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# CHAPTER 5

## VOTER REGISTRATION & ELECTION MANAGEMENT SYSTEM (VREMS)

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### TABLE OF CONTENTS

TotalVote.....	53
Voter Registration Management .....	53
Voter Roll Maintenance .....	53
Election Cycle Management .....	53
Absentee and Mail Ballot Processing .....	53
Reporting and Analytics .....	53
TotalAddress.....	54
Address Standardization and Validation .....	54
Geocoding .....	54
Redistricting Support.....	54
Data Integration .....	54
ePulse.....	55
Election Day Monitoring .....	55
Incident Management .....	55
Resource Management .....	55
Communication Hub.....	55
Poll Pad .....	56
Voter Check-In.....	56
Real-Time Synchronicity.....	56
Voter Assistance.....	56
Accessibility .....	56
Project Overview.....	57
Phase One .....	57
Phase Two.....	57
Phase Three .....	57
User Support and Resources .....	58
VREMS User Guides .....	58
Getting Started with TotalVote.....	59
The Dashboard.....	59
User Account Information.....	60
Current Election .....	60
Home Icon .....	60
Navigation Bar.....	61

Voter Registration menu .....	61
Reports Menu.....	61
Election Management Menu.....	62
County Utilities Menu .....	62
Quick Search .....	63
Sidebar.....	63
Tasks .....	63
NCOA & ERIC.....	64
Forms.....	64
Mass Updates .....	64
Notices.....	64
Responses.....	65
Job Queue .....	65
Job Queue .....	66
Calendar .....	66
Message Board.....	67
Recently Viewed Records.....	67
Tasks .....	68
Voter Registration Stats .....	68
Processing Voter Signature Cards.....	69
Scanning Cards.....	69
Attaching Scanned Cards to Voter Profiles.....	71
Appendix: Notices.....	73
Appendix: Tasks.....	73
County Daily and Monthly Task Overview .....	74
Daily/Frequent Tasks .....	74
NevVoter.nv.gov Data/HAVA Services.....	74
Tasks .....	74
NCOA/ERIC.....	74
Forms.....	74
Notices see Processing and Sending Unsent Notices .....	75
Job Queue .....	75
Monthly/Infrequent Tasks .....	75
TotalAddress Managing Addresses in TotalVote.....	75
Reports .....	75
Voter Registration > Purge Registrants.....	75
Database Checks (Database Development Pending).....	75
Setting Up Notices.....	76
Creating County Templates from a State Master .....	76
Modifying an Existing Template.....	77
Code Hook Reference .....	81
Voter Status Triggers .....	81

Vote Profile Flag Triggers .....	81
Ballot Status Triggers .....	82
Setting Up County Information .....	83
Uploading the County Seal and Clerk’s Signature .....	83
Entering County Office Information .....	86
Processing Third Party Applications .....	89
Automatically Processed Third Party Applications.....	90
Manually Processed Third Party Applications .....	90
Manually Generating the Missing Party Notice.....	93
Processing Voter Notification Cards .....	96
Auditing Registration Activity .....	97
Running the Audit Activity Report.....	97
Running the Golden Voter RLB to NPP Report .....	98
Processing a Deceased Notice .....	99
Processing Opt Out Requests .....	102
Updating Voter Profiles .....	102
Scanning Paper Requests.....	103
Creating a List of Opt Out Voters .....	105
Running Opt Out Reports.....	106
Defined Signature Area in Forms/Returned Notices .....	107
Processing and Sending Unsent Notices .....	109
Managing Notices & Correspondence from the Dashboard.....	109
In the Voter Profile.....	110
Exporting Notices for Mail Vendors.....	111
Exporting Notices (CSV).....	111
Email Notification .....	111
Notice CSV Export queue.....	112
Exporting Notices (PDF).....	113
Exporting Address Labels (CSV) .....	115
Exporting Address Labels (PDF).....	117
Printing Notices for In-House Mailings.....	118
Printing a Batch of Unsent Notices .....	118
Printing Individual Unsent Notices .....	119
Printing Address Labels (Avery).....	119
Marking Notices as Sent.....	121
Marking a Batch of Notices as Sent.....	121
Email Notifications .....	122
Notice CSV Export Queue.....	124
Marking an Individual Notice as Sent.....	125
Deleting Unsent Notices .....	126
Recording a Correspondence Activity.....	128
Mail Correspondence .....	129

Email Correspondence .....	130
Phone Correspondence.....	131
In-Person Correspondence .....	131
Reporting .....	133
Running the Sent Notices Reports .....	133
Downloading the Sent Notices Report .....	134
Printing the Sent Notices Report .....	134
Processing Forms and Returned Notices.....	136
Scanning a Form or Returned Notice .....	136
Uploading a Form or Notice .....	138
Updating Correspondence Activity.....	138
Merging Duplicate Profiles .....	140
Merging Duplicates from the Task Queue.....	140
Merging Specific Profiles .....	142
Setting Up Polling Places.....	144
Creating Polling Places .....	144
Printing a Polling Place Listing.....	145
Assigning Polling Places to Elections.....	146
Copying Polling Place Selections .....	147
Entering Incumbents .....	148
Setting Up an Election - State .....	150
Reviewing Districts .....	150
Creating the Election .....	151
Confirming Offices.....	151
Setting up a Ballot - State .....	155
Adding Statewide Contests .....	155
Adding Candidates .....	156
Setting Candidate Order .....	157
Adding Statewide Ballot Questions.....	157
Running Candidate Proofing Reports .....	159
Appendix: Office Sequence Numbers .....	159
Setting Up an Election - County .....	161
Selecting the Election .....	161
Confirming Offices.....	161
Setting up a Ballot - County .....	164
Adding Contests .....	164
Using Schedule Contests .....	164
Adding Contests Individually .....	165
Adding Candidates .....	166
Setting Candidate Order .....	168
Adding County Ballot Questions.....	168
Generating Ballot Styles.....	169

Running Ballot Pre-Proofing Reports .....	171
Comparing Reports and Making Corrections.....	173
Appendix: Office Sequence Numbers .....	173
Verifying Districts and Precinct Assignments .....	175
Managing Offices .....	177
Appendix: Office Sequence Numbers .....	178
Generating the Election Package .....	181
Exporting the Vendor Tabulation File.....	181
Preparing the Election Package.....	182
Sending Election Package to Tabulation Vendor.....	182
Ballot Proofing - Dominion.....	183
Running Ballot Proofing Reports .....	183
Comparing Reports and Making Corrections.....	183
Updating and Resubmitting the Election Package.....	184
Creating and Proofing Ballot Images .....	184
Submitting Project Package Authorization .....	184
Preparing the Final Election Project Package .....	184
Locking the Ballot Setup .....	185
Providing Ballot Images and Test Decks to the Print Vendor.....	185
Submitting Print Vendor Authorization .....	185
Ballot Proofing -ES&S.....	186
Running Ballot Proofing Reports .....	186
Comparing and Making Corrections .....	186
Proofing Election Data On Tabulators .....	187
Proofing Ballot Images.....	188
Updating and Resubmitting the Election Package.....	188
Submitting Project Package Authorization .....	188
Locking the Ballot Setup .....	188
Providing Ballot Images and Test Decks to the Print Vendor.....	189
Submitting Print Vendor Authorization/Approval .....	189
Outbound Ballot Processing.....	190
Preparing the Sample Ballot Mailing List.....	190
Preparing Outbound Ballots.....	192
Reports .....	196
Quick Search .....	196
Advanced Search.....	197
Defining Your Search Parameters .....	197
Exporting Search Results .....	199
Saving Advanced Search.....	201
Schedule a Saved Search to Run Automatically .....	202
Search by Voting History.....	203
Creating Notices from Advanced Search Results.....	206

Search Tips .....	207
Wildcard Help .....	207
Searching by Name.....	208
Searching by Date Range .....	208
Searching by Address.....	208
Advanced Search Log.....	209
Ballot Search .....	210
Registrant Records Views .....	210
Reports Canned Reports .....	210
Canned Report Definitions .....	211
Districts and Precincts .....	212
Election Management .....	212
Voter Registration.....	213
Audit Export CSV.....	214
Report Builder – Creating a Report .....	215
Share, Edit, Delete and Schedule Created Reports.....	219
Electronic Register Testing / Poll Pad Certification in ePulse.....	224
Generating and Uploading ePulse Files.....	229
Generating ePulse Files in TotalVote.....	230
Building an Election in ePulse.....	230
Creating the Election .....	230
Uploading the Voter File .....	230
Uploading the Polling Places File .....	231
Importing Street Rules.....	234
Regenerating the Poll Pad Database .....	236
Uploading the Signature Files.....	237
Connecting TotalVote and ePulse.....	239
Dominion-Specific Processes .....	242
Importing Ballot Styles .....	242
Configuring Vote Card Encoders .....	243
PollPad Election Testing in ePulse .....	244

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# VOTER REGISTRATION & ELECTION MANAGEMENT SYSTEM (VREMS)

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Voter Registration and Election Management System (VREMS) as mandated by [Nevada Assembly Bill 422](#) from the 2021 legislative session, is comprised of software systems including TotalVote, TotalAddress, ePulse, and Poll Pad, and aims to streamline and enhance security of the administration of elections in the State of Nevada. Some of its core functionalities include voter registration management, address validation, real-time election monitoring, and efficient voter check-in processes. Per Nevada Assembly Bill 422, this system is required to ensure the accuracy, integrity, and efficiency of the entire electoral process, from voter registration through to the final tabulation and reporting of election results.

The system also standardizes processes and responsibilities for election officials in charge of managing these platforms. These officials must ensure that the voter data is current and accurate, electoral rolls are well-maintained, and precincts are correctly assigned. They must also oversee real-time monitoring on election day, manage resources effectively, and promptly address any reported issues to uphold election integrity. Furthermore, they are responsible for ensuring smooth check-in procedures and keeping all involved parties informed with up-to-date information, enhancing voter trust and transparency in the electoral process.

By incorporating the following software solutions, the State of Nevada will be able to manage elections more efficiently, securely, and accurately, ensuring a smooth electoral process and maintaining voter trust and transparency.

## TotalVote

TotalVote is an integrated election management system designed to streamline various components of the election process. Functions include:

### Voter Registration Management

- Facilitates the registration of new voters and updates existing records.
- Supports online voter registration (OVR) and integrates with DMV systems for automatic updates.
- Ensures accuracy and compliance with state laws and federal regulations like the Help America Vote Act (HAVA).

### Voter Roll Maintenance

- Automated tools to detect duplicate records.
- Regular updates to keep voter roll current and accurate, using data from a variety of sources.

### Election Cycle Management

- Schedule and manage all phases of the election cycle, including primaries, general elections, and special elections.
- Enables election officials to manage the variety of ballot styles and districts needed.

### Absentee and Mail Ballot Processing

- Tracks absentee ballot requests, processing, and returns.
- Ensures that all mail ballots are accounted for and processed securely.

### Reporting and Analytics

- Provides comprehensive reporting capabilities for election results and voter statistics.
- Data visualization tools for better insights and decision-making.



## TotalAddress

TotalAddress is a geospatial address management system aimed at ensuring the integrity and accuracy of address data within the election process:

### Address Standardization and Validation

- Ensures all addresses are correctly formatted and standardized according to USPS guidelines.
- Validates the accuracy of addresses to support fair redistricting and precinct assignments.

### Geocoding

- Assigns precise geographical coordinates to each address, aiding in the accurate mapping of districts and precincts.
- Crucial for ensuring voters are correctly assigned to their respective polling locations.

### Redistricting Support

- Helps in planning and managing changes in district boundaries to reflect population shifts accurately.
- Provides visual tools to see the impact of redistricting efforts on various demographics.

### Data Integration

- Integrates voter registration and election management systems like TotalVote, enhancing overall data consistency.

## ePulse

ePulse is an election management platform focusing on real-time monitoring and control of election day activities:

### Election Day Monitoring

- Provides live updates on voting activities across polling stations.
- Tracks voter turnout, machine status, and any irregularities as they occur in real-time.

### Incident Management

- A centralized system to report, track, and resolve any issues or incidents on election day quickly.
- Ensures election integrity by allowing election officials to address issues immediately.

### Resource Management

- Manages allocation of election resources, like voting machines and personnel, ensuring they're deployed efficiently.
- Ensures that high-volume polling stations are adequately staffed and equipped.

### Communication Hub

- A platform to ensure all election workers and officials are consistently updated with critical information.
- Facilitates swift decision-making and operational adjustments as needed

## Poll Pad

Poll Pad is an electronic poll book system designed to support the check-in process at voting locations:

### Voter Check-In

- Simplifies and accelerates the voter check-in process by allowing poll workers to verify voter information digitally.
- Reduces errors

### Real-Time Synchronicity

- Updates across all connected Poll Pads instantaneously, preventing multiple vote attempts if a voter has already checked in elsewhere.
- Enhances the accuracy of voter turnout data.

### Voter Assistance

- Provides easy access to voter information, enabling poll workers to assist voters more effectively and resolve registration issues on the spot.

### Accessibility

- Software designed to be user-friendly for both poll workers and voters, including those with disabilities.
- Supports multiple languages and has interface customization options to meet local requirements.

## Project Overview

The implementation of the Voter Registration and Election Management System (VREMS) is structured into three distinct phases:

### Phase One

Commencing in October 2023 and concluding in August 2024, this phase marked the go-live of the TotalVote system. It enabled the following administrative tasks:

- Voter Registration
- Maintenance of Voter Registration Lists
- Sending Notices
- Election Creation
- Ballot Management
- Polling Locations
- Poll Books

### Phase Two

This phase is set to begin immediately after the completion of Phase One, with an anticipated conclusion in February 2025. Enhancements during this phase will focus on the following areas, among others:

- Automatic Voter Registration Improvements
- Reporting Enhancements
- Poll Pad enhancements
- Additional enhancements identified during Phase One

### Phase Three

Following the completion of Phase Two, this phase is tentatively scheduled to be completed by June 2025. Key components of Phase Three will include:

- Integration with Clark County
- Election Worker Management System
- Election Night Results Management
- Petitions Management
- Campaign Finance Oversight

## User Support and Resources

The VREMS project team is dedicated to providing comprehensive training and user support. We offer clear, easy-to-understand user guides and step-by-step instructions to facilitate the effective management of each system. Given the rapid pace of changes and enhancements, these guides and instructions are regularly updated to align with the current system configurations.

The user guides included in this manual provide a high-level overview of some systems, processes, and tasks available as of September 6, 2024.

For access to the latest user guides and instructions, please contact the VREMS Project Managers, training team, or for technical support contact the VREMS Help Desk at:

VREMS Help Desk:  
Monday – Friday  
8:00am – 5:00pm  
Phone: 775-684-5801  
Email: [vremssupport@sos.nv.gov](mailto:vremssupport@sos.nv.gov)

### VREMS User Guides

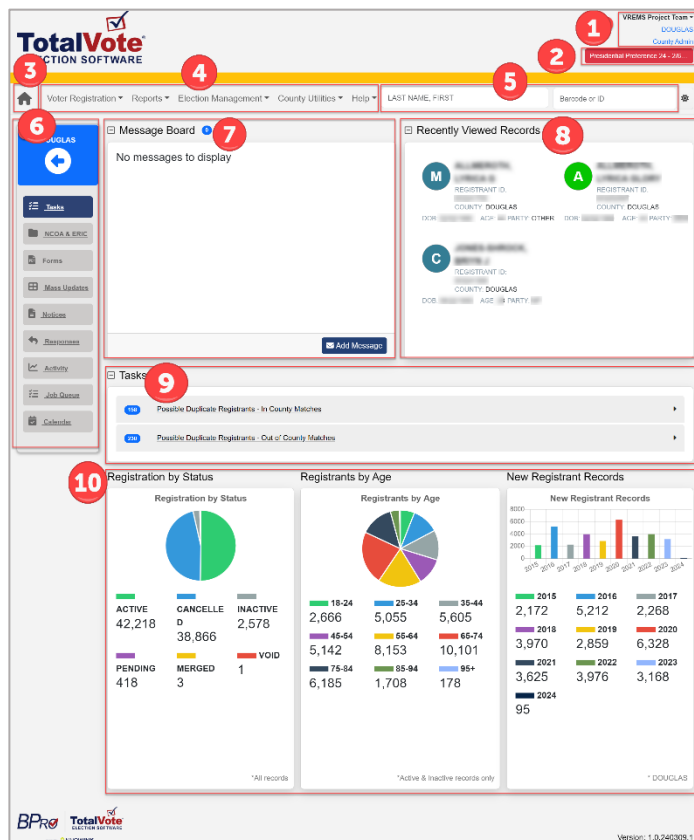
- Getting Started with TotalVote
- County Daily and Monthly Task Overview
- Setting Up Notices
- Code Hook Reference
- Setting Up County Information
- Processing Third Party Applications
- Processing a Deceased Notice
- Processing Opt Out Requests
- Defining the Signature Area in Forms and Returned Notices
- Processing and Sending Unsent Notices
- Processing Forms and Returned Notices
- Merging Duplicate Profiles
- Setting Up Polling Places
- Entering Incumbents
- Setting Up an Election – State
- Setting Up an Election – County
- Verifying Districts and Precinct Assignments
- Managing Offices
- Generating the Election Package
- Ballot Proofing – Dominion
- Ballot Proofing – ES&S
- Outbound Ballot Processing
- Reports
- Generating ePulse Files in TotalVote

## Getting Started with TotalVote

TotalVote, TotalAddress, ePulse, and Poll Pads comprise a suite of voter registration and election management tools implemented by the Nevada Secretary of State under the authority of [Assembly Bill 422](#). This document is an introduction to TotalVote.

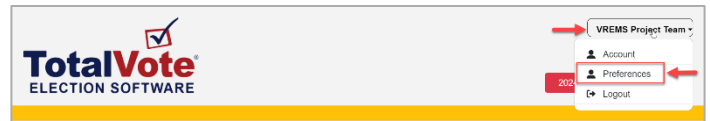
### The Dashboard

1. The TotalVote landing page is a Dashboard with informational elements and access to system navigation, tasks, and job queues for day-to-day voter database maintenance and administration. **User Account Information**  
Username, jurisdiction, role, and access to user preferences.
2. **Current election**  
Election that user actions impact.
3. **Home icon**  
Opens the Dashboard from anywhere in the system.
4. **Navigation Bar**  
Five drop-down menus, each with an alphabetized list of options.
5. **Quick Search**  
Simple voter search available at the top of any screen in TotalVote.
6. **Sidebar**  
Links to commonly used system functions.
7. **Message Board**  
Notifications from county and state administrators.
8. **Recently Viewed Records**  
Last six voter profiles viewed with registration status.
9. **Tasks**  
Items for user review or action.
10. **Voter Registration Statistics**  
Chart view of voter metrics.



## User Account Information

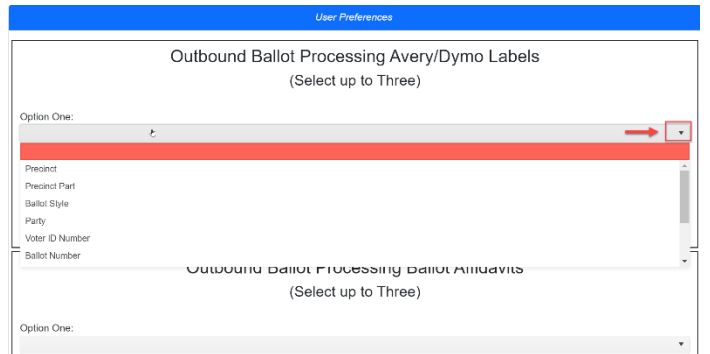
Username and administrative role are displayed in the upper right corner of the TotalVote Dashboard.



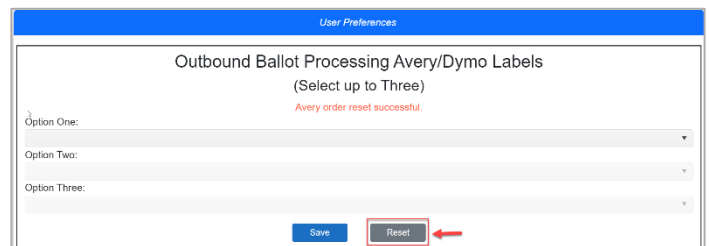
Click **Preferences** to set the sort order for Outbound Ballot Processing:

- Avery/Dymo Label type
- Affidavit order
- CSV export order

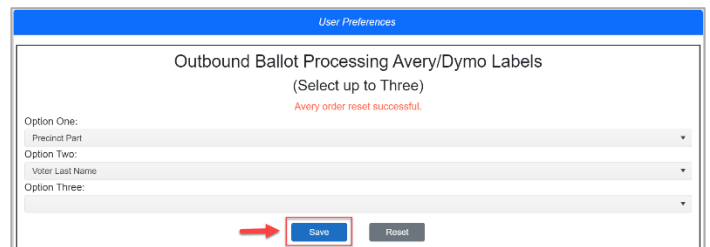
Select the preferred sort order for each of the three options, clicking **[Save]** after each selection.



To select a different sort order after a Preference has been set, click **[Reset]**.



Select the preferred sort order and **[Save]**.



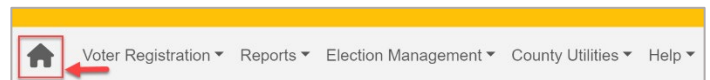
## Current Election

The red Election button under user account information displays the current election and provides quick access to the full list of elections.



## Home Icon

Far left of the Navigation Bar. Clicking the Home icon displays the TotalVote Dashboard (home page).

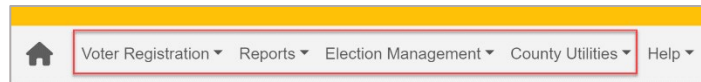


## Navigation Bar

Top of every screen. Four dropdown menus giving access to TotalVote functions available to your user role and permissions:

- Voter Registration
- Reports
- Election Management
- County Utilities

Menu items under each dropdown list are organized alphabetically.

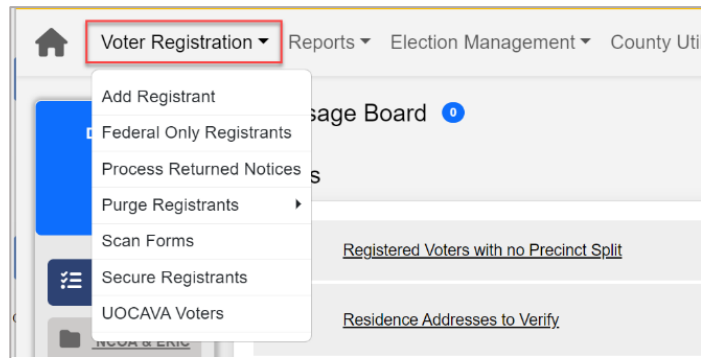


## Voter Registration menu

- Add Registrant  
Pre-Add Search and [Add New]
- **Federal Only Registrants**  
List of voters with Federal Only flag toggled On; Precinct 999.
- **Process Returned Notices**  
Digitize; attach to voter profiles
- **Purge Registrants 4**  
Update registrant status to Cancelled for Failed ID check, Inactive, or Invalid Address
- **Scan Forms**  
Digitize Registration applications and correspondence
- **Secure Registrants**  
List Court Ordered and Standard Secure voters of any status

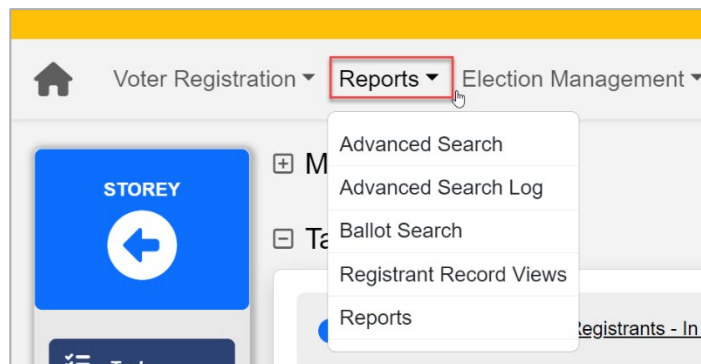
### UOCAVA Voters

List UOCAVA voters of any status



## Reports Menu

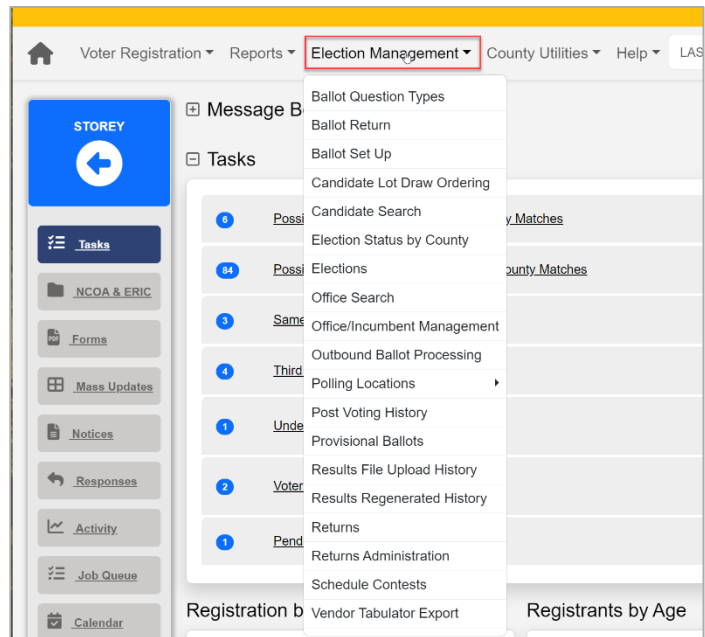
- **Advanced Search**  
Search by Voter, address, Precinct, voting history
- **Advanced Search Log**  
View any user's search results
- **Ballot Search**  
Ballot-specific search criteria
- **Registrant Record Views**  
Audit of voter record access
- **Reports**  
Canned reports and Report Builder





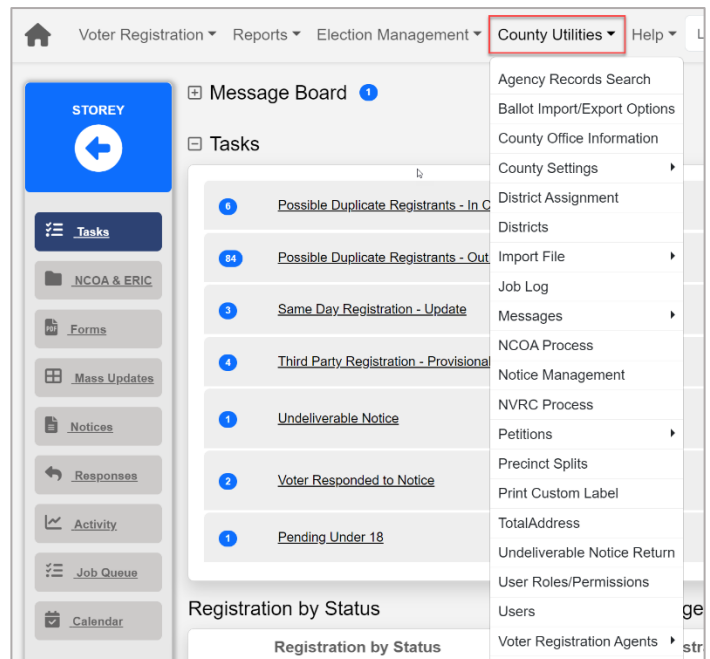
## Election Management Menu

- Ballot Question Types
- Ballot Return
- Ballot Set Up
- Candidate Lot Draw Ordering
- Candidate Search
- Election Status by County
- Elections
- Office Search
- Office/Incumbent Management
- Outbound Ballot Processing
- Polling Locations 4
- Post Voting History
- Provisional Ballots
- Results File Upload History
- Results Regenerated History
- Returns
- Returns Administration
- Schedule Contests
- Vendor Tabulator Export



## County Utilities Menu

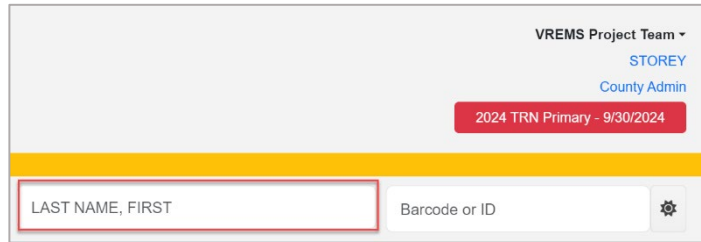
- Agency Records Search
- Ballot Import/Export Options
- County Office Information
- County Settings 4
- District Assignments
- Districts
- Import File 4
- Job Log
- Messages 4
- NCOA Process
- Notice Management
- NVRC Process
- Petitions 4
- Precinct Splits
- Print Custom Label
- TotalAddress
- Undeliverable Notice Return
- User Roles/Permissions
- Users
- Voter Registration Agents4 Agents, Forms, Organizations



## Quick Search

**Note:** LAST NAME, FIRST field searches **the county** for matching records while **Barcode or ID** field searches **state-wide**.

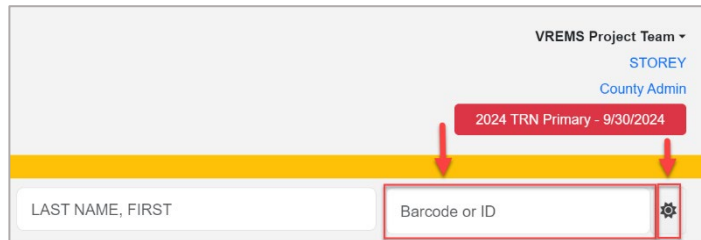
Enter the first few letters of a **name** (last or first) or enter a **birthdate** in MM/DD/YYYY format in the **LAST NAME, FIRST** field to see a list of potential matches in the county.



The screenshot shows the top navigation bar with 'VREMS Project Team', 'STOREY', and 'County Admin'. A red banner indicates '2024 TRN Primary - 9/30/2024'. Below the navigation bar, there are two search input fields: 'LAST NAME, FIRST' (highlighted with a red box) and 'Barcode or ID'. A gear icon for settings is located to the right of the 'Barcode or ID' field.

Enter a voter's Registrant **ID** number or **ballot number** in the **Barcode or ID** field to search state-wide.

Click the sunshine icon ☀ to toggle between light and dark display modes.



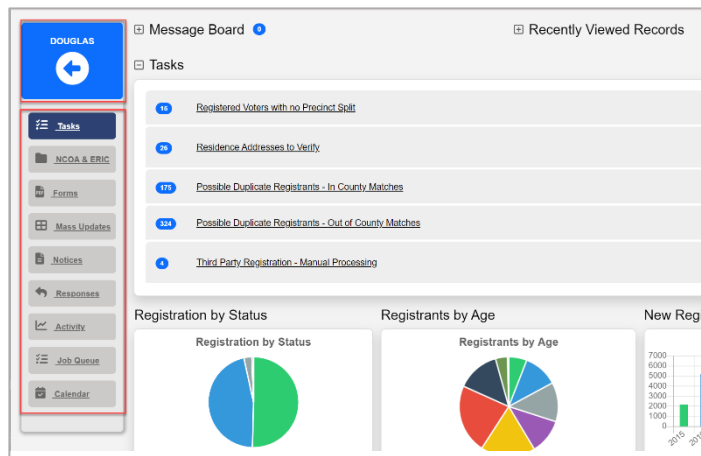
This screenshot is similar to the previous one, but the 'Barcode or ID' field is highlighted with a red box. A red arrow points to the sunshine icon (☀) located to the right of the 'Barcode or ID' field, indicating its function to toggle display modes.

## Sidebar

Some Sidebar items may not be displayed depending on the user's profile and permissions.

- Tasks
- NCOA & ERIC
- Forms
- Mass Updates
- Notices
- Responses
- Activity (not implemented)
- Job Queue
- Calendar

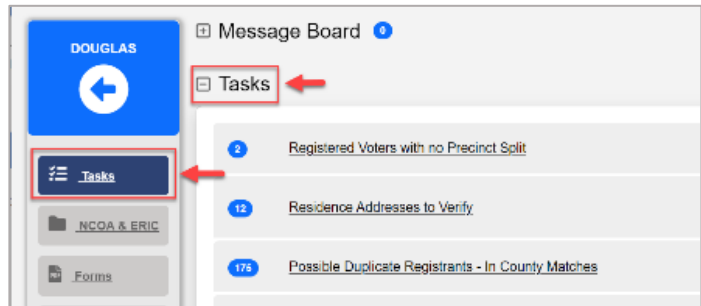
To minimize the Sidebar, click the left arrow below the county name.



The screenshot shows the full interface. On the left is a sidebar with a blue header 'DOUGLAS' and a back arrow. Below the header are several menu items: 'Tasks' (highlighted with a red box), 'NCOA & ERIC', 'Forms', 'Mass Updates', 'Notices', 'Responses', 'Activity', 'Job Queue', and 'Calendar'. The main content area includes a 'Message Board' with a notification count of 4, a 'Tasks' list with items like 'Registered Voters with no Precinct Split', 'Residence Addresses to Verify', and 'Possible Duplicate Registrants - In County Matches'. Below the tasks are two pie charts: 'Registration by Status' and 'Registrants by Age', and a 'New Reg' bar chart.

## Tasks

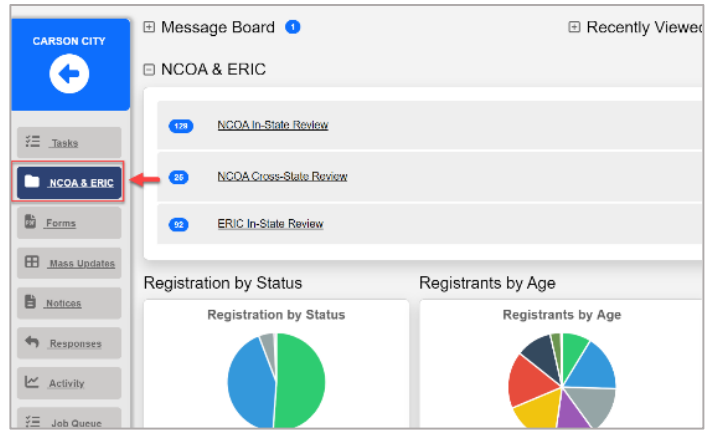
See list in Tasks.



This screenshot is similar to the previous one, but the 'Tasks' item in the sidebar is highlighted with a red box. A red arrow points from this box to the 'Tasks' header in the main content area, indicating that clicking the sidebar item will filter the main content to show only tasks.

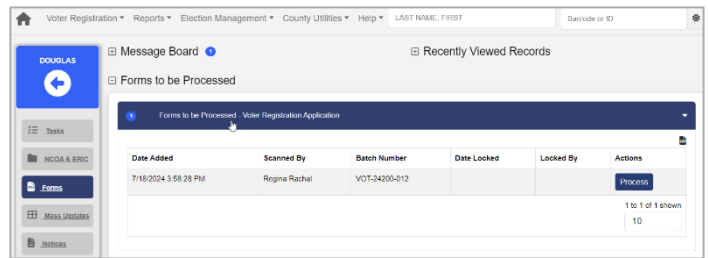
## NCOA & ERIC

In-state and cross-state NCOA change of address matches, deceased records from the Social Security Administration death index, and matches to voters from other state DMV and voter registration records via ERIC.



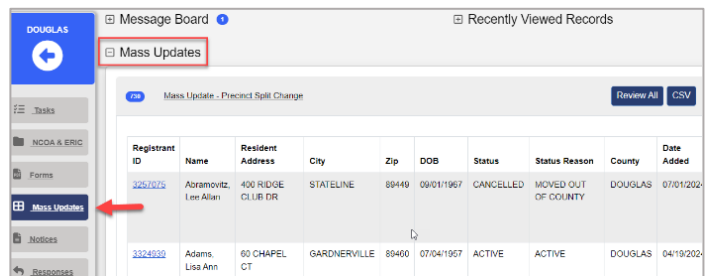
## Forms

Voter Registration forms scanned and batched for processing using Voter Registration > Scan Forms.



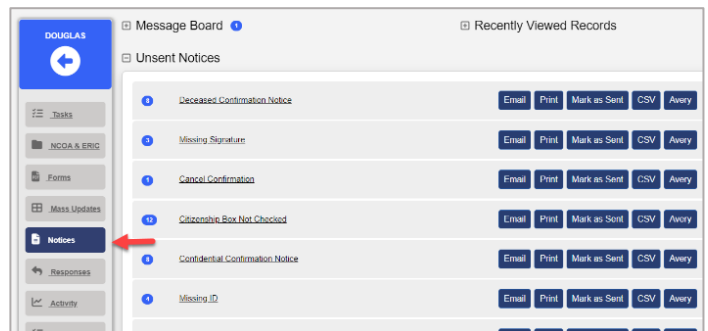
## Mass Updates

Used to process large groups of voter records.



## Notices

Unsent Notices  
List maintenance and ballot processing tasks trigger processes that create Tasks in the Task queue. See Appendix: Notices.



## Responses

Notices returned by voters that have been scanned into TotalVote using **Voter Registration > Scan Forms** appear in the **Responses** queue for review and processing.

Form Type  
Notice Response

Scan Image(s)

Select Language  
English

Select Scanner

Show Scanner Settings on Scan

Color Mode  
 B&W  
 Gray  
 Color

Pages Per Image 1

Attachment Notes

Scan Image Load Images

## Job Queue

- A “container” that holds background processes for large reports and resource-intensive system functions. Jobs are grouped by type:
- Load Ballots
- Create Mailing Batch
- Mark Pending as Sent
- Notice CSV Export
- Report Builder Report
- Create Labels
- Generate ePulse Files
- Generate ePulse Signature File
- Run large reports

Activity Job Queue Calendar

Load Ballots

Create Mailing Batch

State	Create Details	Create Date	Created By	Last Updated	Actions
Finished	Mail - In State (English)	6/27/2024 2:38:03 PM	Amy Burgans	6/27/2024 2:38:13 PM	Remove View
Finished	Mail - Out Of State (Overseas Military) (English)	6/27/2024 10:13:28 AM	Amy Burgans	6/27/2024 10:13:28 AM	Remove View
Finished	Mail - Out Of State (Overseas US Citizen) (English)	6/27/2024 10:13:18 AM	Amy Burgans	6/27/2024 10:13:18 AM	Remove View
Finished	Mail - Out Of State (Domestic Military) (English)	6/27/2024 10:13:03 AM	Amy Burgans	6/27/2024 10:13:03 AM	Remove View
Finished	Mail - In State (Overseas US Citizen) (English)	6/27/2024 10:12:48 AM	Amy Burgans	6/27/2024 10:12:48 AM	Remove View
Finished	Mail - Out Of State (English)	6/27/2024 9:59:47 AM	Amy Burgans	6/27/2024 9:59:48 AM	Remove View
Finished	Mail - In State (Domestic Military) (English)	6/27/2024 9:56:17 AM	Amy Burgans	6/27/2024 9:56:17 AM	Remove View

1 to 7 of 7 shown  
10

Mark Pending as Sent

Notice CSV Export

## Job Queue

- **State:** Status of each job
- **Last Updated:** The time a job was last updated.
- **Actions:** Option to View, Download, Remove, Delete, depending on job.

When the job is complete, access the results in the Job Queue:

- [View] - reports
- [Download] – file exports
- [Remove] – canceled voters
- [Delete] –after downloading

Click to expand a Queue. Displays scheduled reports or jobs and resulting download when available.

Job Queue States	
<b>Enqueued</b>	Pending
<b>Processing</b>	Currently running
<b>Finished</b>	Successfully completed
<b>Duplicate</b>	<p>A job with the same parameters is currently running.</p> <p>A user launched the same process more than once (e.g., clicking twice on [Generate ePulse Files]).</p> <p>Duplicate jobs are skipped in the queue.</p>
<b>Error</b>	<p>Did not complete successfully.</p> <p>Go to County Utilities &gt; Job Log for error reason.</p>

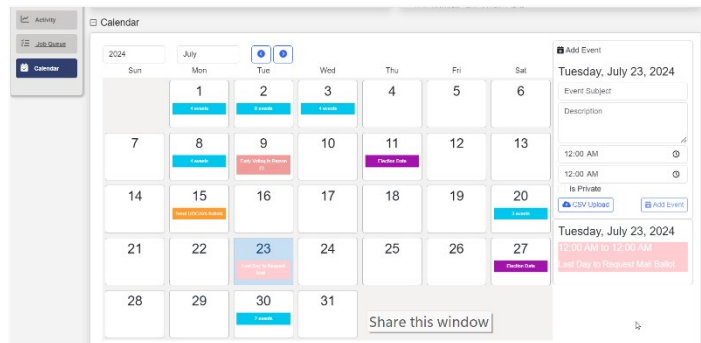
When a job in the queue is complete, TotalVote sends an email notification to the user that launched the process.  
**NOTE:** Users see only their own reports or exports.

noreply@totalvote.com  
**Report Builder Report Finished**

WARNING - This email originated from outside the State of Nevada. Exercise caution when openi

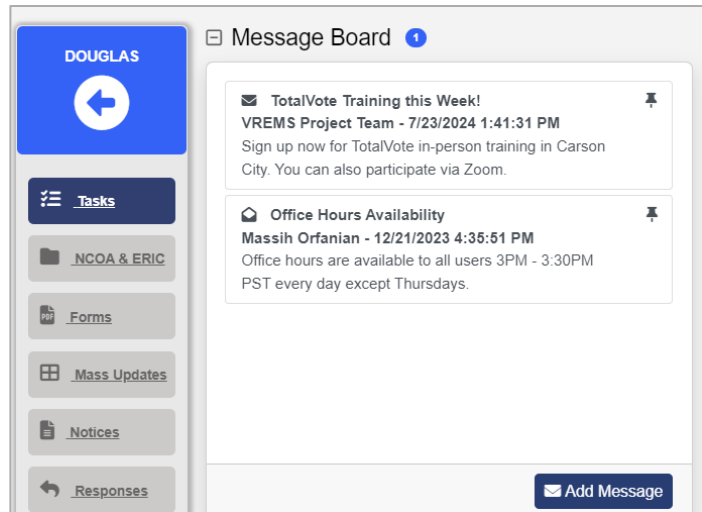
## Calendar

Voter registration and election-related dates added by state and county admins.



## Message Board

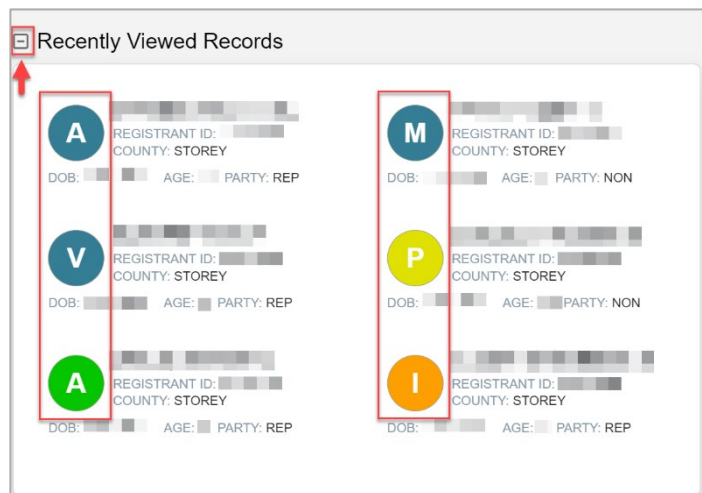
Messages posted by county administrators are visible to all users within that same county. Messages posted by state administrators are visible to all state and county users.



## Recently Viewed Records

The six most recently viewed records and their registration status.

Status	Explanation
<b>A</b> Active	Meets all requirements
<b>A</b> Active-Pending	Registration pending. Eligible to vote with ID and/or proof of residence.
<b>C</b> Cancelled / Challenged	<ul style="list-style-type: none"> <li>▶ Not qualified</li> <li>▶ Voter request</li> <li>▶ Deceased</li> <li>▶ Challenged by another voter in the precinct.</li> </ul>
<b>M</b> Merged	Record cancelled by merge with duplicate
<b>V</b> Void	<ul style="list-style-type: none"> <li>▶ Not qualified</li> <li>▶ Data entry error</li> <li>▶ Returned mail</li> <li>▶ No response to letter</li> </ul>
<b>P</b> Pending	<ul style="list-style-type: none"> <li>▶ Incomplete application</li> <li>▶ Under review</li> <li>▶ Under 18 (P17)</li> </ul>
<b>I</b> Inactive	<ul style="list-style-type: none"> <li>▶ 33-day process</li> <li>▶ Failure to Vote</li> <li>▶ Undeliverable</li> </ul>



## Tasks

Daily/Routine tasks generated by one of four trigger types:

- ▶ TotalVote background processes, e.g., duplicate identification, age change
- ▶ Poll Pad registrations during an election
- ▶ Automated data feeds from DMV, NOVA, NCOA, ERIC, etc.
- ▶ Voter Registration actions

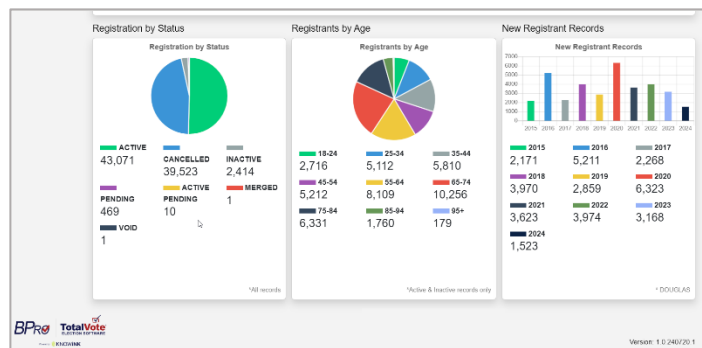
See Appendix: Tasks.

Task ID	Task Name	Action
1	Registered Voters with no Precinct Split	
2	Residence Addresses to Verify	Purge Voters
168	Possible Duplicate Registrants - In County Matches	
324	Possible Duplicate Registrants - Out of County Matches	
3	Third Party Registration - Manual Processing	Process Next
10	Same Day Registration - Update	
3	Third Party Registration - Provisionals	
3	Voter Responded to Notice	Review All
10	Pending Under 18	Process All

## Voter Registration Stats

Visual representations of the county's voter registration statistics.

- ▶ Registrations by Status
- ▶ Registrants by Age
- ▶ New Registrants by Year

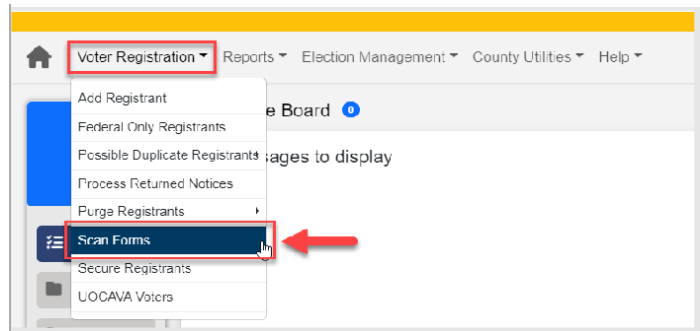


## Processing Voter Signature Cards

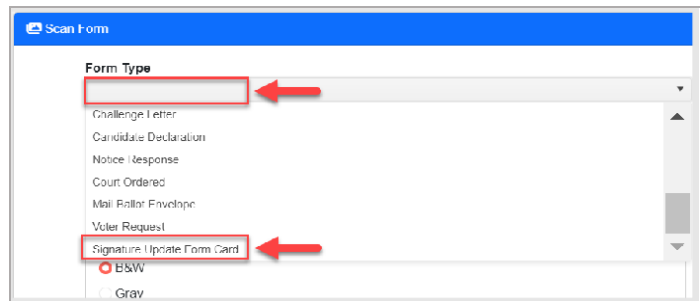
As part of the TotalVote rollout, the Secretary of State had new Voter Signature Cards sent to every registered voter in the state. This document covers the steps necessary to process those cards, making the signatures available in TotalVote for ballot signature verification.

### Scanning Cards

From the Navigation Bar, select **Voter Registration > Scan Forms**.



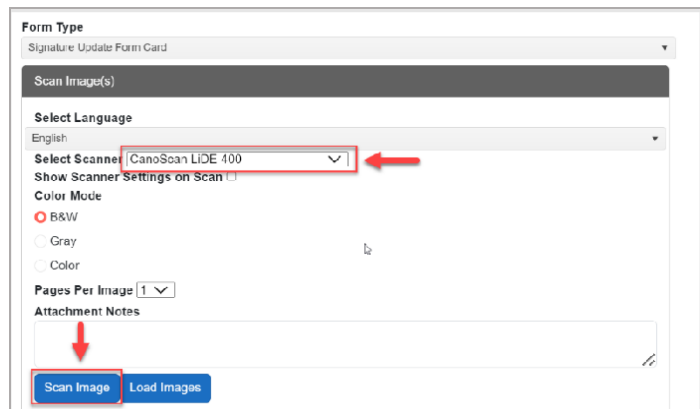
Click into the **Form Type** field and scroll to the bottom of the list to select **Signature Update Form Card**.



If a scanner has already been set up in TotalVote, the scanner will be listed in Select Scanner.

If the scanner has not been set up in TotalVote, contact the VREMS Help Desk for assistance.

With the scanner selected, click **[Scan Image]**.

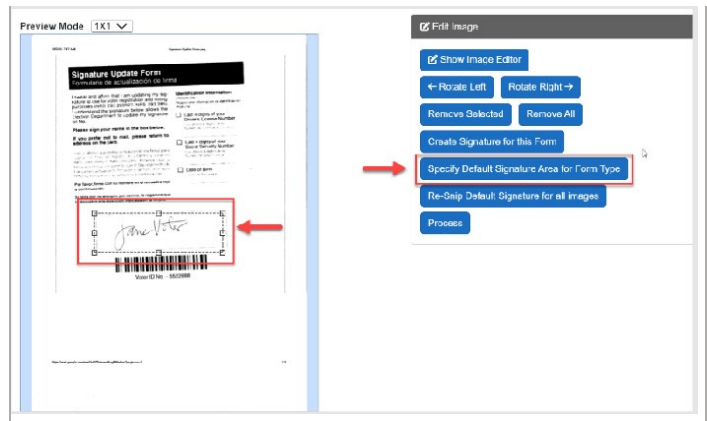




If this is the first scan of that Form Type, drag a rectangle around the signature area.

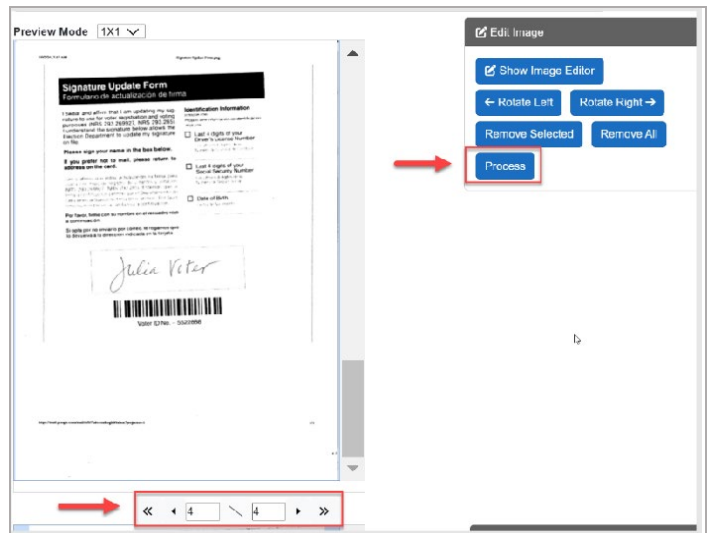
Additional options appear under **Edit Image** if a signature area has been selected.

Click **[Specify Default Signature Area for Form Type]**.



Click **[Scan Image]** to keep scanning until you've completed the batch. The counter increments with each scan.

Click **[Process]** to create a batch.

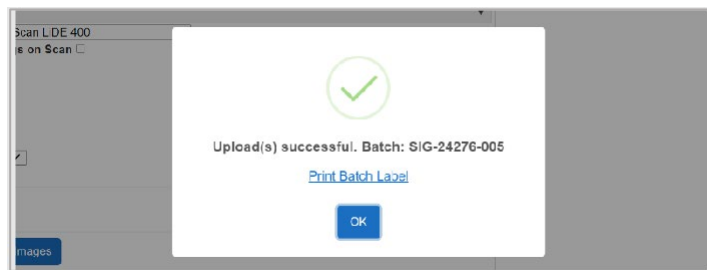


The system displays

**✓ Upload(s) successful** and provides a Batch number.

To print a label for the batch, click [Print Batch Label](#) and follow the prompts to print a label.

Click **[OK]**.

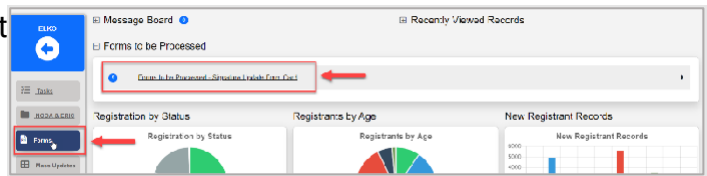


# Attaching Scanned Cards to Voter Profiles

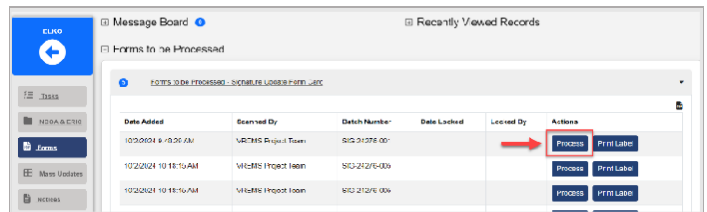
Cards scanned through Scan Forms land in the Forms queue for processing.

From the TotalVote Dashboard, select **Forms** on the left task bar.

Select the **Forms to be Processed – Signature Update Form Card** queue.

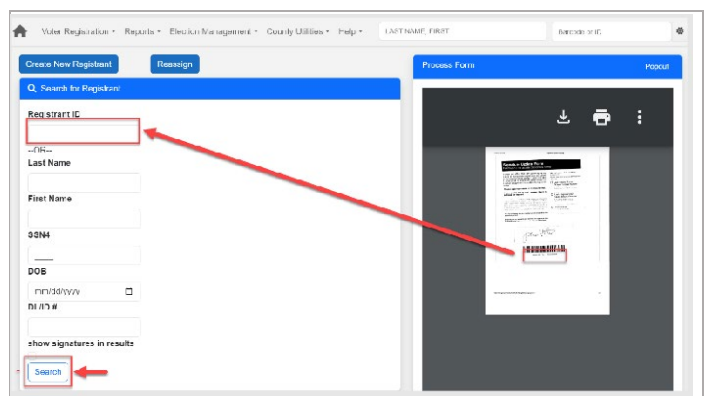


Each scanned card is an item in the queue. Select one and click **[Process]**.



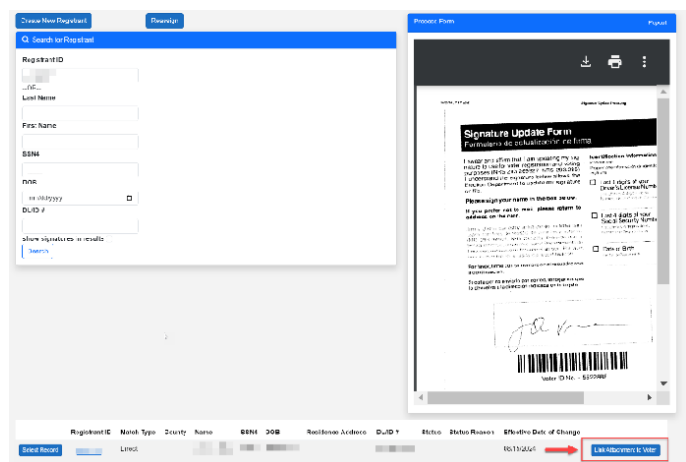
An image of the form is displayed.


Enter the **Voter ID No.** from the form into the **Registrant ID** search field and click **[Search]**.



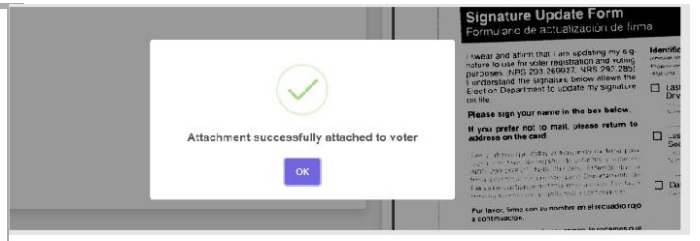
The matching profile is displayed at the bottom of the screen.

Confirm basic details and click **[Link Attachment to Voter]**.




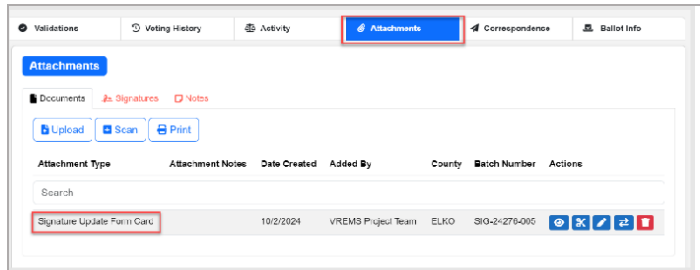
TotalVote displays   
**Attachment successfully**  
**attached to voter.**

Click **[OK]**.





The voter's profile is displayed.

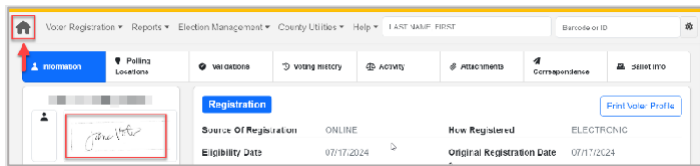
Note that the Signature Update Form Card can now be viewed in the profile on the  **Attachments** tab.



Note that the newly scanned signature is displayed as the default.

Click the  **Home** icon to return to the TotalVote Dashboard.

Select the  **Forms** queue to continue processing Signature Cards.



## Appendix: Notices

- Deceased Confirmation Notice
- Moved out of Jurisdiction
- AVR - Missing Signature
- Missing Signature
- Cancel Confirmation
- Citizenship Box Marked No
- Citizenship Box Not Checked
- Felony Notice
- Confidential Confirmation Notice
- Voter ID Cards
- Homeless
- Confirmation Notice
- Missing ID
- Missing Party
- Special Status Notice
- P17 Notice
- Special Status Notice
- Residence Invalid
- Voter Notification Card
- State MB Signature Challenge
- Nevada Mail Ballot Missing ID Affidavit
- Nevada Mail Ballot Signature Cure Affidavit
- Nevada Voter Signature Cure Instructions
- Nevada UOCAVA Missing Unsigned Declaration
- Multiple Incomplete Notice
- Address Confirmation
- Secured Voter Confirmation Notice

## Appendix: Tasks

- Deceased
- Failure to Timely Respond to Notice
- Pending Under 18 (P17 status registrants)
- Possible Duplicate Registrants – In County Matches
- Possible Duplicate Registrants - Out of County Matches
- Registered Voters with no Precinct Split
- Residence Addresses to Verify
- Third Party Registration – Manual Processing (DMV, NOVA and other agency registrations)
- SDRU Initial
- Same Day Registration – Update (Poll Pad SDRU registrations)
- Third Party Registration – Provisionals (Poll Pad SDR Provisional)
- Voter Responded to Notice

## County Daily and Monthly Task Overview

This document lists the most common tasks that counties will handle through TotalVote and identifies the TotalVote menu/function used to complete those tasks. Links to helpful documents available in the NevadaVote KB are included.

### Daily/Frequent Tasks

#### NevVoter.nv.gov Data/HAVA Services

- Update voter profiles in TotalVote using information from NevVoter reports:
- DMV Unmatched Report
- Duplicate Report
- Ineligible Voters Report
- Validation Errors Report
- Vital Statistics Report -Deceased (see [Processing Deceased Notices](#))
- NOVA Cancellation Requests

#### Tasks

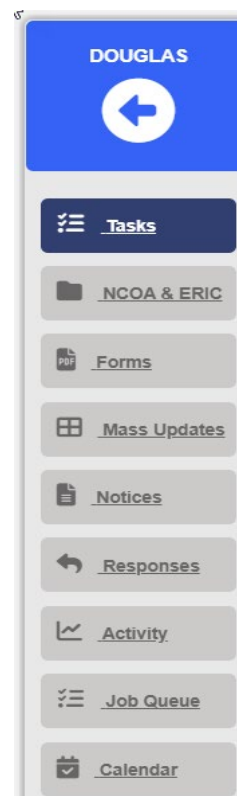
- Third Party Registrations (NOVA/AVR/DMV) ([Processing AVR and NOVA Registrations](#))
- Possible Duplicates
- Voter Responded to Notice

#### NCOA/ERIC

- NCOA In-State Review
- NCOA Cross-State Review
- ERIC In-State Review
- ERIC Cross-State Review

#### Forms

- Voter Registration > Scan Forms
  - Federal Post Card Application
  - Voter Registration Application
  - Opt Out Mail Ballot
  - Address Verification / NCOA Address Verification Notice
- Forms > Forms to be Processed (from Scanned Forms)
- Voter Registration > Process Returned Notices (see [Processing Returned Notices](#))
  - Undeliverable
  - Voter Responded



## Notices see [Processing and Sending Unsent Notices](#)

- Voter Notification
- Address Confirmation
- Missing VRA Notices (ID, DOB, Party, signature, etc.)
- P17 Notice
- Failure to Vote
- Special Status/Renewal Notice (UOCAVA)
- Confidential Confirmation ([Managing Protected Voters](#))
- Moved Out of Jurisdiction

## Job Queue

- Create Mailing batch
- Report Builder Reports

## Monthly/Infrequent Tasks

### TotalAddress [Managing Addresses in TotalVote](#)

- Adding/updating addresses
- Entering/updating commercial addresses

## Reports

- Stats Report (IPSwitch)
- Opt-Out Mail Ballot Preferences
- Precinct Level Reporting
- Public Information Request

## Voter Registration > Purge Registrants

- Failed ID Check
- Inactive
- Invalid Address

## Database Checks (Database Development Pending)

- Felony
- Declared Incompetent

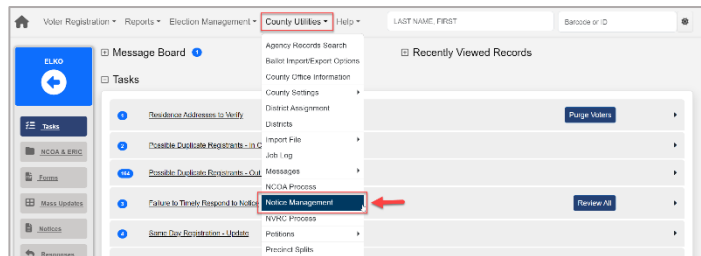
## Setting Up Notices

This document describes how to set up Notices using existing templates.

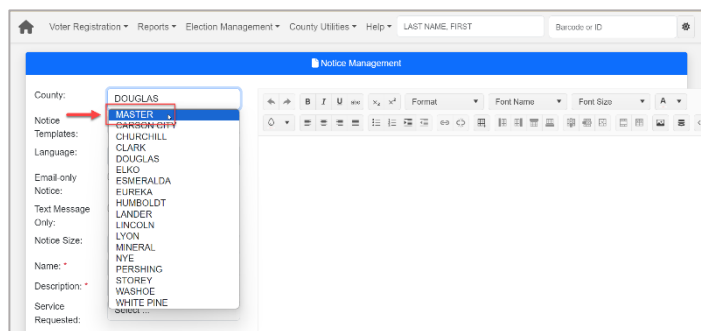
**Note:** The County Seal and Clerk Signature image files must be uploaded to image manager (see *Setting Up County Information*) to complete this process.

## Creating County Templates from a State Master

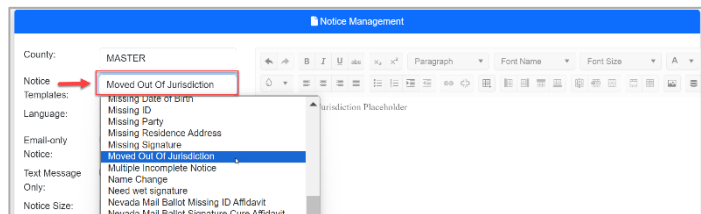
From the Navigation bar, select **County Utilities > Notice Management**.



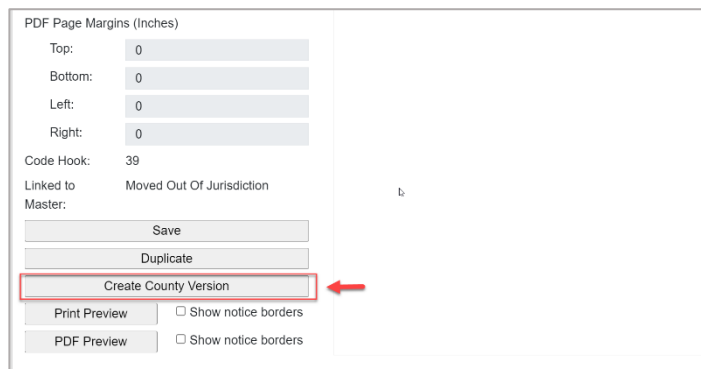
Click on the County name and scroll up to select MASTER.



Click into the **Notice Templates:** field and select from the list of master templates.



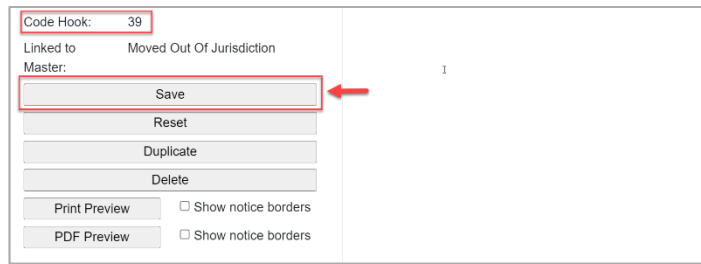
Scroll to the bottom of the template setup screen and select **[Create County Version]**.



