Connecticut Election Management System

Town Clerk User Manual

Version 1.0

March 11, 2016

Connecticut Election Management System

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1. SYSTEM REQUIREMENTS

- Windows Operating Systems 7 or higher
- Connecticut EMS is fully supported on the following browsers:
    - Internet Explorer: Version 9.0 or higher
    - Firefox: Version 4.0 or higher
    - Safari: 4.0 or higher
    - Google Chrome: 28.0 or higher
- Minimum screen resolution 1280 x 758 to 1266 x 768

2. TOWN CLERK LOGIN

Purpose: To allow the Town Clerk to log in with assigned permissions, change a password, and report a problem or get help from State Admin (SOTS).

Figure 2-1 Login screen

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Figure 2-2 First Time User Registration screen

How to Create First Time User – Town Clerk

1. The **Login** page will be displayed in the browser (Fig. 2-1).
2. Click on the "***First Time Logging In?***" link in the "Login Information" section.
3. The system will display the **First Time User Registration** screen (Fig. 2-2).
4. Select the town from the "Town" dropdown and "Town Clerk" from the "Select Role" dropdown. Enter information. Required fields are marked with a red asterisk.
5. Click the "***Submit***" button. The system displays an alert message. Select ***OK*** to close the pop-up.
6. The system will send a request to State Admin for approval of the new user.
7. Once State Admin has approved the user, the system will send a notification email to the Town Clerk's email address that was entered on the **First Time User Registration** screen.
8. The Town Clerk will now be able to log in from the **Login** page (Fig. 2-1). In the "Login Information" section, select "Town Clerk" from the "Select Role" dropdown, enter the Username & Password, and click the "***Login***" button.
9. Passwords expire in 90 days, at which time the user is prompted to enter a new password. The prompt for the password change will begin 10 days prior to the password expiration date. ***Please note that you may not use any of your last 3 passwords.***

Note: ***Passwords must be between 8-26 characters long and must contain at least one character from three of these four character types:***

- ***Uppercase alpha***
- ***Lowercase alpha***
- ***Numeric***
- ***Special character.***

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How to Log In

1. Enter the URL "CTEMS.SOS.CT.GOV" in the browser's address bar and click Enter.
2. Select "Town Clerk" from the "Select User" dropdown and enter the Town Clerk Username and Password on the **Login** screen (Fig. 2-1). If logging in for the first time, see *Section 2* **How to Create a First Time User – Town Clerk.**
3. Click the "***Login"*** button.

How to Change a Password

1. From the Dashboard, select the "Maintenance" tab and click on "Change Password" to display the **Change Password** screen (Fig. 2-3).
2. Enter the Old Password, enter the New Password, & re-enter the New Password. Click the "***Change Password***" button. The system displays an alert message.

Figure 2-3 Change Password screen

Note: ***Passwords must be between 8-26 characters long and must contain at least one character from three of these four character types:***
- ***Uppercase alpha***
- ***Lowercase alpha***
- ***Numeric***
- ***Special character.***

Please note that you may not use any of your last 3 passwords.

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How to Report a Problem or Get Help – from the Login page

1. From the **Login** page, click on the "***Report a Problem or Get Help***" link (Fig. 2-4).

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Figure 2-4 Login screen

2. The system displays the **Report a Problem or Get Help** screen (Fig. 2-5).

Figure 2-5 Report a Problem or Get Help screen

3. Select town from the "Town" dropdown, enter information, and summarize the problem or question in the "Message" section. Be sure to include your email address. You may attach a file using the "Browse" feature.
4. Click the "***Send Message***" button. Your message, attachments, and contact information will be sent to the State Admin EMS dashboard.

3. TOWN CLERK DASHBOARD

Purpose: TO ALLOW THE TOWN CLERK TO ACCESS THE FUNCTIONALITY OF THE CONNECTICUT ELECTION MANAGEMENT SYSTEM.

The Dashboard Basics

1. Once the Town Clerk has logged in successfully, the system will display the Dashboard (Fig. 3.1), with the following tabs across the top that allow the user to access the Connecticut Election Management System functions:
   - Dashboard

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- Candidates
- Party Ranking
- Winners
- Reports
- Head Moderator's Return
- View Stats
- View Question Results
- Maintenance.

Figure 3-1 Town Clerk Dashboard

2. The Dashboard displays two sections: "Active Elections" and "Office Requests" (Fig. 3-1).
3. The system will display only Active Elections for the town in which the Town Clerk is logged in.
4. The Town Clerk can view the *List of Offices*, *List of Nominees*, *Grids Report*, and *Winners Report* for an election by clicking the respective link in the "Active Elections" section.
5. The offices which have been requested by the Town Clerk will be displayed under the "Office Requests" section. *(This will be explained in detail in Section 4.4.)*

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How to Create Notification of Number of Electors and Polling Places Report

1. From the Dashboard, select the "Maintenance" tab and click on "Notification of # Electors and # Polling Places" to display the **Notification of Number of Electors and Number of Polling Places** screen (Fig. 3-2).

## Figure 3-2 Notification of # of Electors and # of Polling Places screen

2. The system displays "No Data Found" until a *Notification* report has been generated.
3. Click the "***Notification of Number of Electors and Number of Polling Places***" button to display the **Notification of Number of Electors and Number of Polling Places** screen with Voting Districts and Precincts (Fig. 3-3).

Figure 3-3 Notification of # of Electors and # of Polling Places screen with Voting Districts and Precincts.
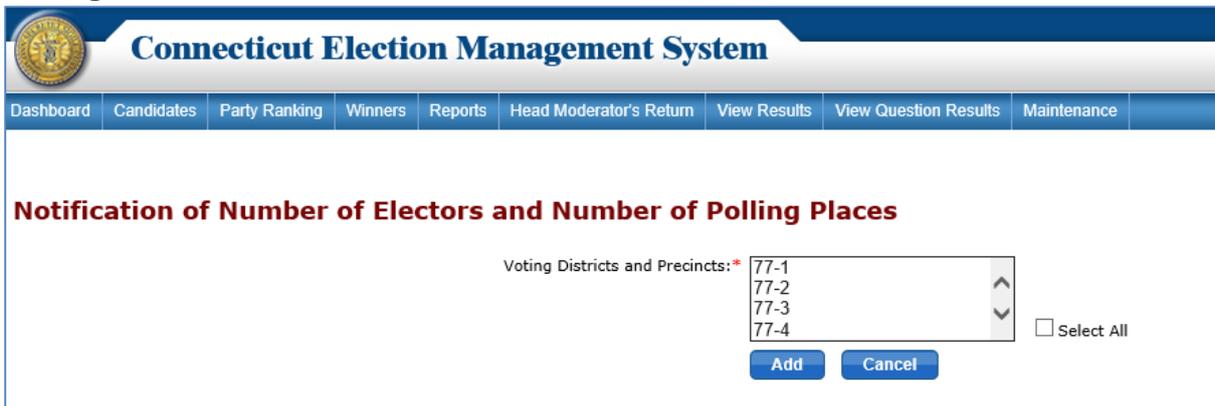
4. Select the Voting District(s) and click the "***Add***" button. The system displays an alert message. Select **OK** to display the Notification grid for the selected Voting District(s) (Fig. 3-4).

