Poll Worker Module Manual

IF YOU HAVE QUESTIONS PLEASE CONTACT US A 517-381-1830
OR AT KELLY@KONNECH.COM & BENGALICKI@KONNECH.COM

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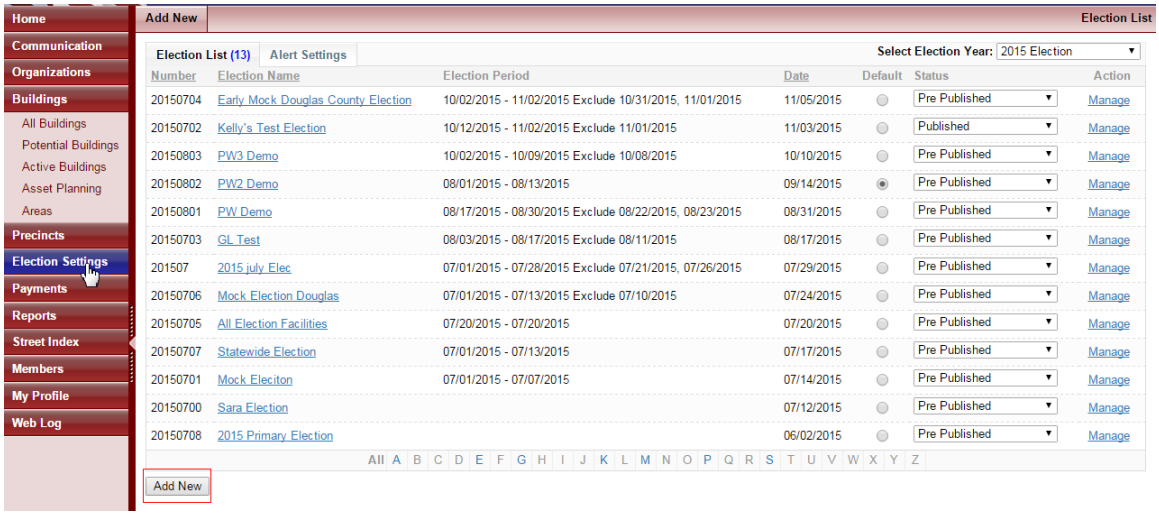
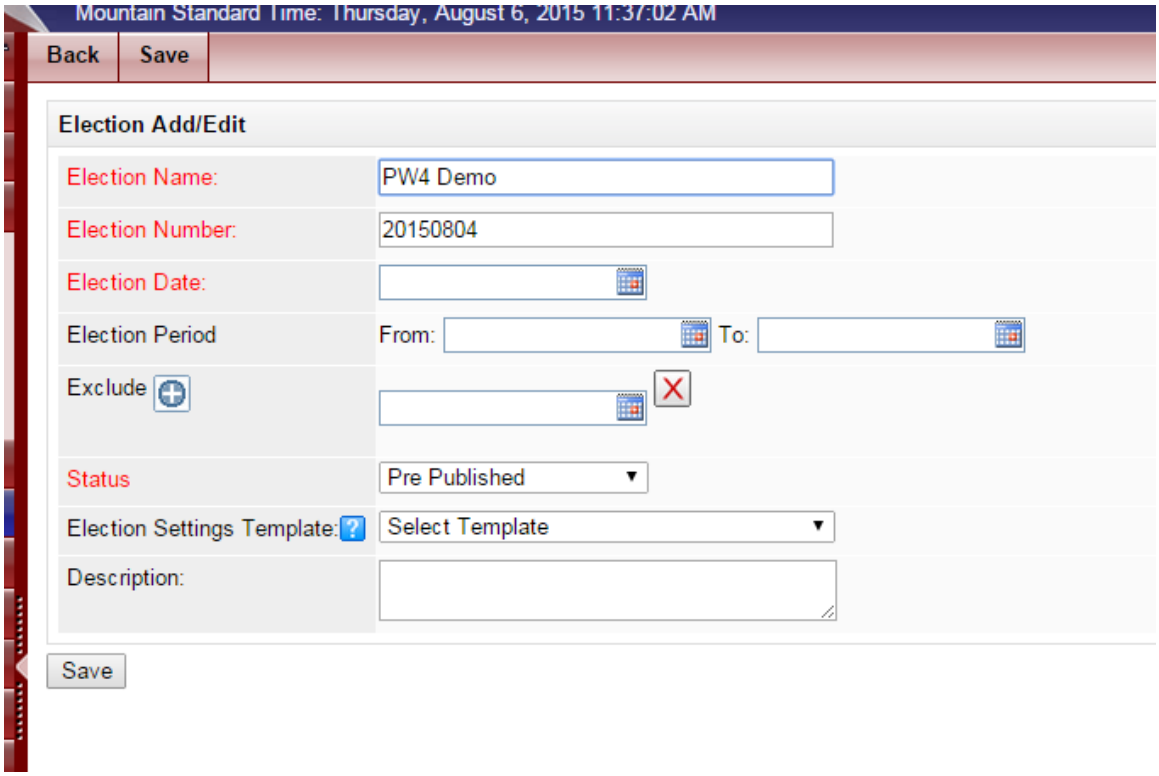
PLMS Tasks

Create your election

1. Election settings tab → click add new

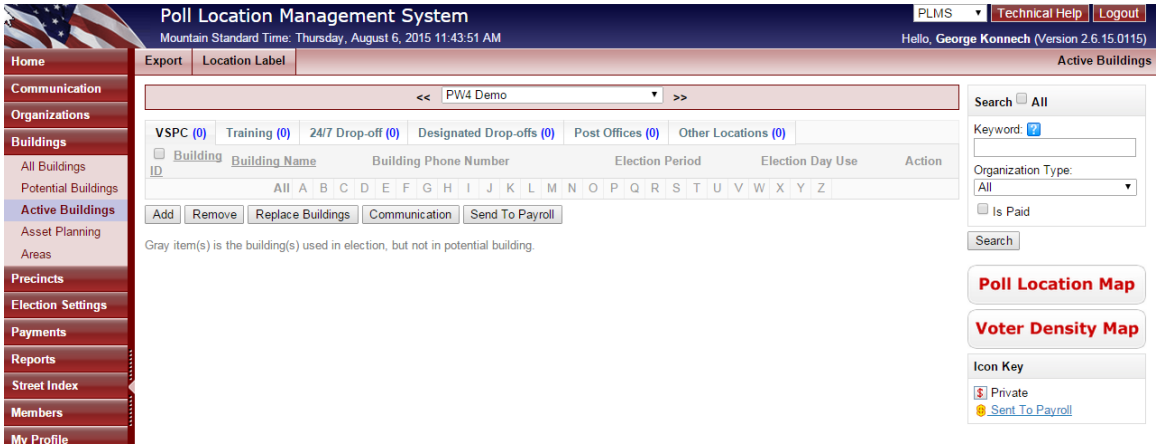


2. Define the detail needed:
   a. Election Name – this will be the name that is displayed in the dropdown at the top of most PollChief pages
   b. Election number – this is predefined but please edit if needed
   c. Election date – this is the election day. Click on the calendar icon to choose the desired day.
   d. Election period – this is the date range of early voting.
      i. Define the starting day and ending day in the calendar boxes.
   e. Exclude – this is how you can exclude a certain day from the early voting period.
      i. Click on the calendar icon to choose which day won't be open for early voting.
      ii. Click the icon to add another day to exclude if needed. Continue using this icon to add all the different excluded days.
      iii. To remove an excluded day, click the icon.
   f. Status – this drives information to the worker PORTAL, please ignore this for now.
   g. Election Settings Template – this example I'm choosing a blank option so you can go through all the steps.
3. Click Save.



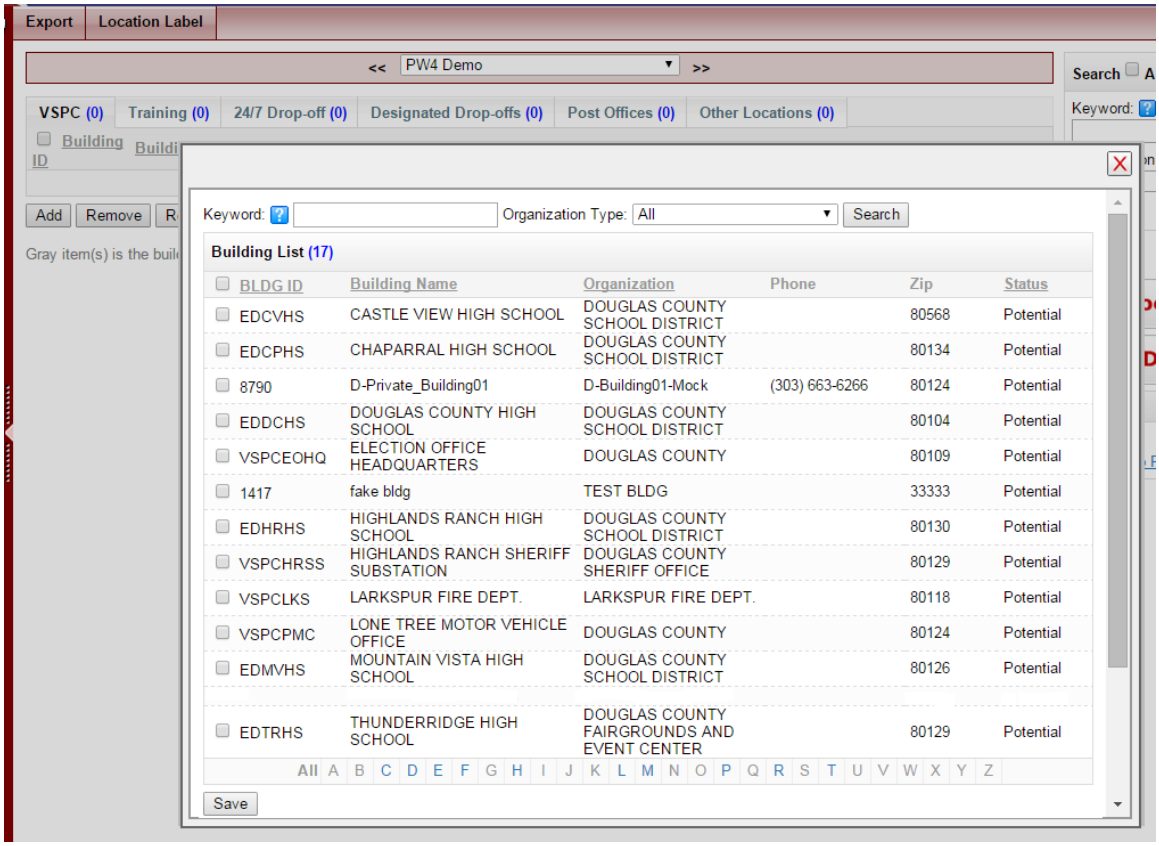
Defining your Active Buildings

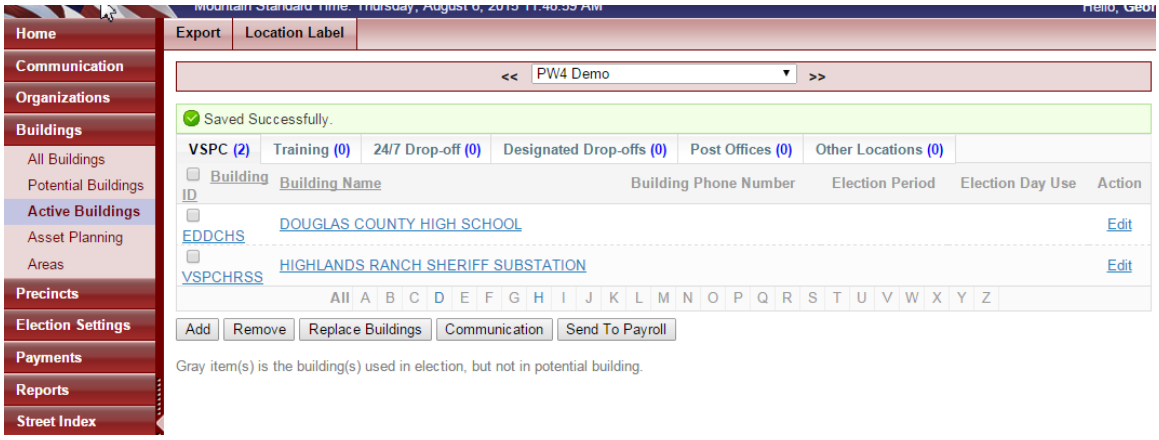
1. Click on the active building tab
2. Make sure the election listed at the top is your election you want to work out of.
3. Since we created an election with no template, there are no VSPC, Training, 24/7 Drop-off, etc. buildings defined.



Defining the VSPC centers

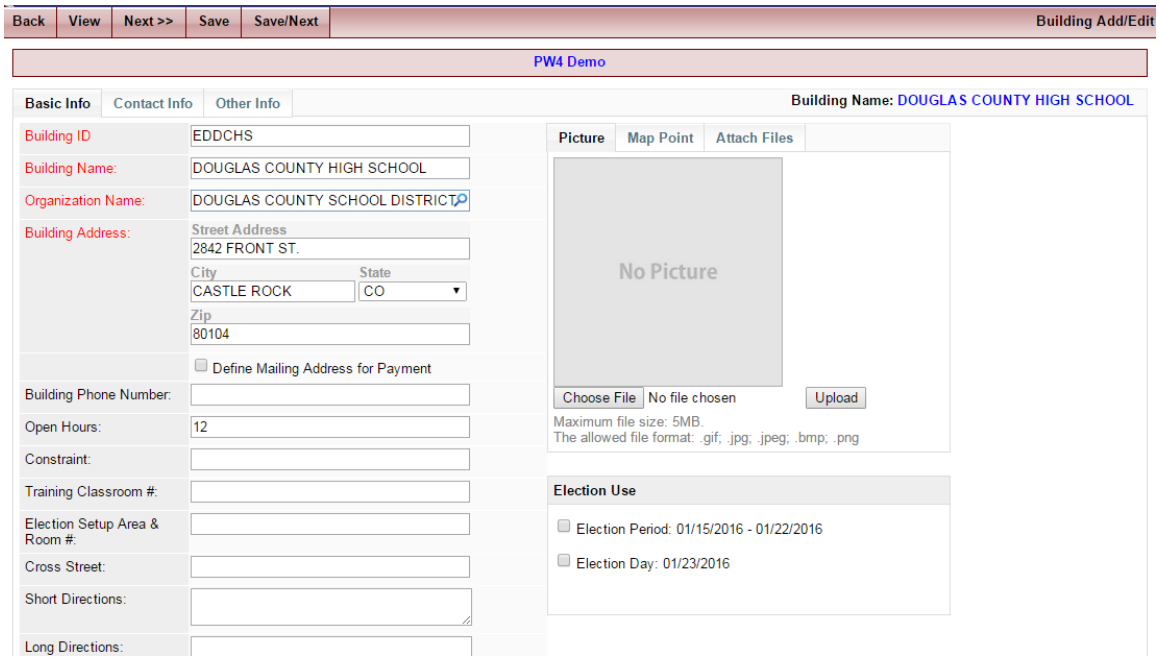
4. In the active building tab – make sure you're in the VSPC tab – click 'add'. The popup will be all your current 'active' buildings.
    a. Check THE boxes next to the buildings you want to make active for the building type.
    b. Click 'Save'. This will add them under the tab you are within.



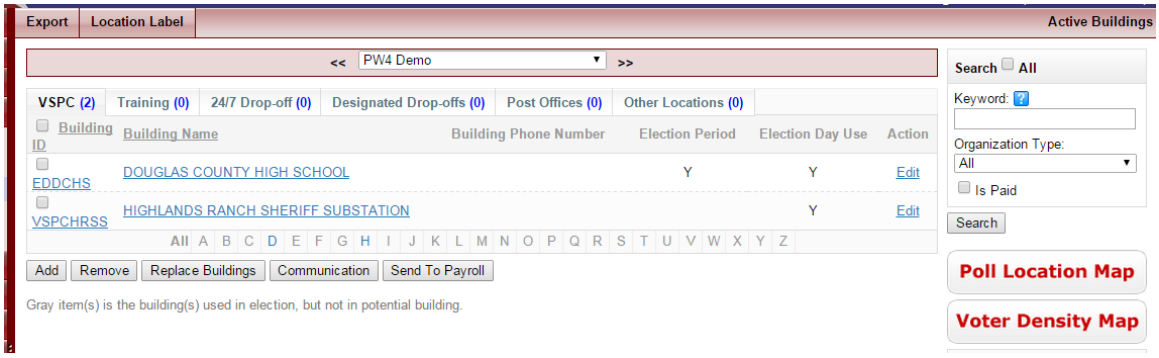


Defining the VSPC buildings as early voting use and/or Election Day use

1. In the active buildings tab, make sure you are viewing the VSPC tab for the election desired.
2. Click 'edit' across from a building.
3. In the building profile, locate the Election Use section. Check the box next to the desired early voting time period and/or Election Day period. This is how you will define the building's use for early voting and or for Election Day.
4. Click 'save' when finished. Click save/next to move to the next building in the list.

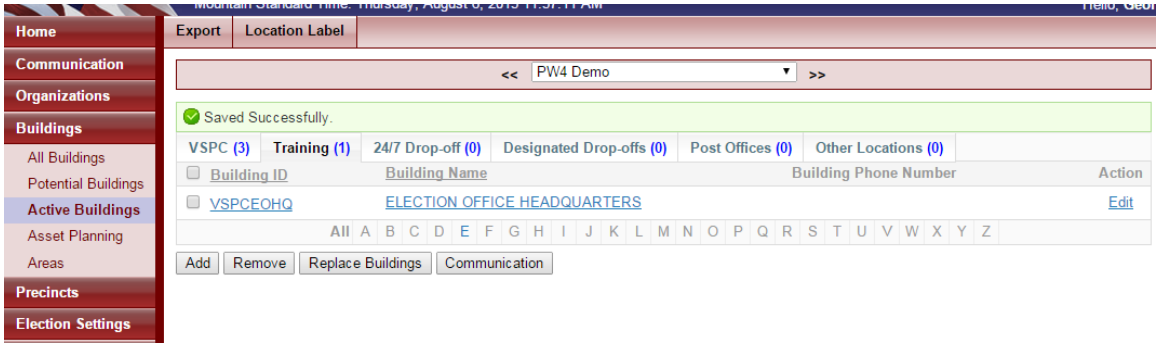


5. Back in the active building –VSPC tab, you'll now see the 'Y' in the different columns. This 'Y' is representing that 'yes', it's defined as being used for this type of election use.



Add buildings to the other types of election categories (ie. Training, 24/7 drop-off, designated drop-offs, other locations)

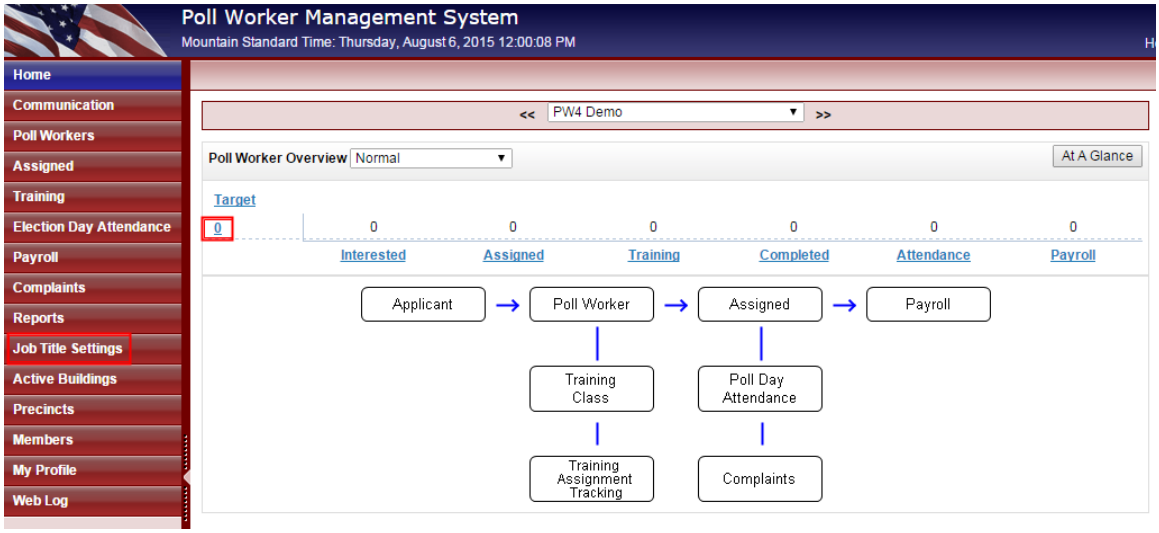
1. In the active building tab, click on the tab desired.
2. Use the 'add' button to have the popup appear. Check the box next to the building(s) you want to add under that category and then click 'save'.
    a. Note: you'll want to setup your training locations so that they are available for training class setup.



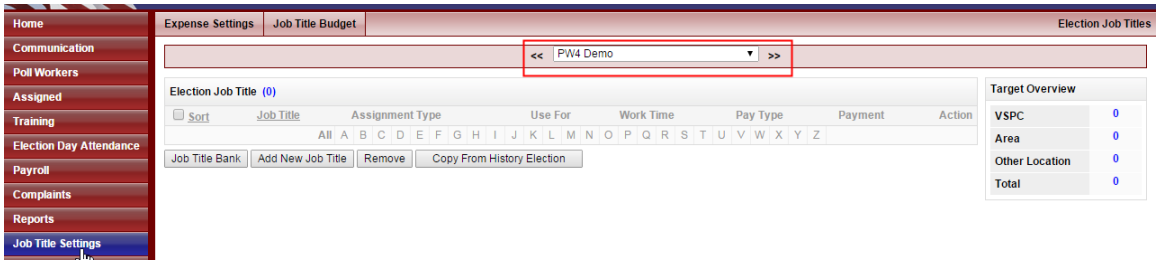
Poll Worker Tasks

Defining job titles for the election

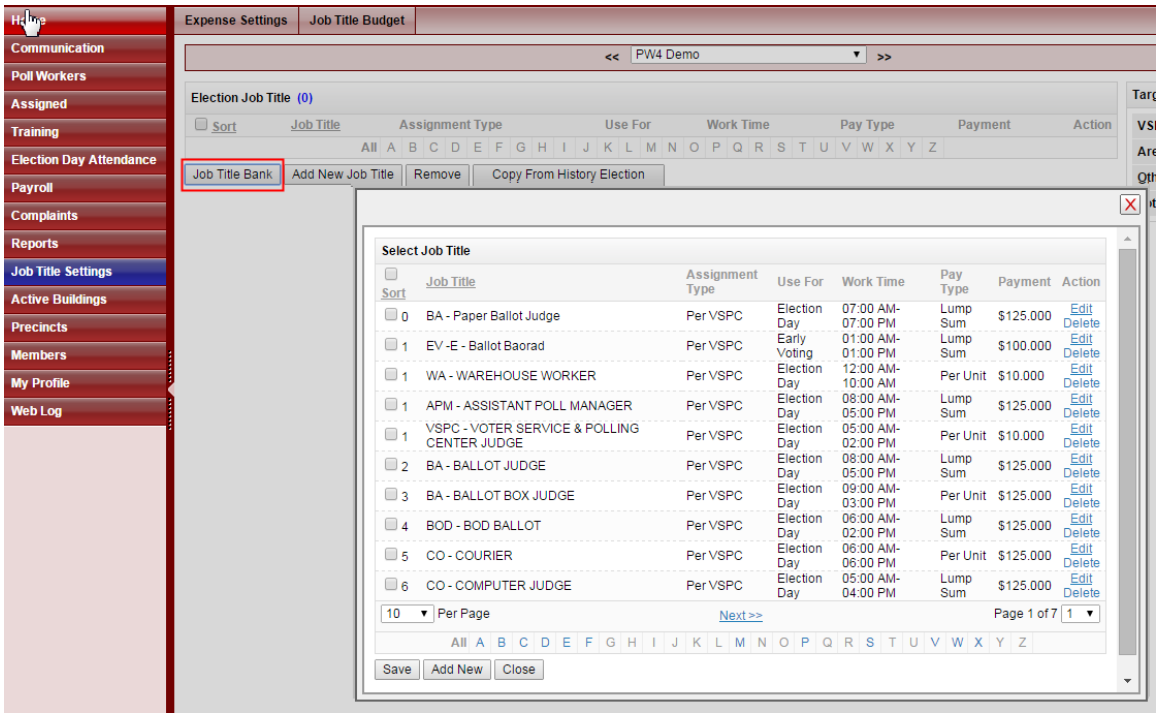
1. Either click on the target number or click on the job title settings tab.