The **County:** field now displays the county name and **Notice Templates:** displays the template name.

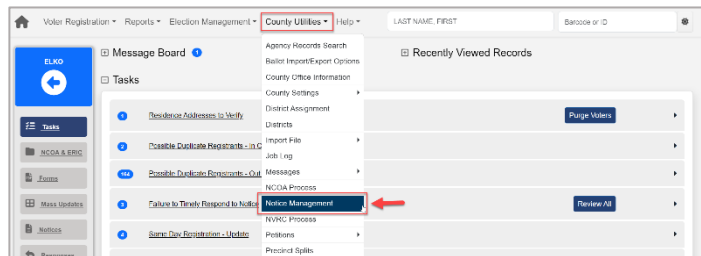
Scroll to the bottom and **[Save]**.

**Note:** The **Code Hook** should be displayed. If no Code Hook is displayed, contact the VREMS Help Desk for assistance.

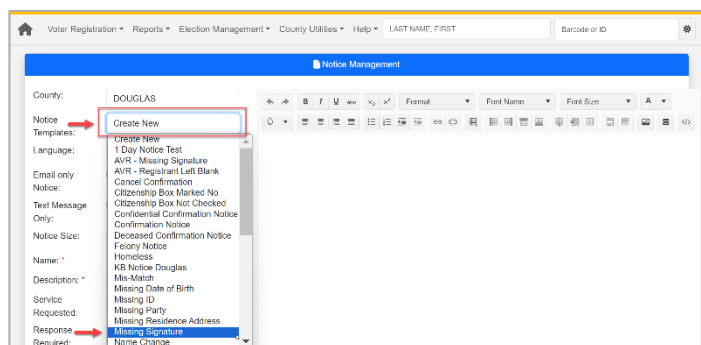


## Modifying an Existing Template

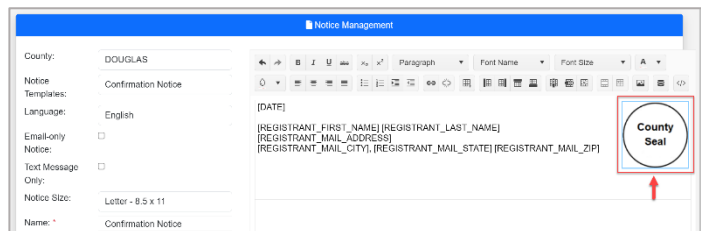
From the Navigation bar, select **County Utilities > Notice Management**.



Click into the **Notice Templates** dropdown list and select one of the existing notices.

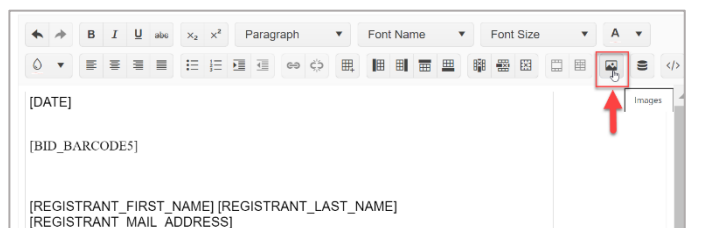


The **Notice** is displayed with several merge fields already set up. Delete the placeholder **County Seal**.



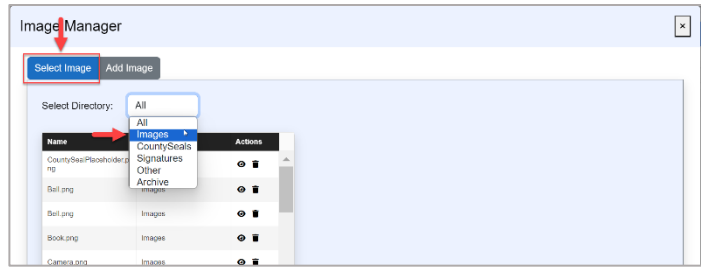
Place the cursor where the county seal belongs and click the **Images** icon.

Note that when you hover over the icon, the **Images** label is displayed.

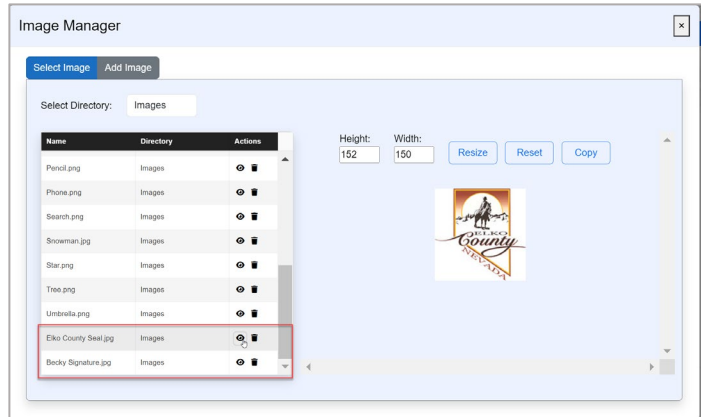




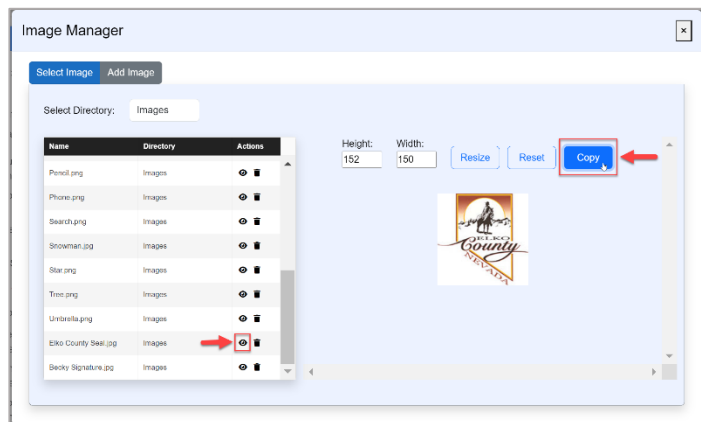
The Image Manager opens with the image focus on **[Select Image]**. Open the **Select Directory:** dropdown and choose **Images**.



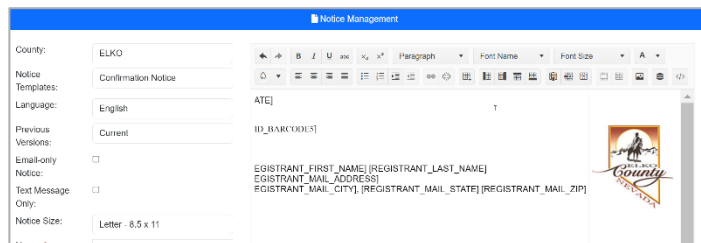
Scroll to the bottom of the list to find the images most recently uploaded. Select the County Seal and click the **👁** eye icon to view it.



Click **[Copy]** to copy the image to the clipboard and then close the Image Manager by clicking **✕** in the upper right corner.



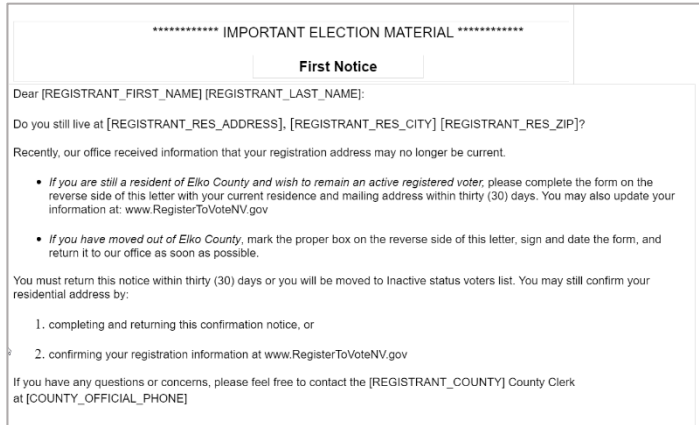
With your cursor in position in the notice template, use **[Ctrl]-[V]** to paste the image from the clipboard.




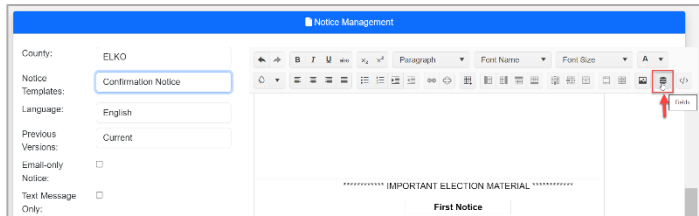
Scroll to the bottom and **[Save]**.  
**Note: Code Hook** and **Linked to** information should be visible for templates that generate automatic notices. Contact the VREMS Help Desk if **Code Hook** and **Linked to** are blank for a Confirmation Notice.



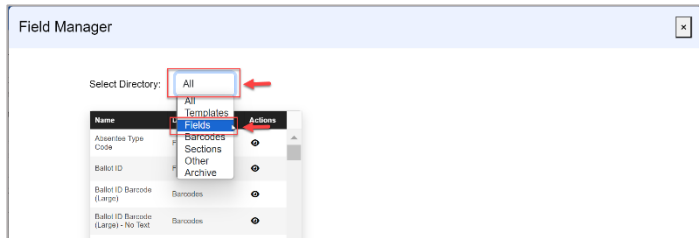
Open the notice again to make any formatting or text updates.  
 If you have access to existing notice text, copy and paste the text into the body of the Notice message.




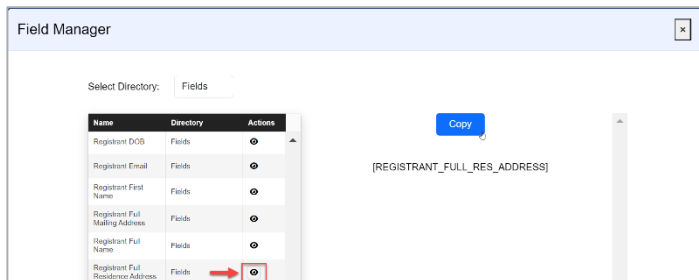
To add additional merge fields to the notice, select the  Fields icon.




The Field Manager screen is displayed. Open the **Select Directory:** dropdown and select **Fields**.

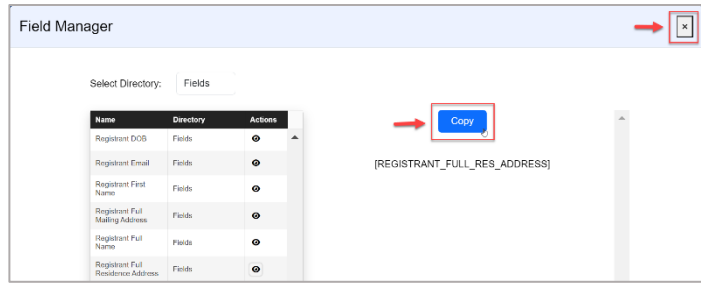


Scroll through the list and click the  view icon to view the field.

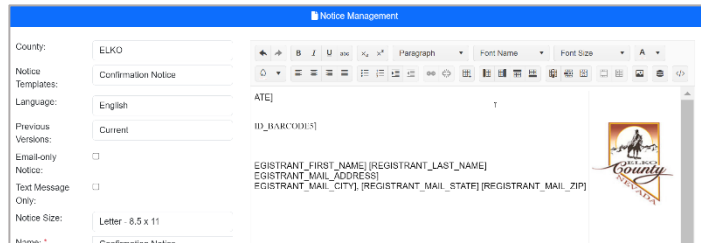


Click **[Copy]** to copy the field to the clipboard.

Close the Image Manager by clicking  in the upper right corner.



With your cursor in position in the notice document, use **[Ctrl]-[V]** to paste the field from the clipboard.



Scroll to the bottom and **[Save]**.  
**Note: Code Hook and Linked to** information should be visible for templates that generate automatic notices. Contact the VREMS Help Desk if **Code Hook** and **Linked to** are blank.



## Code Hook Reference

This document identifies the connection between specific Voter and Ballot Statuses, and the associated business rules-related code hooks that generate Notices.

### Voter Status Triggers

Voter Status selections and Status Reasons trigger specific Notices based on the associated Code Hooks. Notices without Code Hooks can be sent manually.

Voter Status > Status Reason	Master Notice Template	Code Hook
Add Registrant > <b>Active</b>	Voter Notification Card	26
<b>Active</b> > 33 Day Process	Address Confirmation	35
<b>Pending</b> > Incomplete > Missing DOB	Missing Date of Birth	21
<b>Pending</b> > Incomplete > Missing Signature	Missing Signature	20
<b>Pending</b> > Incomplete > Missing ID	Missing ID	22
<b>Pending</b> > Incomplete > Missing Party	Missing Party	24
<b>Pending</b> > Incomplete > Missing two or more of the following: <ul style="list-style-type: none"> <li>• Signature</li> <li>• DOB</li> <li>• ID</li> <li>• HAVA</li> <li>• Party</li> </ul>	Multiple Incomplete Notice	41
<b>Pending</b> > Incomplete > Missing Physical Address	Missing Residence Address	23
<b>Pending</b> > Incomplete > Citizen Marked No	Citizenship Box Marked No	43
<b>Pending</b> > Under 18	P17 Notice	37
<b>Cancelled</b> > Voter Request	Cancel Confirmation	36
<b>Cancelled</b> > Deceased	Deceased Confirmation Notice	5
<b>Active</b> > Failure to Vote	Failure To Vote	45

### Vote Profile Flag Triggers

Voter Status > Status Reason	Master Notice Template	Code Hook
UOCAVA <input checked="" type="checkbox"/> > (select Type)	Special Status Notice	38
Suppression Level <ul style="list-style-type: none"> <li>• Standard Secure</li> <li>▶ Court Ordered</li> </ul>	Confidential Confirmation Notice	40

## Ballot Status Triggers

All Ballot Status reasons that triggered both Nevada Mail Ballot **Signature Cure Affidavit** (code hook 46) AND Nevada Voter **Signature Cure Instructions** (code hook 47) prior to Go-Live will only trigger the Nevada Mail Ballot **Signature Cure Affidavit** (code hook 46) going forward.

Counties should customize the **Nevada Mail Ballot Signature Cure Affidavit** (code hook 46).

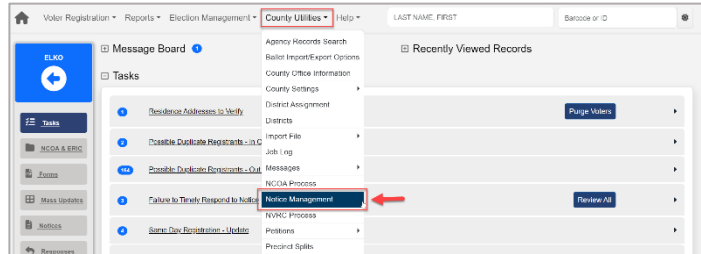
Ballot Status > Status Reason	Master Notice Template	Code Hook
Rejected > No Signature	NV Mail Ballot Signature Cure Affidavit	46
Rejected > Signature Does Not Match	NV Mail Ballot Signature Cure Affidavit	46
Rejected > Signature Swap	NV Mail Ballot Signature Cure Affidavit	46
Rejected > No Signature on File	NV Mail Ballot Signature Cure Affidavit	46

## Setting Up County Information

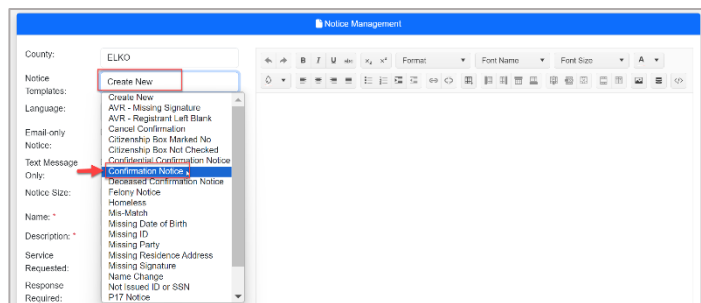
Information contained in the County Profile in TotalVote is used in a variety of system-generated notices and correspondence. This document describes how to set up the County Office Information and upload the County Seal and Clerk's Signature.

### Uploading the County Seal and Clerk's Signature

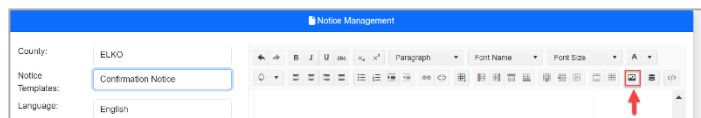
From the Navigation bar, select **County Utilities > Notice Management**.



Click into the **Notice Template** dropdown list and select **Confirmation Notice**.



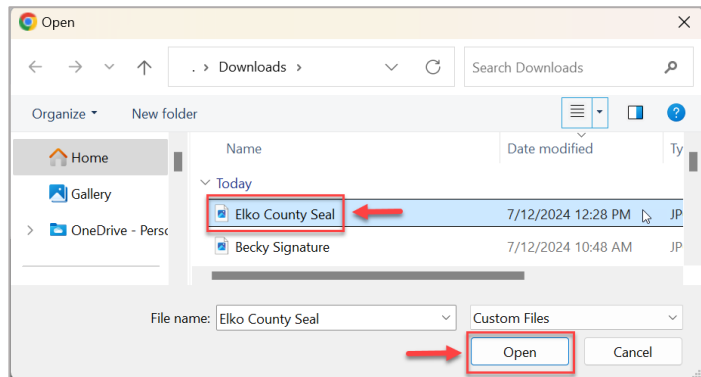
Select the  Images icon.



Change the image focus to **[Add Image]** and click **[Choose File]**.



Navigate to the file to select it and click **[Open]**.




With the file name showing, click **[Upload]**.



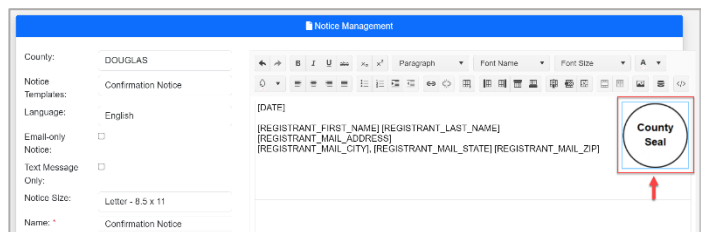
After uploading the image, the system returns to the **Image Manager** screen. Repeat the process to select and upload the Clerk's signature image.




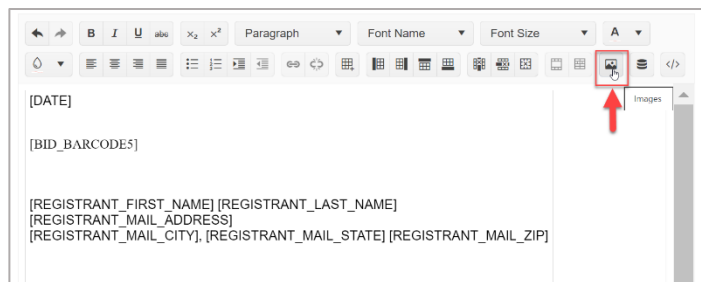
After both images have been uploaded, close the **Image Manager** by clicking on  in the upper right corner.



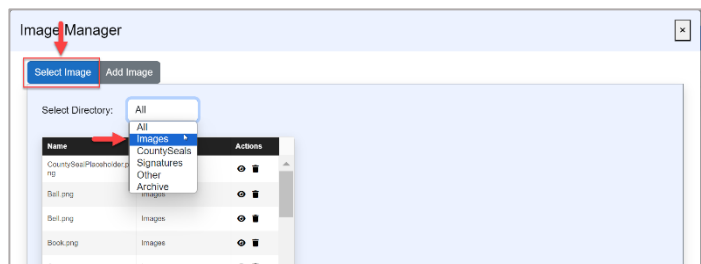
The **Confirmation Notice** is again visible. Delete the placeholder County Seal.




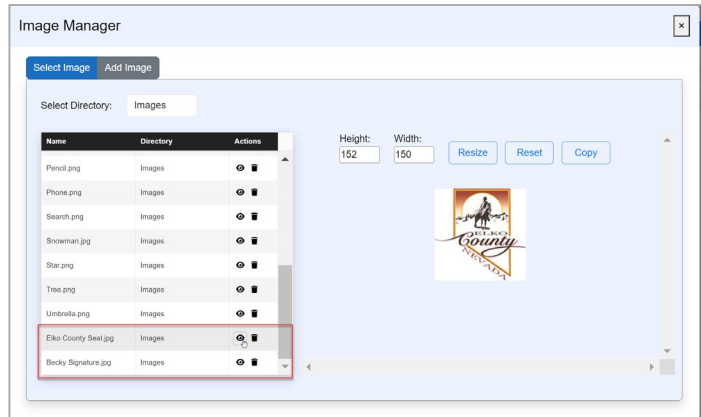
With your cursor where the county seal belongs, click the  **Image** icon. **Note** that when you hover over the icon, the Images label is displayed.




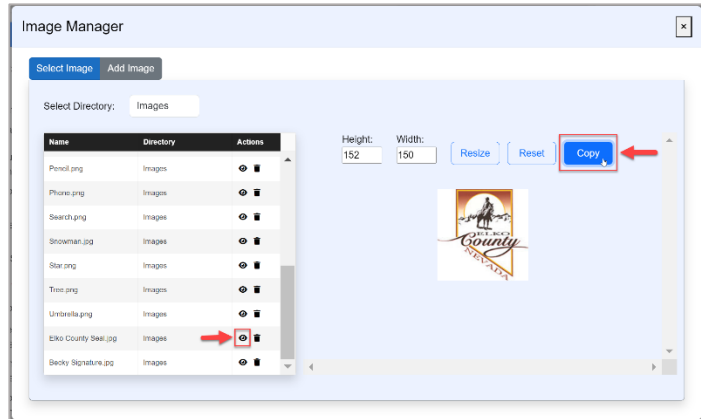
The Image Manager opens with the image focus on **[Select Image]**. Open the **Select Directory:** dropdown and choose **Images**.



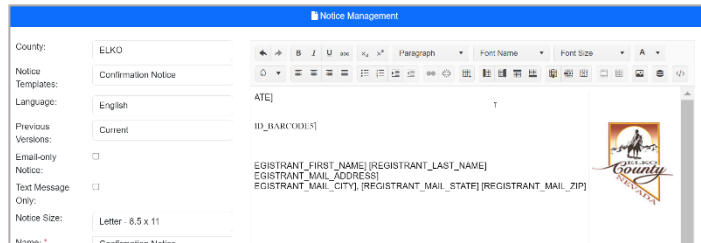
Scroll to the bottom of the list to find the images most recently uploaded.  
Select the County Seal and click the  eye icon to view it.



Click **[Copy]** to copy the image to the clipboard.  
Close the Image Manager by clicking  in the upper right corner.



With your cursor in position in the notice document, use **[Ctrl]-[V]** to paste the image from the clipboard.



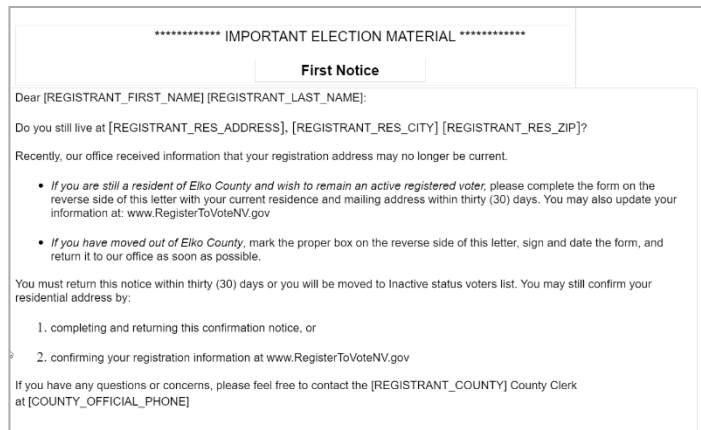
Scroll to the bottom and **[Save]**.  
**Note: Code Hook and Linked to** information should be visible for templates that generate automatic notices. Contact the VREMS Help Desk if **Code Hook** and **Linked to** are blank.





Open the Confirmations notice again to make formatting or text updates.

If you have access to existing Confirmation notice document, copy and paste the text into the body of the Notice message.



## Entering County Office Information

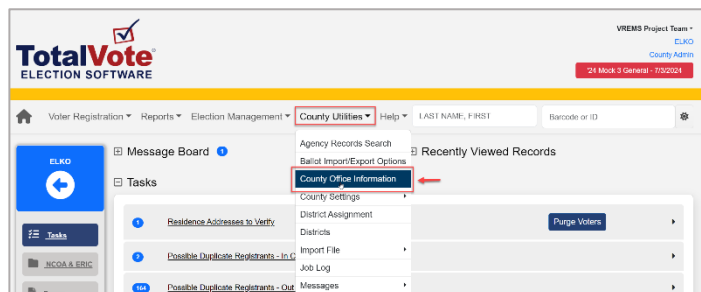
If all voter and elections correspondence goes out under the Clerk's name and signature, update and complete the County Clerk profile already established in TotalVote.

If some voter or elections correspondence goes out under another official's name and signature, create profiles for each of those officials.

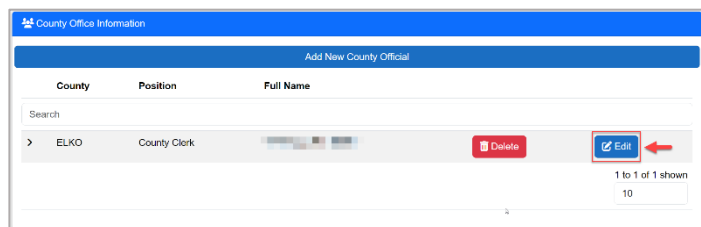
**Note:** TotalVote uses **the last County Official entered** as the source for information in automated Notices. If counties have more than one official to include in TotalVote, **enter the Clerk's information LAST**. Alternatively, counties may opt to **enter ONLY the Clerk's information** at this time.

From the Navigation bar, select **County Utilities > County Office Information**.

The County Office Information screen appears with a placeholder entry for the County Clerk.



From the County Office Information screen, select **[X] Edit**.



Enter location and contact information and **[Save]**.

### Essential Fields

(may impact automatic notices):

- First Name
- LastName
- Office Physical Address, City, State, Zip
- Office Mailing Address (if applicable)
- UOCAVA Email

**Edit County Official**

County: ELKO  
Position: County Clerk

First Name: REBECCA (BECKY)  
Last Name: PLUNKETT  
Office Physical Address: 550 COURT ST, 3RD FLOOR  
City: ELKO  
State: NV Zip: 89801

Office Mailing Address: Mailing City, Mailing State, Mailing Zip

Office Phone: 775-753-4600  
Toll-Free Number, Fax, TDD

Website: https://www.elkocountynv.net/departments/clerk/elections.php  
Public-Facing Email: bplunkett@elkocountynv.net  
UOCAVA Email: election@elkocountynv.net  
UOCAVA Reply To Email: election@elkocountynv.net  
Seal: Choose File | No file chosen  
Clerk Signature: Choose File | No file chosen  
Office Hours

**Save** **Cancel**

Add the County Seal and Clerk Signature. Click **[Choose File]**. Navigate to the locate the Seal file and click to select it. Click **[Open]**.

File name: Elko County Seal  
**Open** **Cancel**

Seal: Choose File | No file chosen

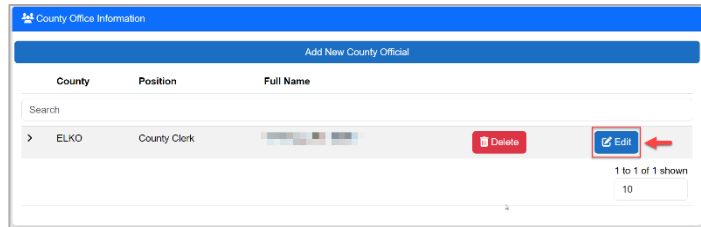
With Signature and Seal file names displayed, click **[Save]**.

Seal: Choose File: Elko County Seal.jpg  
Clerk Signature: Choose File: Becky Signature.jpg  
Office Hours

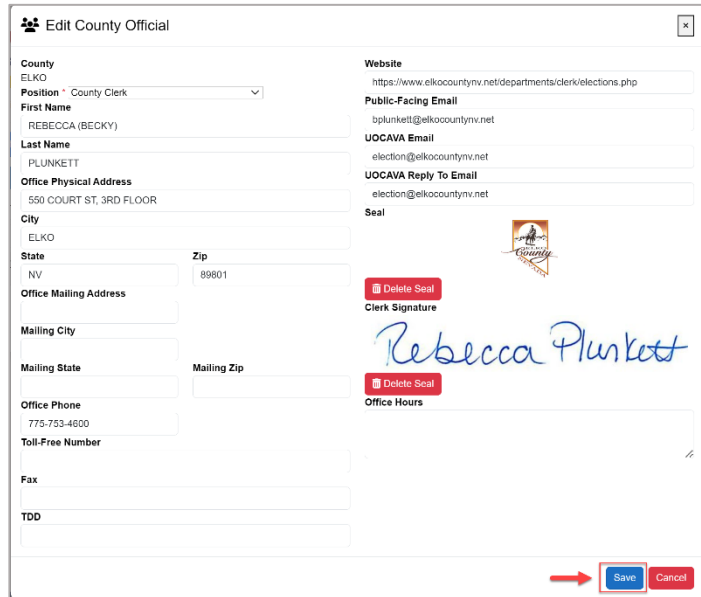
**Save** **Cancel**

From the Navigation bar, select **County Utilities > County Office Information**.

Return to the **County Office Information** screen by selecting **[Edit]**.



Confirm the **County Seal** and **Clerk Signature** are displayed. Made any additional edits and **[Save]**.



## Processing Third Party Applications

Voter registrations that are submitted somewhere other than a county elections office are considered Third Party registrations. Examples include applications submitted online through Nevada Online Voter Access system (NOVA), automatically through DMV as part of driver licensing, and through other Nevada agencies.

This document describes how to process Third Party Applications and associated voter notifications in TotalVote.

Registration applications and updates submitted through NOVA, DMA and other Nevada agencies are transferred into TotalVote multiple times throughout the day.

New applications and registration updates that include all legally required information are processed automatically. Their status in TotalVote is Active-Active and **Voter Notification Cards** are triggered automatically. Counties process the resulting **Voter Notification Cards** from the Notifications queue.

Registrations that do not meet all of requirements start in the **Third-Party Registration – Manual Processing** queue where the county determines the voter status and generates applicable notice(s) indicating what details the registrant must provide to complete the registration process.

Counties will have different steps to respond to Third Party queue applications depending on whether the registrant is a new or existing voter, and if a Political Party is selected.

Once processed in TotalVote, the information is available in NOVA beginning the following day.

Criteria for Automatic Processing  
Registrations that include the following information are passed directly into TotalVote in Active-Active status:

- ▶ Full name
- ▶ Date of Birth
- ▶ NV DL or NV ID or SSN validated against DMV data
- ▶ Residential Address confirmed by TotalAddress
- ▶ Signature
- ▶ US citizenship - Yes
- ▶ 18 years of age or older

## Automatically Processed Third Party Applications

Voter Registration applications that include all required information are processed automatically in TotalVote and are designated Active-Active status voters.

- New applications and updated registrations with a designated Political Party trigger a **Voter Notification Card**.
- New applications with no designated Political Party are set to No Political Party and trigger a **Voter Notification Card** and a **Missing Party Notice**.
- Registration updates where Political Party was left blank retain the party designation from the most recent registration and trigger a **Voter Notification Card**.

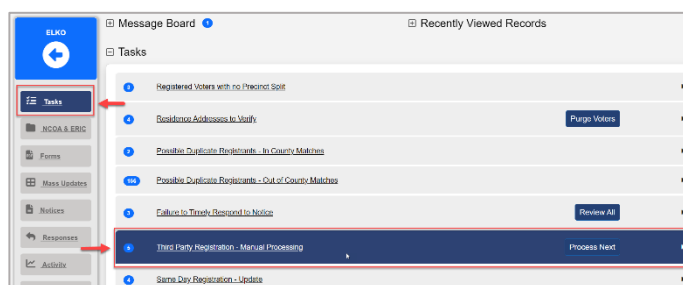
Auditing Registration Activity for ways to create an audit trail for automatically processed registrations.


## Manually Processed Third Party Applications

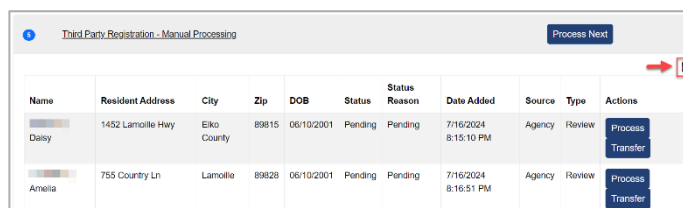
Voter registration applications missing required information are assigned to the **Third-Party Registration – Manual Processing** queue for county processing.

To create an audit trail for manually processed registrations, export a list of registrants in each Task Queue before processing. Queues are updated frequently. To be useful, a Task queue should be exported immediately before processing the voters in that queue.

From the TotalVote Dashboard, choose **Tasks > (Task Queue Name)**.



Click  in the upper right corner of each Task queue.



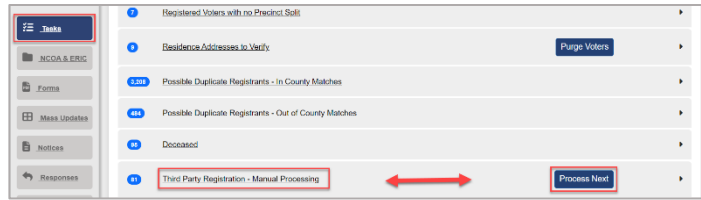
To view the file, locate it in the Downloads folder and double click to open it.

Consider renaming the export file to include the date and a sequence (if exported more than once/day), e.g., 2024-09-03\_third-party\_01.

The screenshot shows an exported CSV file with the following columns: Name, Resident Address, City, Zip, DOB, Status, Status Reason, Date Added, Source, Type, and Actions. The data is as follows:

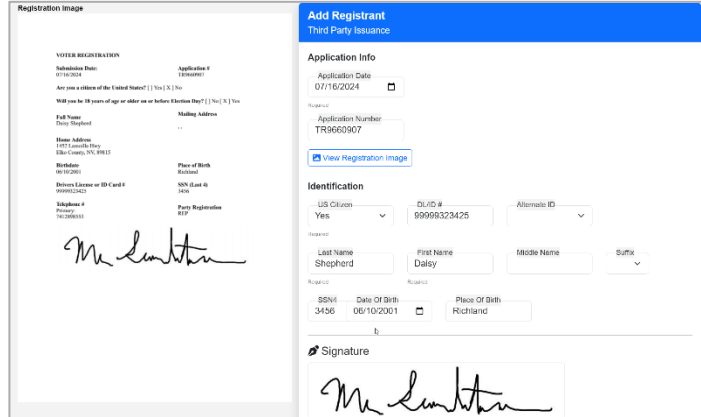
1	Name	Resident Address	City	Zip	DOB	Status	Status Reason	Date Added	Source	Type	Actions
2	Shepherd	Lamoille Hwy	Elko County	89815	6/10/2001	Pending	Pending	7/16/2024 20:15	Agency	Review	Review
3	Donaldson	Country Ln	Lamoille	89828	6/10/2001	Pending	Pending	7/16/2024 20:16	Agency	Review	Review
4	Joe	BOUGAINVILLEA DR	MINDEN	89423	4/10/2006	Pending	Pending	7/16/2024 22:13	Agency	Review	Review
5	Kevin	DOWNS DR	MINDEN	89423	2/4/2000	Pending	Pending	7/16/2024 22:42	NOVA	Review	Review
6	Kevin	DOWNS DR	MINDEN	89423	2/4/2000	Pending	Pending	7/16/2024 22:42	NOVA	Review	Review

Select **Tasks > Third Party Registration – Manual Processing**. Click **[Process]** to open the first registration. Or **[Process Next]**.



The **Add Registrant – Third Party Issuance** screen appears with a Registration Image to the left containing information from the registrant’s DMV/Online registration.

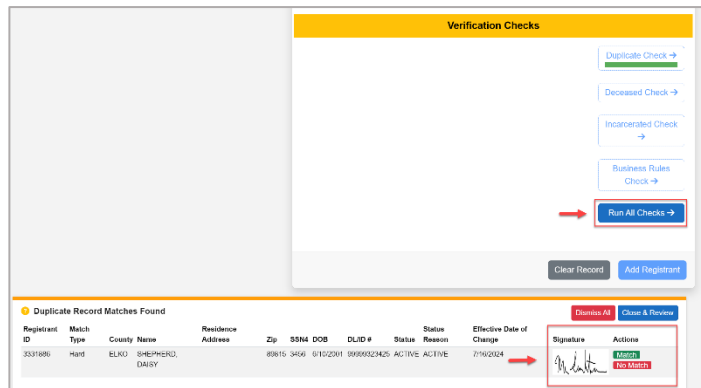
**Note:** If two users attempt to process the same registration, the system warns, “This item is checked out by [username]. Do you want to process this application anyway?”



Before updating any fields, scroll to the bottom and **[Run All Checks]**

If Duplicate Check locates a suspected match, the system returns **Duplicate Record Matches Found**.

Review the information in the proposed duplicate record and select **Match** or **No Match**.



After reconciling any duplicates, scroll to the top and confirm/correct all dates.

Confirm the **Residence Address** is **Verified** and shows a **Precinct Split**.

**If the profile shows Residence Address Unverified**, confirm the address does not have a typo and is within the county.

**If the residence is within the county**, re-type the street address into the Address field, pausing as the system lists address matches. Select the standardized address. The profile will show Residence Address **Verified**.

**If the residence is not within the county**, return to the Task Queue, click **[Transfer]**, select the correct county from the list, and **[Transfer]**.

Name	Resident Address	City	Zip	DOB	Status	Status Reason	Date Added	Source	Type	Actions
[Redacted]	[Redacted]	SPARKS	89441	02/11/1969	Pending	Pending	5/30/2024 9:12:54 AM	Agency	Review	Process, Transfer
[Redacted]	[Redacted]	Carson City	89706	04/19/2000	Pending	Pending	8/10/2024 7:39:57 PM	Agency	Review	Process, Transfer
[Redacted]	[Redacted]	CARSON CITY	89706	02/11/1985	Pending	Pending	6/14/2024 9:16:02 AM	Agency	Review	Process, Transfer

1 Confirm a **Political Party** is listed.

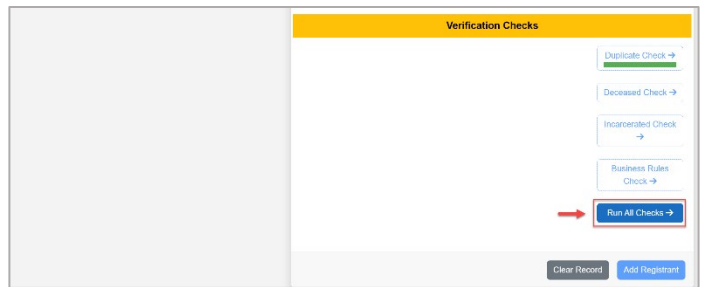
**If no party was identified and the voter is a new registrant**, the record will show Other > RLB in **Political Party**.

Change the party to **No Political Party** and send the voter a **Missing Party** notice.

2 If all legally required information has been provided, set the Registration Status to **ACTIVE** and Status Reason to **ACTIVE**.

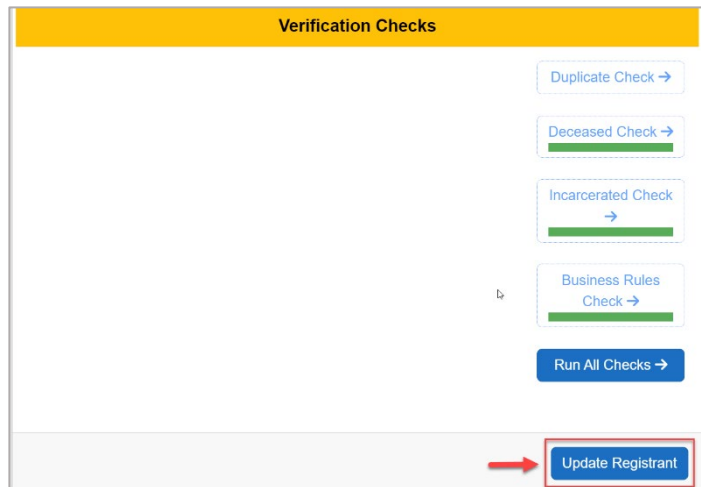
3 If the application was signed, toggle **Document is Signed** to  On.

Click **[Run All Checks]**

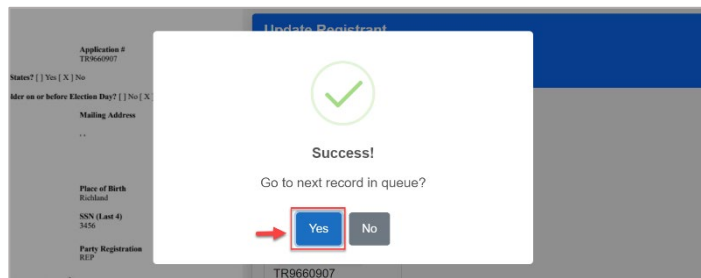


Address any deficiencies identified and **[Run All Checks]** again. After all checks pass, click **[Add Registrant]** or **[Update Registrant]** if a duplicate was merged as part of the process.

**Important:** To save changes to the voter profile, you MUST click **[Add Registrant]** or **[Update Registrant]**.



The system prompts Success! A **Voter Notification Card** is generated automatically and can be found in the **Unsent Notices** queue on the Dashboard as well as the **Correspondence** tab of the voter profile. Clicking **[Yes]** loads the next record in the queue.



### Manually Generating the Missing Party Notice

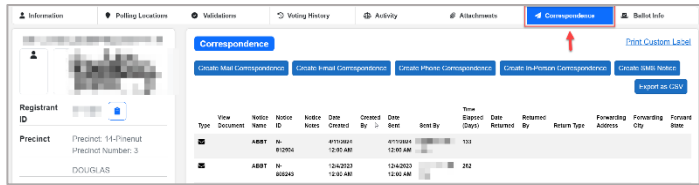
**IMPORTANT:** Registrations in the **Third Party – Manual Processing** queue that are also missing a political party designation must be sent the Missing Party notice. In these cases, the notice must be generated manually.

If the county has added Missing Party to the Multiple Missing Notice, a single notice can be sent.

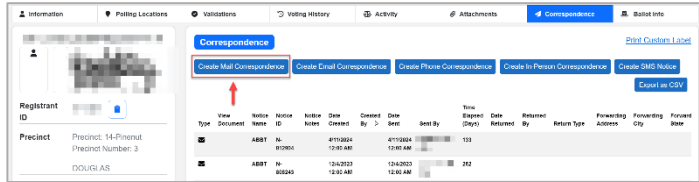
Missing Party notices generated manually can be sent individually or processed in batches from the Notice queue.



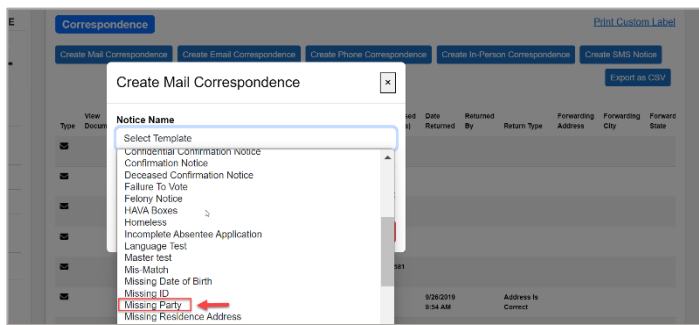
Locate the voter profile and open the **Correspondence** tab.



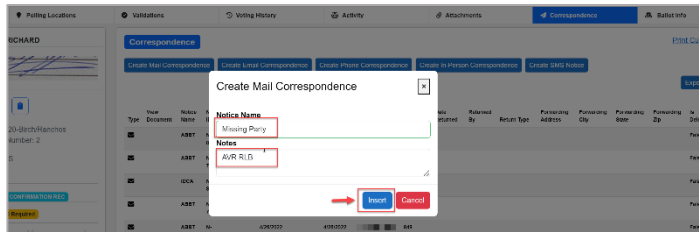
Select **[Create Mail Correspondence]**.



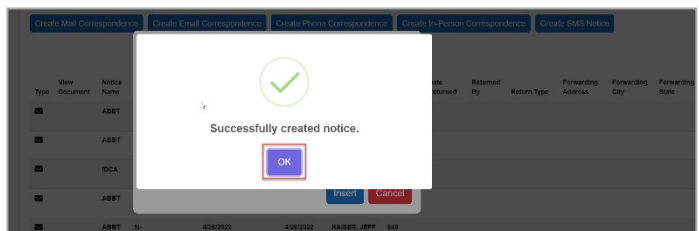
Click into **[Notice Name]** and scroll down to select **Missing Party**.



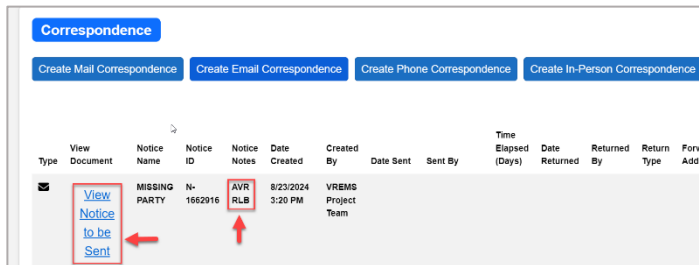
To document the reason for the notice, consider entering AVR RLB in the **Notes** field. Click **[Insert]**.



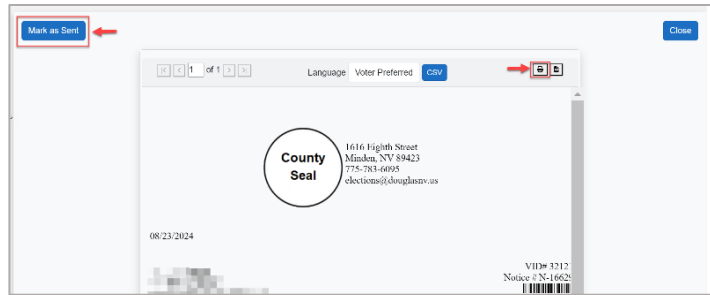
TotalVote generates the notice and prompts "Successfully created notice." Click **[OK]**.



From the Voter profile **Correspondence** tab, select the link **View Notice to be Sent**. Note that the **Notice Notes** column shows AVR RLB.



🖨️ **Print** and mail the notice, then **[Mark as Sent]**.



**Missing Party** notices can also be processed in batches from the **Unsent Notices** queue on the dashboard.

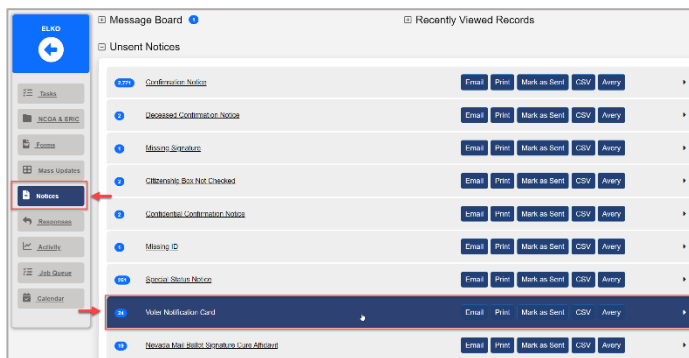


## Processing Voter Notification Cards

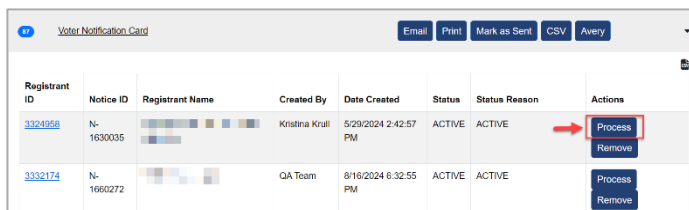
Voter Notification Cards can be processed individually or in batches from the Notices queue on the landing page.

To process the Notice, click **Notices > Voter Notification Card**. To Print all notices in that queue, select **[Print]**. After notices have been printed and mailed, **[Mark as Sent]**.

The notice is recorded as Sent in Voter profile **Correspondence**.

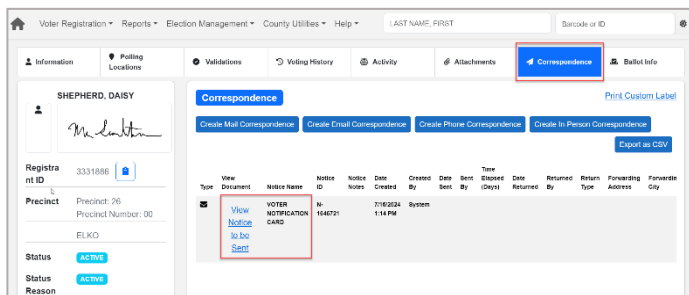


To view or process an individual notice, open the queue, locate the registrant, and click **[Process]**.



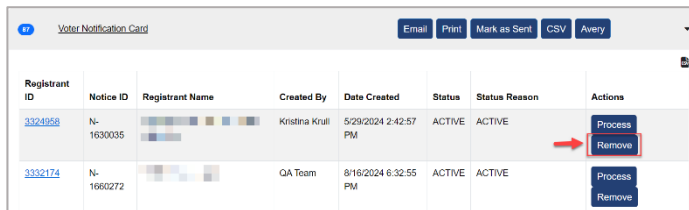
TotalVote opens the voter profile **Correspondence** tab.

The Notice can also be viewed or processed directly from the voter profile **Correspondence** tab without opening Unsent Notices on the dashboard.

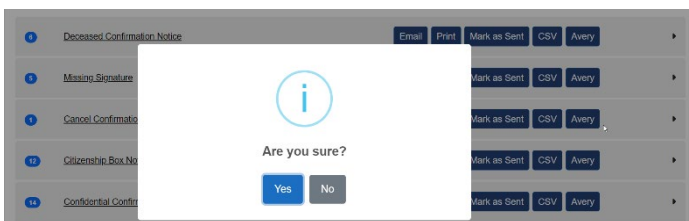


To delete a Notice that is not needed, go to **Notices > Voter Notification Card**.

Open the queue, locate the registrant, and click **[Remove]**.



TotalVote prompts, "Are you sure?" Clicking **[Yes]** removes the notice from the voter profile **Correspondence** record.



## Auditing Registration Activity

Two reports are particularly useful in tracking voter registration activity:

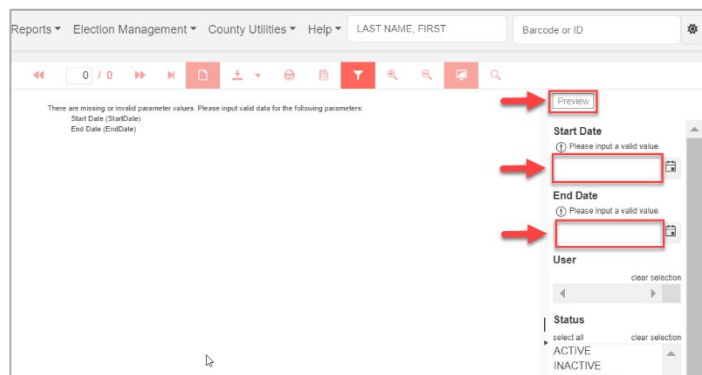
- **Activity Audit Report** tracks changes to voter profiles and who made them.
- **Golden Voter RLB to NPP Report** shows which voter registrations were received without a designated political party and automatically updated to No Political Party.

### Running the Audit Activity Report

From the Navigation Bar, select **Reports > Reports**. Scroll down to **Voter Registration** reports and select **Activity Audit Report**.

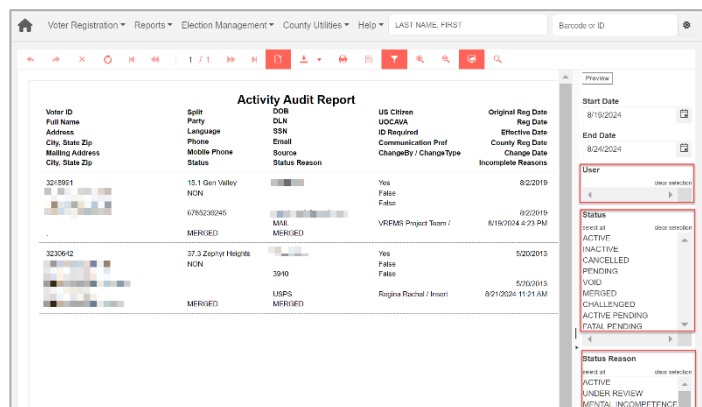


The report will be blank initially. Enter a **Start Date** and **End Date** and click **[Preview]**. The report can be generated daily.



The report lists all voter records modified during that date range. Report results can be narrowed by

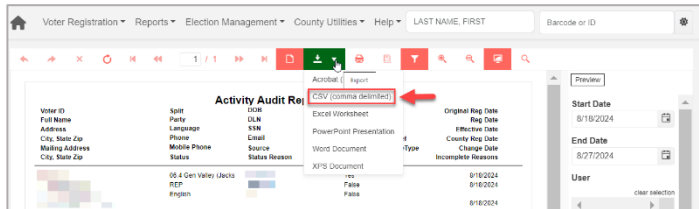
- **TotalVote User**
- **Voter Status**
- **Status Reason**



Automatically processed applications show / **Insert**.  
 Manually processed applications display the **name** of the TotalVote user who processed the application followed by / **Insert**.

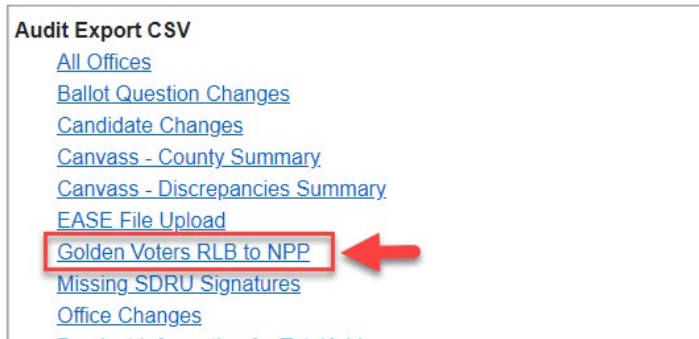
Activity Audit Report					
Voter ID	Split Party	DOB	US Citizen	Original Reg Date	
Full Name	Language	DLN	UOCAVA	Reg Date	
Address	Phone	SSN	ID Required	Effective Date	
City, State Zip	Mobile Phone	Email	Communication Pref	County Reg Date	
Mailing Address	Status	Source	ChangeBy / ChangeType	Change Date	
City, State Zip		Status Reason		Incomplete Reasons	
[Redacted]	24.1 Gen Valley (Topaz)	[Redacted]	Blank	8/20/2024	
[Redacted]	RLB	[Redacted]	False		
[Redacted]	ENG	[Redacted]	False		
	ACTIVE	Agency	/Insert	8/21/2024 5:58 AM	
	ACTIVE	ACTIVE			
[Redacted]	37.3 Zephyr Heights	[Redacted]	Blank	8/20/2024	
[Redacted]	NON	[Redacted]	False		
[Redacted]	ENG	[Redacted]	False		
	ACTIVE	Agency	/Insert	8/21/2024 5:58 AM	
	ACTIVE	ACTIVE			

To sort by voter name, date, or TotalVote user, export to CSV.  
 The file is exported to the Downloads folder.



## Running the Golden Voter RLB to NPP Report

From the Navigation Bar, select **Reports > Reports**.  
 Scroll down to **Audit Export CSV** and select **Golden Voters RLB to NON**.



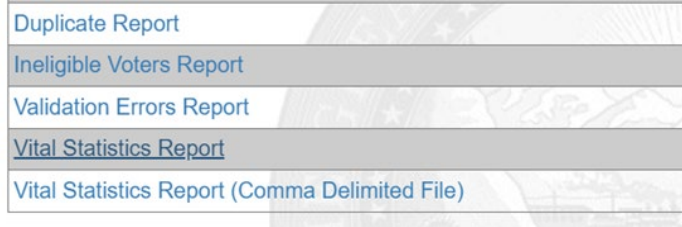
The report is exported to Downloads.  
 This simple export will be replaced with a more robust report in future updates. Until then, the CSV export will pull ALL "golden voters" since go-live. Sorting the report by **Registration Date** will bring the most recent registrations to the top.

VoterID	County	FirstName	LastName	HomeRegAddress	AddressType	P/Party	C/P/Party	Status	StatusReason	RegDate	RegistrationDate
[Redacted]	[Redacted]	[Redacted]	[Redacted]	WINNEMUCCA, NV, 89445	Residential	RLB	NPP	ACTIVE	Agency	8/21/2024 0:00	8/21/2024 0:00
[Redacted]	[Redacted]	[Redacted]	[Redacted]	LOVELOCK, NV, 89419	Residential	RLB	NPP	ACTIVE	Agency	8/20/2024 0:00	8/20/2024 0:00
[Redacted]	[Redacted]	[Redacted]	[Redacted]	WINNEMUCCA, NV, 89445	Residential	RLB	NPP	ACTIVE	Agency	8/20/2024 0:00	8/20/2024 0:00
[Redacted]	[Redacted]	[Redacted]	[Redacted]	WINNEMUCCA, NV, 89445	Residential	RLB	NPP	ACTIVE	Agency	8/20/2024 0:00	8/20/2024 0:00
[Redacted]	[Redacted]	[Redacted]	[Redacted]	LOVELOCK, NV, 89419	Residential	RLB	NPP	ACTIVE	Agency	8/20/2024 0:00	8/20/2024 0:00

# Processing a Deceased Notice

This document covers the process of updating a voter profile to Deceased.

Log in to SOS HAVA Services and click on Vital Stats Report.

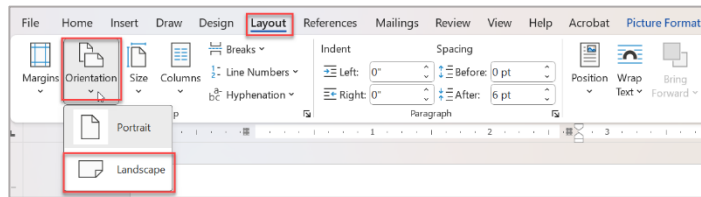


The report opens in a new tab. Use [Ctrl]-[a] to copy the contents of the report. Open a new Word document and use [Ctrl]-[v] to paste the text.

Vital Statistics Report (5/20/2024)  
 Carson City County

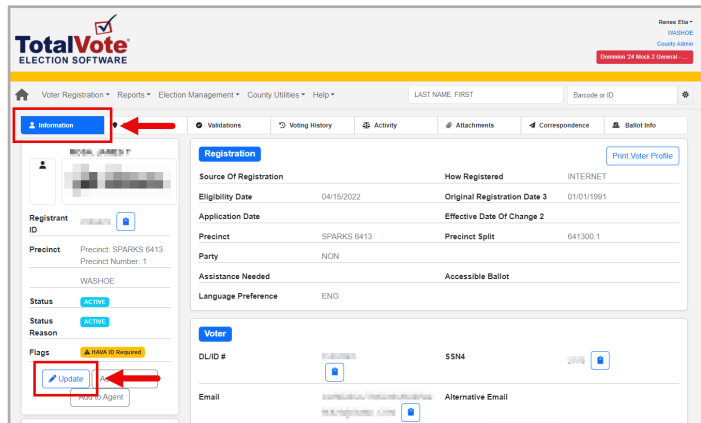
Name	County Voter ID	DMV ID	SSN	DOB	Registration Date	Status	Date of Death	Match Reason
	133983	03862340162	6310	03/20/1951	03/24/2022	A	06/16/2024	First & Last Name, DOB, 4 digit

Set the document layout to Landscape and save the file using the county's naming scheme.

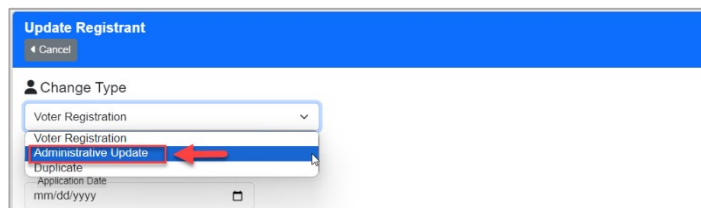


Using Quick Search, locate the **Voter Profile** and click [X] **Update**.

**Tip:** Easily locate the profile by entering the registrant's **date of birth** in MM/DD/YYYY format in the Quick Search **LAST NAME** field.



Set the [X] Change Type to Administrative Update.



Enter the following:

- Source of Registration: Agency
- How Registered: Electronic
- Effective Date of Change: Date of report/death
- Registration Status: CANCELLED
- Registration Status Reason: DECEASED
- Language Preference

Under Office Use Only, click [+ Note].

**NOTE:** Adding a comment in the **Note** field is required if the voter's status was already set to CANCELLED.

Enter any relevant details – date of death, date of HAVA services report, family member report, how the death was verified, etc. Click [Update Registrant].

Confirm the voter status is updated. Note that Comments from the **Note** field are displayed on the **Voter Profile**.

Canceling a deceased voter's registration triggers a **Deceased Confirmation Notice**.

The notice will show in **Notices** queue on the left rail of the Dashboard and in the Correspondence tab of the voter's profile.

Registrant ID	Notice ID	Registrant Name	Created By	Date Created	Status	Status Reason	Actions
N-1641365	N-164829			7/2/2024 11:18 AM	CANCELLED	DECEASED	Process Remove
N-1641365				7/2/2024 10:22:59 AM	CANCELLED	DUPLICATE	Process Remove
N-1641365				7/2/2024 11:17:00 AM	CANCELLED	DECEASED	Process Remove

Type	Document	Notice Name	Notice ID	Notice	Date Created	Created By	Date Sent	Sent By	Time Elapsed (Days)	Date Returned	Returned By	Return Type	Forwarding Address	Forwarding City	Forwarding State	Forwarding Zip	Is Deleted
		DECLARED CONFIRMATION NOTICE	N-1641365		7/2/2024 11:18 AM												False

Counties are not required to send a Deceased Confirmation.

To delete a notice from the Deceased Confirmation Notice queue on the Dashboard, click **[Remove]**.

Registrant ID	Notice ID	Registrant Name	Created By	Date Created	Status	Status Reason	Actions
N-1641365	N-164829			7/2/2024 11:18 AM	CANCELLED	DECEASED	Process Remove
N-1641365				7/2/2024 10:22:59 AM	CANCELLED	DECEASED	Process Remove
N-1641365				7/2/2024 11:17:00 AM	CANCELLED	DECEASED	Process Remove



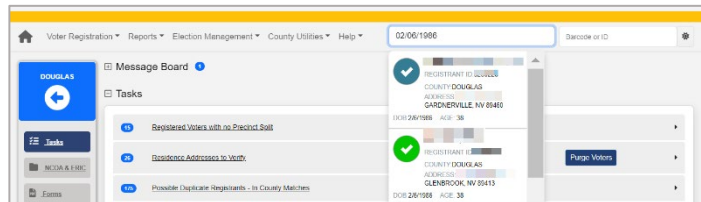
## Processing Opt Out Requests

Requests to Opt Out of mailed ballots are received in either paper form or via the state's monthly report. In both cases, the voter profile is updated to Opt Out status. When the Opt Out request is received in paper form, the request document is scanned to the voter profile Attachments.

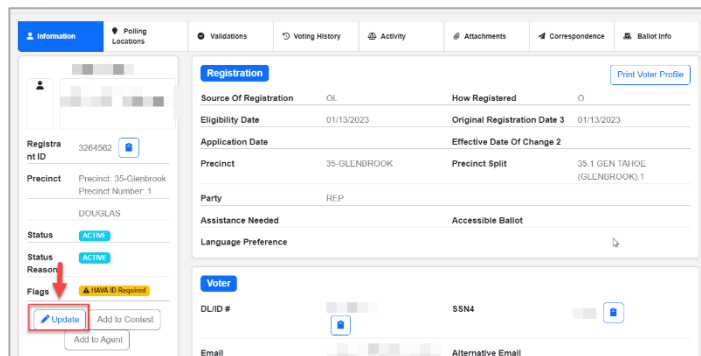
This document describes how to process voter requests to opt out of mail ballots.

### Updating Voter Profiles

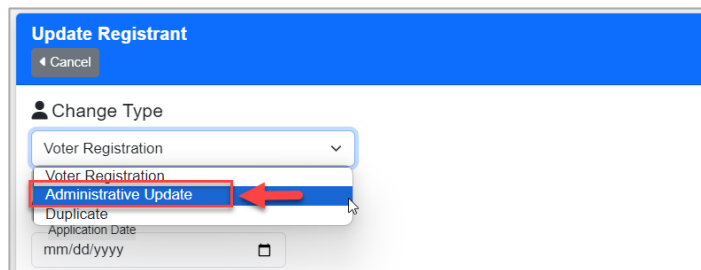
Using the State's Opt Out report, enter the voter's **date of birth** in the Quick Search **Last Name** field in MM/DD/YYYY format.



Select the voter profile and click **[Update]**.



Set the **Change Type** to **Administrative Update**.



Toggle **Opt Out of VBM** to  **On** and select one or more of the Opt Out election categories:

- All Future Primary Elections
- All Future General Elections
- All Future Special Elections

Set the **Effective Date of Change to Request Date** on the State report or the signature date on a paper form. Select Language Preference and ensure Date of Registration is not blank.

