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Setup for an election when it is generated with no template

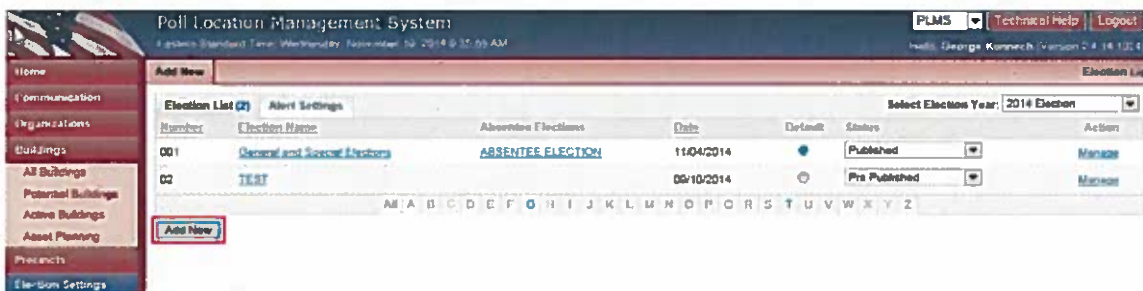
Setup within the Poll Location Module

Election Settings

Creating an election with no template

Creating an election with no template is the best way to build an election that may be smaller in size based on your typical election(s).

In the election settings tab – click ‘Add New’.



In the next screen, define the fields in red.

Do not click 'absentee election'

The 'status' relates to the online worker access module.

- 'Pre-Published' will have the election name be listed in the home screen to allow the workers to define if they are interested in serving for the election or not. The training classes and the worker's work assignment will be hidden.
- 'Published' will have the election name be listed in the home screen to allow the workers to define if they are interested in serving for the election. The training classes will be present for the worker to sign up for and they can review their work assignment.
- 'Locked' will have the election detail present, but the user won't be able to edit anything.

Leave the 'Election Settings Template' dropdown saying 'Select Template'.

Click 'Save'. This will create the election for you.

Poll Location Management System
Eastern Standard Time: Wednesday, November 19, 2014 9:36:31 AM

Home **Back** **Save**

Election Add/Edit

Include Absentee? ☐ **Absentee Election**

Election Name:

Election Number:

Election Date:

Status **Pre Published**

Election Settings Template: **Select Template**

Description:

Save

Precinct Tab

Add your Precincts

When creating an election with no template, you will not have any precincts defined. You'll have to add the desired precincts you want. There are 2 ways to do this:

CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN

Add New

In the precinct tab – Make sure the desired election is listed in the election dropdown. Then click on the number across from the word 'precinct'.

Click 'Add New' to add your precinct(s) to the election.

Define the precinct number. This is the only 'required' field. You can fill out the other fields if desired. Click 'Save'. You can click 'save/next' to give you a new 'add new' screen.

CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN

When you click 'back', the precinct(s) you created should be listed in the precinct list.

The screenshot shows the 'Precincts (2)' tab selected. The table lists two precincts, Q101 and Q102, with columns for Total / %, Active / %, Inactive / %, Absentee / %, and Action. The 'Action' column contains 'Edit' links. Below the table is an alphabetical index from A to Z. At the bottom are buttons for 'Add New', 'Delete', and 'Communication'.

PCIT	Building Name	Total / %	Active / %	Inactive / %	Absentee / %	Action
☒	Q101	0 / 0.00%	0 / 0.00%	0 / 0.00%	0 / 0.00%	Edit
☒	Q102	0 / 0.00%	0 / 0.00%	0 / 0.00%	0 / 0.00%	Edit

Add New by Importing via Excel Sheet

In the precinct tab – Make sure the desired election is listed in the election dropdown. Then click on the number across from the word 'precinct'.

In the precinct screen, click 'Import'

The screenshot shows the 'Precincts' tab selected in the left sidebar. The 'Import' button in the top navigation bar is highlighted with a red box. The main area shows the same precinct list as the previous screenshot.

Then click 'Download Template'.

The screenshot shows the 'Precincts Import' screen. The 'Download Template' button is highlighted with a red box. Below the button is a checkbox to 'Check the box to update the selected columns with the uploaded file.' and a list of instructions for using the template.

Precincts Import

☒ Check the box to update the selected columns with the uploaded file.