Figure 3-4 Notification Grid

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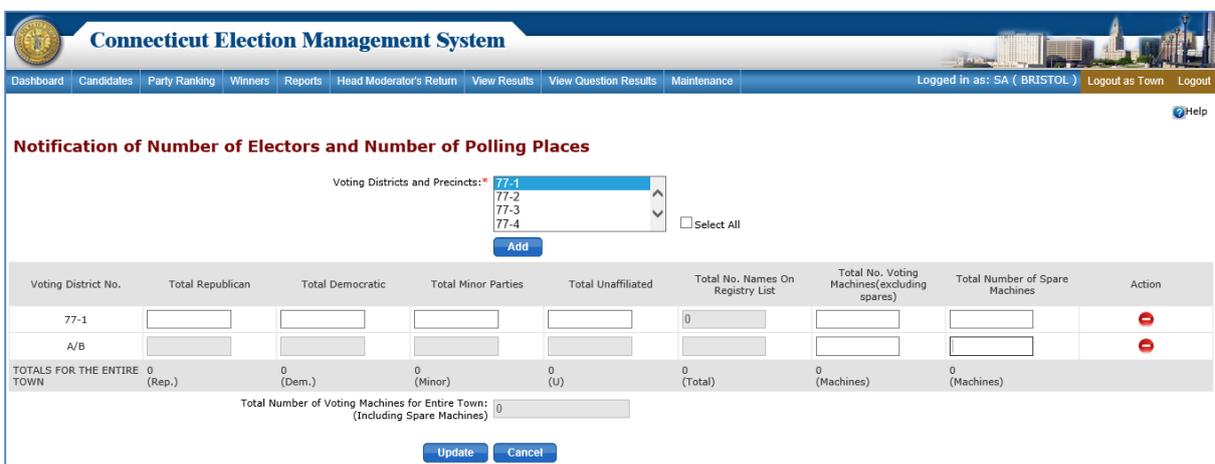
5. Each town will have an A/B (central absentee counting) precinct available as an optional selection in the dropdown menu. Select the A/B precinct if the town uses centralized absentee counting. Note that only the "Total No. Voting Machines" and "Total Number of Spare Machines" data entry fields will be enabled for the A/B precinct.

6. Enter the data into the fields. As you enter the data, the system will calculate the "Number on the Registry List" and "Total Number of Machines" and populate those fields.

7. Click the "**Save**" button.

8. The system will save the data entered and return to the previous screen, where a summary row of the *Notification* record created will be displayed (Fig. 3-5).

Figure 3-5 Notification of # of Electors and # of Polling Places screen - with Summary Row

9. To edit a *Notification* report, click the "**Edit**" icon. The system displays an alert message. Select *OK* to continue to the **Notification** grid, or select *Cancel* to close the pop-up without taking any action.

10. After updating the details, click the "**Update**" button. The system displays an alert message. Click **OK** to update the *Notification* report.

11. The system will save the data entered and return to the previous screen. A summary row for the amended *Notification* report will display. The original *Notification* summary row, and a summary row for any previous amendments, will also display.

12. To delete a *Notification* report, click the "**Delete**" icon. The system displays an alert message. Select *OK* to delete the report, or select *Cancel* to close the message without taking any action.

13. To print the most recent *Notification* report, select the "Reports" tab from the Dashboard to display the **Reports** screen. Click the radio button next to "Notification of Number of Electors and Number of Polling Places." Click the "**Generate Report**" button to generate the *Notification* report. (*More information about reports in Section 5. Reports.*)

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4. INTRODUCTION TO ELECTIONS
(Step by Step Guide to Primaries and Elections)

4.1. PARTY RANKING

Purpose: TO ALLOW THE TOWN CLERK TO MANAGE MUNICIPAL PARTY RANKING. PARTY RANKING SHOULD BE DETERMINED FIRST BEFORE ANY OTHER ACTIONS ARE TAKEN. PARTY RANKING ALLOWS THE SYSTEM TO GROUP THE PARTIES AND CANDIDATES IN THE CORRECT ORDER FOR THE CREATION OF THE HEAD MODERATOR'S RETURNS AND THE PRE AND POST-ELECTION REPORTS. INCLUDE "WRITE IN" CANDIDATES AS A PARTY (THIS SHOULD BE YOUR LAST PARTY, UNLESS YOU HAVE A NON-PARTISAN BOARD).

How to Maintain (Add/Edit/Delete) Party Ranking

1. Click on the "Party Ranking" tab from the menu bar to display the **Manage Ranking** screen. The system will display "No Data Found" until a Party Ranking has been generated (Fig. 4-1).

Figure 4-1 Manage Ranking screen

2. Select the Election from the "Election" dropdown.
3. To assign a party, highlight the party in the left box and click on the Move Right **"(>)"** button to move it to the right box. Select multiple parties by holding down the Control key while highlighting the parties. Once highlighted, move them to the right by clicking on the "**(>)**" button.
4. Once the selected parties are in the box on the right, use the "(∧)" and "(∨)" buttons to adjust the order of the rankings.
5. After making the party selection(s) and ranking them in the correct order, click the "**_Save Ranking_**" button. The system displays an alert message. Select **OK** to save party rankings.
6. The system returns to the **Manage Ranking** screen with a summary row for the election for which party ranking was saved (Fig. 4-2).

Figure 4-2 Manage Ranking screen – with Summary Row for Election

7. To edit the Party Ranking, click the "**Edit**" icon in the "Action" column next to the election. The system will display party ranking for the selected election.

8. Update the desired parties/party ranking and click the "*Update*" button. The system displays an alert message. Select **OK** to update the ranking, or select **Cancel** to close the page without taking any action.

9. To delete a Party Ranking, click the "*Delete*" icon in the "Action" column. The system displays an alert message. Select **OK** to delete the Party Ranking, or select **Cancel** to close the page without taking any action.

10. To generate a *Party Ranking* report, select the election from the dropdown and click the "*Generate Report*" button to display the report in a PDF format.