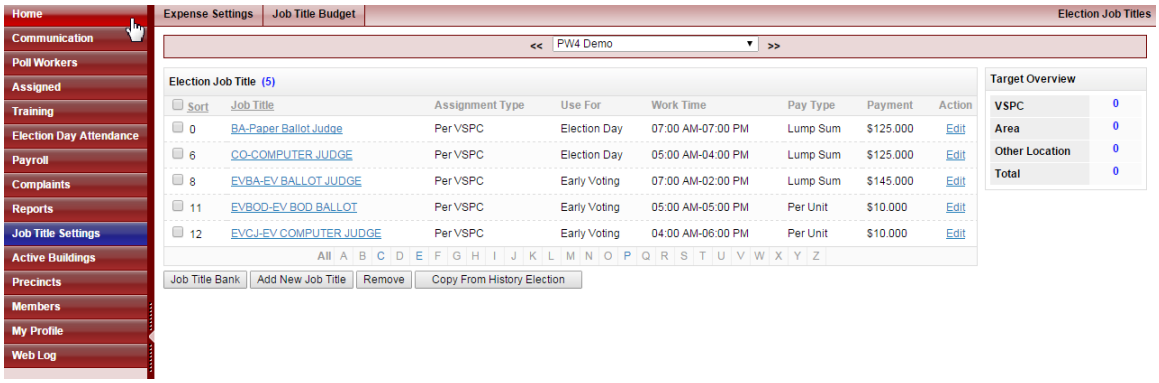
2. Make sure the screen is listing the election you want to setup job titles for.



3. Click Job Title Bank → this is the list of all your job titles which have been used in the past.
    a. Check the box next to the job title desired and click 'Save'. This will add the job title to the election.

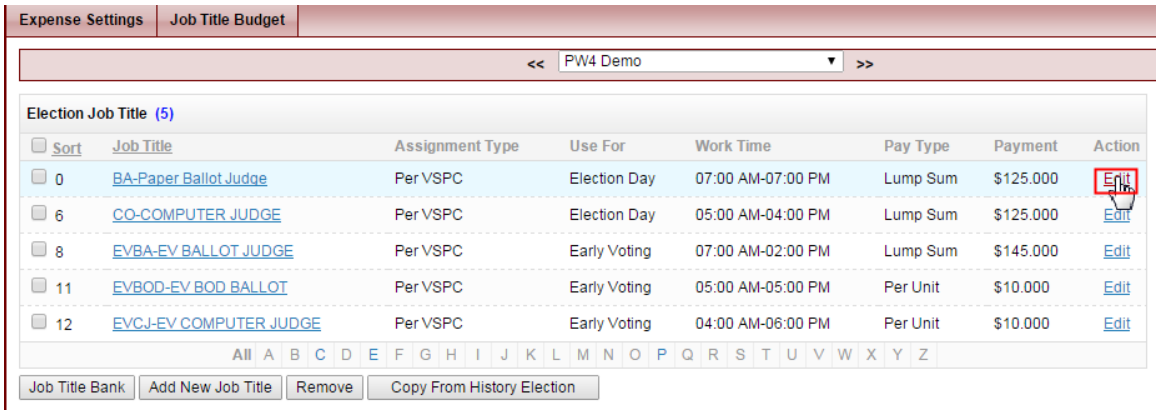


4. Each job title is setup either for Election Day or early voting use. Notice the 'Use For' column. This shows off the 'use'.
5. The Assignment Type column is showing off where the job title will be assigned: to a VSPC, to a building defined as 'other location' or to an area.

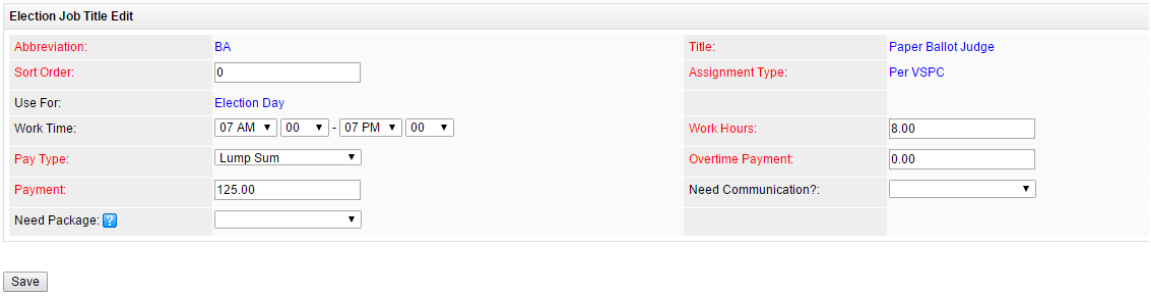


Editing job title information

1. In the job title settings tab, click 'edit' across from a job title.



2. In the 'edit' screen you can update:
    a. Sort order – this will just list the job titles in a specific order when in a list
    b. Work time – this is used for communication sent to the worker who is working this position. It also is very important for your Early Voting Job titles. It will help populate the hours the worker worked each day they were assigned.
    c. Assignment type – this will help populate this job title in the 'add job title' list for the building of the 'type' defined.
        i. For example a job title which is setup with a 'type' as per other location will not have the job title be available to be assigned to a VSPC center.
    d. Pay type – this is how you define if the payment will be lump sum or per unit.
        i. Per unit = hourly
    e. Payment – define the amount to be paid based on the pay type.
    f. Use for – this is how you define if the job title is for Election Day use or early voting.
    g. Need package – set this to 'yes' if you want in PAMS to be able to pack a container of items for each person assigned this job title.
        i. If no or left blank – it will not be in PAMS
    h. Need Communication? – If defined as yes, the job title will be available to assign a county assigned cell phone to each worker of this job title.
    i. Work hours – the amount of hours that a shift consists of
        i. Usually 8
    j. Overtime Payment – the pay rate for overtime hours

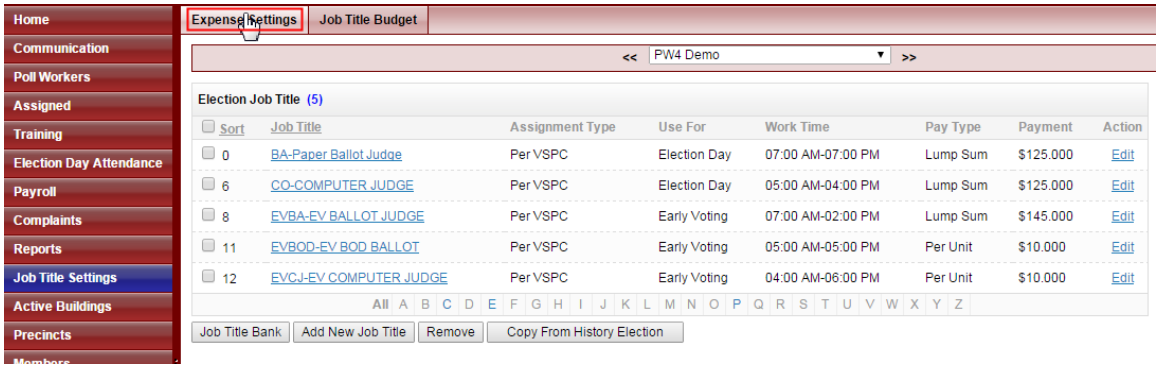


3. Click 'save' when finished editing.

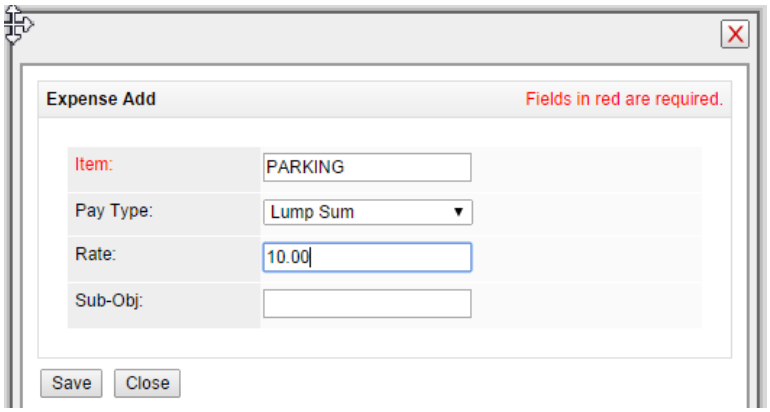
Extra Expenses

Extra expenses are extra pay options to provide to a job title that is different than their Election Day pay or training pay. For example overtime, mileage reimbursement, etc.

1. Job title settings → click extra expenses



2. Click 'Add' to add a new expense.
   a. If the expense is one that you want to give an exact amount to each worker of a position, I recommend using 'lump sum'. Define the amount you want to give the worker in the 'Rate' field. Leave the sub-obj field blank.

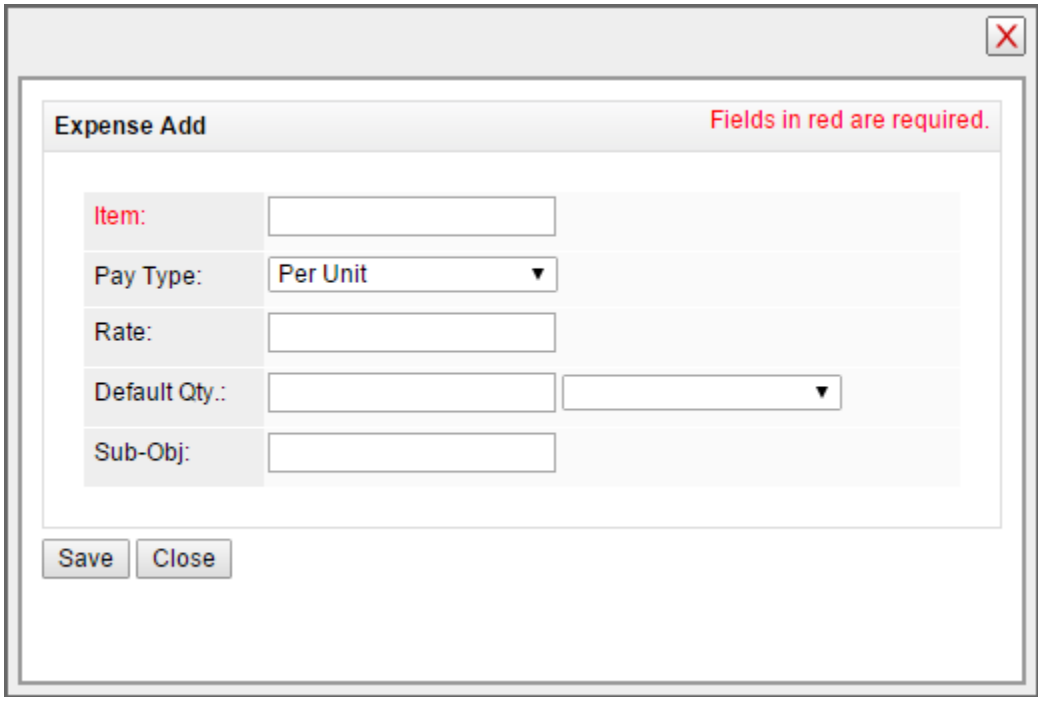


   b. If the expense is an optional payment for a position, it would be best to use the pay type per unit for the expense. For example Mileage – some workers may need to be reimbursed for this. Having this expense setup as per unit, the mileage reimbursement will only be applied to the worker IF you populate how many miles driven. If you leave this expense blank in the worker's payroll profile, then they won't be getting any money for miles.
      i. Setup the expense like so:
         1. Pay type: per unit
         2. Rate: the amount you want to give per mile
         3. Default qty: this you can populate with '0' or a number.
            a. Leaving it at 0, this would start every position off receiving 0.00 for miles. You then would have to type in

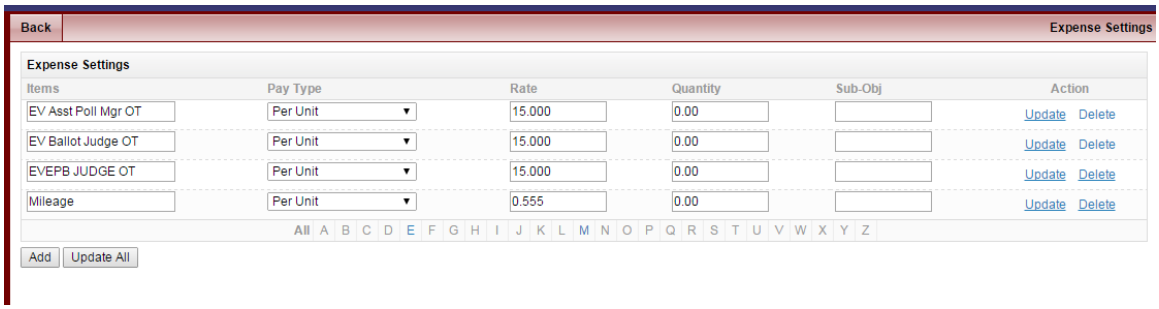
the amount the worker drove for the system to then to the math of how much they should receive.

b. Populating this with a number, for example '10', this would start everyone off saying they drove '10' miles. So 10 miles x 0.55 = $5.50. This means every worker would start out with $5.50 for miles. You of course in the worker's payroll profile edit the number 10 if needed.

c. Leave sub-obj blank.



3. The expenses defined are currently setup to be chosen for a job title. You can edit existing ones or add new.

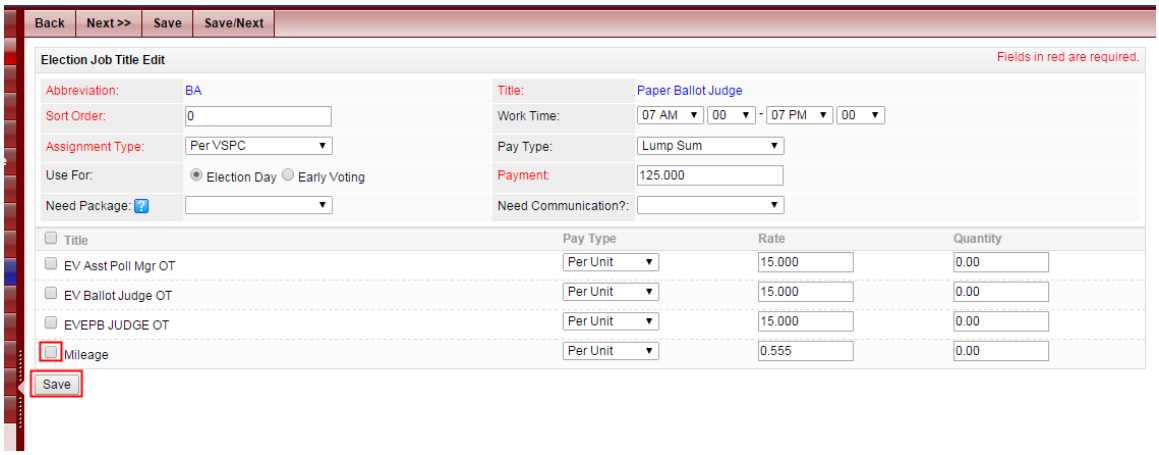


4. Edit the name, pay type, rate, quantity for one row and click 'Update'.

a. Note: ignore the sub-obj → based on our payroll discussion, you won't use this so I'll have it removed

Defining expenses with a job title

1. In the job title settings tab, click 'edit' across from a job title.
2. At the bottom of the screen, you'll see the expense options. Click the check box next to the expense you want active for this job title in the payroll.
3. Click 'save'.



Assignment Needs

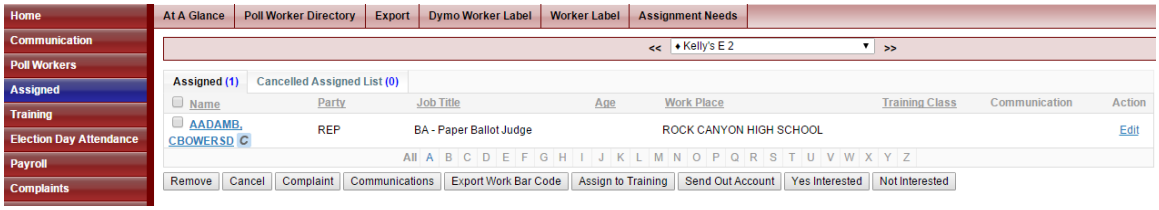
The assignment needs page is very helpful to allow you to see the day by day job title need and who's assigned.

Here is where you can define the job title need at the sites for the different day and then also the target need per job title.

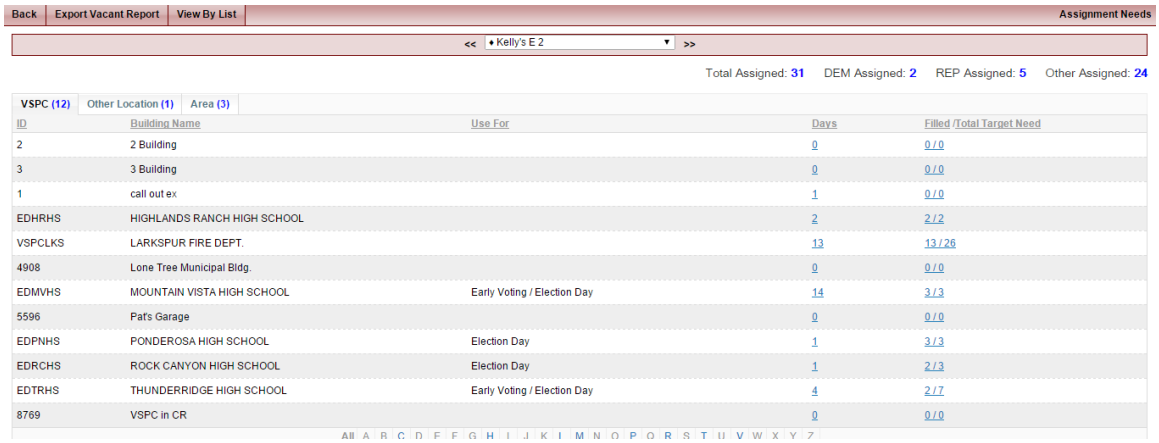
You can assign workers to the job titles from this tab.

Setting up job titles and target need at the buildings for the election

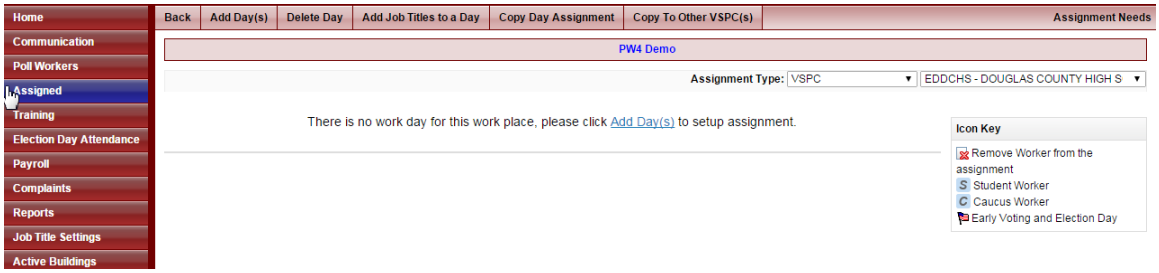
1. Click on the Assigned tab.
2. Click on the Assignment Needs button.



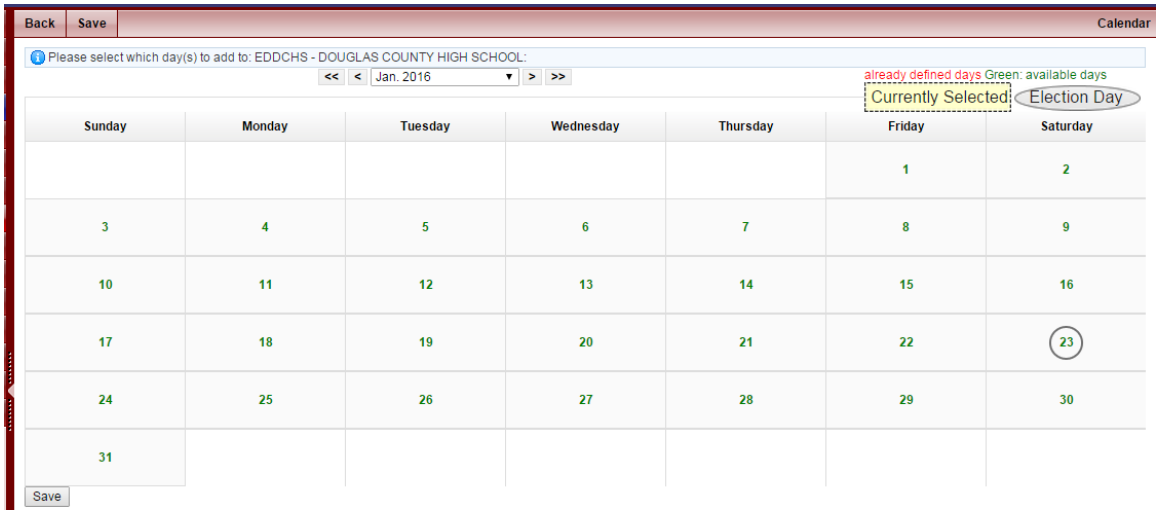
3. The next screen will list out the different types of places a worker could be assigned: VSPC, Other Locations, Areas.
4. The 'use for' for VSPC tab is showing off if the building is setup for early voting use and/or Election Day use.



