

Polling Place Management: A New Way of Thinking

When managing an election it is recommended that you first go to the elections checklist that will walk you through each step of the process and track the steps that you have taken. This checklist is accessed by going to [Elections > Election Checklist](#).

With the addition of polling places, the way in which you manage and think about elections has changed dramatically. The contents of this document explain in detail the changes that have been made and what you need to do to make this feature work for you.

Creating an Election

Before an election plan is created, an election must first be created. If you are viewing the election checklist, this is the second step in the Election Processes section. The first step on the checklist requires you to run the pre-election utility that removes the marks from those that received an absentee ballot in the last election. If this isn't run, those individuals will not get a second ballot if one was requested. In addition, make sure to review the Annual Processes section at the beginning of year. Running the annual processes are critical to maintaining a clean and updated database. Annual processes are run once a year and election processes are run before every election.

To create an election, go to: Elections > Election Maintenance to create an election.

Once here, you will do the following:

- Give the election a name
- Select the date for the election
- Choose a cutoff date for those wanting to register to vote early for this election.

As it relates to early voting, if the election is on June 26th and you select June 11th as the last date to early register, anyone registering after June 11th will not be eligible for early voting. To modify election content or delete an election, open the election by double clicking on it and make the desired changes.

Creating a Master Election Plan

Here is where the shift in thinking occurs. Precincts are now organized by Polling Place. Go to [Precincting > Polling Places > Election Plan](#) (located in the upper left-hand corner of the form)

This takes you to the master plan form. Each of the three columns/dropdown boxes at the top of the form represents an election. All that is required to proceed is to select at least one election in the first column. As you can see, you can create a master election plan for up to three elections. Once you have selected your election, select the save button return to the previous screen. However, if you are interested in setting up a template that will generate a list of poll workers and DREs needed at each polling place, stay on this form.

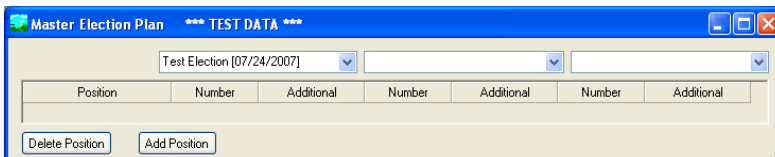


Image 1. (Master Election Plan)

Although you only need to select an election to continue the process of creating an election plan, there are two other benefits that this feature provides. These two areas assist in establishing the number of poll workers and DREs at each polling place. While it isn't mandatory, it can be helpful.

Poll Worker Positions

Outside of selecting an election, this feature provides two additional benefits. The choice as to use it or not is entirely up to you. The first area assists in determining how many poll workers by their poll position will be required based on the information that you have entered. After inserting the default or baseline information, the template generates a listing of how many poll workers will be required for each polling location based on the number of voters that are associated with a polling place.

Example: Let's say that you have a municipal election on July 24th. Select the election from the first drop down box at the top of the form. You will then add your various poll worker positions. Before you enter any information, please keep in mind that you are creating a master plan for the entire election, not just a specific polling place.

In the example below (see Image 2.), I am going to add a poll manager and poll book clerk to my polling places. Simply select the add position button and choose the position title that you want using the position drop down box. As you can see, I have stated that I want one poll manager and at least one poll book clerks for each polling place. You might be thinking that I have not selected enough poll book workers, but that problem will take care of itself once I generate my template. These numbers are the default or baseline information.

Position	Number	Additional	Number	Additional	Number	Additional
Poll Manager	1					
Poll Book Clerk	1	750				

Buttons: Delete Position, Add Position

Spread to Polling Places:

Initial DREs: 0, Up to Voters: 0, DRE for each additional Voters: 0

Buttons: Cancel, Save

Image 2. (Poll Positions)

Once the report has been created, you can change the number of polling officials desired in the polling place details screen.

Heads-up!

This template will only generate the number of positions required based on your input and not assign individual poll workers to them.

Now you will need to fill in the additional field that is next to the number field. In this example, I have selected 750 in the additional field of the poll book clerks. This means that for each ADDITIONAL 750 registrants that are assigned to this polling place, 1 poll book clerk will be added automatically. When it comes to poll managers, I thought that one would be enough. However, I could have inserted the number 2,000 into this field as well. This would give me one ADDITIONAL poll manager for every 2,000 voters assigned to this polling place.