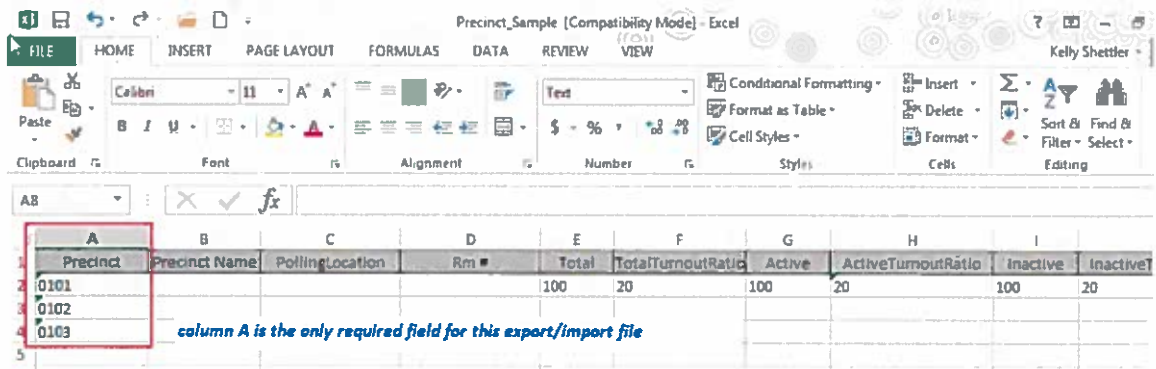
Maximum file size: 10MB.
The allowed file format: Xls, Xlsx
Required fields
Precinct

Operation Manual:

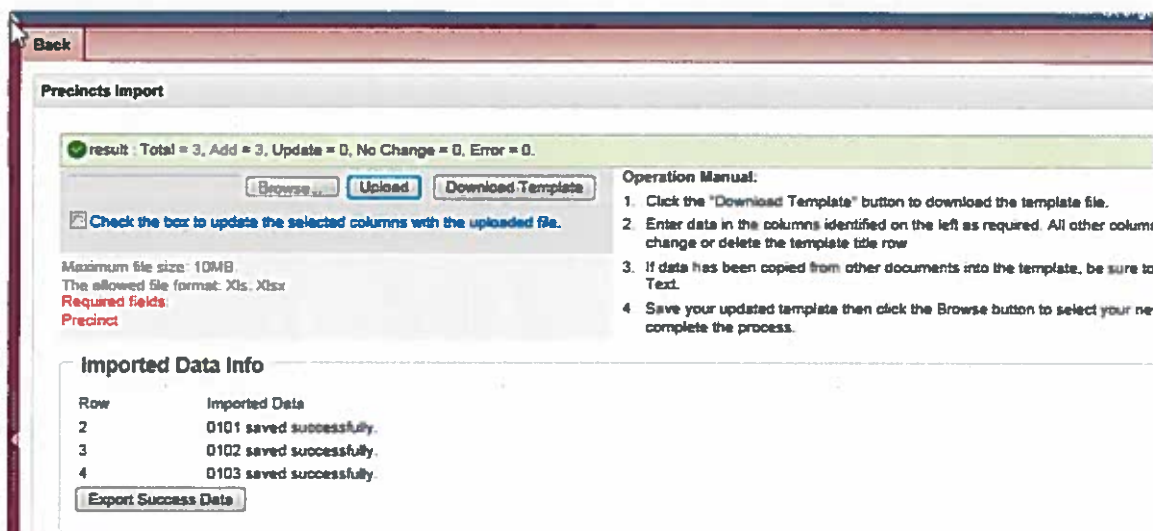
1. Click the "Download Template" button to download the template file
2. Enter data in the columns identified on the left as required. All other columns are optional. Do not change or delete the template title row
3. If data has been copied from other documents into the template, be sure to format all cells afterward as Text.
4. Save your updated template then click the Browse button to select your new template. Click Upload to complete the process.

In the excel file, define the precinct number in the column A. All other fields are optional to be filled out. ****NOTE**** you can only define the building name column IF you have the buildings setup in the active building tab.