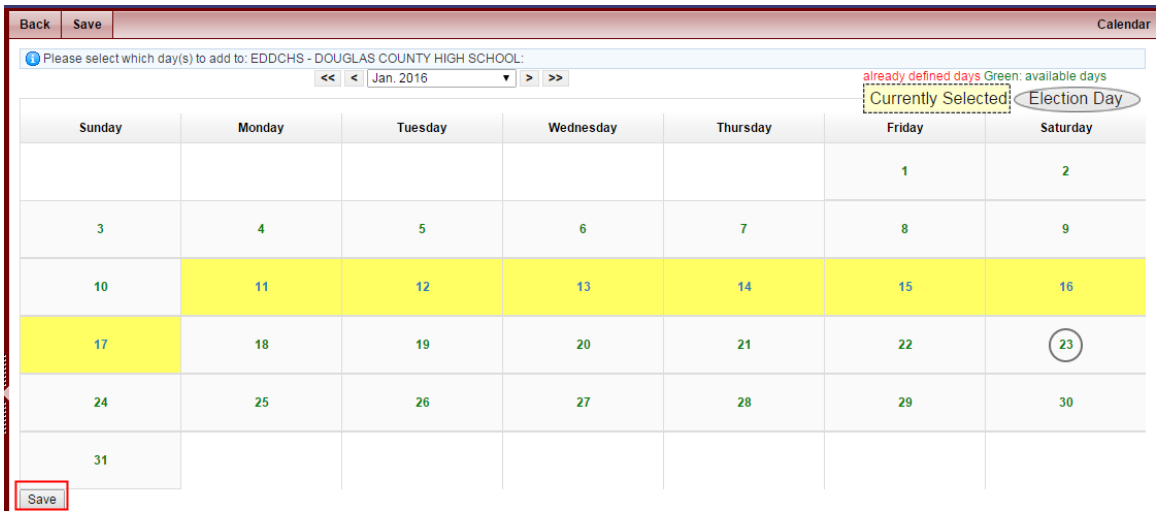
5. Choose one of the VSPC's as your building that you will add job titles to and then apply to other locations. *NOTE: Once you set up all of your days, you can export a list of all the job vacancies via excel by clicking on "Export Vacant Report," OR click on "View By List" to bring you a screen that lists all of the position slots and who they are filled by (or not filled).*
    a. Click on the day number across from the desired location. For example the blue '0' across from 2 Building. The next screen you'll see is one telling you there are no work days defined yet for the building. Click 'Add Day(s)'.



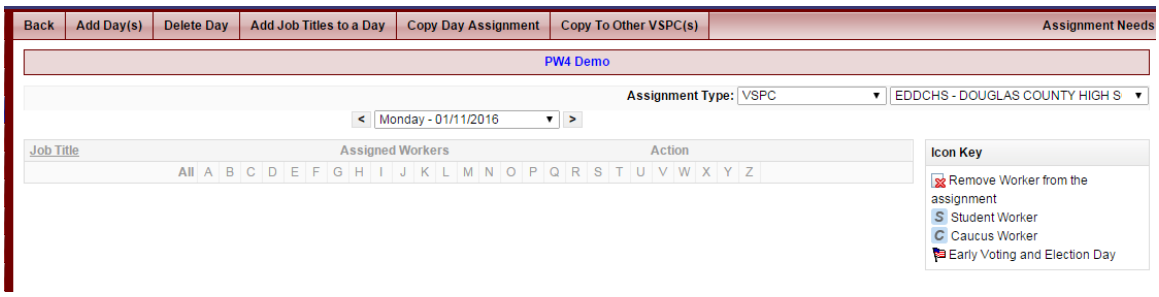
    b. The next screen will be the calendar. The Election Day is defined with a circle. In this calendar, you'll want to define the early voting day(s) the building is going to be open.



c. The days you choose will activate to a yellow background. Once all the days are defined, click 'Save'. This should change the day numbers to 'red'. The red coloring is trying to tell you these days are already setup as active days for the building.



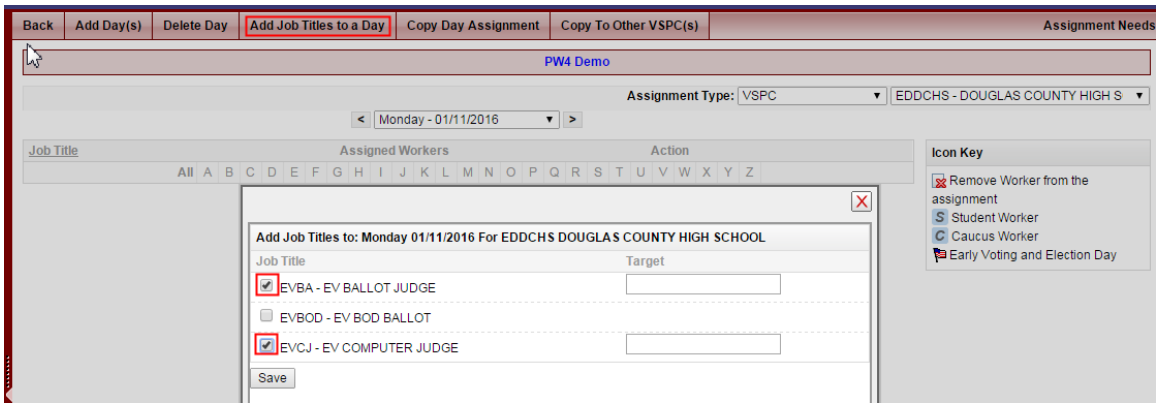
d. Click 'back' to return to the day by day screen for the selected location. (see image below)



e. Click 'Add Job Titles to a Day' to add job titles and the target need to the day for the selected building.
   i. The job titles that are showing are only for the type of building you are viewing ALONG with the type day you are currently within. For example I'm viewing a VSPC location on a day that isn't defined as 'election day'. Therefore the job titles in the popup are early voting job titles.

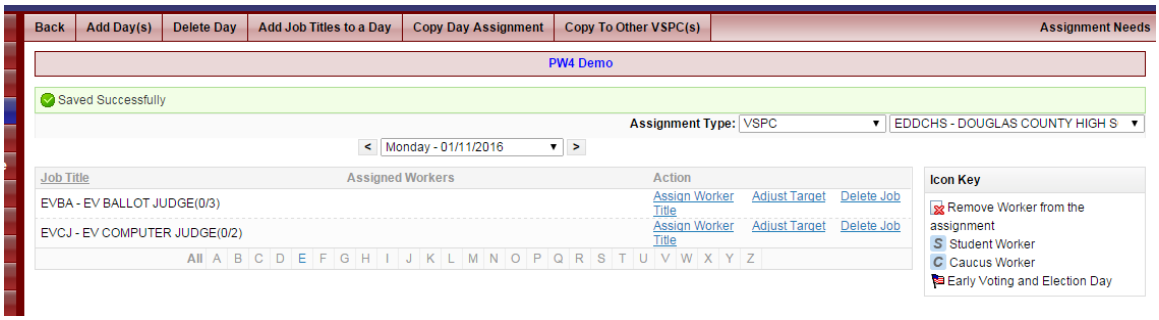
f. Check the box next to the job title you want to assign to the day. This will activate the 'target' field. Type in the target amount.
   1. Note: the target is the number of workers you want to be staffed for the job title on the day at the building.

g. When finished, click 'save'.



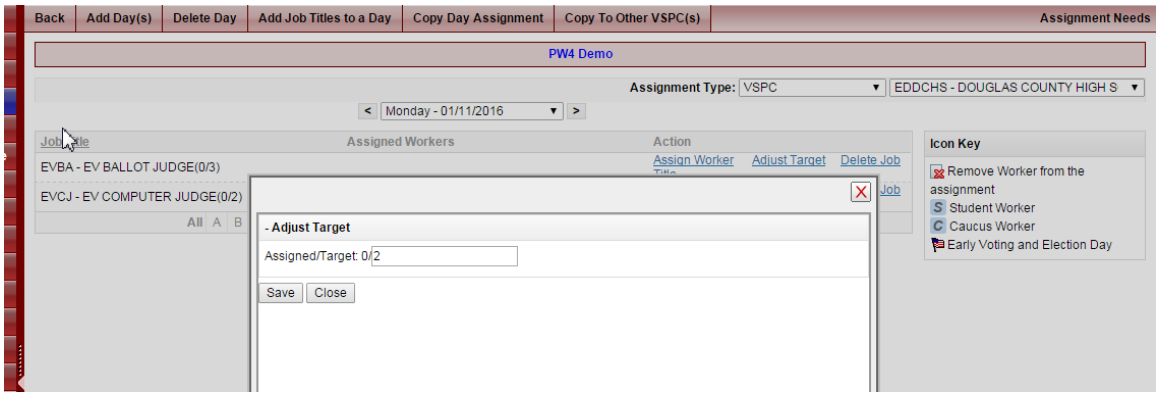
h. The job titles you chose should now be in the screen along with your target need.
   i. The (X/X) = target need. This is representing number of workers assigned to this job title / target need

i. Continue clicking 'add job titles to a day' to add more and more job titles.
   i. If the job title you want to add isn't listed in the popup, go back to the job title settings tab and make sure the job title is listed within the screen for the correct 'assignment type' and 'use for'.



Editing the target need

1. For the day and location desired, click 'Adjust Target' across from the job title you want to edit.
2. In the popup, change the target need and click 'save'.



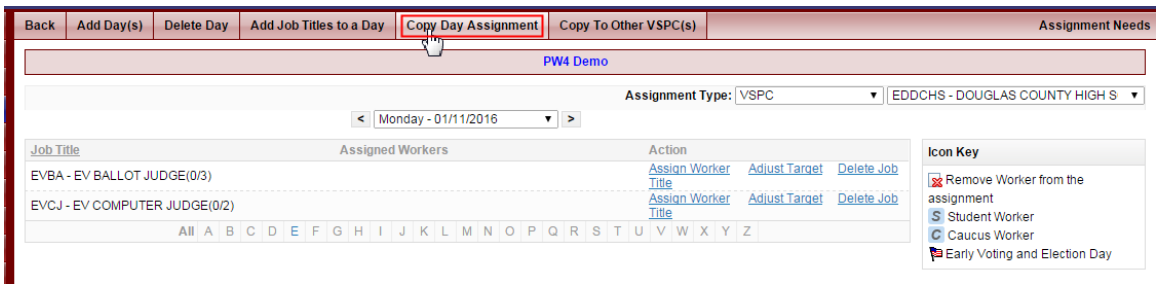
Deleting a job title

1. For the day and location desired, click 'Delete Job Title' across from the job title.

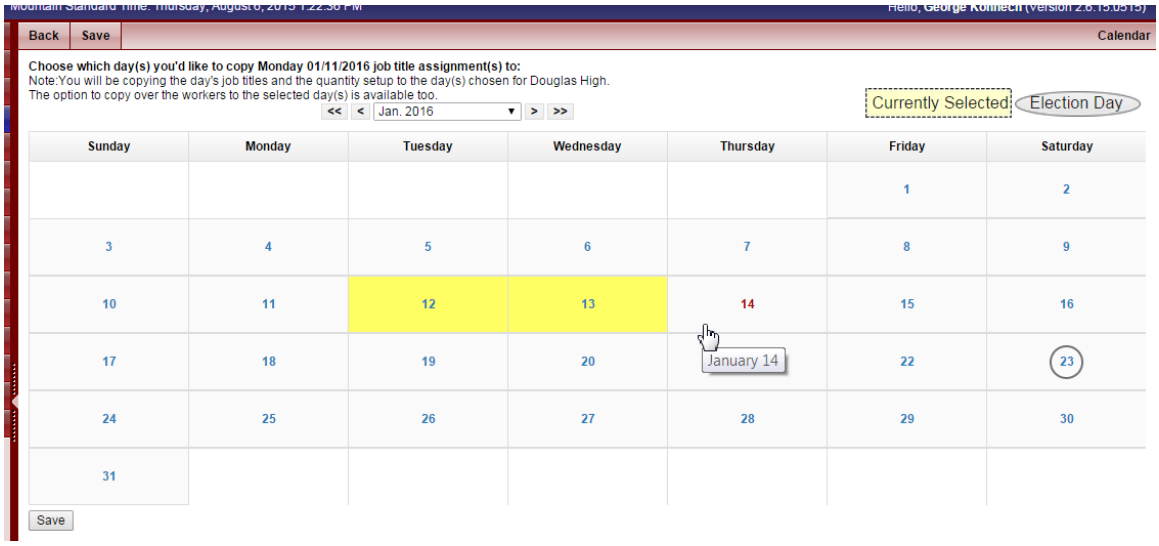
2. This will only delete the job title if no workers are currently assigned to the position for this day and this building.

Applying a day job title and target need to other day(s)

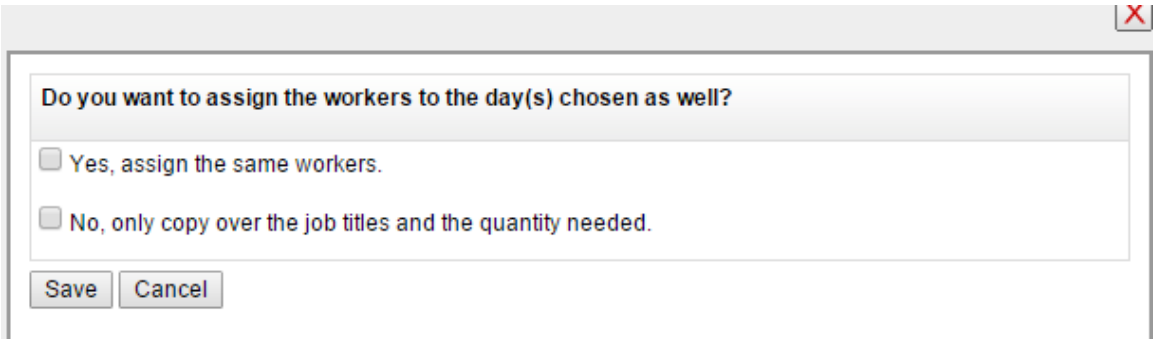
1. In the assigned tab → click on assignment needs
2. Click on the day number across from the desired location. It will default open to the first 'open' day for the building.
3. Click 'Copy Day Assignment' to apply the current job title and target setup to a different day for this building.
    a. For example my image below is for Douglas County High School. You can take this Monday day assignment for early voting and apply it to the Douglas County High School for Tues/Wed/Thurs/ etc.



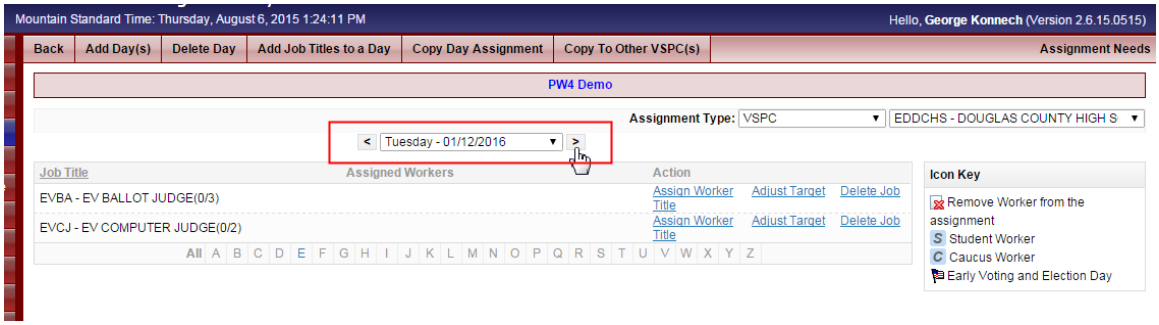
4. In the next screen, click on the calendar days you want to apply this Monday assignment to.



5. When ready, click 'save'. This will generate a popup asking what you want the copy to include: Just the job title and target need? Or the job title, target need and the current workers assigned to this day.
    a. Choose your option and click 'save'.

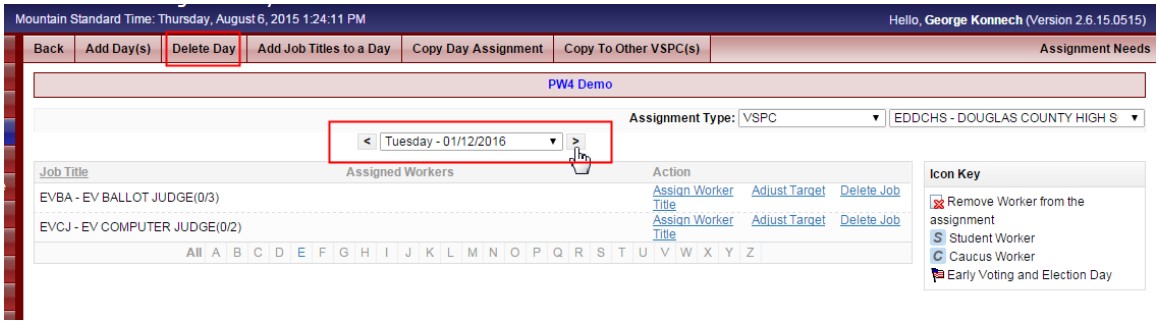


6. Now, for the job title, target need and workers (if there were any and you chose that option) will be available for the days selected.

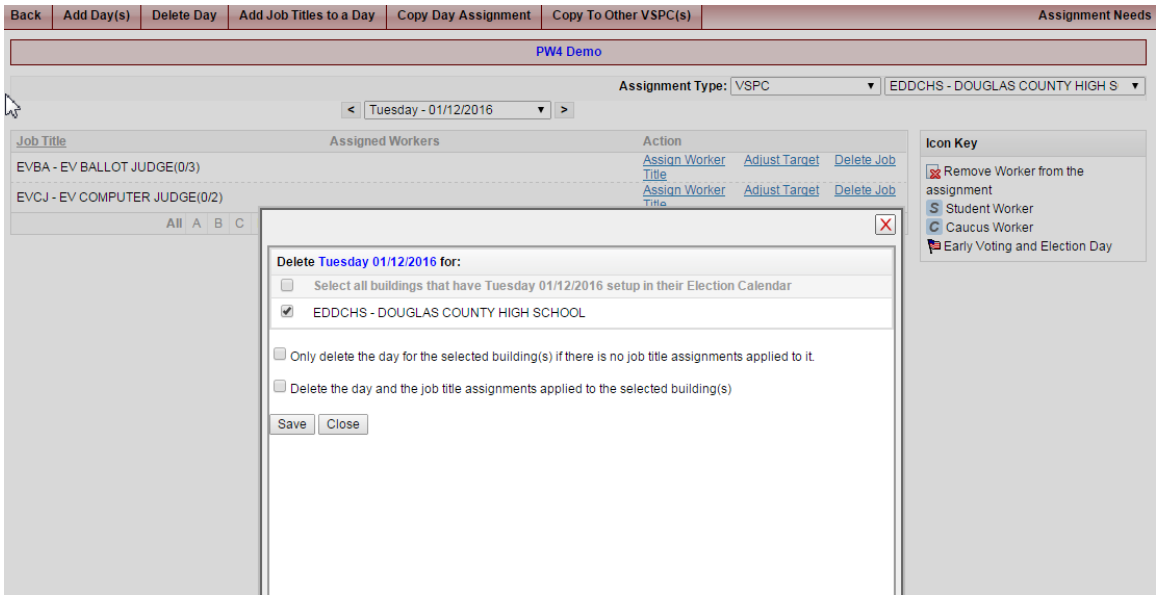


Deleting a work day from a building

1. In the assigned tab → click assignment needs.
2. Click on the number of days across from the desired building that has a day you'd like to delete.
3. Use the dropdown in the middle of the screen to choose the day you desire to delete.



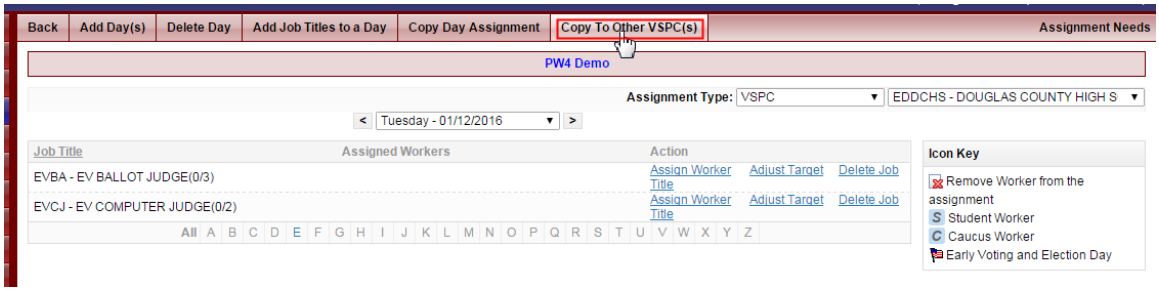
4. When the day is displayed, click 'Delete Day'.
    a. The popup will show off all the buildings that have that day setup in the election calendar. You can choose which buildings to delete the day out of.
    b. Choose the option you'd like and click 'save'.



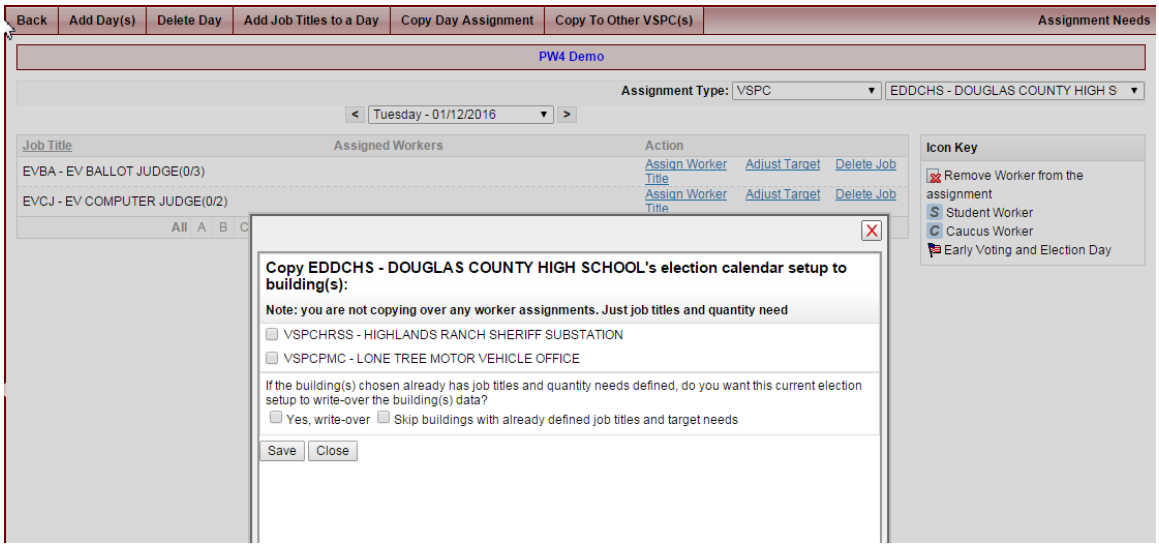
Applying a building's full calendar of election days and job title target needs

Once you have one building's days and job title and target needs setup for the full election period, you can apply it to all the other sites of the same type. (For example you can only apply a VSPC setup to other VSPC buildings. You can't apply a VSPC setup to an 'other location').

1. In the assigned tab → click Assignment Needs
2. Click on the number of days across from the building desired.
3. Click on the button called 'Copy to Other VSPC(s)'.