11. The Town Clerk will rank parties for municipal elections. The State will rank parties for state elections.
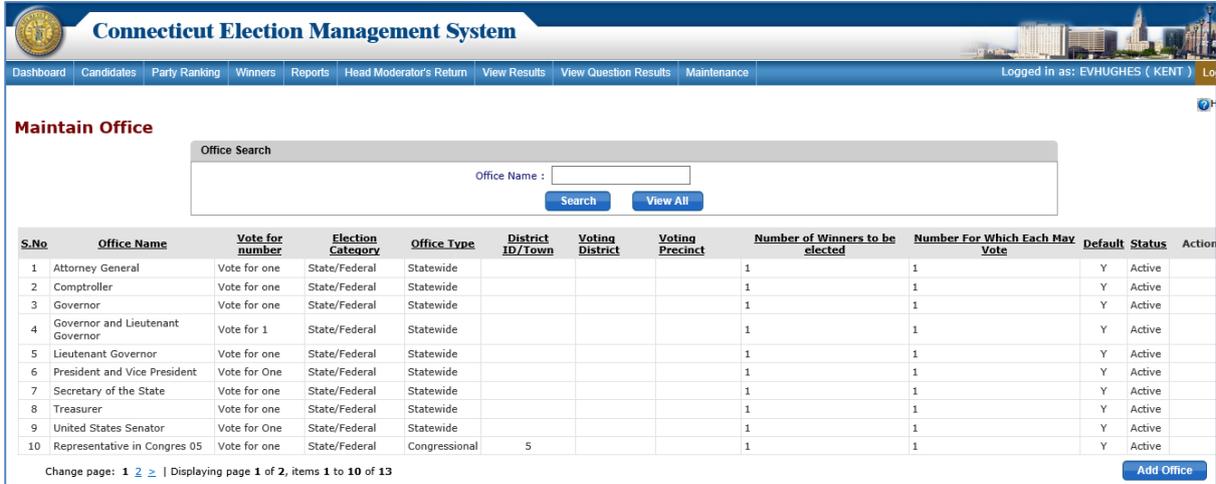
4.2. ADD OFFICE

Purpose: TO ALLOW THE TOWN CLERK TO ADD MUNICIPAL OFFICES AND ESTABLISH THE TERMS OF THE OFFICES AND THE NUMBER OF WINNERS TO BE ELECTED. THIS INFORMATION FLOWS INTO THE HEAD MODERATOR'S RETURN AND PRE- AND POST-ELECTION REPORTS.

How to Add Offices

1. From the Dashboard, select the "Maintenance" tab and click on "Maintain Office" to display the **Maintain Office** screen (Fig. 4-3).
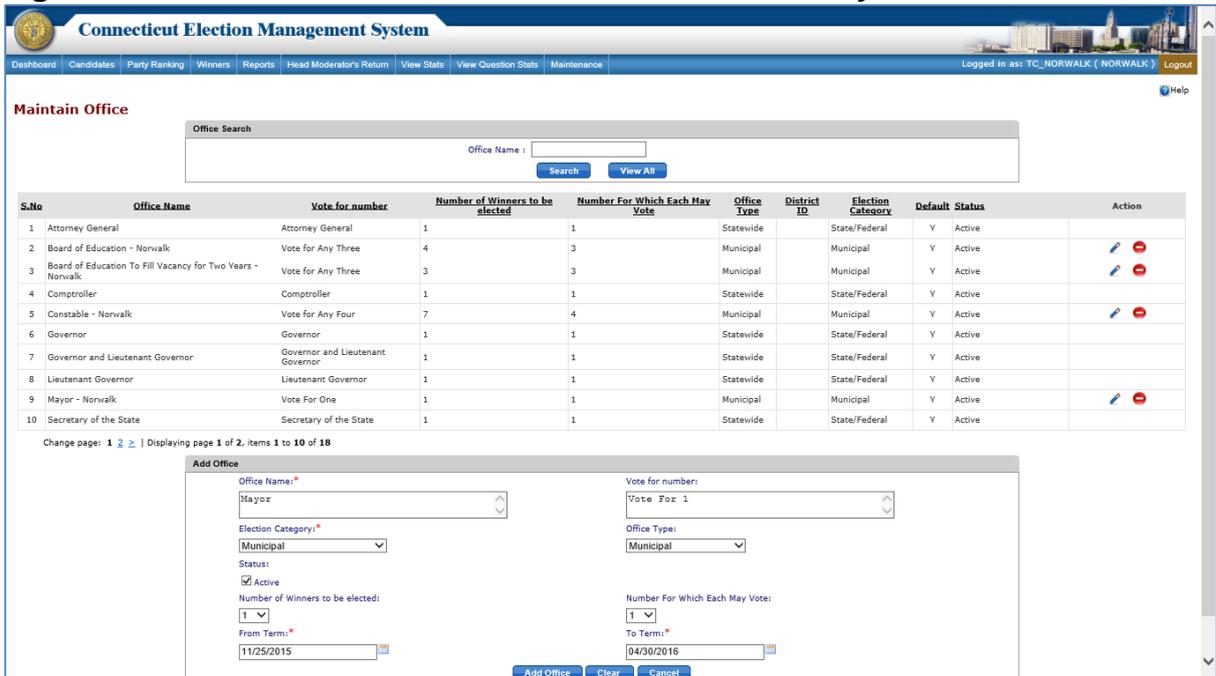
Figure 4-3 Maintain Office screen

2. To search for an office, enter the office name and click the "**Search**" button. The system will display the search results.
3. To display the complete list of offices in the grid below the "Office Search" section, click the "**View All**" button.
4. To add a municipal office, click the "**Add Office**" button. Data entry fields will display below the "Office Search" section (Fig. 4-4).

Figure 4-4 Add Office screen – with Add Office data entry fields

5. Enter the office information. A red asterisk indicates a required field.
6. Select "Municipal" from the "Election Category" dropdown and "Municipal" from the "Office Type" dropdown.

7. The "Active" checkbox defaults to checked so that the office will be available to be assigned on the **Assign Offices** screen.
8. Click the "***Add Office***" button. The system will display an alert message. Select ***OK*** to add the office, or select ***Cancel*** to return to the previous screen without taking any action.
9. The system returns to the **Maintain Office** screen with a summary row for each office in the town.

4.3. EDIT/DELETE OFFICE

Purpose: TO ALLOW THE TOWN CLERK TO EDIT AND DELETE MUNICIPAL OFFICES.

How to Edit/Delete Offices
1. To edit an office, click the "***Edit***" icon next to the office to be edited in the "Action" column. Data entry fields populated with the office information will display below the "Office Search" section.
2. Make any changes to office information and click the "***Update***" button. The system will display an alert message. Select ***OK*** to update the office details, or select ***Cancel*** to return to the previous screen without taking any action.
3. To delete an office, click the "***Delete***" icon next to the office to be deleted. The system will display an alert message. Select ***OK*** to delete the office, or select ***Cancel*** to go back to the **Maintain Office** screen without taking any action.
4. The Town Clerk can only edit or delete municipal offices.

Additional Information
1. The Town Clerk can Edit/Delete a municipal office if it is NOT assigned to an election.
2. If an office is assigned to an election and NO candidates have been assigned to the election, then
    a. Town Clerk can edit the office details.
    b. Town Clerk can delete the office by first un-assigning it from the election.
3. If an office is assigned and the candidates are entered for the election, then
    a. Town Clerk can edit the office information except Election Category, Office Type, and Town/District information.
    b. Town Clerk can delete the office by first un-assigning it from the election.
4. If an office is assigned to an election and the results are saved/submitted by HM for that election. then
    a. Town Clerk CANNOT delete the office.
    b. Town Clerk CANNOT un-assign the office.
5. When the Town Clerk edits office information that was assigned to an election with results saved/submitted, then the system will create a new office with the updated information and must keep the old office details as-is in order to maintain its previous election history.
6. The Town Clerk can view the offices added by State Admin, but cannot perform any action.