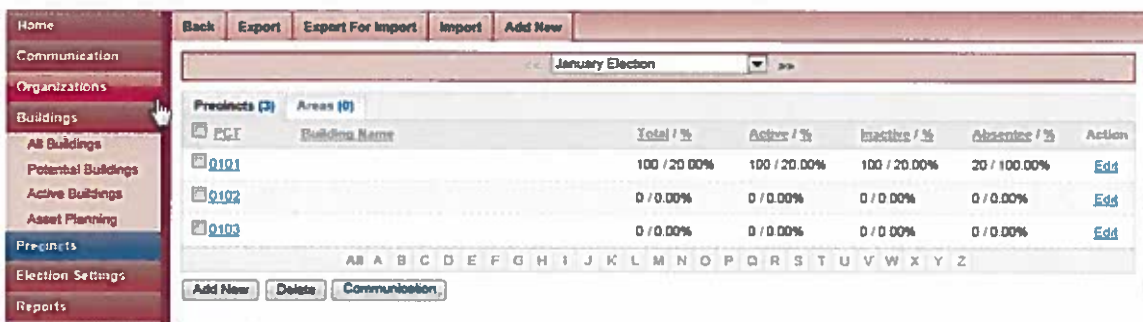
CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN



Save the excel file and then browse for it within the 'Import' screen and click 'Upload'. This should successfully upload the precinct list into the election.



In the precinct tab – you should now see the precincts.



Choosing your Active Buildings

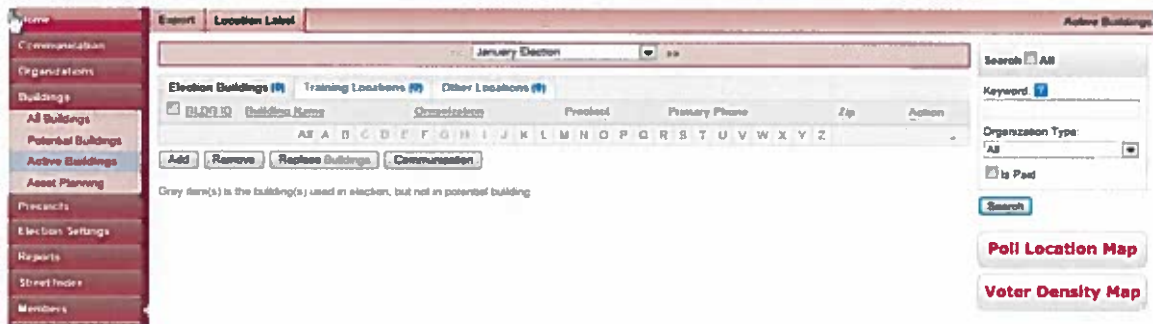
Active buildings are your election buildings, the training location(s) and the other locations that workers can be staffed at for the election.

Click on the Active Buildings tab in the menu bar. Then make sure the election desired is listed in the election bar.

CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN

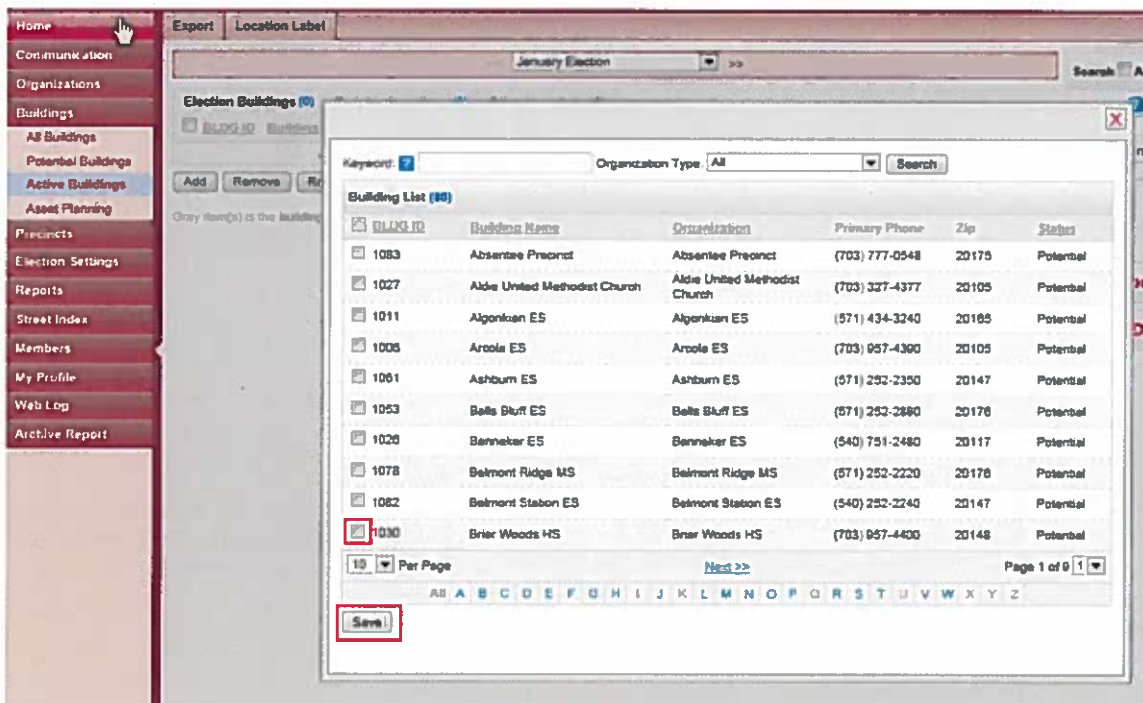
Election Buildings

The active buildings tab defaults open to the election buildings. Since this election was made with no template, you must choose which buildings will be used for the election.



Click 'Add'. In the popup, find the desired building and check the box next to it. Then click 'save'. This will add the building to the election buildings list.

Repeat this until you have all the buildings you want to use as election locations in the 'election building' list.



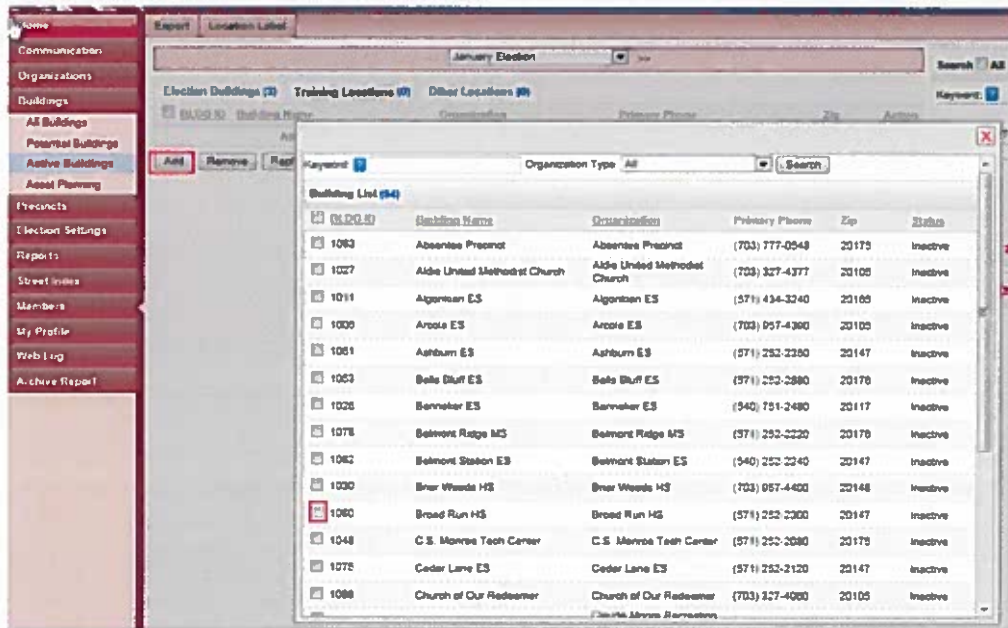
Training Locations

In the active building tab – click on Training Locations. This tab will house the location(s) that you plan to have training classes held at.

Click 'Add' within the Training Location tab. Click the check box next to the desired location you want and then click 'select'. This will add the building to the training location tab.

Repeat these steps until you have all the desired locations within the training location tab. This list then will be available for you in PWMS when you are creating your class sections.

CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN

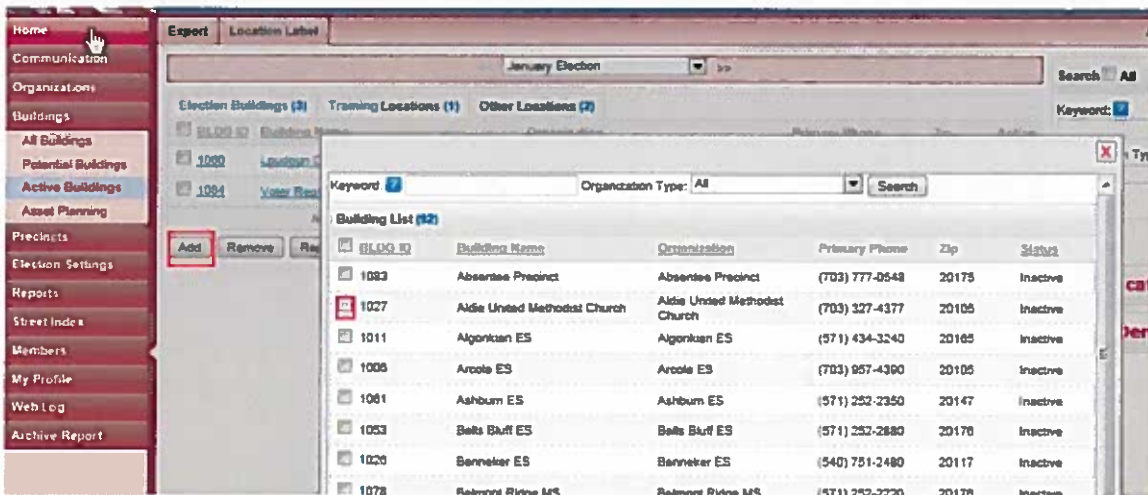


Other Locations

The other locations tab is used to define the locations that workers can be staffed at for the election that isn't a polling location.

In the active building tab – click on Other Locations.

Click 'Add' within the Other Locations tab. Click the check box next to the desired location and then click 'select'. This will add the building to the other location tab.



Assigning the Precincts to Election Buildings

There are two ways to do this for the election:

Assign Precincts from the Election Building tab

In the active building tab – make sure the correct election is listed in the election bar. Then click 'edit' across from the building desired in the Election Buildings tab.

CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN

The screenshot shows the Poll Location Management System (PLMS) interface. The top navigation bar includes 'Home', 'Communication', 'Organizations', 'Buildings', 'Precincts', 'Election Settings', 'Reports', and 'Street Index'. The 'Buildings' section is active, showing a list of buildings for the 'January Election'. The table has columns for Building ID, Building Name, Organization, Precinct, Primary Phone, Zip, and Action. The buildings listed are:

Building ID	Building Name	Organization	Precinct	Primary Phone	Zip	Action
1030	Brier Woods HS	Brier Woods HS		(703) 957-4400	20148	Add
1000	Little River ES	Little River ES		(703) 957-4360	20152	Add
1004	Rosa Lee Carter ES	Rosa Lee Carter ES		(703) 957-4400	20148	Add

Below the table are buttons for 'Add', 'Remove', 'Replace Buildings', and 'Communication'. A note at the bottom states: 'Gray dam(s) is the building(s) used in election, but not in potential building'.

Within the building's profile, scroll to the bottom of the screen to see the precinct tab. Click 'Add'.

The screenshot shows the building profile page for 'Brier Woods HS'. The left sidebar contains navigation links: 'Home', 'Communication', 'Organizations', 'Buildings', 'Precincts', 'Election Settings', 'Reports', 'Street Index', 'Members', 'My Profile', 'Web Log', and 'Archive Report'. The main content area has tabs for 'Basic Info', 'Contact Info', 'Other Info', and 'Building Room'. The 'Basic Info' tab is active, showing fields for Building ID (1030), Building Name (Brier Woods HS), Organization Name (Brier Woods HS), Building Address (22525 Belmont Ridge Rd), City (Ashburn), State (VA), Zip (20148), Primary Phone ((703) 957-4400), Constraint, Training Classroom #, Election Setup Area & Room #, Cross Street, Short Directions, Long Directions, and Comments. The 'Precinct' tab is highlighted at the bottom, showing a table with columns for PCT, Building Name, and Total / %. The 'Add' button is highlighted in the bottom left corner.

In the popup check the box next to the desired precinct(s) you want assigned to the building. Then click 'Select'.

CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN

The screenshot shows a 'Building Profile' window with a table of buildings. The table has columns: PCI, Building Name, Total / %, Active / %, Inactive / %, and Absentee / %. The data rows are:

PCI	Building Name	Total / %	Active / %	Inactive / %	Absentee / %
0101		100 / 20.00%	100 / 20.00%	100 / 20.00%	20 / 100.00%
0102		0 / 0.00%	0 / 0.00%	0 / 0.00%	0 / 0.00%
0103		0 / 0.00%	0 / 0.00%	0 / 0.00%	0 / 0.00%

Below the table is a 'Select' button. The 'Building Name' field is highlighted in red.

Click 'Save' in the building profile to save the change.

The screenshot shows the 'Building Profile' window with the 'Save' button highlighted. The 'Building ID' is 1030, 'Building Name' is Briar Woods HS, 'Organization Name' is Briar Woods HS, 'Building Address' is 22525 Belmont Ridge Rd, 'City' is Ashburn, 'State' is VA, and 'Primary Phone' is (703) 957-4400.

Click 'Back'. You should now see across from the building's name the precinct(s) you just assigned to the building.

The screenshot shows the 'Precincts' tab with a table of buildings and their assigned precincts. The table has columns: BLDG ID, Building Name, Organization, Precinct, Primary Phone, Zip, and Action. The data rows are:

BLDG ID	Building Name	Organization	Precinct	Primary Phone	Zip	Action
1030	Briar Woods HS	Briar Woods HS	0103	(703) 957-4400	20148	Edit
1000	Little River ES	Little River ES		(703) 957-4360	20182	Edit
1004	Rosa Lee Carter ES	Rosa Lee Carter ES		(703) 957-4490	20148	Edit

The 'Precinct' column for building 1030 is highlighted in red. Below the table are buttons: Add, Remove, Replace Buildings, and Communication.

Assign buildings to precincts from the Precinct tab

Click on the Precincts tab in the menu bar. Make sure the desired election is listed in the election bar. Then click on the number of precincts.

CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN

Home
Communication
Organizations
Buildings
All Buildings
Potential Buildings
Active Buildings
Asset Planning
Precincts
Election Settings
Reports

January Election

Areas: 9
Precincts: 3
Total Registered Voters: 100 / Total Turnout of Voters: 0

Click 'edit' across from the desired precinct.

Home
Communication
Organizations
Buildings
All Buildings
Potential Buildings
Active Buildings
Asset Planning
Precincts
Election Settings
Reports

Back Export Export For Import Import Add New

January Election

Precincts (3) Areas (9)

PCT	Building Name	Total / %	Active / %	Inactive / %	Absentee / %	Action
0101		100 / 20.00%	100 / 20.00%	100 / 20.00%	20 / 100.00%	Edit
0102		0 / 0.00%	0 / 0.00%	0 / 0.00%	0 / 0.00%	Edit
0103	Briar Woods HS	0 / 0.00%	0 / 0.00%	0 / 0.00%	0 / 0.00%	Edit

ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Add New Delete Communication

Use the Building Name dropdown to choose which building you want to assign the precinct to. Then click 'Save'.

Home
Communication
Organizations
Buildings
All Buildings
Potential Buildings
Active Buildings
Asset Planning
Precincts
Election Settings
Reports
Street Index
Members
My Profile
Web Log
Archive Report

Back View Next >> Save Save/Next

Precincts Add/Edit

January Election

Precinct: 0101

Precinct Name:

Is Town PCT:

Building Name:

Rm# and Name:

Rm Phone Number:

Building Address:

Street Address:

City:

State:

Zip:

Registered Voters:

Total: 100 Turnout Ratio (%): 20.00

Active: 100 Turnout Ratio (%): 20.00

Inactive: 100 Turnout Ratio (%): 20.00

Absentee: 20 Turnout Ratio (%): 100.00

Election District:

Split List

CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN

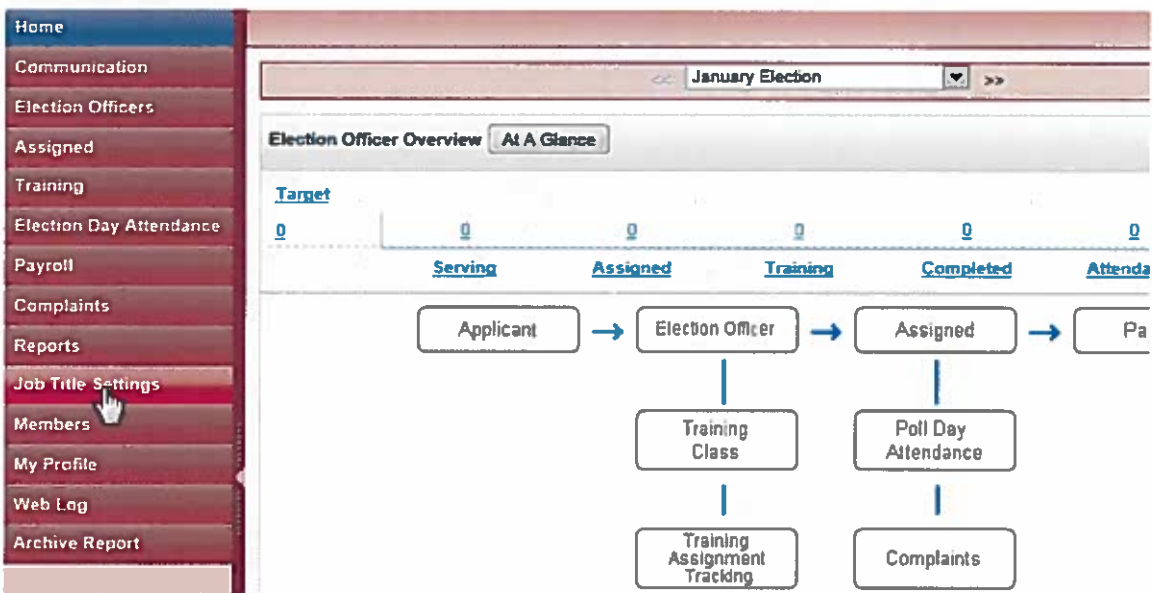
Back in the precinct list, you'll now see the building name across from the precinct. This is defining the building the precinct is assigned to.

Precincts (3)	Areas (0)	Building Name	Total / %	Active / %	Inactive / %	Absentee / %	Action
P01		Little River ES	100 / 20.00%	100 / 20.00%	100 / 20.00%	20 / 100.00%	Add
P101		Little River ES	0 / 0.00%	0 / 0.00%	0 / 0.00%	0 / 0.00%	Add
P102		Bear Woods HS	0 / 0.00%	0 / 0.00%	0 / 0.00%	0 / 0.00%	Add

Setup within the Election Officer Module

Job Title Settings Tab

Make sure the desired election is listed in the election bar. Then click on 'job title settings' from the menu bar.



Click Job Title Bank. This will pull up a popup of all the existing job titles. Check the box next to the desired ones you want to staff for the election and then click 'Save'.

Election Job Title (0)	Job Title	Type	Target	Day	Work Time	Pay Type	Payment	Adjustment Target	Action

CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN

Job Title	Type	Target	Day	Work Time	Pay Type	Pay	Action
Assistant Chief - AC	Per Precinct	1	0	12:00 AM-11:00 PM	Per Unit	\$0.000	Edit Delete
Chief - C	Per Precinct	1	0	12:00 AM-11:00 PM	Per Unit	\$0.000	Edit Delete
Officer - O	Per Precinct	0	0	12:00 AM-11:00 PM	Per Unit	\$0.000	Edit Delete
Rover - R	Per Area	0	0	12:00 AM-11:00 PM	Per Unit	\$0.000	Edit Delete
Officer AM - O-AM	Per Precinct	1	1	12:00 AM-08:00 PM	Lump Sum	\$75.000	Edit Delete
Officer PM - O-PM	Per Precinct	1	0	12:00 AM-04:00 PM	Lump Sum	\$75.000	Edit Delete

The job titles you chose will now be listed in the job title settings tab. Click 'Edit' across from each to edit any detail desired.

Job Title	Type	Target	Day	Work Time	Pay Type	Payment	Adjustment Target	Action
Assistant Chief-AC	Per Precinct	1	0	12:00 AM-11:00 PM	Per Unit	\$0.000	Adjustment Target	Edit
Chief-C	Per Precinct	1	0	12:00 AM-11:00 PM	Per Unit	\$0.000	Adjustment Target	Edit
Officer-O	Per Precinct	0	0	12:00 AM-11:00 PM	Per Unit	\$0.000	Adjustment Target	Edit

Setting up Training Class Types

When no template was used, you will have to define your class types for training. This entails you defining which job titles can take the class, the pay, and how many hours the class will last.

In the training tab – make sure the desired election is listed in the election bar. Then click Training Settings.