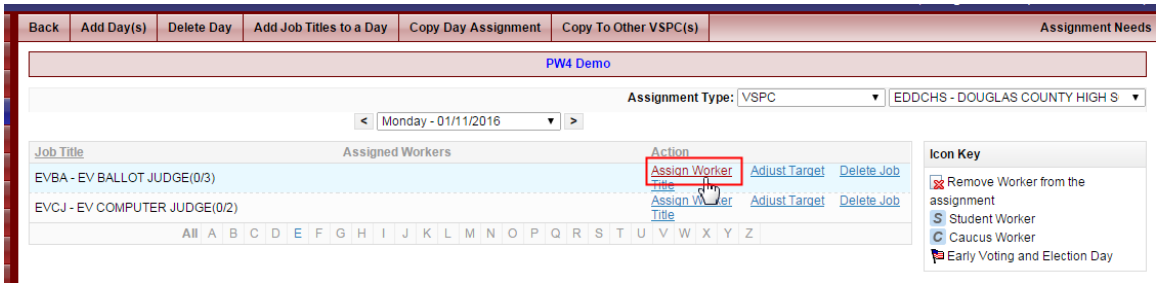
   a. This will activate a popup – choose which buildings you want to apply the site's full assignment of information to.
   b. Choose the assignment setup desired and click 'save'.



Work assignments

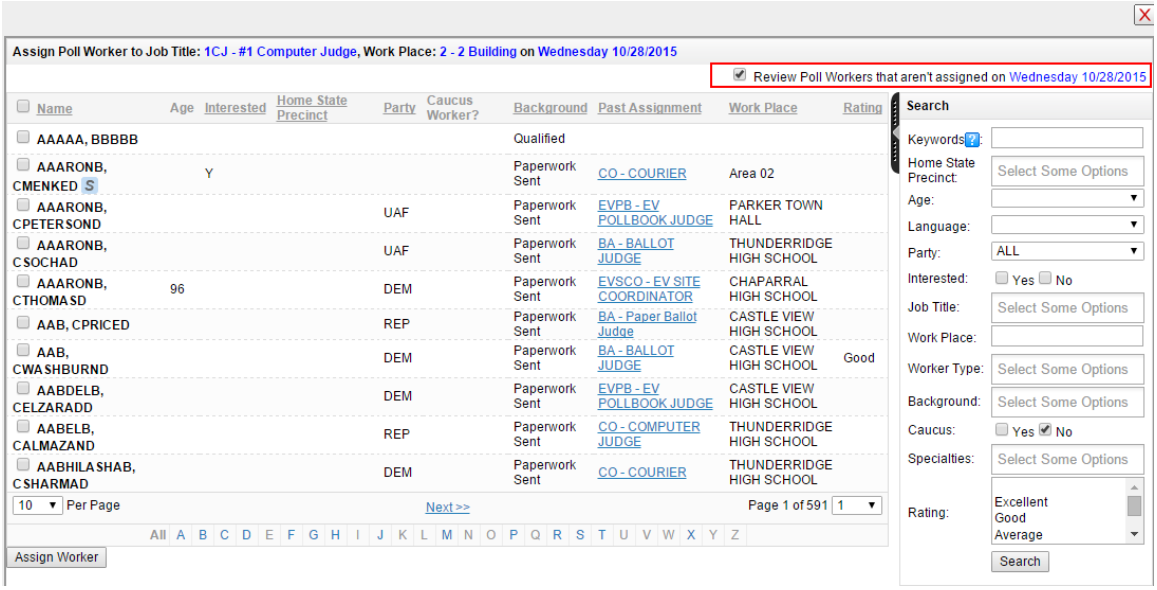
Assigning workers to job titles from the building calendar

1. In the assigned tab, click assignment needs
2. Click on the days number across from the desired location
3. Choose the day desired to add a worker to.
4. Click 'Assign Worker' across from the job title you want to put a worker at.

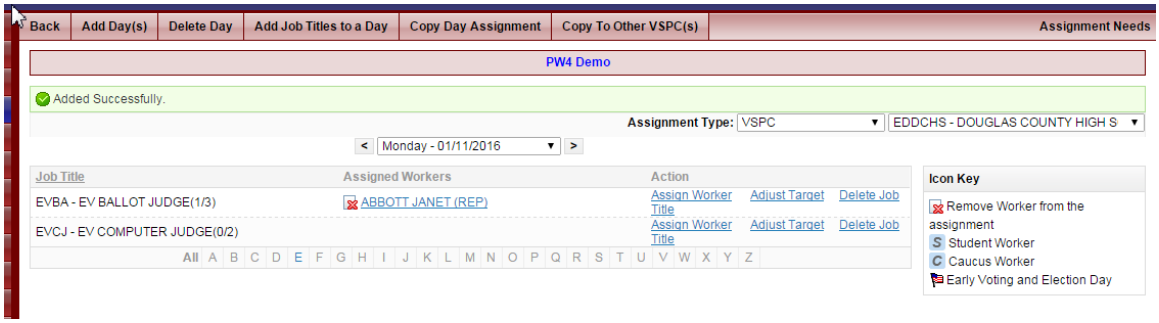


5. By default, the popup have 1 filter set: to only show workers who currently aren't assigned to this specific day.

6. Click the check box next to the worker name you want to fill that job title and click 'assign worker'. (note: you can choose multiple workers at once)

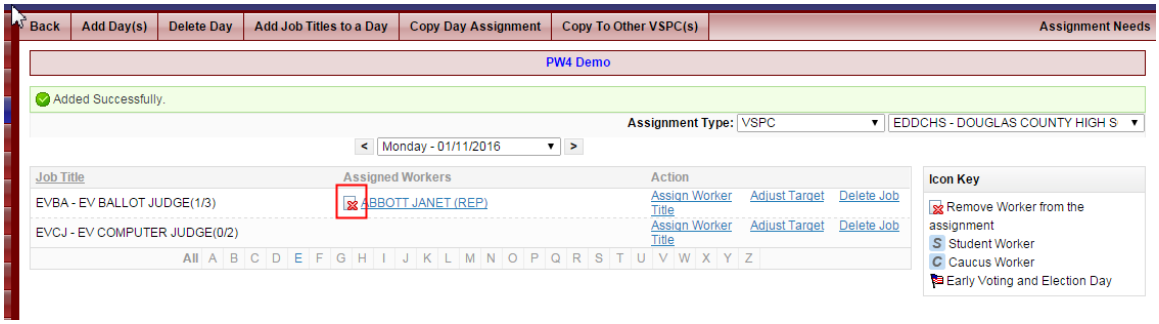


7. You'll see the worker name across from the job title. The worker's name will have the party affiliation in parenthesis next to it. The name may also have some icons next to it to help define the worker as 'student' or 'caucus' or a worker with ev and election day job title assignments.



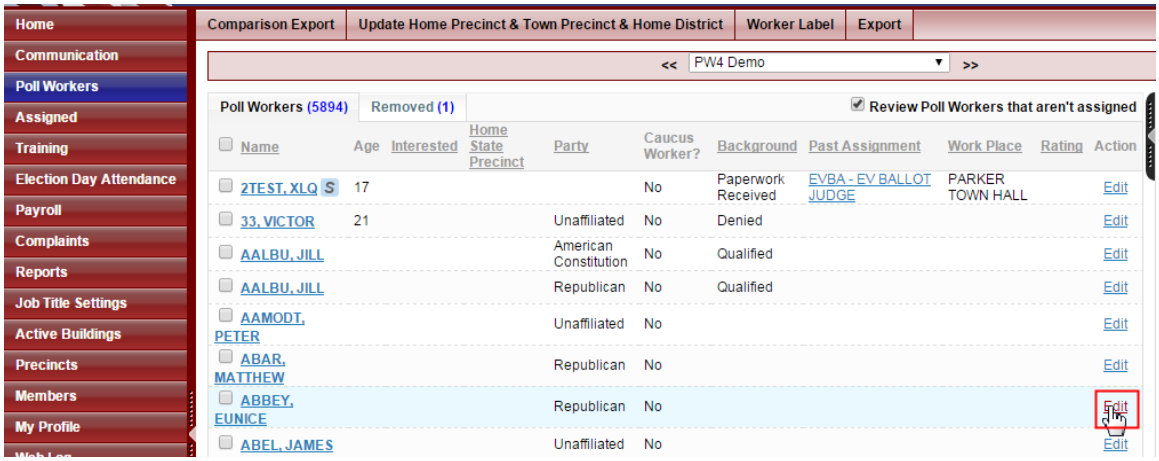
Remove a worker from the job title using the election calendar

1. In the election calendar list for a building, check the red 'x' next to a worker's name to remove them from the days job title.

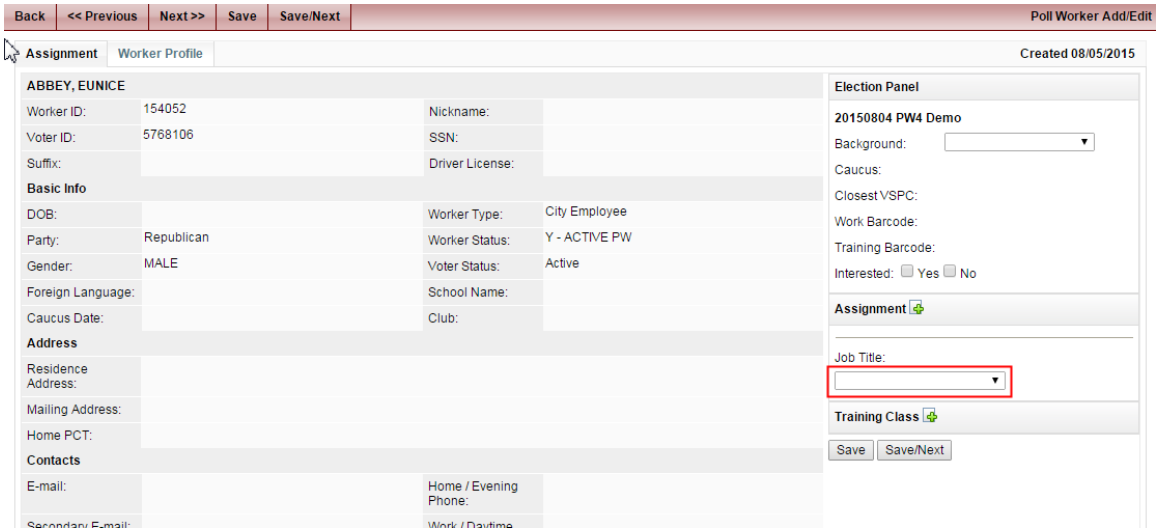


Assigning workers to a job title from the worker profile

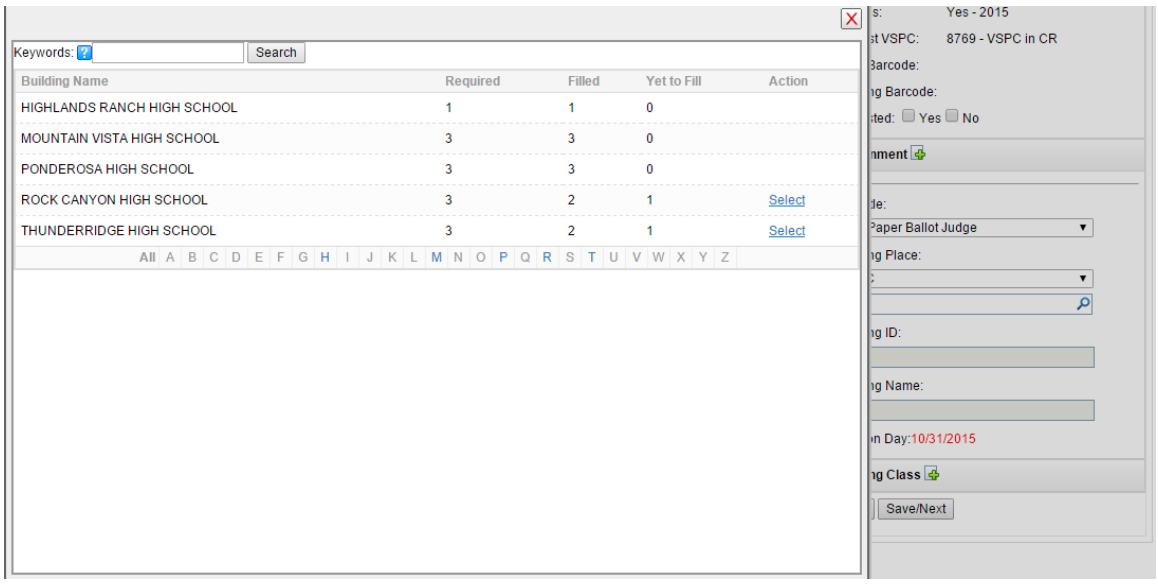
1. In the poll worker tab → click 'edit' across from a worker.



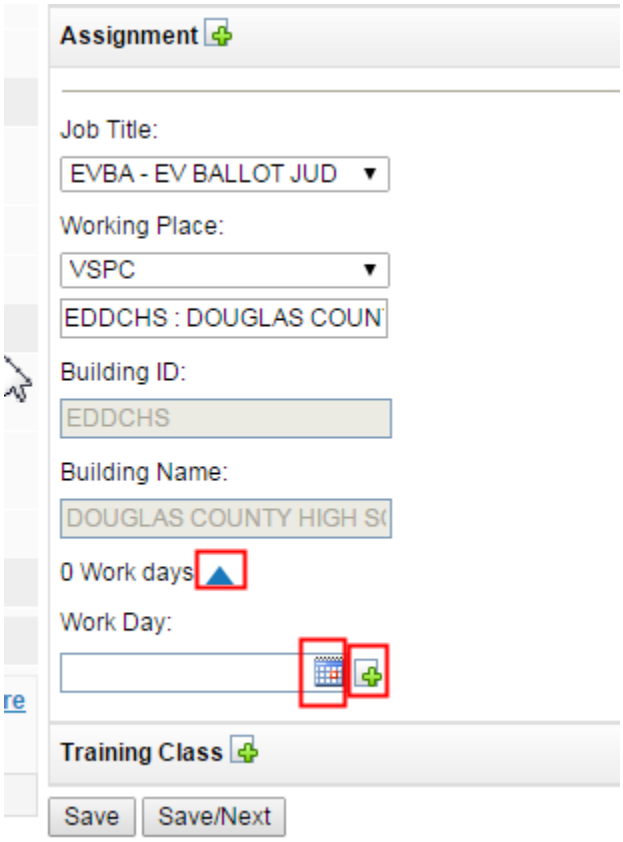
2. Click on the 'assignment' tab.
3. Click on the assignment dropdown to choose a job title you want to assign the worker to.



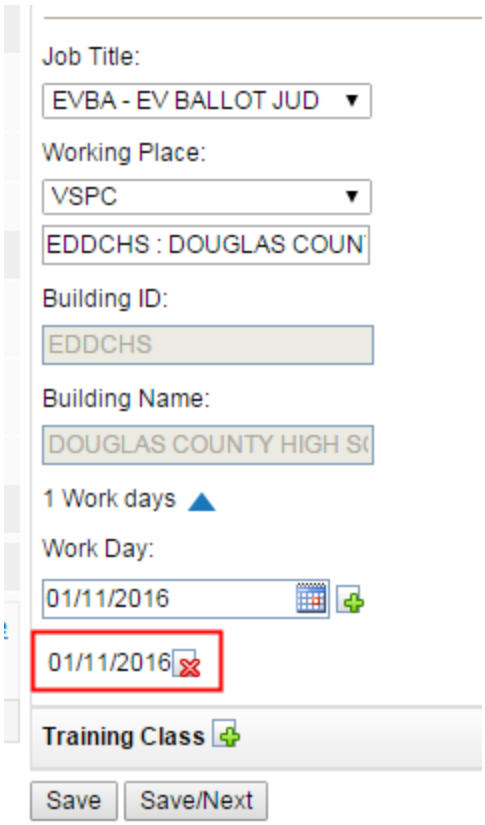
4. Once you choose a job title, the building list window will adjust to the buildings that are intended to have that job title chosen work at. For example if I chose an early voting job title, the building list would be the early voting locations.



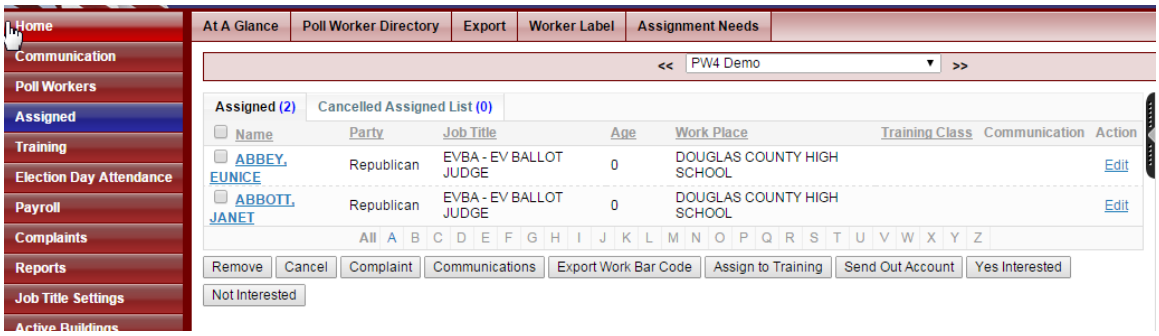
5. You'll then have to choose which days you want the worker to work on for the job title/place chosen.
    a. Click the blue triangle to show off the calendar feature. Choose which day you want to add to the worker's schedule and then click the green plus sign.



b. The calendar date(s) showing with a red ‘x’ depict the days the person is setup to work.

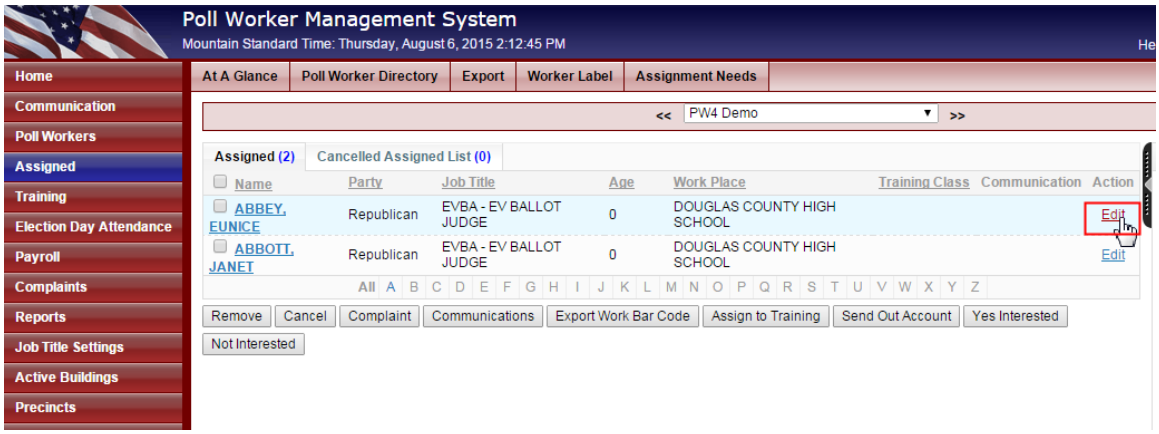


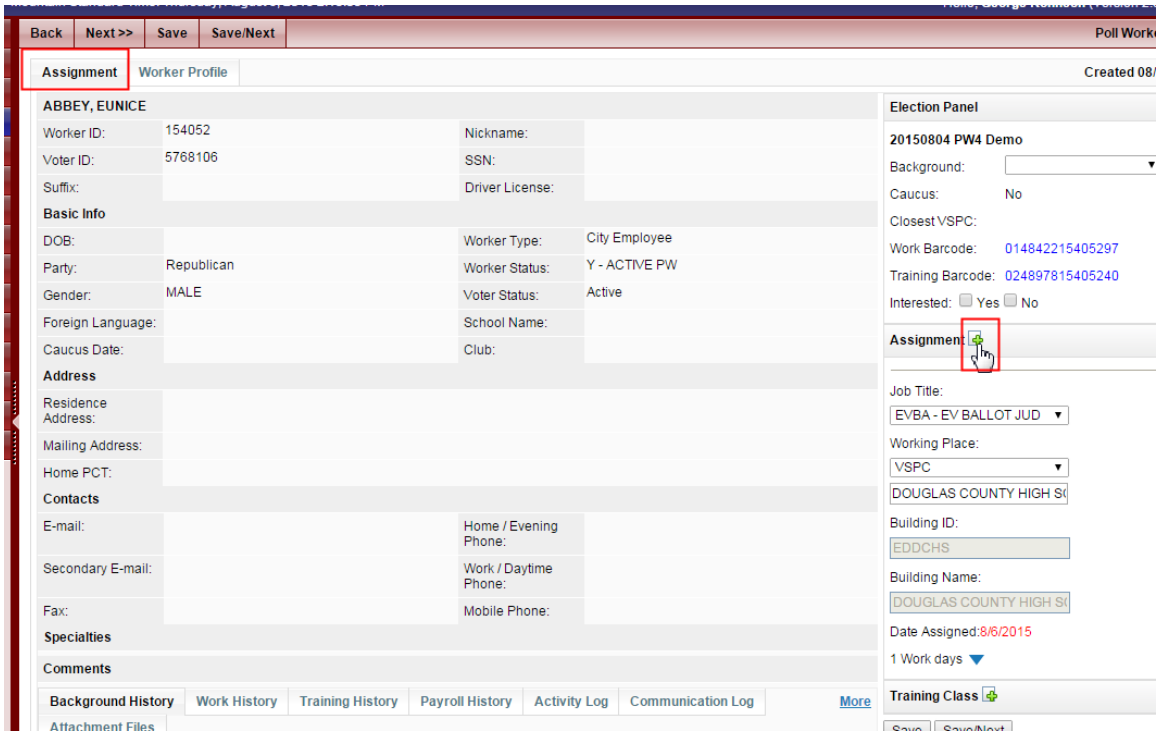
c. Continue to click the green check mark next to the calendar item to add another day to the worker's work calendar.
d. Click 'save' when finished. The worker's name will now be in the Assigned tab with the election work assignment. Their name will also be added to the assignment needs tab for the job title they filled.



Adding a 2nd assignment to a poll worker's work schedule

1. In the poll worker tab, or the assigned tab, click 'edit' across from a worker's name.
2. In the assignment tab for the worker profile, click the green plus sign next to the word 'assignment'. This will activate a new assignment box to give the worker another job title assignment.



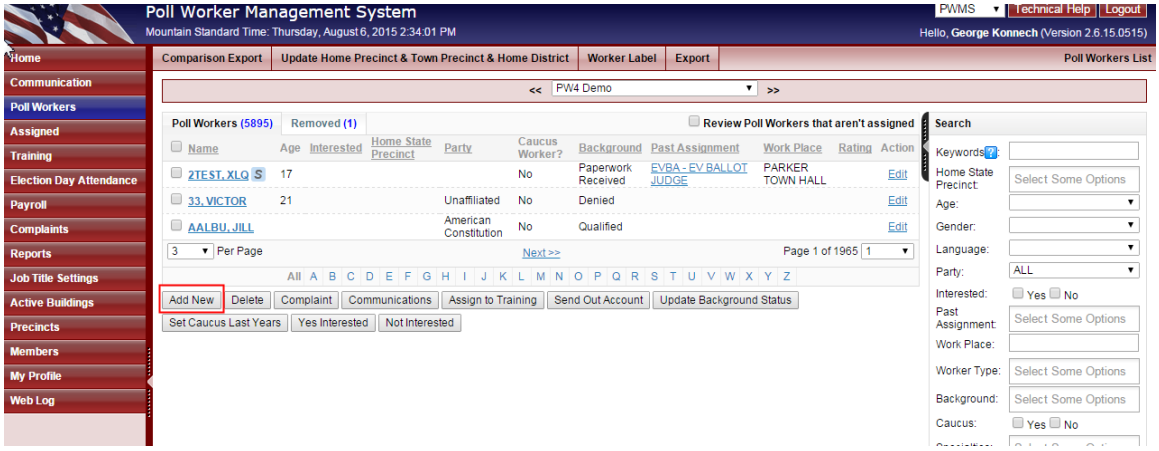


3. Again choose from the job title dropdown a job title. This will activate the working place dropdown.
4. Choose from the working place dropdown by clicking in the field.
    a. If you chose an Election Day job title, there will be feature to allow you to choose which 'days' the person will work. It's strictly only Election Day.
    b. Click 'save' to complete.