The screenshot shows the voter registration form with several fields highlighted in red boxes and arrows. At the top, the 'Opt out of VBM' toggle is set to 'On'. Below it, three checkboxes are selected: 'All Future Primary Elections', 'All Future General Elections', and 'All Future Special Elections'. In the 'Office Use Only' section, the 'Effective Date of Change 2' is set to 09/02/2024, and the 'Language Preference' is set to English. The 'Date of Registration' field is also highlighted.

Scroll down and click **[Update Registrant]**.

The screenshot shows the 'Verification Checks' section of the voter registration interface. It contains several buttons for running specific checks: 'Duplicate Check', 'Deceased Check', 'Incarcerated Check', and 'Business Rules Check'. At the bottom right, the 'Update Registrant' button is highlighted with a red box and an arrow.

Note that the voter profile now includes relevant Opt Out flags.

The screenshot shows the voter profile page with various tabs like 'Information', 'Polling Locations', 'Validations', etc. The 'Registration' tab is active, showing details such as 'Source Of Registration: WALK-IN', 'Eligibility Date: 01/03/2022', and 'Effective Date Of Change 2: 08/28/2024'. Under the 'Flags' section, the 'Opt Out Future Primary' flag is highlighted in red.

## Scanning Paper Requests

Locate the voter profile and select **[Update]**.

**Tip:** Enter the registrant's date of birth in the Quick Search **Last Name** field to easily locate the voter.

The screenshot shows the voter profile page with the 'Update' button highlighted in red. The 'Registration' tab is active, showing details such as 'Source Of Registration: WALK-IN', 'Eligibility Date: 01/03/2022', and 'Effective Date Of Change 2: 08/30/2024'. The 'Update' button is located at the bottom left of the profile information section.

Click into the **Change Type** field and select **Administrative Update**.

The screenshot shows the 'Update Registrant' form. At the top, there is a 'Change Type' dropdown menu. The current selection is 'Voter Registration'. A red box highlights the dropdown, and a red arrow points to the 'Administrative Update' option, which is highlighted in blue. Below the dropdown, there are options for 'Duplicate' and 'Application Date' (08/28/2024).

Select **Attachments**.

The screenshot shows the voter profile page for 'EMBLEY, PAMELA LOUISE'. The 'Attachments' tab is selected and highlighted with a red box. The page displays registration details such as 'Source Of Registration' (WALK-IN), 'Eligibility Date' (01/03/2022), and 'Application Date' (08/28/2024).

Select **[ Scan ]**.

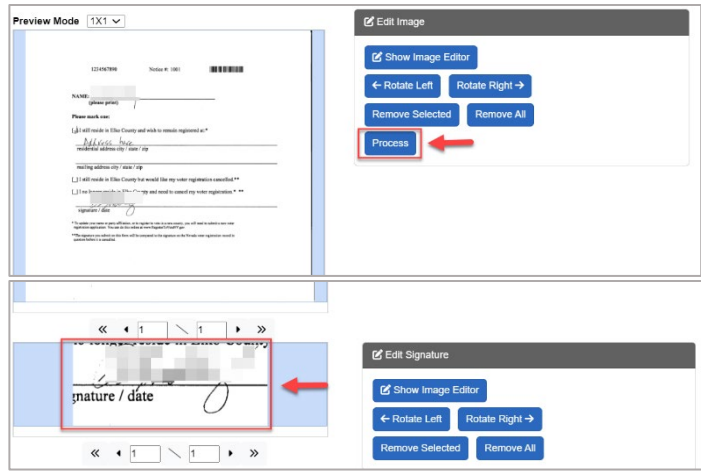
The screenshot shows the 'Attachments' section of the voter profile page. The 'Scan' button is highlighted with a red box. Below it, there is a table of attachments with columns for 'Attachment Type', 'Attachment Notes', 'Date Created', 'Added By', 'County', and 'Batch Number'. Two attachments are listed: 'Notice Response' and 'ADDRESS CONFIRMATION'.

Select **OPT Out Mail Ballot** from the **Form Type** dropdown list and **[Scan Image]**.

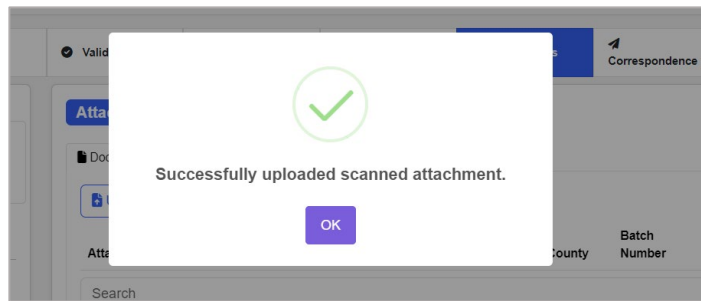
**Note:** If no **Form Type** is selected, Scanner settings will be blank and cannot be selected.

The screenshot shows the 'Scan Form' page. The 'Form Type' dropdown menu is open, and 'OPT Out Mail Ballot' is selected, highlighted with a red box and a red arrow. Below the dropdown, there are radio buttons for 'B&W', 'Gray', and 'Color'. The 'Pages Per Image' is set to 1. At the bottom, the 'Scan Image' button is highlighted with a red box and a red arrow, along with a 'Load Images' button.

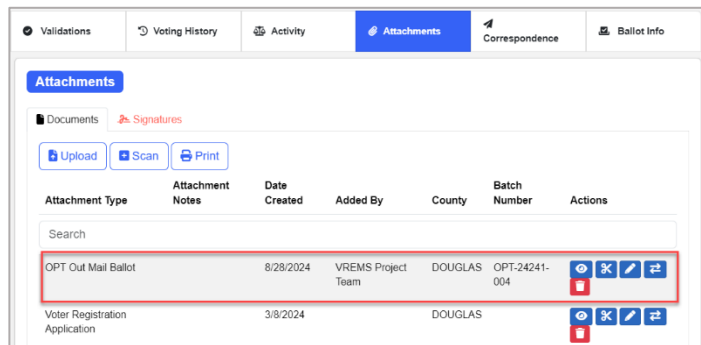
Scroll down and note that the signature is displayed in a separate image editor box. Confirm the signature is displayed correctly and scroll back up to select **[Process]**.



TotalVote displays Successfully uploaded scanned attachment. Click **[OK]**.



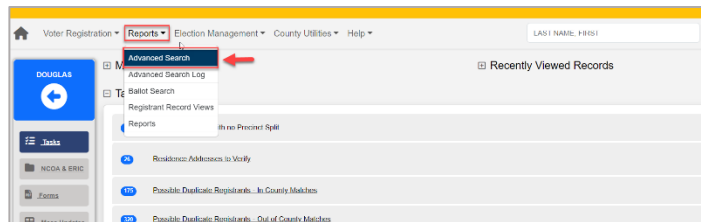
Confirm the scanned notice is now an Attachment in the voter profile.



## Creating a List of Opt Out Voters

Use Advanced Search to create a report of Opt Out registrants.

From the Navigation Bar, select **Reports > Advanced Search**.



Search defaults to Active and Inactive status registrants. To see all Opt Out registrants, delete the **Status** criteria by clicking the x next to each selected criteria. Under **Other Options**, select **Opt Out of VBM** and any of the specific flags:

- All Future Primary Elections
- All Future General Elections
- All Future Special Elections

Scroll down and click **[Search]**.

**Create Notices or Export** as needed.

Id	First Name	Last Name	Middle Name	Status	Status Reason	County	Residential Address	Residential City	Residential Zip
				ACTIVE	ACTIVE	DOUGLAS		GAVERNSVILLE	65450
				ACTIVE	ACTIVE	DOUGLAS		GAVERNSVILLE	65410
				ACTIVE	ACTIVE	DOUGLAS		GAVERNSVILLE	65410
				ACTIVE	ACTIVE	DOUGLAS		GAVERNSVILLE	65410

## Running Opt Out Reports

TotalVote offers two reports for quantifying the number of Opt Out voters:

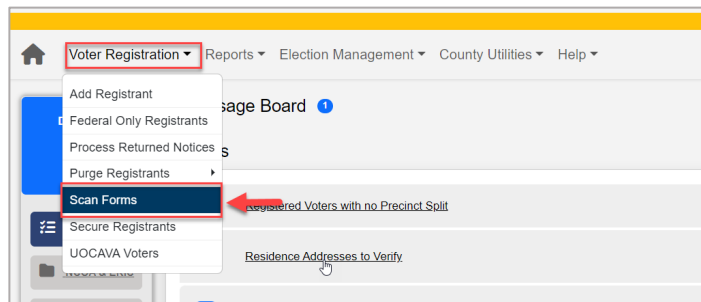
- Opt Out Report
- Opt Out Report with voter data

To run a report of Opt Out voters by election, party, or status, go to **Reports > Reports** and select the report.

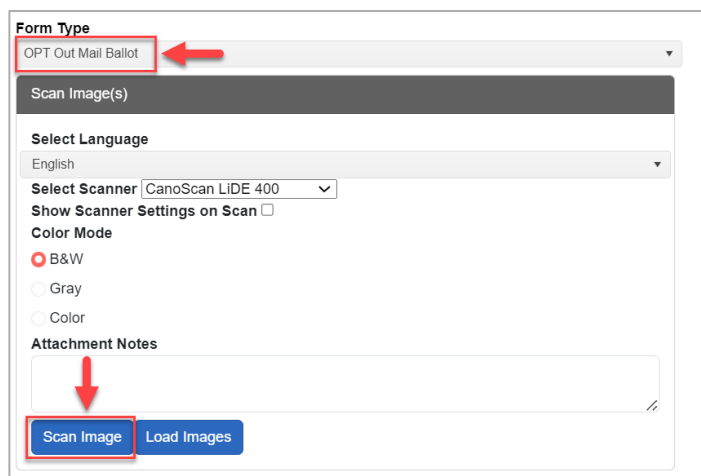
## Defined Signature Area in Forms/Returned Notices

The first time a form or returned notice is scanned, the signature area must be defined. This document covers processes required to identify the signature area of a form or notice.

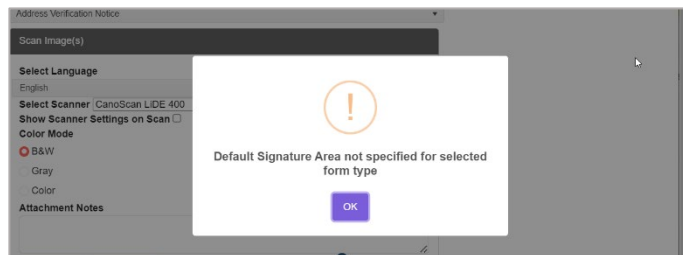
Select Voter Registration > Scan Forms.



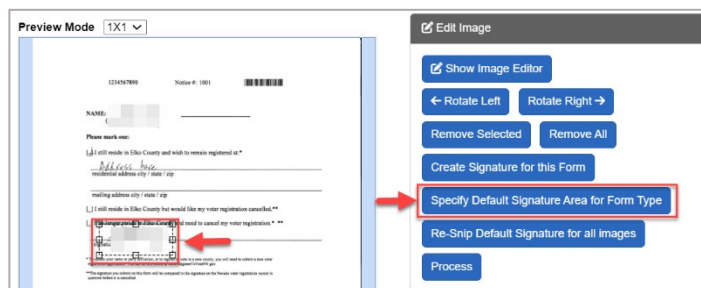
Select Form Type and [Scan Image].  
**Note:** If no **Form Type** is select, Scanner settings will be blank and cannot be selected.



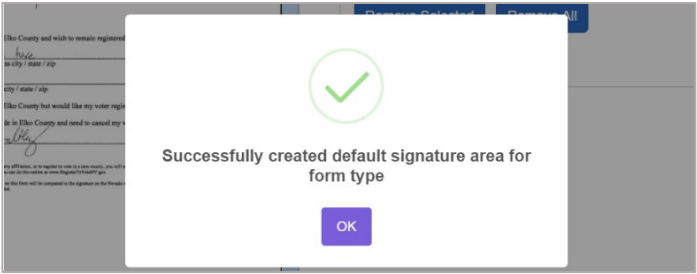
The first time a form type is processed, TotalVote prompts **Default Signature Area not specified**. Click [OK] and scroll down to view the full form.



Use the cursor to frame the signature. New options are displayed in the **Edit Image** box. Click [Specify Default Signature Area for Form Type].



TotalVote displays Successfully created default signature area for form type.  
Click **[OK]**.



## Processing and Sending Unsent Notices

When a voter registers to vote or their information changes in TotalVote, depending on the type of update TotalVote automatically creates a notice to be sent to the voter and stores it within the **Voter Profile** on the [X **Correspondence**] tab. Counties must process notices within the mailing deadlines set forth by State and County regulations. This document provides guidance for processing unsent notices in TotalVote including printing, marking notices as sent, and running sent notices reports.

**IMPORTANT:** Each County manages its own **Notice Templates** in TotalVote. Counties must ensure notice templates are set up correctly and contain the mandatory verbiage for each type of notice, layouts comply with their pre-printed stock and are updated with any legislative or mandated verbiage changes.

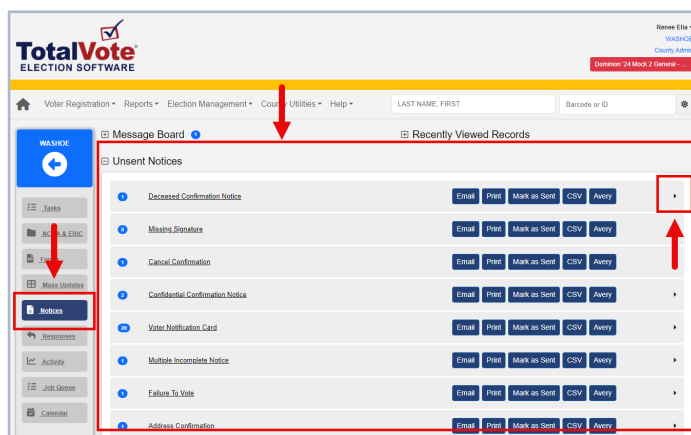
### Managing Notices & Correspondence from the Dashboard

**IMPORTANT:** All dashboard screenshots display an [Email] button that is inactive and will be hidden in a future phase. Do not click the [Email] button.

A list of all unsent notices is displayed in the **Unsent Notices** queue on the **Dashboard** > [X **Notices**].

From the **Unsent Notices** queue, you can export, print, and download unsent notices and address labels, and mark notices as sent.

Unsent notices are grouped by type. Click the **arrow** ► on a grouping to expand and view the list of unsent notices for the notice type.





## In the Voter Profile

A list of notices and other correspondence is displayed in the **[X Correspondence]** tab of the voter's profile.

From the **[X Correspondence]** tab, you can view, create, edit, delete, and mark notices as sent.

The screenshot shows the 'Correspondence' tab in a voter profile interface. A red box highlights the 'Correspondence' tab in the top navigation bar and the main content area. A red arrow points to the 'Correspondence' tab. Below the navigation bar, there are four sub-tabs: 'Create Mail Correspondence', 'Create Email Correspondence', 'Create Phone Correspondence', and 'Create In Person Correspondence'. The main content area displays a table of correspondence items with columns for Type, View Document, Notice Name, Notice ID, Notice Notes, Date Created, Date Sent, Sent By, Status, Date Received, Received By, Return Type, Forwarding Address, Forwarding City, Forwarding State, Forwarding Zip, and a Delete column. The table contains several rows of data, including 'IN PERSON CORRESPONDENCE', 'PHONE CORRESPONDENCE', 'EMAIL CORRESPONDENCE', and 'ADDRESS CHANGE'. Each row has a 'Delete' button and an 'Edit' button. At the bottom right, there is a pagination indicator '1 to 8 of 8 shown' and a page number '10'.

Type	View Document	Notice Name	Notice ID	Notice Notes	Date Created	Date Sent	Sent By	Status	Date Received	Received By	Return Type	Forwarding Address	Forwarding City	Forwarding State	Forwarding Zip	Delete
IN PERSON CORRESPONDENCE		In person correspondence demo	148871		6/18/2024 4:10 PM											Delete Edit
PHONE CORRESPONDENCE		Phone correspondence demo	148872		6/18/2024 6:38 PM											Delete Edit
EMAIL CORRESPONDENCE		Email Correspondence training demo	148873		6/18/2024 2:28 PM	6/18/2024 6:27 PM	RENCE ELA	0								Delete Edit
ADDRESS CHANGE	<a href="#">View Notice</a> 10.3m <a href="#">Sent</a>	Mail Correspondence training demo	148874		6/18/2024 2:28 PM											Delete Edit
TV/TTY			148883		3/8/2023 10:21 AM	3/8/2023 12:00 AM		446								Delete Edit
VRC-WV			138963		3/14/2023 8:11 AM	3/15/2023 12:00 AM		851								Delete Edit
VRC-WV			112022		1/12/2022 7:18 AM	1/12/2022 12:00 AM		888								Delete Edit
REG-INCL			127643		1/12/2022 3:51 AM	1/12/2022 12:00 AM		884								Delete Edit

## Exporting Notices for Mail Vendors

Large counties may use a print vendor and/or mail house to print and send large quantities of notices. In this case, you can export **unsent notices (CSV and PDF)** and **address labels (Avery)** from TotalVote and send the files to the vendor for printing and mailing.

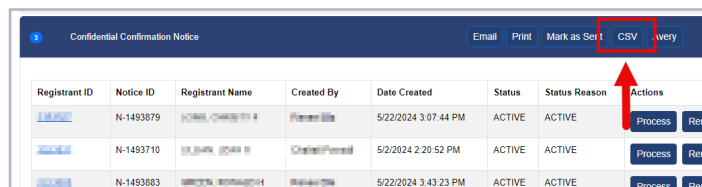
**TIP: [Mark as Sent]** may be used to process large batches of notices to send to a vendor for printing and is performed in lieu of steps and below. See [Marking a Batch of Notices as Sent](#) to see how the CSV and PDF files get exported automatically when clicking [Mark as Sent].

**Example:** Confidential Confirmation Notice

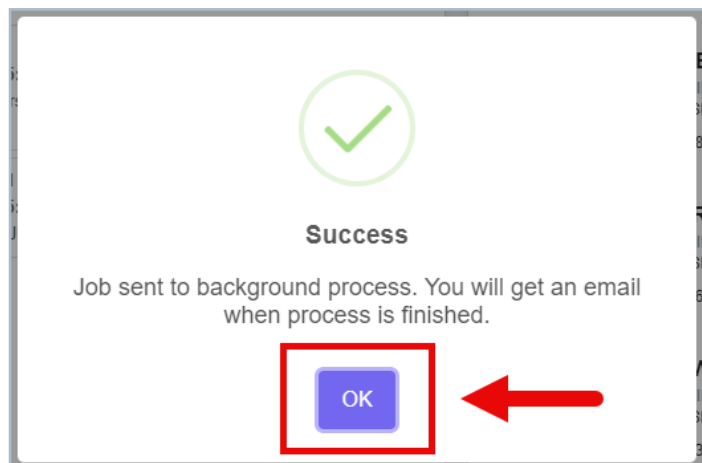
### Exporting Notices (CSV)

With a notice group expanded on the Dashboard, review the list of unsent notices.

To export all notices under the grouping into CSV format, click **[CSV]** on group's menu options.

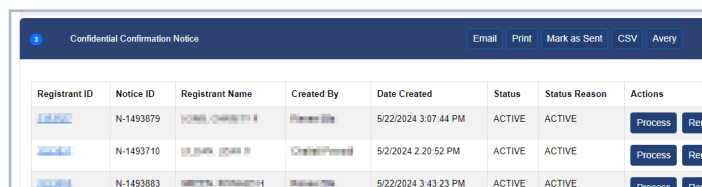


A confirmation message is displayed, and the system starts generating a CSV file in a background process. Click **[OK]**.



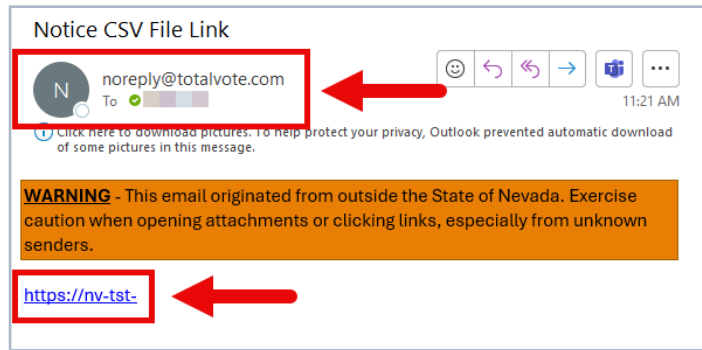
The notification closes, and you are returned to the Unsent Notices queue.

When the process is finished, you will receive an **email notification**, and the export will be available in the **Notice CSV Export** queue on the **Dashboard** (next steps).

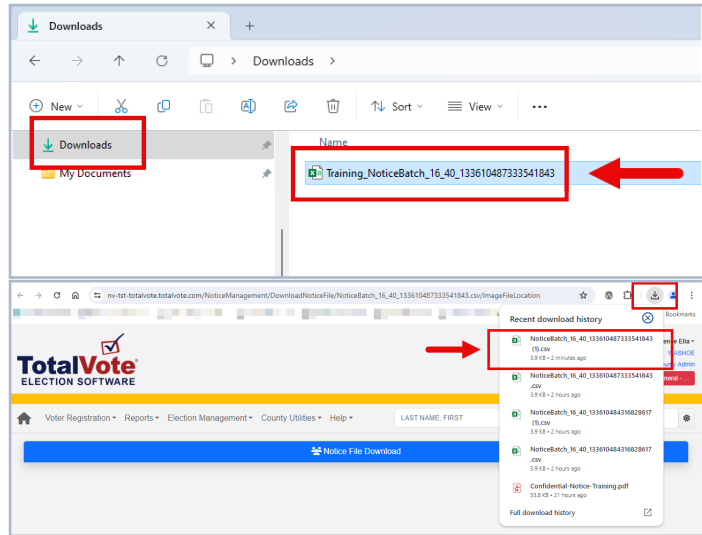



### Email Notification

When the export process is finished, you will receive an email notification from **noreply@totalvote.com** to the email address associated to your TotalVote user account. The email subject line is **Notice CSV File Link**. Open the **email**, then click the **link** in the email.

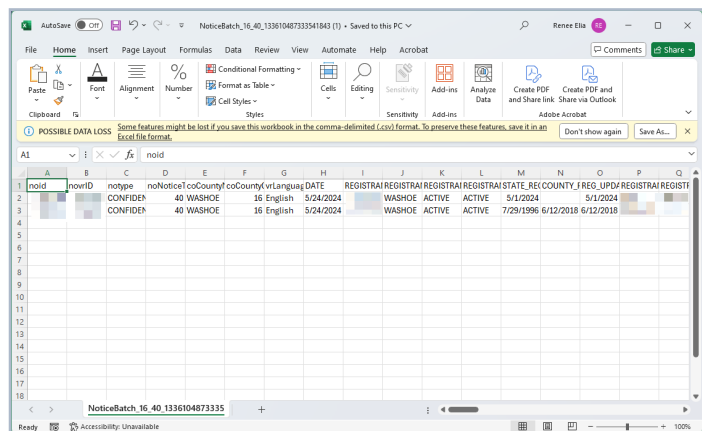


Your web browser opens, and the CSV file is downloaded in a background process to the **Downloads** folder on your computer. Double-click on the file to open it.



**TIP:** Click the Download icon  in the browser to open your **Recent Download History**. Click on the file to open it.

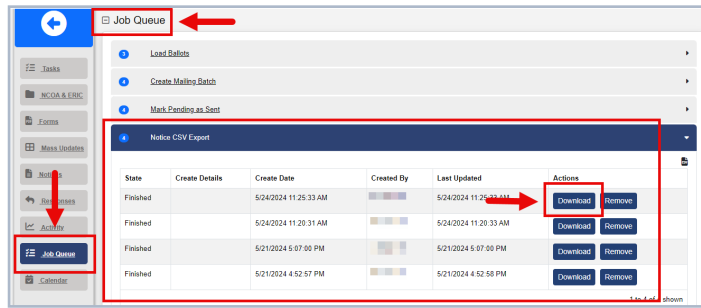
The file opens in the default **spreadsheet program** on your computer, such as Microsoft Excel. Continue processing the file according to your county process.



## Notice CSV Export queue

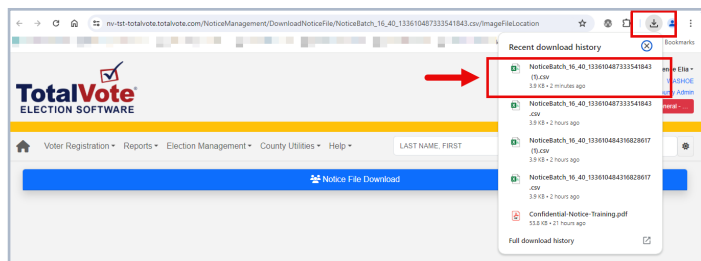
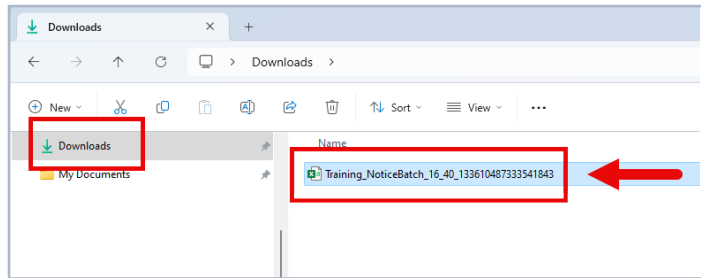
In addition to receiving an email notification after the export process is finished, the CSV file is available to download from the **Dashboard** under **Job Queue > Notice CSV Export** queue.

To download the file, under **Actions**, click **[Download]**.

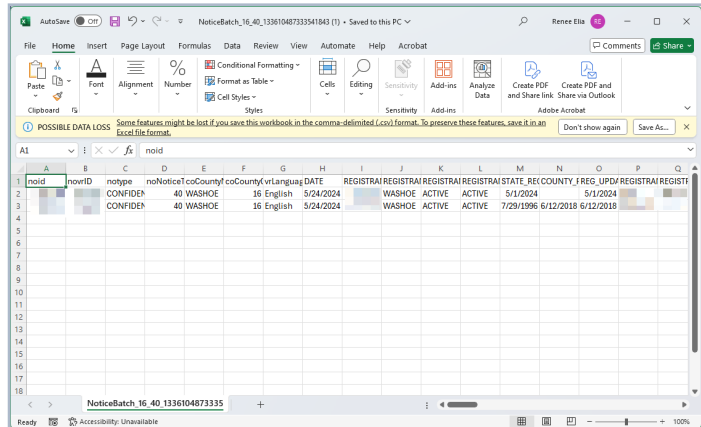


The CSV file is downloaded in a background process to the **Downloads** folder on your computer. Double-click on the file to open it.

**TIP:** Click the Download icon [📄] in the browser to open your **Recent Download History**. Click on the file to open it.

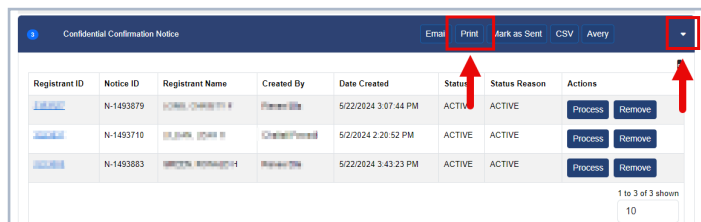


The file opens in the default **spreadsheet program** on your computer, such as Microsoft Excel. Continue processing the file according to your county process.

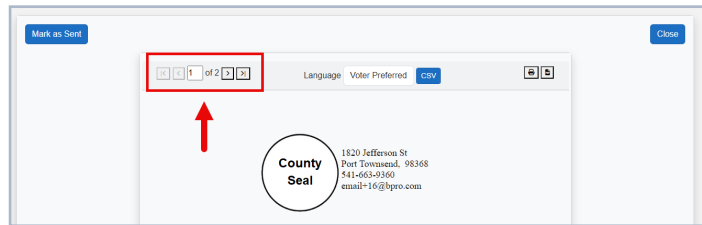


## Exporting Notices (PDF)

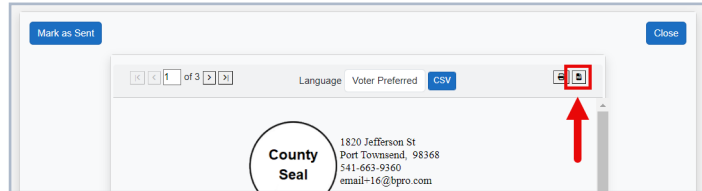
With a notice group expanded on the Dashboard, click **[Print]** on the group's menu options.



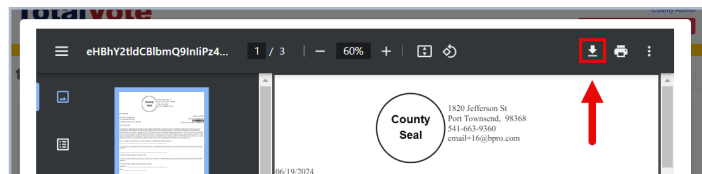
A notice preview screen opens, and all unsent notices in the selected notice type are displayed. Validate the information on the notices. Click the right [➤] and left [⏪] arrows to view the next and previous page of notices in the batch.



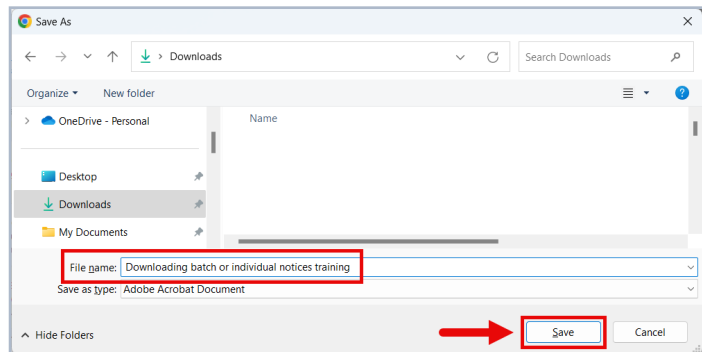
Click the PDF icon [📄] on the notice preview screen of an **individual** notice or **batch** of notices.



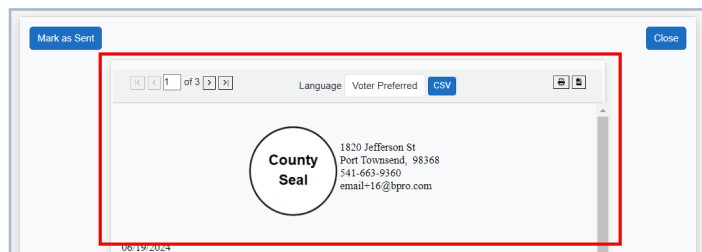
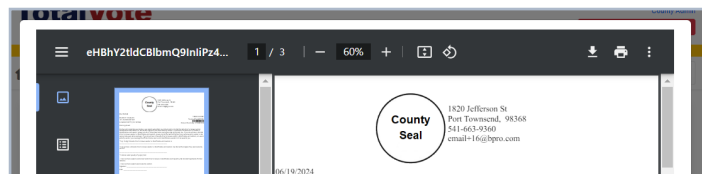
A PDF preview window opens, and the notice is displayed. Click the Download icon [⏴].



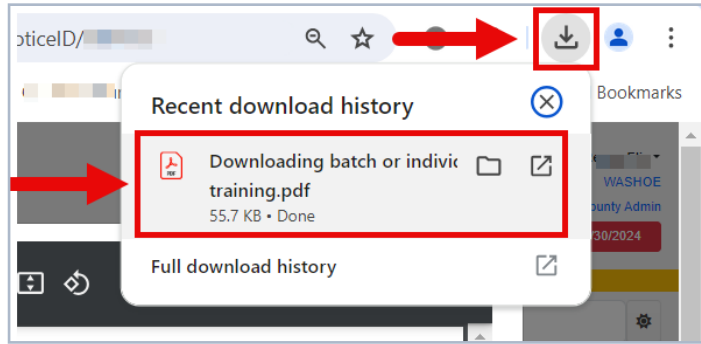
A **Save As** dialog box opens. Select the desired **destination folder** on your computer or network drive to save the file in. Update the **File name** if required. Click [**Save**].



The **Save As** dialog box closes, the PDF file is saved to the selected destination folder on your computer, and you are returned to the **PDF preview window**. Click outside the PDF preview window to close it and return to the **notice preview screen**.

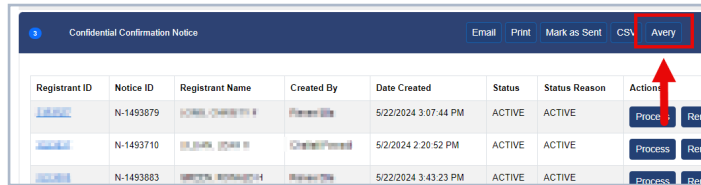


**TIP:** Click the Download icon [📄] in the browser to open your **Recent Download History**. Click on the file to open it.



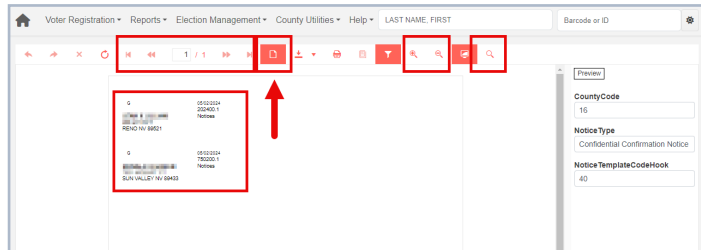
## Exporting Address Labels (CSV)

With a notice group expanded on the Dashboard, click **[Avery]** on group's menu options.

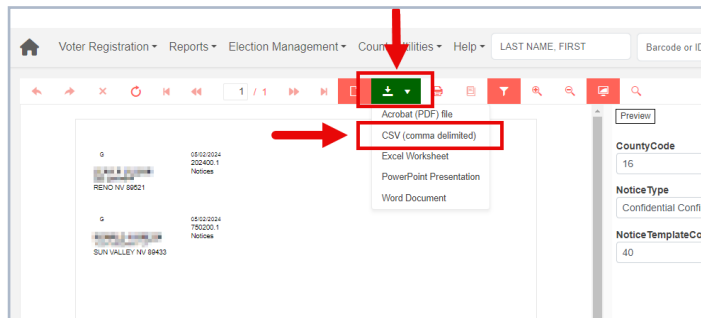


A **labels preview screen** is displayed and the Print Preview icon [🖨️] is toggled on (solid orange).

Validate the information on the labels. Use the menu options to **navigate**, **search**, and **zoom** in and out of the pages of labels in the batch.

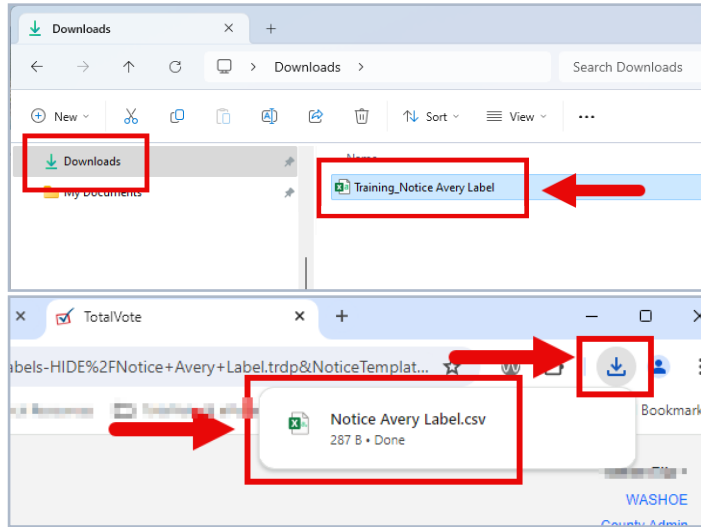


In the labels preview menu, click the Download icon [📄]. Select **CSV (comma delimited)** or the file format of your choice.

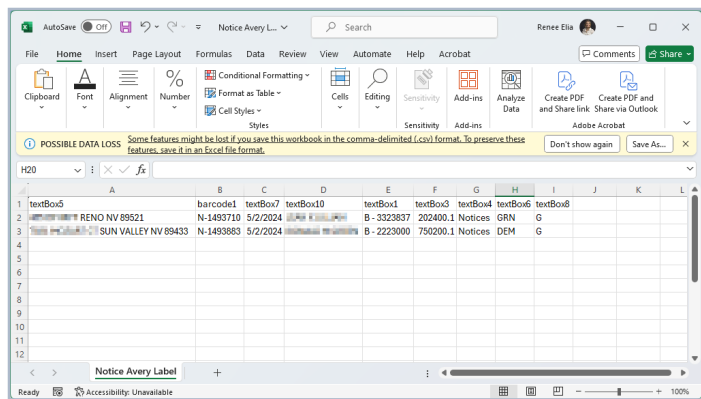


A CSV file is downloaded in a background process to the **Downloads** folder on your computer.  
Double-click on the file to open it.

**TIP:** Click the Download icon [📄] in the browser to open your **Recent Download History**. Click on the file to open it.



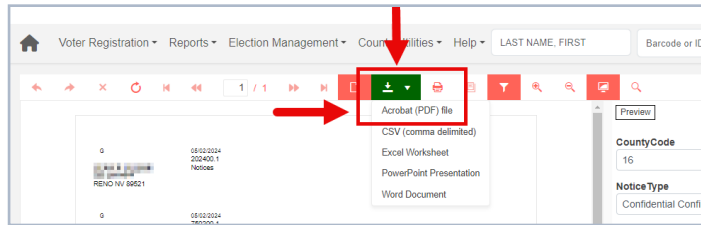
The file opens in the default **spreadsheet program** (such as Microsoft Excel) on your computer.  
Continue processing the file according to your county process.  
**TIP:** The CSV contains many field values so you can use it for a mail merge and create notices as desired.



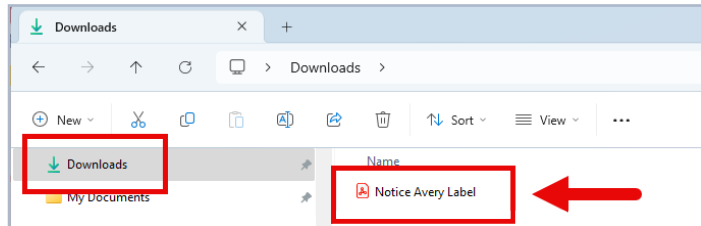
## Exporting Address Labels (PDF)

Return to the **labels preview screen**.

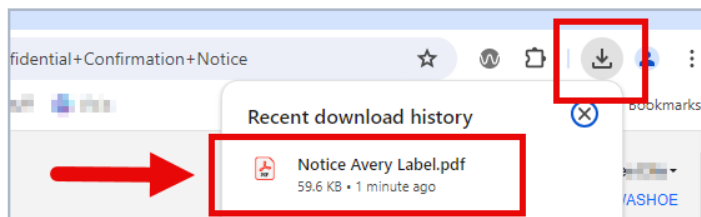
To download address labels to PDF format, click the Download icon [📄], then select **Acrobat (PDF) file**.



A PDF file is exported to the **Downloads** folder on your computer.



**TIP:** Click the Download icon [📄] in the browser to open your **Recent Download History**. Click on the file to open it.





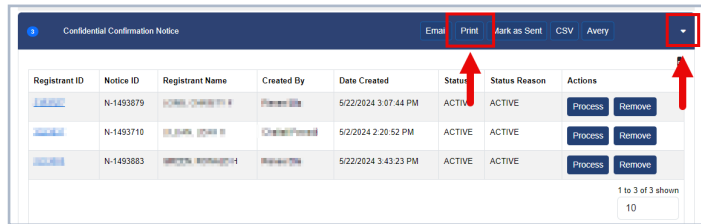
## Printing Notices for In-House Mailings

Notices and address labels can be printed in-house in batches or individually for regular or one-off mailings.

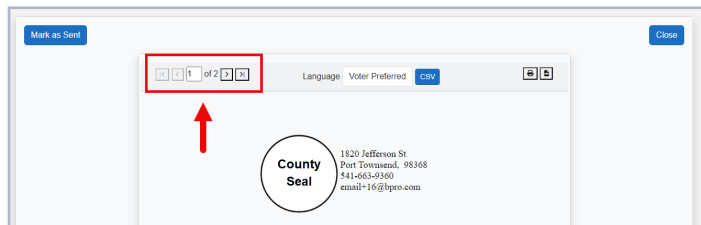
### Printing a Batch of Unsent Notices

With a notice group expanded on the Dashboard, review the list of unsent notices.

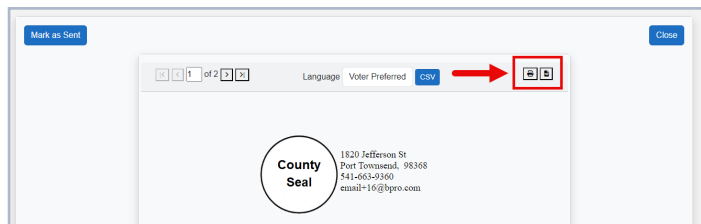
To print all notices under the grouping, click **[Print]** on the group's menu options.



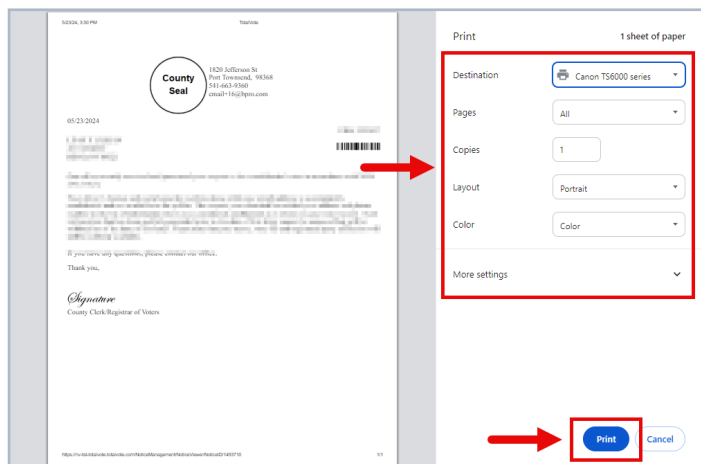
A notice preview screen opens, and all unsent notices in the selected notice type are displayed. Validate the information on the notices. Click the right **[>]** and left **[<]** arrows to view the next and previous page of notices in the batch.



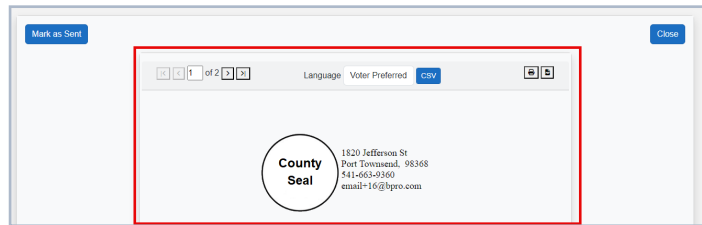
Ensure the correct paper or card stock is properly loaded in the printer tray and Print **[🖨]**.



A **Print** dialog box opens. Select the **Destination** printer, update any other print settings and **[Print]**.

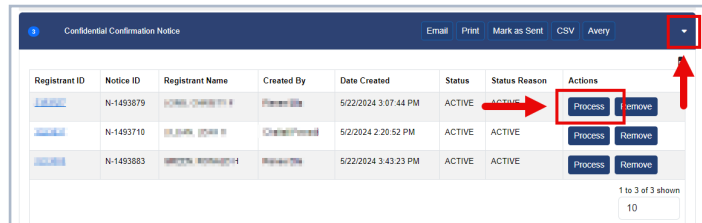


The notice is sent to the Destination printer.  
The notice preview screen is displayed.

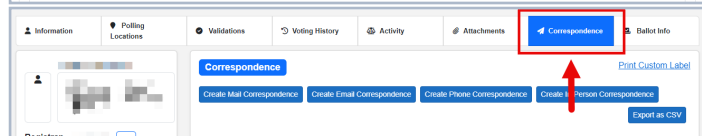


## Printing Individual Unsent Notices

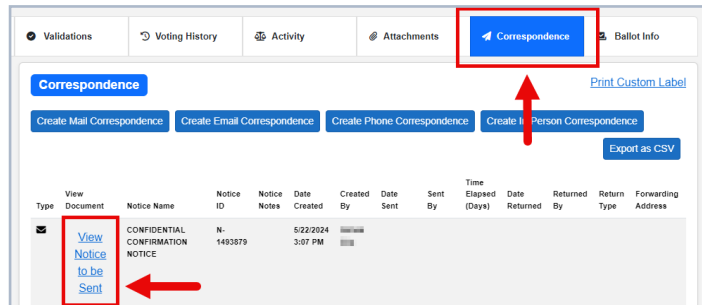
With the notice group expanded on the **Dashboard**, click **[Process]** for the desired record.



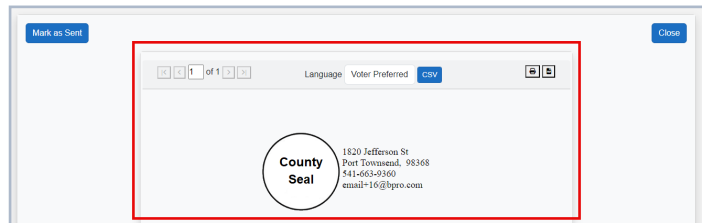
Or search for a voter, open their profile and navigate to the **[Correspondence]** tab.



A list of sent and unsent notices is displayed.  
Click **View Notice to be Sent** on the unsent notice you want to print.

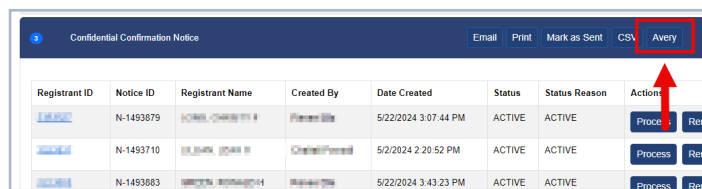


A notice preview screen is displayed.  
Review the information on the notice and Print **[Print]**.



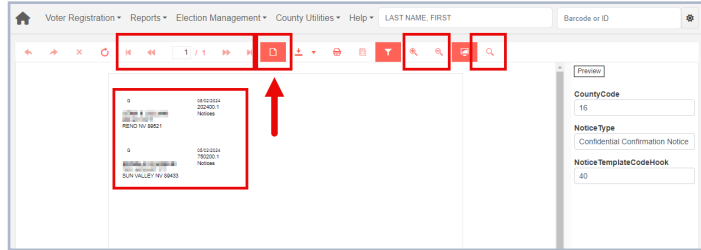
## Printing Address Labels (Avery)

With the notice group expanded on the **Dashboard**, review the list of unsent notices.  
To print mailing labels for all notices under the grouping, click **[Avery]** on group's menu options.

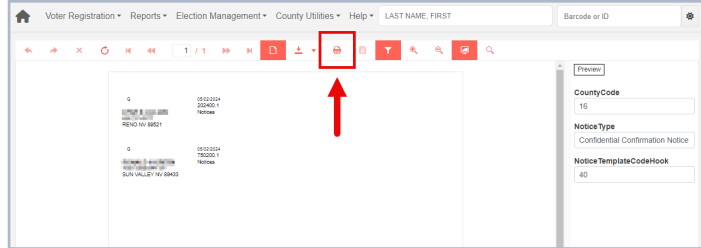


A **labels preview screen** is displayed and the Print Preview icon [🖨️] is toggled on (solid orange).

Review label information using the menu option to navigate, search, and zoom in and out of the pages of labels in the batch.



Ensure the label sheet(s) is properly loaded in the printer tray and **Print** [🖨️].



## Marking Notices as Sent

Once notices have been printed and sent to voters, you must mark the notices as sent in TotalVote. You can mark notices as sent in **batches** or **individually**.

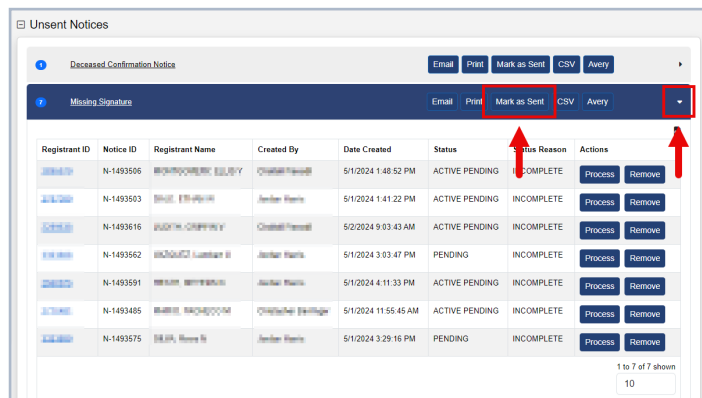
Using **Mark as Sent** starts a **background process** to mark the notices as sent for each voter in the list (updating the notice status in the voter's profile on the Correspondence tab), removes the notice(s) from the Unsent Notices queue on the Dashboard, starts any applicable 33-day or 15-day processes, generates a CSV file of the batch of notices, and creates a PDF for each notice.

**Example:** Missing Signature Notice

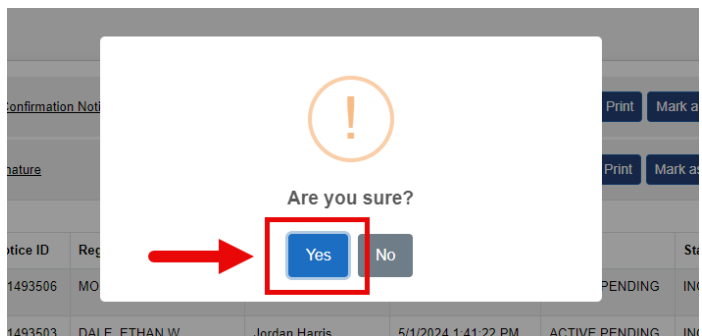
### Marking a Batch of Notices as Sent

With the notice group expanded on the Dashboard, review the list of unsent notices.

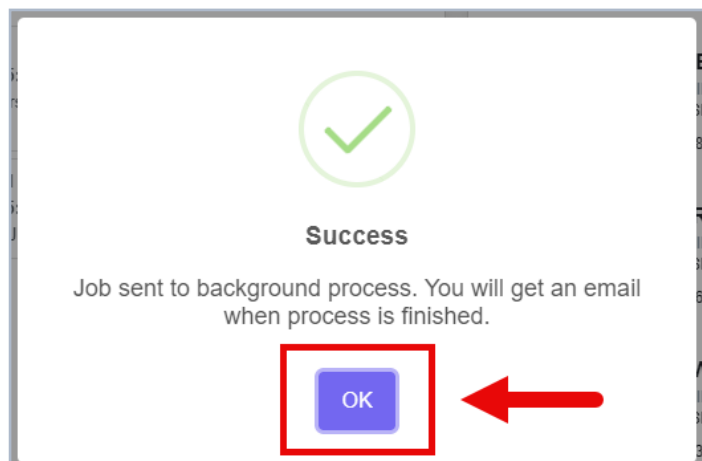
After all notices in the list are sent per your county process, click **[Mark as Sent]** on the group's menu options.



A notification screen is displayed. To continue marking all notices in the queue type as sent, click **[Yes]**.

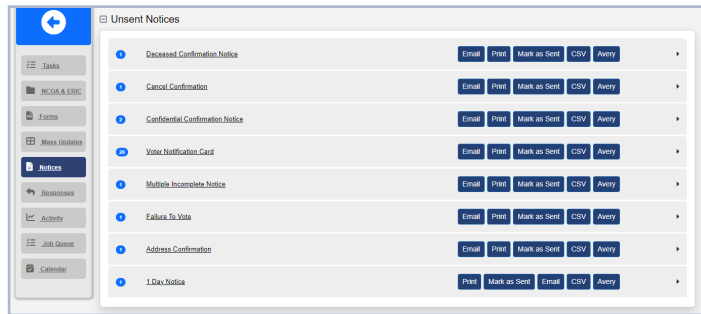


A confirmation message is displayed, and the system starts generating the CSV file in a background process. Click **[OK]**.



The notification closes and you are returned to the Unsent Notices queue.

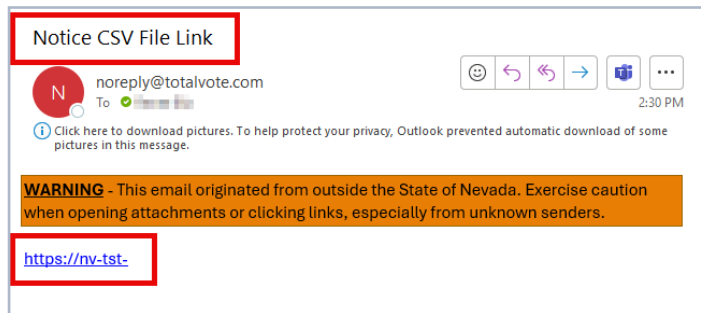
The sent notices are removed from the Unsent Notices queue on the Dashboard.



## Email Notifications

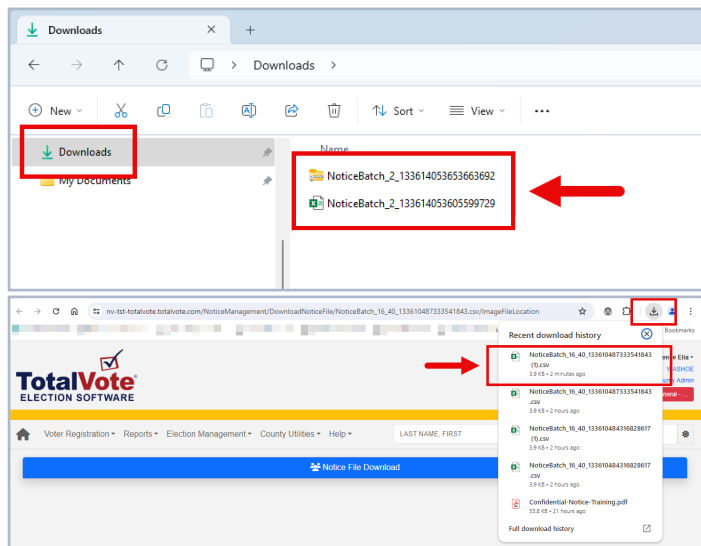
When the background process is finished, TotalVote sends **two emails** from **noreply@totalvote.com** to the email address associated to your TotalVote user account. The first email contains a link to the **batch CSV file** (the file can also be found in the job queue in Mark Notice Batch as Sent). The second email contains a link to the **batch PDFs**.

The first email's subject line reads **Notice CSV File Link**. The email contains a link to a **CSV** file containing information on all voters that were sent a notice for the selected notice group type. Open the **email**. Click the **link** in the email.

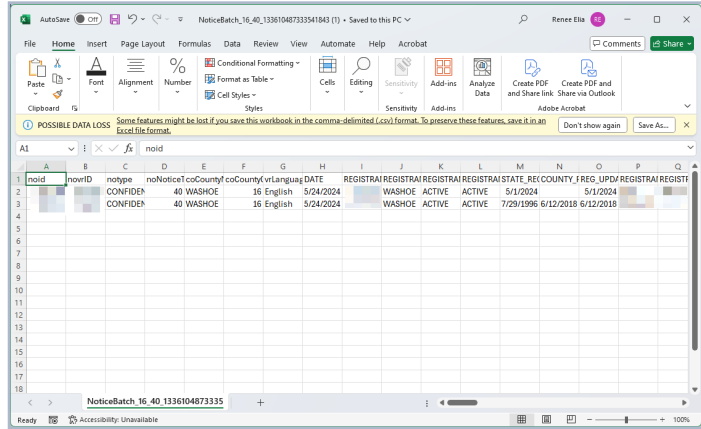


Your web browser opens. The **CSV** and **.zip** files are downloaded in a background process to the **Downloads** folder on your computer. Double-click on the files to open them.

**TIP:** Click the [Download icon] in the browser to open your **Recent Download History**. Click on the file to open it.



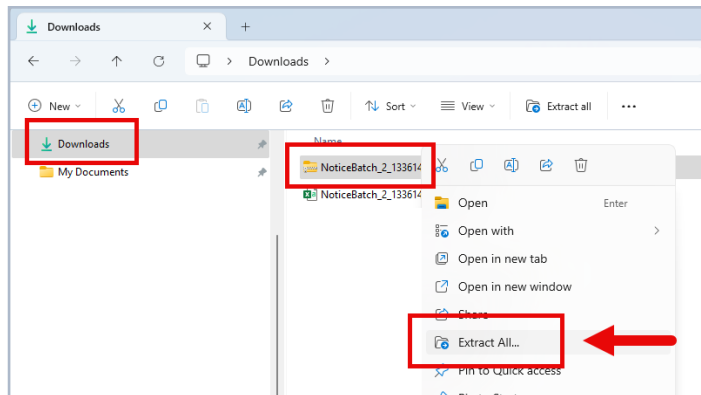
The CSV file opens in the default **spreadsheet program** (such as Microsoft Excel) on your computer.  
Continue processing the file according to your county process.



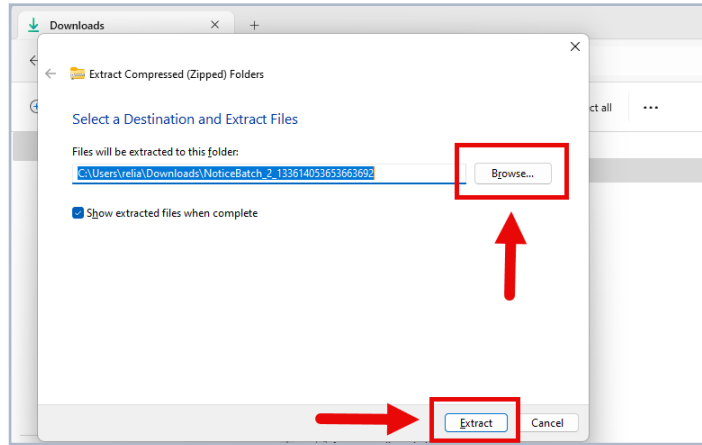
The **second email's** subject line reads **Notice File Link**. The email contains a link to a **.zip file** of a **PDF file** containing all correspondence that was sent to the voters in the selected notice group type.  
Open the **email**.  
Click the **link** in the email.  
**TIP:** The PDF can be used for an audit of what was marked sent and as a tool to print the notices.



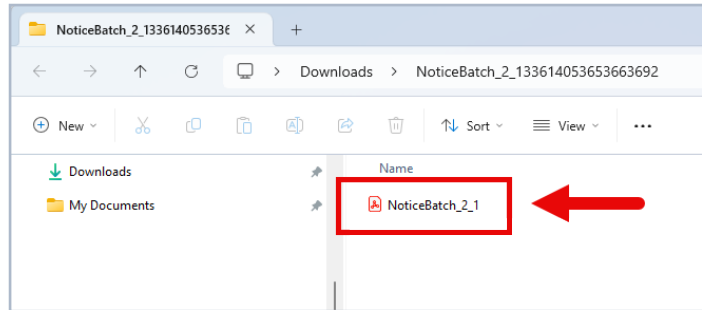
The **.zip file** is downloaded to the **Downloads** folder on your computer.  
Right-click on the **.zip folder** and select **Extract All...** in the menu.



An **Extract Compressed (Zipped) Folders** dialog box opens. Click **[Browse...]** and select the desired destination folder on your computer or network drive to save the extracted file in. Update the **File name** if required. Click **[Extract]**.

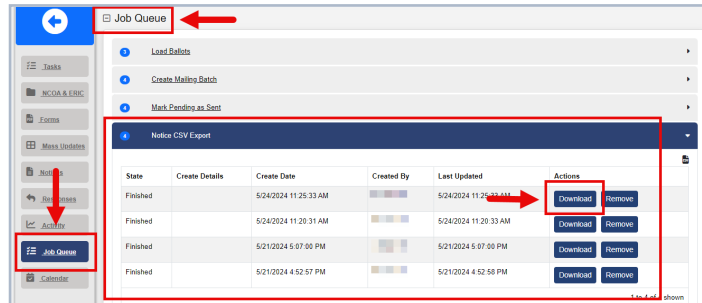


The destination folder opens, and the **extracted PDF** is displayed. Continue processing the file according to your county process.

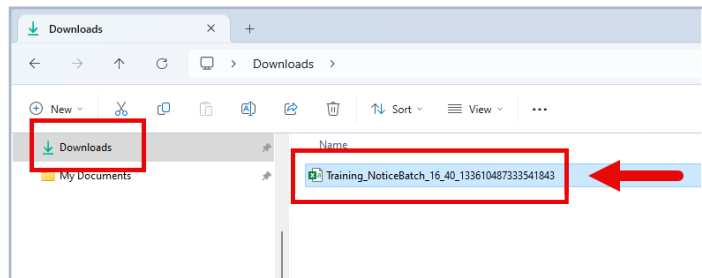


### Notice CSV Export Queue

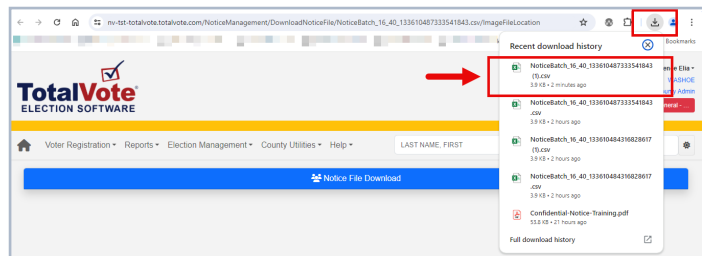
In addition to receiving the **Notice CSV File Link** email notification, the CSV file is available to download from the **Dashboard** under **Job Queue > Notice CSV Export** queue. To download the file, under **Actions**, click **[Download]**.



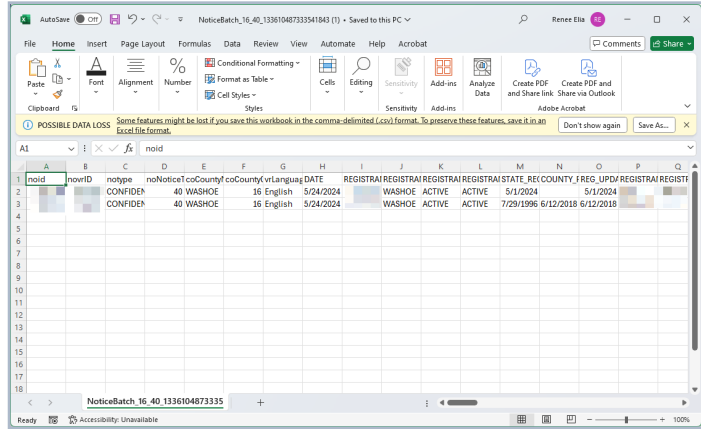
The CSV file is downloaded in a background process to the **Downloads** folder on your computer. Double-click on the file to open it.



**TIP:** Click the Download icon [📄] in the browser to open your **Recent Download History**. Click on the file to open it.

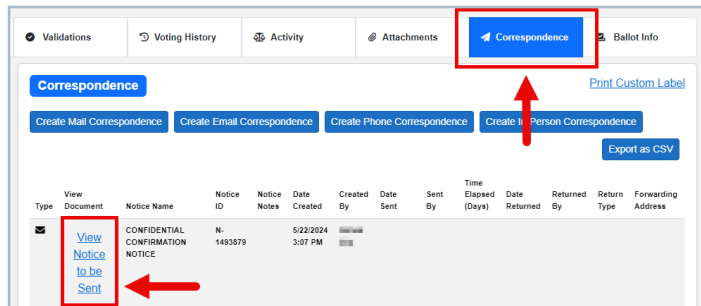


The file opens in the default **spreadsheet program** (such as Microsoft Excel) on your computer.  
Continue processing the file according to your county process.

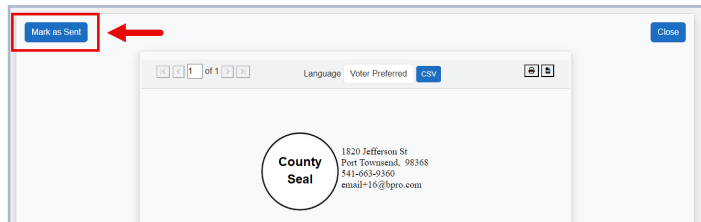


## Marking an Individual Notice as Sent

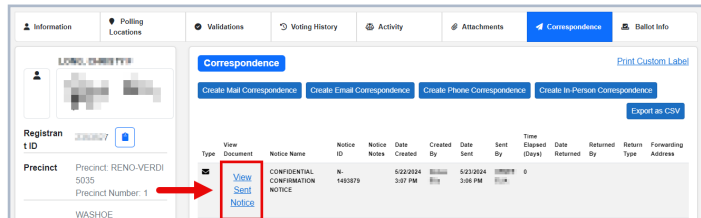
Open a Voter Profile and navigate to the **Correspondence** tab.  
A list of sent and unsent notices is displayed.  
Click **View Notice to be Sent** on the unsent notice you want to print.



A notice preview screen is displayed.  
After the notice is sent to the voter per your county process, click **Mark as Sent**.



The notice closes and you are returned to the **Correspondence** tab in the Voter Profile.  
To view the sent document, click **View Sent Notice**.  
**TIP:** The notice is removed from the Notices queue on the Dashboard and included in the **Sent (Printed) Notices w/ Address** report. See [Running Sent Notices Reports](#) below.