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4.4. ASSIGN OFFICES TO ELECTION

Purpose: TO ALLOW THE TOWN CLERK TO ASSIGN OFFICES TO ELECTIONS. THE TOWN CLERK WILL ASSIGN OFFICES TO THE MUNICIPAL ELECTIONS. THE STATE ADMINISTRATOR ASSIGNS OFFICES TO STATE/FEDERAL ELECTIONS. THE TOWN CLERK CAN ASSIGN A MUNICIPAL OFFICE TO A STATE ELECTION WITH THE APPROVAL OF THE STATE ADMINISTRATOR.

How to Assign Offices to an Election

1. From the Dashboard, select the "Maintenance" tab and click on "Assign Offices to Election" to display the **Assign Office(s)** screen (Fig. 4-5).

Figure 4-5 Assign Office (s) screen

2. To assign offices, first select an election from the dropdown. Highlight the offices to be assigned from the list of offices in the left-hand box and click the Move Right **"(>)"** button to move them to the right-hand box. To select multiple offices, hold down the Control key while highlighting the offices and click the "**(>)**" button. To move all offices, click on the "**(>>)**" button. Use the "(Λ)" and "(V)" buttons to establish the order of the offices.
3. Once offices have been moved to the right-hand box, click the "*Save*" button. The system will display an alert message and assign the offices to the selected election.
5. To assign a municipal office to a State or Federal Election, the Town Clerk must send a request to State Admin (SOTS).
   a. From the **Assign Offices** screen, move the municipal office(s) to be assigned to the right-hand box.
   b. Click the "*Save*" button. The system displays an alert message. Select *OK* to send the request to State Admin. The system displays an alert message.

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      c.   Once State Admin (SOTS) has approved the office, a notice of approval/rejection will display under the "Office Requests" section of the Town Clerk Dashboard (Fig. 4-6).

Figure 4-6 Approved Office Request

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4.5. MAINTAIN CANDIDATE(S)

Purpose: TO ALLOW THE TOWN CLERK TO ADD, EDIT, AND DELETE CANDIDATES FOR MUNICIPAL OFFICES. INFORMATION ENTERED WILL CREATE PRE- AND POST-ELECTION REPORTS.

How to Maintain (Add/Edit/Delete) Candidates

1.   From the Dashboard, select the "Candidates" tab and click on "Add/Search Candidate(s)" to display the **Add/Search Candidates** screen (Fig. 4-7).
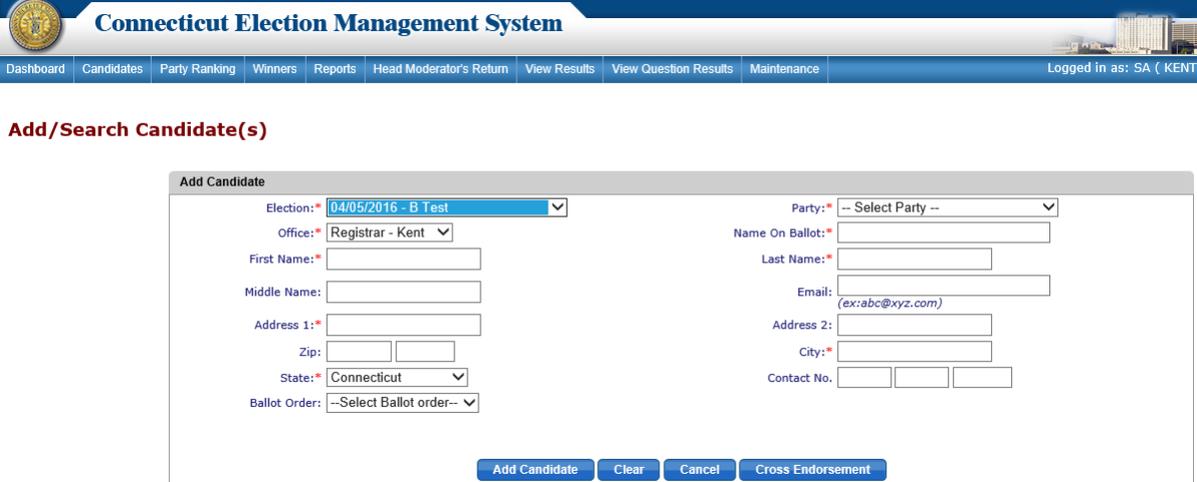
Figure 4-7 Add/Search Candidate(s) screen

2.   To add a new candidate, click the "**Add Candidate**" button to display the **Add Candidate** data entry screen (Fig. 4-8).

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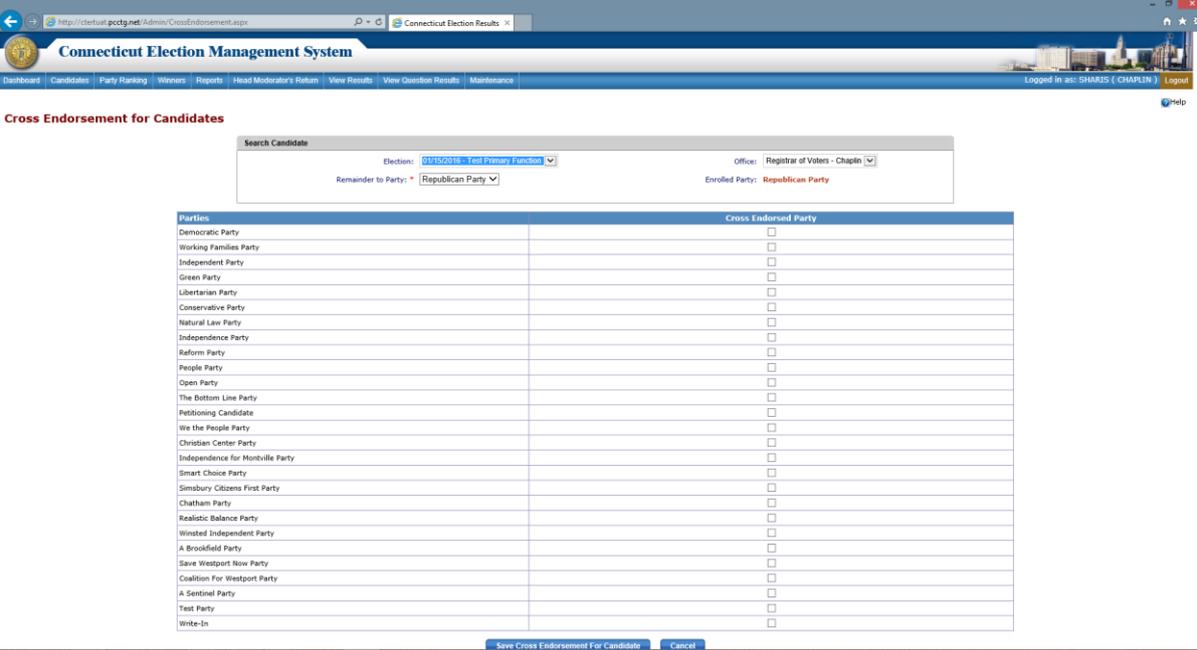## Figure 4-8 Add Candidate – Data Entry screen

3. Select an election and enter the candidate information. A red asterisk indicates required information.
4. To enter a Cross Endorsement for a candidate, select the "***Cross Endorsement***" button. The **Cross Endorsement for Candidate** screen will display (Fig. 4-9).