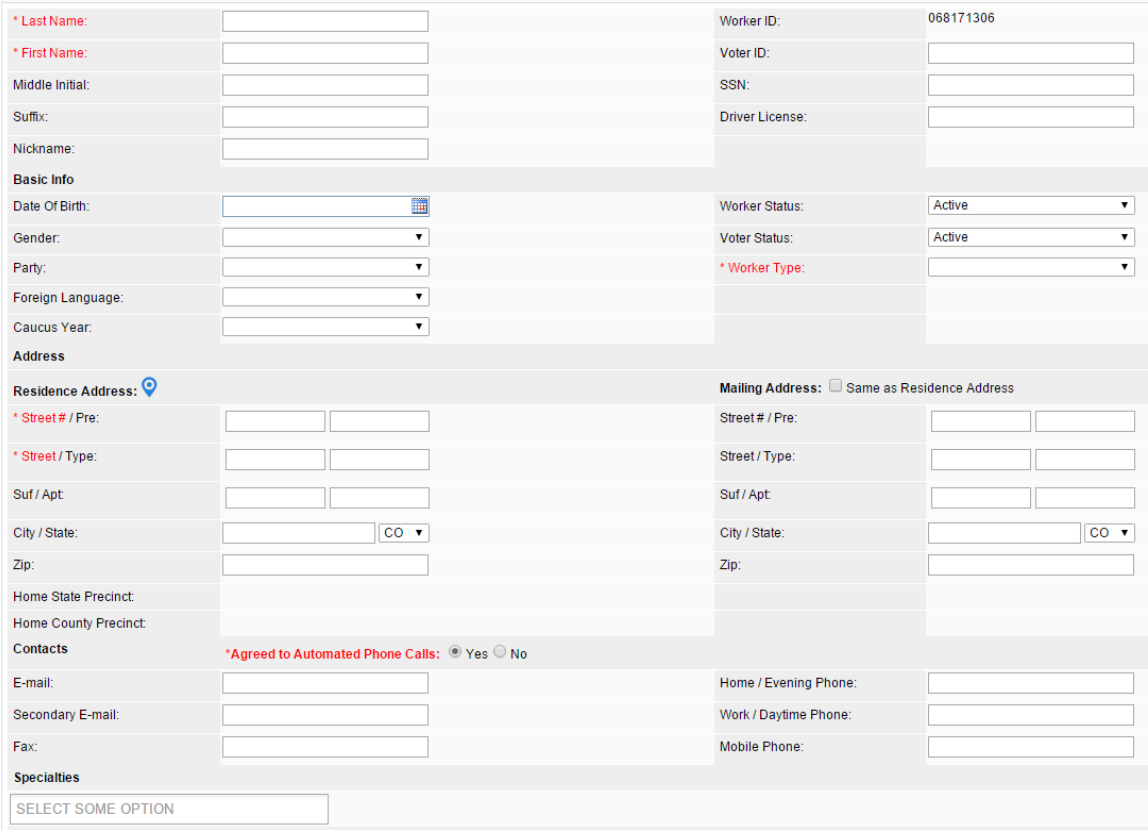
Poll Worker tab Overview

Adding a new worker

1. In the poll worker tab, click 'add new'.



2. All the fields in red are required to be filled out in order to save.
    a. Some important fields to fill out are:
        i. Caucus – defining a date in the caucus field will characterize the worker as a caucus worker. this will put the 'c' icon next to their name.
        ii. Worker type – choose the type of worker the person is. Choosing student will put the 'S' icon next to their name.
        iii. Agreed to Automatic Phone Calls – will allow the system to call them



3. Clicking 'save' will activate the 'assignment' dropdown.

4. The assignment tab in the profile will allow you to define the background check and the worker's Election Day work assignment.

Training Overview

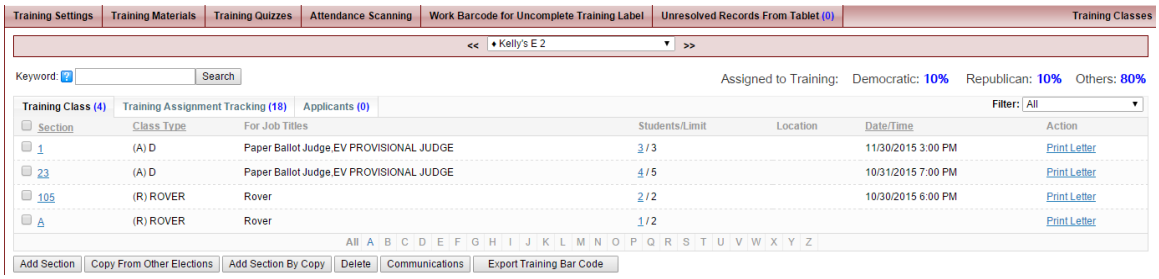
The **Training** section is where you can review training classes along with who has been assigned to a specific class.

In the **Training** section you can:

- Create new class types
- Review the buildings used as training locations
- Review and create instructors
- Scan in poll worker attendance
- Add new class sections
- Review class section rosters
- Use the communication section to communicate with a class
- Mark a poll workers attendance as attended
- Mark if a poll worker completed the class or not
- Remove workers from a class or reassign them to another section
- File a complaint against a worker

View and training tab

1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. The columns are clickable to help you review the training class information.
3. Use the **Search** box to find a class name, section or date.
4. Click on the **Section** title to review more information about the specific section.
5. Click on the **Student** number to review the list of poll workers assigned to that class. Note: poll workers can be assigned to numerous training classes so their name may appear in many different class rosters.
6. Change the Per Page number to review more or less classes on the screen.
7. Use the alphabetical letter line to find different sections.

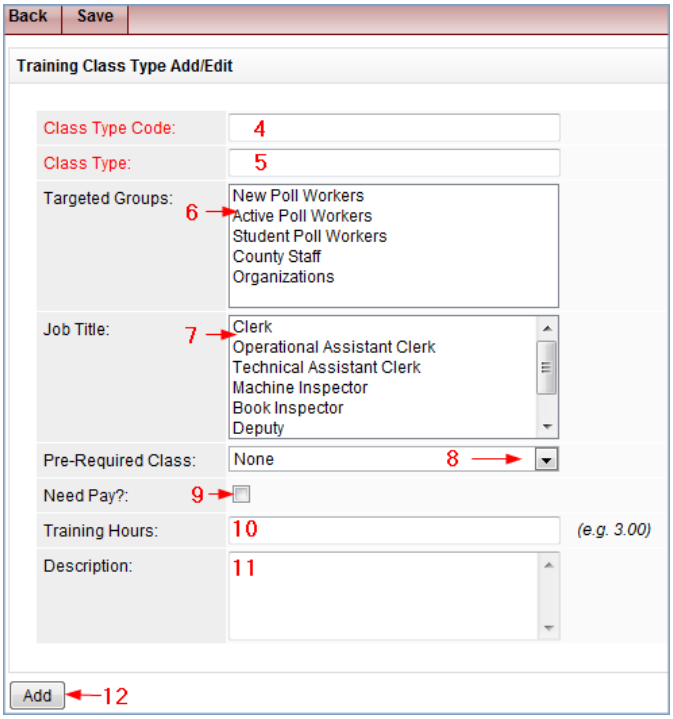


Create / Edit class types

Class Types allow you to define the different training classes needed for an election. You can create different class types and define the types of poll workers you want to be assigned to a class; For example experienced workers, new workers, workers with a

specific job title, etc. Once a class type is created, you can go ahead and create sections for the type. To create / edit a class type:

1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. Click on the **Training Settings** button.
3. In the new screen you will see multiple tabs. The first one that will be open is the **Class Type** tab. Click on the **Add** button to create a new type.
4. Type in a **Class Code.**
5. Type in a **Class Type.** The class code and class type will be combined to create the final Class Type.
6. Select a **Targeted Group** by clicking on one listed. To select multiple, hold down the Shift or Ctrl button. This will allow you to select more than one group.
7. Selected the **Targeted Job Title**(s). To select multiple, hold down the Shift or Ctrl button.
8. Select an option out of the **Pre-Required Class** box. By selecting an option, you can keep track of targeting the right group of workers. For example if you set a pre-requisite to be the basic class → that means the only workers that will be able to attend the class would be those who already completed the basic class.
9. Check the **Need Pay** box if you want to document that the workers will receive a pay amount for attending this class type. By checking this box, automatically payment fields will appear for you to fill out.
10. Document how many **Training Hours** are required.
11. Leave a note in the **Description** box about the type if needed.
12. Click **Save** once finished.



Delete a class type

1. Click on the **Training** tab in the menu bar. The training classes will be displayed.

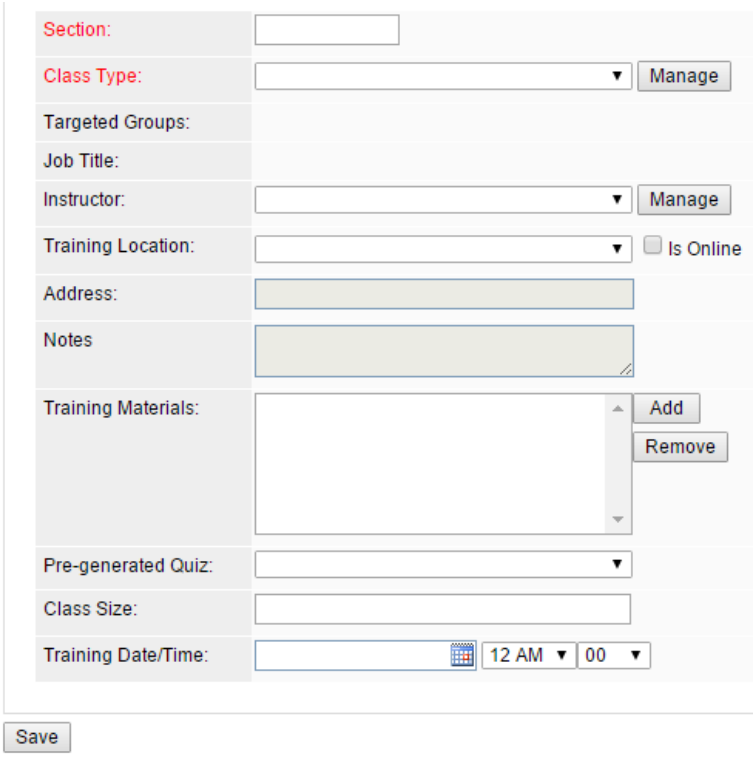
2. Click on the **Training Settings** button.
3. Check the box next to the class type(s) desired.
4. Click **Delete.** Note that class types that have sections created for it can't be deleted.

Add/Edit a section

1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. Click on a **Section** to edit or click **Add Section** to create a new one.
3. In the new screen you can review the section detail.
4. Modify the **Section** title.
5. Modify the **Class Type** by selecting one from the dropdown. If you click the button manage, it'll take you to the different class types to let you modify the target groups and job titles.

5.2 The class type selected will show you the targeted groups and which job titles.

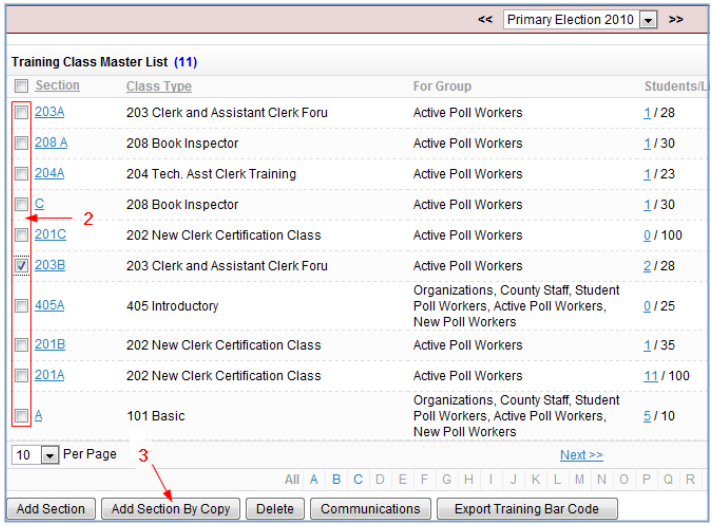
6. Select or modify the **Instructor** for the class by selecting a name from the dropdown. If you click the button manage, it'll take you to the list of instructors and let you review each one.
7. Modify or select a **Training Location** from the dropdown. The training locations come from a list that is setup within PLMS. With a selected training location, the address will fill in automatically.
8. Set the **Class Limit** for the section. This will let you know how many people to place in a class.
9. Set or modify the **Date** and **Time** the class will be held.
10. Once finished, click **Save.**

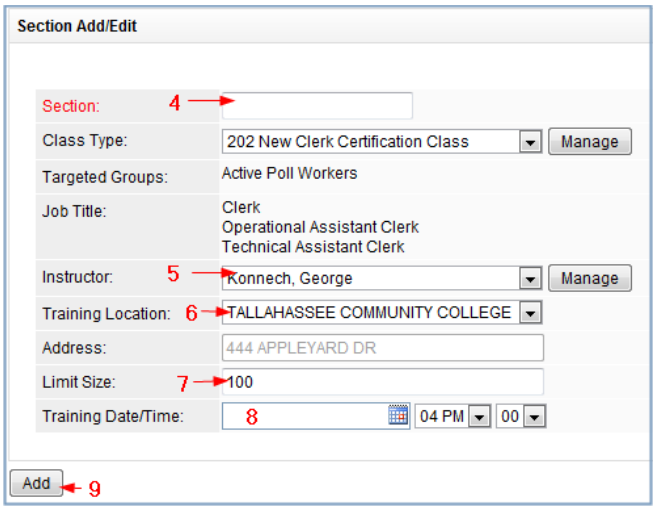


Add a section using the copy feature

You can create a new section without having to fill in all the fields by using out Copy feature. Lots of times a class type needs to have multiple sections to allow poll workers to have a variety of classes to choose from. This feature will allow you to copy an already created section and let you put in the new date/time.

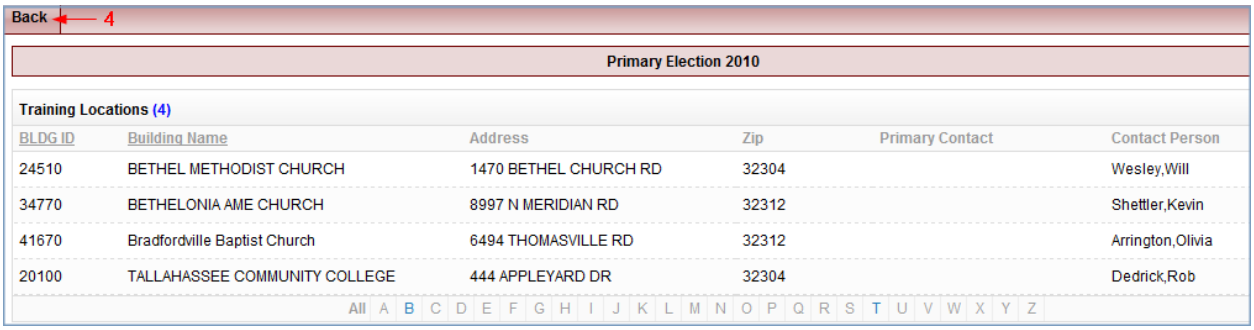
1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. Click the box next to the section you want to copy.
3. At the bottom of the screen, click the button **Add Section By Copy**.
4. In the new screen, fill in the **Section** number
5. Modify the **Instructor** if needed
6. Modify the **Training Location** if needed
7. Modify the **Limit Size** if needed
8. Set the **Date / Time**
9. Click **Add** when finished.





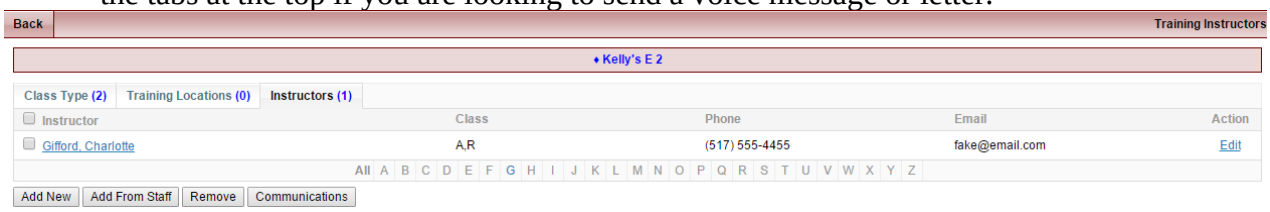
Review the training locations

1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. Click on the **Training Settings** button at the top of the screen.
3. Next to the **Class Type** tab, click on the **Training Locations** tab.
4. Review the locations set to be used for training classes.
5. Click the **Back** button to return to the training section.



Review, add and edit training instructors

1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. Click on the **Training Settings** button at the top of the screen.
3. Next to the **Training Locations** tab, click on the **Instructors** tab
4. The instructor list is made up of staffers or others that are able to teach the classes. You can review their names, the classes they are assigned to teach, their phone number and email address.
5. Click **Edit** across from a person's name to modify their information.
6. To add a new instructor, click the **Add New** button. Fill out the fields required and click save.
7. To add an instructor from the PWMS Staff list, click **Add From Staff.** A popup will appear with all the workers saved as a staff member.
8. To communicate with the instructors, check all the boxes or the desired individuals and click **Communication.**
9. Automatically the email section will appear with the selected instructors. Click the tabs at the top if you are looking to send a voice message or letter.

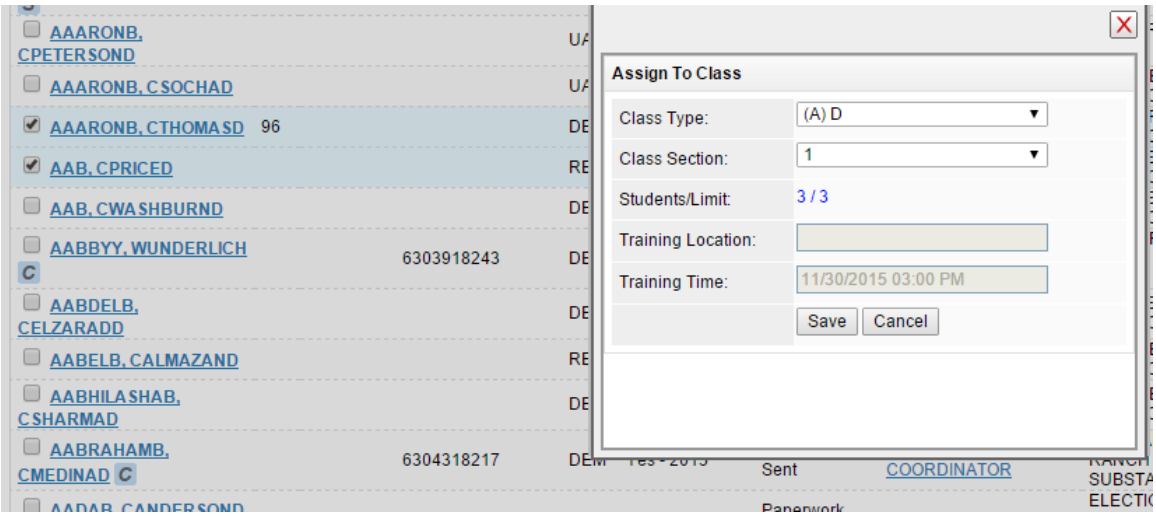


Assign poll workers to training classes

Poll workers can be assigned to training classes within the **Assigned tab**. Poll workers are assigned a specific job title and have certain classes they must take in order to work on Election Day. PollChief will help the users assign the poll workers to the specific classes they are required to take.

1. Click on **Assigned** in the menu bar. The list of all the assigned poll workers will be displayed.
2. The Training Class column shows which classes poll workers are assigned to. Click on this column title to sort the list. For example clicking on the column title twice will show you which poll workers are not assigned to a class yet.
3. Check the boxes next the name of the poll workers desired.
4. Click on the **Assigned To Training** button at the bottom of the page.

5. A popup window will appear requesting you to select a class type and section. The location and time will change as you select your class.
6. Once finished click **Save**.



7. The new class number that you just assigned to the worker will appear in the training column next to their name.
8. If you click edit across from the worker, you can review the **Training History** tab to see if they have completed any of the required training classes yet.

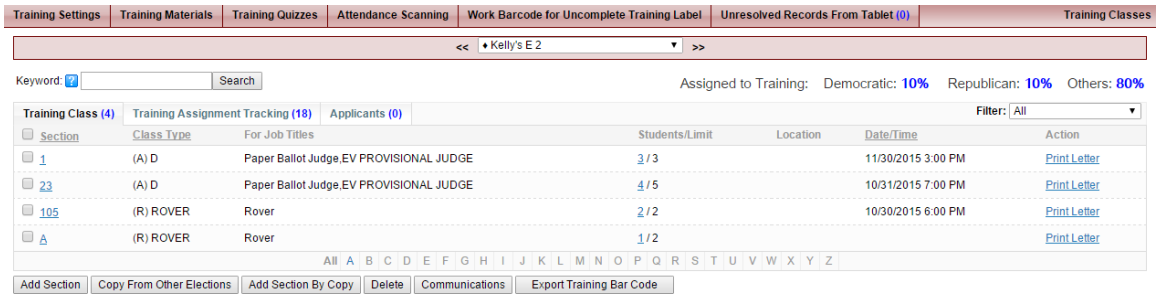
Review the training class rosters

Within the **Training** tab, you can review any of the training class rosters. Within the roster, you can:

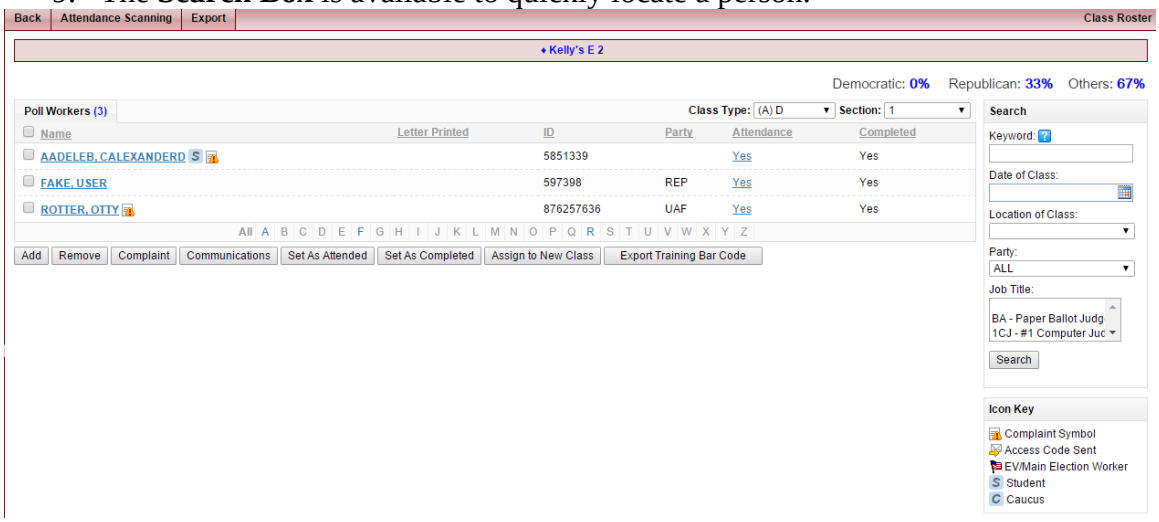
- Review who has attended the class
- Scan attendance in using the poll worker's training bar code
    - Or you can manually change a poll worker's attendance
- Set poll worker attendance as completed
- Communicate with a specific class
- Assign poll workers to another training course
- Remove workers from a class
- Add specific workers to a class

View a class roster

1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. To review the class roster, click on the **Student** number.