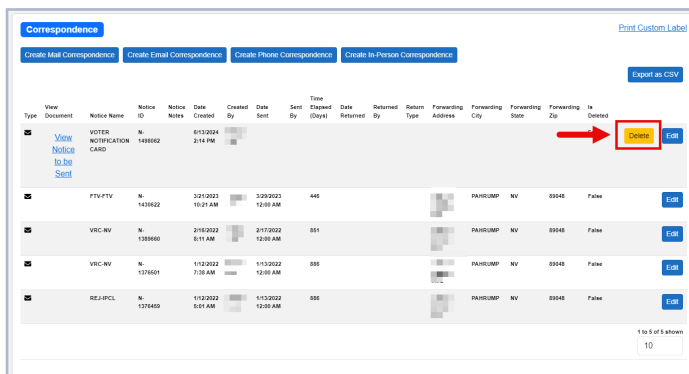




## Deleting Unsent Notices

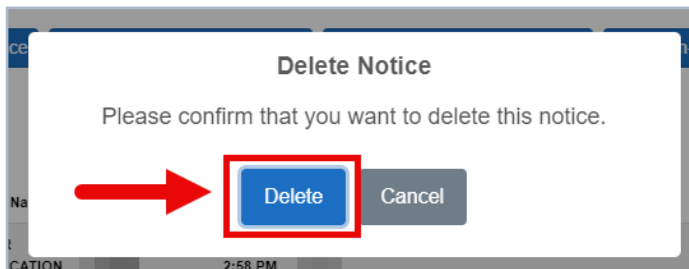
A notice can be deleted before being marked as sent. Sent notices cannot be deleted.

In the Correspondence list, identify the unsent notice to delete. Click **[Delete]**.

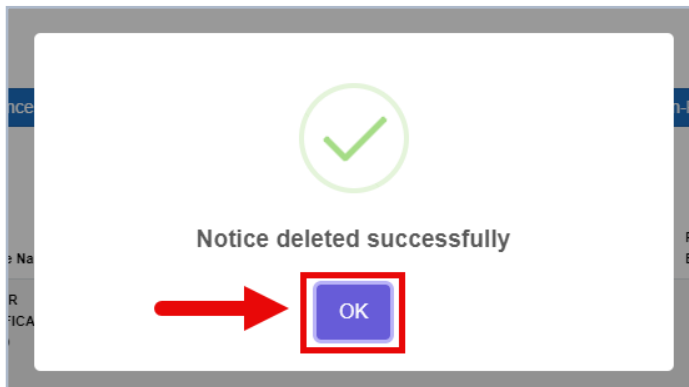


View Document	Notice Name	Notice ID	Notice Date	Created Date	Created By	Date Sent	Time Elapsed (Days)	Date Returned	Returned By	Return Type	Forwarding Address	Forwarding City	Forwarding State	Forwarding Zip	In Deleted
<a href="#">View Notice to be Sent</a>	VOTER NOTIFICATION CARD	N-148892	6/13/2024	6/13/2024	2:14 PM										<b>Delete</b>
<input checked="" type="checkbox"/>	FTV-TV	N-143922	3/21/2023	3/21/2023	10:21 AM	3/29/2023	446	12:00 AM			PARSHUMP	NV	89048	False	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	VRC-NV	N-138960	2/16/2022	2/17/2022	8:11 AM	2/17/2022	551	12:00 AM			PARSHUMP	NV	89048	False	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	VRC-NV	N-137601	1/12/2022	1/12/2022	7:08 AM	1/12/2022	586	12:00 AM			PARSHUMP	NV	89048	False	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	REP-PCCL	N-137649	1/12/2022	1/12/2022	5:51 AM	1/12/2022	586	12:00 AM			PARSHUMP	NV	89048	False	<a href="#">Edit</a>

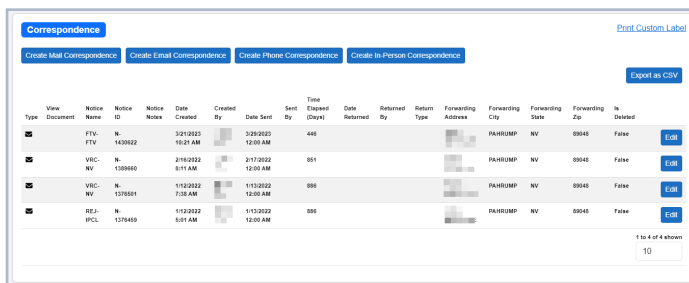
A **Delete Notice** confirmation window is displayed. Click **[Delete]**.



A confirmation that the notice was deleted successfully is displayed. Click **[OK]**.



You are returned to the Correspondence list on the Voter Profile. The notice is removed from the Correspondence list.



View Document	Notice Name	Notice ID	Notice Date	Created Date	Created By	Date Sent	Time Elapsed (Days)	Date Returned	Returned By	Return Type	Forwarding Address	Forwarding City	Forwarding State	Forwarding Zip	In Deleted
<input checked="" type="checkbox"/>	FTV-TV	N-143922	3/21/2023	3/21/2023	10:21 AM	3/29/2023	446	12:00 AM			PARSHUMP	NV	89048	False	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	VRC-NV	N-138960	2/16/2022	2/17/2022	8:11 AM	2/17/2022	551	12:00 AM			PARSHUMP	NV	89048	False	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	VRC-NV	N-137601	1/12/2022	1/12/2022	7:08 AM	1/12/2022	586	12:00 AM			PARSHUMP	NV	89048	False	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	REP-PCCL	N-137649	1/12/2022	1/12/2022	5:51 AM	1/12/2022	586	12:00 AM			PARSHUMP	NV	89048	False	<a href="#">Edit</a>

On the [Activity] tab, under **Registrant Record Activities**, a record of the activity shows the notice was removed.

The screenshot shows a web interface for a registrant record. At the top, there is a yellow header bar with the text "Registrant record: 2200739". Below this is a navigation menu with several tabs: "Validations", "Voting History", "Activity" (highlighted with a red box), "Attachments", "Correspondence", and "Ballot Info". The main content area is titled "Registrant Record Actions" and includes a search bar and an "Export as CSV" button. A table lists the actions performed on the record:

Action	User	Date Changed
Removed Notice (VOTER NOTIFICATION CARD)	WASHOE	6/18/2024 3:06 PM
Uploaded Attachment (2022/02/img_2200739_2357283.jpg)	WASHOE	2/15/2022 8:43 PM
Uploaded Attachment (2022/01/img_2200739_2353667.jpg)	WASHOE	1/11/2022 9:01 PM

At the bottom right of the table, it indicates "1 to 3 of 3 shown" and a page number "10".

## Recording a Correspondence Activity

TotalVote allows you to create a notice or record a **mail, email, telephone** or **in-person** correspondence activity from the voter record under the **[X Correspondence]** tab.

A list of all sent and unsent notices and other correspondence is displayed.

The screenshot displays the 'Correspondence' tab in the TotalVote interface. At the top, there are navigation tabs: 'Validations', 'Voting History', 'Activity', 'Attachments', 'Correspondence' (highlighted with a red box and an arrow), and 'Ballot Info'. Below these are buttons for 'Create Mail Correspondence', 'Create Email Correspondence', 'Create Phone Correspondence', and 'Create In-Person Correspondence'. A 'Print Custom Label' link and an 'Export as CSV' button are also visible.

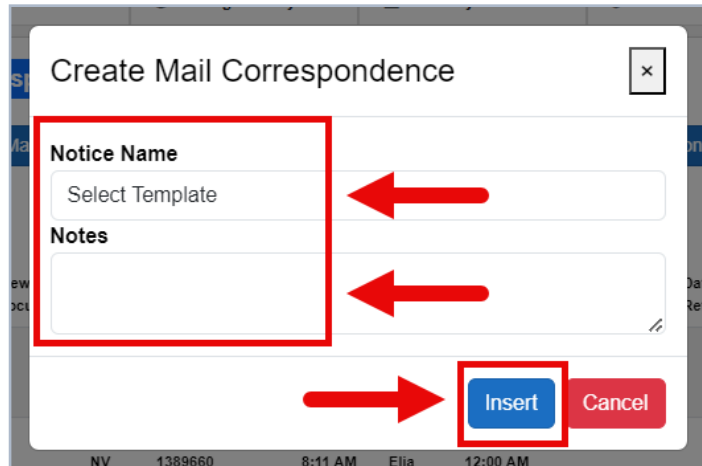
The main content is a table with the following columns: Type, View Document, Notice Name, Notice ID, Notice Notes, Date Created, Created By, Date Sent, Sent By, Elapsed (Days), Date Returned, Returned By, Return Type, Forwarding Address, Forwarding City, Forwarding State, Forwarding Zip, and Is Deleted. The table contains several rows of data, including 'IN PERSON CORRESPONDENCE', 'PHONE CORRESPONDENCE', 'EMAIL CORRESPONDENCE', and 'ADDRESS CHANGE'. Each row has 'Delete' and 'Edit' buttons. A 'View Notice to be Sent' link is present in the first row of the 'ADDRESS CHANGE' section.

Type	View Document	Notice Name	Notice ID	Notice Notes	Date Created	Created By	Date Sent	Sent By	Elapsed (Days)	Date Returned	Returned By	Return Type	Forwarding Address	Forwarding City	Forwarding State	Forwarding Zip	Is Deleted
IN PERSON CORRESPONDENCE		IN PERSON CORRESPONDENCE	N-1488074	In-person correspondence demo	6/18/2024 4:13 PM												False
PHONE CORRESPONDENCE		PHONE CORRESPONDENCE	N-1488073	Phone correspondence demo	6/18/2024 4:08 PM												False
EMAIL CORRESPONDENCE		EMAIL CORRESPONDENCE	N-1488072	Email Correspondence training demo	6/18/2024 3:29 PM		6/18/2024 4:27 PM	RENEE ELIA	0								False
ADDRESS CHANGE	<a href="#">View Notice to be Sent</a>	ADDRESS CHANGE	N-1488071	Mail Correspondence training demo	6/18/2024 3:21 PM												False
FTV-FTV		FTV-FTV	N-1430622		3/21/2023 10:21 AM		3/28/2023 12:00 AM		446						NV		False
VRC-NV		VRC-NV	N-1388660		2/16/2022 8:11 AM		2/17/2022 12:00 AM		851						NV		False
VRC-NV		VRC-NV	N-1378501		1/12/2022 7:38 AM		1/13/2022 12:00 AM		886						NV		False
REJ-IPCL		REJ-IPCL	N-1378459		1/12/2022 5:01 AM		1/13/2022 12:00 AM		886						NV		False

1 to 8 of 8 shown  
10

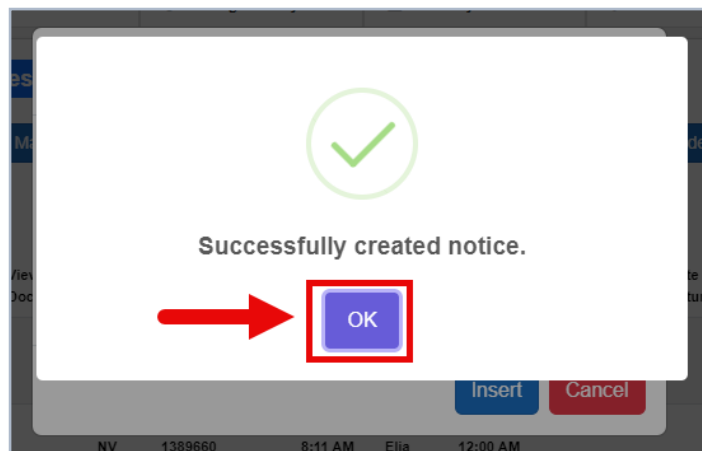
## Mail Correspondence

To add a mail correspondence to the voter's correspondence list, click **[Create Mail Correspondence]**.  
Select a template in the **Notice Name** dropdown.  
Enter **Notes** about the correspondence.  
Click **[Insert]**.

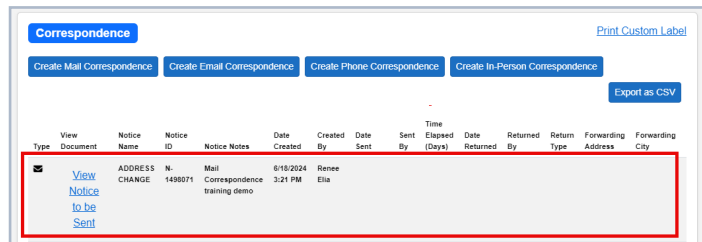


NV 1389660 8:11 AM Elia 12:00 AM

A success notification is displayed.  
Click **[OK]**.



You are returned to the **[Correspondence]** tab on the Voter Profile, and the notice is displayed in the list.



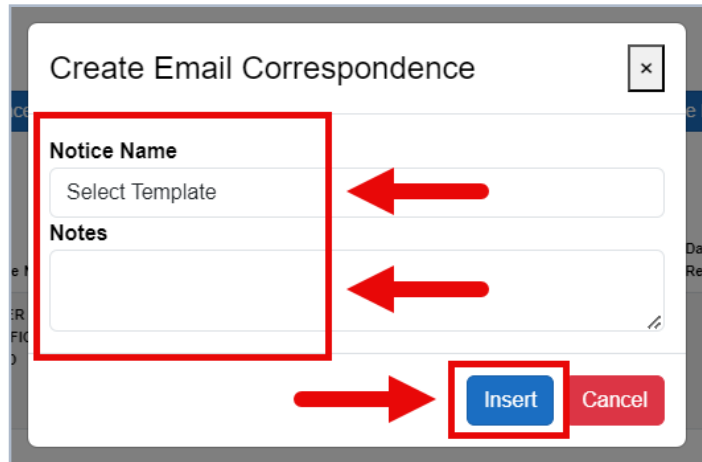
Correspondence [Print Custom Label](#)

[Create Mail Correspondence](#) [Create Email Correspondence](#) [Create Phone Correspondence](#) [Create In-Person Correspondence](#) [Export as CSV](#)

Type	Document	Notice Name	Notice ID	Notice Notes	Date Created	Created By	Date Sent	Sent By	Time Elapsed (Days)	Date Returned	Returned By	Return Type	Forwarding Address	Forwarding City
✉	<a href="#">View Notice to be Sent</a>	ADDRESS CHANGE	N-1498071	Mail Correspondence training demo	6/18/2024	Renee Elia								

## Email Correspondence

To add an in-person correspondence to the voter's correspondence list, click **[Create Email Correspondence]**. Select a template in the **Notice Name** dropdown. Enter **Notes** about the correspondence. Click **[Insert]**.



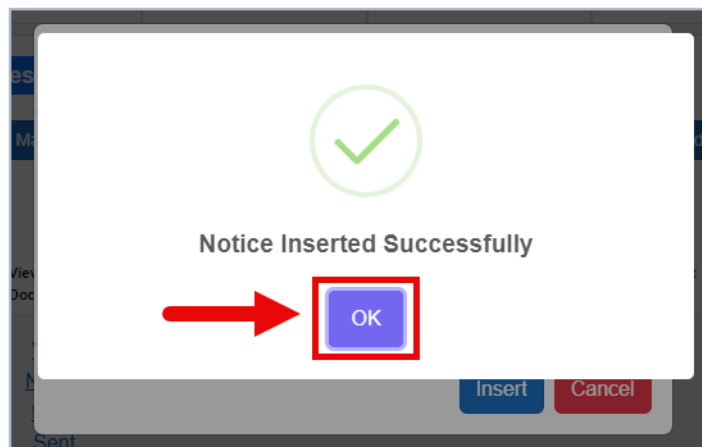
Create Email Correspondence

Notice Name  
Select Template

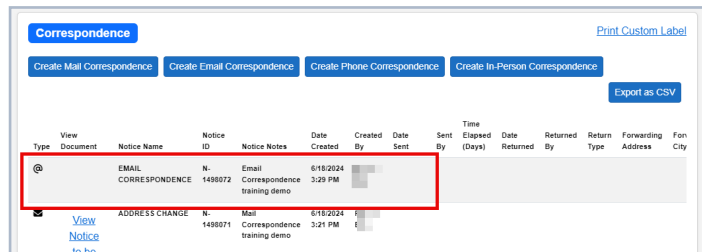
Notes

Insert Cancel

A success notification is displayed. Click **[OK]**.



You are returned to the **[Correspondence]** tab on the Voter Profile, and the notice is displayed in the list.



Correspondence

Create Mail Correspondence Create Email Correspondence Create Phone Correspondence Create In-Person Correspondence

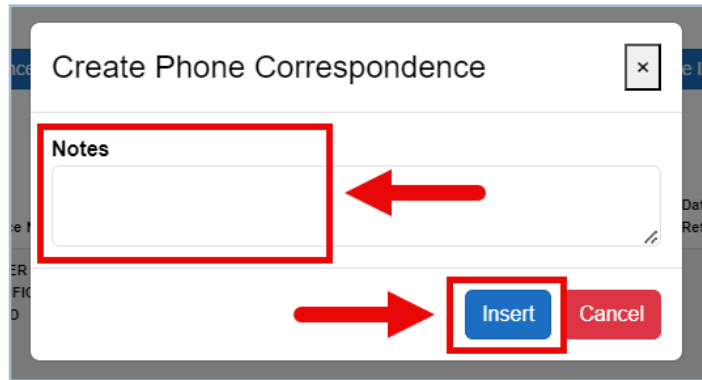
Export as CSV

View	Document	Notice Name	Notice ID	Notice Notes	Date Created	Created By	Date Sent	Sent By	Time Elapsed (Days)	Date Returned	Returned By	Return Type	Forwarding Address	For City
@	EMAIL	EMAIL CORRESPONDENCE	N. 1498072	Email Correspondence training demo	6/19/2024		3:29 PM							
		ADDRESS CHANGE	N. 1498071	Mail Correspondence training demo	6/19/2024		3:21 PM							

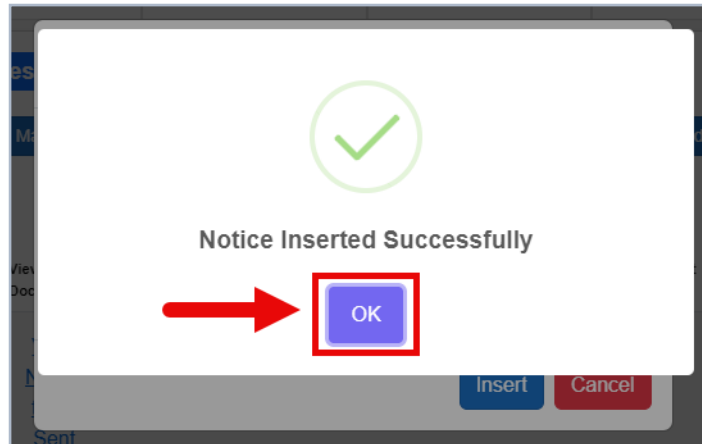
View Notice to be

## Phone Correspondence

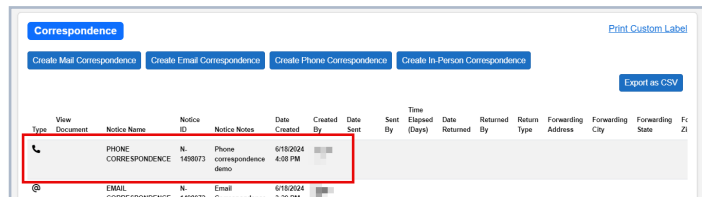
To add a phone call correspondence to the voter's correspondence list, click **[Create Phone Correspondence]**. Enter **Notes** about the correspondence. Click **[Insert]**.



A success notification is displayed. Click **[OK]**.



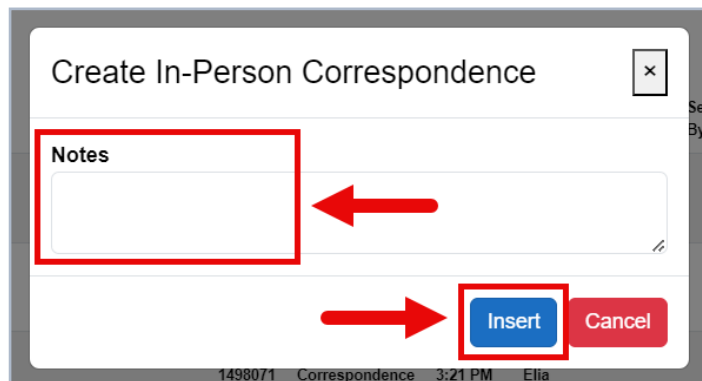
You are returned to the **[Correspondence]** tab on the Voter Profile, and the notice is displayed in the list.



Type	Document	Notice Name	Notice ID	Notice Notes	Date Created	Created By	Date Sent	Time Sent	Time Elapsed (Days)	Date Returned	Returned By	Return Type	Forwarding Address	Forwarding City	Forwarding State	Forwarding ZIP
PHONE	CORRESPONDENCE	N	1498073	Phone correspondence demo	6/18/2024		4:08 PM									
EMAIL	CORRESPONDENCE	N	1498073	Correspondence	6/18/2024		3:20 PM									

## In-Person Correspondence

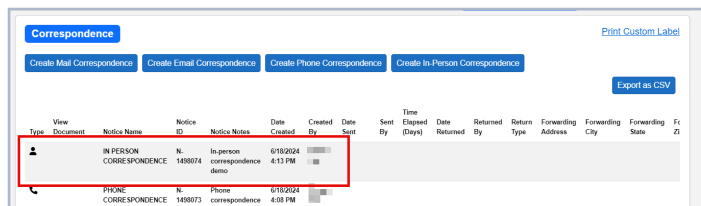
To add an in-person correspondence to the voter's correspondence list, click **[Create In-Person Correspondence]**. Enter **Notes** about the correspondence. Click **[Insert]**.



A success notification is displayed.  
Click **OK**.



You are returned to the **Correspondence** tab on the Voter Profile, and the notice is displayed in the list.



A screenshot of the "Correspondence" tab in a voter profile system. The page has a header with "Correspondence" and a "Print Custom Label" link. Below the header are four tabs: "Create Mail Correspondence", "Create Email Correspondence", "Create Phone Correspondence", and "Create In Person Correspondence". There is also an "Export as CSV" button. The main area contains a table with the following data:

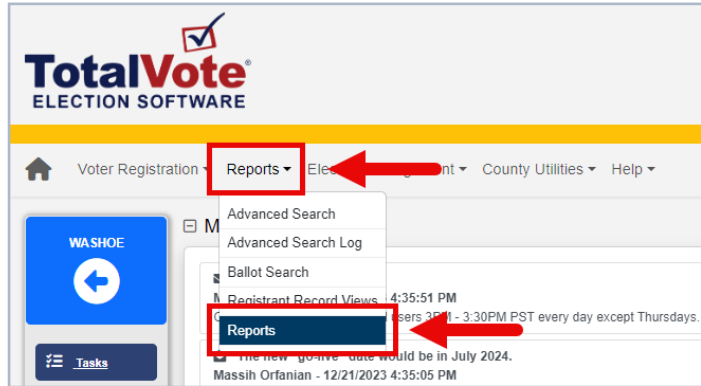
View	Type	Document	Notice Name	Notice ID	Notice Notes	Date Created	Created By	Date Sent	Time Sent	Time Elapsed (Days)	Date Returned	Returned By	Return Type	Forwarding Address	Forwarding City	Forwarding State	Forwarding ZIP
			IN PERSON CORRESPONDENCE	N 149074	In person correspondence demo	6/10/2024 4:13 PM											
			PHONE CORRESPONDENCE	N 149073	Phone correspondence	6/10/2024 4:08 PM											

# Reporting

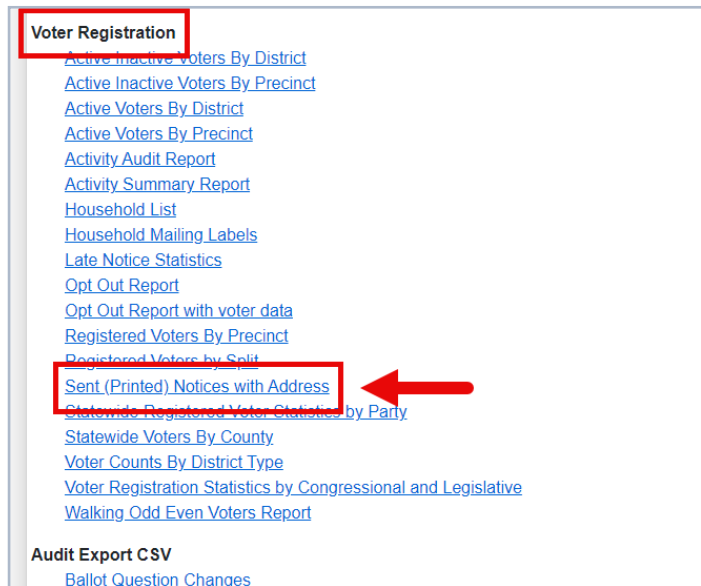
To run a report of notices sent to voters for a specific timeframe and/or notice type, you can run the **Sent (Printed) Notices with Address** canned report in TotalVote.

## Running the Sent Notices Reports

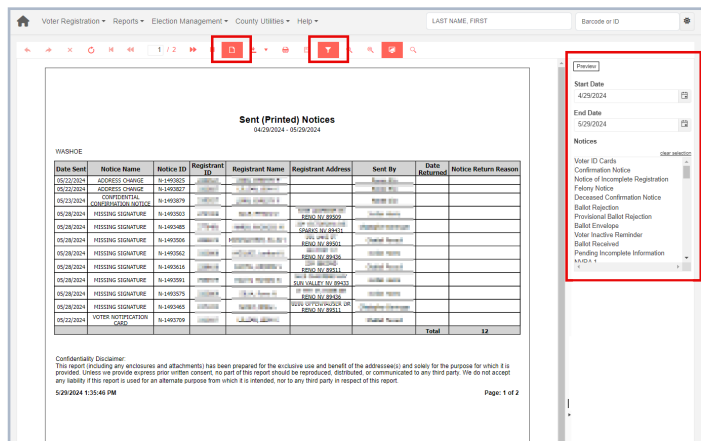
From the Navigation bar, select **Reports > Reports**.



Under the **Voter Registration** section, select **Sent (Printed) Notices with Address**.



The **Sent (Printed) Notices** Report Builder screen is displayed. The Print Preview icon [🖨️] and Parameters Filter icon [⚙️] is toggled on (solid orange).

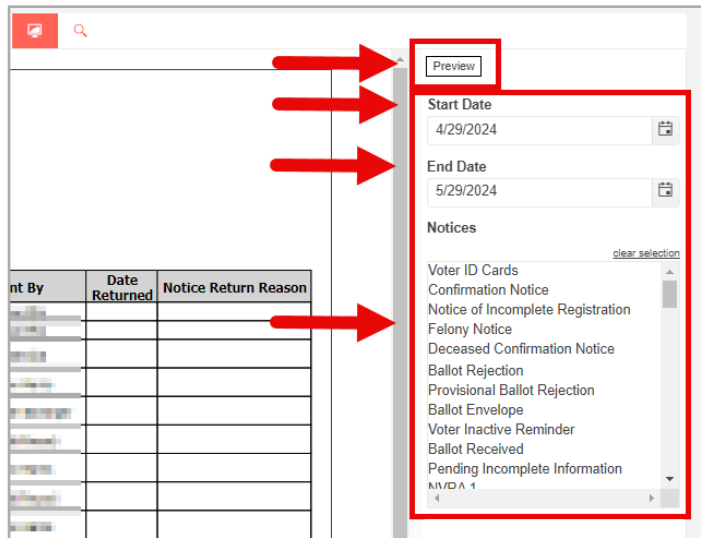




Use the **report toolbar** to adjust the **view**, and **search** in the report's contents.

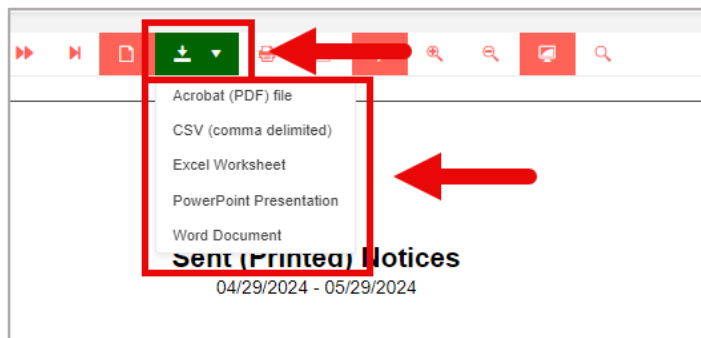


Update the **Start Date**, **End Date**, and **Notices** type parameters, as needed. Click **[Preview]** to refresh the report.

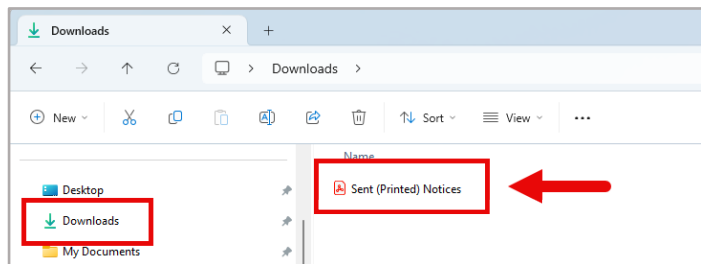


### Downloading the Sent Notices Report

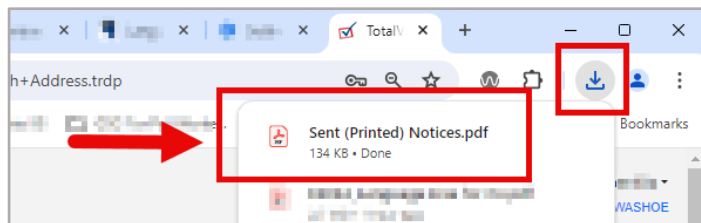
Navigate to the Report Builder screen. To download the report, click the Download icon [📄] in the report toolbar. Select a desired file format from the file format options.



The file is downloaded in the selected format in a background process to the **Downloads** folder on your computer. Double-click on the file to open it. Continue processing the file according to your county process.

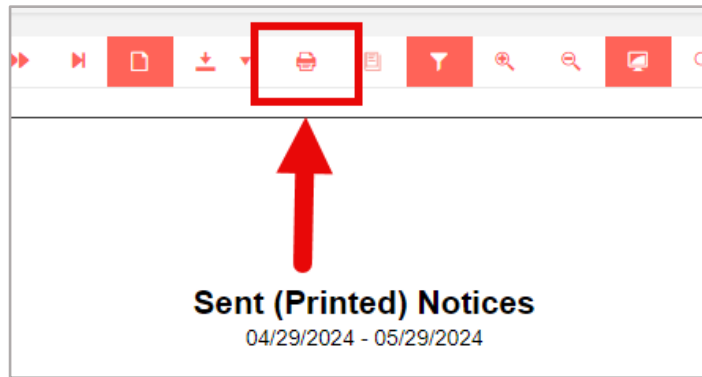


**TIP:** Click the Download icon [📄] in the browser to open your **Recent Download History**. Click on the file to open it.

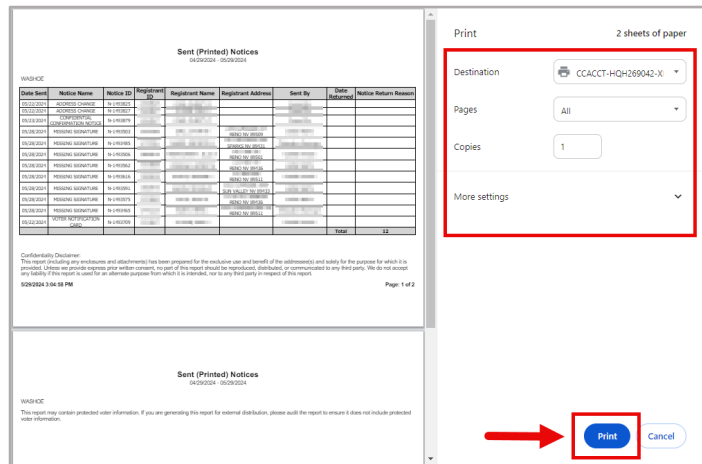


### Printing the Sent Notices Report

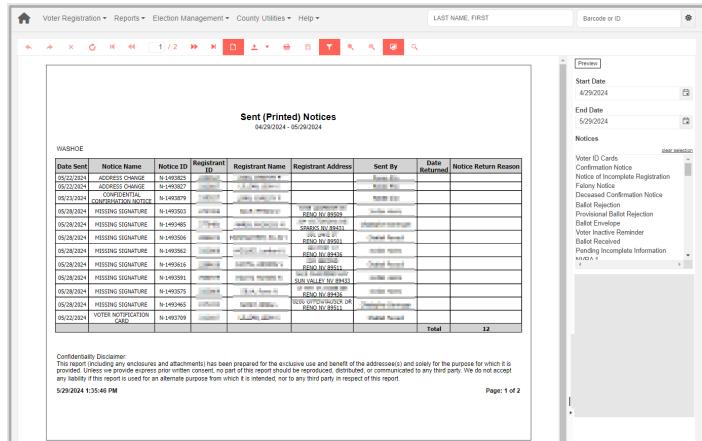
Navigate to the Report Builder screen. To print the report, click the click the Printer icon [🖨] in the report toolbar.



A **Print** dialog box opens. Select the appropriate **Destination** printer. Update other print settings as needed. Click [**Print**].



The notice is sent to the Destination printer to be printed. The Print dialog box closes, and you are returned to the Sent (Printed) Notices screen



**Next Step:** Processing Returned Notices

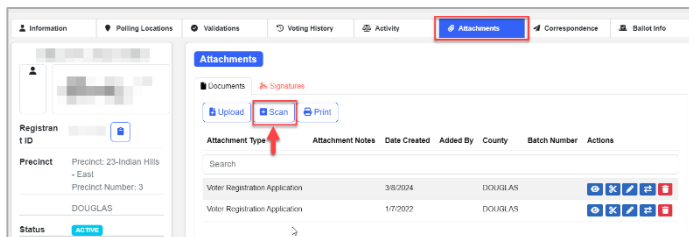
## Processing Forms and Returned Notices

This document covers processes required to identify the signature area of a form or notice, and to scan and attach individual forms to a voter profile.

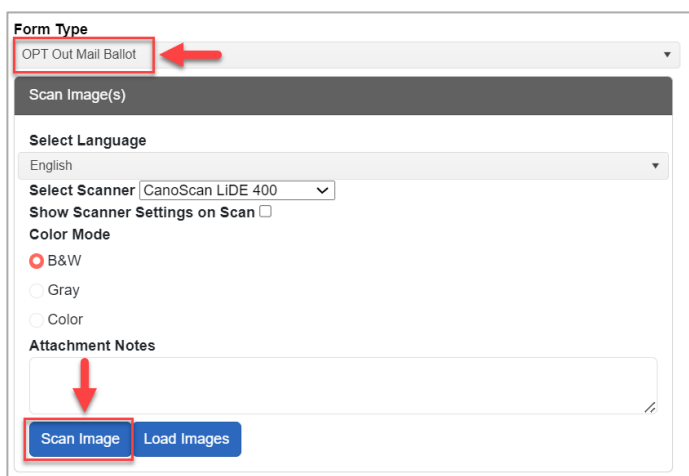
### Scanning a Form or Returned Notice

Process individual forms from the **Attachments** tab of the Voter Profile.

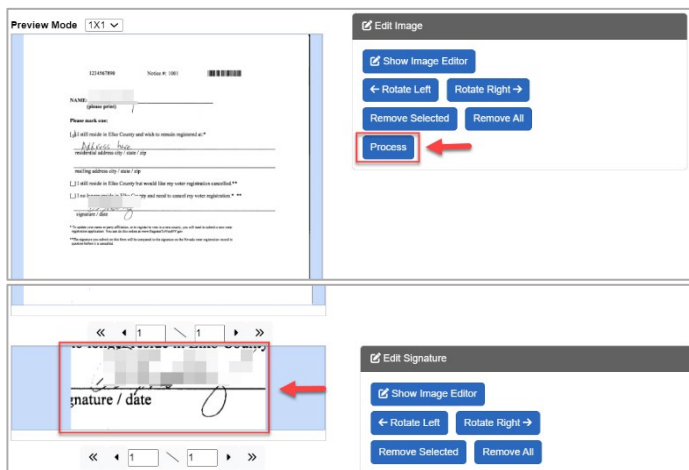
Locate the voter profile using Quick Search and select the **Attachments** tab.  
Click **Scan**.



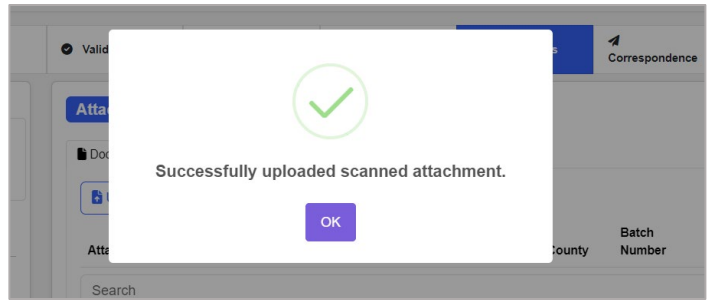
Select Form Type and [Scan Image].  
**Note:** If no **Form Type** is selected, Scanner settings will be blank and cannot be selected.



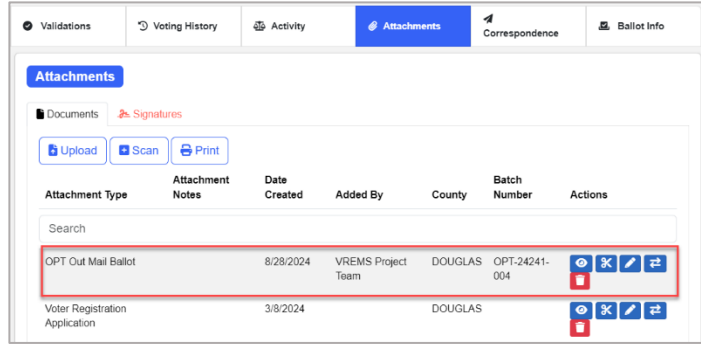
Scroll down and note that the signature is displayed in a separate image editor box.  
Confirm the signature is displayed correctly and scroll back up to select **Process**.



TotalVote displays Successfully uploaded scanned attachment. Click **[OK]**.



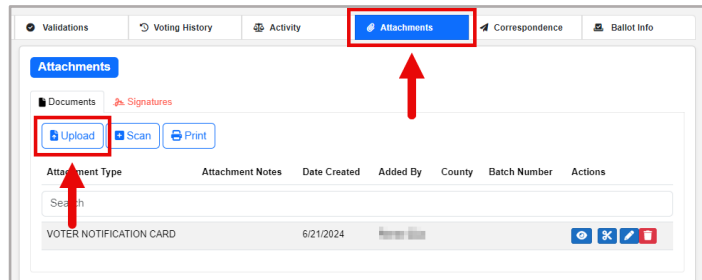
Confirm the scanned notice is now an Attachment in the voter profile.



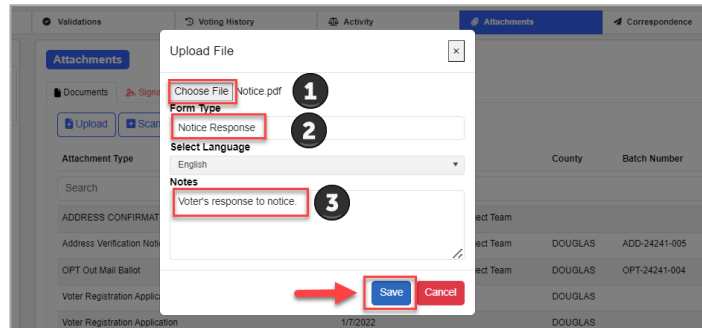
## Uploading a Form or Notice

Forms and notices can be scanned in groups and individually attached to voter profiles.

Scan and save notices individually. Locate the Voter Profile and select the **[Attachments]** tab. Click **[Upload]**.

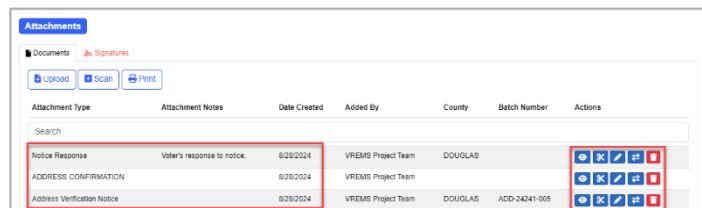


1. **[Choose File]** and navigate to the scanned notice and **[Open]**.
2. Select the **Form Type**. If the item is a voter response, select **Notice Response**.
3. Add explanatory **Notes**. Click **[Save]**.



Confirm the uploaded file is displayed in the list of Attachments.

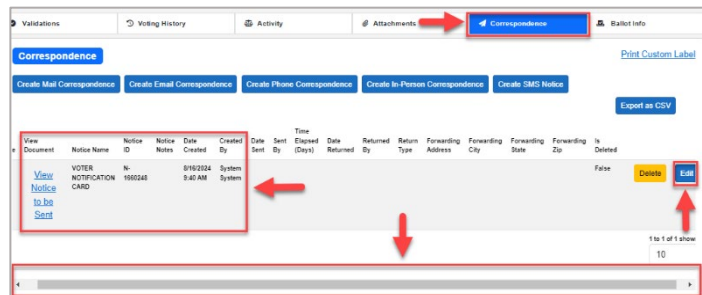
**TIP:** Attached notices can be viewed, used for signature clip, edited, transferred or deleted using the **Action** icons.



## Updating Correspondence Activity

If the items added to Attachments was in response to a Notice, locate that Sent Notice and update the record with information from the Returned Notice.

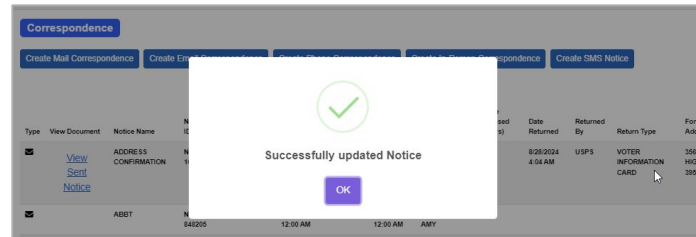
Locate the Sent notice in the **[Correspondence]** tab. Scroll to the right and click **[Edit]**. **Note:** If **[Edit]** is not displayed, use **[Ctrl]-[-]** to zoom out or use the horizontal scroll bar to scroll right.



Complete details about the returned notice and **[Save]**.

**Edit Notice**  
 Notes: Received forwarding address.  
 Date Returned: Wednesday, August 28, 2024 11:04:52 AM  
 Returned By: USPS  
 Return Type: VOTER INFORMATION CARD  
 Forwarding Address: HIGHWAY 395, #12  
 Forwarding City: MINDEN  
 Forwarding State: NV  
 Forwarding Zip: 89423  
 [Save] [Cancel] [Print Label]

TotalVote prompts Successfully updated Notice. Click **[OK]**.



Confirm that Notes and notice return details are updated in the **[X Correspondence]** tab.

Type	Document	Notice Name	Notice ID	Notes	Date Created	Date Sent	Time Elapsed (Days)	Date Returned	Returned By	Return Type	Forwarding Address	Forwarding City	Forwarding State	Forwarding Zip	In Deleted
	View Sent Notice	VOTER NOTIFICATION CARD	14888	Received voter notification card notice on 8/28/2024. Updated to attachments.	8/21/2024 2:08 PM	8/21/2024 2:08 PM		8/28/2024 2:04 AM	USPS	VOTER INFORMATION CARD	3581 HIGHWAY 395, #12	MINDEN	NV	89423	False

Note that each form or notice sent to or received from the voter is recorded in the **[X Activity]** tab under **Registrant Record Actions**.

Action	User	County	Date Changed
Uploaded Attachment (20240828T162421688_BaseFileName.pdf)	VREMS Project Team	DOUGLAS	8/28/2024 9:24 AM
Uploaded Attachment (20240828T160231851_BaseFileName.pdf)	VREMS Project Team	DOUGLAS	8/28/2024 9:02 AM
Uploaded Attachment (2024/03/img_3260517_4110715.jpg)	System		3/8/2024 12:58 AM

## Merging Duplicate Profiles

The process of consolidating the voter data from all Nevada counties into a single voter registration database will naturally result in multiple profiles for any voter who moved between Nevada counties. Initial database “cleanup” will require counties to work through all the duplicates TotalVote identifies based on unique personal identifying information (e.g., DOB, SSN4, DL#).

Potential duplicates are organized into two Task queues – in-county matches and out of county matches. Counties can also merge known duplicates that do not show up in a Duplicates task queue.

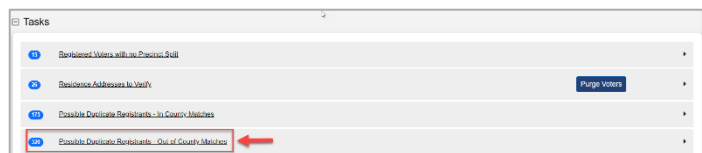
Out of county record matches will show up in the Task queue of all counties impacted by the duplication. Any county can handle the merge. The county of current residence is the county that will issue the new Voter Notification Card.

This document covers two methods of merging duplicate profiles.

### Merging Duplicates from the Task Queue


In-County and Out of County duplicates are processed from different Task queues using the same steps.

From the TotalVote Dashboard Task queue, select Possible Duplicate Registrants – Out of County Matches or Possible Duplicate Registrants – In County Matches.



Duplicates are listed in alphabetical order by last name. Each line represents a unique voter profile. Click into any column heading to sort the rows in any other order.

Registrant ID	Name	Resident Address	City	Zip	DOB	Status	Status Reason	County	Date Added	Actions
241851	Krista A.		CARSON CITY	89700		PLURIBUS	INCOMPLETE	DOUGLAS	5/28/2024 10:02:03 PM	Process
241724	Krista Ann		GARDINERVILLE	89410		ACTIVE	ACTIVE	DOUGLAS	5/28/2024 10:02:03 PM	Process
241850	Dawn A.		GARDINERVILLE	89410		PENDING	INCOMPLETE	DOUGLAS	5/28/2024 10:02:03 PM	Process
241621	Dorcas Jane		GARDINERVILLE	89410		ACTIVE	ACTIVE	DOUGLAS	5/28/2024 10:02:03 PM	Process
241843	Alice J.		SPARKS	89435		PENDING	INCOMPLETE	DOUGLAS	5/28/2024 10:02:03 PM	Process
241845	Alice J.		SPARKS	89420		ACTIVE	ACTIVE	DOUGLAS	5/28/2024 10:02:03 PM	Process
241853	Aria M.		GARDINERVILLE	89410		PENDING	INCOMPLETE	DOUGLAS	5/28/2024 10:02:03 PM	Process
241855	Aria Marie		GARDINERVILLE	89410		ACTIVE	ACTIVE	DOUGLAS	5/28/2024 10:02:03 PM	Process

To create an audit trail, click  in the upper right corner of the Task queue to export a CSV of all records.

Click **[Process]** on either line of a pair of profiles to launch the merge process.

Registrant ID	Name	Resident Address	City	Zip	DOB	Status	Status Reason	County	Date Added	Actions
	Andrew		ZEPHYR COVE	89410		ACTIVE	ACTIVE	DOUGLAS	05/13/2024	Process
	ANDREW		SPARKS	89431		INACTIVE	33 DAY PROCF SR	WASHOE	06/25/2023	Process

Compare the two records paying special attention to personal identifying information (DOB, DL#, SSN4), status, and **Effective Date of Change**.

The record with the most recent Effective Date of Change will most likely (but not always) be the best record to designate as the surviving record.

If the records match, **select the most current** and click **[Merge]**.

Possible Duplicate Registrants

Out of County Match  
Match Type:  
Status: PENDING  
Select the record to be kept as the surviving record.

Previous Next

	Record 1	Record 2
County	DOUGLAS	WASHOE
Registrant ID		
Registration Date	5/13/2024	6/20/2023
County Registration Date		6/20/2023
Effective Date of Change	5/13/2024	6/20/2023
Status	ACTIVE	INACTIVE
Status Reason	ACTIVE	33 DAY PROCESS
Name		
DOB		
SSN4		
DL/ID #		
Residence Address		
Mailing Address		
Party	REP	REP
Previous Name		
Last Voted		
Parent Name		
State or County of Birth	NV	NV
Early Voter	No	No
Default Signature		

Merge Dismiss Hold Close

A Merge Confirmation warning is displayed.

**Confirm you have selected the correct record** as the surviving record, then click **[OK]**.

**IMPORTANT: Merge carefully!** There is no "undo" function for Merged records. If you incorrectly merge a record, contact the VREMS Help Desk for assistance.

Possible Duplicate Registrants

Out of County Match  
Match Type:  
Status: PENDING  
Select the record to be kept as the surviving record.

Previous Next

	Record 1	Record 2
County	DOUGLAS	WASHOE
Registrant ID		
Registration Date	5/13/2024	6/20/2023
County Registration Date		6/20/2023
Effective Date of Change	5/13/2024	6/20/2023
Status	ACTIVE	INACTIVE

Merge Confirmation

This will merge the following records: (Registrant ID: ) and (Registrant ID: ) Are you sure you want to proceed?

OK Cancel

TotalVote generates a Voter Notification Card for the surviving profile.

**Note:** The Voter Notification Card will be found in Unsent Notices for the receiving county, no matter which county completed the merge process.

Registration Date

County Registration Date

Effective Date of Change

Status

Status Reason

Name

DOB

SSN4

DL/ID #

Residence Address

Mailing Address

GARDNERVILLE, NV 89460

SPRING CREEK, NV 89815

Voter Notification Card notice has been created

Ok



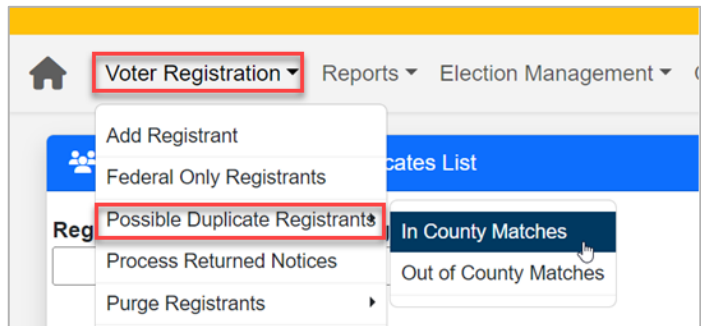
TotalVote retains the signature of the merged record if the surviving record did not have a signature. Click **[Next]** to go to the next record in that queue or **[Close]**.



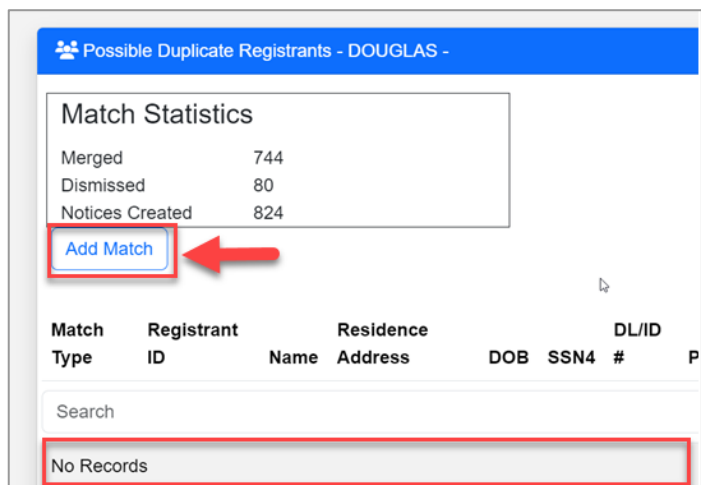
### Merging Specific Profiles

If TotalVote has not flagged duplicate voter profiles, merge duplicate profiles directly.

From the Navigation bar, select **Voter Registration > Possible Duplicate Registrants.52**



If the duplicate is not listed, click **[Add Match]**.



Enter voter profile ID numbers in the Registrant ID:\* fields and click [Display].

**Add Match To Possible Duplicates List**

Registrant ID:\*

Registrant ID:\*

Cancel

The names of the registrants are displayed below each ID. If the names match, click [Continue].

**Add Match To Possible Duplicates List**

Registrant ID:\*

Registrant ID:\*

, David Anthony  , David Anthony

Cancel

Carefully compare the two records and [Merge] as above.5

**Possible Duplicate Registrants**

Out of County Match  
Match Type:  
Status: PENDING  
Select the record to be kept as the surviving record.

Previous

	Record 1	Record 2
County	DOUGLAS	WASHOE
Registrant ID	<input type="text"/>	<input type="text"/>
Registration Date	5/13/2024	6/20/2023
County Registration Date		6/20/2023
Effective Date of Change	5/13/2024	6/20/2023
Status	ACTIVE	INACTIVE
Status Reason	ACTIVE	33 DAY PROCESS
Name	<input type="text"/>	<input type="text"/>
DOB	<input type="text"/>	<input type="text"/>
SSN4	<input type="text"/>	<input type="text"/>
DL/ID #	<input type="text"/>	<input type="text"/>
Residence Address	<input type="text"/>	<input type="text"/>
Mailing Address	<input type="text"/>	<input type="text"/>
Party	REP	REP
Previous Name	<input type="text"/>	<input type="text"/>
Last Voted	<input type="text"/>	<input type="text"/>
Parent Name	<input type="text"/>	<input type="text"/>
State or County of Birth	NV	NV
Early Voter	No	No
Default Signature	<input type="text"/>	<input type="text"/>

# Setting Up Polling Places

This document covers processes associated with setting up Polling Places in TotalVote.

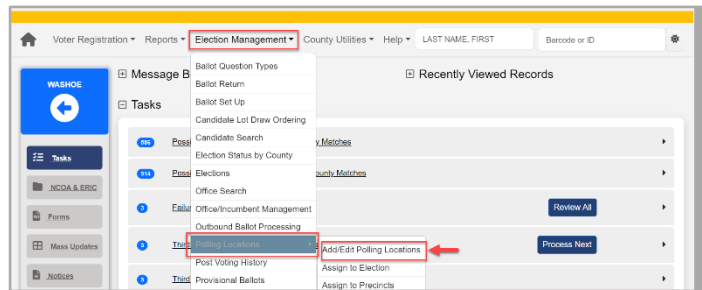
To set up TotalVote for the first time, create and then assign polling places to the election. Going forward, copy polling locations from a prior election, adding and updating polling place information as needed.

## Creating Polling Places

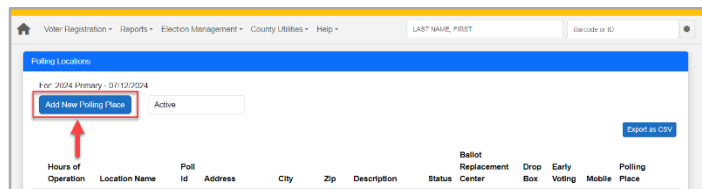
If a polling place will serve *both* **Early Voting** and **Election Day**, create two profiles, e.g., -Firehouse\_EV and Firehouse\_ED.

Create a **separate profile** for ballot **Drop Box-only** locations, e.g., GIDOffice\_DB. Ensure **Polling Place** and **Vote Center** check boxes are blank for those locations.

On the Navigation bar, select Election Management > Polling Locations > Add/Edit Polling Locations.

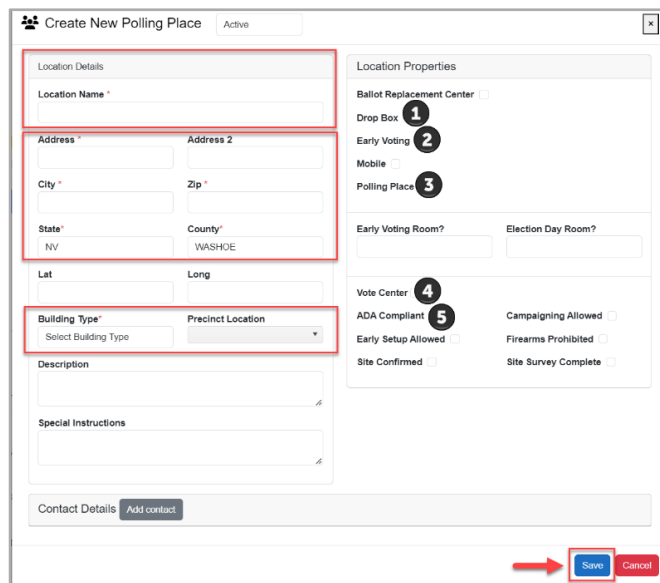


Click [Add New Polling Place]. The Create New Polling Place screen appears.



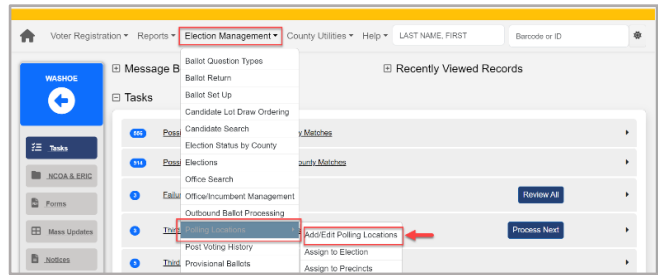
Provide a Location Name, enter required\* Location Details and Location Properties, and [Save]. Essential **Location Properties** include:

- **Drop Box**
- **Early Voting**
- **Polling Place**  
Location that can only serve voters from specific precincts (*This is not a common situation.*)
- **Vote Center**  
Location that can serve voters from any county precinct
- **ADA Compliant**  
Meets [eac.gov Best Practices: Accessibility In-Person Voting](https://www.eac.gov/best-practices-accessibility-in-person-voting)



## Printing a Polling Place Listing

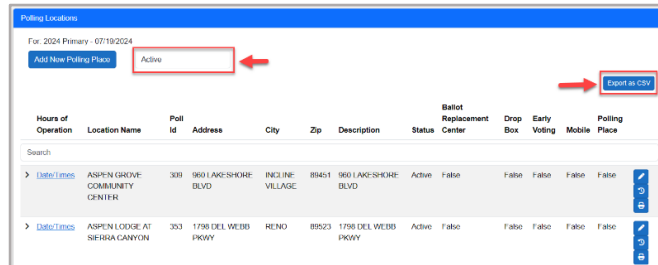
On the Navigation bar, select Election Management > Polling Locations > Add/Edit Polling Locations.



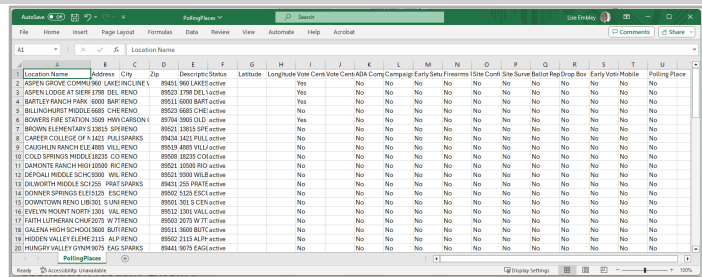
On the Polling Locations screen, click [Export as CSV].

TotalVote exports a list of polling places and location properties that match the selected status (in this example, **Active**).

**TIP:** Use [Export as CSV] to review **Inactive** or **On Hold** locations before assigning polling places to an election.

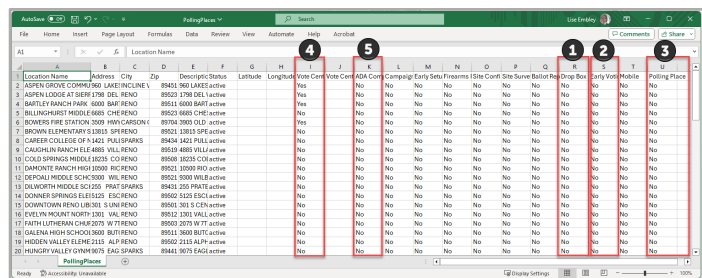


Double click on the file link in the Downloads folder to open the .csv file in your system's default spreadsheet application (usually Excel). Save the .csv file in spreadsheet format.



To group polling places by a specific setting, use spreadsheet sort functionality:

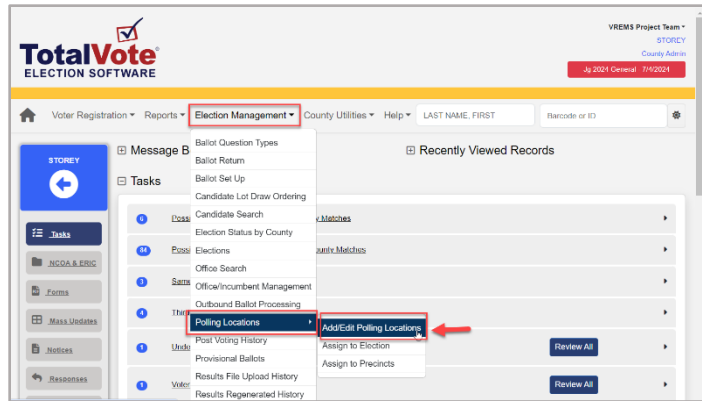
- Drop Box
- Early Voting
- Polling Place
- Vote Center
- ADA Compliant




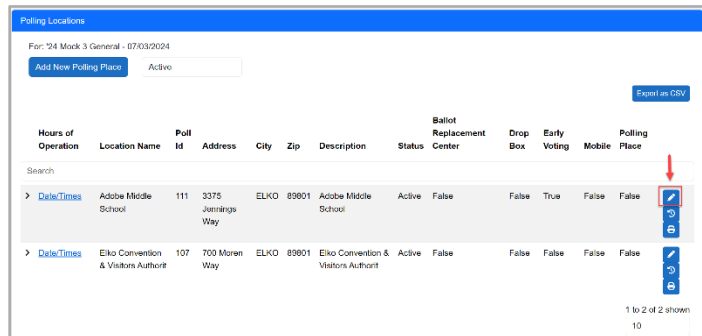
## Assigning Polling Places to Elections

Check location details and status of polling locations and adjust as needed.

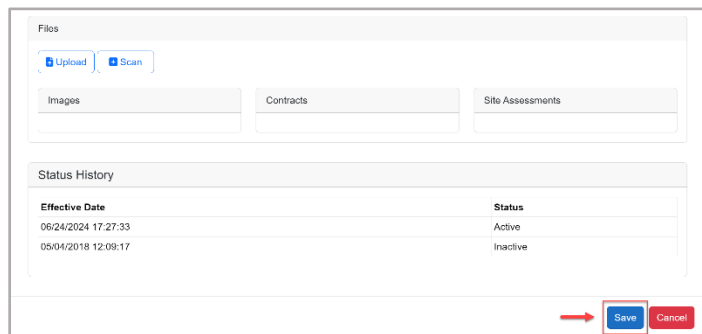
From the Navigation bar, select Election Management > Polling Locations > Add/Edit Polling Locations.



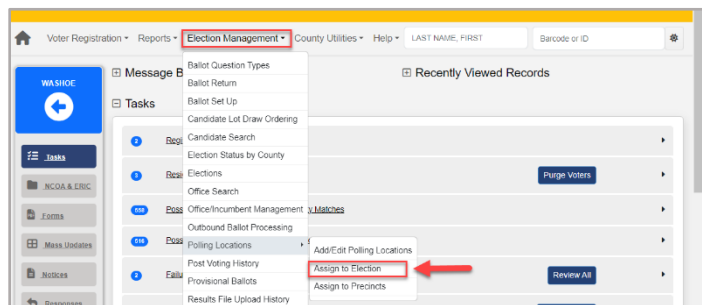
Select  to edit a Polling Place profile.



Make any necessary changes and click **[Save]**.



From the Navigation bar, Select Election Management > Polling Locations > Assign to Election. **NOTE:** Only **Active** status locations are listed and available to be assigned to an election.



Select the current **Election** from the dropdown list.  
Click **ALL** to set that location as a Vote Center accessible to voters from all precincts in the county, or choose specific precincts the polling place will serve, and **[Save Changes]**.

Assign Polling Places to Election Save Changes Cancel Changes

Election  
6.3 KI State Training - 07/23/2024 - 1905

- ALL
- Douglas County Community Center - DB
- Douglas County Community Center - ED
- Douglas County Community Center - EV
- GAXLKU
- Historic Courthouse
- Indian Hills GID Office

## Copying Polling Place Selections

If polling places were assigned to prior elections, select **Copy Polling Places from Election to Election**.

Assign Polling Places to Election Save Changes Cancel Changes

Election

Copy Polling Places from Election to Election

*This will allow copying all polling places from one election to the other.*

Choose Source Election and Destination Election from dropdown lists and click **[Copy Polling Places to Destination]**. The system confirms "Copied polling places to the destination election." Click **[OK]** and **[Save Changes]**.

Assign Polling Places to Election Save Changes Cancel Changes

Election

Copy Polling Places from Election to Election

*This will allow copying all polling places from one election to the other.*

**Source Election (Election to copy polling places from)**  
Presidential Preference 24 - 02/06/2024 - 212

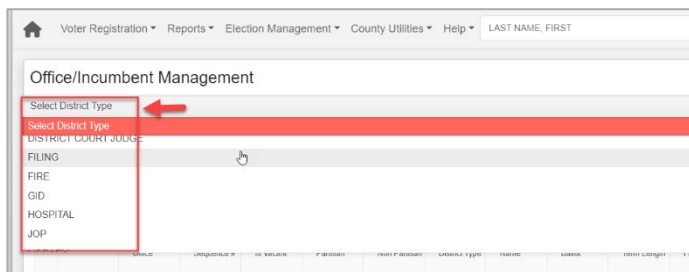
**Destination Election (Election to copy polling places to)**  
2024 Municipal MM - 09/25/2024 - 1765

Copy Polling Places to Destination

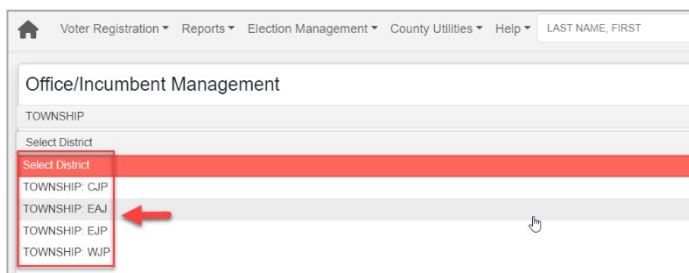
## Entering Incumbents

This document covers processes associated with entering Incumbent information in TotalVote.