Figure 4-9 Cross Endorsement for Candidate screen

5. Check the box next to each party that is cross endorsing the candidate.
6. Click the "***Save Cross Endorsement for Candidate***" button. An alert message will display.
7. Select **OK** to save the cross endorsements for the candidate. The system will return to the **Add Candidate** screen. Click the "***Add Candidate***" button. The system will display

an alert message. Select *OK* to add the candidate, or select *Cancel* to return to the previous screen without taking any action.

8. To search for a candidate, select an election and enter information in one or more of the following fields: Office, Party, Name on Ballot, First Name, and Last Name. Partial names may be entered.

9. The "Name on Ballot" uses type ahead search - begin typing the candidate name, and the dropdown will display a list of candidates whose names begin with those letters.

10. Click the "*Search*" button to display the search results in a grid below the "Search Candidate" section (Fig. 4-10).

Figure 4-10 Search Candidates – Search Results grid

11. To add a candidate who has previously been entered in the system as a candidate in the municipality, search for that candidate by selecting the election and entering information in one or more of the following fields: Office, Party, Name on Ballot, First Name, and Last Name. Partial names may be entered. Select the "*Search*" button to display the search results in a grid below the "Search Candidate" section.

12. Select the "Copy/Move" icon under the "Action" column. The system will display an alert message. Select *OK* to display the **Move Candidate** screen (Fig. 4-11).

Figure 4-11 Move Candidate screen

13. Select the election to which to assign the candidate from the "Election" dropdown, edit any information, and click the "***Move Candidate***" button. An alert message will display. Select ***OK*** to move the candidate to the election, or select ***Cancel*** to return to the previous screen without taking any action.
14. The system will assign the candidate to the selected election.
15. Do not copy a Candidate to a new election until winners have been announced for the original election. To move candidates from a Primary to a General Election, refer to *Section 4.7 Move Candidates to General Election.*
16. To edit a candidate, click on the "**Edit**" icon under the "Action" column. The system will display data entry fields populated with the selected candidate's information.
17. Update the candidate's information, then click the "***Update Candidate***" button. The system displays an alert message. Select ***OK*** to update the candidate's information, or select ***Cancel*** to return to the previous screen without taking any action.
18. To delete a candidate, click the "***Delete***" icon under the "Action" column. The system will display an alert message. Select ***OK*** to delete the candidate or select ***Cancel*** to go back without taking any action.

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4.6. PRIMARIES

Purpose: THE STATE ADMINISTRATOR WILL CREATE THE ELECTION AND LINK THE PRIMARY TO THE ELECTION. THE TOWN CLERK WILL ADD THE MUNICIPAL OFFICES AND CANDIDATES TO THE PRIMARY, FOLLOWING THE SAME STEPS AS ABOVE FOR ADDING OFFICES AND CANDIDATES TO THE ELECTION.

Summary of Managing Primary Election

1. **ADD AND ASSIGN OFFICES**: *Sections 4.2 and 4.4*. Select the Primary Election from the dropdown and the offices you wish to add. If offices are added to a State/Federal election, notification will be sent to State Administrator for approval. The notice of approval/rejection will display on the "Office Requests" section of the Dashboard.
2. **ADD CANDIDATES**: *Section 4.5*. Select the PRIMARY, OFFICE and PARTY**.** Click add candidate. Enter information into the data entry fields. For the "Endorsed Candidate", the box should be checked (Fig. 4-12). An asterisk will display next to the endorsed candidate's name on all the reports, and the candidate will be displayed as the first candidate on the report within that office.

Figure 4-12

Additional Information for Conducting Primaries
3. AFFIDAVIT OF ABSENTEE BALLOT: *Section 4.9*.
4. CERTIFICATION OF BALLOT ORDERED: *Section 4.10.*
5. HEAD MODERATOR'S RETURN TEMPLATE: *Section 4.11*.
6. HEAD MODERATOR'S RETURN: *Section 4.12*.
7. ANNOUNCE MUNICIPAL WINNERS: *Section 4.15*.

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4.7. MOVE CANDIDATES TO GENERAL ELECTION

Purpose: TO ALLOW THE TOWN CLERK TO MOVE CANDIDATES WHO HAVE WON THE PRIMARY TO THE GENERAL MUNICIPAL ELECTION.

How to Move Candidates from the Primary to the General Election

Note: Candidates cannot be moved from a Primary to General until all the winners of the offices assigned to the election have been announced.

1. From the Dashboard, select the "Candidates" tab and click on "Move Candidates to General Election" to display the **Move Candidates to General Election** screen (4-13).

Figure 4-13

2. Select the "Election" and "Office" from the dropdowns to display the list of candidates in the grid below the "Search Candidates" section.
3. Click the "***Move Candidates***" button. The system will display an alert message. Select ***OK*** to move candidate, or select ***Cance***l to return to previous screen without taking any action.

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4.8. MAINTAIN QUESTIONS

Purpose: To ALLOW THE TOWN CLERK TO ADD, EDIT, AND DELETE QUESTION(S). QUESTIONS MUST COMPLY WITH STATUTE (START WITH *SHALL,* END WITH A *?,* AND BE ABLE TO BE ANSWERED WITH A *YES* OR *NO*).

How to Maintain (Add/Edit/Delete) Questions(s)

1. From the Dashboard, select the "Candidates" tab and click on "Add Questions" to display the **Add Questions** screen (Fig. 4-14).

Figure 4-14 Add Question screen

2. Select the Election from the "Election" dropdown, enter the question details into the "Question" section, and check the applicable checkboxes available on the right side of the "Question" section.
3. Click the "***Add Question***" button. The system displays an alert message. Select ***OK*** to add the question.
4. If the question will be added to a State Election, the system will send a request to State Admin (SOTS). Once State Admin (SOTS) has approved the office, a notice of approval/rejection will display under the "Questions" section of the Town Clerk Dashboard and the system will display the **Add Question** screen with a summary row for each question added (Fig. 4-15).