Section	Class Type	For Job Titles	Students/Limit	Location	Date/Time

Click 'Add'

CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN

The screenshot shows the PollChief software interface. On the left is a sidebar with navigation links: Home, Communication, Election Officers, Assigned, Training (highlighted in blue), Election Day Attendance, Payroll, and Complaints. The main content area is titled 'January Election' and contains a table with the following columns: Class Type (N), Training Locations (1), Instructors (N), For Job Titles, Pre-Required Class, Pay, and Action. Below the table are three buttons: 'Add', 'Delete', and 'Contributions'. A red box highlights the 'Add' button.

Fill the fields in as needed. Here is a description of each field:

Class Type code

Enter a class type code.

Class Type

Enter a class type name. The combination of the Class Type Code and the Class Type will be used as the final Class Type.

Targeted Groups:

Select the groups that will be allowed to attend the class sections of this type (if applicable). To select multiple, click on the type you want and hold down the Ctrl button on your keyboard at the same time. Your selection(s) will appear in blue.

Job Title

Select the job title(s) of election workers who will be allowed to attend the class sections of this class type. To select multiple, click on the type you want and hold down the Ctrl button on your keyboard at the same time. Your selection(s) will appear in blue.

Pre-Required Class

If there is any prerequisite for the class type, select it from the Pre-Required Class drop down list. Only workers that have completed the prerequisite can attend the class sections of the class type. If you don't want there to be a prerequisite for the class type, leave 'none' within the dropdown option.

Need Pay?

If a payment will be paid to anyone who has completed the class, check this check box. If the Need Pay? box is checked, the Pay Type and Payment fields will appear. If it is unchecked, the fields will be removed from the screen.

Pay Type

Hourly and Lump Sum are the Pay Type choices.

- If Hourly is selected as the Pay Type, the actual amount paid will be the amount entered in the Payment field multiplied by the number of training hours.

- If Lump Sum is selected as the Pay Type, attendees will be paid the amount entered in the Payment field.

Payment

Enter the dollar amount of the payment.

Assigned To

Workers – if set to workers, the payment of the class can be applied to the payroll tab only if the person worked the election

Both – if set to both, the payment of the class can be applied to the payroll tab if the person worked or didn't work the election

Training Hours

Enter the number of hours required to complete the training. Or you can think of this as the number of hours the class is. For example 3 hours long.

Description

Type a note if desired.

Click the **Save** button to save the class type.

Click the **Back** button to go back to the list of the class types. A new class type has been created and added to the list.

CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN

Training Class Type Add/Edit

Class Type Code:

Class Type Name:

Targeted Groups:

Job Title:

Pre-Required Class:

Need Pay?: ☐

Training Hours: (e.g. 3.00)

Description:

Save

Creating Class Sections

With the class types setup, you then can create your class sections. The sections will be the actual classes that have a date/time and class size limit.

In the training tab – click ‘add section’. Fill out the data as needed and then ‘Save’. You then will have class sections to assign to workers for the election.

Training Settings Training Materials Training Quizzes Attendance Scanning Work Barcode for Uncomplete Training Label

Keyword: **Search**

Training Class (0) Training Assignment Tracking (0) Applicants (0)

Section	Class Type	For Job Titles	Students/Limit	Location	Date
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z					

Add Section Copy From Other Elections Add Section By Copy Delete Communications Export Training Bar Code

CREATING AN ELECTION WITH NO ELECTION TEMPLATE CHOSEN

Home
Communication
Election Officers
Assigned
Training
Election Day Attendance
Payroll
Complaints
Reports
Job Title Settings
Members
My Profile
Web Log
Archive Report

Back Save

Section Add/Edit

Section:

Class Type:

Targeted Groups:

Job Title:

Instructor:

Training Location: ☐ Is Online

Address:

Rm# and Name:

Notes:

Training Materials:

Pre-generated Quiz:

Class Size:

Training Date/Time: 12 AM 00

Save

Conclusion

When creating your election with no template – you must setup your precinct list and your building list and then associate the two together. This is done in the Poll Location Module.

In EOMS – creating an election with no template makes you have to choose which existing job titles you want available for the election. You also have to setup your class types in order to setup the class sections.

With your precincts/buildings/job titles and training classes setup, you then can begin staffing workers to assignments and/or assigning them to training.