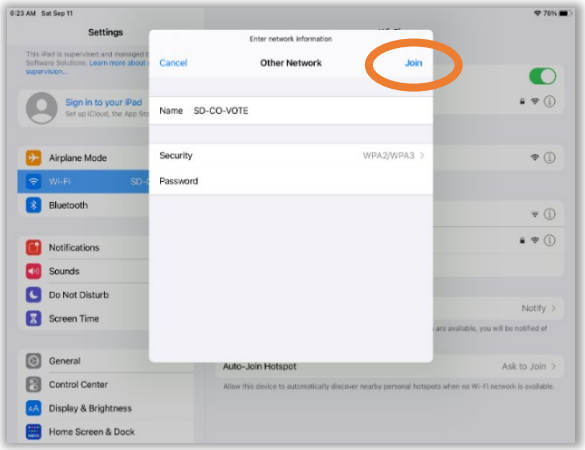
5 Once **Other** is selected, a pop-up window will appear, asking you to enter network information:

- **Name: SD-CO-VOTE**
- **Security: leave as is**
- **Password: (Call Poll Worker Hotline)**

(To type the !, hold down the upward arrow and touch !)
(To type the @, touch the 123 and the @ option appears)



6 Once all fields are completed, touch **Join.**



FAQs

❖ **The EPB is not connected to the Cradlepoint and shows a broken red heart. What should I do?**

- Touch the broken red heart a few times to attempt to reset the connection
- Ensure Cradlepoint is functioning properly
- If Cradlepoint is functioning and broken red heart is still displayed, connect EPB manually using the steps above

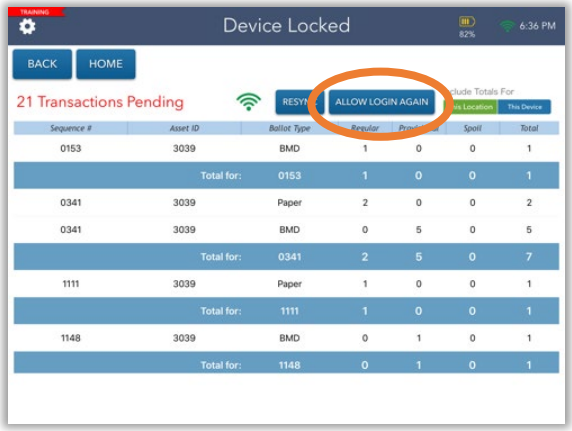
Note: The EPBs will be monitored at all times.

❖ **The EPB is plugged in but is not charging. What should I do?**

- Ensure all sections of the EPB charger are securely attached
- Plug it in to a different wall outlet
- Use a different EPB charger

❖ **I need to log in to the EPB but the screen shows "Device Locked." What should I do?**

- Touch the blue **ALLOW LOGIN AGAIN** button close to the top of the screen
- Follow instructions on pg. 4 to log in



Notes Page

SDVOTE
COUNTY OF SAN DIEGO
REGISTRAR OF VOTERS