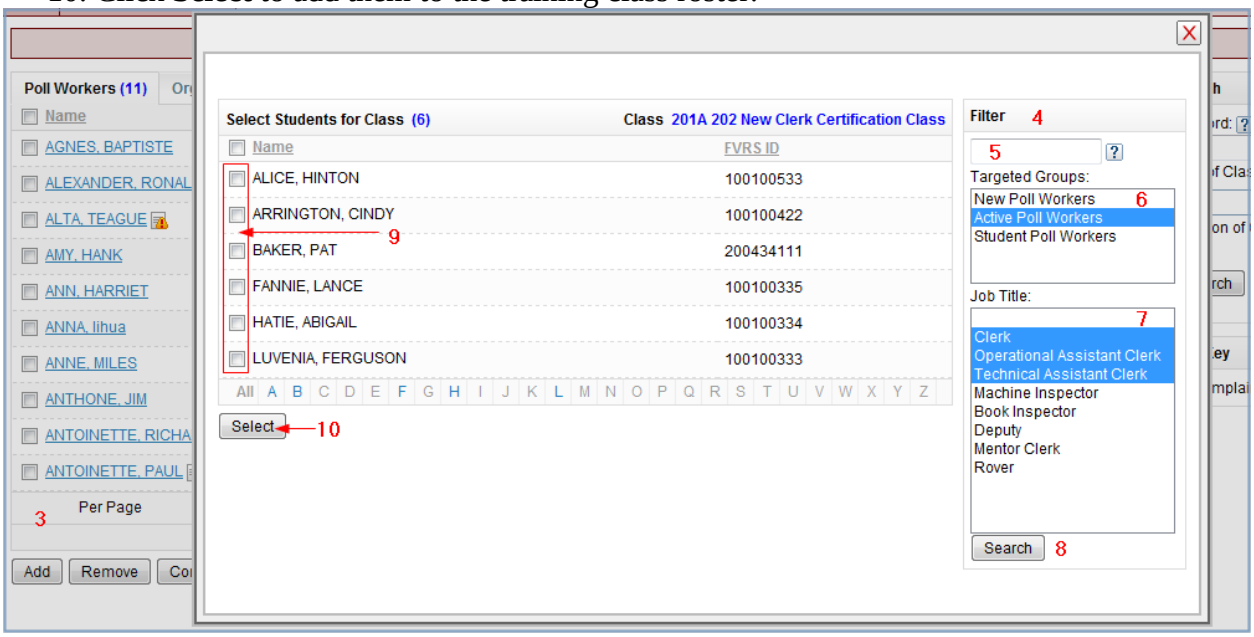
3. The new screen will open by default to the list of poll worker students assigned to this class.
4. There are two different tabs at the top. The **Poll Worker tab** shows the workers who are assigned to this tab and the **System Staff tab** would show the list of workers assigned to this class.
5. The columns are setup to give you a quick idea as to what has happened so far for this class. The communication column would notify you if the worker has been sent a letter, email or phone call.
6. The attendance column shows you if the poll worker has had their attendance taken for them yet.
7. The completed column shows if they have been marked as completed yet.
8. If you want to review another class – use the filter at the top to select a different class type and/or section.
9. The **Search Box** is available to quickly locate a person.



Add poll workers to the class roster

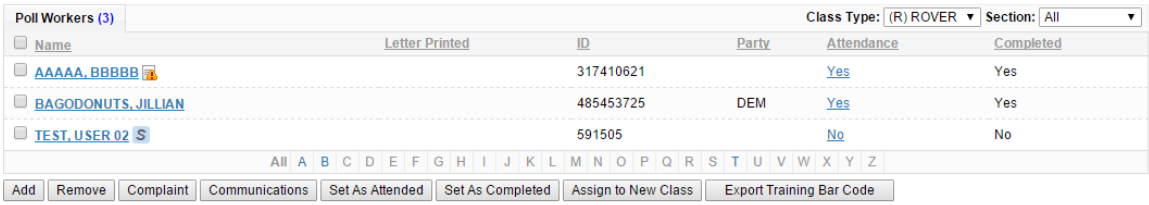
1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. To review the class roster, click on the **Student** number.
3. Within the class roster screen, click the **Add** button.
4. In the popup window, there is a detailed **Filter** box to allow you to find desired poll workers.
5. Use the **Search** box to type in a specific individuals FVRS ID number or their name.

6. Select one **Target Group** type by clicking on the desired group.
7. Select one or multiple **Job Titles**. To select one, just click on the desired job title. To select multiple, while holding down the control button on your keyboard, click on the desired job titles. The ones you clicked on should highlight in blue. To unselect a job title, hold down the control button and click on the title you don't want selected.
8. Click **Search** once you finished your Filter.
9. After you ran the filter search, check the boxes next to the desired poll workers.
10. Click **Select** to add them to the training class roster.



Remove a worker from a class roster

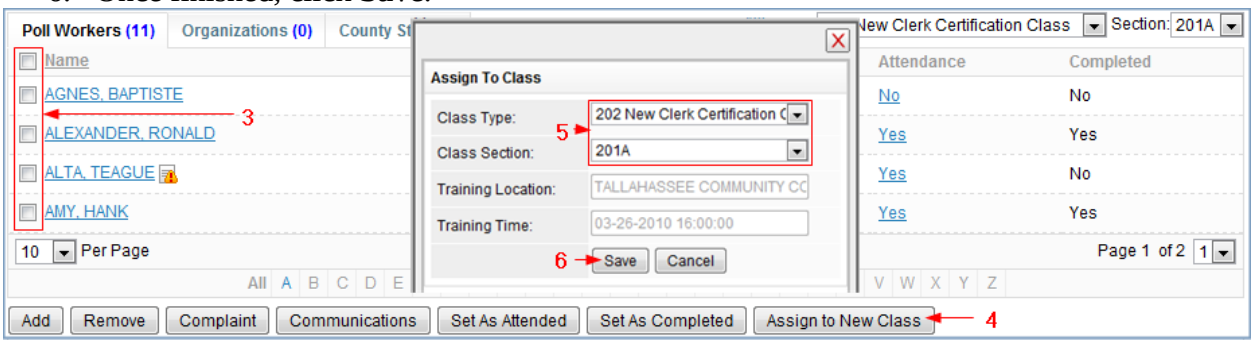
1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. To review the class roster, click on the **Student** number.
3. Check the boxes next to the desired poll workers name.
4. Click **Remove**. This will take them off of the training class roster. Another way to remove a worker from a class roster is by assigning them to a different class. View the next section to see how to do so.



Remove a worker from a class roster

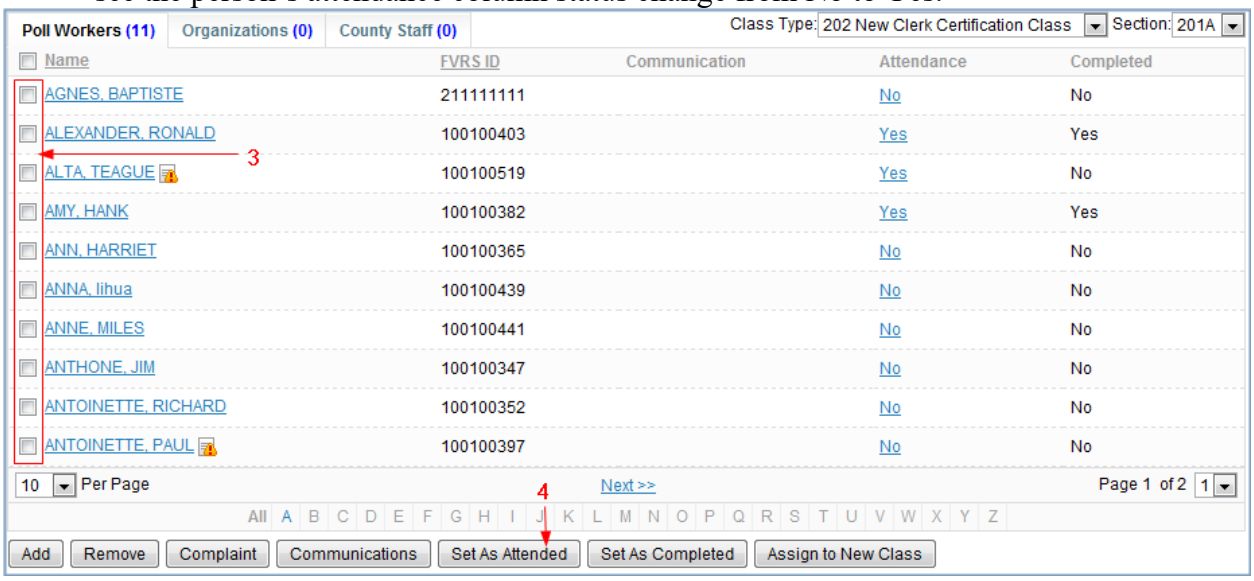
1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. To review the class roster, click on the **Student** number.

3. Check the boxes next to the poll workers you wish to assign to a different training class.
4. Click the **Assign to New Class** button. A popup will appear asking you if you are sure you want to assign the worker to a new class. Click OK to continue or Cancel to return to the roster page.
5. A little popup will appear to allow you to select the proper **Class Type** and **Class Section**. The training location and time will fill in with what you selected as the type and section.
6. Once finished, click **Save**.



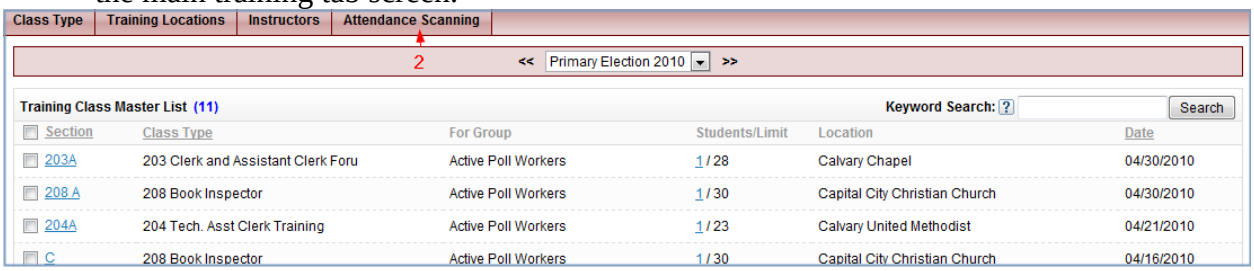
Mark a poll worker attendance as attended manually

1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. To review the class roster, click on the **Student** number.
3. Click the box next to the desired poll worker(s) name you want to mark their attendance to Attended or Yes.
4. Click the button titled **Set As Attended.**
5. A popup will appear to ask you one more time if you are sure you want to change the attendance. Click OK to continue or Cancel to return. Once finished, you will see the person's attendance column status change from No to Yes.

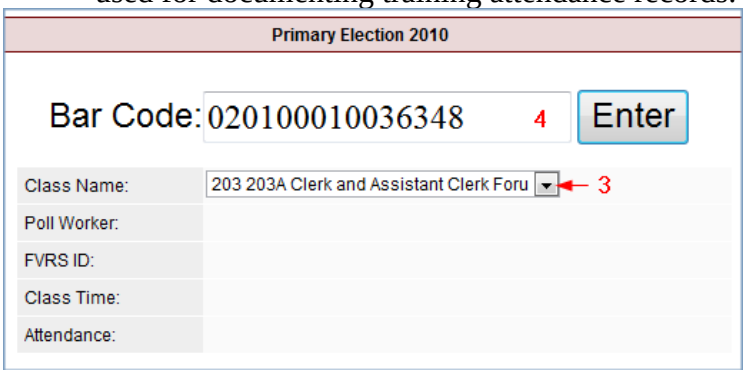


Scan in training attendance

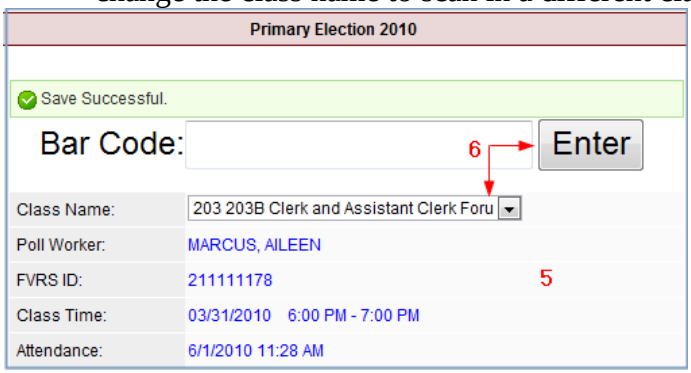
1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. To scan in attendance, you can click on the **Attendance Scanning** button from the main training tab screen.



3. In the new window there is a dropdown window to allow you to select which class you are scanning attendance in for.
4. In the Bar Code field, enter or scan in the training bar code number of a poll worker and click enter on your keyboard or click enter on your screen. Note: poll workers have two different bar codes assigned to them. The training bar code is used for documenting training attendance records.



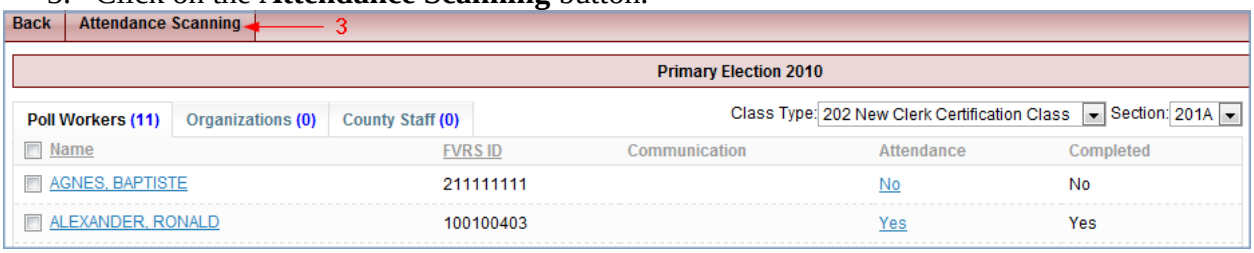
5. The bar code entered will pull up that poll worker's information for you to review it.
6. Enter the next bar code to document the next worker's attendance training or change the class name to scan in a different class.



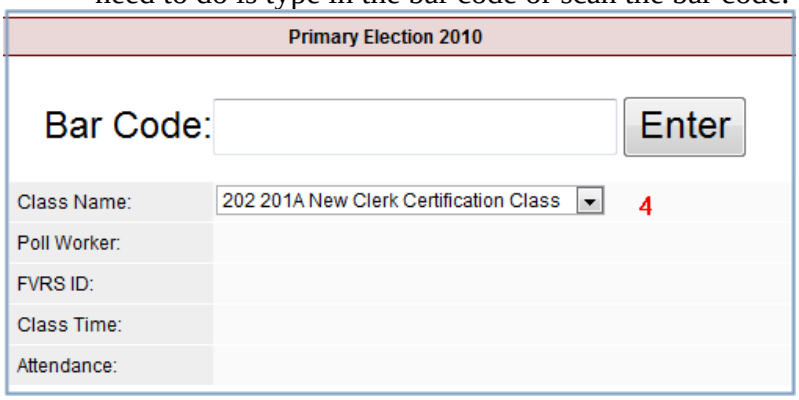
Scan in training attendance for a specific class roster

You can skip the step of selecting a class name from the dropdown menu if you already are within the class roster screen.

1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. To review the class roster, click on the **Student** number.
3. Click on the **Attendance Scanning** button.

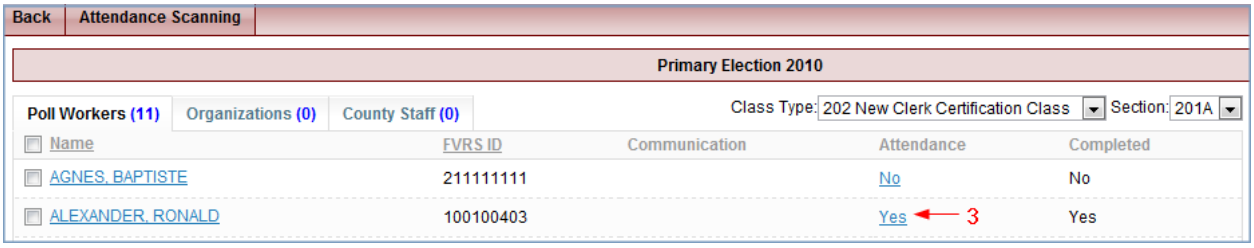


4. In the new screen, you will see the **Class Name** is already setup for you. All you need to do is type in the bar code or scan the bar code.



Review scanned attendance

1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. To review the class roster, click on the **Student** number.
3. To look at attendance for a specific worker, click on the No or Yes under the **Attendance** column for the worker.

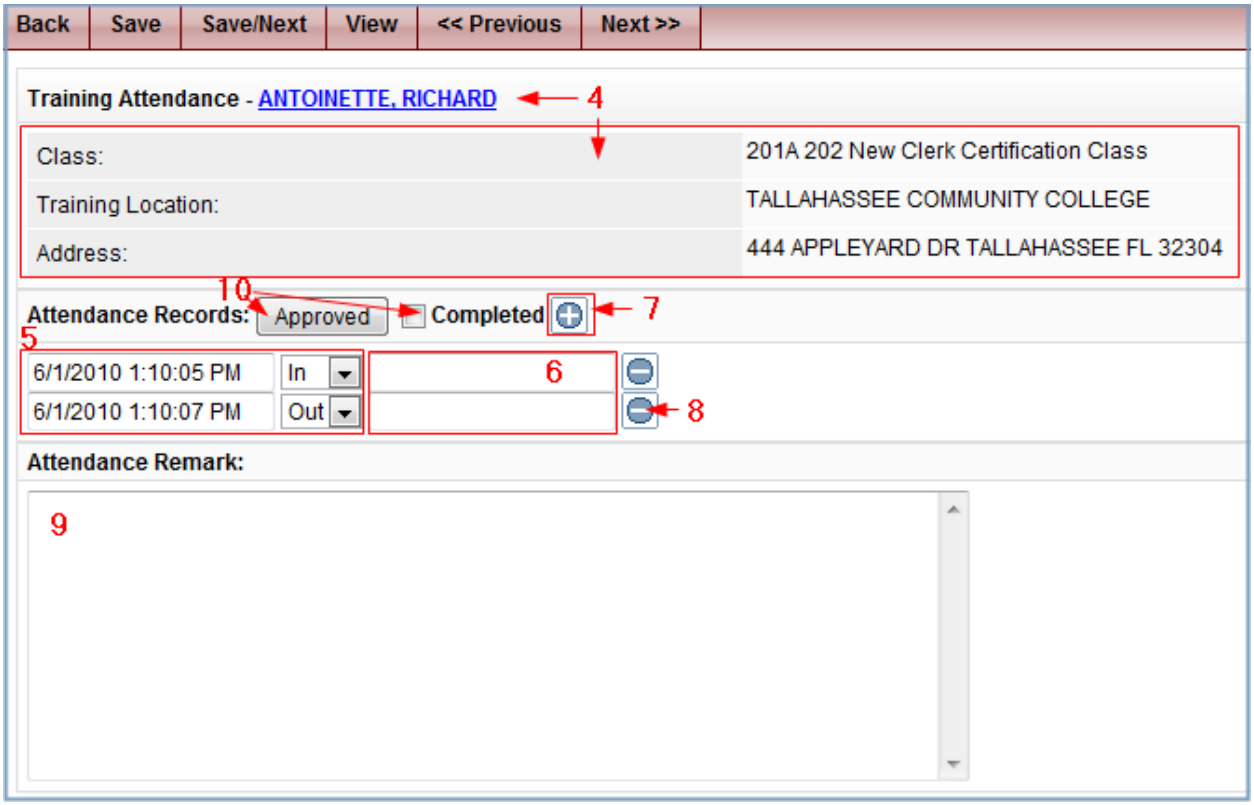


4. In the next screen, you will see the poll worker's name and the class information that they are assigned to.
5. If you clicked on the attendance of someone that had their attendance scanned in, you will be able to review the different scan in and out times.
   a. If you clicked on the attendance status that was Yes and there are no scan in or out times listed, it is because this persons attendance was taken manually by pressing the

button titled **Set as Attended**. Below you can review how to add scanned in times if needed.

b. If you clicked on the attendance status that was No, there will be no scan in or out times.

6. The box to the right of the in and out times is for you to put a note in. You can document for example; 'late 15 minutes' for the in time or 'left early' for the out time.
7. To add another in or out time, click on the **plus sign**. Automatically a new slot will appear where you can input the in or out status as well as a note.
8. To remove a time, click the **negative sign** next to the desired time to remove.
9. The **Attendance Remark** box is available for you to input notes if needed.
10. The **Approved** and **Completed** button will change the poll workers completed status from No to Yes. Click either one to change the worker's completed status to Yes.
    a. Note: if the completed box is already checked, that means the status is already marked as Yes. If you uncheck the completed box, it'll notify you that you are going to change the status.

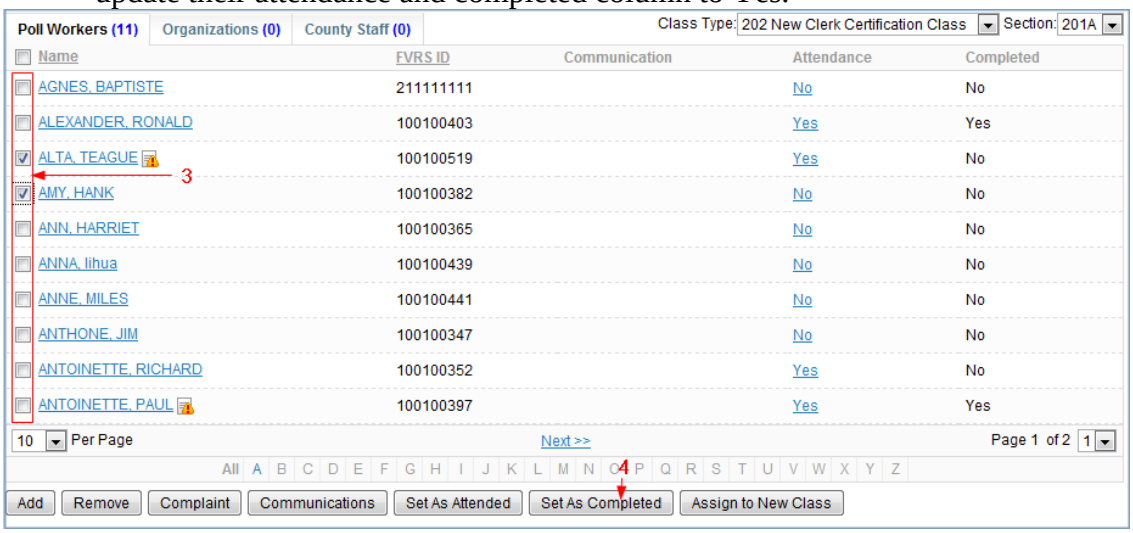


Change the completed status

By changing a poll workers status to completed, it'll show up in their Training History tab as completed. This is how workers get full credit for the class.