In short, we have requested 1 poll manager and 1 poll book clerk at every polling location AT A MINIMUM. We have also requested 1 additional poll book clerk for every 750 voters that are assigned to this polling place. The more people that are assigned to this polling place, the more poll book clerks will be assigned to it.

Another Option: Since you are simply adding a minimum of positions that you would like at each polling place, you could also say that you want 1 poll manager and 3 poll book clerks at each polling place, regardless of how many voters are assigned to it. You could then add an additional number to the fields as well. At the very least, you would know that you have a poll manager and three poll book clerks per polling place.

Vacancy Reporting: In addition to generating a template that will help you staff your polling places, this option can provide a vacancy report for each of your polling places. If you do not create position listing, you won't be able to run this report. This report looks at who you have assigned in the poll worker screen and compares it to the numbers generated by this template.

DREs (Voting Machines)

Your next step is to fill out the information for DREs if you are using them in your election. In the example below, you can see that I have requested 3 initial DREs for my polling place. I have also requested 1 additional DRE for every additional 1,000 registrants that are assigned to this polling place.

The screenshot shows the 'Master Election Plan' window with 'TEST DATA' selected. The main table lists positions and their associated DRE counts:

Position	Number	Additional	Number	Additional	Number	Additional
Poll Book Clerk	2	1,000				
Poll Manager	7	2,000				

Below the table, there are buttons for 'Delete Position' and 'Add Position'. A summary table shows DRE requirements:

Initial DREs	3		0
Up to Voters	1000		0
DRE for each additional Voters	1		0

At the bottom, there are checkboxes for 'Spread to Polling Places' (checked), and 'Cancel' and 'Save' buttons.

Image 3. (DREs and Generating the Template)

Generating the Template

To generate the template, select the check box under the election(s) that you want. If you want this template to be applied to two elections, you will select both check boxes under the corresponding elections and select the spread to polling places. Finally, select the cancel button. You will be taken back to the polling place address screen.

Polling Place Management (Polling Place Addresses)

Now that you have created your master plan, it is time to make sure that you have updated your polling places. You will also notice that the elections you created a plan for are now viewable. In this case, we can see the election to be held on July 24th, 2007. If you want to add a new polling place, simply select the add button and insert the associated details.

The screenshot shows the 'Polling Place Addresses' window with 'TEST DATA' selected. It features a list of polling places on the left and a table of precincts on the right.

Left Panel: Polling Places List

- Active Re-Entry
- Carbon Country Club
- Carbon School District
- Castle Heights Elementary
- Castle Valley Center
- Community Center
- Community Center-Fairgrounds
- County Courthouse
- Price City Hall

Right Panel: Set Election Polling Place

Saved Plans: [Dropdown]
Delete Plan [Button]
Save Plan [Button]
Restore Plan [Button] | 07/24/2007 [Dropdown]
Normal Polling Place [Button]

Table: Precincts

Precinct	Normal Polling Place	07/24/2007
15	Wellington City Hall	
16	Price City Pub Works (Domes	
17	County Courthouse	
18	Price City Pub Works (Domes	
19	Wellington City Hall	
2	Scofield Town Hall	
20	Senior Citizens Center	
21	Sally Mauro Elementary Scho	
22	Wellington City Hall	
25	Senior Citizens Center	
26	Senior Citizens Center	
27	Community Center-Fairgrounc	

Buttons: Add, Cancel

Image 4. (Poll Address)

If you have created a new polling place plan for an election, it can be reset to its original polling place at anytime by selecting the normal polling place button.

Changing the Polling Place

You will notice that the normal polling place is applied to each of the precincts. The normal polling place is the default. If you want to change the polling place of any precinct, simply drag a polling place from the polling place option list at top to the form to the polling place of the precinct and election that you are working on. The election is denoted by the date and not the name. If I had created two elections both would be visible.

To delete a polling place, right click on it. To make the polling place the same in all elections for any precinct, hold down the shift key and drag it to the normal polling place field of the precinct that you want below. If you want to maintain your normal polling places for a particular election, make sure that the election that you want is selected in the drop down box and select the normal polling place button.

Example: In the election to be held on July 24th (see Image 5.), I will be using four polling places. If this election plan is one that I plan on using in the future I have the option to save it.

