

Poll Worker Selection and Management

The process of selecting and managing poll workers can be a time consuming and tedious process. Thankfully, VISTA has redesigned its process to ensure that it is user-friendly and allows flexibility when managing poll workers in current and future elections.

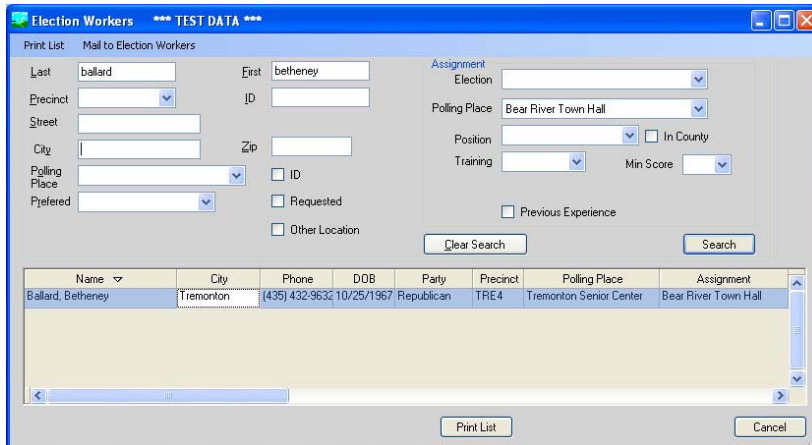
To increase your understanding of the process, this document has been designed to take you from the first step of conducting a search to the final step of issuing payment. As a result, starting from the top and working your way through each step is highly recommended.

The Selection Process: The Search for Poll Workers

To begin the process, go to: [Elections > Election Workers](#)

To search the database for potential and/or previous poll workers, you can use any of the search fields on the screen.

For instance, if you want to search for voters who have worked as a poll manager or ballot clerk, simply select that position from the position drop down box and select search. If you wanted to pull from a list of voters by precinct, you would select a precinct from the precinct drop down box. As you can see, the search criteria used can be as broad or narrow as you would like.



The screenshot shows the 'Election Workers' search interface. The search criteria are as follows:

- Last: ballard
- First: betheny
- Assignment: Election
- Polling Place: Bear River Town Hall
- Position: (empty)
- Training: (empty)
- Min Score: (empty)
- Other Location:
- Previous Experience:

The results table is as follows:

Name	City	Phone	DOB	Party	Precinct	Polling Place	Assignment
Ballard, Betheny	Tremonton	(435) 432-9632	10/25/1967	Republican	TRE4	Tremonton Senior Center	Bear River Town Hall

Heads-up: If you want to print a listing of your search, select the print list button. You can also save some time by selecting the previous experience check box when looking for possible poll workers.

Assigning Poll Worker Responsibilities

To assign a voter poll worker responsibilities double-click on their name. You will then be taken to the election worker details screen. In the middle of the screen you will notice five tabs, with the assignment tab being the default. This will allow you to view their poll worker history. When you select a record the corresponding information will appear below in the assignment details section.

To assign this person to a new election, select the new button at the bottom of the page. Select the appropriate election and assigned position and polling place using the dropdown boxes and select save. You now have a record for the upcoming election.

The screenshot shows the 'Election Worker' software interface. At the top, it displays the worker's name 'Bethaney Ballard', address '378 N 100 W Tremonton 84337', phone '(435) 432-9632', and email 'bballard@whatever.com'. It also shows a 'Warning' icon and a 'Preferred Position' dropdown set to 'Available'. The 'Notes' section contains two entries: '10/04/2007 - Aaron McElwee She will be out of town and will not be able to make it.' and '10/04/2007 - Aaron McElwee This person came highly recommended.' Below this is a table of assignments:

Election	Polling Place	Position	County	Score
10/12/2007 - Test	Bear River Town Hall	Ballot Clerk	Box Elder	9
11/07/2006 - General Election	Tremonton Senior Center	Information Clerk	Box Elder	0
06/27/2006 - Primary Election	USU Innovation Center	Information Clerk	Box Elder	0
11/02/2004 - General Election		Information Clerk	Box Elder	0

Below the table is the 'Assigned Details' section, which includes dropdowns for 'Election' (Test - 10-12-2007), 'Position' (Ballot Clerk), and 'Polling Place' (Bear River Town Hall). It also has a 'Recruitment Source' dropdown, a 'Reason' dropdown, and a 'Go To Polling Place' button. To the right is an expense summary table:

	Amount
Election	200.00
Training	50.00
Travel	25.00
Misc	0.00
Total	275.00

At the bottom, there are buttons for 'Delete', 'New', and 'Save', along with a 'Print' button and a 'Cancel' button.

Keeping Notes: To insert notes about a poll worker, select the date button. The person's name entering the comments will appear. After inserting your comments, select the save button, located under the voter button. Repeat this process as often as you would like.

Position Preference: If a poll worker has a preferred position, you can document that by using the preferred position dropdown box.

Open to Working Multiple Polling Places: If they are open to working at multiple polling places, select the will work other location check box.