1. Click on the **Training** tab in the menu bar. The training classes will be displayed.
2. To review the class roster, click on the **Student** number.
3. In the new screen, select the boxes next to the poll workers you desire to modify their completed status.

4. Click the button at the bottom that says **Set as Completed**. Note: this will update any poll worker's status. Whether they have attendance documented or not, it'll update their attendance and completed column to Yes.



Training assignment Tracking

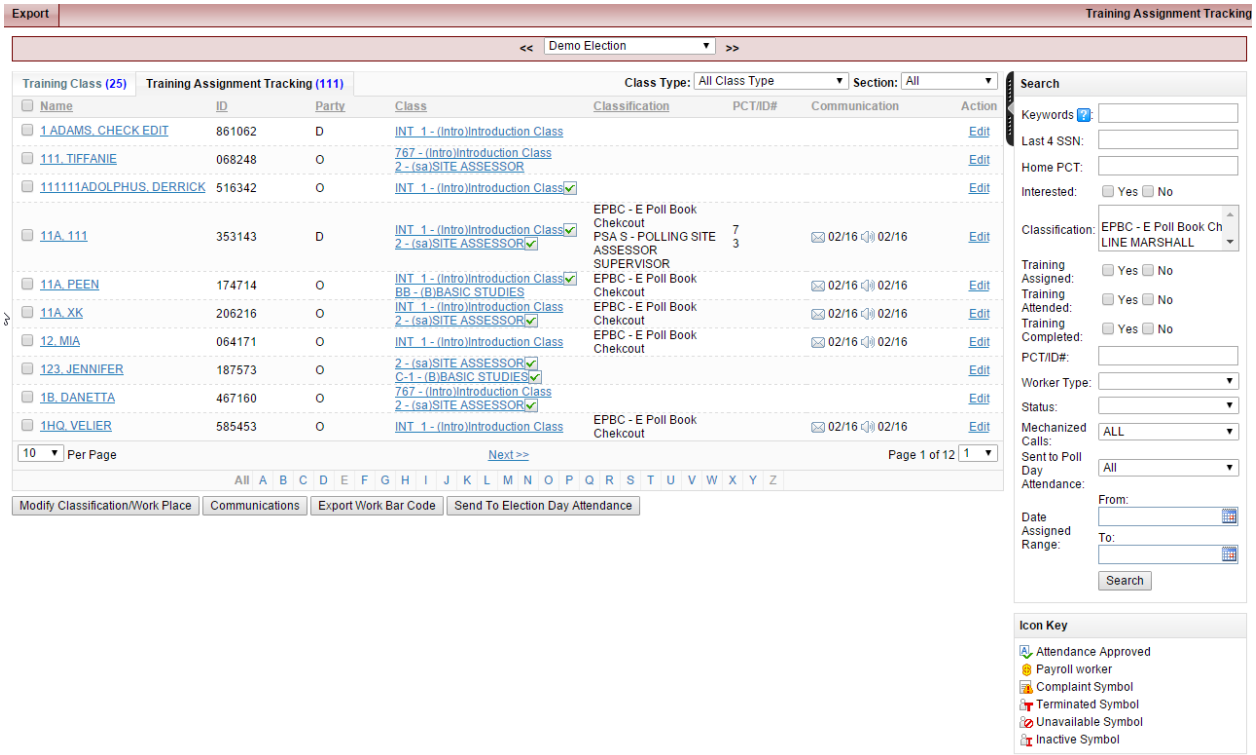
Overview

The **Assignment Training** tab within the **Training** tab shows you everyone currently linked to this current election; linked normally either by having a work assignment or a training assignment. Within this tab you can:

- Review poll workers who may have a training assignment but no work assignment.
- Review poll workers who may have a work assignment but no training assignment.
- Send workers to Election Day attendance.
- Edit any workers training assignment, work assignment, or status.

Review the Training Assignment Tracking tab

1. The main part of the screen shows the workers, along with their ID, Party, Class they've been assigned to, Classification/Job Title, Precinct/ID #, and communication log.
2. The button of the screen has many buttons similar to what the user has already seen. The communication and the export bar code buttons work identically as they do in other tabs/modules.
3. The Modify Classification/Work Place button is a quick and easy way to change a workers work assignment without having to leave the training module. Simply select the worker you'd like to modify and click on that button.
4. Send to Election Day Attendance button will send the selected worker to the **Election Day Attendance** tab. That is covered in the next chapter.
5. The most important feature of this tab is the search box on the right hand side. The user is able to search workers to find out who is missing a class, an assignment, who has attended but not completed training, etc. Almost every combination of training and work scenarios are searchable from this screen.



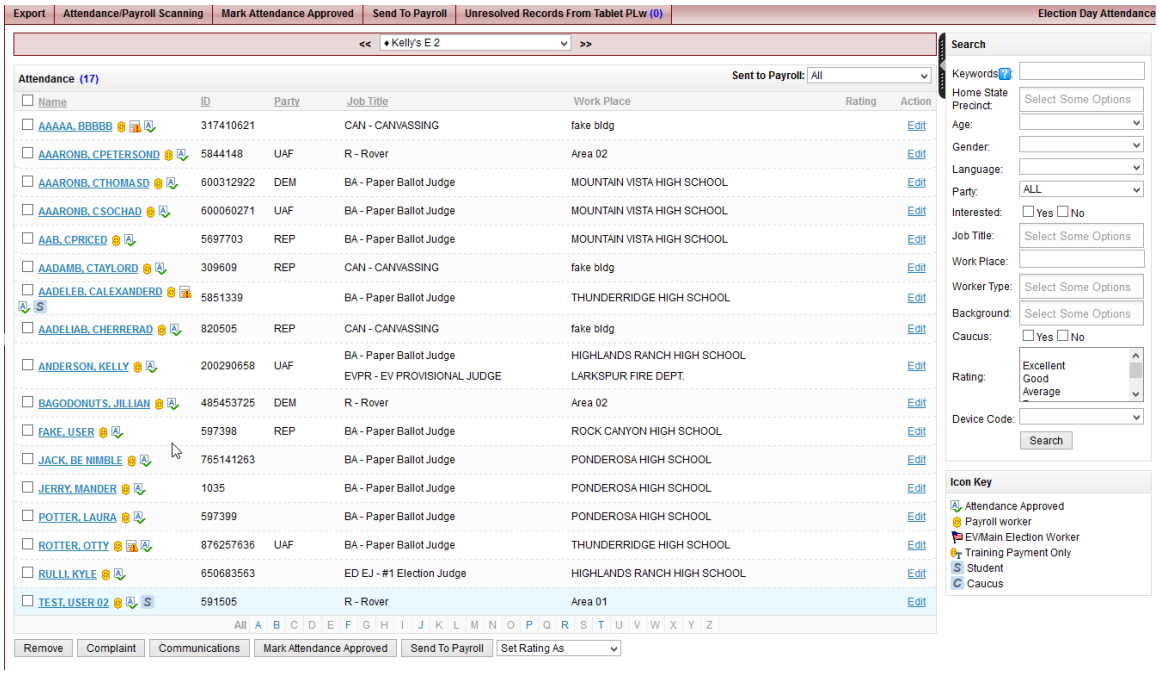
Election Day Attendance

In the **Election Day Attendance** section, you can view all the Election Day scanned attendance records for different poll workers. This also can be a list of workers that got moved over from the training tab manually. The poll day attendance tab is available to help the user build the payroll. You can verify attendance and document notes if needed.

In the **Election Attendance** section you can:

- View and edit poll worker poll day attendance records
- Remove poll workers from the poll day attendance tab
- Send poll workers to the payroll section
- Communicate with poll workers
- Add complaint information to poll workers
- Set poll worker performance ratings
- Scan in poll day attendance for poll workers
- Search for certain poll workers poll day attendance

Click the **Election Day Attendance** task menu bar in the task menu section. The Work Attendance page will appear. Officials who have been scanned in or have been sent manually from the Training Assignment tab will be listed.



Attendance Scanning

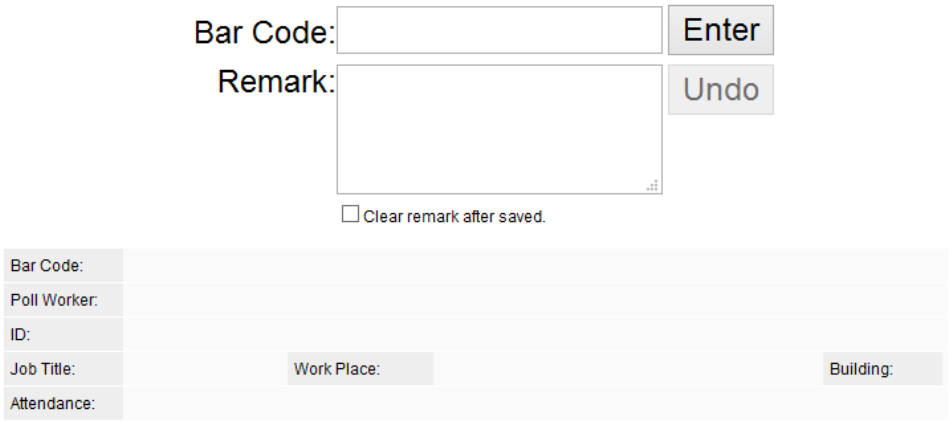
There is an Attendance Scanning button available at the top of the Election Attendance page. <u>If desired</u>, you can have assigned workers can scan their work bar codes when they come in to work and when they leave work. The system will mark the attendance automatically. The first scanning will be marked as In, the next scanning will be Out.

For attendance scanning, you don't have to scan a bar code twice or as they walk in or out of the election building. One bar code scan is enough to move a worker from the Completed tab of the training task. The bar code scanning is a tool which can speed up the process of documenting who actually worked the election.

Click the **Attendance Scanning** button at the top of the page. The Work Attendance Scan page will appear.

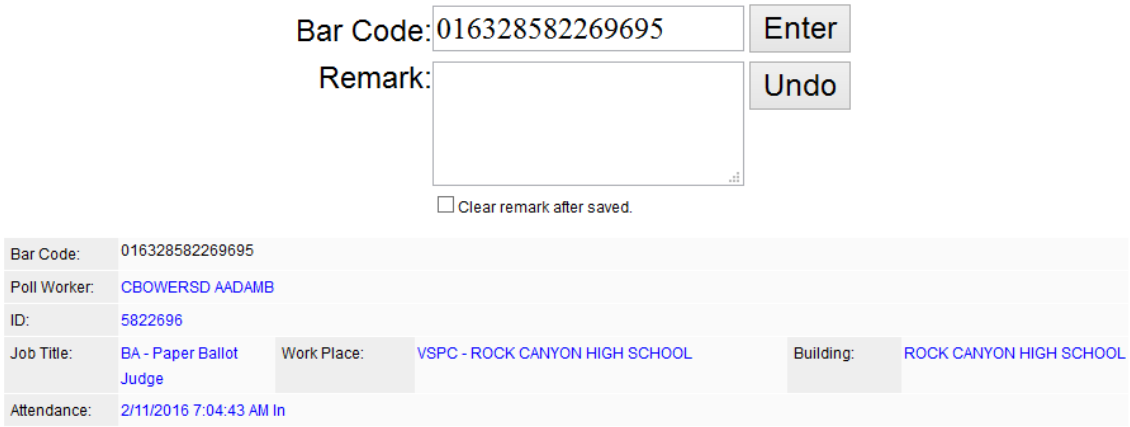
Scan or type the work bar code of a official into the Bar Code box then click the **Enter** button.

The worker's name, ID, assigned position, assigned working place, and working building will populate in the fields.



While scanning in attendance, you can leave an attendance note with the record. The 'Remark' box can be used to type in a note that will be attached with the time stamp.

Below the Remark box is a check box. If the box is checked, the remark that is typed for the person for whom you are about to scan attendance will be cleared. If unchecked, whatever you typed into the Remark box will be submitted with each subsequent scanning of a bar code.

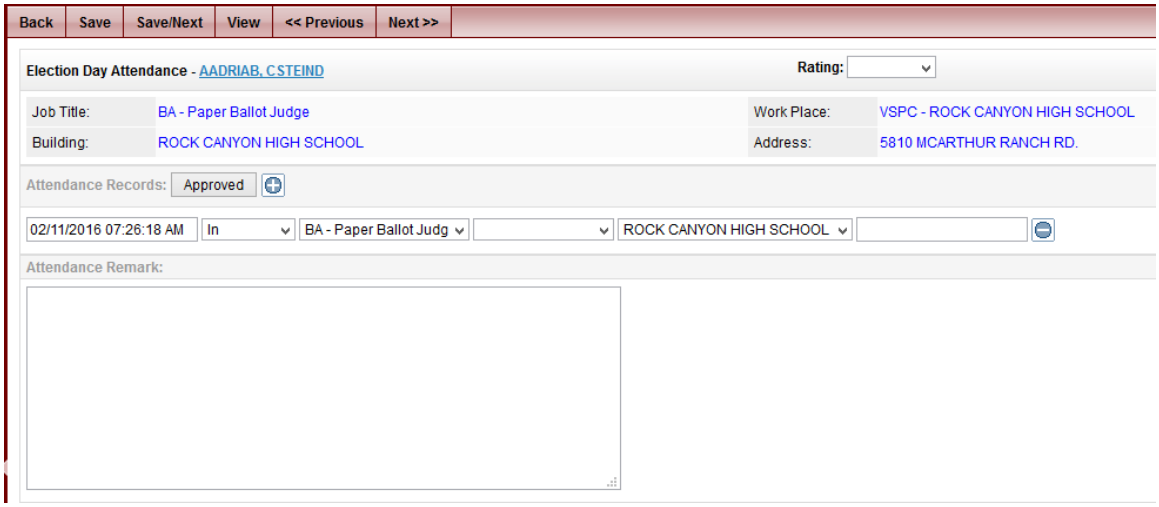


Once a bar code is scanned, you can 'undo' the scan. Once the screen says 'Saved Successfully', you can click the **Undo** button to remove the attendance.

Edit Worker Attendance

On the Work Attendance page, click a worker's name link to view the attendance record of the official or to click the Edit link to make changes to the attendance record.

Every check-in or check-out scanning of the worker is listed under the Attendance Records.



On the Work Attendance Edit page

- Click on the **+** sign to add an attendance record for the official or Click on the **-** sign across from an attendance record to remove it.
- For the time stamps that have a note within the last field – this is the comment that was left for the worker when their bar code was scanned in at that time.
- Select a rating for the official's performance from the Rating drop down box.
- Click the **Approved** button. The attendance records of the official will be approved and grayed out. The approved official will be listed in Payroll.
- You can document an attendance remark within the box or leave an attendance note with a specific time stamp within the text field box.
    - If you leave an attendance remark or a note with a time stamp, these will be visible within the payroll feature.
    - The attendance remark will also be visible within the worker's work history tab within their profile.

Click the **Save** button or **Save/Next** button to update the information

Remove Officials from Work Attendance

- On the Election Day Attendance page, check the boxes of the workers that you are going to remove from Election Day Attendance.
- Click the **Remove** button then click the **OK** button to confirm.

The workers will be removed from Election Day Attendance. Their work assignment will not be removed from their profile; they are just taken off this task within the menu bar.

workers who have had their attendance approved or have already been sent to payroll cannot be removed.

Approve an Worker's Attendance

You can approve a worker's attendance in the Election Day Attendance Edit page. You can also use the **Mark Attendance Approved** button on the Work Attendance page to approve multiple officials at a time.

- Click the Election Day Attendance task menu bar to get to the Election Day Attendance page.
- Check the boxes of the workers whose attendance you want to mark approved.
- Click the **Mark Attendance Approved** button.
- In the pop up window, click the **OK** button to confirm.

The attendance records for the selected workers will be approved and an approved icon will appear next to each approved official ( ).

***IMPORTANT NOTE: If a worker is sent to the Election Day Attendance tab by being scanned, their attendance is automatically approved and they will also appear in the Payroll tab. If a worker is sent manually to the Election Day Attendance tab by way of the Training Assignment Tracking tab, then their attendance must be approved.*

Send Workers to Payroll

People who have worked in the election need to be sent to Payroll to get their payment processed.

- On the Election Day Attendance page, check the boxes of the workers that you want to send to Payroll.
- Click the **Send To Payroll** button and click the **OK** button to confirm.

A payroll icon will appear next to each selected worker ( ). The selected workers will be added in Payroll and, if their attendance has not been previously approved, it will be automatically approved.

Set Performance Rating for Officials

In the Election Day Attendance page, check the boxes of the workers for whom you are going to set a rating.

Select a rating in the **Set Work Performance As** drop down box. The selected officials will receive the rating for their performance that will appear in the Rating column.

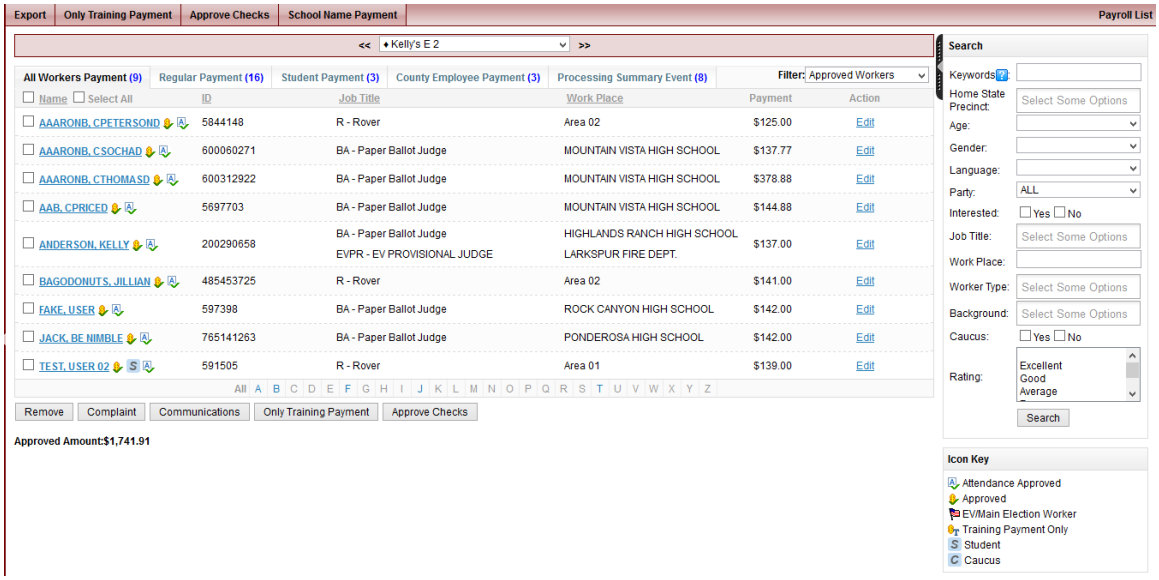
Generate the Work Performance Worksheet

- Set the work attendance tab up as desired. For example use the search box to only show a specific polling location or a specific work position
- Click the 'Work Performance Work Sheet' button. This will generate the list showing within the screen in a Word Document.

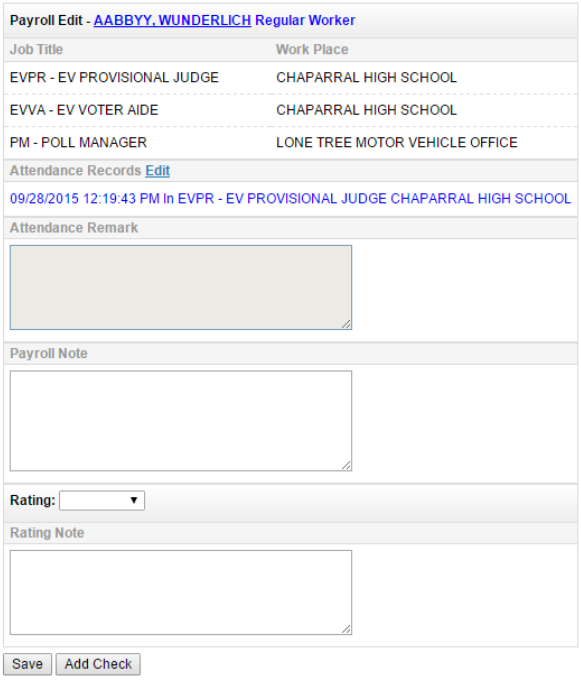
Payroll

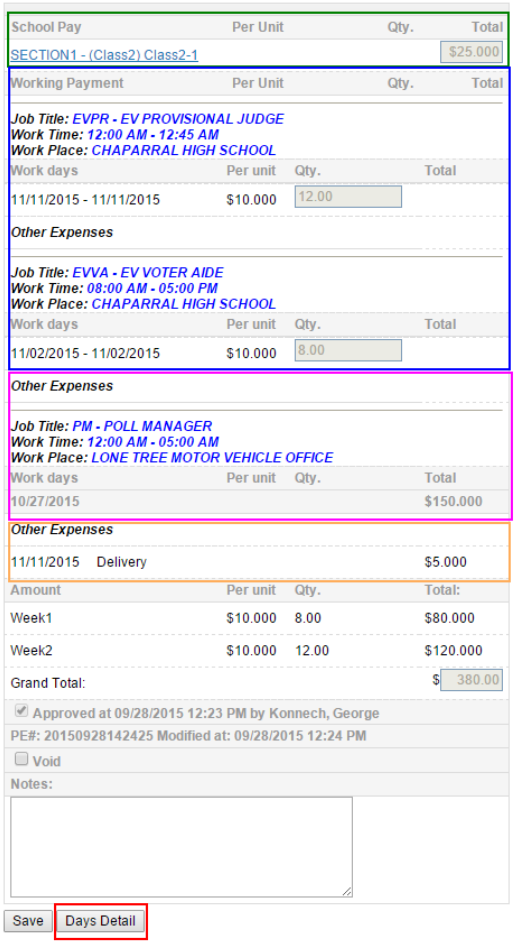
The Payroll task is the place to process officials' payment for working in the election. You can:

- View and edit the day attendance records and payment of officials
- Make adjustment for payment
- Generate payment for officials
- Void payments
- Communicate with officials and file complaints against officials
- Generate the payment report



The edit screen breaks down the pay for you. Below there is training pay (green), early voting pay (blue), Election Day pay (purple), and expense pay (orange). In red, I highlighted the Days Detail button.