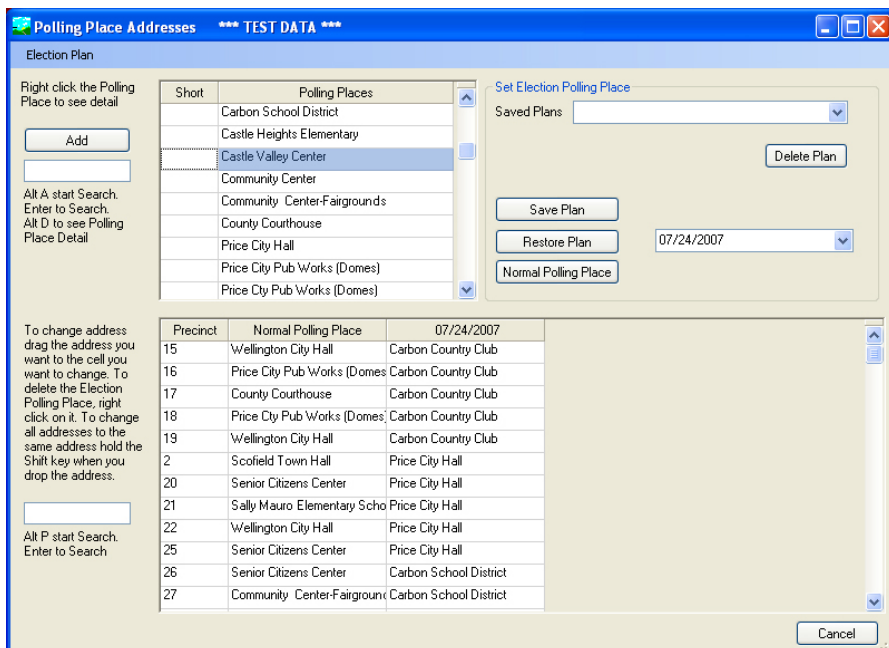


Image 5:

Heads-up!

If I had created a second or third election plan, it would be visible on this screen. In addition, you can view details of each polling place by right-clicking on one.

Saving Your Election Place Plan

After you have made your changes, select the save plan button and give it a name. All of your saved plans appear in the save plans drop down box. This plan sets the election polling place. If for whatever reason you want to change your polling places back to their normal location, select the normal polling place button. If you are working with a second election and you want to assign a saved polling place plan to it, make sure that the correct election and polling place plan is selected (using the drop down boxes) and click the restore button.

Reminder: Keep in mind that if you applied this plan to two separate elections that two elections will be showing in the table. However, to make changes to a particular election, you first have to choose which election you want to work with using the election dropdown box before changes can be made. If you only have one election, that election will appear and you do not have to give it a second thought.

Viewing Polling Place Details

The list of polling places appears at the top of the screen. To view detailed information about any polling place, right-click on a polling place. Information regarding contacts, delivery, notes, election workers, election worker positions, issues, ADA, polling place layout, DREs, support staff, and payment can be found here. Based on the example that we used when creating our poll position template, we can see that the Carbon County Club polling place will need 1 poll manager and 4 poll book clerks.

Polling Place Detail * TEST DATA *****

Name: Carbon Country Club Poll Phone: Fax:

Short Nm: Zone: Care Of:

Address: 3055 N. Highway 6 Mailing Address:

City: Zip: City: Zip:

Precincts: 07/24/2007
 17
 18
 19

Contacts | Delivery | Notes | Election Workers | **Worker Positions** | Issues | ADA | Layout | Voting Machines | Support Staff | Payment

Test Election [07/24/2007]

Position	Need	Filled
Poll Book Clerk	4	0
Poll Manager	1	0

Add Delete Refresh

Delete Map Print Cancel Save

**Polling Place Details:
Worker Positions**

By viewing polling place details, you can see how many poll workers by position are needed.

Polling Place Detail * TEST DATA *****

Name: Carbon Country Club Poll Phone: Fax:

Short Nm: Zone: Care Of:

Address: 3055 N. Highway 6 Mailing Address:

City: Zip: City: Zip:

Precincts: 07/24/2007
 17
 18
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Contacts | Delivery | Notes | Election Workers | **Worker Positions** | Issues | ADA | Layout | Voting Machines | Support Staff | Payment

Election: Test Election (07/24/2007)

Name	Address	City	Phone	Position
Adamson, Anne Sarah	1725 Haycock Ln	Helper	(435)472-1234	Poll Book Clerk

Delete Map Print Cancel Save

**Polling Place Detail:
One Stop Shopping**

By viewing polling place details, you can see what poll workers you have assigned to a particular polling place. In addition, you can view the information regarding the following:

- > Additional support staff
- > Poll worker payments
- > Voting machines (DREs)
- > Issues
- > Contact information
- > The physical layout
- > ADA issues
- > Delivery