Figure 4-15 Add Question screen - with Summary Row
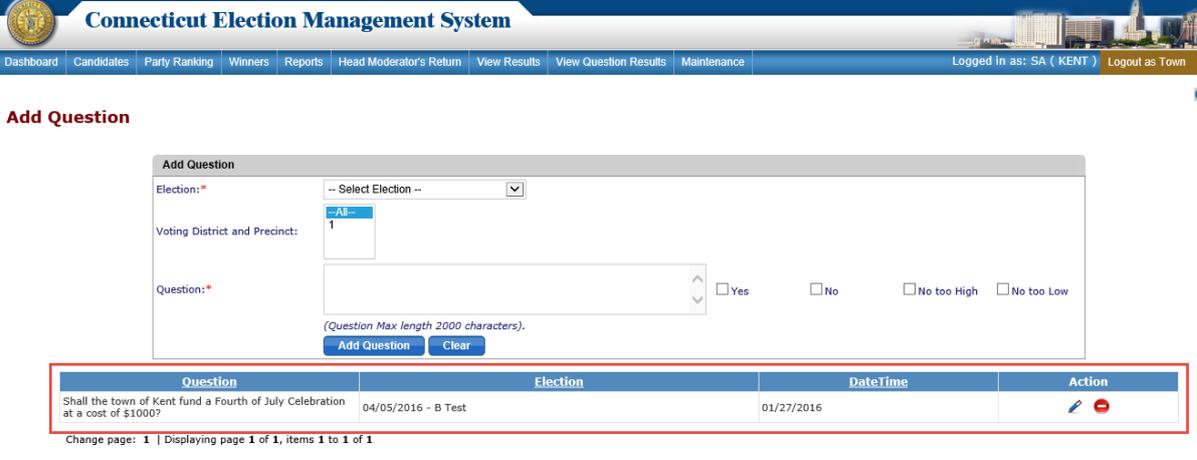
Additional Information

1. The Town Clerk can add multiple questions.
2. The questions will be displayed for Registrars, Town Clerks, & Head Moderators of the town for which they are logged in.
3. Once the question results are submitted for an election, the system does not allow the user to delete the question.
4. Questions added by Town Clerk cannot be updated/deleted by other users, and vice versa.

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4.9. AFFIDAVIT OF ABSENTEE BALLOT

Purpose: TO ALLOW THE TOWN CLERK TO CREATE THE AFFIDAVIT OF ABSENTEE BALLOT (IF APPLICABLE, BY POLLING PLACE). ONCE CREATED, THE USER CAN GENERATE AN ABSENTEE BALLOT FORM FROM THE "REPORTS" TAB.

How to Create Affidavit of Absentee Ballot

1. From the Dashboard, select the "Maintenance" tab and click on "Affidavit of Absentee Ballot" to display the **Affidavit of Absentee Ballot** screen. Until an Affidavit has been created, the system displays "No Data Found" (Fig. 4-16).

Figure 4-16 Affidavit of Absentee Ballot screen
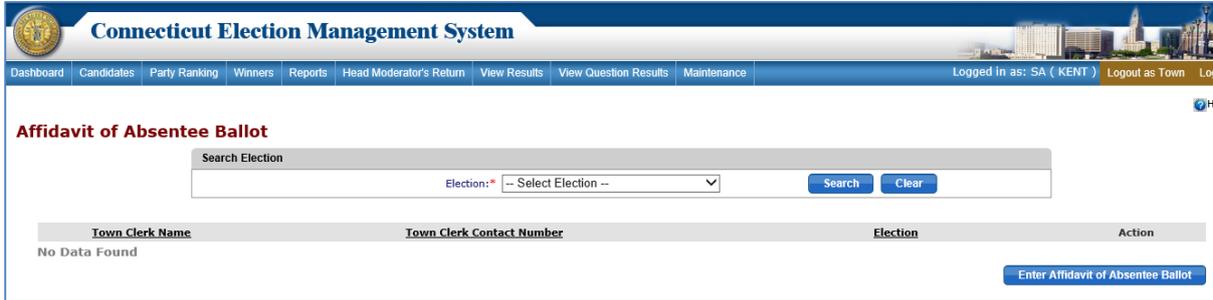
2. To search for a previous Affidavit, select the election and click the "**Search**" button to display Affidavits that have been created for that election.

3. Click the "**Enter Affidavit of Absentee Ballot**" button to display the **Affidavit of Absentee Ballot** data entry screen (Fig. 4-17).

Figure 4-17 Affidavit of Absentee Ballot – Data Entry screen
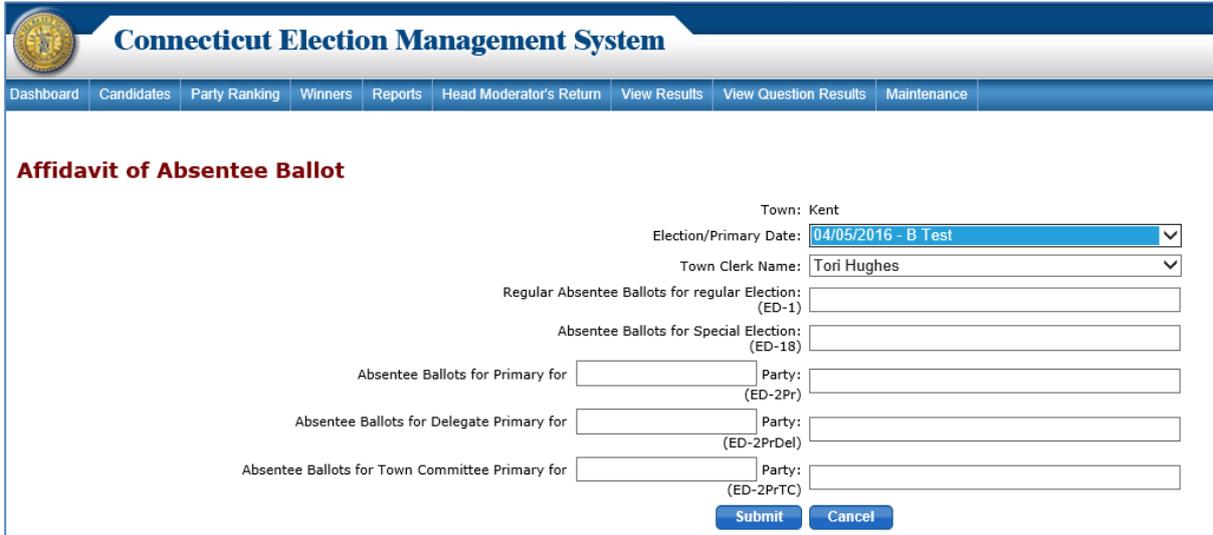
4. Select an "Election/Primary Date" and the "Town Clerk Name" from the respective dropdowns. Enter the remaining information. Click the **"Submit"** button. The system displays an alert message.

5. Select **OK** to save information and return to the previous screen, where a summary line for the Affidavit is displayed (Fig. 4-18).