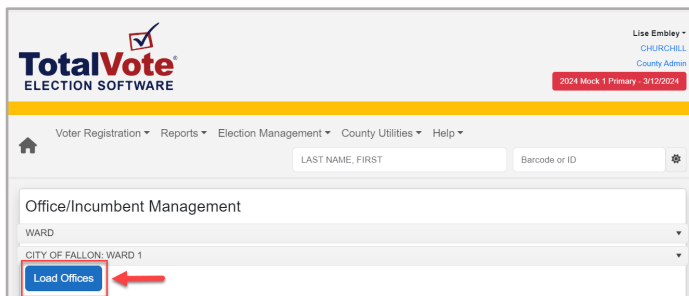
From the Navigation Bar, select Election Management > Office/Incumbent Management. Click the **Select District Type** menu bar and select the **District Type**.



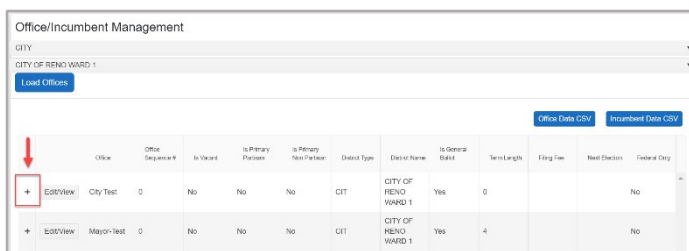
If there are multiple districts within a District Type, click **Select District** and select the **District**.



With the District Type and/or District selected, click **[Load Offices]**.



Click **[+]** to display blank **Incumbent** detail.



If no Incumbent is listed for the Office selected, click [+Add Incumbent]. Enter required\* Incumbent information and [Save].

Incumbents

First Name \* Last Name \* Display Name

Term Type Term Start Term End

Select Term MM/dd/yyyy MM/dd/yyyy

Address 1 Address 2 Address 3

Party Code Website Email

Phone Fax

Phone 2 Fax 2

Selected Resignation Date

Select Placement MM/dd/yyyy

Cancel Save

To review all Incumbent information, return to the Office/Incumbent Management screen and click [Incumbent Data CSV].

Office/Incumbent Management

COUNTY

Load Offices

Office Data CSV Incumbent Data CSV

	Office	Office	In Vacant	Is Primary	Is Primary	District	District	Is General	Term Length	Play Role	Next Position	Previous Day
	Code	Reference #		Position	Role Position	Type	Name	Master				
+ Edit/View	ASSESSOR	11240	No	No	No	CTY		No	4		06/09/2026	No
+ Edit/View	CLERK-TREASURER	11415	No	No	No	CTY		No	4		06/09/2026	No
+ Edit/View	DISTRICT ATTORNEY	11615	No	No	No	CTY		No	4		06/09/2026	No

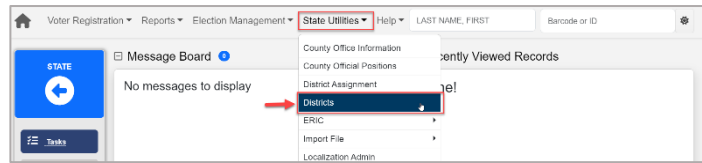


## Setting Up an Election – State

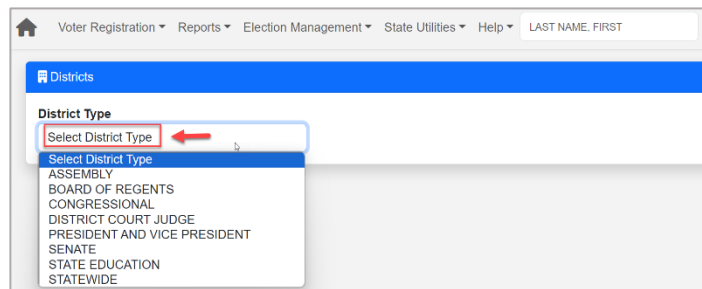
The state is responsible for creating state-wide, multi-jurisdictional, and state-level elections (primaries, generals, special, or recall elections), and adding all state-level or multi-jurisdictional contests and candidates. Once created, counties are responsible for adding local contests, candidates, and ballot questions.

### Reviewing Districts

To view each District type and the associated Precincts, select **State Utilities > Districts** from the Navigation Bar.



Click into the **District Type** field and select a **District Type** from the dropdown list.

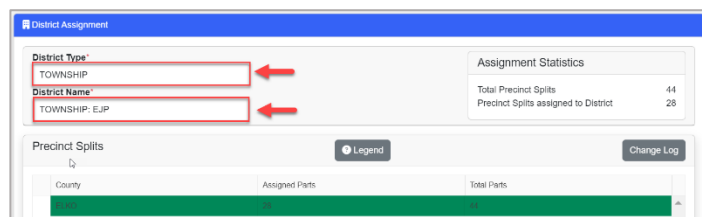


A listing of each District number, shared counties, and total active and inactive registrants is displayed.

A screenshot of the 'Districts' table. The table has columns for PD Number, Name, Shared Counties, Description, and Active and Inactive Regi. The data is as follows:

PD Number	Name	Shared Counties	Description	Active and Inactive Regi.
08	REGENT DISTRICT 08	ELKO, EMERALDA, EUREKA, LINCOLN, NYE, WHITE PINE		63,949
09	REGENT DISTRICT 09	CARSON CITY, CHURCHILL, DOUGLAS, LANDER, LYON, MINERAL, STOREY, WASHOE		165,696
10	REGENT DISTRICT 10	WASHOE		157,136
11	REGENT DISTRICT 11	HUMBOLDT, PERSHING, WASHOE		154,822

To modify a District, select County Utilities > District Type > District Name. For more information, see Verifying Districts and Precinct Assignments.



To modify Precincts, select **County Utilities > Precinct Splits**.

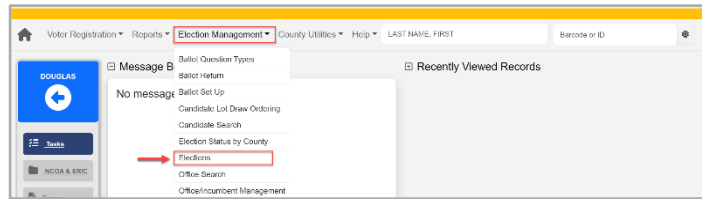
A screenshot of the 'Precinct Splits' table. The table has columns for County, Precinct Split, and # of Registrants. The data is as follows:

County	Precinct Split	# of Registrants
ELKO	01.00	1,747
ELKO	02.00	1,446
ELKO	03.00	1,277
ELKO	04.00	1,387

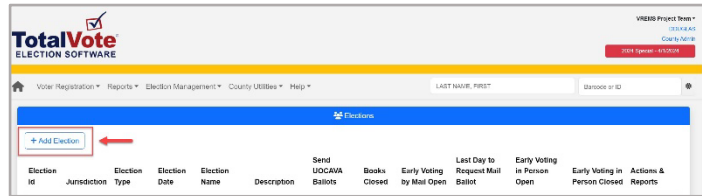
## Creating the Election

If the election is part of a state-wide or multi-jurisdiction election, add a new election.

From the Navigation Bar, select **Election Management > Elections**.



Click [+Add Election].



**Jurisdiction** defaults to STATE. Select the Election Type. The system suggests an election name, which can be modified. Update the **Name** as needed. Enter an Election Abbreviation.

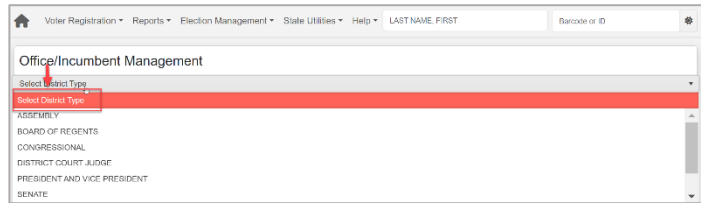
Enter the **Date**. Required\* date fields populate automatically based on the \***Election Date**.

**Note: Filing Start:** and **Filing End:** are not currently managed in TotalVote. Scroll to the bottom and **[Save]**. Once the new election is saved, it becomes the selected election.

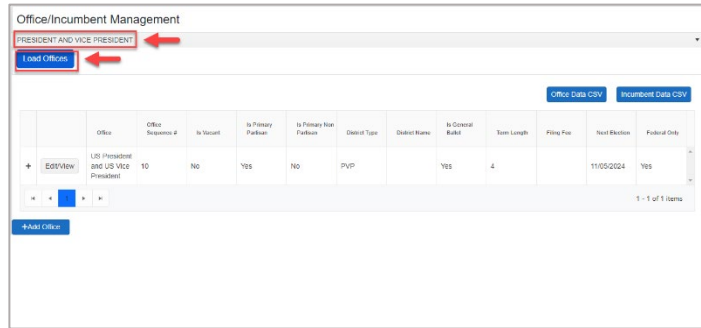
## Confirming Offices

Offices to be included in the election are pulled from Offices/Incumbents data in TotalVote. It is essential to ensure they are accurate.

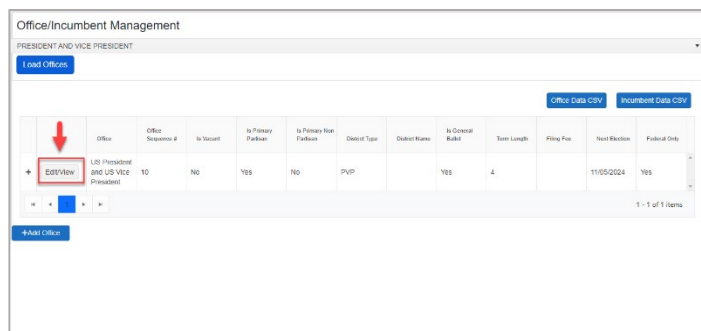
From the Navigation Bar, select Election Management > Office/Incumbent Management. Click the **Select District Type** menu bar and select the **District Type**.



With the District selected, click **[Load Offices]**.



Click **[Edit/View]** to review each Office.



Review/enter the following **Office** fields and **[Save]**.

- If **Is Vacant** is selected, the **Office** will be included in **Ballot Setup** based on **Next Election** date.
- **Is General** triggers inclusion on General Election ballots.
- **Is Active** must be selected for the office to be added to a Ballot.
- **Term\*** triggers ballot inclusion in relevant future elections.
- **Office Sequence Number** is based on the state's assigned range; specifies the office's placement on the ballot. See [Appendix: Office Sequence Numbers](#)
- **Next Election:** Enter date of next election (e.g., 11/05/2024)
- **Federal Only.** This checkbox must be selected for this office to appear on a Federal Only (Precinct 99) ballot.

The screenshot shows the 'Office' configuration form. Key fields are highlighted with red boxes and numbered callouts: 1. Base District Type (PRESIDENT AND VICE PRESIDENT), 2. Is General (checked), 3. Is Active (checked), 4. Term (4), 5. Office Sequence Number (10), 6. Next Election (11/05/2024), and 7. Federal Only (checked). A red arrow points to the 'Save' button at the bottom right.

Verify each office associated with the District.

The screenshot shows the 'Office/Incumbent Management' table. A red arrow points to the 'Edit View' button for the second row, which corresponds to 'CONGRES SIGNAL DISTRICT 4'.

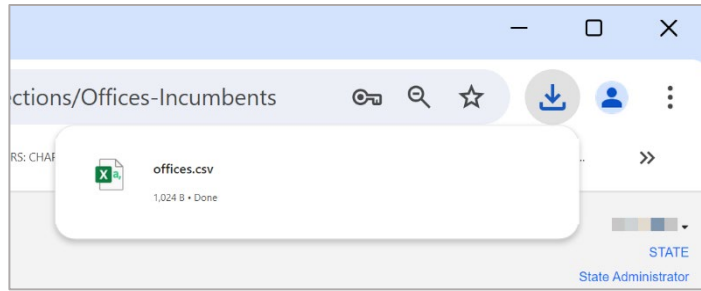
	Office	Office Sequence #	Is Vacant	Is Primary Partisan	Is Primary Non-Partisan	District Type	District Name	Is General Ballot	Term Length	Filing Fee	Next Election	Federal Only
+	CONGRES SIGNAL DISTRICT 2	1200	No	No	No	CON	U.S. REPRESENTATIVE CONGRES SIGNAL DISTRICT 2	Yes	2		11/05/2024	Yes
+	CONGRES SIGNAL DISTRICT 4	1300	No	No	No	CON	U.S. REPRESENTATIVE CONGRES SIGNAL DISTRICT 4	Yes	2		11/05/2024	Yes

After reviewing each office in a District, print a summary list to proof. From the Office/Incumbent Management screen, click **[Office Data CSV]**.

The screenshot shows the 'Office/Incumbent Management' table. A red arrow points to the 'Office Data CSV' button at the top right of the table.

	Office	Office Sequence #	Is Vacant	Is Primary Partisan	Is Primary Non-Partisan	District Type	District Name	Is General Ballot	Term Length	Filing Fee	Next Election	Federal Only
+	CONGRES SIGNAL DISTRICT 2	1200	No	No	No	CON	U.S. REPRESENTATIVE CONGRES SIGNAL DISTRICT 2	Yes	2		11/05/2024	Yes
+	CONGRES SIGNAL DISTRICT 4	1300	No	No	No	CON	U.S. REPRESENTATIVE CONGRES SIGNAL DISTRICT 4	Yes	2		11/05/2024	Yes

A .csv file is exported to the Downloads folder. Double click on the file to open it in default spreadsheet app (usually Excel).



Confirm essential fields:

- Next Election (date)
- Federal Only (yes)
- Is Active (yes)

Office	Office Sequence #	Is Primary Partisan	Is Primary Non Partisan	Is General Ballot	Term Length	Next Election	Federal Only	Is Active
CONGRESSIONAL DISTRICT 2	1200	No	No	Yes	2	11/5/2024	Yes	Yes
CONGRESSIONAL DISTRICT 4	1300	No	No	Yes	2	11/5/2024	Yes	Yes

Repeat the process for each District Type.

Office/Incumbent Management

DISTRICT COURT JUDGE

Load Offices

Office Data CSV Incumbent Data CSV

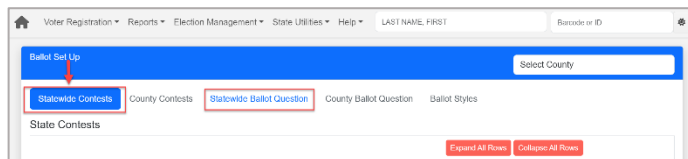
	Office	Office Sequence #	Is Vacant	Is Primary Partisan	Is Primary Non Partisan	District Type	District Name	Is General Ballot	Term Length	Filing Fee	Next Election	Federal Only
+	DISTRICT COURT JUDGE, DISTRICT 1, DEPT 1	13111	No	No	No	DCJ	DISTRICT COURT JUDGE, DISTRICT 1	No	6		06/09/2026	No
+	DISTRICT COURT JUDGE, DISTRICT 1, DEPT 2	13112	No	No	No	DCJ	DISTRICT COURT JUDGE, DISTRICT 1	No	6		06/09/2026	No

## Setting up a Ballot - State

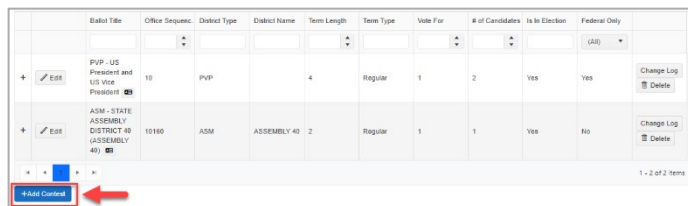
With districts confirmed, the election created, and offices reviewed, begin adding contests, candidates, and ballot initiatives to the ballot.

### Adding Statewide Contests

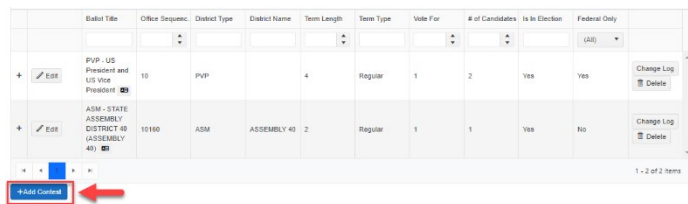
From the Navigation bar, select **Election Management > Ballot Set Up**. State functions are displayed in blue. **[Statewide Contests]** is the default.



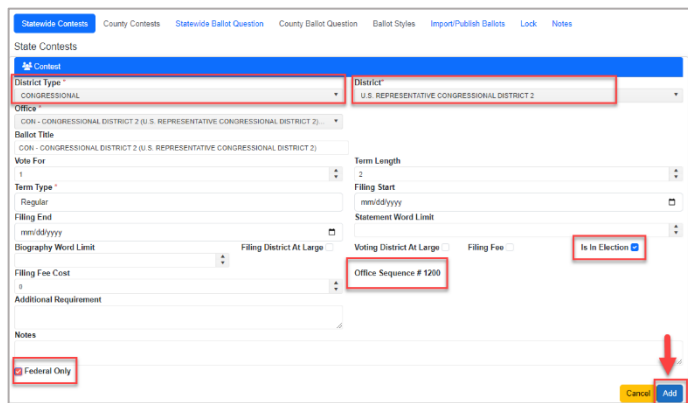
If the Contest is not in the list, click **[+Add Contest]**.



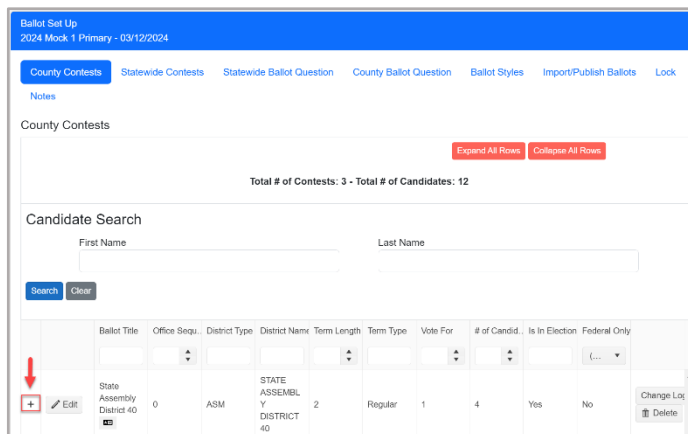
Click into the **District Type\*** field and select a District Type to begin adding contests.



Expand Contest Information screen. Select the **District Type**. Edit the Ballot Title. Important: Ensure **Is in Election** and **Federal Only** are both selected. Complete required\* fields and **[Add]**.



**If the Contest is listed**, click **[+]** to view contest details.



## Adding Candidates

To add a Candidate to a Contest, click **[+Add Candidate]**.

Ballot Title	Office Sequence	District Type	District Name	Term Length	Term Type	Vote For	# of Candidates	Is in Election	Federal Only
CON- CONGRESS) ONAL DISTRICT 2 (U.S. REPRESENTATIVE CONGRESS) ONAL DISTRICT 2)	1200	CON	U.S. REPRESENTATIVE CONGRESS) ONAL DISTRICT 2)	2	Regular	1	0	Yes	Yes

Candidates

Candidate #	Registrant ID	Ballot Name	Candidate Name	Filing Date	Filing Status	Party	Ballot Order	Write In
No records available.								

**+Add Candidate**

Enter required **Candidate** Information: **Ballot Order**, **Ballot Name\*** (candidate's preferred name as it should appear on the ballot), **Party\***, and **Candidate Type\***. **[+Expand]** Candidate Details.

**Ballot Order** **Ballot Name\*** **Party** **Candidate Type\***

Write In

**+Expand**

Search for the candidate in voter records entering the candidate's first and last name, then **[Pull Voter]**.

**First Name** **Last Name**

**Pull Voter**

If more than one name matches the search criteria, the system prompts "Multiple Voters Found." Click **[OK]** and **[Select]** the correct profile from the list.

**Multiple Voters Found**

Select the voter you would like to pull in from the duplicate voters grid.

**OK**

The system confirms **Voter pulled successfully**. Click **[OK]**.

**Voter Pulled**

Voter pulled successfully.

**OK**

Candidate Details are completed by the Voter's profile details.

**NOTE:** The Candidate's party on the **Candidate > Contest** screen is *entered manually and may not match the voter's registration*. To confirm the Candidate's party of record, look up the candidate's full voter profile using the Quick Search.

**[+Expand]** and complete **Campaign Details** and **Office Details** sections of the Candidate profile.

Choose the candidate status and **[Save]**

**NOTE: Candidate Status** must be **Approved** for the candidate to show on the ballot.

## Setting Candidate Order

After all candidates have been entered, set the order candidates will be listed on the ballot.

From **Election Management** select **Ballot Set Up** and open the list of candidates associated with a contest.

Click column headings to sort candidates by name or filing date. Enter numbers in the Ballot Order column.

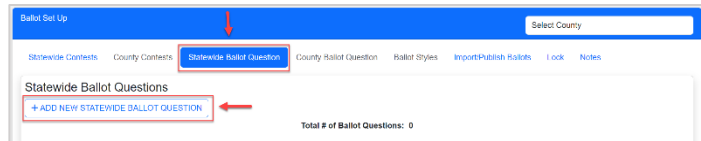
Candidate #	Registrar ID	Ballot Name	Candidate N.	Filing Date	Filing Status	Party	Ballot Order	Write In	Change Log
1		Candidate Name 1/Candidate		5/29/2024	Approved	DEM	1	No	Change Log Delete
2		Candidate Name 2/Candidate		5/29/2024	Approved	IAP	2	No	Change Log Delete
3		Candidate Name 3/Candidate		5/29/2024	Approved	NON	3	No	Change Log Delete

## Adding Statewide Ballot Questions

From the Navigation bar, select **Election Management > Ballot Set Up**.



Select Statewide Ballot Question on the menu bar, then click [+ADD NEW STATEWIDE BALLOT QUESTION].



Set the District Type to State and enter Date Received and Date Filed. Set the **Office Sequence No.\*** to follow the last **Office Sequence No.** set in **Office/Incumbent Management** for a similar office type. For example, if the **Office Sequence No.** set for the first City Council candidate was 16001, the **Office Sequence No.** for the next City Council member would be 16002.

The first Office Sequence No. for the first Statewide Ballot Question would be 19001.

**Note:** Office Sequence Number ranges are assigned by the State. See

Appendix: Office Sequence Numbers for a full listing.

Enter all other required fields\* and **[Save]**.

A screenshot of the 'Add New Statewide Ballot Question' form. The form is titled 'Add New Statewide Ballot Question' and has a close button in the top right corner. It contains several input fields and sections:

- District Type \***: A dropdown menu with 'STATEWIDE' selected.
- District Name**: A text input field.
- Ballot Question Type \***: A dropdown menu with 'Initiative to the Legislature' selected.
- Ballot Question Name \***: A rich text editor containing the text: 'Shall the Nevada Constitution be amended by adding a specific guarantee that equality of rights under the law shall not be denied or abridged by this State or any of its cities, counties, or other political subdivisions on account of race, color, creed, sex, sexual orientation, gender identity or expression, age, disability, ancestry, or national origin?'
- Ballot Question Title \***: A rich text editor containing the text: 'Constitutional Amendment to Guarantee Equal Rights Under the Law'.
- Office Sequence No. \***: A text input field with '19001' entered.
- Date Received \***: A date picker with '08/07/2024' selected.
- Federal Only**: A checkbox.
- Date Filed \***: A date picker with '07/26/2024' selected.
- EXPLANATORY STATEMENT**: A section with a sub-header 'Explanatory Statement' and a rich text editor.
- Short Description**: A text input field with a character count 'A 2'.
- Completed Text URL**: A text input field.
- Optional Text**: A text input field with a character count 'A 2'.
- For Text**, **Against Text**, and **AG Short Description**: Text input fields with character counts 'A 2', 'A 2', and 'AG Short Description' respectively.

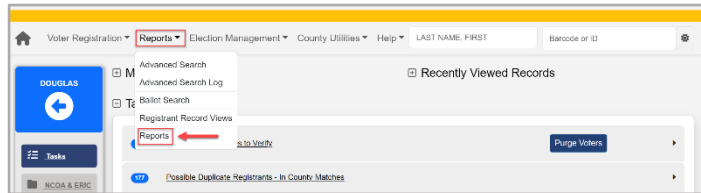
At the bottom right, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

## Running Candidate Proofing Reports

Proof candidate and contest data entry using two Election Management reports. On the Navigation Bar, select **Reports > Reports** and scroll down to **Election Management**.

- Candidates in Election
- Contests in Election

From the Navigation Bar, select **Reports > Reports**.



Scroll down to the **Election Management** heading and run reports:

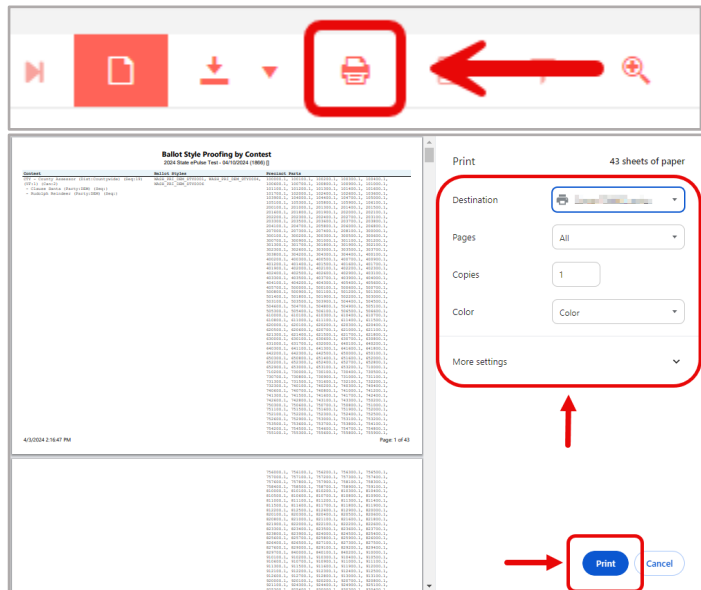
- Candidates in Election
- Contests in Election



To print a report, select the **Printer icon**.

The **Print** dialog box is displayed.

**TIP:** Note the number of **sheets of paper** (upper right corner of the Print dialogue box) and scroll through the report preview to confirm the report contains the information you need before clicking **[Print]**. Select Print settings and **[Print]**.



## Appendix: Office Sequence Numbers

### Federal Partisan Offices

Range	Office
0001 – 1000	President and Vice President of the United States
1001 – 2000	United States Senator
2001 – 3000	Representative in Congress

### Statewide Partisan Offices

Range	Office
3001 - 4000	Governor
4001 - 5000	Lieutenant Governor
5001 - 6000	Secretary of State
6001 - 7000	Treasurer
7001 - 8000	Controller
8001 - 9000	Attorney General
9001 - 10000	State Senators
10001 - 11000	Assembly

### Other State and District Offices

Range	Office
12001 - 13000	Statewide nonpartisan offices
13001 - 14000	District nonpartisan offices

### City/County/Township Offices

Range	Office
11001 - 12000	County and township partisan offices
14001 - 15000	County nonpartisan offices
15001 - 16000	Mayor
16001 - 17000	Council members according to ward in numerical order; if no wards, in alphabetical order
17001 - 18000	Municipal judges

### Ballot Questions

Range	Office
19001 - 20000	Statewide Questions
20001 - 21000	County Questions

## Setting Up an Election - County

This document covers processes associated with a county user adding contests, candidates and ballot questions to an election created by the State.

### Selecting the Election

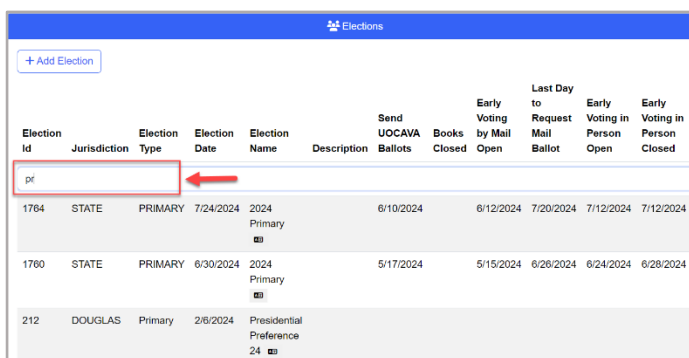
The state is responsible for creating state-wide, multi-jurisdictional, and state-level elections (primaries, generals, special, or recall elections), and adding all state-level or multi-jurisdictional contests and candidates. Once created, counties are responsible for adding local contests, candidates, and ballot questions.

The 2024 General Election has been created in TotalVote in PRD.

If the election listed below your login is not the 2024 General Election, click the red election bar. A list of past and scheduled elections is displayed.

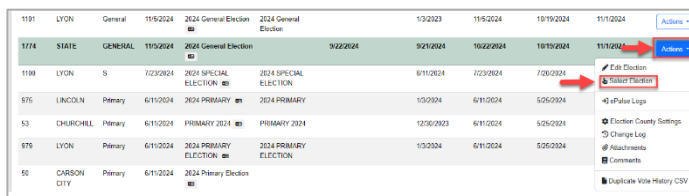


Begin entering the election ID number (1774), date, or name in the search bar. The list of options narrows to match the criteria entered.

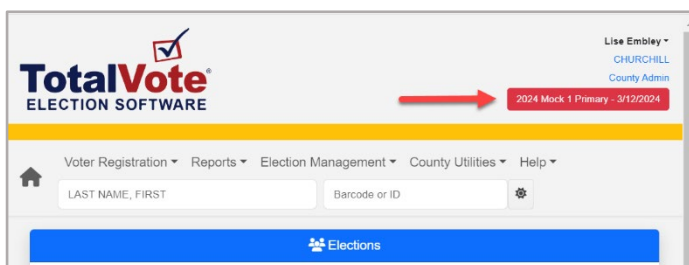


Open the **[Actions6]** dropdown and **Select Election**.

The election is highlighted in the list of elections and displayed on the election button under username and administrative role on the dashboard.



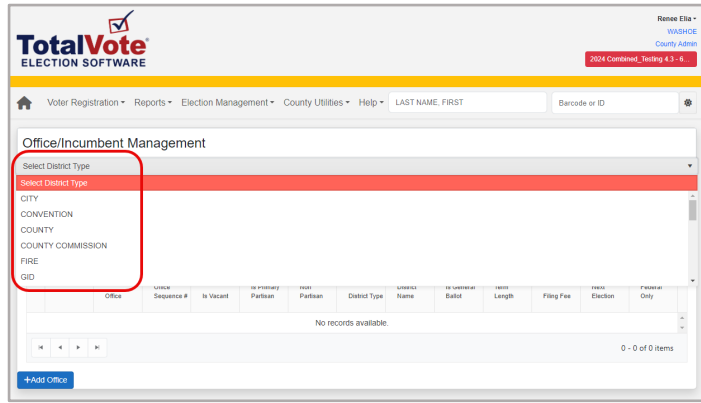
The election will remain active until it is time to begin preparations for the next election.



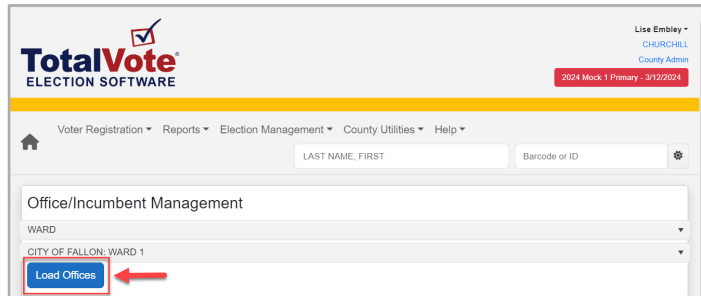
### Confirming Offices

Offices to be included in the election are pulled from Offices/Incumbents data in TotalVote. It is essential to ensure they are accurate before moving forward to set up the ballot.

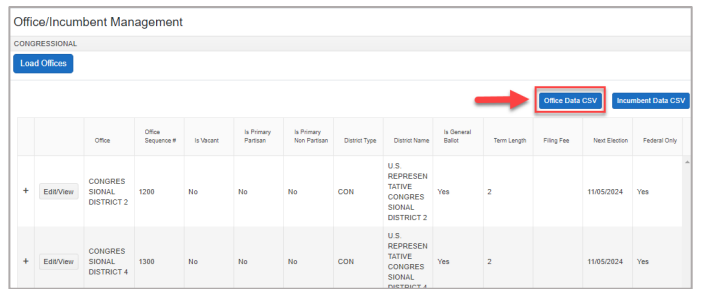
From the Navigation Bar, select Election Management > Office/Incumbent Management. Click the **Select District Type** menu bar and select the **District Type**.



With the District Type selected, click **[Load Offices]**.



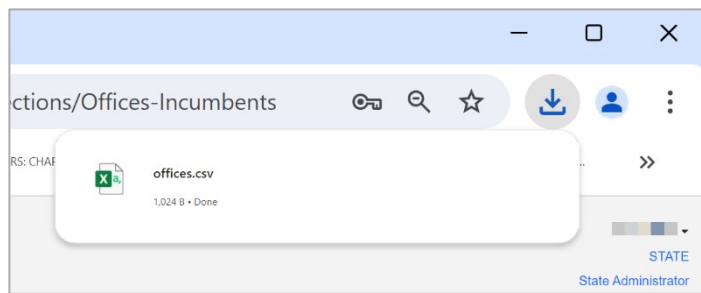
To print a summary list, click **[Office Data CSV]**.



Confirm essential fields:

- Next Election (date)
- Federal Only (where applicable)

Is Active (yes)



- Repeat the process to review the offices for each District Type.

	A	B	D	E	H	L	R	S	AC
1	Office	Office Sequence #	Is Primary Partisan	Is Primary Non Partisan	Is General Ballot	Term Length	Next Election	Federal Only	Is Active
2	CONGRESSIONAL DISTRICT 2	1200	No	No	Yes	2	11/5/2024	Yes	Yes
3	CONGRESSIONAL DISTRICT 4	1300	No	No	Yes	2	11/5/2024	Yes	Yes

To modify an office associated with the District, click **[Edit/View]**.

Office/Incumbent Management

DISTRICT COURT JUDGE

Load Offices

Office Data CSV Incumbent Data CSV

	Office	Office Sequence #	Is Vacant	Is Primary Partisan	Is Primary Non-Partisan	District Type	District Name	Is General Ballot	Term Length	Filing Fee	Next Election	Federal Only
+ Edit/View	DISTRICT COURT JUDGE DISTRICT 1, DEPT 1	13111	No	No	No	DCJ	DISTRICT COURT JUDGE DISTRICT 1	No	6		06/09/2026	No
+ Edit/View	DISTRICT COURT JUDGE DISTRICT 1, DEPT 2	13112	No	No	No	DCJ	DISTRICT COURT JUDGE DISTRICT 1	No	6		06/09/2026	No

Office/Incumbent Management

CONGRESSIONAL

Load Offices

Office Data CSV Incumbent Data CSV

	Office	Office Sequence #	Is Vacant	Is Primary Partisan	Is Primary Non-Partisan	District Type	District Name	Is General Ballot	Term Length	Filing Fee	Next Election	Federal Only
+ Edit/View	CONGRES SIONAL DISTRICT 2	1280	No	No	No	CON	U.S. REPRESENTATIVE CONGRES SIONAL DISTRICT 2	Yes	2		11/05/2024	Yes
+ Edit/View	CONGRES SIONAL DISTRICT 4	1300	No	No	No	CON	U.S. REPRESENTATIVE CONGRES SIONAL DISTRICT 4	Yes	2		11/05/2024	Yes

Enter/update all required\* fields and **[Add]/[Save]**.

- **Is Active** must be selected for the office to be added to a Ballot.
- If **Is Vacant** is selected, the **Office** will be included in **Ballot Setup** based on **Next Election** date.
- **Is Primary Partisan** and **Is Primary Non-Partisan** should not both be selected.
- **Is General** triggers inclusion on General Election ballots.
- **Term\*** triggers ballot inclusion in relevant future elections.
- **Office Sequence Number** specifies the office's placement on the ballot. See Appendix: Office Sequence Numbers.
- **Can File Again?** is for county use and does not impact reporting or ballot setup functions in TotalVote.
- **Next Election.** Enter date of next election (e.g., 11/05/2024)

Office

Base District Type: CITY

Base District: CITY OF RENO WARD 1

Filing District Type: Filing District

General Voting District Type: General Voting District

Primary Voting District Type: Primary Voting District

Office\*

Is Vacant **2** Is Primary Partisan **3** Is Primary Non-Partisan

Is General **4** Can File Again? **7** Is Active **1**

Term **5** Vote For **1**

Salary Type: Select

Filing Fee: 0

Minimum Age: 0

Handled By:

Statement Word Limit: 0

Additional Requirement:

Next Election **8** term/yyyy

Notes:

Federal Only

Cancel Add

## Setting up a Ballot - County

After reviewing and confirming or updating offices, the next step is to set up the ballot.

### Adding Contests

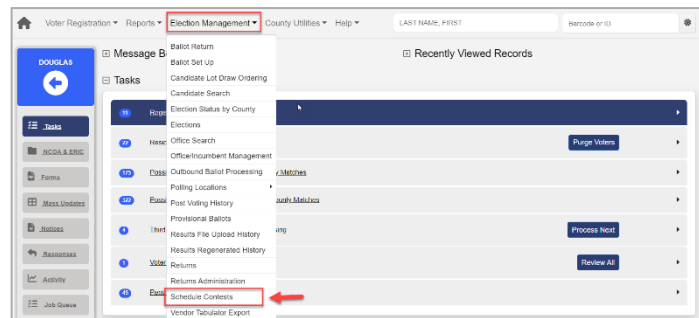
There are two ways to add county and local Contests in TotalVote:

- ▶ Using Election Management > Schedule Contests
- ▶ Adding Contests individually.

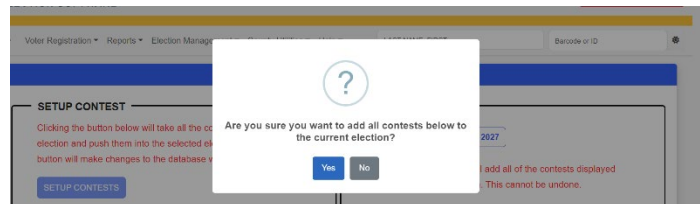
### Using Schedule Contests

**If Next Election dates have been set** for each office, use **Schedule Contest** to automatically create **Contests** for the current election.

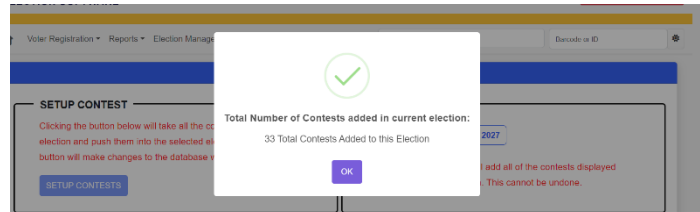
From the Navigation bar, select **Election Management > Schedule Contests**.



TotalVote warns that you are adding contests to the current election. Click **[Yes]** to have TotalVote generate **Contests** automatically.



TotalVote reports how many **Contests** were added to the election. **Note:** Do not click twice to **[SET UP CONTESTS]** or the Contests will be duplicated.



From the **Navigation Bar**, select **Election Management > Ballot Set Up** and review the Contests created automatically. **[Edit]** to change Contest details. **[Delete]** to remove a Contest.

	Ballot Title	Office Sequen	District Type	District Name	Term Length	Term Type	Vote For	# of Candidate	Is In Election	Federal Only	
	COMMISSIO NER DISTRICT 1	11030	CCM		4		1	0	Yes	No	Change Log Delete
	COMMISSIO NER DISTRICT 3	11031	CCM		4		1	0	Yes	No	Change Log Delete
	COMMISSIO NER DISTRICT 5	11038	CCM		4		1	0	Yes	No	Change Log Delete

National and State-wide Contests, Candidates, and Questions have been entered by the state and can be viewed but cannot be modified by county users.

## Adding Contests Individually

County and local contests can also be added individually, either to add to those generated automatically, or to set up the election manually.

From the Navigation bar, select **Election Management > Ballot Set Up**. [County Contests] is the default.

Ballot Set Up  
2024 Mock 1 Primary - 03/12/2024

County Contests   Statewide Contests   Statewide Ballot Question   County Ballot Question   Ballot Styles   Import/Publish Ballots   Lock

Notes

County Contests

Expand All Rows   Collapse All Rows

Total # of Contests: 3 - Total # of Candidates: 12

Candidate Search

First Name   Last Name

Search   Clear

	Ballot Title	Office Sequ.	District Type	District Name	Term Length	Term Type	Vote For	# of Candid.	Is In Election	Federal Only	
+   Edit	State Assembly District 40	0	ASM	STATE ASSEMBLY DISTRICT 40	2	Regular	1	4	Yes	No	Change Log   Delete

If the Contest is listed, click **[Edit]** to review or update contest details.

Ballot Set Up  
2024 General - 11/30/2024

County Contests   Statewide Contests   Statewide Ballot Question   County Ballot Question   Ballot Styles   Import/Publish Ballots   Lock

Notes

County Contests

Expand All Rows   Collapse All Rows

Total # of Contests: 34 - Total # of Candidates: 5

Candidate Search

First Name   Last Name

Search   Clear

	Ballot Title	Office Sequ.	District Type	District Name	Term Length	Term Type	Vote For	# of Candid.	Is In Election	Federal Only	
+   Edit	COMMISSIONER DISTRICT 1	11030	CCM		4		1	0	Yes	No	Change Log   Delete

If the Contest is not listed, click **[+Add Contest]**.

+   Edit	SCHOOL TRUST DIST G - AT LARGE	14131	SDL	SCHOOL TRUST DISTRICT G - AT LARGE	4			1	2	Yes	
+   Edit	SCHOOL TRUSTEE DISTRICT A	14132	SDT	SCHOOL TRUSTEE DISTRICT A	4			1	2	Yes	

1 2 3 4 5 ...

+Add Contest



Expand Contest Information screen.

- Select the District Type,\* District,\* and Office\*; edit the Ballot Title.
- **Is In Election** must be selected for the **Office** to be included in **Ballot Setup**.
- Note that **Office Sequence** pulls from the **Office/Incumbent Management** screen and determines placement on the ballot.

Complete required\* fields and **[Add]**.  
**Note:** If the **Office** is not available in the dropdown list, return to **Election Management > Offices and Incumbents** to add it.

## Adding Candidates

Before beginning the process of adding candidates to the Election, locate each candidate in TotalVote, **note their Registrant ID** and **confirm their Party of record** matches the Party on their Candidate Filing.

To add a Candidate to a Contest, click **[+Add Candidate]**.

		Candidate	Registrant	Ballot Nam	Candidate	Filing Date	Filing Statu	Party	Ballot Orde	Write In	
			600	Dutton, John	John Dutton	2/5/2024	Approved	REP	1	No	Change L Delete
			602	Cray, Mack	Mack Cray	2/5/2024	Approved	DEM	1	No	Change L Delete
			603	Trudeau, Denny	Denny Trudeau	2/5/2024	Approved	DEM	2	No	Change L Delete
			601	Long, Robert	Robert Long	2/5/2024	Approved	REP	2	No	Change L Delete

**+Add Candidate**

Enter required **Contest** Information:

- Ballot Order
- **Ballot Name\***  
Candidate's preferred name entered in Initial Caps, last name first, as it will appear on the ballot.  
**Do not use special characters.**
- Party\*
- Candidate Type\*

**[+Expand]** Candidate Details.

Search for the candidate in voter records by entering their **Voter ID** or **Name**, then **[Pull Voter]**.

The screenshot shows the 'Candidate Details' form. The 'Voter ID' field is highlighted with a red box. A red arrow points to the 'Pull Voter' button in the top right corner. Other fields include Title, Suffix, First Name, Middle Name, Last Name, Date of Birth, Residential Address, Address, Address Line 2, City, State (NV), Zip, County (DOUGLAS), and Municipality.

If the candidate's registration is available in any Nevada county other than Clark, searching for **Voter ID** will return the candidate's details. If more than one name matches name search criteria, the system prompts "Multiple Voters Found." Click **[OK]** and **[Select]** the correct profile from the list.

The screenshot shows the 'Candidate Search' screen with a modal dialog box that says "Multiple Voters Found" and "Select the voter you would like to pull in from the duplicate voters grid." There is an 'OK' button at the bottom of the dialog. The background shows the 'Candidate Search' form with a 'Search' button.

The system confirms **Voter pulled successfully**. Click **[OK]**. **NOTE:** The Candidate's party on the Candidate > Contest screen is entered manually and *may not match the voter's registration*. Confirm the Candidate's party of record by checking the candidate's voter profile.

The screenshot shows the 'Candidate Search' screen with a modal dialog box that says "Voter Pulled" and "Voter pulled successfully." There is an 'OK' button at the bottom of the dialog. The background shows the 'Candidate Search' form with a 'Search' button.

**Candidate Details** are completed by the Voter's profile details. **NOTE:** Correct the capitalization as necessary to ensure Candidate names are **Initial Caps** (NOT ALL CAPS).

The screenshot shows the 'Candidate Details' form. The 'First Name' field contains 'KATIE'. The 'Residential Address' section shows 'Address: DRESSAGE CT', 'City: RENO', 'State: NV', and 'Zip: 89521'. The 'County' is 'WASHOE'. There is a 'Pull Voter' button in the top right corner.

**[+Expand]** and complete **Campaign Details** and **Office Details** sections of the Candidate profile. Choose the candidate status and **[Save]**. **NOTE:** **Candidate Status** must be **Approved** for the candidate to show on the ballot.

The screenshot shows the 'Campaign Details' and 'Office Details' sections. The 'Campaign Status' dropdown is set to 'Approved'. The 'Save' button is highlighted with a red box. Other fields include Campaign Name, Campaign Mailing Address, Campaign Social Media, Filing Number, Filing Delivery Type, Campaign Filing Date, Filing Date, Check Number, Receipt Number, and buttons for Cancel, Save, and Print/Save.

## Setting Candidate Order

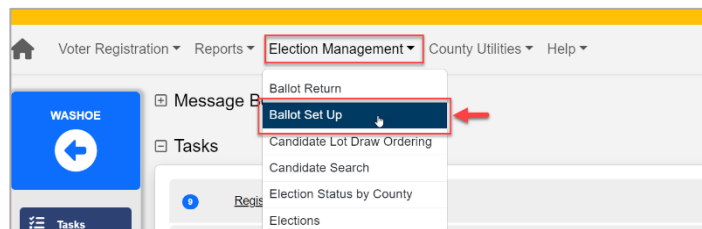
If ballot order has not been entered during candidate data entry, set the using the **Ballot Order** field on the **Ballot Set Up** screen.

From the Navigation bar, select **Election Management > Ballot Set Up** and open the list of candidates associated with a contest. Clicking column headings sorts candidates by name or filing date. Enter numbers in the Ballot Order column.

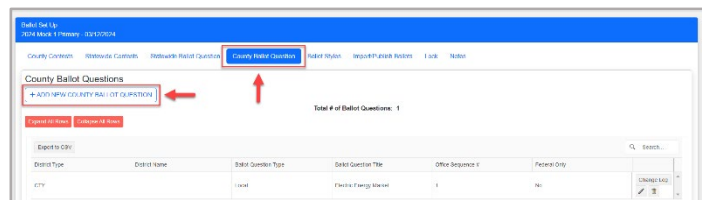
Candidate #	Registrar ID	Ballot Name	Candidate N.	Filing Date	Filing Status	Party	Ballot Order	Write In	Change Log	Delete
1		Candidate Name 1/Candidate		5/29/2024	Approved	DEM	1	No	Change Log	Delete
2		Candidate Name 2/Candidate		5/29/2024	Approved	IAP	2	No	Change Log	Delete
3		Candidate Name 3/Candidate		5/29/2024	Approved	NON	3	No	Change Log	Delete

## Adding County Ballot Questions

From the Navigation bar, select **Election Management > Ballot Set Up**.



Select **County Ballot Question** on the menu bar, then click **[+ADD NEW COUNTY BALLOT QUESTION]**.



1. Select the **District Type** and/or District.
  2. Set **Office Sequence No.\*** to the next number within the range 20001-21000. See Appendix: Office Sequence Numbers.
  3. Enter **Date Received:** when notice was filed.
  4. Enter **Date Filed:** when petition was deemed sufficient/approved.
  5. Select **Ballot Question Type\***.
  6. **Ballot Question Name\*** is the state's official Question number.
  7. **Ballot Question Title\*** is the state's official Brief Explanation.
- No other fields on this screen are mapped to ballot setup. Scroll to the bottom and **[Save]**.

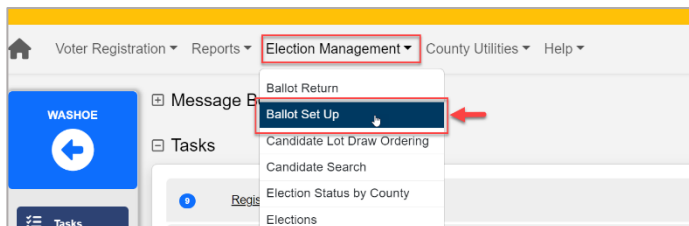
1. District Type: COUNTY  
 2. Office Sequence No.: 20008  
 3. Date Received: 06/24/2024  
 4. Date Filed: 07/13/2024  
 5. Ballot Question Type: Referendum Measure  
 6. Ballot Question Name: Petition 1  
 7. Ballot Question Title: Amending Douglas County Development Code Title 20, Section 20-622.1 and Title 18, Items Related to 1330 Ordinance

# Generating Ballot Styles

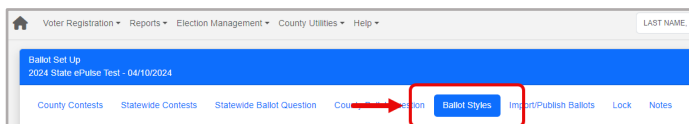
Generate Ballot Styles after **Offices, Contests, and Candidates** are set, and **County Ballot Questions** entered.

**NOTE:** TotalVote will lock the election automatically once Ballots are issued.

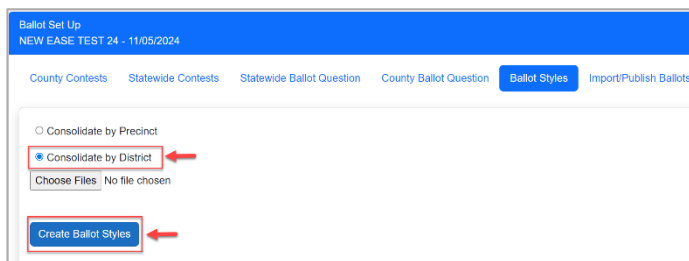
From the Navigation Bar, select Election Management > Ballot Set Up.



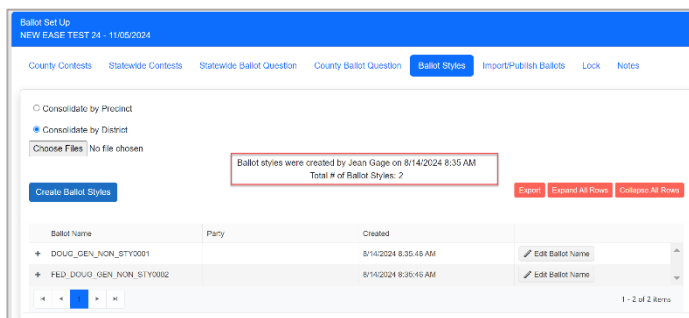
From the Ballot Set Up menu, select Ballot Styles.



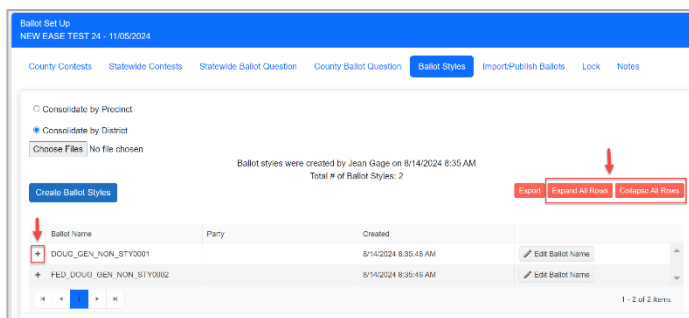
Choose Consolidate by District, then [Create Ballot Styles].



**Ballot Styles** are created; the list heading displays the total number of styles and the date and time they were created.



Click **[+]** to display details for an individual Ballot Style. Use **[Expand All Rows]** and **[Collapse All Rows]** to adjust the level of detail displayed for all ballot styles.



Verify Ballot Styles include all County Contests and County Ballot Questions.

The screenshot shows the 'Ballot Set Up' interface for the '2024 State ePoll Test - 04/10/2024'. At the top, there are navigation tabs: 'County Contests', 'Statewide Ballots', 'County Ballot Questions', 'Ballot Styles', 'Import/Publish Ballots', 'Lock', and 'Notes'. Red arrows point from 'County Contests' to 'County Ballot Questions' and from 'County Ballot Questions' to 'Ballot Styles'. Below the tabs, there is a list of ballot styles with columns for name, party, and date. Two styles are highlighted with red boxes: 'WASH\_PRL\_REP\_STY0005' and 'WASH\_PRL\_REP\_STY0007'. Below this list, there is a section for 'Office' (STATE ASSEMBLY, DISTRICT 32) and a 'Candidate Name' field. At the bottom, there is a table with columns: County, District Name, Precinct, Precinct Split, Registered Voters, Mail Ballot Voters, and No Mail Ballot (NMB) Vot.

County	District Name	Precinct	Precinct Split	Registered Voters	Mail Ballot Voters	No Mail Ballot (NMB) Vot.
WASHOE		RENO-VERDI 7541	754100.1	970	848	0
WASHOE		RENO-VERDI 9560	956000.1	0	0	0
WASHOE		GER-WADS 7412	741200.1	19	17	0
WASHOE		RENO-VERDI 7511	751100.1	0	0	0

*Optional:* To make ballot proofing easier, consider changing system-generated ballot style names to recognizable names. Click [Edit Ballot Name].

The screenshot shows the 'Ballot Set Up' interface for the 'DOUG\_WAT\_STY0005' ballot style. At the top, there is a date and time '4/22/2024 8:25:17 AM' and an 'Edit Ballot Name' button. Below this, there is a section for 'Office' (EAST FORK FIRE PROTECTION D1) and a 'Candidate Name' field. At the bottom, there is a table with columns: County, District Name, Precinct, Precinct Split, Registered Voters, Mail Ballot Voters, and No Mail Ballot (NMB). The 'Precinct' column is highlighted with a red box.

County	District Name	Precinct	Precinct Split	Registered Voters	Mail Ballot Voters	No Mail Ballot (NMB)
DOUGLAS		25-Pleasantview	25.1 Gen Valley (Pleasantview).1	2	2	0
DOUGLAS		25-Pleasantview	25.2 Pleasantview/Ranchos GID.2	1574	1470	0
DOUGLAS		25-Pleasantview	25.3 Gen Valley (Pleasantview).3	88	81	0
DOUGLAS		25-Pleasantview	25.4 Pleasantview/Ranchos GID.4	183	173	0

Enter the New Ballot Name and [Save]. **NOTE:** Re-generating ballots will overwrite edited ballot names with system default names; confirm basic ballot style information before renaming.

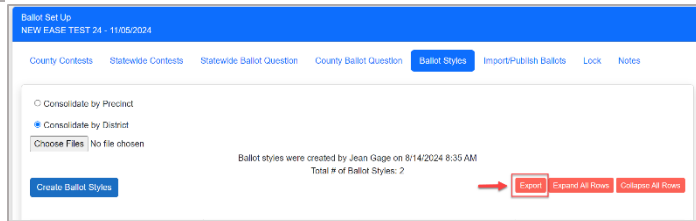
The screenshot shows a dialog box for editing the ballot name. The 'Current Name' is 'DOUG\_WAT\_STY0005'. The 'New Ballot Name' field contains '25\_Pleasant\_View'. There are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

To expedite renaming, highlight the precinct name, then use [ctrl]+[c] to copy and [ctrl]+[v] to paste the name into the Ballot name field.

The screenshot shows the 'Ballot Set Up' interface for the 'DOUGLAS' ballot style. At the top, there is a section for 'Office' (EAST FORK FIRE PROTECTION D1) and a 'Candidate Name' field. At the bottom, there is a table with columns: County, District Name, Precinct, Precinct Split, Registered Voters, Mail Ballot Voters, and No Mail Ballot (NMB). The 'Precinct' column is highlighted with a red box.

County	District Name	Precinct	Precinct Split	Registered Voters	Mail Ballot Voters	No Mail Ballot (NMB)
DOUGLAS		09-Ranchos I (GRID).1	09.2 Ranchos (GRID).1	1431	1327	0

Click **[Export]** to create a spreadsheet listing of all ballot styles and associated precincts.



With ballot styles renamed, you can easily confirm that Precincts align with the correct ballot styles.

Ballot Name	Ballot Title	Precinct Name	Office Name	Office Seq	Candidate	Ballot Order
08-Ranchos_I	GID - EAST	08-Ranchos I	EAST FORK FIRE PROTECTION I	0	Candidate, Three	
08-Ranchos_I	GID - EAST	08-Ranchos I	EAST FORK FIRE PROTECTION I	0	Candidate, One	
08-Ranchos_I	GID - EAST	08-Ranchos I	EAST FORK FIRE PROTECTION I	0	Candidate, Two	
09-Ranchos_II	GID - EAST	09-Ranchos II	EAST FORK FIRE PROTECTION I	0	Candidate, Three	
09-Ranchos_II	GID - EAST	09-Ranchos II	EAST FORK FIRE PROTECTION I	0	Candidate, One	
09-Ranchos_II	GID - EAST	09-Ranchos II	EAST FORK FIRE PROTECTION I	0	Candidate, Two	
19-Ranchos_IV	GID - EAST	19-Ranchos IV	EAST FORK FIRE PROTECTION I	0	Candidate, Three	
19-Ranchos_IV	GID - EAST	19-Ranchos IV	EAST FORK FIRE PROTECTION I	0	Candidate, One	
19-Ranchos_IV	GID - EAST	19-Ranchos IV	EAST FORK FIRE PROTECTION I	0	Candidate, Two	

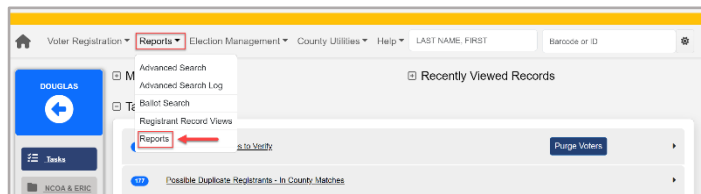
## Running Ballot Pre-Proofing Reports

Before generating the Election Package for the Tabulation Vendor, pre-proof Ballot Styles:

- Cross reference County-level data to validate data entry.
- Review State-level data to ensure they are present at the County-level.

In addition to the spreadsheet export of ballot styles, TotalVote offers a variety of ballot proofing reports.

From the Navigation Bar, select **Reports > Reports**.

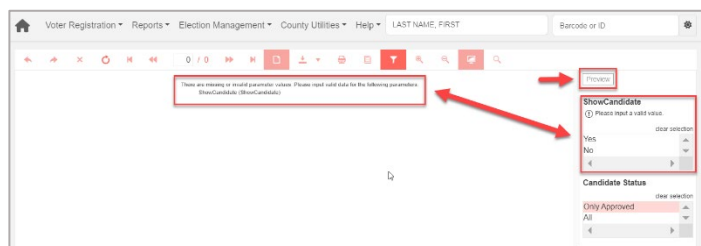


Most ballot details can be proofed using two reports in combination with the ballot styles export:

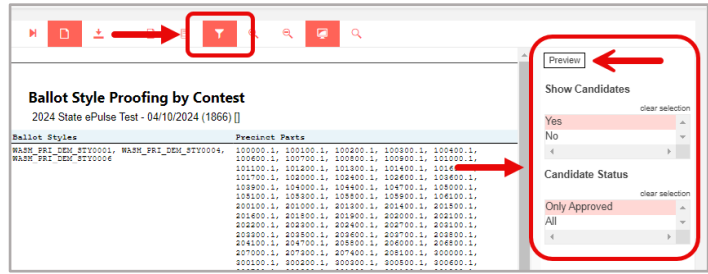
- Ballot Proofing By Precinct Part
- Ballot Styles List



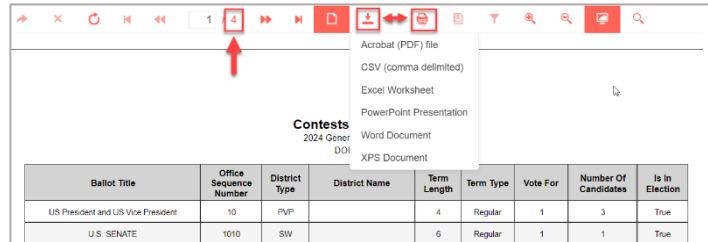
If the report requires specific filter selections, TotalVote displays “There are missing or invalid parameter values. Please input valid data for the following parameters.” Select the missing filter option and **[Preview]**.



Some reports can be filtered using options on the right rail. Select any filter options and click **[Preview]**.



**Download** or **print** reports using options on the menu bar.



## Comparing Reports and Making Corrections

Compare ballot styles against **Ballot Proofing** reports and election information in TotalVote. Resolve errors or inconsistencies.

Make any corrections needed to the Ballot Setup in TotalVote and repeat the steps in Generating Ballot Styles.

Next Step: Generating the Election Package

### Appendix: Office Sequence Numbers

#### Federal Partisan Offices

Range	Office
0001 – 1000	President and Vice President of the United States
1001 – 2000	United States Senator
2001 – 3000	Representative in Congress

#### Statewide Partisan Offices

Range	Office
3001 - 4000	Governor
4001 – 5000	Lieutenant Governor
5001 - 6000	Secretary of State
6001 - 7000	Treasurer
7001 – 8000	Controller
8001 – 9000	Attorney General
9001 – 10000	State Senators
10001 – 11000	Assembly

#### Other State and District Offices

Range	Office
12001 – 13000	Statewide nonpartisan offices
13001 – 14000	District nonpartisan offices



### City/County/Township Offices

Range	Office
11001 – 12000	County and township partisan offices
14001 – 15000	County nonpartisan offices
15001 – 16000	Mayor
16001 – 17000	Council members according to ward in numerical order; if no wards, in alphabetical order
17001 – 18000	Municipal judges
18001 – 19000	Township nonpartisan offices

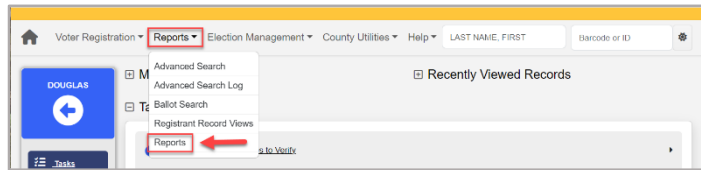
### Ballot Questions

Range	Office
19001 – 20000	Statewide Questions
20001 – 21000	County Questions

# Verifying Districts and Precinct Assignments

This document covers processes associated with verifying Districts and Precinct Assignments in TotalVote.

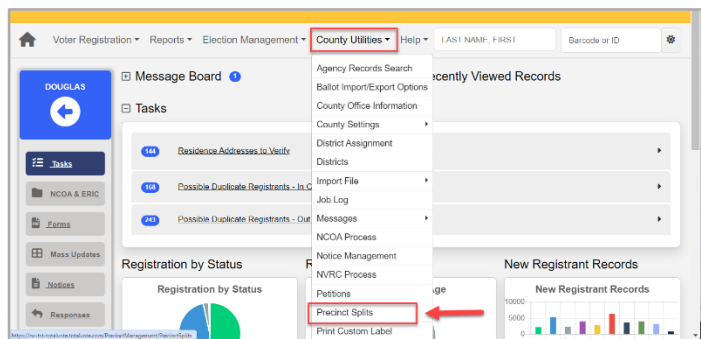
From the Navigation bar, select **Reports > Reports**.



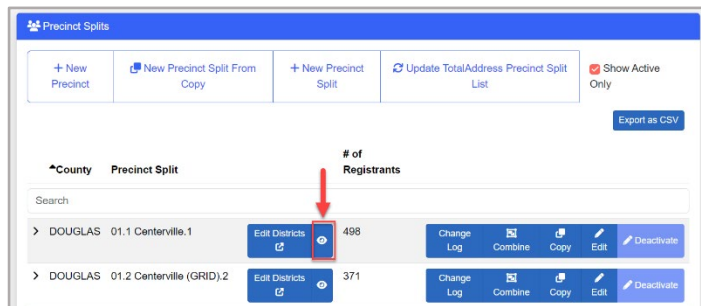
Run the Districts with Precinct Assignments and Precincts with District Assignment Reports. Review and verify accuracy.



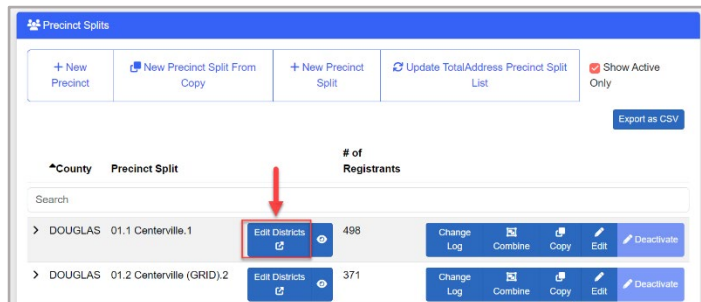
To modify a precinct, from the Navigation bar choose **County Utilities > Precinct Splits**.



To view the **Precinct Split** with all the associated **Districts**, click the view icon.



To edit the **Districts** associated with a **Precinct Split**, click **[Edit Districts]**.



Make changes by moving Districts from **Available Districts** list to **Linked Districts** and **[Save]**.