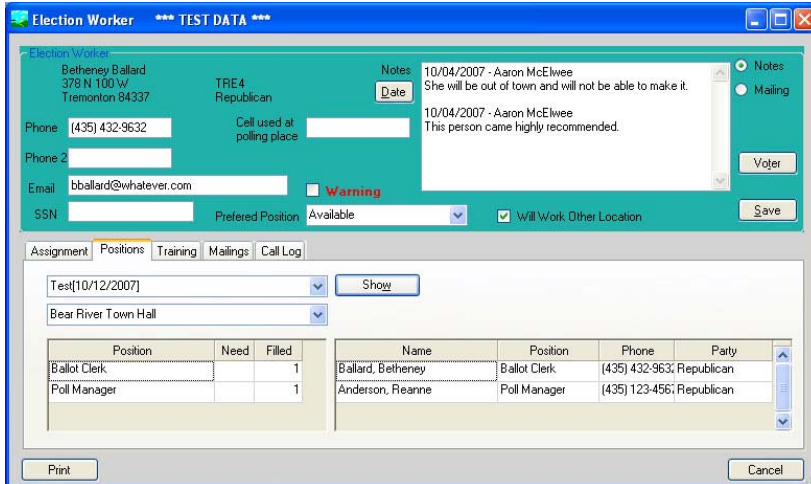
Tracking Expenses: With the appropriate election record selected, you can add and edit the expenses associated with their poll worker service. Simply insert their pay into the corresponding fields. To print out a pay request, labels or officials list, go to the reports section of VISTA and select the officials tab.

Keep in mind that you can also print off a list of officials by selecting the print list button on the main election workers screen after you have conducted your search.

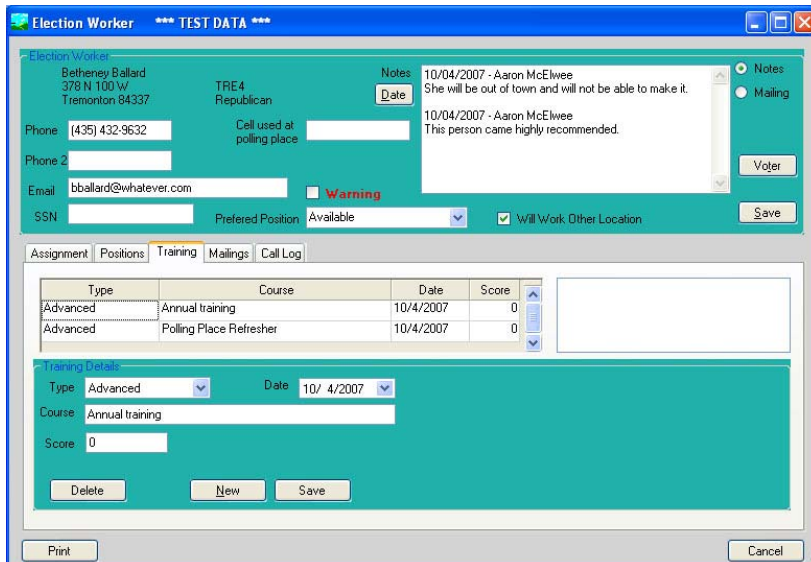
The Five Tabs: In the middle of the page you will have noticed five separate tabs that give you greater control over the management of poll workers. As mentioned earlier, the assignment tab provides you a history of their service as a poll worker.

Position: To view poll workers at a polling place, you have two options. Since we are discussing tabs, let's start with the position tab. Simply select the position tab, choose the election, the polling place, and the show button. See image below.

The second option is accessed from the assignment details/default screen. Select the go to polling place button.



Training: To track a poll workers training, select the new button and insert the type of training, the course name, date, and score if applicable. Repeat the process as needed. To delete a record, select it and select the delete button at the bottom of the page.



Mailings: Select the mailings tab to track what has been sent to each poll worker. To add a mailing record select the appropriate election and then the add mailing label. To delete a record, select the delete mailing button.

Election Worker *** TEST DATA ***

Election Worker:
 Bethoney Ballard
 378 N 100 W
 Tremonton 84337

TRE4
 Republican

Notes
 Date
 10/04/2007 - Aaron McElwee
 She will be out of town and will not be able to make it.
 10/04/2007 - Aaron McElwee
 This person came highly recommended.

Phone (435) 432-9632 Cell used at polling place
 Phone 2
 Email bballard@whatever.com
 SSN Preferred Position Available Will Work Other Location

Assignment Positions Training Mailings Call Log

Date	Mailing Name	Election	By
10/04/2007	Training Reminder	Aaron McElwee	10/12/2007

Add Mailing
 Delete Mailing

Print Cancel

Call Log: Select the call log tab to track what calls have been made to each poll worker. To add a record select the add call button. To delete a record, select the record and then the delete call button.

Election Worker *** TEST DATA ***

Election Worker:
 Bethoney Ballard
 378 N 100 W
 Tremonton 84337

TRE4
 Republican

Notes
 Date
 10/04/2007 - Aaron McElwee
 She will be out of town and will not be able to make it.
 10/04/2007 - Aaron McElwee
 This person came highly recommended.

Phone (435) 432-9632 Cell used at polling place
 Phone 2
 Email bballard@whatever.com
 SSN Preferred Position Available Will Work Other Location

Assignment Positions Training Mailings Call Log

Date/Time	Reason	Result	By
10/4/2007 4:32:35 PM	To confirm receipt of survey	Received and sent back	Aaron McElwee

Delete Call Add Call

Print Cancel