Figure 4-18 Affidavit of Absentee Ballot – with Summary Row
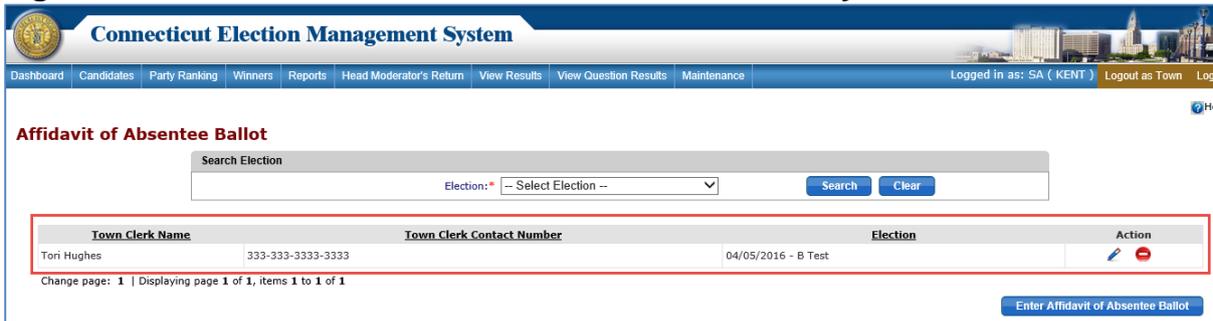
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6. To edit the Affidavit, click the "*Edit*" icon next to the record to edit. The system displays an alert message. Select *OK* to continue to the **Update Affidavit of Absentee Ballot** screen.

7. After updating the details, click the "*Update*" button. The system displays an alert message. Select *OK* to update the details, or select *Cancel* to return to the previous screen without taking any action.

8. To delete an Affidavit, click the "*Delete*" icon next to the record to delete. The system displays an alert message. Select *OK* to delete the Affidavit or *Cancel* to return to the previous screen without taking any action.

9. To print the *Affidavit of Absentee Ballot* report, select "Reports" on the menu bar. Click the radio button next to **"Affidavit of Absentee Ballot",** select the desired election from the dropdown, and click the "*Generate Report*" button.

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4.10. CERTIFICATION OF BALLOT ORDERED

Purpose: TO ALLOW THE TOWN CLERK (AND REGISTRAR OF VOTERS) TO CERTIFY THE NUMBER OF BALLOT ORDERED FOR A POLLING PLACE/DISTRICT.

How to Create the Certification of Ballot Ordered

1. From the Dashboard, select the "Maintenance" tab and click on "Certification of Ballot Ordered" to display the **Certification of Ballot Ordered** screen.   Until a Certification has been created, the system displays "No Data Found" (Fig. 4-19).

Figure 4-19 Certification of Ballot Ordered screen

2. To create a Certification of Ballot Ordered record, click the "*Enter Certification of Ballot Ordered*" button to display the **Certification of Ballot Ordered** data entry screen (Fig. 4-20).

Figure 4-20 Certification of Ballot Ordered – data entry screen

3. Select an "Election/Primary Date" and "Polling Place Name" from the respective dropdowns.
4. Enter the "Number of Ballots Ordered" and "Percentage of Ballots per Voter Ordered."
5. Enter Historical Information for the last 4 similar elections. As the "Number of Registered Voters" and "Number Checked as Having Voted" is entered, the system will calculate the "Turnout Percentage." To add rows, click the "➕" icon.
6. Once data is entered, click the "***Certify***" button. The system displays an alert message. Select ***OK*** to save the Ballot Ordered record details, or select ***Cancel*** to go back to previous screen without taking any action.
7. To view Ballot Ordered Certifications that have previously been entered, select the election and click the "***Search***" button. The system displays the Certification of Ballot Ordered for that election.
8. To edit the Ballot Ordered record, click the "***Edit***" icon next to the record to be edited. System displays an alert message. Select ***OK*** to continue to the **Certification of Ballot Ordered** data entry screen, which will be populated with the details.
9. After updating the ballot ordered details, click the "***Update***" button. The system displays an alert message.
10. To delete a Ballot Ordered record, click the "***Delete***" icon. The system displays an alert message. Select ***OK*** to delete the record.
11. To print the _Certification of Ballot Ordered_ report, select "Reports" on the menu bar. Click the radio button next to "Certification of Ballot Ordered", select the election, and click the "***Generate Report***" button. The system will generate a _Certification of Ballot Ordered_ report.
12. The Registrar of Voters must have assigned at least one polling place to the primary/election before this form can be created.
13. Both the Town Clerk and the Registrar of Voters must certify the Ballot Ordered record.

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4.11. HEAD MODERATOR'S RETURN TEMPLATE

Purpose: To allow the Town Clerk or Registrar of Voters to Generate a Head Moderator's Template. This form is a paper copy of the Head Moderator's Return. Names of candidates will be in the same order as the tapes for easy data entry.

How to Generate Head Moderator's Return Template

1. From the Dashboard, select the "Reports" tab and click on "Head Moderator's Return Format" to display the **Head Moderator's Return Format** screen (Fig. 4-21).

Figure 4-21 Head Moderator's Return Format screen
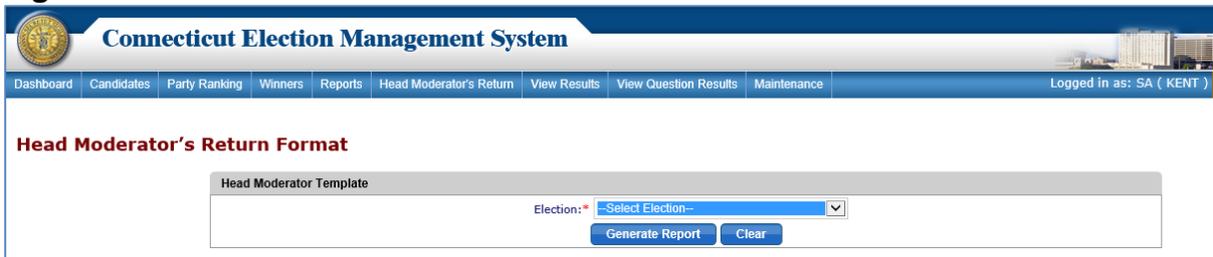
2. Select the election and click the "*Generate Report*" button to generate a blank *Head Moderator Return* template with all the Candidates and Offices listed for an Election in PDF format, which can be sent to a configured printer (Fig. 4-22).
3. The votes will be manually entered by the Polling Place Moderator and duly signed.