DOUGLAS  
01-Centerville (01 ) (PRE04000100)

« Precinct Split Name: 01.1 Centerville.1 (01.1) »

Available Districts:  Include Inactive Save Cancel

- ▶ GID
- ▶ PRECINCT
- ▶ PRESIDENT AND VICE PRES
- ▶ SCHOOL DISTRICT TRUSTEE
- ▶ TOWN BOARD
- ▶ TOWNSHIP

Linked Districts: + Create

- ▼ ASSEMBLY
  - ASSEMBLY 39
- ▼ BOARD OF REGENTS
  - REGENT DISTRICT 09
- ▼ CONGRESSIONAL
  - CONGRESSIONAL DISTRICT 2
- ▼ GID
  - East Fork Fire Protection D2
  - East Fork Swim Pool District

## Managing Offices

This document covers processes associated with managing Offices in preparation for ballot setup in TotalVote.

From the Navigation Bar, select Election Management > Office/Incumbent Management. Click the **Select District Type** menu bar and select the **District Type**.

With the District Type selected, click **[Load Offices]**. Click **[Office Data CSV]** to export a listing of all offices. Review to confirm all Offices are listed.

	Office	Office Sequence #	Is Vacant	Is Primary Partisan	Is Primary Non-Partisan	District Type	District Name	Is General Ballot	Term Length	Filing Fee	Next Election	Federal Only
+ Edit/View	ASSESSOR	11240	No	No	No	CTY		No	4		06/09/2026	No
+ Edit/View	CLERK-TREASURER	11415	No	No	No	CTY		No	4		06/09/2026	No
+ Edit/View	DISTRICT ATTORNEY	11515	No	No	No	CTY		No	4		06/09/2026	No
+ Edit/View	PUBLIC ADMINISTRATOR	11715	No	No	No	CTY		No	4		06/09/2026	No

If an Office is not listed, click **[+Add Office]**.

Enter all required\* fields and **[Add]**.

- **Is Active** must be selected for the office to be added to a Ballot.
- If **Is Vacant** is selected, the **Office** will be included in **Ballot Setup** based on **Next Election** date.
- **Is Primary Partisan** and **Is Primary Non-Partisan** should not both be selected.
- **Is General** triggers inclusion on General Election ballots.
- **Term\*** triggers ballot inclusion in relevant future elections.

- **Office Sequence Number** specifies the office's placement on the ballot. See
- Appendix: Office Sequence Numbers.
- **Can File Again?** is for county use and does not impact reporting or ballot setup functions in TotalVote.

After all offices are set up, view a summary of Contests. Click **Reports > Reports** and select **Contests in Election**.

Verify Ballot Title, Office Sequence number, Term Length, etc.

Contests in Election								
2024 General - 11/05/2024								
ELKO								
Ballot Title	Office Sequence Number	District Type	District Name	Term Length	Term Type	Vote For	Number Of Candidates	Is In Election
US President and US Vice President	10	PVP		4	Regular	1	1	True
U.S. SENATE	1010	SW		6	Regular	1	1	True
CONGRESSIONAL DIST 2	1200	CON	U.S. REPRESENTATIVE CONGRESSIONAL DISTRICT 2	2		1	1	True
ASM - STATE ASSEMBLY DISTRICT 32 (ASSEMBLY 32)	10080	ASM	ASSEMBLY 32	2	Regular	1	2	True
JUSTICE OF THE SUPREME COURT - SEAT C	12030	SW		6		1	1	True
JUSTICE OF THE SUPREME COURT - SEAT F	12060	SW		6		1	1	True
JUSTICE OF THE SUPREME COURT - SEAT G	12070	SW		6		1	1	True
STR - BOARD OF REGENTS, DISTRICT 8 (REGENT DISTRICT 08)	13950	STR	REGENT DISTRICT 08	2	Regular	1	0	True

## Appendix: Office Sequence Numbers

### Federal Partisan Offices

Range	Office
0001 – 1000	President and Vice President of the United States
1001 – 2000	United States Senator
2001 – 3000	Representative in Congress

### Statewide Partisan Offices

Range	Office
3001 - 4000	Governor
4001 – 5000	Lieutenant Governor
5001 - 6000	Secretary of State
6001 - 7000	Treasurer
7001 – 8000	Controller
8001 – 9000	Attorney General
9001 – 10000	State Senators
10001 – 11000	Assembly

### Other State and District Offices

Range	Office
12001 – 13000	Statewide nonpartisan offices

13001 – 14000

District nonpartisan offices

### City/County/Township Offices

Range	Office
11001 – 12000	County and township partisan offices
14001 – 15000	County nonpartisan offices
15001 – 16000	Mayor
16001 – 17000	Council members according to ward in numerical order; if no wards, in alphabetical order
17001 – 18000	Municipal judges

### Ballot Questions

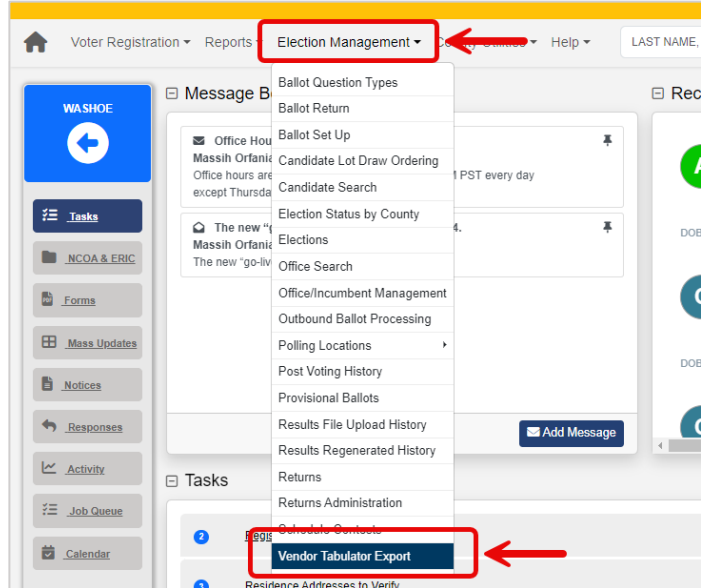
Range	Office
19001 – 20000	Statewide Questions
20001 – 21000	County Questions

## Generating the Election Package

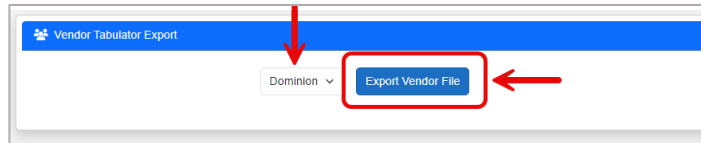
After creating and pre-proofing Ballot Styles, prepare the Election Package for the Tabulation Vendor. This guide covers processes for creating, preparing, and sending the Election Package.

### Exporting the Vendor Tabulation File

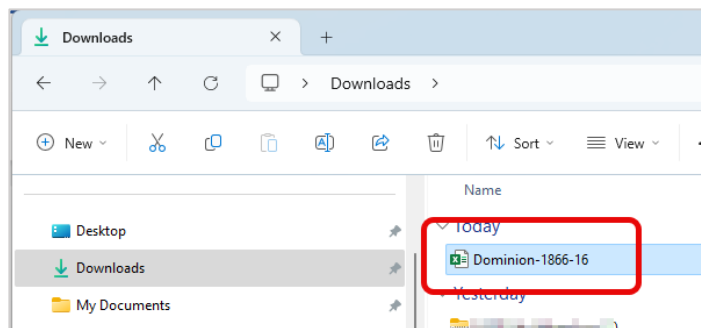
From the Navigation Bar, select Election Management > Vendor Tabulator Export.



The County's Tabulation Vendor (**Dominion** or **ES&S**) is displayed. Click **Export Vendor File**.



A CSV file is exported to the **Downloads** folder. Double click on the file link in Downloads to open and review the .csv file in Excel.





Proof the Tabulation File against Ballot Styles reports. Make any user error corrections.

For corrections to the Tabulation File that are not County error, **contact VREMS support** for assistance before preparing the final Election Package.

ID	Election	Co	Name	Parent ID	Eligible	Abb	Desc	Key-in	External	External	External	EC-1	TAB	LP-1
111	1758	4	28.6 Orchard Rd (Town)	105	0			9306	04009306					
112	1758	4	28.7 Orchard Rd (Town)	105	0			9407	04009407					
113	1758	4	29-Autumn Hills		0			29	PRE04002900					English
114	1758	4	29.1 Autumn Hills.1	113	0			6201	04006201					
115	1758	4	29.2 Autumn Hills (KGID)	113	0			9502	04009502					
116	1758	4	30-East Fork		0			30	PRE04003000					English
117	1758	4	30.1 East Fork.1	116	0			6301	04006301					
118	1758	4	30.2 East Fork (GRGID)	116	0			9602	04009602					
119	1758	4	30.3 East Fork.3	116	0			9703	04009703					
120	1758	4	31-Chichester		0			31	PRE04003100					English
121	1758	4	31.1 Chichester/Town	120	0			6401	04006401					
122	1758	4	31.2 Chichester.2	120	0			9802	04009802					
123	1758	4	32-East Valley		0			32	PRE04003200					English
124	1758	4	32.1 East Valley.1	123	0			6501	04006501					
125	1758	4	32.2 East Valley.2	123	0			9902	04009902					
126	1758	4	33-Hot Springs		0			33	PRE04003300					English
127	1758	4	33.1 Hot Springs.1	126	0			6601	04006601					
128	1758	4	34-Sunridge		0			34	PRE04003400					English
129	1758	4	34.1 Sunridge/HKID.1	128	0			6701	04006701					
130	1758	4	34.2 Sunridge.2	128	0			10002	04010002					
131	1758	4	35-Glenbrook		0			35	PRE04003500					English

## Preparing the Election Package

Dominion	ES&S
Collect the Tabulation File. Complete the Election Definition Form Complete the <b>Roster &amp; Schedule of Equipment</b> to be used during the election: <ul style="list-style-type: none"> <li>• Number of voting devices</li> <li>• Location of Vote Centers where the devices are assigned</li> <li>• Timeframe for when devices will be used.</li> </ul>	Collect the Tabulation File Complete the ES&S Pre-Election Questionnaire

## Sending Election Package to Tabulation Vendor

Dominion Counties	ES&S Counties
c Upload the Election Package to Dominion.	c Upload the Election Package to ES&S.

Next Step: Ballot Proofing

## Ballot Proofing - Dominion

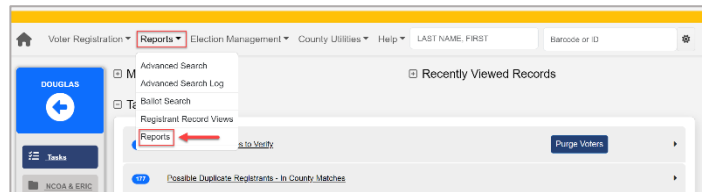
Dominion prepares the **Election Project** from the County's **Election Package**, creating reports the County will reference for Ballot Proofing. Reports include Ballot Types, Choices, Contests, Districts, Precincts, Activation Codes, etc.

Note: Dominion notifies the County when reports are available for retrieval/download.

### Running Ballot Proofing Reports

Run **Ballot Proofing** reports in TotalVote to proof against the Election Project.

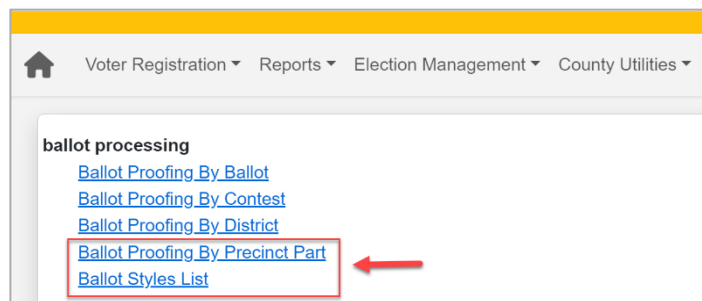
From the Navigation bar, select **Reports > Reports**.



TotalVote offers a variety of reports that may be useful. Start with these:

- Ballot Proofing By Precinct Part
- Ballot Styles List

The Ballot Styles spreadsheet exported during ballot setup may also be helpful.



### Comparing Reports and Making Corrections

Compare Dominion's **Election Project** reports to the following:

- State's Certified Candidate List (*from Aurora*)
- County's original **Election Package**
- TotalVote reports

Look for errors or inconsistencies and troubleshoot the root causes.

If the error is data entry in TotalVote	If the error is in Dominion project reports
<ul style="list-style-type: none"> <li>• Make updates in TotalVote.</li> <li>• Make updates to the <b>County's Elections Package</b>, as needed.</li> <li>• <b>Re-generate ballot styles</b> so vendor tabulation files are updated.</li> </ul>	<ul style="list-style-type: none"> <li>• Identify issues and updates needed in the <b>Election Project</b></li> <li>• Work with Dominion to resolve them.</li> </ul>

If changes are made in TotalVote, regenerate ballot styles or the changes will not appear in the tabulation files to the vendor.

**IMPORTANT:** To move forward with an election, there must be **no errors or inconsistencies** between the **Election Package**, data in TotalVote, and **Election Project** reports.

## Updating and Resubmitting the Election Package

If updates were made in TotalVote, **re-generate and validate Ballot Styles** until all errors are resolved.

- Re-export and validate the Vendor Tabulation File in TotalVote.
- Re-assemble the County's corrected **Election Package**:
  - Updated Vendor **Tabulation File**
  - Updated County **Election Package** forms (if updates were made).
  - List issues and updates needed to the **Election Project** by Dominion
- Re-upload the updated **Election Package** to Dominion. Some changes may be communicated to Dominion via email when files are not being exchanged.
- Notify Dominion that updates are needed.
- Repeat Ballot Proofing processes until the Election Project reports are clean/approved.

## Creating and Proofing Ballot Images

After the County approves Dominion's **Election Project** reports, Dominion creates ballot images (PDFs) that will be used for:

- Mail Ballots
- Email ballots
- Electronic Ballots (for ICX Primes)

Dominion then sends ballot images to the County for proofing. Compare precinct numbers, ballot styles, offices and candidates on the PDFs. Additional items the County should proof include, but are not limited to:

- Ballot header, content, and footer
- Contest and Choice order
- Vote for #
- Party designation

## Submitting Project Package Authorization

Once Dominion's **Election Project** reports are clean/approved, Counties send the authorization signoff for each Dominion Election Project report/component to Dominion.

## Preparing the Final Election Project Package

After the County approves ballot images, Dominion prepares and sends the final **Election Project Package** to the County. The package includes, but is not limited to:

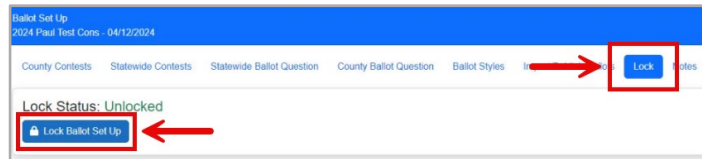
- Ballot images
- Reports
- Audio files for tabulation machines
- Data file used for programming the USB files for the ICX machines
- EASE files to be submitted to the state for upload to the portal

## Locking the Ballot Setup

After receiving the final Election Project Package from Dominion, lock the Ballot Setup in **TotalVote** to prohibit edits to contests, candidates, ballot questions, and ballot styles.

**NOTE:** TotalVote will lock the election automatically once Ballots are issued.

From the Navigation Bar, select  
Election Management >  
Ballot Set Up > Lock >  
[Lock Ballot Set Up]



## Providing Ballot Images and Test Decks to the Print Vendor

After receiving Dominion's final **Election Project Package** and locking the **Ballot Setup**, send the following to the Print Vendor:

- Final approved ballot images (PDFs)
- Test Decks images

The print vendor then generates Mail Ballot proofs and printed Test Decks and sends them to the County for proofing. Counties with ballot printers may print Test Decks in-house.

Proof Mail Ballots and printed Test Decks. Work with the Print Vendor until errors are resolved.

## Submitting Print Vendor Authorization

Once the **Mail Ballot** and **Test Deck** proofs are approved, send authorization signoff to the Print Vendor. Ensure ballot proofs are final and approved **on or before date set by print vendors**.

Next Step: Outbound Ballot Processing

## Ballot Proofing -ES&S

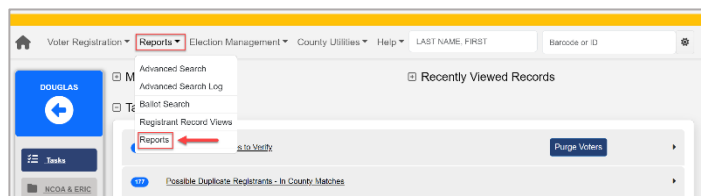
After ES&S receives the **Election Package**, the County begins entering election information (offices, contests, etc.) into the ES&S tabulation software portal. After the County enters information into the ES&S Portal, ES&S produces ballot images (PDFs) and an election data file (the “**Election Project Package**”) that will be used to program tabulation machines and voting equipment.

ES&S sends the **Election Project Package** to the county via the secure file sharing portal and notifies the county that reports are available for retrieval/download.

### Running Ballot Proofing Reports

Run **Ballot Proofing** reports in TotalVote to proof against the Election Project reports.

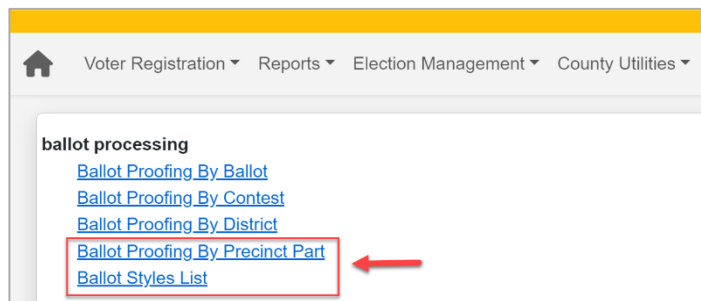
From the Navigation bar, select **Reports > Reports**.



TotalVote offers a variety of reports that may be useful. Start with these:

- Ballot Proofing By Precinct Part
- Ballot Styles List

The Ballot Styles spreadsheet exported during ballot setup may also be helpful.



### Comparing and Making Corrections

Compare the ES&S **Election Project Package** to the following:

- State’s Certified Candidate List (*from Aurora*)
- County’s original **Election Package**
- TotalVote ballot proofing reports (*above*)

Look for errors or inconsistencies and troubleshoot root causes.

If the error is data entry in TotalVote	If the error is with ES&S project reports
<ul style="list-style-type: none"> <li>• Make updates in TotalVote.</li> <li>• Make updates to the County’s Elections Package, as needed.</li> <li>• Re-generate ballot styles so vendor tabulation files are updated.</li> </ul>	<ul style="list-style-type: none"> <li>• Identify issues and updates needed in the Election Project</li> <li>• Work with ES&amp;S to resolve them.</li> </ul>

**IMPORTANT:** To move forward with election setup, there must be **no errors or inconsistencies** between the **Election Package**, data in TotalVote, and **Election Project**

reports.

### Proofing Election Data On Tabulators

At this point, the County may begin programming USBs with the election data file and testing the election data on tabulators to ensure ballots display properly on tabulation machines and voting equipment.

## Proofing Ballot Images

Ballot images (PDFs) will be used for:

- Mail ballots
- Email ballots
- Electronic ballots (for ExpressVote Ballot Marking Devices)

Compare precinct numbers, ballot styles, offices, contests, and candidates on the PDFs. Additional items to proof include, but are not limited to:

- Ballot header, content, and footer
- Contest and Choice order
- Vote for #
- Party designation

Ensure ballots print properly from ballot printers used for printing mail ballots in-house.

## Updating and Resubmitting the Election Package

If updates were made in TotalVote, **re-generate and validate Ballot Styles** until all errors are resolved.

- Re-export and validate the Vendor Tabulation File in TotalVote.
- Re-assemble the County's **Election Package** w/corrections:
  - Updated Vendor Tabulation File
  - Updated County Election Package forms, only if updates were made.
  - List issues and updates needed to the Election Project Package by ES&S
- Re-upload the updated Election Package to ES&S. Some counties may communicate changes to ES&S via email when files are not being exchanged.
- Notify ES&S that updates are needed.

**IMPORTANT:** Repeat Ballot Proofing processes until the Election Project reports are clean/approved.

## Submitting Project Package Authorization

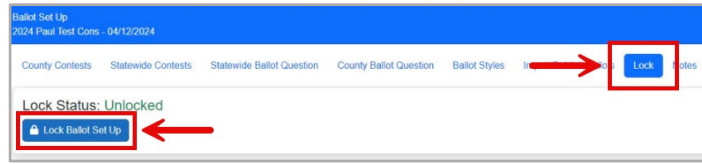
Once the ES&S Election **Project Package** (ballot images and data file) is approved, Counties submit authorization signoff to ES&S.

## Locking the Ballot Setup

After approving the Election Project Package, lock the Ballot Setup in **TotalVote** to prohibit edits to contests, candidates, ballot questions, and ballot styles.

**NOTE:** TotalVote will lock the election automatically once Ballots are issued.

From the Navigation Bar, select  
Elections Management >  
Ballot Set Up > Lock >  
[Lock Ballot Setup].



### Providing Ballot Images and Test Decks to the Print Vendor

After approving the ES&S Election **Project Package** and locking the **Ballot Setup**, send the following to the Print Vendor:

- Final approved ballot images (PDFs)
- Test Decks images

The Print Vendor then generates Mail Ballot proofs and printed Test Decks and sends them to the County for proofing. Counties with ballot printers may print Test Decks in-house.

Proof Mail Ballots and printed Test Decks. Work with the Print Vendor until errors are resolved.

### Submitting Print Vendor Authorization/Approval

Once the **Mail Ballot** and **Test Deck** proofs are approved, send authorization signoff to the Print Vendor. Ensure ballot proofs are final and approved **on or before print vendor deadline**.

**Next Step:** Outbound Ballot Processing



## Outbound Ballot Processing

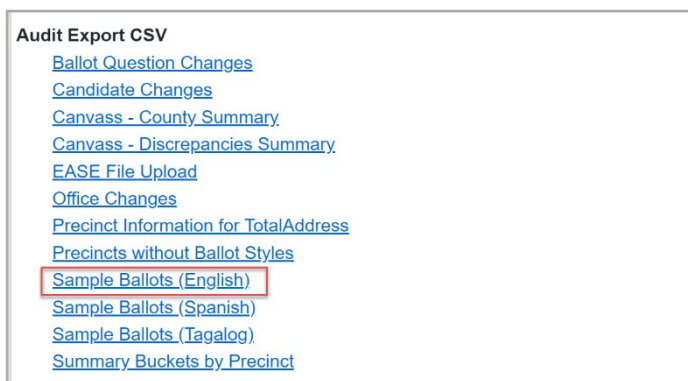
This document covers the steps to prepare files for printing and mailing sample and official ballots in-house or through a print vendor.

### Preparing the Sample Ballot Mailing List

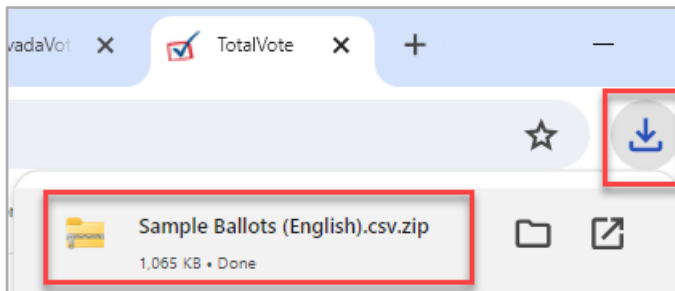
Sample ballot reports in TotalVote list the names and addresses of *all active voters* as of the date of the CSV export. They are not voter-specific representations of ballot styles.

**NOTE:** The export **will include** those who have opted out of Vote By Mail (“Opt Out VBM” in the voter profile) since [NRS 293.565](#) requires that all active registered voters receive sample ballot election information.

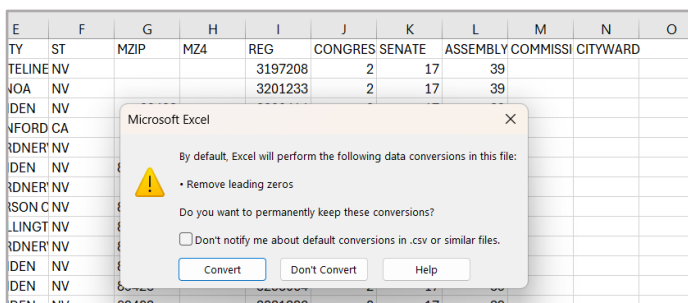
From the Navigation Bar, select **Reports > Reports**. Scroll down to the **Audit Export CSV** report heading and select **Sample Ballots (English)**.



TotalVote exports a .csv file of voter names and addresses to the downloads folder.



Double click on the file link in the Downloads folder to open the .csv file in your system's default spreadsheet application (usually Excel). Excel prompts to Remove Leading Zeros. Choose **[Convert]** or **[Don't Convert]** based on your vendor's preferred format.



Save the .csv file in spreadsheet format.

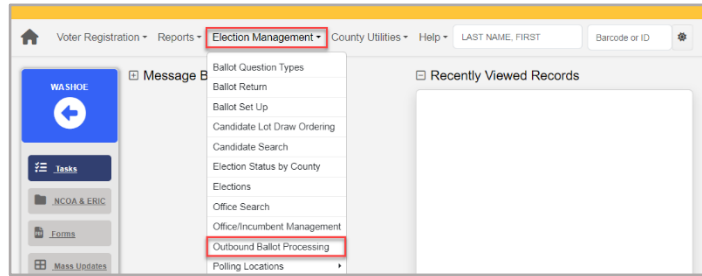
The file can be sent to your ballot mailing vendor or used to print labels in house.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	NAME	PREC	PT	MADOR	CITY	ST	ZIP	MZA	REG	CONGRESS	SENATE	ASSEMBLY	COMMISSION	CITYWARD
2			6 REP		CARSON	CA	95705				2	17	39	
3			41 NON		STATELINE	NV					2	17	39	
4			3 REP		GARDNER	NV	89410				2	17	39	
5			8 REP		GARDNER	NV	89460				2	17	39	
6			8 REP		GARDNER	NV	89460				2	17	39	
7			23 NON		MINDEN	NV	89423				2	17	39	
8			22 REP		MINDEN	NV	89423				2	17	39	
9			27 DEM		MINDEN	NV	89423				2	17	39	
10			18 NON		MINDEN	NV					2	17	39	
11			36 REP		ZEPHYR	CA					2	17	39	
12			11 REP		MINDEN	NV					2	17	39	
13			40 NON		STATELINE	NV					2	17	39	
14			2 REP		GARDNER	NV	89410				2	17	39	
15			25 REP		GARDNER	NV	89460				2	17	39	
16			10 OTH		WELLS	NV	89444				2	17	39	
17			33 REP		MINDEN	NV	89423				2	17	39	
18			17 NON		GARDNER	NV	89410				2	17	39	
19			34 IAP		CARSON	CA	95705				2	17	39	
20			16 NON		GARDNER	NV	89460				2	17	39	

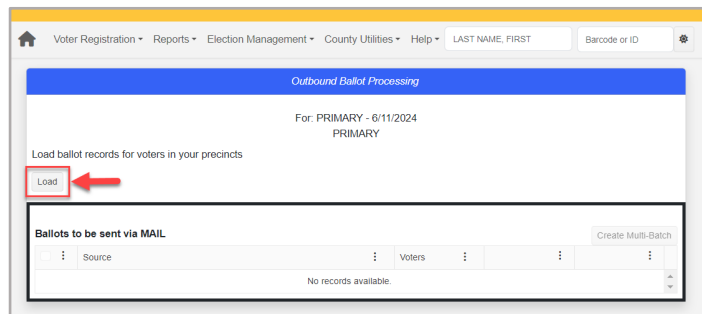
## Preparing Outbound Ballots

Outbound Ballot Processing occurs after the election is set up, contest and candidates entered, and ballot styles generated.

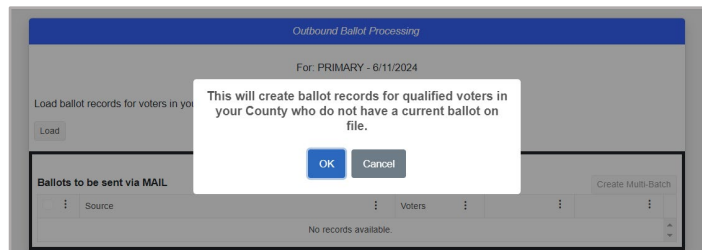
From the Navigation bar, select Election Management > Outbound Ballot Processing.



Click **[Load]** to generate a list of all voters eligible to receive a ballot.

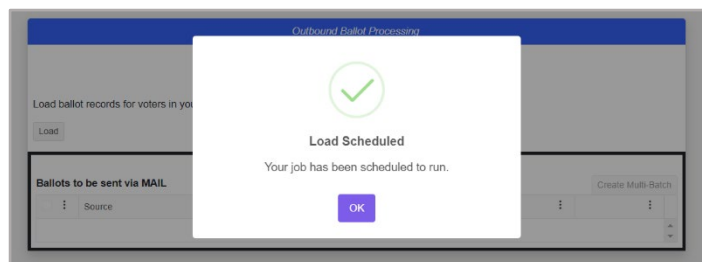


A dialog box appears confirming that you are creating (“loading”) ballot records for voters without a current ballot on file. Click **[OK]**.

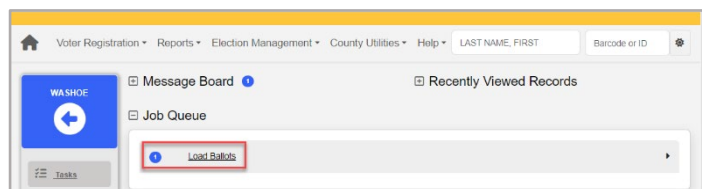


The ballot load is scheduled to run. Click **[OK]**.

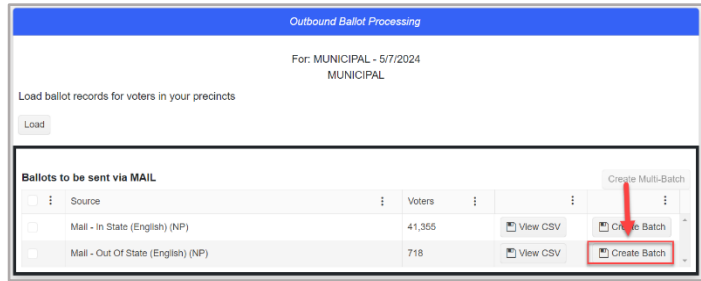
**Note:** The ballot load process can take several minutes. Wait and then refresh the page. **Do not click [Load] multiple times** in an attempt to expedite the process.



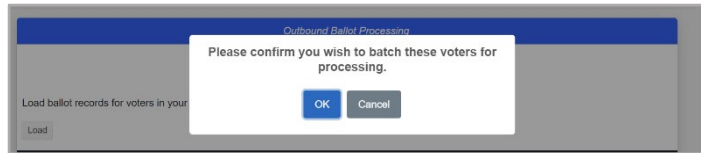
When the process is complete, ballot records are available by refreshing the browser or opening the **Job Queue** on the Dashboard. From the Job Queue, click **[Load Ballots]** > **[View]** to see ballot records.



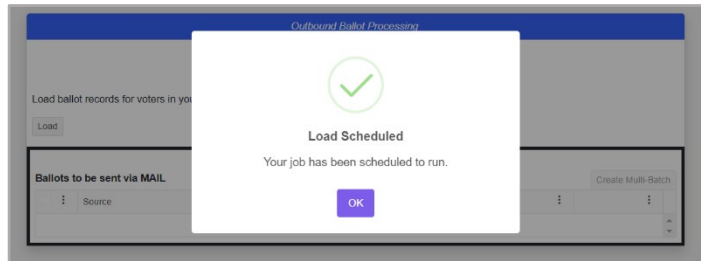
To prepare a batch of ballots for mailing, click **[Create Batch]**.  
**Note:** TotalVote has a 5,000-label limit.



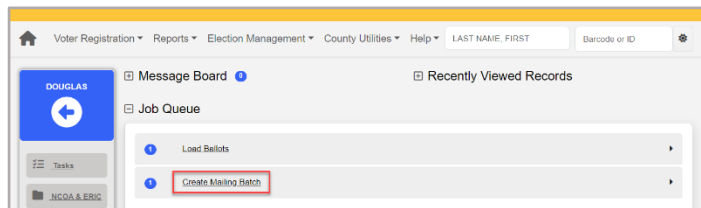
Click **[OK]** to confirm your selection.



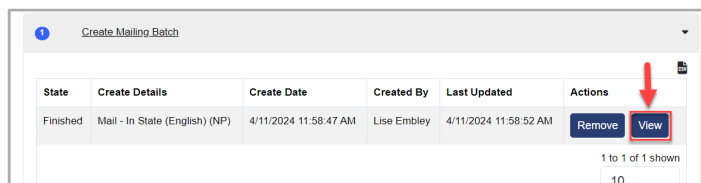
When the batch **Load Scheduled** notification appears, click **[OK]**.



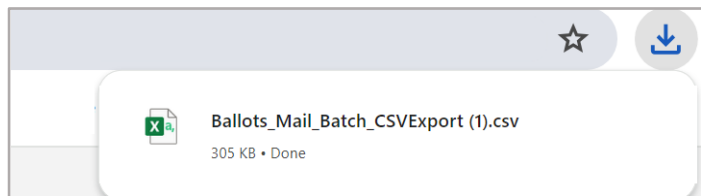
After the batch process is complete, an email notification is sent to the user's email and the batch is available in the **Job Queue** on the Dashboard. Return to the TotalVote Dashboard and select **Create Mailing Batch** from the **Job Queue** or refresh the **Outbound Ballot Processing** screen to display the loaded batches.



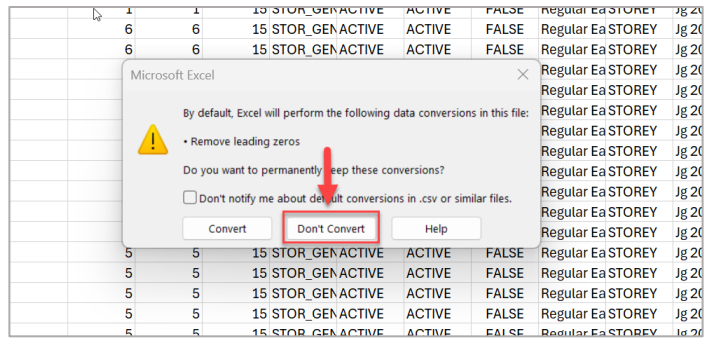
With mailing batch details displayed, select **[View]**.



The file is saved to the Downloads folder. Double click to open the file in the default spreadsheet, usually Excel. **Tip:** The sort order for the CSV export is set in user Preferences on the Dashboard.

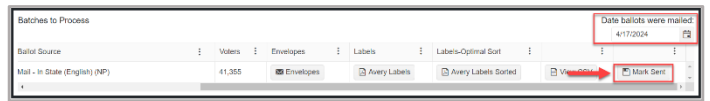


If a dialog opens prompting to remove leading zeros, click **[Don't Convert]**. Save the .csv file in spreadsheet format.

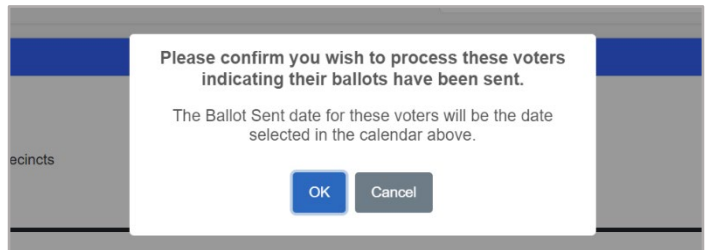


Review the spreadsheet to confirm the export includes all required information.

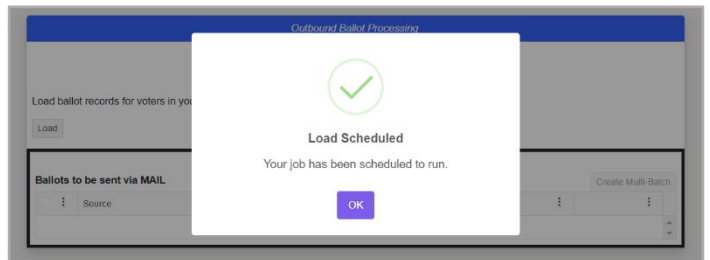
Enter or confirm the **Date ballots were mailed** date, scroll to the right and click **[Mark Sent]**.



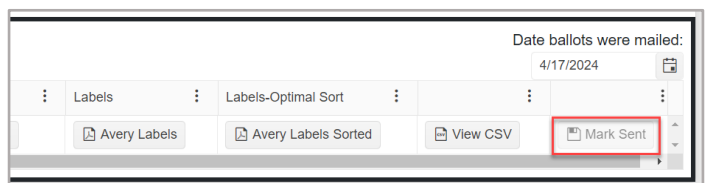
Confirm by clicking **[OK]**.



TotalVote again prompts **Load Scheduled**. Click **[OK]**.



Note that **[Mark Sent]** is now grayed out.



If you make changes or updates to voter records, re-run the **[Load]** and **[Mail Batch]** processes. Subsequent **[Load]** processes will be incremental, only loading ballots for new registrants, individuals who had registration updates that impacted their ballot, or individuals who needed replacements for a lost ballot.



## Reports

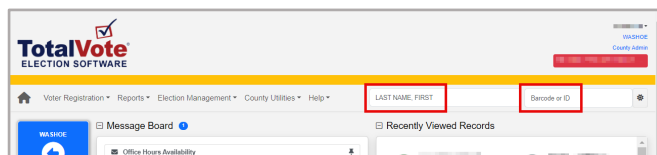
This document lists the steps to complete when utilizing the reporting functions listed in the Reports menu of TotalVotes navigation bar.

### Quick Search

Use Quick Search to quickly search for a voter by name, voter ID, or TotalVote barcode from a voter notification correspondence.

**NOTE:** Barcodes generated by legacy systems will not be recognizable by TotalVote.

Quick Search is in top-right corner of every TotalVote page.



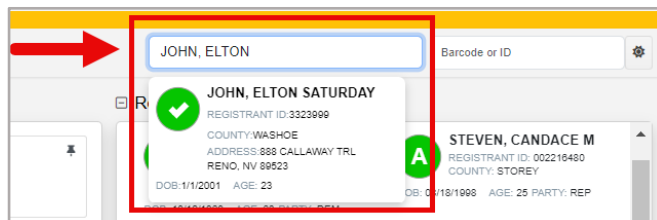
Search by name or birth date:

- ▶ Place cursor in **LAST NAME, FIRST** text field.
- ▶ **Enter** voter's last and first name.
- ▶ **Or Type in** voter's birth date as XX/XX/XXXX.

Any voter matching search will display in a dropdown menu.

- ▶ **Select** correct voter to view voter profile.

**NOTE:** Quick Search displays registrants in any Status in the **User's assigned County**.



Search using Barcode or Registrant ID.

- ▶ **Scan** or **enter** barcode or registrant ID into the Barcode or ID text field.
- ▶ **Press Enter** to view voter's profile.

**NOTE:** A registrant Barcode or ID search displays registrants in any Status **statewide**.



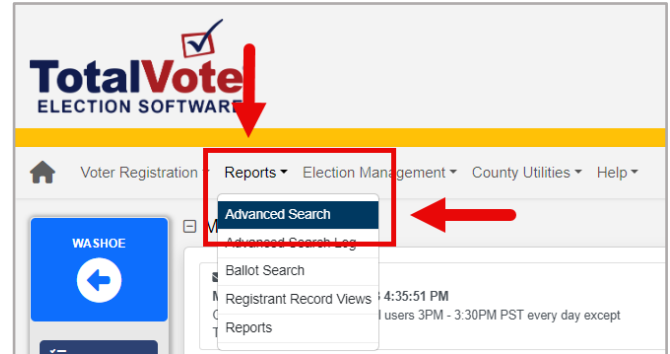
## Advanced Search

Use Advanced Search for more granular searches of voter registration records. There are a variety of tabs where search parameters are grouped. User can pick which data fields to query (from multiple tabs at a time, if needed) to build a customized search query. Filters are available to refine your search to include voting, elections, ballots, districts/precincts, petitions, poll workers, questions, contests, contest with precincts, and county precincts with splits.

## Defining Your Search Parameters

### From **Navigation Bar**:

- ▶ Select Reports > Advanced Search.

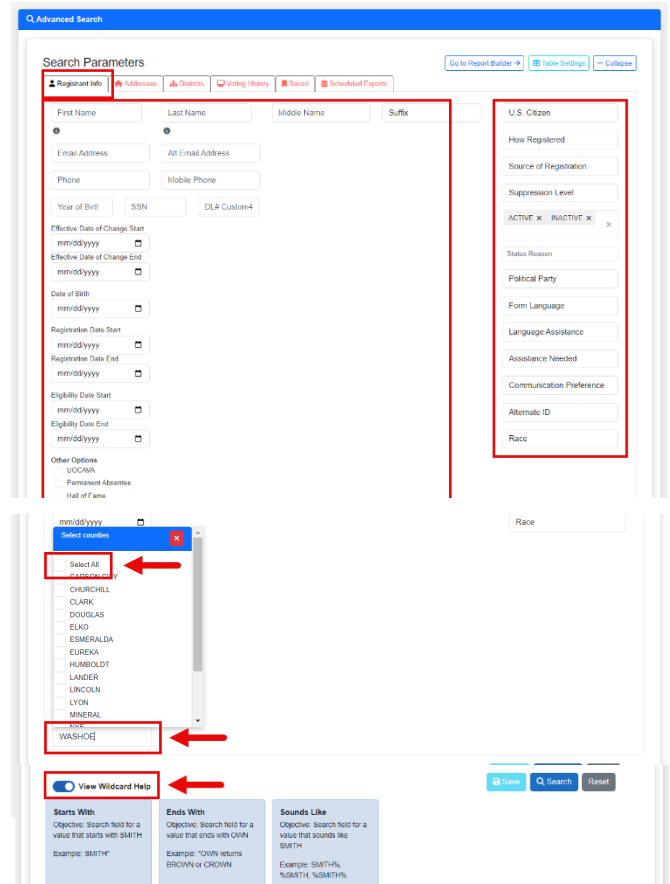


### Under **Search Parameters**:

- ▶ Select Registrant Info tab.
- ▶ **Enter** and/or select all search parameters.

**TIP:** Advanced Search will only search Active and Inactive registrants by default.

- To search all registrants, click the **[X]** on ACTIVE and INACTIVE labels to clear the **STATUS REASON** field.



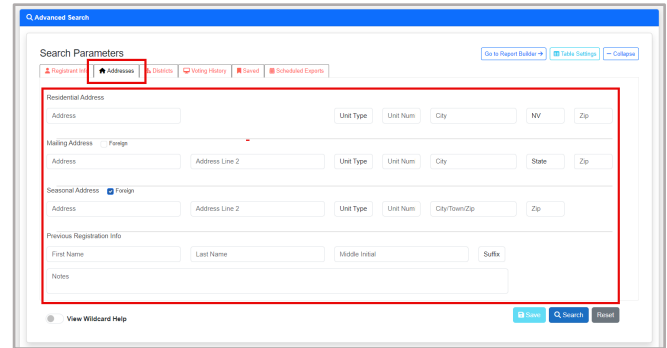
**TIP:** Advanced Search defaults to user's assigned county.

- To perform a statewide search, choose **SELECT ALL** in the Select Counties filter.
- Toggle on View Wildcard Help for tips on how to define and improve your search.

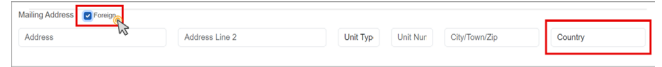


To search by address information:

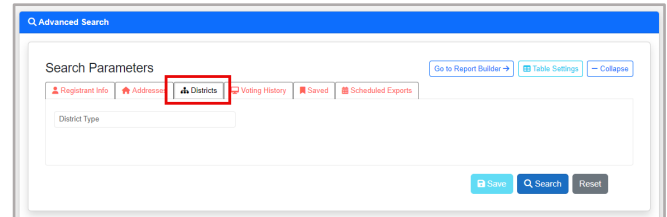
- ▶ Select **Addresses** tab.
- ▶ **Enter** address search parameters.



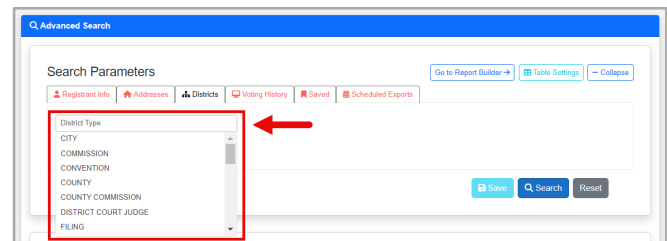
- ▶ **Tick the Foreign** checkbox to search foreign addresses and/or search by country.



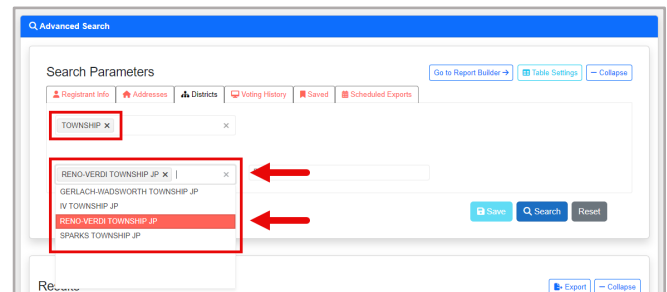
- To search by district, district type, or precinct:
- ▶ Select **Districts** tab.



- ▶ Choose **District Type(s)** from dropdown menu.

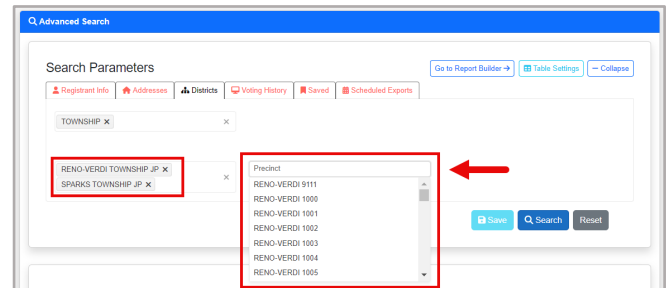


- ▶ Choose **District(s)** from dropdown menu, if available.



- ▶ Choose **Precinct(s)** from dropdown menu, if available.

TIP: Choose one or more District Types, Districts, and Precincts.



Once all search parameters have been entered:

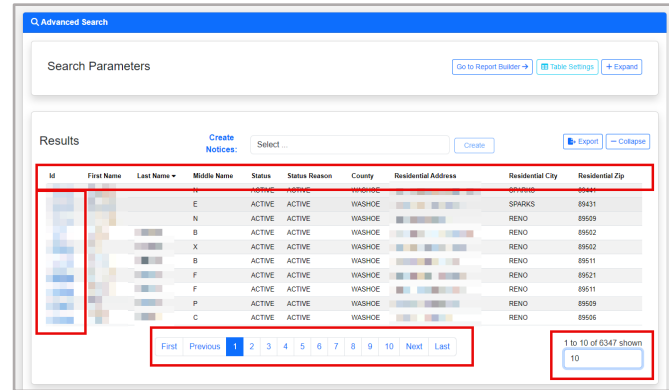
- ▶ Click [Search].



**Results** will display below search parameters.

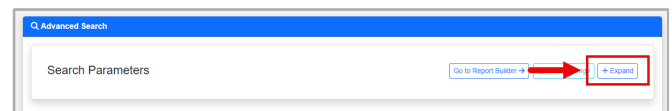
- ▶ Click **column heading** to sort results of column alphabetically or numerically.
- ▶ Click **ID number** (blue hyperlink) to view Voter Profile.
- ▶ Click **[First], [Previous], [Next], [Last]**, and page numbers to navigate pages of results.
- ▶ Select a **number of results** to show on each page (i.e. 10, 25, 50, 100).

**NOTE:** Paging of all results is not available when results are over 100,000 records. To view all 100,000+ records, export the search results.



To **change** or **update** search parameters:

- ▶ Click **[+ Expand]** on Search Parameters to edit search parameters and run search again.



To **remove** all search parameters quickly:

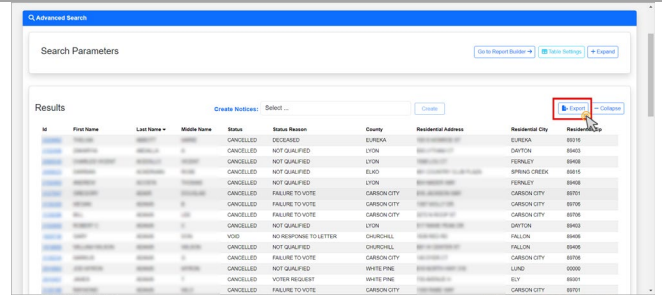
- ▶ Click **[Reset]**



## Exporting Search Results

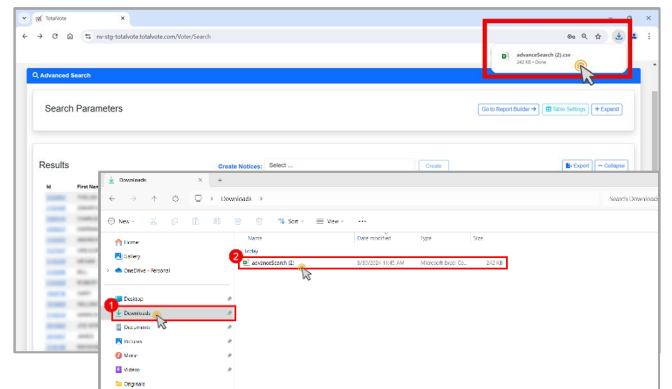
From **Results**:

- ▶ Click **[Export]**.



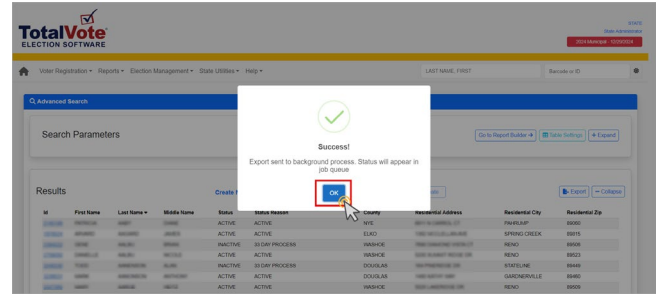
**IF** results contain **less** than 100,000 records:

- Results will export as CSV.
- ▶ Open CSV from web browser downloads queue or computers downloads file explorer.

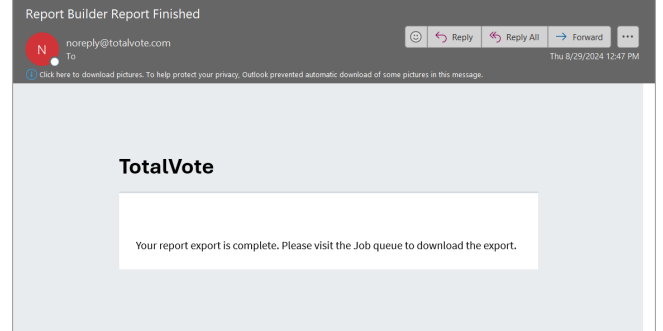


**IF** results contain **more** than 100,000 records:

- Results will export in background process and can be viewed in **Job Queue** when completed.
- ▶ Click **[OK]** on Success notification.

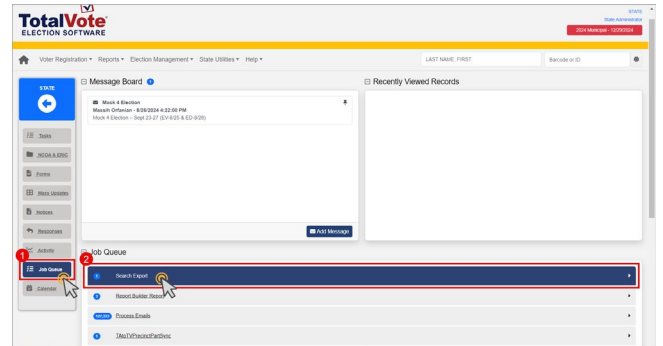


When background process is complete and report is ready to be viewed, TotalVote will send user an **email notification**.



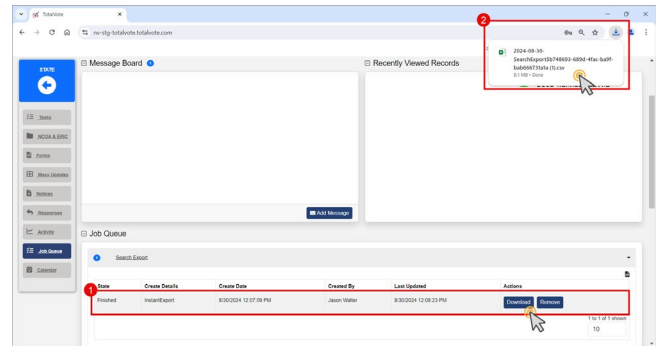
**Navigate** to TotalVote landing page.

1. Select **[Job Queue]** from side task bar.
2. Select **[Search Export]** from Job Queue list.

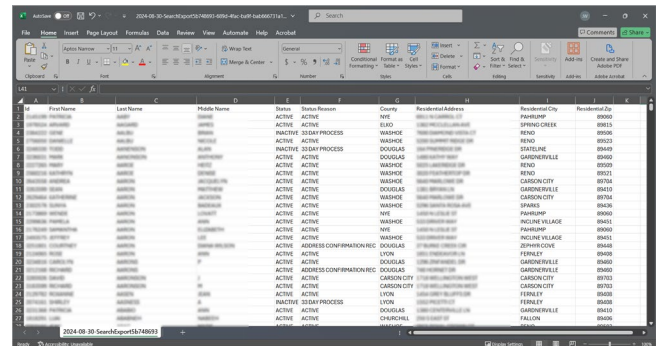


Locate **Finished** report in queue.

1. Click **[Download]**.
2. Open CSV from web browser downloads queue or computers download file explorer.



Report will be viewable in CSV/Excel.

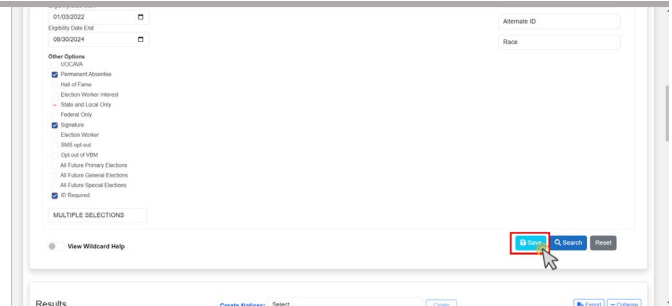


## Saving Advanced Search

- Saving an Advanced Search allows you to re-run previous searches without needing to recall or re-enter the search criteria. Factors to consider:
- Saved searches are unique to a user account.
- Only the User who created a saved search can delete it.
- Users can run a saved search any time, excluding deleted saved searches.
- Saved searches cannot be edited. However, Users can run an existing saved search, edit the search criteria, and then save it with a new name. This will not affect the original saved search.
- Saved searches are available to other Users and can be run by anyone with the appropriate permissions.

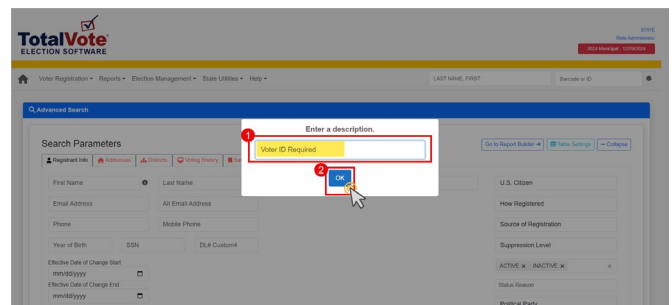
After selecting and entering all parameters of an advanced search:

- ▶ Click **[Save]**.



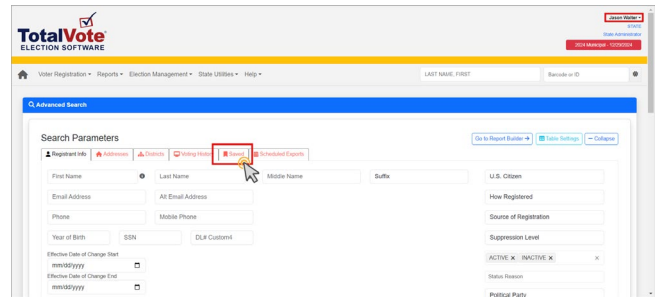
Enter a description notification will appear.

1. **Type in** a description/title.
2. Click **[OK]**.



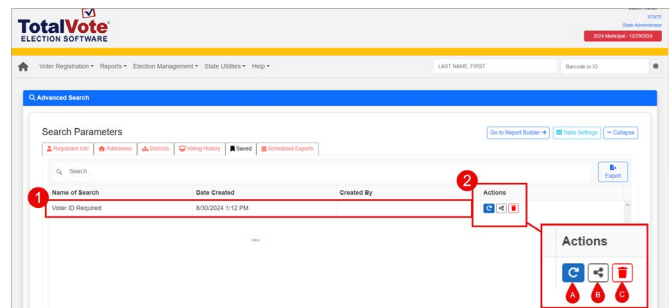
To view and run saved search:

- ▶ Select **Saved** tab under Search Parameters.



Saved searches will be listed.

1. **Locate** saved search.
2. Select an **Action** to complete:
  - A. **Load** – Run search
  - B. **Share** – Share search with other counties/users
  - C. **Delete** – Delete search from saved searches

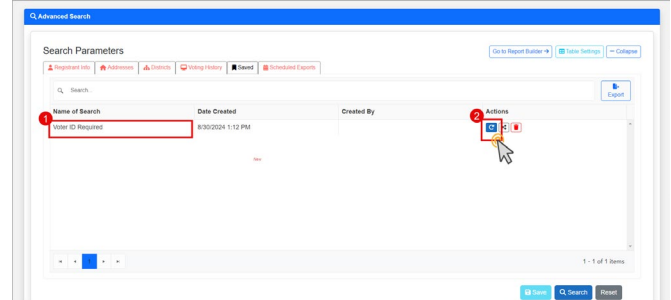


## Schedule a Saved Search to Run Automatically

Schedule a saved search to run automatically on a daily, weekly, monthly or yearly basis.

1. **Select** saved search to schedule.
2. Click **[Load]** to populate search.

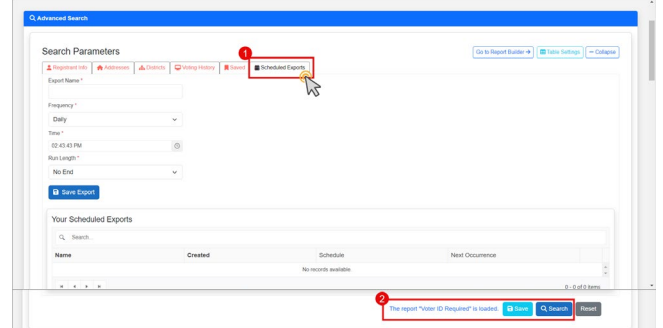
**Results** of search will be shown.



From **Search Parameters**:

1. Select Scheduled Exports tab.
2. **Confirm** correct saved search is loaded.

**NOTE:** Title of the current saved search loaded will be displayed next to [Save] and [Search] button of Search Parameters.



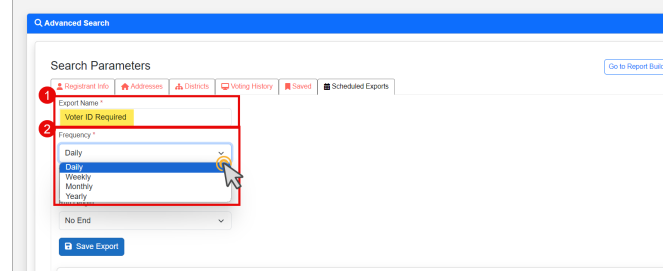
1. **Type in** name of export into **Export Name\*** text field.
2. **Choose** frequency from **Frequency\*** dropdown menu:

**Daily** – Choose time of day only

**Weekly** – Choose day of week & time

**Monthly** – Choose day of month & time

**Yearly** – Choose month, day & time

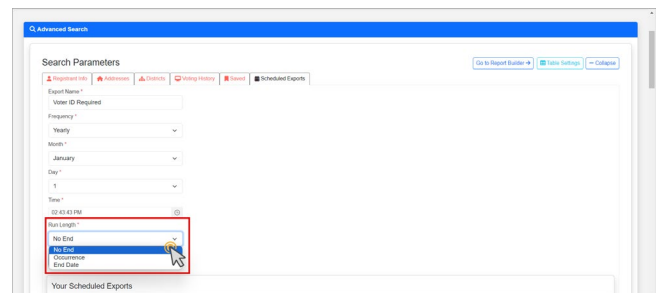


- ▶ Choose **Run Length\*** from dropdown menu:

**No End** – Will run continually until manually stopped/deleted

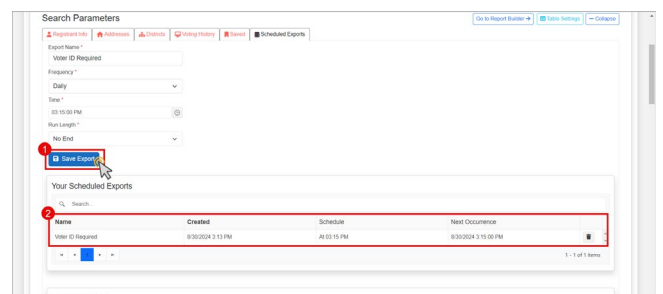
**Occurrence** – Set number of times search will run i.e. 3 times, 8 times, etc. before stopping

**End Date** – Set a date in future when search is to stop running

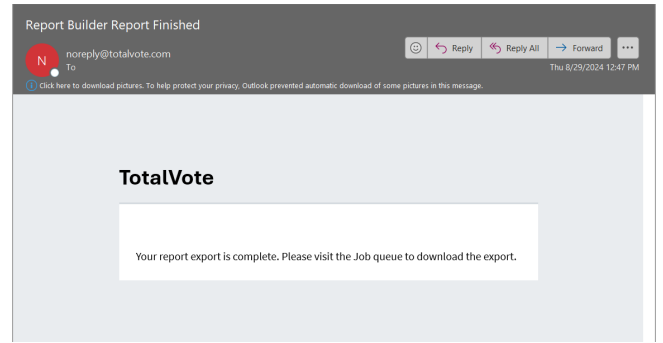


1. Click **[Save Export]**.
2. Scheduled export will be shown under **Your Scheduled Exports**.

**NOTE:** Saved scheduled exports cannot be edited once created, only deleted. If changes need to be made to export schedule, delete scheduled export and start again. To delete a scheduled export, click the **[Trash]** icon.



When scheduled export runs at designated time, TotalVote will send user an **email notification** when export is ready to view.

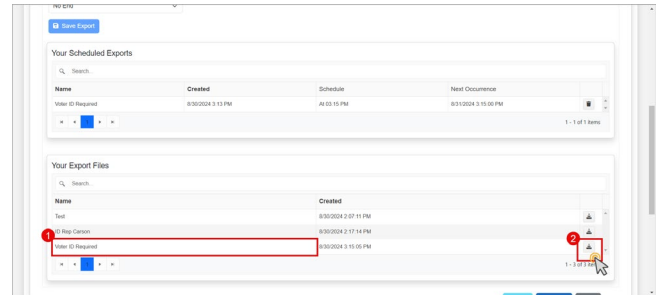


User can download completed export one of two ways.

Export can be downloaded from **Scheduled Exports** tab under **Your Export Files**.

1. **Locate** correct export.
2. Click **[download]** icon.

Open export from web browser downloads queue or computers downloads file explorer.

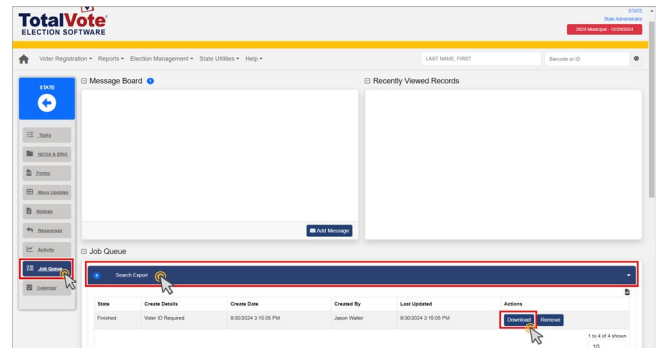


Export can also be downloaded from users **Job Queue**.

**Navigate** to TotalVote landing page.

1. Select **[Job Queue]** from side task bar.
2. Select **[Search Export]** from Job Queue.
3. Click **[Download]**.

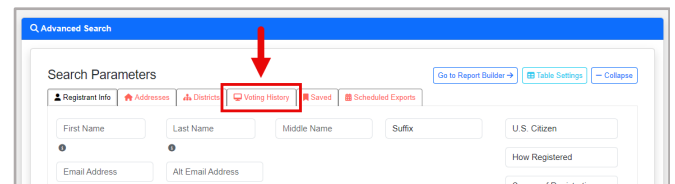
Open CSV from web browser downloads queue or computers downloads file explorer.