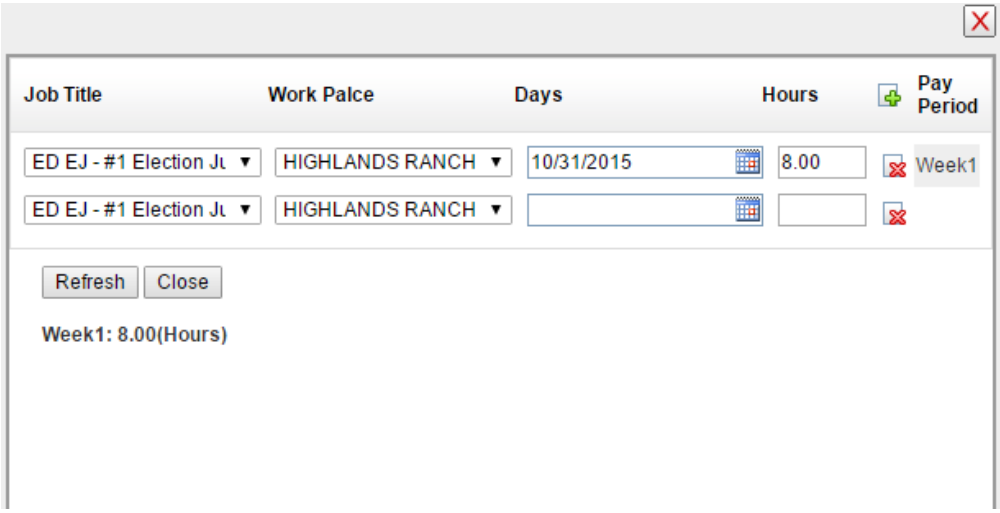




Days Detail tab

This tab allows the user to adjust the days, lcoations, and hours the worker worked during the election.

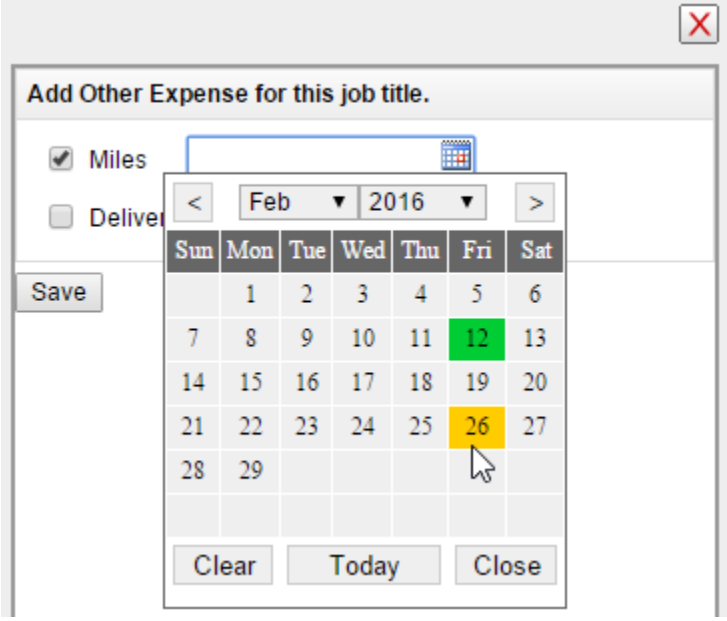
- Click on the green plus sign to add a day
- Adjust the job title, work place, date and hours
    - Note: You can only add a job title that the worker has already been assigned
- Hit refresh then close the window when complete



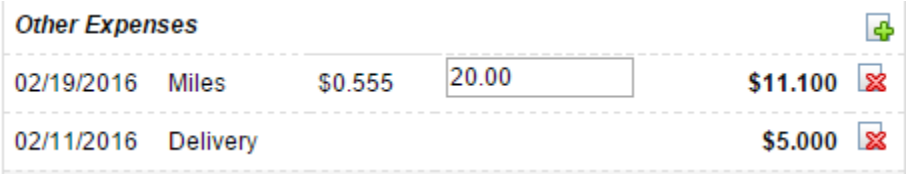
Expenses

Expenses allow the user to add additional compensation for the worker outside of their standard pay. Click on the green plus sign across from expenses in the Worker Profile in the Pay Roll tab to add expenses.

- Currently the two expenses that can be given to a worker are Delivery and Mileage.
- Check the checkbox to add the expense.
- You will need to also put in the date of the expense.
- Hit save when you are done



If the expense is reliant on another piece of data (like miles for mileage) you can enter the information on the worker screen once you close the expense window.

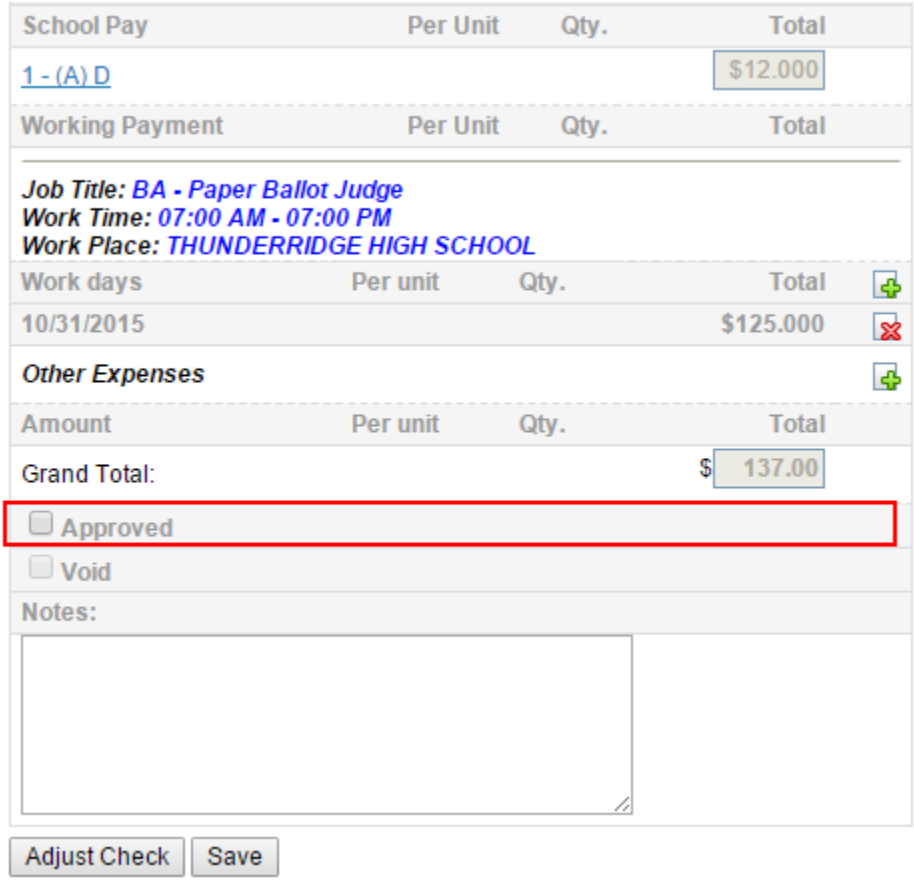


Approving workers

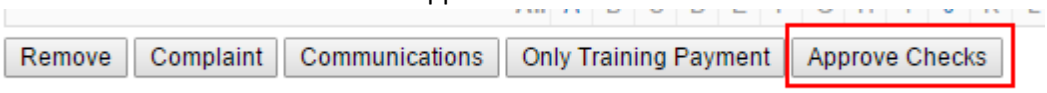
Approving a worker will allow their check to be exported when you export the Payroll file from the corresponding worker type tab. EG: Regular Worker or Student Worker.

You can approve a workers payroll two ways.

- First you can approve it from their profile in the Payroll tab. Check the box and hit Save



- Secondly you can approve a worker from the main screen of the Payroll tab. Check the box next to their name and hit the Approve Checks button

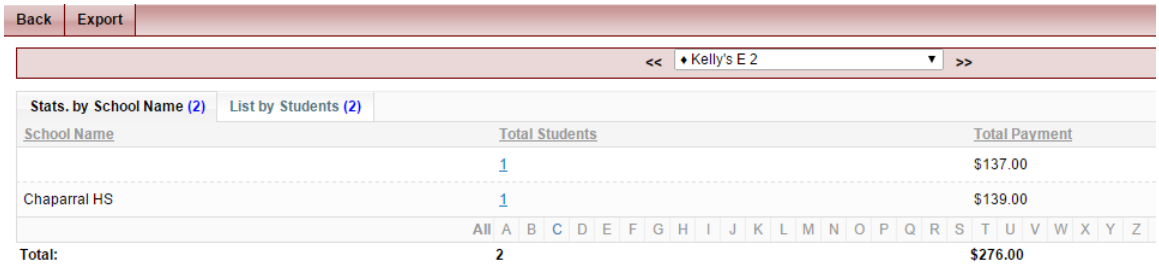


Various

There are two other buttons on the main Payroll screen: **School Name Payment** and **Only Training Payment**.

School Name Payment

This will bring you to a screen with the list of schools and how much money they get for your student workers. You can also organize the list by student by clicking on the "List by Students" tab.



Only Training Payment

This screen will list all of the works who have been pushed to payroll who only have training classes to be paid for.

Remove

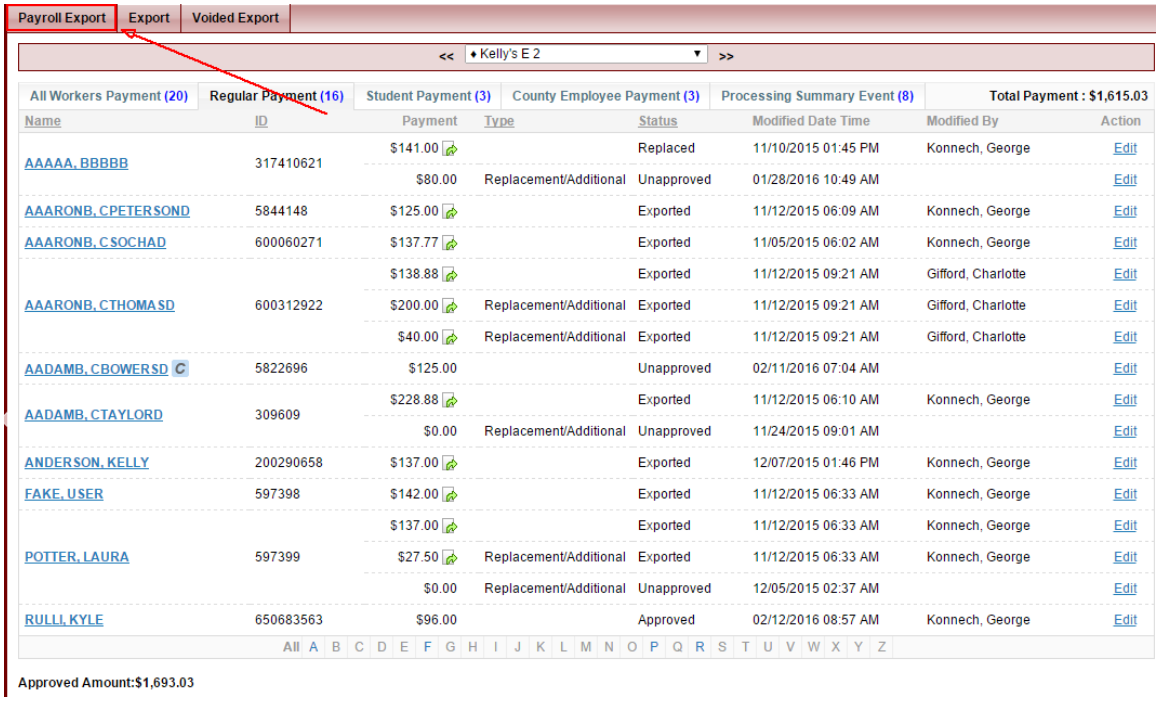
If you determine that some workers in the Payroll List should not be paid, you can remove them from the Payroll List. Workers who have their payroll status set to 'Approved' or 'Paid' cannot be removed from the Payroll. For those workers that have the 'paid' status, you can void their payment.

- On the Payroll List page, check the boxes of the workers that you are going to remove from the Payroll.
- Click the **Remove** button and click the **OK** button to confirm. The workers will be removed off the list but still remain within work attendance with their attendance documentation.

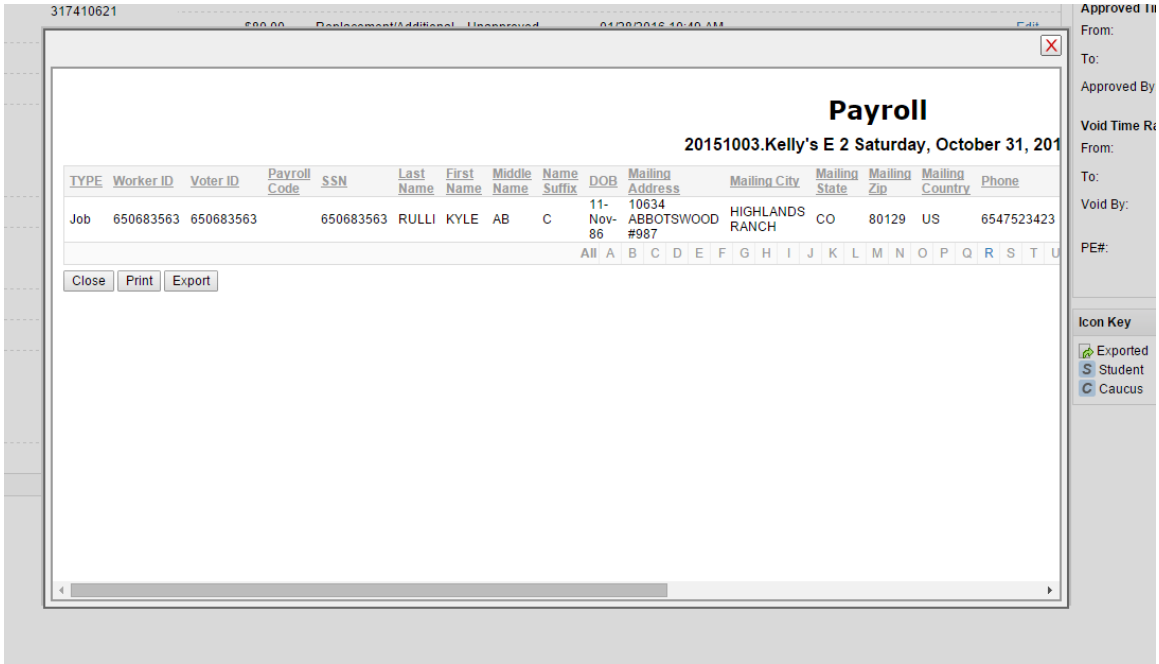
Exporting Payroll

Exporting your payroll is permanent; although you can void or alter payments, you cannot un-export a person's pay. In the Regular Payment, Student Payment, and the County Employee Payment tabs, there is a "Payroll Export" button.

The button will export everyone from that list who has been approved but not yet exported.



A preview will pop up that will allow you to preview who is about to be exported. From here you can print the list or export the payroll.

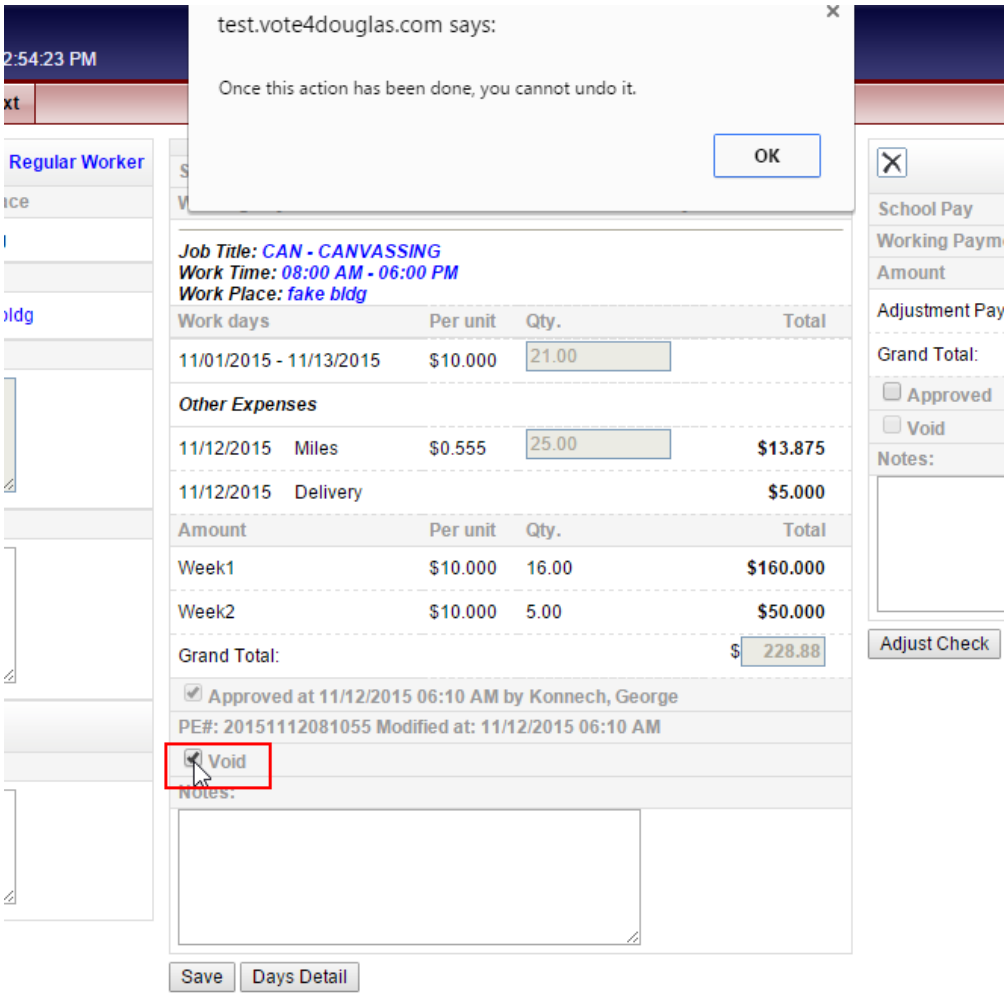


The payroll export will be downloaded as a TXT file.

Voiding a Payment

If you need a void a payment you can do so in a worker's profile in the Payroll Tab. This can only be done to workers who have already had their payroll already exported.

- Click on Edit across from their name
- Check the Void box for the check you are going to void.
- Because the Void cannot be undone, a popup will appear asking you to confirm that you want to void the payment. Click the OK button to acknowledge the message. The popup will clear but the check mark will remain in the Void box.



Make Adjustments for Individuals with a Paid Status

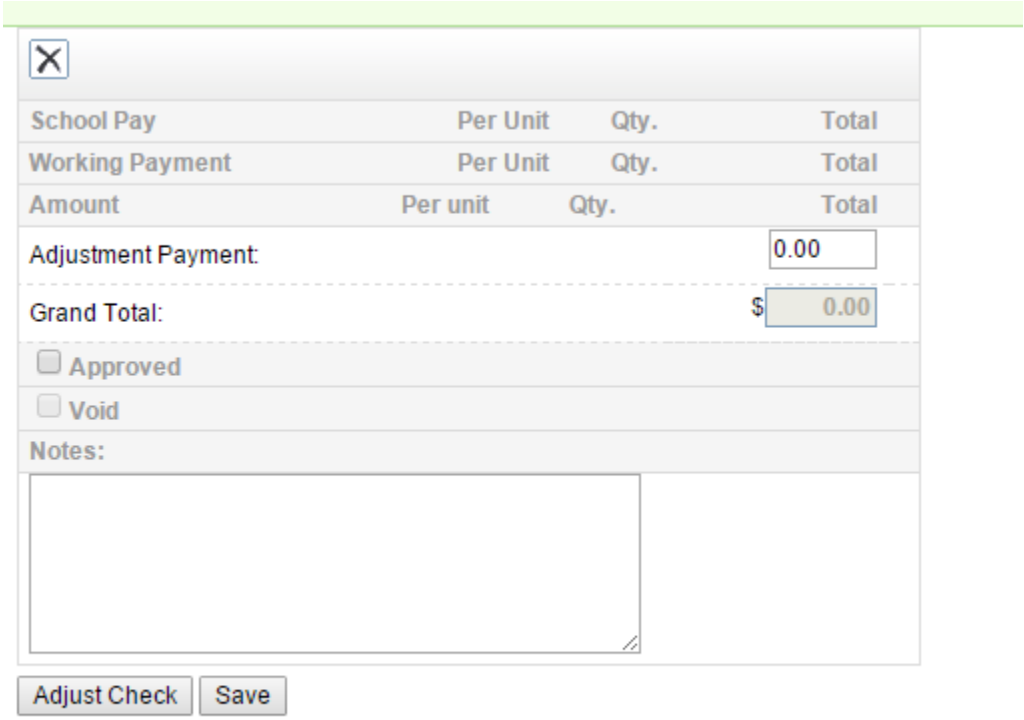
Once the payroll for a worker is marked as paid, you cannot make any changes to the payment amount. If any adjustment is needed, you can use the **Adjust Cheque** button to generate another payment.

Another check can be generated for additional payment or to replace a voided check.

Additional payment

If the payment amount for the first check must be increased for any reason, you only need to generate another paycheck for the additional amount.

- In the Payroll List page, click the Edit link of a worker to get to the Payroll edit page.
- Click the **Add Check** button at the bottom of the page. Another payment section will be added at the right side of the page.



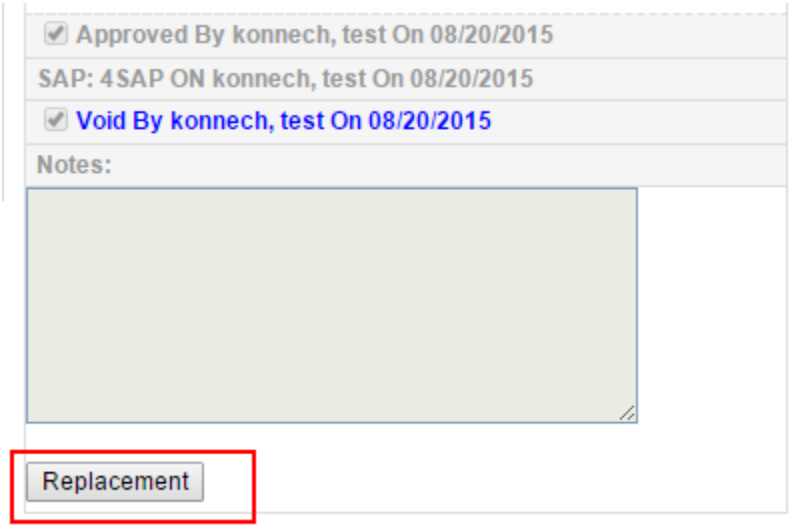
- Enter the payment information within the Adjustment Payment box.
- Check the Approved box.
- Click the **Save** button.

- An worker with an additional payment will be listed two times within the payroll tab – once with the paid status and the second time with the approved status for the new additional payment.
- Follow the steps above to add this additional payment

Generate a Replacement payment for a voided a payment

You may occasionally find it necessary to generate an adjustment check after one has been voided.

- On the Payroll List page, click the Edit link of a worker to get to the Payroll edit page.
- Within the screen that shows off a 'voided' payment, click 'replacement'. This will generate the payment detail which reflects the voided payment.



- Make changes to the payment using the 'adjustment' field if needed, and then click approve.
- Click the **Save** button once finished.