## Search by Voting History

Under **Search Parameters**:

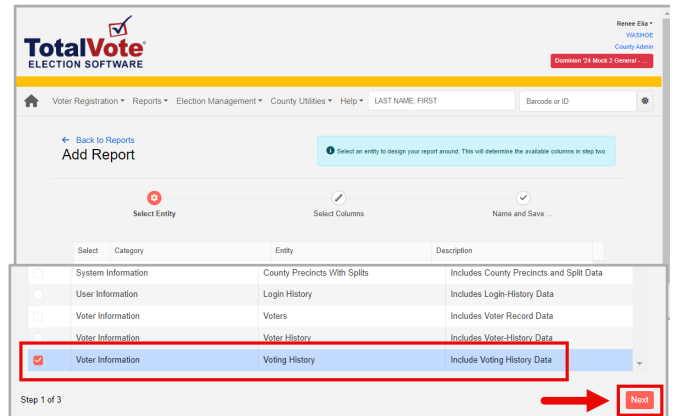
- ▶ Select Voting History tab.



**Report Builder** opens.

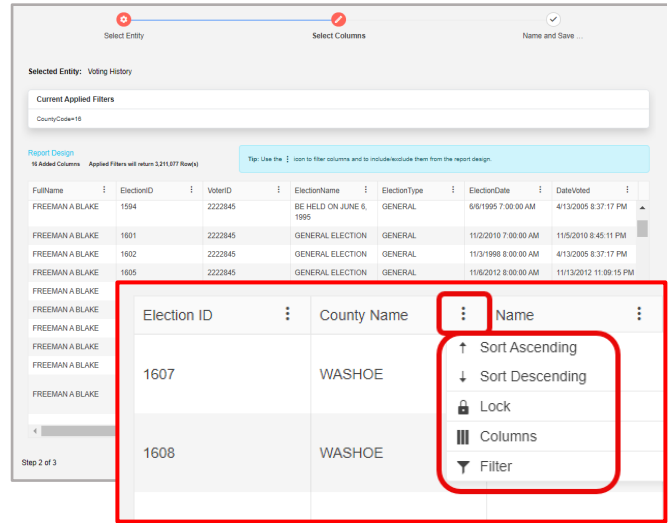
**Voting Informationn | Voting History |Include Voting History Data** entity is automatically selected.

- ▶ Click **[Next]**.



The **Voting History** report data is displayed.

- ▶ Click a **vertical ellipsis [ : ]** from a column header to sort, lock, add/remove column(s) and/or filter columns data.

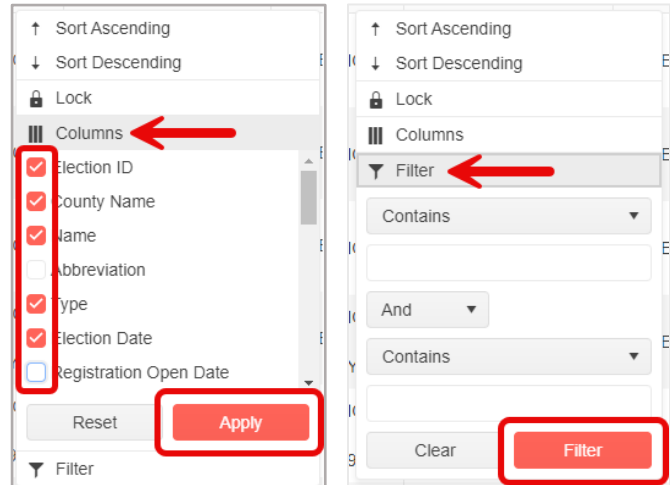


To add/remove column(s):

- ▶ Select **Columns** and tick/untick column(s) and click **[Apply]**.

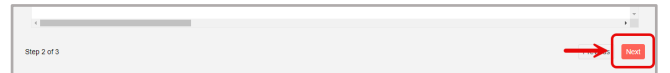
To filter column data:

- ▶ Select **Filter** and choose **filter type** and enter **data point** and click **[Filter]**.



Once all parameters have been entered:

- ▶ Click **[Next]**.

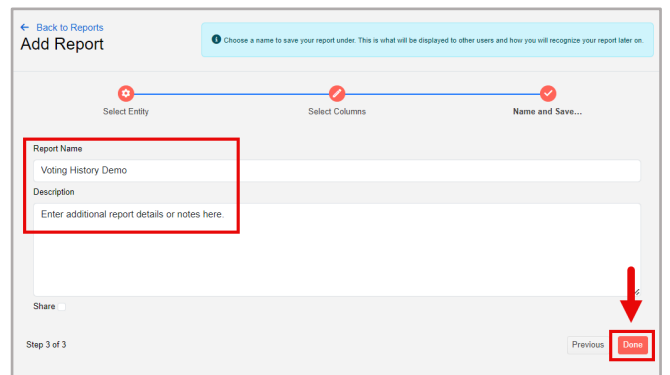


- ▶ Type in **Report Name** and **Description** identifying its intended purpose and data it contains.
- ▶ Click **[Done]**.

Success notification will appear.

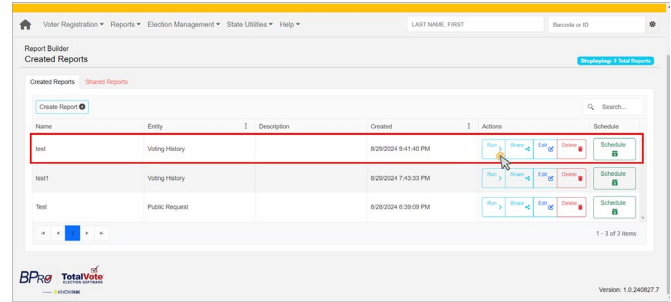
- ▶ Click **[OK]**.

**NOTE:** Report will be saved and can be ran again in the future as well as be available for other users to run at any time. The Name and Description of the report will be valuable information for users to find, understand its purpose, and know its data set.



## From the **Created Reports** tab:

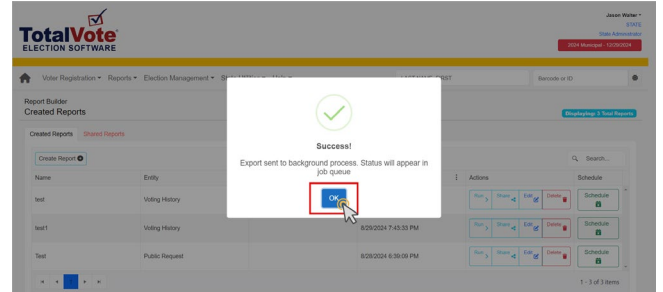
- ▶ Locate created report.
- ▶ Click **[Run]** under Actions.



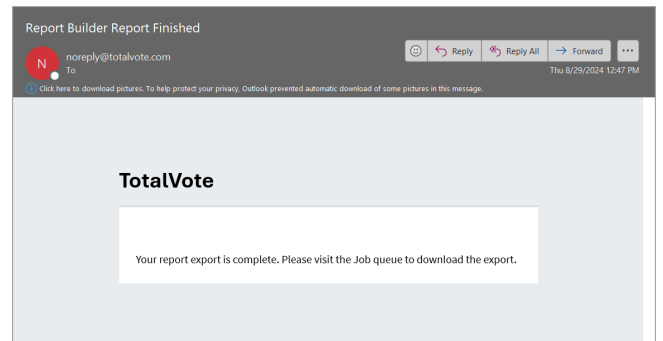
## Success notification will appear.

- ▶ Click **[OK]**.

Report will export in background and can be viewed in **Job Queue** when complete.

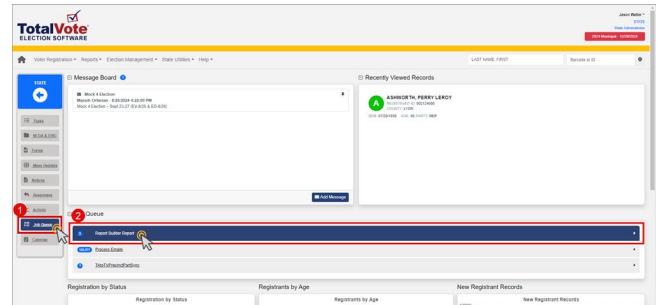


When report is ready to be viewed, TotalVote will send user an **email notification**.



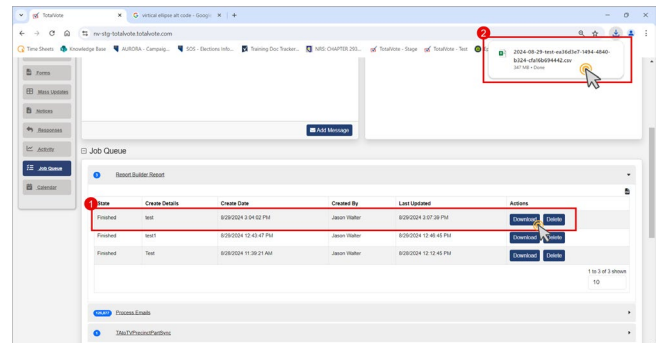
## Navigate to TotalVote landing page.

1. Select **[Job Queue]** from side task bar.
2. Select **[Report Builder Report]** from Job Queue.



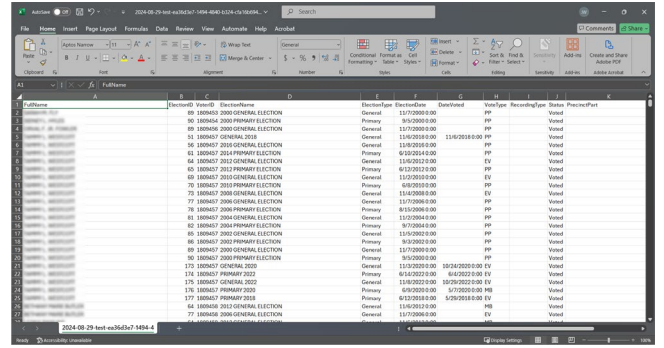
## Locate **Finished** report.

1. Click **[Download]**.
2. Open CSV from web browser downloads queue or computers downloads file explorer.





Report will be viewable in CSV/Excel.

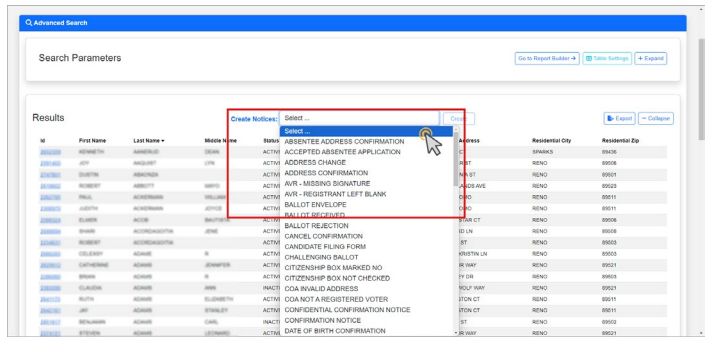


## Creating Notices from Advanced Search Results

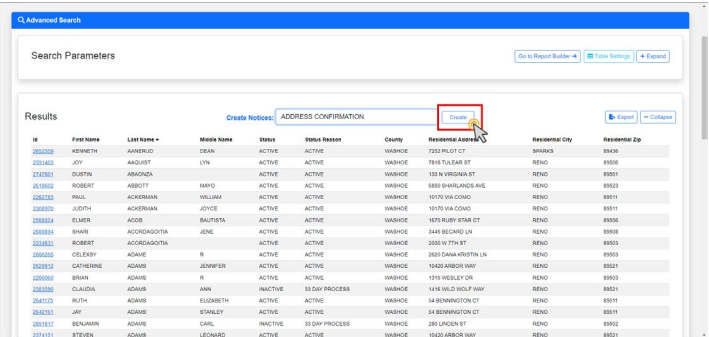
Generate notices for registrants who meet the Advanced Search parameters. Notices will only be created if the voter does not already have an unsent notice of selected type created.

From **Results** of completed Advanced Search:

- ▶ Select notice type from **Create Notice** dropdown menu.

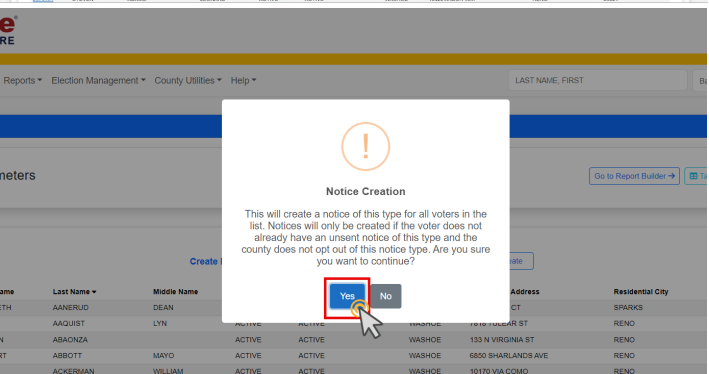


- ▶ Click [Create].



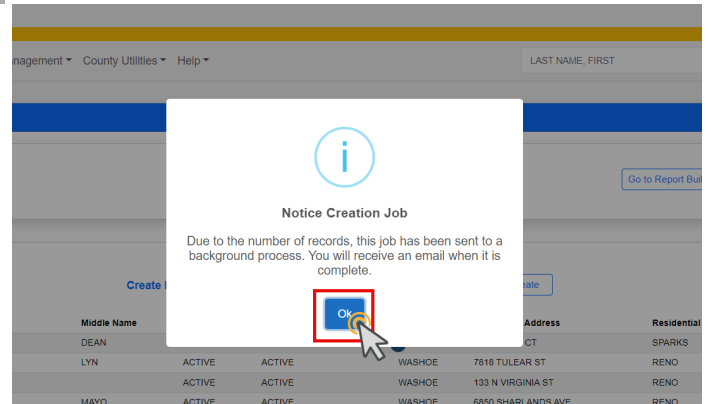
**Notice Creation** notification is displayed.

- ▶ Review and confirm creation.
- ▶ Click **[Yes]**.

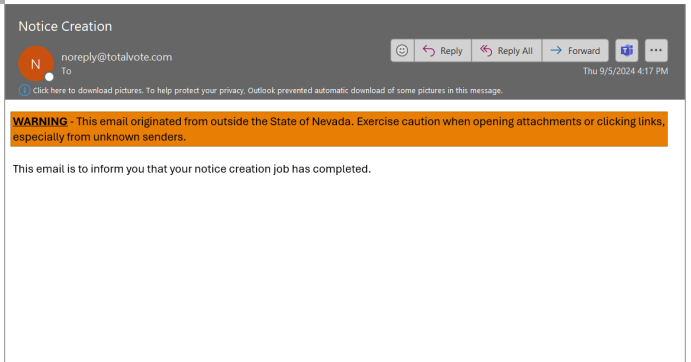


**Notice Creation Job** notification is displayed.

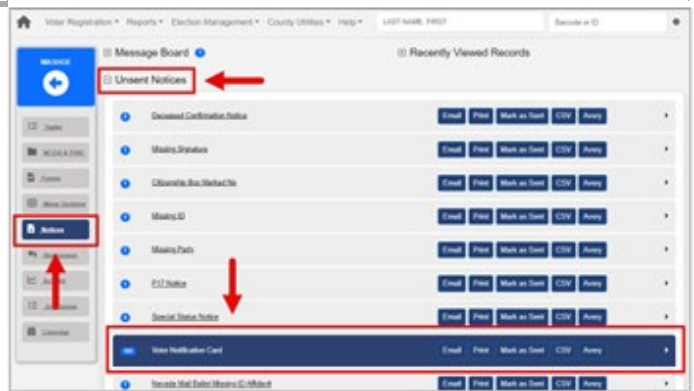
- ▶ Click **[OK]**.



TotalVote will send user an **email notification** when background process is complete, and created notices are available to be processed.



For instructions on how to process unsent notices see **Processing and Sending Unsent Notices** user guide.



## Search Tips

### Wildcard Help

Starts With

- Objective: Search field for a value that starts with SMITH
- Example: SMITH\*

Ends With

- Objective: Search field for a value that ends with OWN
- Example: \*OWN returns BROWN or CROWN

Sounds Like

- Objective: Search field for a value that sounds like SMITH
- Example: SMITH%, %SMITH, %SMITH%

## Searching by Name

Start a search using the **first three letters** of the voter's **First Name** and **Last Name**, as well as their **Date of Birth**. An asterisk (\*) may be used as a "wildcard" to perform partial name searches. For example:

- "DAVI\*" may return names David, Davis, Davina, and so forth.
- If searching for "Mickey Mouse" born on August 16, 1965, search parameters would look as follows:
  - First Name: MIC\*
  - Last Name: MOU\*
  - Date of Birth: 08/16/1965.

Some people **shorten their names** or use **nicknames**. If you don't get a match one way, try a different version of the name. For example:

- Patricia might be in the system as "Pat."
- For Michael or Mike, you should use "Mi\*" as the First Name to bring up all possibilities.
- Someone named William might use Will or Bill.

## Searching by Date Range

Certain fields (**Registration Date**, **Effective Date of Change**) work on date ranges. For example:

- To search for a single date rather than a range, enter the date in the first date field for that category and leave the second field blank.
- To search for results up to and including a specific date, use both date fields on this page. For example, to search for registration dates prior to and including 10/06/2019, enter a Start Date of 1/1/1900 and an End Date of 10/7/2019.

## Searching by Address

**TIP:** Enter criteria on the [Addresses] tab to limit results by geography.

Enter the Street Address portion only. Do not enter City/State/Zip, as these are sometimes written incorrectly on registration forms.

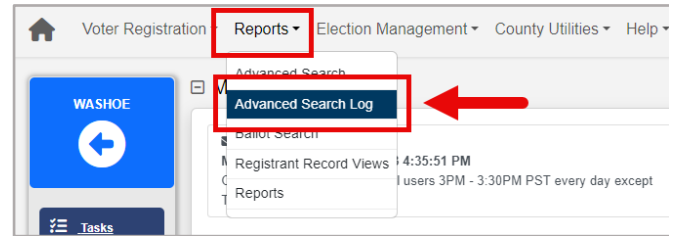
- Enter entire street address in the Address field, including the **Number**, **Street Name**, and **Street Type** (ST, DR, PKWY, etc.).
- Enter **Street Type** as an abbreviation (ST, RD, PKWY, etc.); **DO NOT** type the full word (STREET, ROAD, PARKWAY, etc.).
- **DO NOT** enter a Unit Number. This will not return any results.
- **TIP: Still struggling to find a record?** Try reducing the number of search parameters. For example, if you entered First Name, Last Name, Date of Birth, SSN, and DL, try removing the Date of Birth and SSN.

## Advanced Search Log

The Advanced Search Log keeps a record of all Advanced Searches performed by each TotalVote User. County Administrators can query Advanced Searches completed by each user and run the search for their own use.

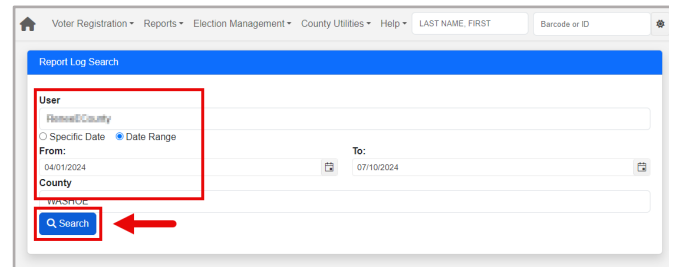
### From **Navigation Bar**:

- ▶ Select Reports > Advanced Search Log.



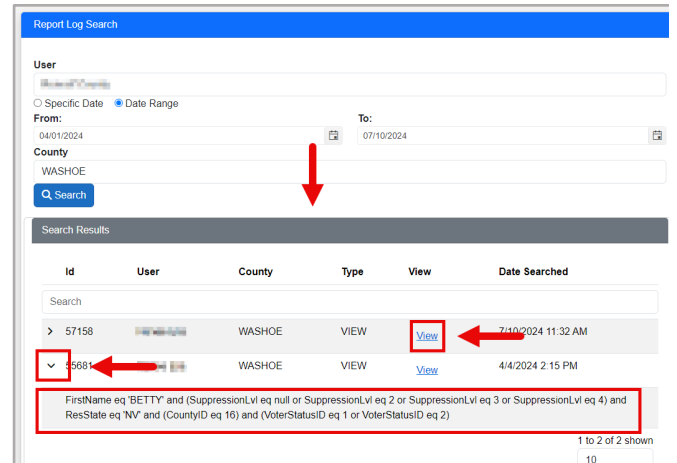
### Report Log Search screen will display.

- ▶ Select **Username** from User dropdown menu.
- ▶ Choose to search by **Specific Date** or **Date Range**.
- ▶ **Enter** or select date or date range.
- ▶ Select a **county** from County dropdown menu (optional).
- ▶ Click [Search].



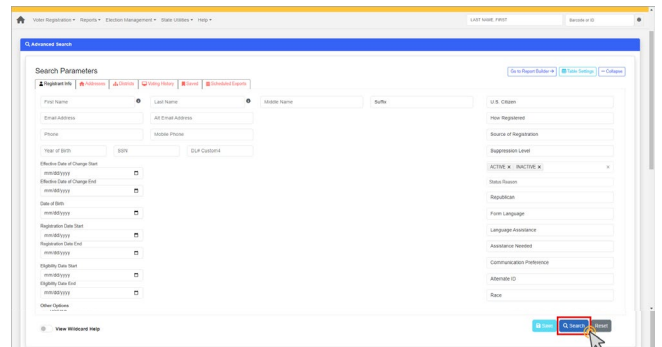
### Results will display.

- ▶ Click [**>**] to show search parameters of a search.
- ▶ Click **View** (blue hyperlink) to load all search parameters to a new Advanced Search.



Advanced Search will open in new browser window with all search parameters entered and/or selected.

- ▶ **Verify** all parameters are correct.
- ▶ Click [**Search**] to run search.



## Ballot Search

More information to come.

## Registrant Records Views

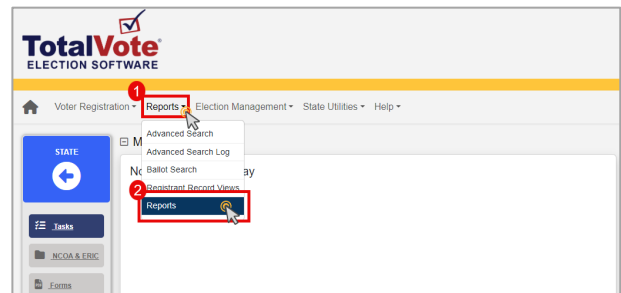
More information to come.

## Reports Canned Reports

Canned reports are pre-loaded reports used for starting election preparations and making sure that precincts are correct. There are a variety of canned reports available. For a description and explanation of each canned reports data see Canned Reports Definition.

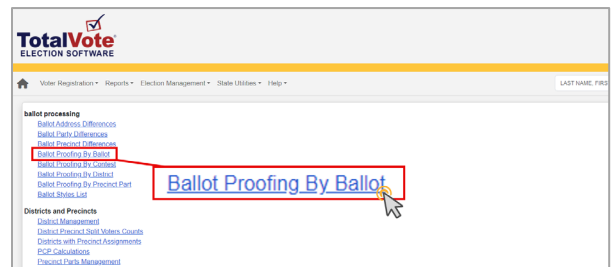
From **Navigation bar**:

- ▶ Select Reports > Reports.



- ▶ **Select** a report from listed canned reports.

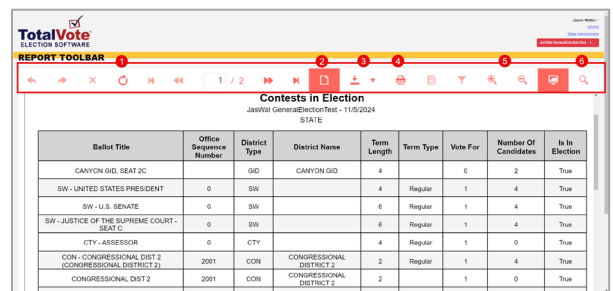
**NOTE:** If selecting a report from **Audit Export CSV** or **State CSV**, report will automatically download as CSV. **Open** report from **web browser downloads queue** or computers **downloads file explorer**.



**Report window** will load and display selected report.

**Reports toolbar:**

1. Refresh report
2. Print view
3. Download report (to PDF, CSV, excel, etc.)
4. Print
5. Zoom in/out
6. Search for key words.



**IF** a report allows data to be filtered, filter options will be shown to right of report.

- ▶ 1. **Choose** all needed filter(s).
- ▶ 2. Click [**Preview**] to load filtered report.

For this example, Registered Voters by Precinct report is filtered by **Assembly District** and **Active Voters Only**.

District	DEM	REP	GRN	LBT	PND	OTH	TOTAL
ASSEMBLY 40	8,942	39%	13,638	59%	26	0%	23,617
<b>Total</b>	<b>8,942</b>	<b>39%</b>	<b>13,638</b>	<b>59%</b>	<b>26</b>	<b>0%</b>	<b>23,617</b>

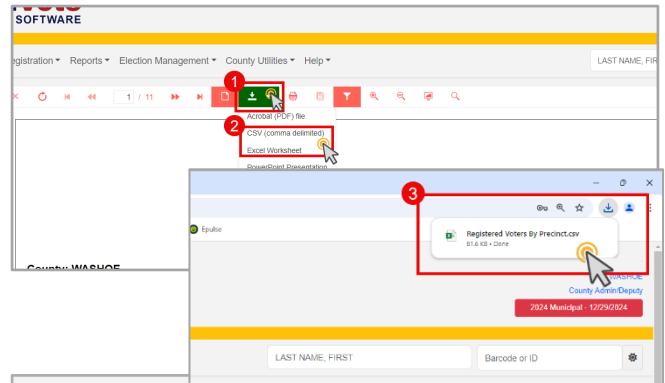
District	DEM	REP	GRN	LBT	PND	OTH	TOTAL
ASSEMBLY 38	1,917	19%	8,155	80%	12	0%	10,222
<b>Total</b>	<b>1,917</b>	<b>19%</b>	<b>8,155</b>	<b>80%</b>	<b>12</b>	<b>0%</b>	<b>10,222</b>

District	DEM	REP	GRN	LBT	PND	OTH	TOTAL
ASSEMBLY 39	7,125	20%	19,995	73%	17	0%	27,445

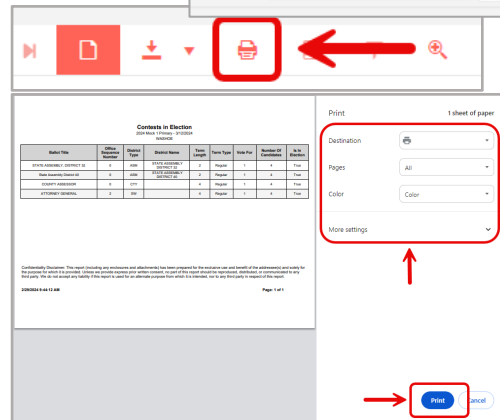
To **download** report:

- Click [Download icon].
- Select file format i.e. CSV, Excel, PPT, PDF.
- Open file from web browser downloads queue or computers downloads file explorer.



To **print** a report:

- ▶ Click [Printer icon].
- Print dialog box displays.
- ▶ **Select** print settings.
- ▶ Click [**Print**].



## Canned Report Definitions

**IMPORTANT:** Some reports listed below may not currently be available in TotalVote. They will be available in a later Phase. As they become available, the Appendix will be updated.

### Ballot Processing

**TIP:** Reports in this category allow for exporting to PDF and Word ONLY.

**Ballot Proofing By Ballot:** Lists all ballot styles with ballot party precinct parts and all contest and candidates. Prerequisite: Creating Ballot Styles.

**Ballot Proofing By Contest:** Lists all contests for active election by ballot styles showing all precinct parts ballot styles. Prerequisite: Creating Ballot Styles.

**Ballot Proofing By District:** Lists all districts that have ballot styles showing all precinct parts ballot styles and contests/candidates. Prerequisite: Creating Ballot Syles.

**Ballot Proofing By Precinct Part:** Each precinct part in election listed with every ballot style, ballot party and contests and candidates. Prerequisite: Creating Ballot Syles.

**Ballot Styles List:** Shows all the ballot styles for the current election (Ballot Name, Ballot #, Precinct, Precinct Part, Active/Inactive registrants, Underage Registrants, and County). Prerequisite: Creating Ballot Syles.

### Districts and Precincts

**TIP:** Reports in this category allow for exporting to PDF, CSV, Excel, PPT, and Word ONLY.

**District Management:** Shows all the changes made to districts within a county with a specified date range. Prerequisite: Changes have been made to a district in a county.

**District Precinct Split Voters Counts:** Shows the voter counts by precinct on the method used to vote. (Polling Place - Inactive/Provisional/Late Registration, or Absentee - Active/Inactive/Provisional/Late Registration).

**Districts with Precinct Assignments:** Shows all the precinct splits/parts for each district within the current county.

**PCP Calculations** - Precinct Committee Persons for all the precincts in the current county it calculates the number of PCP based on the # of voters per PCP, with a min and max PCP.

**Precinct Part Management:** Shows a log of all the changes made to precincts with the current county. Prerequisite: Any changes made to precinct parts in a county.

**Precincts with District Assignments:** Shows all the districts assigned to precinct parts in the current county.

### Election Management

**TIP:** Reports in this category allow for exporting to PDF, CSV, Excel, PPT, and Word ONLY.

**Candidate in Election:** Shows all the candidate information by contest for the current election (Name, Filing Date, Status, Party, Ballot Order, and Write-In).

**Contests in Election:** Shows all the contests for the current election and current county in office sequence order (Ballot Title, Office Seq No, District Type, District, Term Length, Vote For, # of Candidates, Is In Election).

**Cost Tracking:** A report that you choose an amount, and it will split that amount based on the % of total voters a county has.

**Election Districts Included in Election:** A filterable list of all the districts in the current election by district type.

**Summary Bucket Report:** Shows the vote types by precinct for the current county (Election Day, Mail, Provisional, Total). Prerequisite: Upload results files or manually enter results for Provisionals, Mail, Election Day, etc.

### Voter Registration

**TIP:** Reports in this category allow for exporting to PDF, CSV, Excel, PPT, and Word ONLY.

**Active Inactive Voters by District:** Shows Active/Inactive voters by District, broken out by Party.

**Active Inactive Voters by Precinct:** Shows Active/Inactive voters by Precinct, broken out by Party.

**Active Voters by District:** Shows Active voters by District, broken out by Party.

**Active Voters by Precinct:** Shows Active voters by Precinct, broken out by Party.

**Active Audit Report:** Shows the logs of all the employee changes made to voters within a specified time range.

**Household List:** This report is a list of all households that have at least one registered voter at the address based upon chosen search parameters. Prerequisite: Enter in District Name.

**Household Mailing Labels:** Export to create household mailing labels for sample ballots for eligible Active voters for the current election.

**Late Notice Stats:** Shows a list of reports that have code hooks that require responses by the voter in a certain number of days.

**Opt Out Report:** Allows Users to select from election, status, and party, to filter down on Opt Out voters (Opt out of VBM).

**Opt Out Report with Voter Data:** Allows Users to select from election, status, and party, to filter down on Opt Out voters (Opt out of VBM) with the Voter ID and Vote name listed.

**Registered Voters By Precinct:** Shows count of all the registered voters by party. Filterable by district type and Active Only for the current county.

**Registered Voters by Split:** Shows the count of all the registered voters in a split for the current county. Filterable by voter status.



**Sent (Printed) Notices with Address:** Shows all the notices that have been marked as sent for a given date range and notice type.

**Statewide Registered Voter Statistics by Party:** Shows the count and percent of all voters by county and party. Filterable by Active Only.

**Statewide Voters by County:** Same as previous report but without the percentages.

**Voter Counts By District Type:** Shows a count of all the voters for the current county by district type. Filterable by district type and voter status.

**Voter Registration Statistics by Congressional and Legislative:** Shows the voter counts grouped by district type then by district.

**Walking Odd Even Report:** Shows the walking list for voters, grouping by precinct split, then street, then house. filterable by odd/even, precincts, splits, districts, and voter status.

### Audit Export CSV

**TIP:** Reports in this category allow for exporting to CSV ONLY.

**Ballot Question Changes:** Shows the logs of all the changes made to ballot questions.

**Candidate Changes:** Shows the logs of all the changes made to candidates.

**Canvass - County Summary:** Filters based on Party that shows information by contest and candidate result information. Prerequisite: Results must be uploaded to TotalVote for canvass reports to display results.

**Canvass - Discrepancies Summary:** Shows all the ballots that have been sent but not received or rejected. Prerequisite: Results must be uploaded to TotalVote for canvass reports to display results.

**EASE File Upload:** Provides data for the counties to upload to the state.

**Office Changes:** Shows the logs of all the changes made to offices.

**Sample Ballots (English):** Provides the counties with voter data to provide mail vendor.

**Precinct Information for TotalAddress:** Shows all the precinct codes, precinct name, and county FIPS codes from TotalAddress.

**Precinct without Ballot Styles:** Pulls ballot styles assigned to precinct for active election. Can be used as an audit tool for county users.

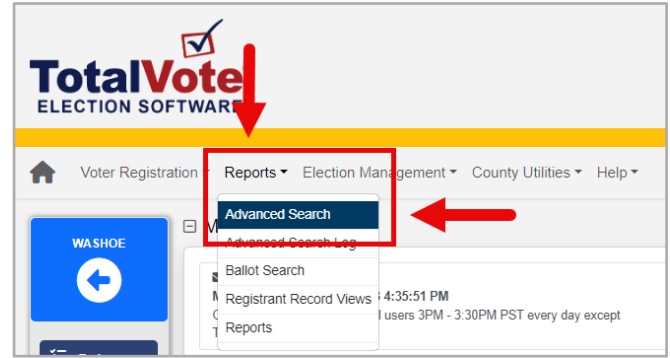
**Summary Bucket By Precinct:** Same as Summary Bucket Report (under Election Management reports) but done at a precinct level. This report has significantly more records in it.

## Report Builder – Creating a Report

Report Builder is used to build reports on voting, election ballot measures, and voting locale information.

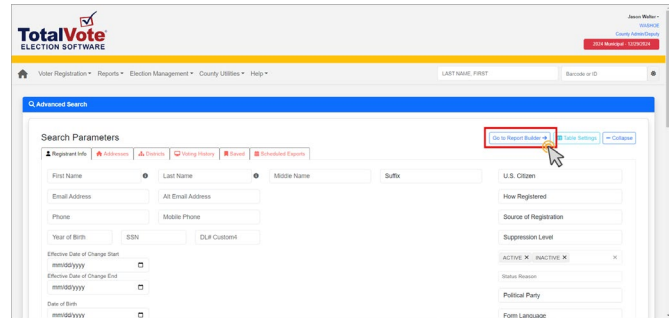
### From **Navigation Bar:**

- ▶ Select Reports > Advanced Search.



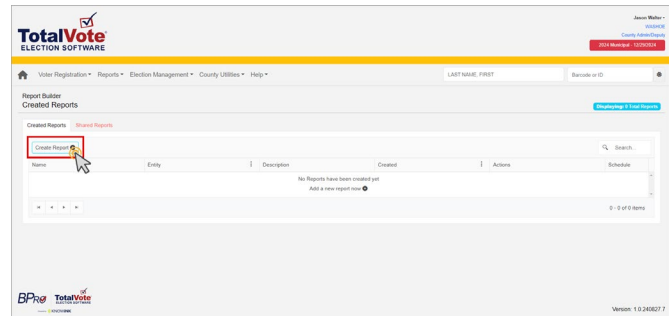
### From **Search Parameters:**

- ▶ Click [Go to Report Builder →].



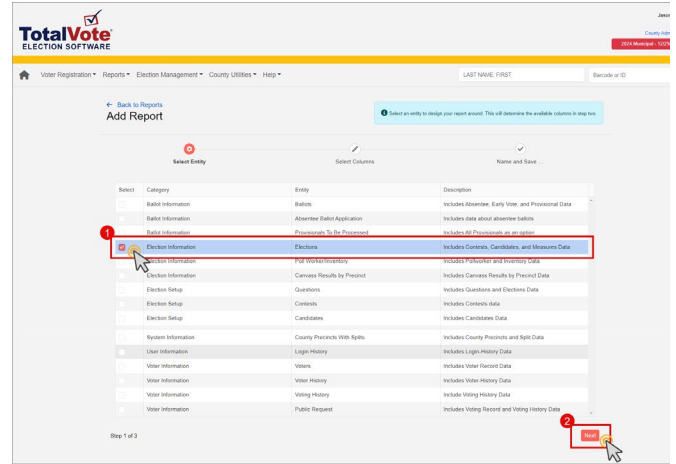
### From **Created Reports tab:**

- ▶ Click [Create Report +].



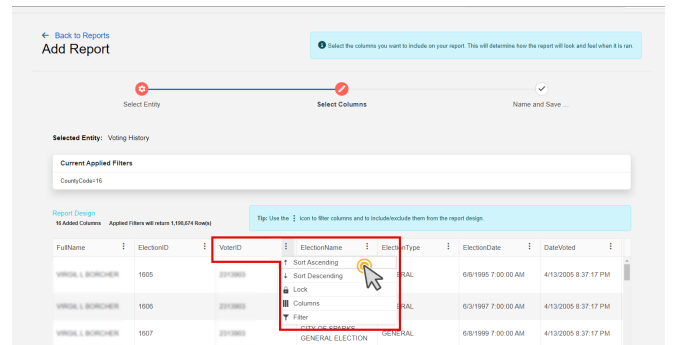
From **Add Report** screen:

- ▶ Select **Entity** to include as reference data.
- ▶ **Tick checkbox** in source column next to desired entity.
- ▶ Click **[Next]**.



**Select Columns** screen displays previewing columns report can produce, and number of rows returned.

- ▶ Select **Columns**.
- ▶ Click **vertical ellipsis [ : ]** from a column header to sort, lock, add/remove column(s) and/or filter columns data.

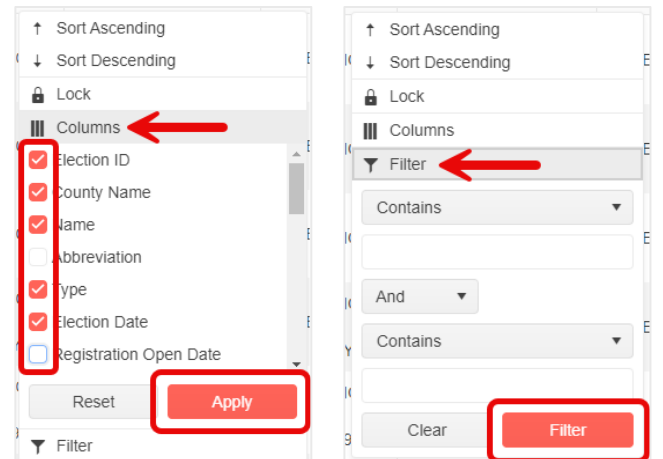


To add/remove column(s):

- ▶ Select **Columns** and tick/untick column(s) and click **[Apply]**.

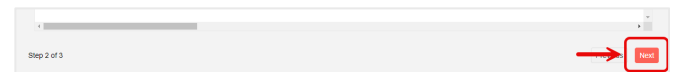
To filter column data:

- ▶ Select **Filter** and choose **filter type** and enter **data point** and click **[Filter]**.



Once all parameters have been entered:

- ▶ Click **[Next]**.

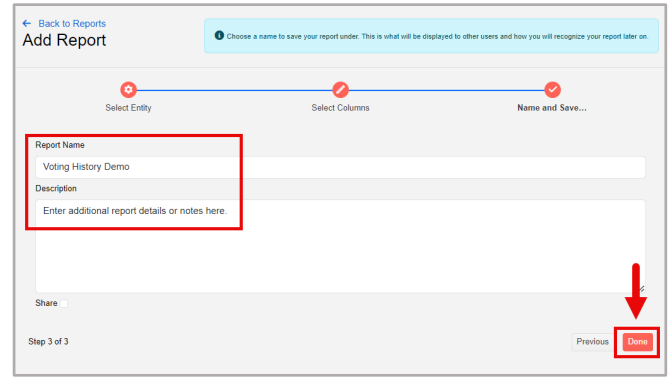


- ▶ Enter **Report Name** and **Description** identifying its intended purpose and data it contains.
- ▶ Click [Done].

Success notification will appear.

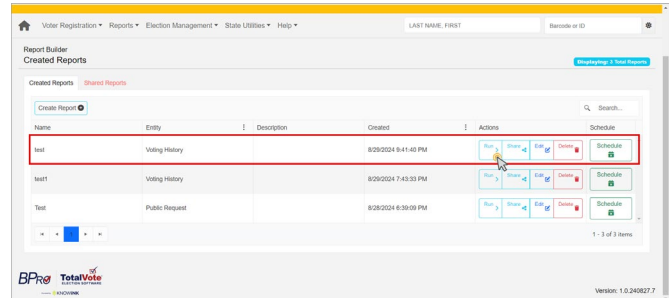
- ▶ Click [OK].

**NOTE:** Report will be saved and can be ran again in the future as well as be available for other users to run at any time. The Name and Description of the report will be valuable information for users to find, understand its purpose, and know its data set.



From the Created Reports tab:

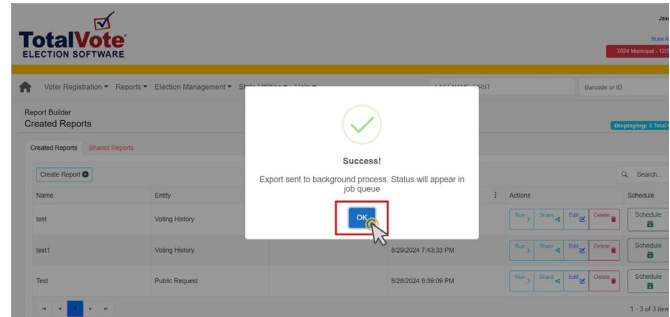
- ▶ Locate created report.
- ▶ Click [Run] under Actions.



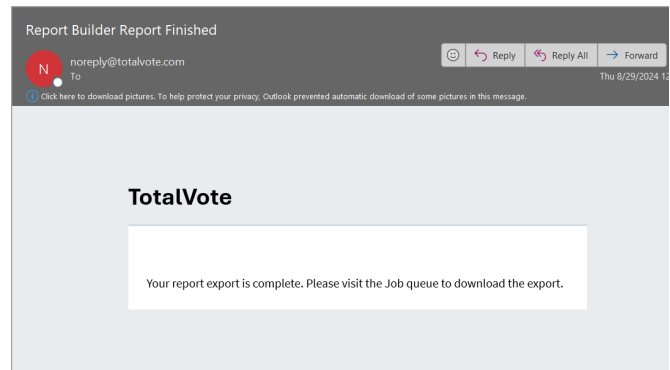
Success notification will appear.

- ▶ Click [OK].

Report will export in background and can be viewed in **Job Queue** when complete.



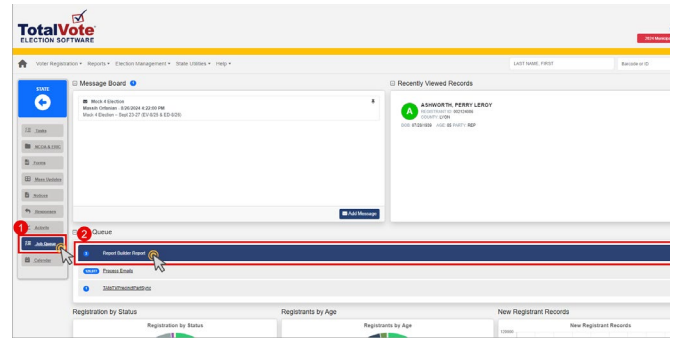
When report is ready to be viewed, TotalVote will send user an **email notification**.



## Navigate to TotalVote landing page.

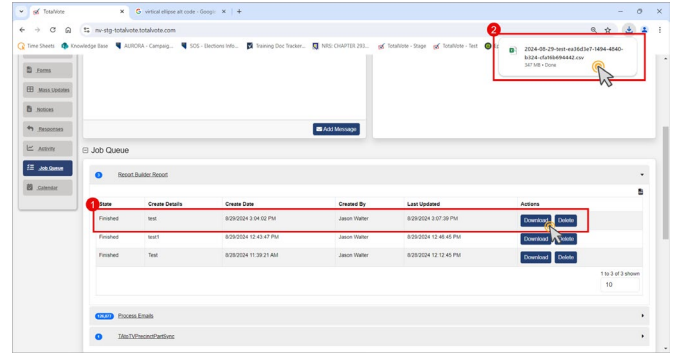
1. Select **[Job Queue]** from side task bar.

- Select **[Report Builder Report]** from Job Queue.

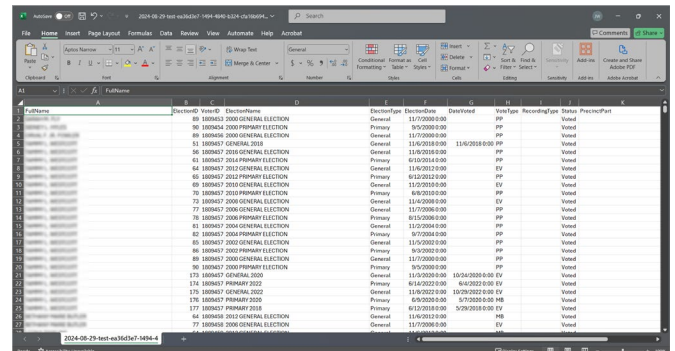


## Locate **Finished** report.

- Click **[Download]**.
- Open CSV from web browser downloads queue or computers downloads file explorer.



## Report will be viewable in CSV/Excel.

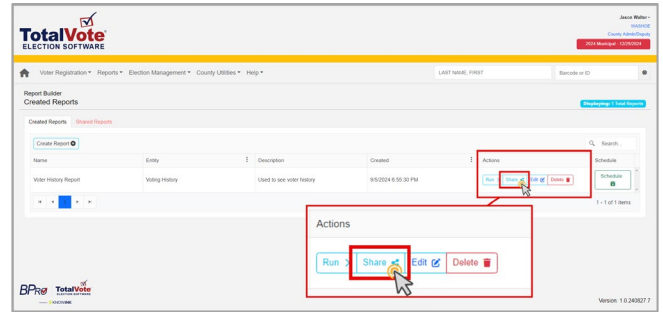


## Share, Edit, Delete and Schedule Created Reports

Share a created report with other users in same county.

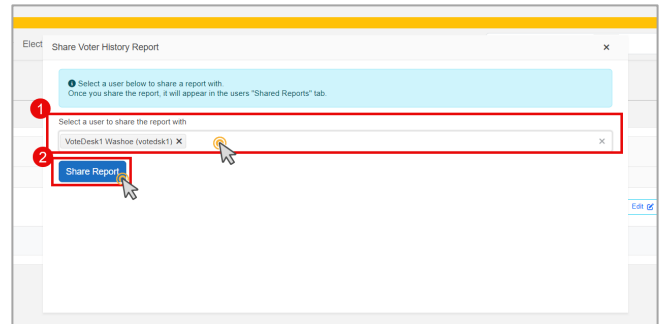
From Report Builders Created Report Tab:

- ▶ Click **[Share]** under Actions.



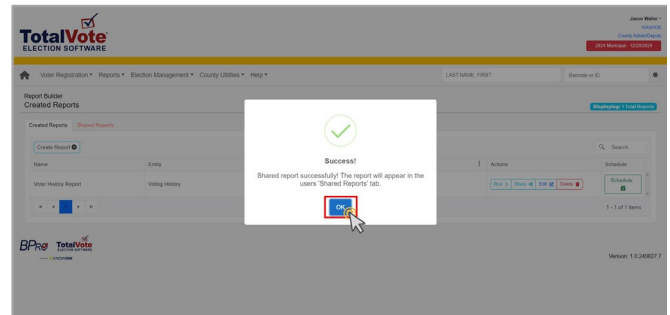
Share Report dialogue box will display.

- Select **individual user(s)** from dropdown menu **OR** Tick **Select All** checkbox to share report with all users in county.
- Click [Share Report].

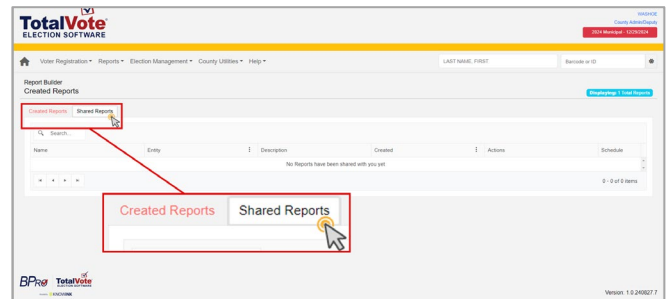


Success notification will display.

- ▶ Click **[OK]**.



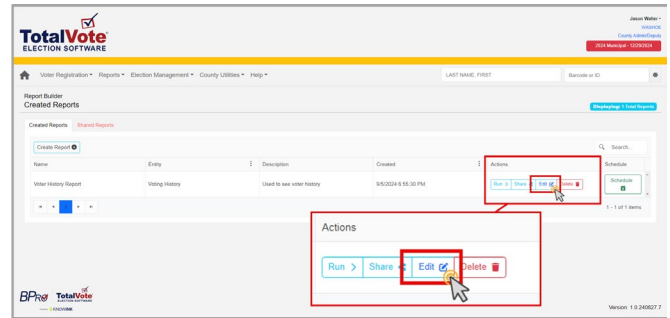
Created report can now be ran by user(s) who report was shared with. Shared reports can be found under **Shared Reports** tab.



## Edit a created report.

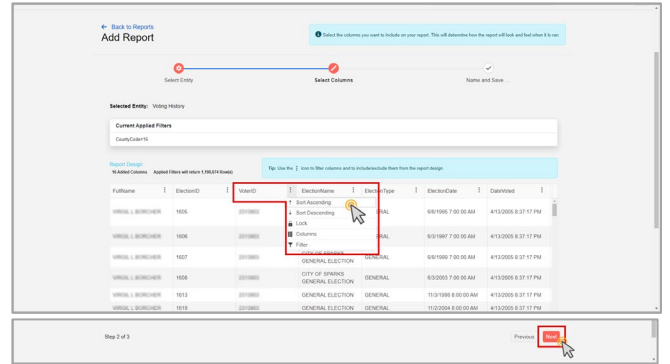
From Report Builder **Created Reports** tab:

- ▶ Click **[Edit]** under Actions.

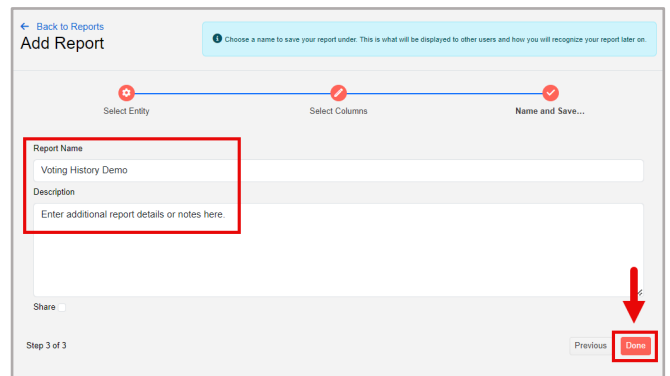


**Report** will open in Select Column page.

- ▶ Edit columns and filters.
- ▶ Click **vertical ellipsis [ : ]** from a column header to sort, lock, add/remove column(s) and/or filter columns data.
- ▶ Click **[Next]** when edits are complete.



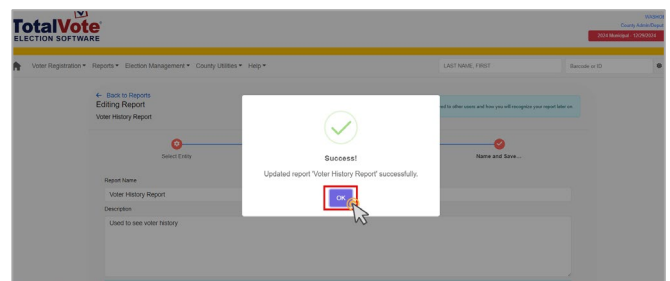
- ▶ **Update** Report Name and Description if needed.
- ▶ Click **[Done]**.



**Success** notification will appear.

- ▶ Click **[OK]**.

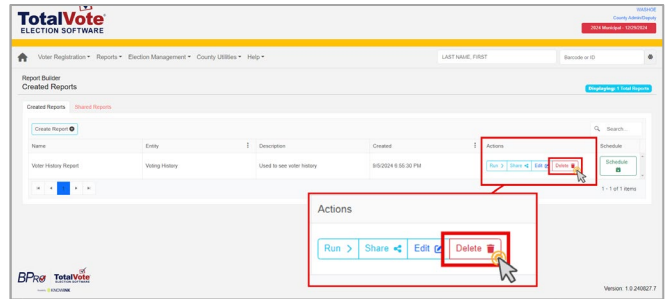
Report has been successfully updated with new edits and can be ran by user and shared users.



## Delete a created report.

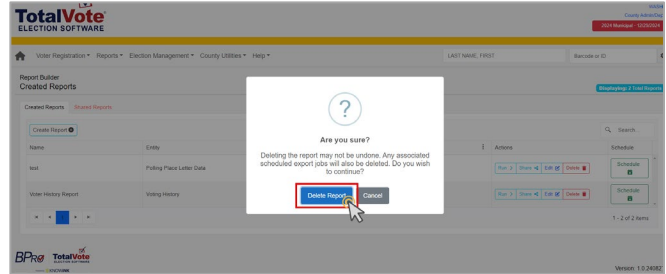
From Report Builder Created Reports tab:

- ▶ Click **[Delete]** under Actions.



**Are You Sure** notification will appear.

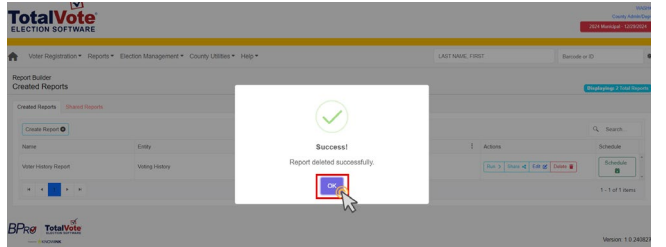
- ▶ Click **[Delete Report]**.



**Success** notification will appear.

- ▶ Click **[OK]**.

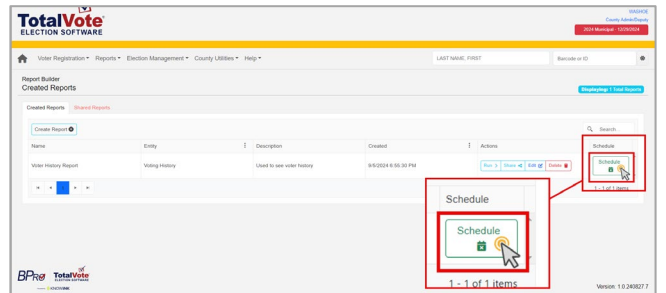
Report is removed from Created Reports tab as well as from any user who report was shared with.



## Schedule a created report and shared report to run automatically on a daily, weekly, monthly or yearly basis.

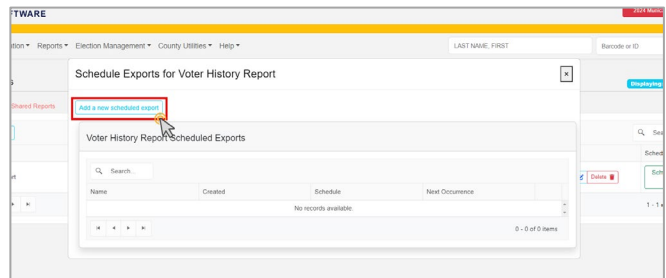
From Report Builder Created Reports tab or Shared Reports tab:

- ▶ Click **[Schedule]** under Schedule.



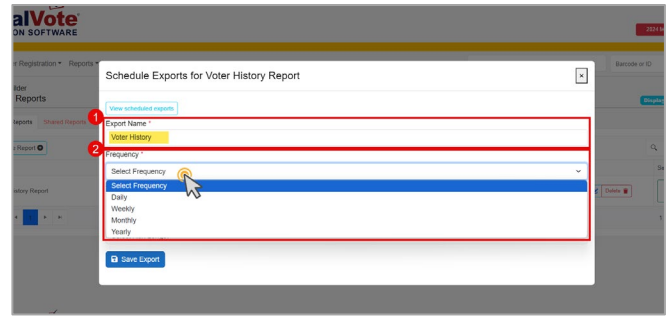
**Schedule Exports for...** dialog box will display.

- ▶ Click **[Add a new scheduled export]**.

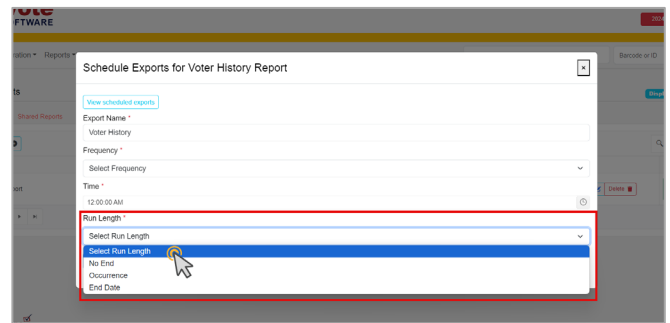




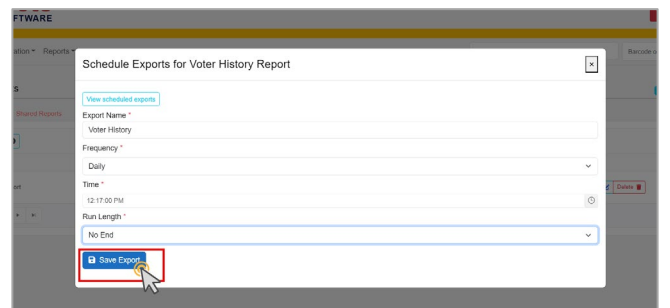
- ▶ **Enter** a name of export in **Export Name\*** text field.
- ▶ Choose frequency from **Frequency\*** dropdown menu.
  - Daily** – Choose time of day only
  - Weekly** – Choose day of week & time
  - Monthly** – Choose day of month & time
  - Yearly** – Choose month, day & time



- ▶ Choose **Run Length\*** from dropdown menu:
  - No End** – Will run continually until manually stopped/deleted
  - Occurrence** – Set number of times search will run i.e. 3 times, 8 times, etc. before stopping
  - End Date** – Set a date in future when search is to stop running

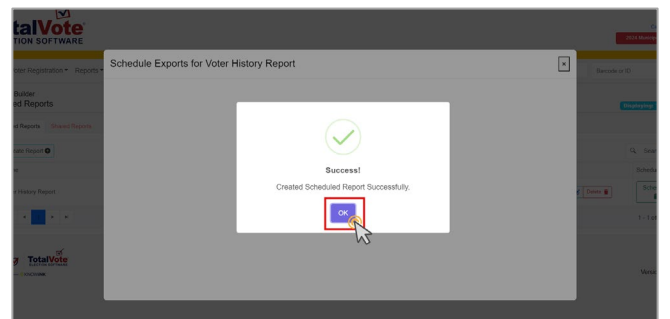


- ▶ Click [Save Export].



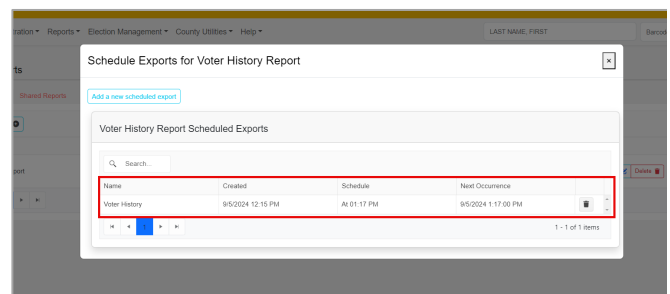
Success dialogue box will display.

- ▶ Click [OK].

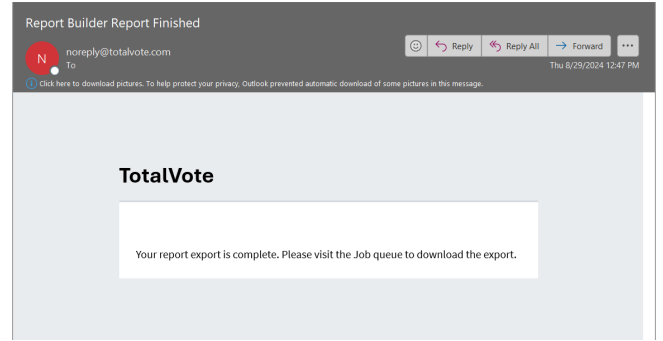


Scheduled export will be shown under **Reports Scheduled Exports**.

**NOTE:** Scheduled exports cannot be edited once created, only deleted. If changes need to be made to export schedule, delete scheduled export and start again. To delete a scheduled export, click the [Trash] icon.

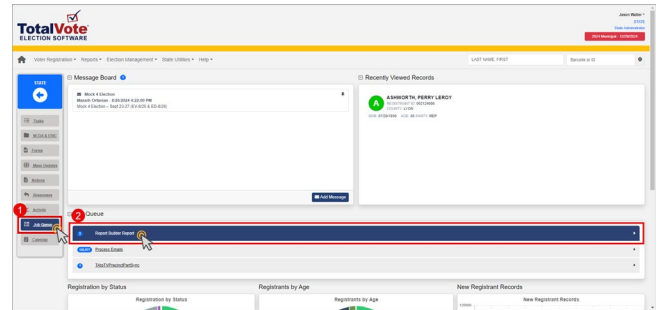


When scheduled export runs at designated time, TotalVote will send user an **email notification** when export is ready to view.



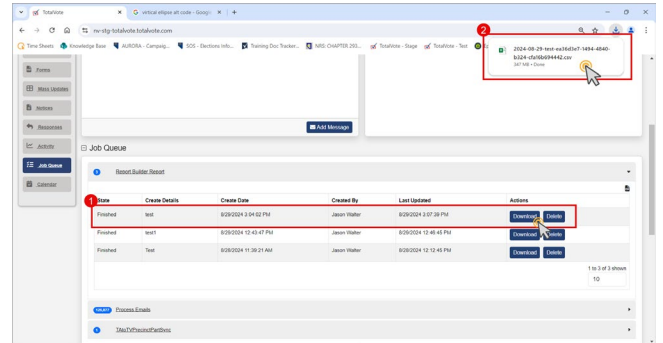
**Navigate** to TotalVote landing page.

- Select **[Job Queue]** from side task bar.
- Select **[Report Builder Report]** from Job Queue.



Locate **Finished** report.

- Click **[Download]**.
- Open CSV from web browser downloads queue or computers downloads file explorer.




## Electronic Register Testing / Poll Pad Certification in ePulse

In ePulse, **assign two Poll Pads** to each active Vote Center.

Vote Center \_\_\_\_\_  
**Poll Pad #1** \_\_\_\_\_  
**Poll Pad #2** \_\_\_\_\_  
 Early Voting  Election Day   
 Test Date/Time \_\_\_\_\_  
 Tester Name \_\_\_\_\_  
 Signature \_\_\_\_\_

Test the Following on **Poll Pad #1**

<p>1.1</p> <p><input type="checkbox"/> Pass</p> <p><input type="checkbox"/> Fail</p>	<p>a. <input type="checkbox"/> Launch the Poll Pad application and click <b>[GET STARTED]</b>.</p> <p>b. <input type="checkbox"/> Enter the Operator Election Officer Username and Password.</p> <p>c. <input type="checkbox"/> Select <b>[SIGN IN]</b>.</p> <p>d. <input type="checkbox"/> Select <b>SCAN BARCODE</b>.</p> <p>e. <input type="checkbox"/> Scan Driver License or Ballot barcode.</p> <p>f. <input type="checkbox"/> Verify voter record or <b>No Records Found</b>.</p>
<p>1.2</p> <p><input type="checkbox"/> Pass</p> <p><input type="checkbox"/> Fail</p>	<p>a. <input type="checkbox"/> Select <b>[START OVER]</b>.</p> <p>b. <input type="checkbox"/> Select <b>[MANUAL ENTRY]</b>.</p> <p>c. <input type="checkbox"/> Select <b>[ADVANCED OPTIONS]</b>.</p> <p>d. <input type="checkbox"/> Select the <b>STATUS</b> option.</p> <p>e. <input type="checkbox"/> From the <b>STATUS</b> dropdown list, select <b>Active</b>.</p> <p>f. <input type="checkbox"/> Select <b>[Search]</b>.</p> <p>g. <input type="checkbox"/> Click  gear symbol on left of a voter.</p> <p>h. <input type="checkbox"/> Enter the <b>Advanced Functions</b> password.</p> <p>i. <input type="checkbox"/> Verify <b>[REPRINT VOTER RECEIPTS]</b> button.</p> <p>j. <input type="checkbox"/> Click <b>X</b> to the right of voter name.</p> <p>k. <input type="checkbox"/> Launch the check-in process by selecting the voter.</p> <p>l. <input type="checkbox"/> On the WARNING screen, select <b>[ACCEPT]</b>.</p> <p>m. <input type="checkbox"/> On the <b>Is this you and is your information correct?</b> screen, select <b>[YES THIS IS ME BUT MY INFORMATION IS INCORRECT]</b>.</p> <p>n. <input type="checkbox"/> Select <b>[CONTINUE]</b>.</p> <p>o. <input type="checkbox"/> On the <b>Voter Update</b> screen, select <b>[Next]</b>.</p> <p>p. <input type="checkbox"/> Remove part of the street name on the <b>Voter Address</b> screen. Click <b>[Next]</b>.</p> <p>q. <input type="checkbox"/> Select a precinct and split on the Jurisdiction Details screen.</p> <p>r. <input type="checkbox"/> Enter the new Add voter Jurisdiction Screen password, if applicable.</p> <p>s. <input type="checkbox"/> Exit the process.</p>
<p>1.3</p> <p><input type="checkbox"/> Pass</p> <p><input type="checkbox"/> Fail</p>	<p>a. <input type="checkbox"/> Select <b>MENU</b> and select <b>Tools &amp; Settings</b>.</p> <p>b. <input type="checkbox"/> Enter the MENU password.</p> <p>c. <input type="checkbox"/> Select MENU and select <b>[Exit Application]</b>, [Exit Application]</p> <p>d. <input type="checkbox"/> Enter the new Guided Access Mode Password.</p>

<p>2</p> <p><input type="checkbox"/> Pass</p> <p><input type="checkbox"/> Fail</p>	<p><b>Locate the TotalVote PrecinctBallotStylesFile download and print it. Use the list to ensure you check each Precinct Split.</b></p> <p>a. <input type="checkbox"/> Launch the Poll Pad application and select <b>[GET STARTED]</b>.</p> <p>b. <input type="checkbox"/> Enter the Operator Election Officer Username and Password.</p> <p>c. <input type="checkbox"/> Select <b>[MANUAL ENTRY]</b>.</p> <p>d. <input type="checkbox"/> Select <b>[ADVANCED OPTIONS]</b>.</p> <p>e. <input type="checkbox"/> Select the <b>STATUS</b> option.</p> <p>f. <input type="checkbox"/> From the <b>STATUS</b> dropdown list, select <b>Active</b>.</p> <p>g. <input type="checkbox"/> Select <b>PRECINCT CODE</b> option.</p> <p>h. <input type="checkbox"/> Select the <b>PRECINCT</b> and <b>SPLIT</b> from the dropdown lists.</p> <p>i. <input type="checkbox"/> Select <b>[Search]</b>.</p> <p>j. <input type="checkbox"/> If <b>No Records Found</b> is displayed, select <b>[OK]</b>; select the next <b>SPLIT</b>.</p> <p>k. <input type="checkbox"/> Select an active voter and complete the check-in.  <b>Important:</b> Do NOT use the same voter for more than one Vote Center.</p> <p>l. <input type="checkbox"/> To encode ballot on a voter card, select <b>[CREATE CARD]</b>.</p> <p>m. <input type="checkbox"/> Note <b>Processed Successfully</b> message.</p> <p>n. <input type="checkbox"/> Verify the receipt.</p> <p>o. <input type="checkbox"/> Verify on a Ballot Marking Device that the card is accepted, and the correct ballot is displayed.</p> <p>p. <input type="checkbox"/> Repeat with a voter from <b>each precinct</b> in the printed list.</p> <p><b>NOTE:</b> The PRECINCT dropdown list shows only 30 items. If a specific precinct number is not listed, type the first character of that precinct to refresh the list.</p>
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<p>2</p> <p><input type="checkbox"/> Pass</p> <p><input type="checkbox"/> Fail</p>	<p><b>Locate the TotalVote PrecinctBallotStylesFile download and print it. Use the list to ensure you check each Precinct Split.</b></p> <p>q. <input type="checkbox"/> Launch the Poll Pad application and select <b>[GET STARTED]</b>.</p> <p>r. <input type="checkbox"/> Enter the Operator Election Officer Username and Password.</p> <p>s. <input type="checkbox"/> Select <b>[MANUAL ENTRY]</b>.</p> <p>t. <input type="checkbox"/> Select <b>[ADVANCED OPTIONS]</b>.</p> <p>u. <input type="checkbox"/> Select the <b>STATUS</b> option.</p> <p>v. <input type="checkbox"/> From the <b>STATUS</b> dropdown list, select <b>Active</b>.</p> <p>w. <input type="checkbox"/> Select <b>PRECINCT CODE</b> option.</p> <p>x. <input type="checkbox"/> Select the <b>PRECINCT</b> and <b>SPLIT</b> from the dropdown lists.</p> <p>y. <input type="checkbox"/> Select <b>[Search]</b>.</p> <p>z. <input type="checkbox"/> If <b>No Records Found</b> is displayed, select <b>[OK]</b>; select the next <b>SPLIT</b>.</p> <p>aa. <input type="checkbox"/> Select an active voter and complete the check-in.</p> <p><b>Important:</b> Do NOT use the same voter for more than one Vote Center.</p> <p>bb. <input type="checkbox"/> To encode ballot on a voter card, select <b>[CREATE CARD]</b>.</p> <p>cc. <input type="checkbox"/> Note <b>Processed Successfully</b> message.</p> <p>dd. <input type="checkbox"/> Verify the receipt.</p> <p>ee. <input type="checkbox"/> Verify on a Ballot Marking Device that the card is accepted, and the correct ballot is displayed.</p> <p>ff. <input type="checkbox"/> Repeat with a voter from <b>each precinct</b> in the printed list.</p> <p><b>NOTE:</b> The PRECINCT dropdown list shows only 30 items. If a specific precinct number is not listed, type the first character of that precinct to refresh the list.</p>
--	---

Validate Status Updates from **Poll Pad #1** on **Poll Pad #2**

<p>3.0</p> <p><input type="checkbox"/> Pass</p> <p><input type="checkbox"/> Fail</p>	<p><b>Verify key check-in workflows.</b></p> <p>On <b>Poll Pad #1</b>:</p> <p>a. <input type="checkbox"/> Launch the Poll Pad application and select <b>[GET STARTED]</b>.</p> <p>b. <input type="checkbox"/> Enter the Operator Election Officer Username and Password.</p> <p>c. <input type="checkbox"/> Select <b>[SIGN IN]</b>.</p> <p>d. <input type="checkbox"/> Select <b>[MANUAL ENTRY]</b>.</p> <p>e. <input type="checkbox"/> Select <b>[ADVANCED OPTIONS]</b>.</p> <p>f. <input type="checkbox"/> Select the <b>STATUS</b> option.</p> <p>g. <input type="checkbox"/> From the <b>ABSENTEE STATUS</b> dropdown list, select <b>Voted</b>.</p> <p>h. <input type="checkbox"/> Select <b>[Search]</b>.</p> <p>i. <input type="checkbox"/> The expected result is <b>No Records Found</b>. If any voters are found, contact the Help Desk.</p>
<p>3.1</p>	<p>a. <input type="checkbox"/> Select <b>RESET</b> to clear the previous search criteria.</p> <p>b. <input type="checkbox"/> Select the <b>STATUS</b> option.</p>

<input type="checkbox"/> Pass <input type="checkbox"/> Fail	c. <input type="checkbox"/> From the <b>ABSENTEE STATUS</b> dropdown, select <b>Mail Ballot Voted</b> . d. <input type="checkbox"/> Select <b>[Search]</b> . e. <input type="checkbox"/> Select a voter from the list and verify the check-in process terminates as “Mail Ballot has been voted”.
3.2 <input type="checkbox"/> Pass <input type="checkbox"/> Fail	a. <input type="checkbox"/> Select <b>RESET</b> to clear the previous search criteria. b. <input type="checkbox"/> Select the <b>STATUS</b> option. c. <input type="checkbox"/> From the <b>STATUS</b> dropdown list, select <b>Active</b> . d. <input type="checkbox"/> From the <b>ABSENTEE STATUS</b> dropdown list, select <b>Mail Ballot Sent</b> . e. <input type="checkbox"/> Select <b>[Search]</b> . f. <input type="checkbox"/> Select a voter, take note of the voter’s name. g. <input type="checkbox"/> Verify <b>Surrender mail ballot or sign affirmation</b> screen is included in check-in workflow. h. <input type="checkbox"/> Check in voter all the way to encoding the ballot code on a card followed by the <b>Processed Successfully</b> message. i. <input type="checkbox"/> Verify the receipt. j. <input type="checkbox"/> On <b>Poll Pad #2</b> search for the same voter and verify that the voter’s status is updated to <b>Voted</b> .
3.3 <input type="checkbox"/> Pass <input type="checkbox"/> Fail	a. <input type="checkbox"/> On <b>Poll Pad #1</b> , select <b>[MANUAL ENTRY]</b> . b. <input type="checkbox"/> Search for the same voter again. c. <input type="checkbox"/> Click on the gear symbol to the left of the voter’s name. d. <input type="checkbox"/> Enter the <b>Advanced Functions</b> password. e. <input type="checkbox"/> Select <b>[CANCEL VOTER CHECKIN]</b> . f. <input type="checkbox"/> Enter Poll Worker Name, select a Reason, add text in the Type Details field, select <b>[NEXT]</b> . g. <input type="checkbox"/> Sign and select <b>[SUBMIT]</b> . h. <input type="checkbox"/> On <b>Poll Pad #2</b> search for the same voter; verify that the voter’s status is no longer <b>Voted</b> .
3.4 <input type="checkbox"/> Pass <input type="checkbox"/> Fail	a. <input type="checkbox"/> On the <b>Poll Pad #1</b> , select <b>[ADVANCED OPTIONS]</b> . b. <input type="checkbox"/> Select the <b>STATUS</b> option. c. <input type="checkbox"/> From the <b>STATUS</b> dropdown list, select <b>Inactive</b> . d. <input type="checkbox"/> Select <b>[Search]</b> . e. <input type="checkbox"/> Select a voter, take note of the voter’s name and start the check-in process. f. <input type="checkbox"/> On the <b>Is this you and is your information correct?</b> screen, select <b>[YES THIS IS ME BUT MY INFORMATION IS INCORRECT]</b> . g. <input type="checkbox"/> Select <b>[CONTINUE]</b> . h. <input type="checkbox"/> Change the voter’s Last Name, Party and Address. Ensure the address is validated. i. <input type="checkbox"/> Review the changes on the <b>Voter Update Confirmation Signature</b> page, including Precinct and Split.

	<ul style="list-style-type: none"> <li>j. <input type="checkbox"/> Complete the same day registration update.</li> <li>k. <input type="checkbox"/> If information is correct, select <b>[SUBMIT]</b>.</li> <li>l. <input type="checkbox"/> Select the voter again and verify that the voter now has the updated name, party and address information and check them in all the way to encoding the ballot code on a card followed by the <b>Processed Successfully</b> message.</li> <li>m. <input type="checkbox"/> Verify the receipt.</li> </ul>
3.5 <input type="checkbox"/> Pass <input type="checkbox"/> Fail	<ul style="list-style-type: none"> <li>a. <input type="checkbox"/> On <b>Poll Pad #1</b>, select <b>[MANUAL ENTRY]</b>.</li> <li>b. <input type="checkbox"/> Enter a random string in the <b>Last Name</b> search field.</li> <li>c. <input type="checkbox"/> Select <b>[Search]</b>.</li> <li>d. <input type="checkbox"/> A <b>No Records Found</b> message should appear, (if not, enter a different random string).</li> <li>e. <input type="checkbox"/> Click <b>[OK]</b>, select <b>[REGISTER]</b>.</li> <li>f. <input type="checkbox"/> Complete registration to add a new registrant.</li> <li>g. <input type="checkbox"/> To process the provisional ballot and encode ballot on a voter card, select <b>[CREATE CARD]</b>.</li> <li>h. <input type="checkbox"/> Note Processed Successfully message.</li> <li>i. <input type="checkbox"/> Verify the two identical PROVISIONAL receipts.</li> <li>j. <input type="checkbox"/> Verify on a Ballot Marking Device that the card is accepted, and the correct ballot is displayed.</li> <li>k. <input type="checkbox"/> On <b>Poll Pad #2</b> search for the newly registered voter name and verify the voter's status is updated to <b>Provisional</b></li> </ul>
3.6	<ul style="list-style-type: none"> <li>a. <input type="checkbox"/> Repeat Steps 3.0 through 3.5 for each Vote Center Poll Pad pair.</li> </ul>

In ePulse

4 <input type="checkbox"/> Pass <input type="checkbox"/> Fail	<b>Verify that updates made on Poll Pads were communicated to ePulse.</b> <ul style="list-style-type: none"> <li>a. <input type="checkbox"/> Verify that the Certification Election is selected.</li> <li>b. <input type="checkbox"/> Select <b>VOTERS</b> in the left navigation menu.</li> <li>c. <input type="checkbox"/> Verify that all the test added voters and tested voters with updated information are listed under <b>PROCESSED VOTERS</b>.</li> <li>d. <input type="checkbox"/> Verify that all test registered voters are listed under <b>ADDED VOTERS</b>.</li> <li>e. <input type="checkbox"/> Verify all tested voters with updated information are listed under <b>ADDRESS CHANGES</b> and <b>NAME CHANGES</b>.</li> </ul>
5 <input type="checkbox"/> Pass <input type="checkbox"/> Fail	<b>Verify that the updates made on the Poll Pads are available in reports</b> <ul style="list-style-type: none"> <li>a. <input type="checkbox"/> Select <b>REPORTING</b> in the left navigation menu.</li> <li>b. <input type="checkbox"/> Select <b>VELOCITY REPORT</b>.</li> <li>c. <input type="checkbox"/> Select the <b>Voter Check-in Details with Signatures</b> report.</li> <li>d. <input type="checkbox"/> Verify <b>ELECTION</b> toward top right of screen is <b>Certification Election</b>.</li> <li>e. <input type="checkbox"/> Verify the report lists the expected number of check-ins.</li> </ul>

## Generating and Uploading ePulse Files

Setting up an election requires actions in TotalVote, ePulse, and on Poll Pads. Election and voter information is exported from TotalVote and imported into ePulse, which is used to configure and manage Poll Pads.

Before generating ePulse files, the following TotalVote processes must be complete:

- Election set up
- Polling locations assigned
- Contests and Candidates set
- Ballot styles generated and proofed

This document covers how to generate ePulse voter, signature, polling place, precinct ballot styles, and address files in TotalVote and use those files to set up the election in ePulse and on Poll Pads. Each step is identified as a TotalVote, ePulse, or Poll Pad process.



# Generating ePulse Files in TotalVote

## Building an Election in ePulse

With signature and election files created and exported from TotalVote, the next step is to build the election in ePulse.

### Creating the Election

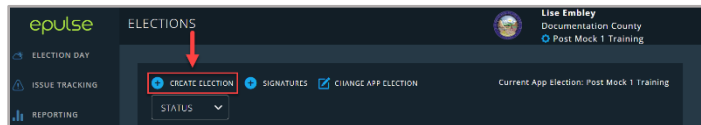
**epulse**

Return to the ePulse landing page and select **ELECTION SETUP > ELECTIONS**.



**epulse**

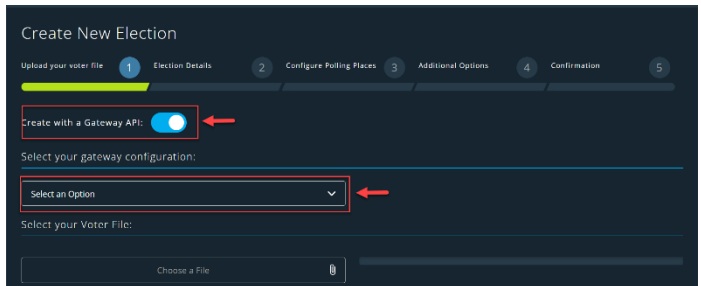
Click **Create Election**.



**epulse**

To allow information to flow between TotalVote and ePulse, ensure **Create with a Gateway API** is toggled **ON**.

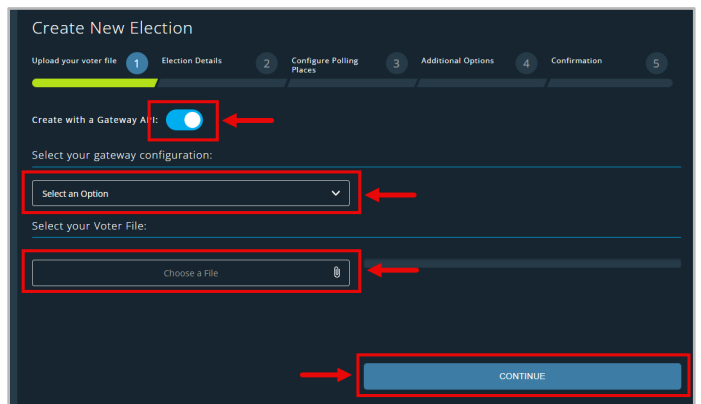
Click **Select an Option** and select `nevada-release.app.epulse.io`.



### Uploading the Voter File

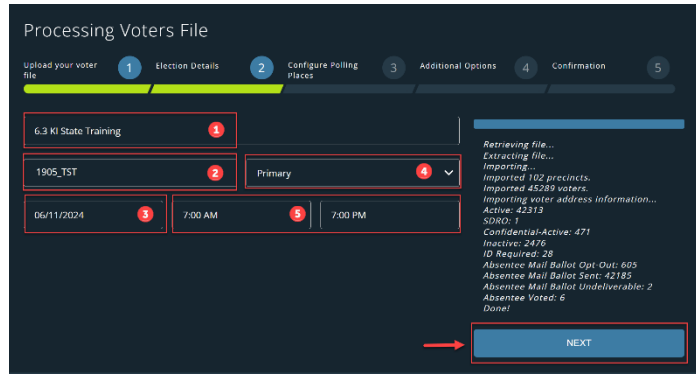
**epulse**

Click **Choose a File**, navigate to select the **VoterFile** downloaded from TotalVote, and click **[CONTINUE]**.

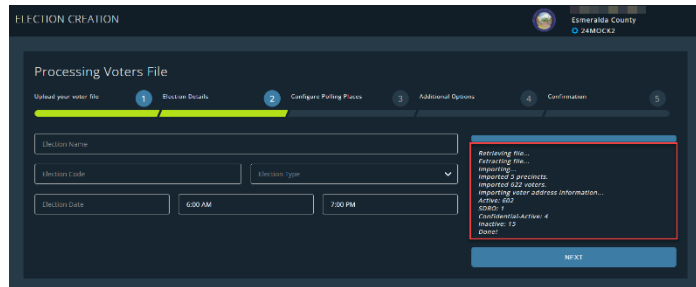


While the Voter File is processing, enter the election details:

- Election Name
- **Election Code**  
(election# + Environment, e.g., 1905\_TST)
- Election Date
- Election Type
  - ▶ **General** (no party logic)
  - ▶ **Primary** (party logic)
- **Polls Open/Close Hours**  
(7:00 am/7:00 pm [NRS 293.273](#))



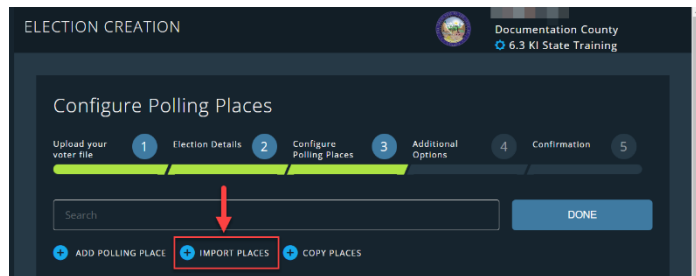
Review the Voter File import to confirm the number of precincts and voters is accurate and uploaded without errors. When the import is complete, the system displays **Done!** Click **[NEXT]**.



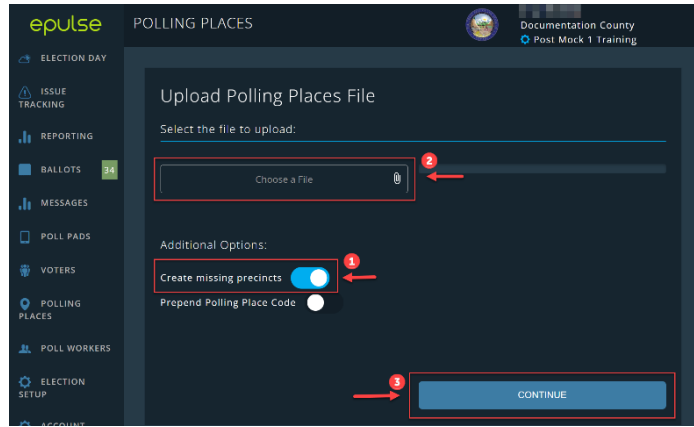
## Uploading the Polling Places File

While Polling places are unlikely to change significantly between elections, all polling place information in ePulse is election specific. A new polling place file is generated in TotalVote and uploaded to ePulse for each election. This ensures the most current information is always available on Poll Pads.

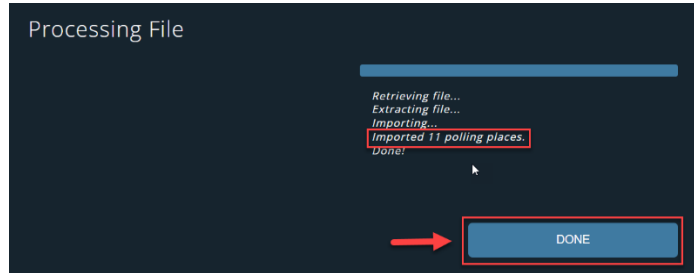
On the Configure Polling Places screen, select **Import Places**.



- Ensure **Create missing precincts** toggle is selected/ON.
- Navigate to the downloaded **PollingPlacesFile** and double click to select it.
- Click [CONTINUE].

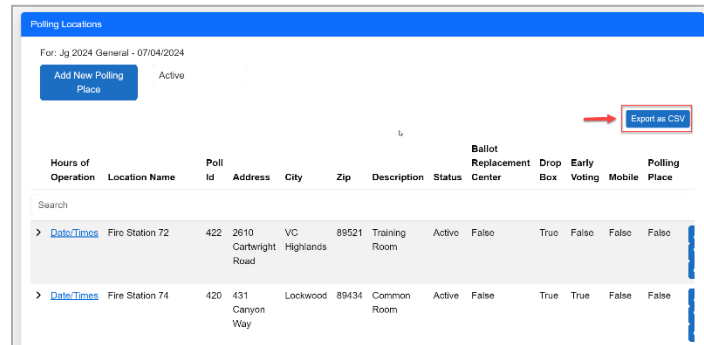


Note the number of polling places imported and click [DONE].



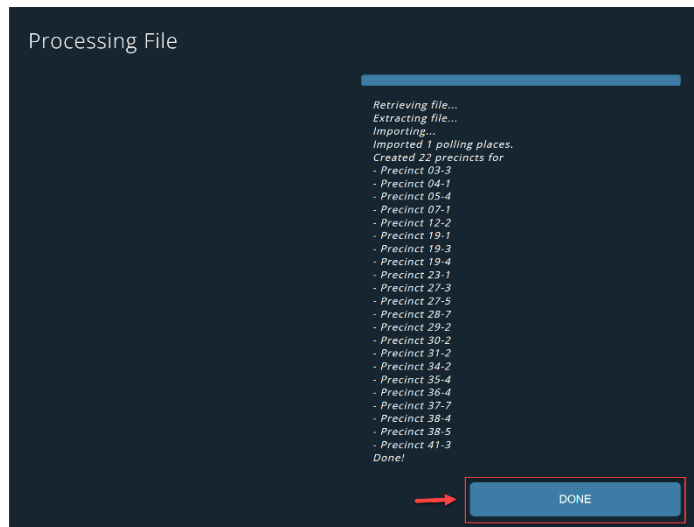
To compare the list of polling places imported in ePulse against the list of active polling places in TotalVote, log in to TotalVote. Select **Election Management > Polling Locations > Add/Edit Poll Locations** and click [Export as CSV].

Polling Places imported into ePulse should match active Vote Centers in TotalVote.




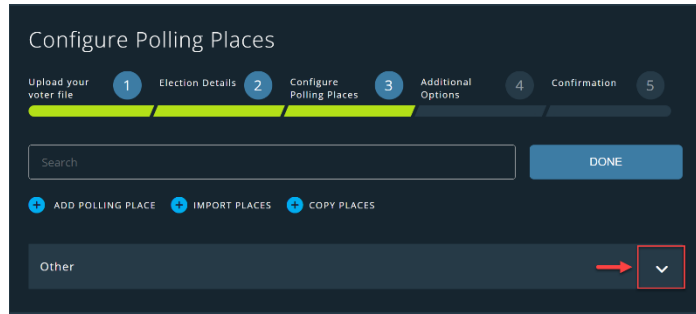
Review the extraction process to verify that all expected precincts were created.

When the system displays **Done!**, the import is complete. Click [DONE].

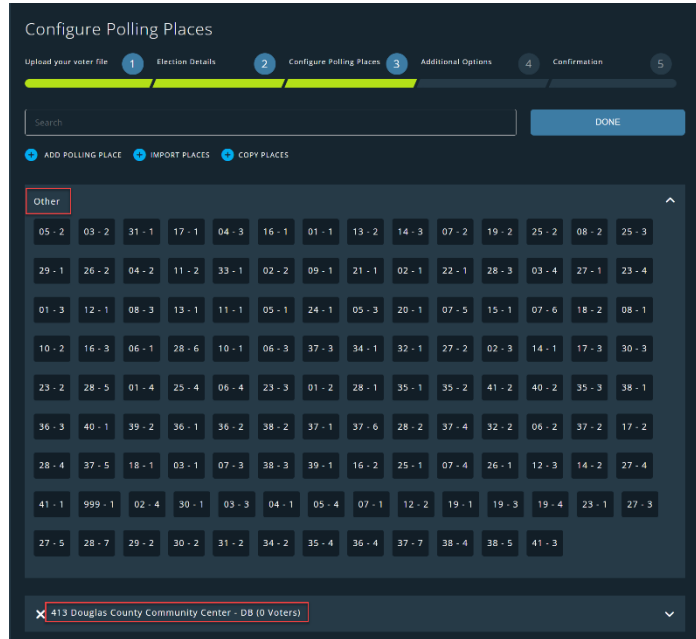




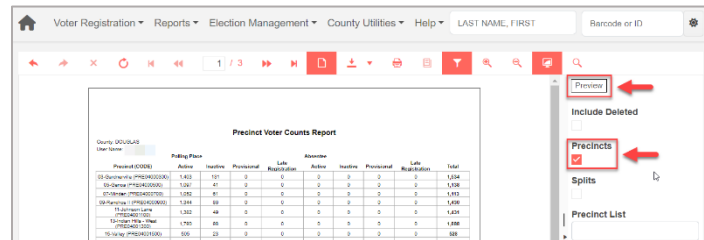
The **Configure Polling Places** screen is displayed. Click the **Other** settings  down arrow to open the list of precincts.



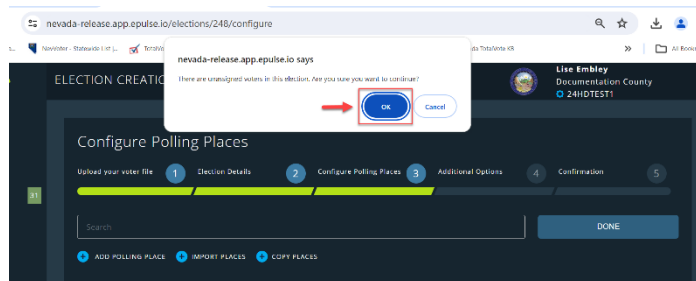
Confirm that all precincts are listed under **Other** and click **[DONE]**. **Note:** Nevada's Vote Centers make it possible for any voter to vote at any vote center in the county. Voters are not assigned to specific polling places and polling places are not assigned to precincts.



To compare the list of precincts in TotalVote, log in to TotalVote. Select **Reports > Reports** and select **District Precinct Split Voters Counts**. The report will be blank initially. Select **Precincts** and click **[Preview]**.



The warning message **unassigned voter** appears. This is as expected because Nevada voters are not assigned to specific polling places. Click **[OK]**.



## Importing Street Rules

When a Same Day Registrant enters their home address on a Poll Pad, ePulse validates the address against street rules – a database of known valid street addresses exported from TotalVote.

A new Address File is created each time ePulse files are generated in TotalVote. Uploading the new address file is part of the process each time an election is created in ePulse.

epulse

Set **TRANSFER POLL PADS** to **NONE**.

Ensure the **UPDATE APP ELECTION** toggle is selected/**ON**.

Click **IMPORT ADDITIONAL STREET RULES**.

Additional Options

Upload your voter file 1 Election Details 2 Configure Polling Places 3 Additional Options 4 Confirmation 5

IMPORT STREET RULES

IMPORT ADDITIONAL STREET RULES 1

STREET RULES: 26305

TRANSFER POLL PADS 0

NONE 1

UPDATE APP ELECTION 0

Update App Election 2

DONE

epulse

Navigate to select the downloaded **AddressFile**, and double click to open it.

ADDRESS IMPORT

Upload Address Import File

Select the file to upload:

Choose a file

CONTINUE

epulse

The address file name is displayed.  
Click **[CONTINUE]**.

Upload Address Import File

Select the file to upload:

2017DemoAddressRules(MO)V4.txt

CONTINUE

epulse

ePulse imports the file and displays a transaction history. Confirm that the expected number of address rules imported. When the process is complete, click **[DONE]**.

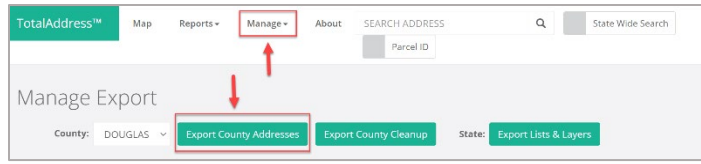
Processing File

Retrieving file...  
Extracting file...  
Importing...  
Removing old rules...  
Imported 26305 rules.  
Creating streets file...  
Done!

DONE

## TOTALVOTE

To compare against address data in TotalVote, log in to TotalVote. Select **County Utilities > TotalAddress**. Select **Manage > Export > [Export County Addresses]**.



## File Explorer

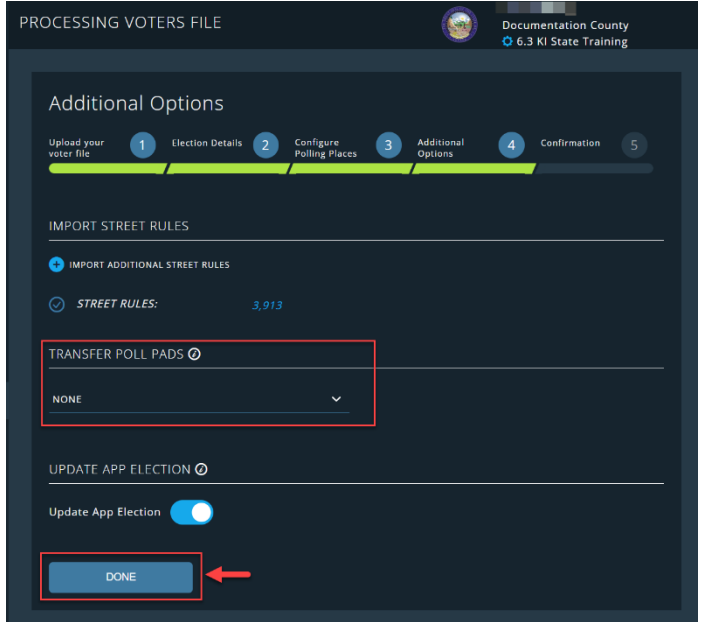
Open the file from the downloads folder and scroll to the last line of addresses. Compare the line number with the number of rules imported.

The screenshot shows an Excel spreadsheet with the following data:

OriginalAddress	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
3916 99 WILD H	99			WILD HOR DR			0 SPARKS	89437		32029		12	39.55248	-119.553		
3917 990 HAMIL	990			HAMILTON RD			0 RENO	89021		32029		05.00	39.38009	-119.664		
3918 990 S ST	990	S	E	ST			0 VIRGINIA CITY	89440		32029		02.00	39.29754	-119.654		
3919 991 S C ST	991	S	C	ST			0 VIRGINIA CITY	89440		32029		02.00	39.29793	-119.655		
3920 991 S D ST	991	S	D	ST			0 VIRGINIA CITY	89440		32029		02.00	39.29764	-119.654		
3921 993 S E ST	993	S	E	ST			0 VIRGINIA CITY	89440		32029		02.00	39.29743	-119.653		
3922 994 S C ST	994	S	C	ST			0 VIRGINIA CITY	89440		32029		02.00	39.29605	-119.655		
3923 996 S ST	996	S	E	ST			0 VIRGINIA CITY	89440		32029		02.00	39.29732	-119.654		
3924 999 BELGI	999	S		BELGIUM CT			0 SPARKS	89437		32029		12	39.55696	-119.541		

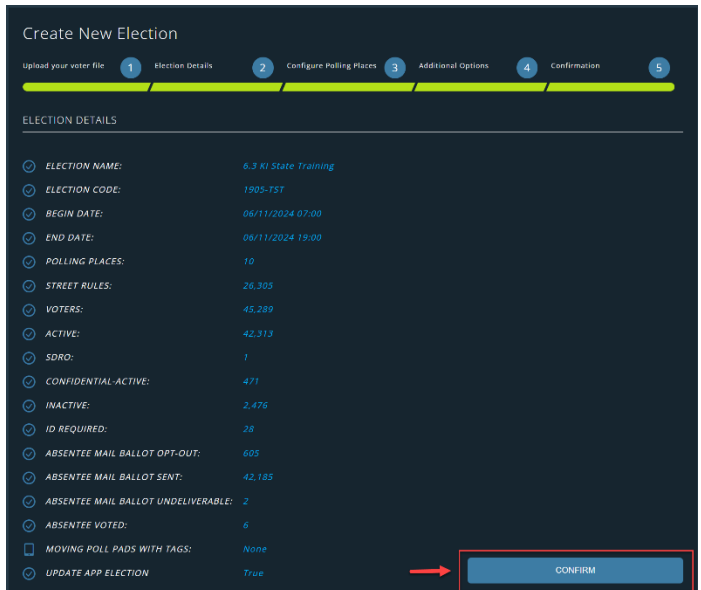
## epulse

When the Street Rules have finished processing, the Additional Options screen is displayed again. Set **TRANSFER POLL PADS** to **NONE**, scroll to the bottom and click **[DONE]**.



## epulse

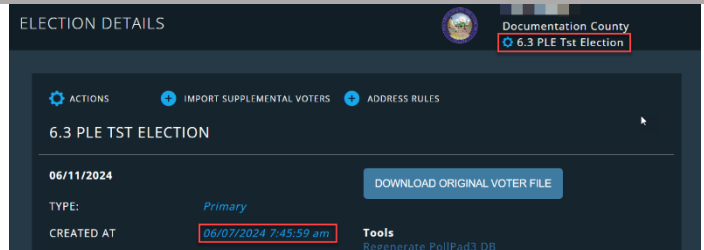
The Create New Election summary screen is displayed. Carefully review election details, comparing against TotalVote data. Click **[CONFIRM]** to save the newly created election. **Important:** If you navigate away from this screen without clicking **[CONFIRM]**, the election setup is not saved.



Throughout the setup of a new election, the upper right corner of the ePulse landing page displays the name of the last election.

After Election Details are confirmed on the Create New Election page, the name of the newly created election is displayed.

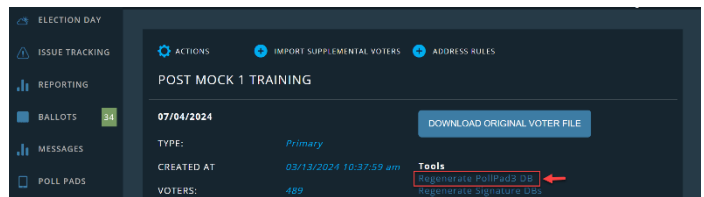
Note the election creation date and time.



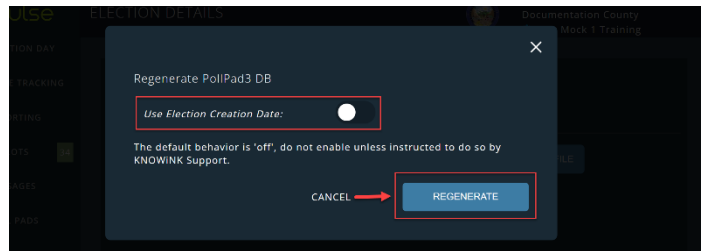
### Regenerating the Poll Pad Database

After the voter, polling place, and address files are imported to ePulse, regenerate the database to create the seed files for use on Poll Pads.

From the Election Details screen, select **Regenerate PollPad3 DB**.

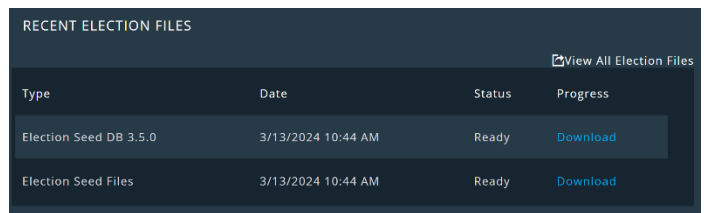


Ensure the **Use Election Creation Date** toggle is not selected/**OFF** and click **[REGENERATE]**.



Two "seed" files are listed under **RECENT ELECTION FILES**.

A progress bar is displayed for each file until the process is complete and progress bars are replaced by **Download** links.



## Uploading the Signature Files

The signature file is a zip file containing digital images of voter signatures. Depending on the size of the county, the initial download process can take hours or even days. Once downloaded, that signatureExport\_init file is imported into ePulse and used to regenerate a signature file for use on Poll Pads. After the close of voter registration prior to an election, additional signatures can be added to the database using an incremental process.

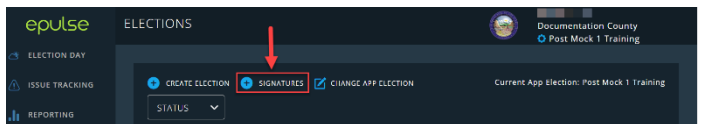
epulse

From the ePulse landing page, select **ELECTION SETUP > ELECTIONS**.



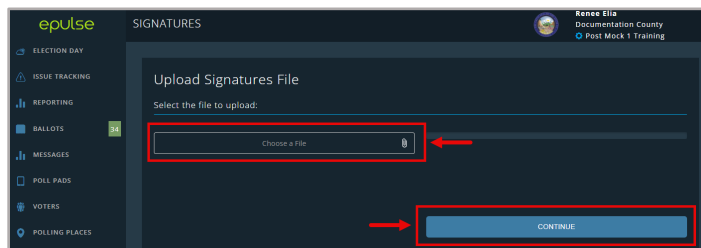
epulse

Click Signatures.



epulse

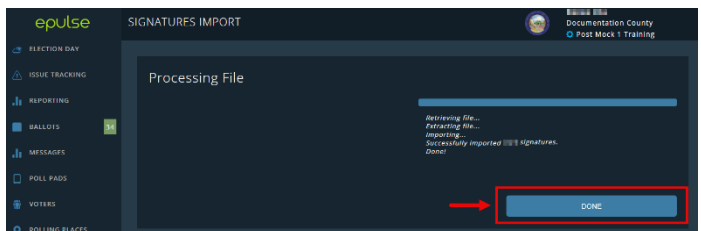
**[Choose a File]** and navigate to the most current signatureExport\_init file downloaded from TotalVote. Select the signature file and **[CONTINUE]**



epulse

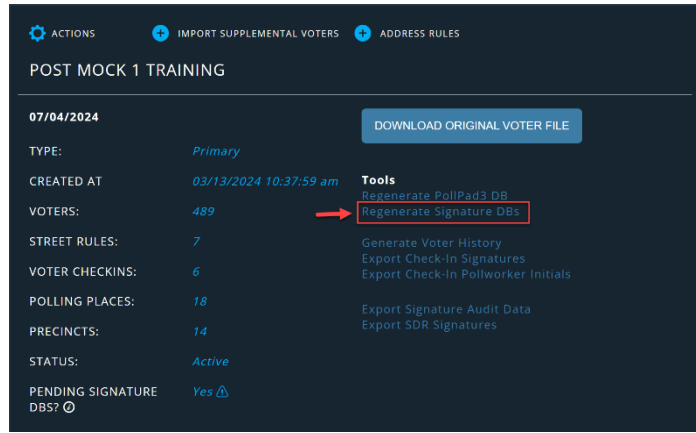
ePulse retrieves, extracts, and imports the signatures and displays Done! when complete. Confirm that the number of signatures imported is a sensible proportion to the number of registered voters (usually double or triple) and click **[DONE]**.

**Note:** Signatures for cancelled and inactive voters are included in the download.

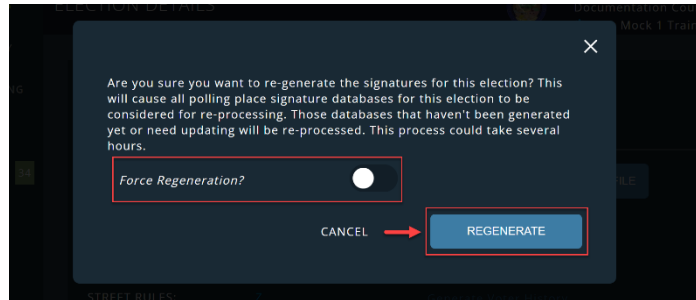




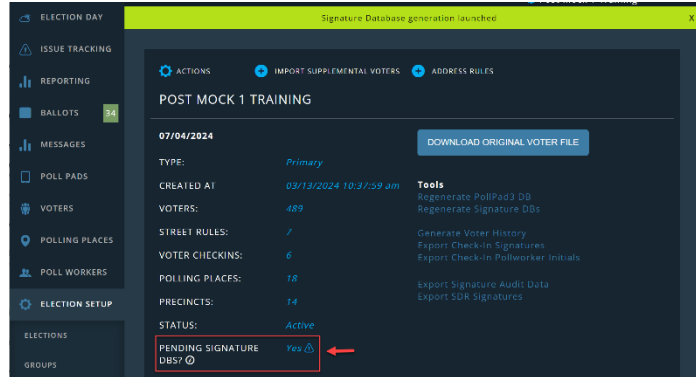
With details of the current election displayed, select **Regenerate Signature DBs**.  
Regenerating the Signature dB creates the download that displays signatures on Poll Pads.



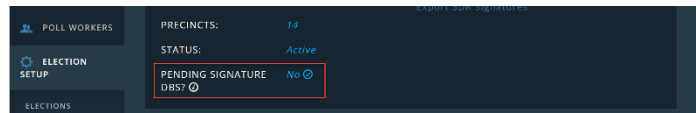
Ensure that **Force Regeneration** toggle is not selected/OFF and click **[REGENERATE]**.



A green **Signature Database generation launched** status bar is displayed across the top of the screen.  
**PENDING SIGNATURE DBS?** status will be **Yes** until the regeneration is complete. This can take a few minutes.



Refresh the page and **PENDING SIGNATURE DBS?** shows **No**.



## Connecting TotalVote and ePulse

The final step of election setup is activating the connection between ePulse and TotalVote.

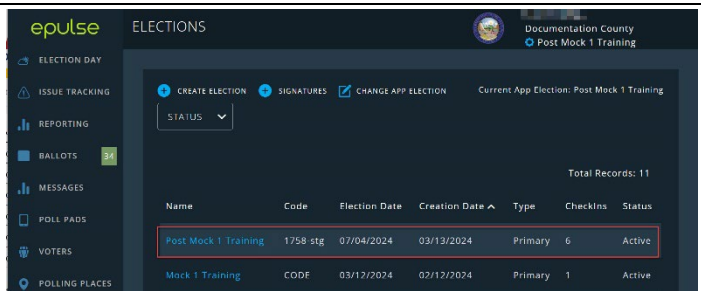
**epulse**

From the ePulse landing page, select **ELECTION SETUP > ELECTIONS**.



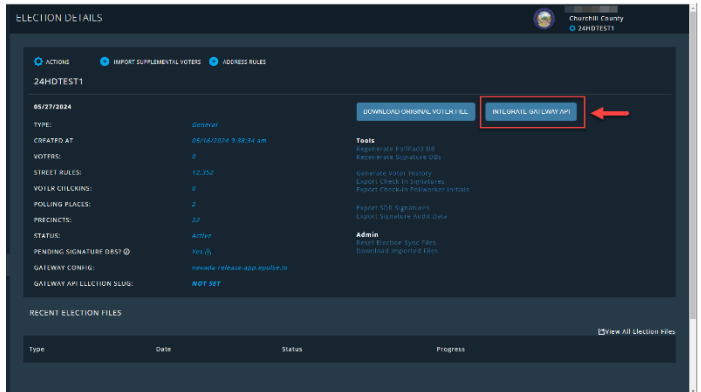
**epulse**

Select the **Election Name** link from the list.



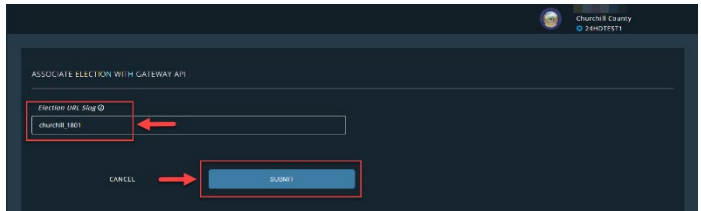
**epulse**

Select **[INTEGRATE GATEWAY API]**.



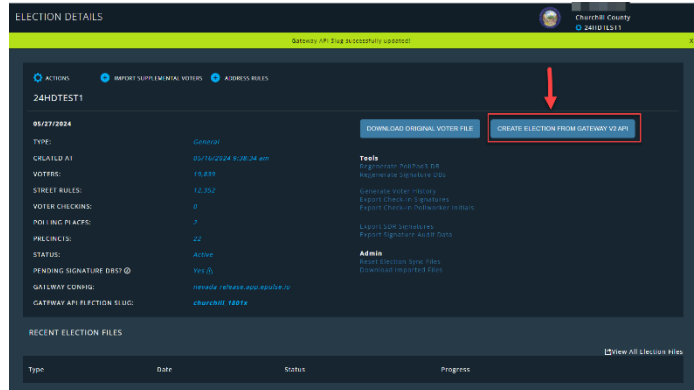
**epulse**

Enter the **Election URL Slug** established in TotalVote: **Countyname\_electionID** (e.g., "churchill\_1801") and click **[SUBMIT]**.



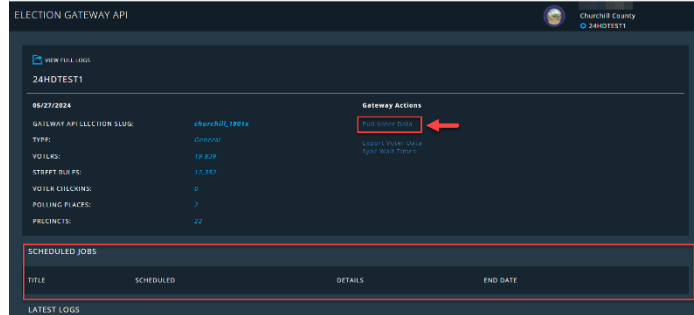


Click [**CREATE ELECTION GATEWAY API**] to initiate the process that continuously transfers voter data back and forth between Poll Pads, ePulse, and TotalVote.

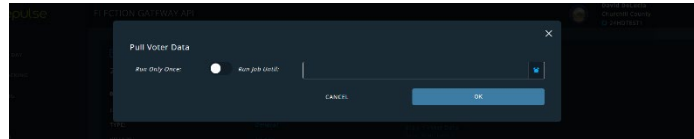


Under Gateway Actions, select Pull Voter Data.

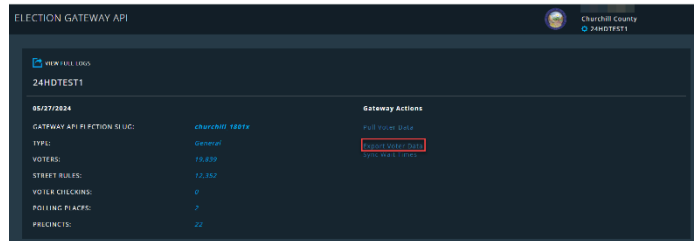
**Note:** If [**DOWNLOAD ORIGINAL VOTER FILE**] is displayed instead of **Gateway Actions**, contact the VREMS Help Desk.



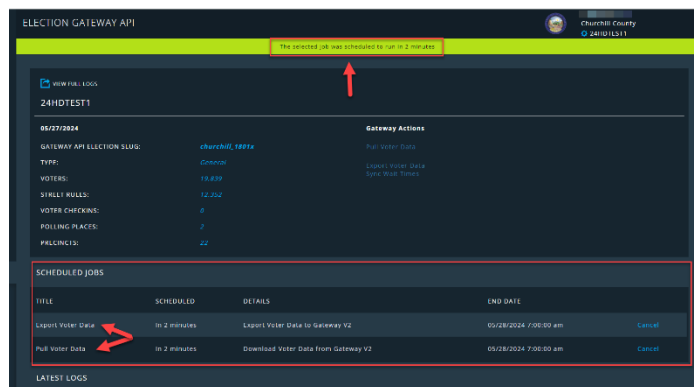
Leave **Run Job Until** blank, leave **Run Only Once** off/untoggled and click [OK].



Under Gateway Actions, select Export Voter Data.



Election setup is complete. Note that the **Export Voter Data** and **Pull Voter Data** process are now listed under **SCHEDULED JOBS**. Click the ePulse logo in the upper left corner of the screen to return to the ePulse landing page.

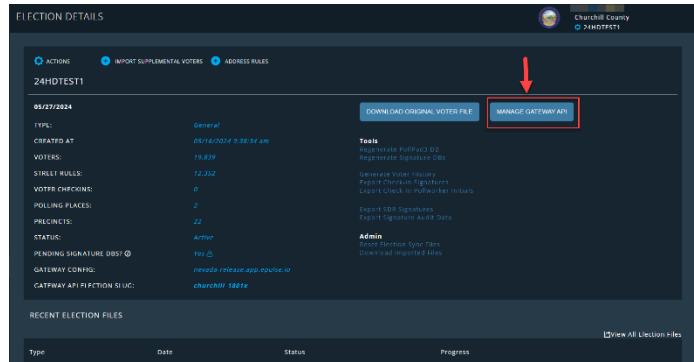




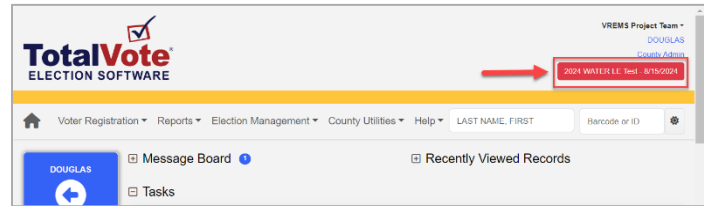
To review Gateway API settings, return to the ePulse landing page and select **ELECTION SETUP > ELECTIONS**. Click to select the current **Election Name** link.

After the API Gateway begins transferring data, the button shows **MANAGE GATEWAY API**.

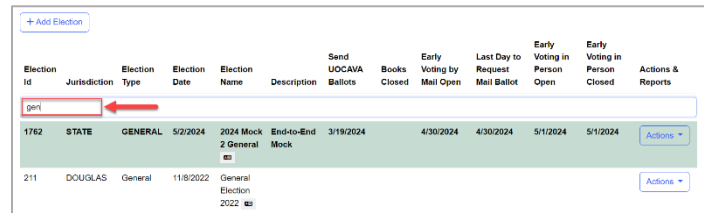
**Note:** Gateway API buttons are only visible when the election is created with a Gateway API and gateway configuration.



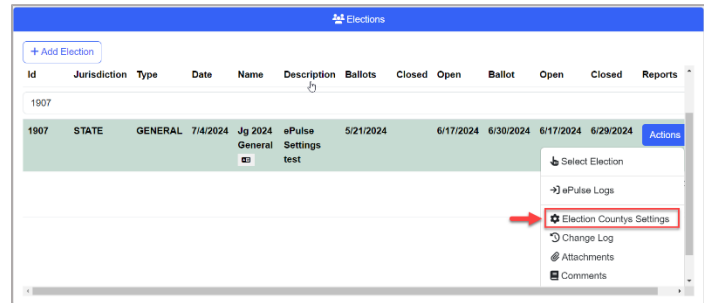
From the TotalVote Navigation bar, select **Election Management > Elections**.



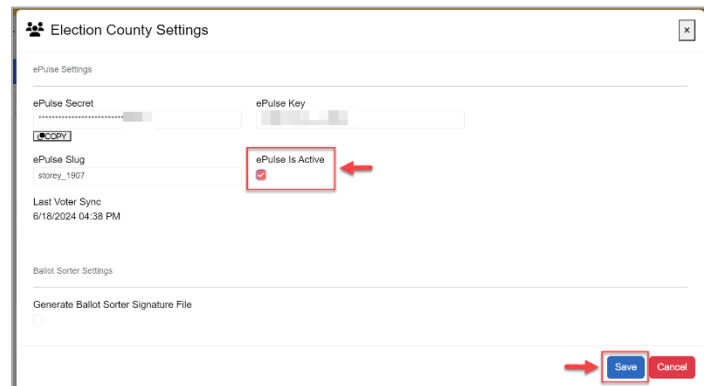
Locate the highlighted election in the list. It may not be on the first page. To search, begin entering the election ID number, date, or name in the search bar. The list of options narrows to match the criteria entered.



Open the **[Actions6]** dropdown on the highlighted election and select **Election County Settings**.



Confirm that **ePulse Secret, Key, and Slug** are populated. Click to activate **ePulse is Active** and **[Save]**.



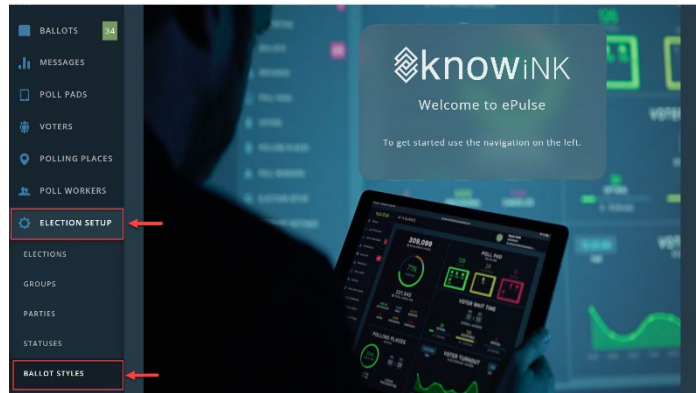
## Dominion-Specific Processes

Counties that use ES&S will NOT import the PrecinctBallotStylesFile generated from TotalVote. KNOWiNK will work with ES&S to create and import ballot styles into ePulse.

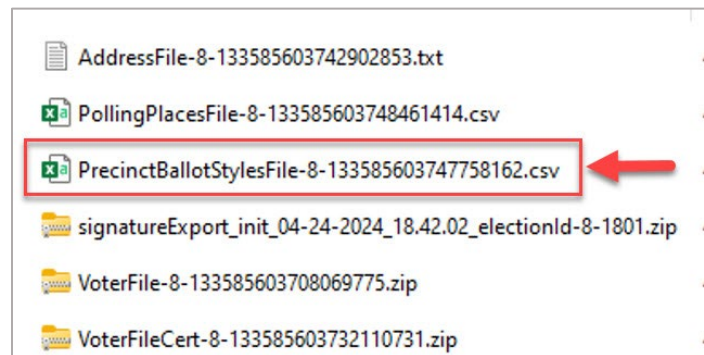
### Importing Ballot Styles



On the ePulse landing page, select **ELECTION SETUP > BALLOT STYLES** on the left rail.



Click **IMPORT** and [Choose a File].  
Navigate to the downloaded PrecinctBallotStylesFile- and double click to select it.  
Click [CONTINUE].



The system prompts **Done!** when the import is complete.  
Click **[DONE]**.



Verify that the number of ballot styles imported matches the number in the TotalVote Ballot Styles report and that there were no import errors.

Precinct	Split	Ballot Style	PDFs	Voters Count
1000	1	Republican, Regular: 1000 REP (REP1000 REP)   Language: English Democratic, Regular: 1000 DEM (DEM1000 DEM)   Language: English Nonpartisan, Regular: 1000 NON (NON1000 NON)   Language: English	0	
1001	1	Republican, Regular: 1001 REP (REP1001 REP)   Language: English Democratic, Regular: 1001 DEM (DEM1001 DEM)   Language: English Nonpartisan, Regular: 1001 NON (NON1001 NON)   Language: English	0	50
1002	1	Republican, Regular: 1002 REP (REP1002 REP)   Language: English Democratic, Regular: 1002 DEM (DEM1002 DEM)   Language: English Nonpartisan, Regular: 1002 NON (NON1002 NON)   Language: English	0	49

## TOTALVOTE

To compare against ballot styles in TotalVote, log in to TotalVote. Select **Reports > Reports > Ballot Styles List**.

Ballot Name	Ballot #	Precinct	Precinct Part	Active Registrants	Inactive Registrants	Eligible Underage Registrants	County
DOUG_GEN_NON_STY0001	4	01 Centerville	01.1 Centerville 1	277	10	0	DOUGLAS
DOUG_GEN_NON_STY0002	4	02 Fish Springs	02.1 Gen Valley (Fish Springs) 1	740	21	0	DOUGLAS
DOUG_GEN_NON_STY0003	4	02 Fish Springs	02.2 Fish Springs/Town 0308 2	719	61	0	DOUGLAS
DOUG_GEN_NON_STY0004	4	03 Gardnerville	03.1 Gen Valley (Gardnerville) 1	19	0	0	DOUGLAS

## Configuring Vote Card Encoders

### epulse

From the ePulse landing page, select **ELECTION SETUP > VOTER CARD ENCODER**. Enter **Security Key** and **Pin** provided by Dominion.

The screenshot shows the 'CARD ENCODER OPTIONS' settings page in the ePulse system. The left sidebar has 'ELECTION SETUP' highlighted with a red box and a red circle containing the number 1. Below it, 'VOTER CARD ENCODER' is also highlighted with a red box and a red circle containing the number 2. The main content area shows the 'SETTINGS' tab with the following options:

- Encoder: Dominion (DVS)
- Use Type: General Election
- Match Voters to Ballots by: Precinct, Split, Party
- Security Key: [Redacted]
- Security PIN: [Redacted]

A red box highlights the Security Key and Security PIN fields, with a red circle containing the number 3 next to it. A blue 'SAVE' button is located at the bottom right of the settings area.

### epulse

Select the Election **Use Type** from the dropdown list and **[SAVE]**.

- **General Election** has no party logic.
- **Primary Election** utilizes party logic.

This screenshot shows the same 'CARD ENCODER OPTIONS' settings page as the previous one, but with the 'Use Type' dropdown menu open. The dropdown menu lists three options: 'General Election', 'Closed Primary Election', and 'Open Primary Election'. A red arrow points to the 'General Election' option, and another red arrow points to the 'SAVE' button. The 'Security Key' and 'Security PIN' fields are still redacted.

## Poll Pad Election Testing in ePulse


County _____
Poll Pad # _____
Test Date/Time _____
Tester Name _____
Signature _____

For all Poll Pads and backups.

<p style="margin: 0;"><b>1</b></p> <p style="margin: 0;"><input type="checkbox"/> Pass</p> <p style="margin: 0;"><input type="checkbox"/> Fail</p>	<p><b>Verify or change current usernames and passwords</b></p> <p>a. <input type="checkbox"/> Select <b>POLL PADS &gt; CONFIGURATIONS</b></p> <p>b. <input type="checkbox"/> Select current configuration <b>3.5.0 General (Printing and Encoding)</b></p> <p>c. <input type="checkbox"/> Select <b>Security</b></p> <p>d. <input type="checkbox"/> Verify or change:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Menu Password</b></li> <li><input type="checkbox"/> <b>Advanced Functions Password</b></li> <li><input type="checkbox"/> <b>Guided Access Mode Passcode</b></li> <li><input type="checkbox"/> <b>Add Voter Jurisdiction Screen Password</b> (if applicable)</li> <li><input type="checkbox"/> <b>Jurisdiction Password Message</b> (if applicable)</li> <li><input type="checkbox"/> <b>Password to Remove Provisional Status</b></li> </ul>
<p style="margin: 0;"><b>2</b></p> <p style="margin: 0;"><input type="checkbox"/> Pass</p> <p style="margin: 0;"><input type="checkbox"/> Fail</p>	<p><b>Verify or change Poll Worker pin.</b></p> <p>a. <input type="checkbox"/> Select <b>ACCOUNT SETTINGS &gt; RESTRICTIONS</b></p> <p>b. <input type="checkbox"/> Confirm or select <b>Restriction preset: to One Pollworker Pin.</b></p> <p>c. <input type="checkbox"/> Confirm or change <b>Username and Pin.</b></p>

On Each Poll Pad and Backup Assigned to the Election

<p style="margin: 0;"><b>3</b></p> <p style="margin: 0;"><input type="checkbox"/> Pass</p> <p style="margin: 0;"><input type="checkbox"/> Fail</p>	<p><b>Verify Connectivity Status of WiFi and Bluetooth</b></p> <p>a. <input type="checkbox"/> Power on iPad and Star Micronics printer.</p> <p>b. <input type="checkbox"/> On the iPad WELCOME TO POLL PAD Home Screen, open <b>Settings</b>:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Verify <b>Wi-Fi</b> name of local network.</li> <li><input type="checkbox"/> Verify <b>Bluetooth</b> is <b>On</b>.</li> <li><input type="checkbox"/> Verify both <b>Power</b> and <b>Bluetooth</b> lights are displayed on printer.</li> <li><input type="checkbox"/> Select <b>Cellular Data</b>, verify <b>Cellular Data</b> is toggled <b>ON</b>.</li> </ul>
<p style="margin: 0;"><b>4</b></p> <p style="margin: 0;"><input type="checkbox"/> Pass</p> <p style="margin: 0;"><input type="checkbox"/> Fail</p>	<p><b>Verify the expected iOS version is installed:</b></p> <p>On the iPad WELCOME TO POLL PAD Home Screen:</p> <p>a. <input type="checkbox"/> Open <b>Settings</b>.</p> <p>b. <input type="checkbox"/> Under <b>General</b>, select <b>About</b>.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Record <b>iPad Name</b> _____</li> <li><input type="checkbox"/> Verify <b>iPadOS Version</b> shows <b>17.6.1</b></li> </ul>

<p>5</p> <p><input type="checkbox"/> Pass</p> <p><input type="checkbox"/> Fail</p>	<p><b>Verify the expected Poll Pad application version is installed:</b></p> <p>On the iPad WELCOME TO POLL PAD Home Screen:</p> <ol style="list-style-type: none"> <li><input type="checkbox"/> Open <b>Settings</b> and scroll to bottom left of screen.</li> <li><input type="checkbox"/> Select Poll Pad app shows version <b>3</b>.</li> <li><input type="checkbox"/> Verify <b>Bluetooth</b> is <b>ON</b>.</li> <li><input type="checkbox"/> Verify <b>Local Network</b> is <b>ON</b>.</li> <li><input type="checkbox"/> Verify <b>Microphone</b> is <b>ON</b>.</li> <li><input type="checkbox"/> Verify <b>Camera</b> is <b>ON</b>.</li> <li><input type="checkbox"/> Verify <b>Background App Refresh</b> is <b>ON</b>.</li> <li><input type="checkbox"/> Verify <b>Cellular Data</b> is <b>ON</b>.</li> <li><input type="checkbox"/> Verify <b>Seed Version</b> shows <b>3.5.0</b>.</li> <li><input type="checkbox"/> Verify <b>Build</b> shows <b>4</b>.</li> </ol>						
<p>6</p> <p><input type="checkbox"/> Pass</p> <p><input type="checkbox"/> Fail</p>	<p><b>Verify the Date and Time on the Poll Pad Home Screen are correct.</b></p>						
<p>7</p> <p><input type="checkbox"/> Pass</p> <p><input type="checkbox"/> Fail</p>	<p><b>Verify the expected Election is loaded into the Poll Pad application:</b></p> <p>On the Poll Pad application Home Page:</p> <ol style="list-style-type: none"> <li><input type="checkbox"/> Verify the correct election and election type are displayed: <b>[2024 General Election]</b></li> <li><input type="checkbox"/> Verify the election date shows <b>11/05/2024</b>.</li> <li><input type="checkbox"/> Verify the correct polling place for that Poll Pad is displayed.</li> <li><input type="checkbox"/> Verify number of <b>Precinct Records</b> and <b>Countywide Records</b>.</li> <li><input type="checkbox"/> Verify icons on top right are correct:</li> </ol> <div style="text-align: center;">  </div> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;"><input type="checkbox"/> Wait Time is <b>BLUE</b>.</td> <td style="width: 50%;"><input type="checkbox"/> Printer Status is <b>GREEN</b>.</td> </tr> <tr> <td><input type="checkbox"/> Message is <b>GRAY</b>.</td> <td><input type="checkbox"/> ePulse Synch is <b>GREEN</b>.</td> </tr> <tr> <td><input type="checkbox"/> Encoder Card is <b>GREEN</b>.</td> <td><input type="checkbox"/> Peer-to-Peer is <b>YELLOW</b>.</td> </tr> </table> <p><b>If not, follow troubleshooting procedures.</b></p>	<input type="checkbox"/> Wait Time is <b>BLUE</b> .	<input type="checkbox"/> Printer Status is <b>GREEN</b> .	<input type="checkbox"/> Message is <b>GRAY</b> .	<input type="checkbox"/> ePulse Synch is <b>GREEN</b> .	<input type="checkbox"/> Encoder Card is <b>GREEN</b> .	<input type="checkbox"/> Peer-to-Peer is <b>YELLOW</b> .
<input type="checkbox"/> Wait Time is <b>BLUE</b> .	<input type="checkbox"/> Printer Status is <b>GREEN</b> .						
<input type="checkbox"/> Message is <b>GRAY</b> .	<input type="checkbox"/> ePulse Synch is <b>GREEN</b> .						
<input type="checkbox"/> Encoder Card is <b>GREEN</b> .	<input type="checkbox"/> Peer-to-Peer is <b>YELLOW</b> .						
<p>8</p> <p><input type="checkbox"/> Pass</p> <p><input type="checkbox"/> Fail</p>	<p><b>Verify the receipt printing is functional.</b></p> <p>On the Poll Pad application Home Page:</p> <ol style="list-style-type: none"> <li><input type="checkbox"/> Select the printer icon in the top right part of the status bar. If Printer Status is <b>Not Connected</b>, follow troubleshooting procedures. <a href="#">Poll Pad with Encoder</a> <a href="#">Poll Pad with ExpressVote</a></li> <li><input type="checkbox"/> Select <b>Print Test Receipt</b>.</li> <li><input type="checkbox"/> Verify receipt specifies <b>Poll Pad Name</b>.</li> </ol>						