Figure 4-22 Head Moderators Return Format - PDF

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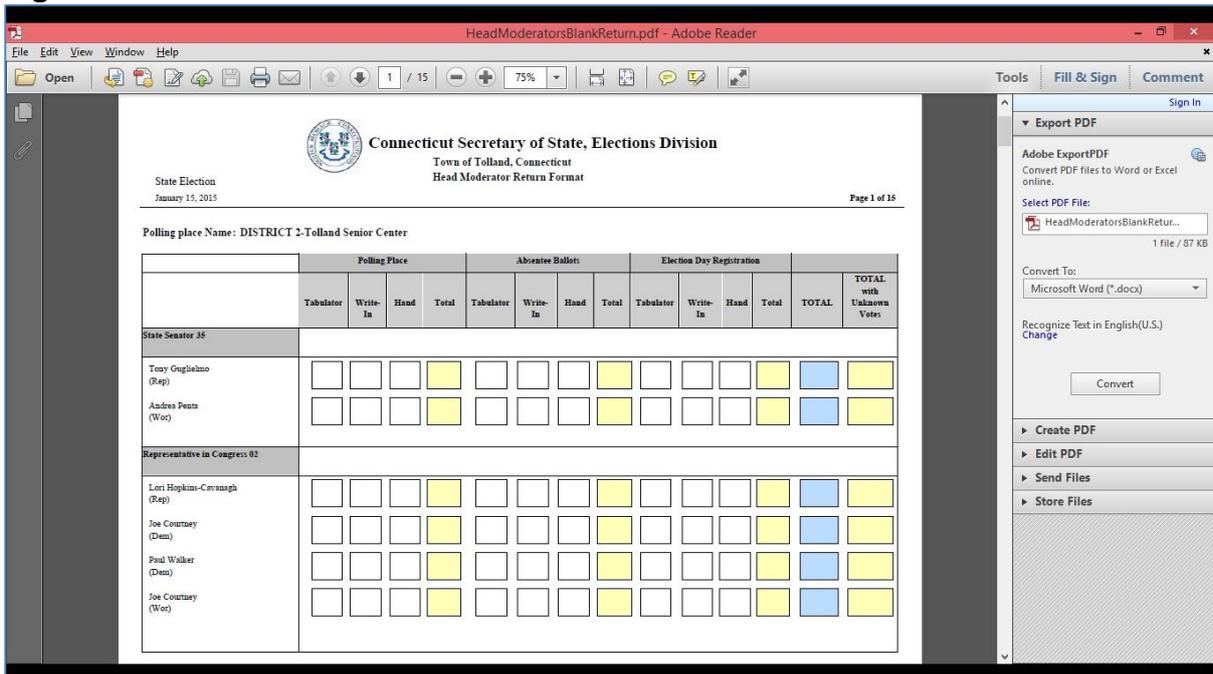
4.12. HEAD MODERATOR'S RETURN

Purpose: TO ALLOW THE TOWN CLERK TO VIEW AND PRINT THE HEAD MODERATOR'S RETURN.

How to View and Print the Head Moderator's Return

1. From the Dashboard, select the "Head Moderator's Return" tab from the menu bar to display the **Head Moderator's Return** screen.
2. Select the election and click the "*Search*" button to display the results for the selected election that have been submitted by the Head Moderator. Each original and amended return that has been submitted for the selected election will be displayed and available to View (Fig. 4-23).

Figure 4-23 Head Moderator's Return screen

3. From the "Actions" section, the Town Clerk can view the results, approve the results for a municipal election and generate a report.
4. Click the "*View*" link in the "Actions" section to display a pop-up window which shows the results submitted by the Head Moderator.
5. Click the "*Generate* **Report**" link in the "Actions" section to display a report in PDF format which shows all the results information.
6. The user can generate a *Head Moderator's Return* report for each original/amendment record submitted.

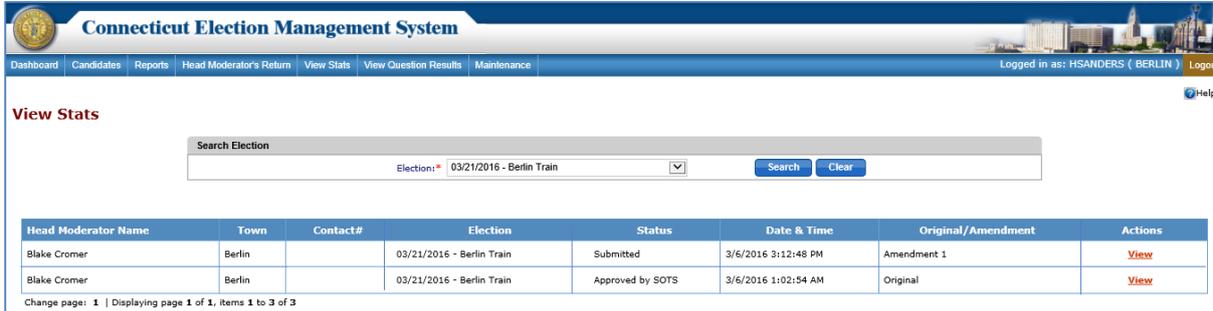NOTES:_____

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4.13. VIEW STATS

Purpose: TO ALLOW THE TOWN CLERK TO VIEW AND PRINT THE STATS SUBMITTED BY THE HEAD MODERATOR.

How to View and Print Municipal Stats Submitted by the Head Moderator

1. From the Dashboard, select the "View Stats" tab from the Menu Bar to display the **View Stats** screen (Fig. 4-24).

Figure 4-24 View Stats screen

2. Select the election and click the "***Search***" button to display the results submitted by the Head Moderator for the selected election.

3. Click the "***View***" link in the "Actions" section to display a pop-up window which shows the stats submitted by Head Moderator. The stats may be printed from this screen by right clicking and selecting "Print."

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4.14. VIEW QUESTIONS RESULTS

Purpose: To Allow the Town Clerk to View and Print the Questions results submitted by Head Moderator.

How to View and Print Questions Results

1. From the Dashboard, select the "View Question Results" tab from the menu bar to display **View Questions Results** screen (Fig. 4-25).

Figure 4-25 View Questions Results screen

2. Select the election and click the "***Search***" button to display the Question Results submitted by Head Moderator in the grid below the "Search Election" section.

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3. Click the "*View*" link in the "Actions" section to display a pop-up window which shows the Questions Results submitted by Head Moderator.
4. Click on "*Generate Report*" link to display a report in PDF format which shows all the Questions Results information.

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4.15. ANNOUNCE WINNERS

Purpose: TO ALLOW THE TOWN CLERK TO ANNOUNCE WINNERS FOR MUNICIPAL OFFICES.

How to Announce Winners

1. From the Dashboard, select the "Winners" tab from Menu Bar to display the **Announce Winners** screen (Fig. 4-26).

Figure 4-26 Announce Winners screen

2. Select the "Election" and "Office" from the respective dropdowns. The system will display the list of candidates in the grid below the "Announce Winners" search section.
3. Select the winning candidates by checking the check box provided beside every candidate. Winners will appear in green. Click the "*Announce Winners*" button.
4. After Winners are announced, reports and certificates can be generated.

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5. REPORTS

Purpose: TO ALLOW THE TOWN CLERK TO GENERATE REPORTS BASED ON THE SELECTION OF ELECTION AND OFFICE. ALL THE REPORTS CAN BE GENERATED IN PDF AND EXCEL FORMAT, WHICH CAN BE DOWNLOADED TO YOUR DESKTOP OR PRINTED FROM A CONFIGURED PRINTER.

How to Generate Reports

1. From the Dashboard, select the "Reports" tab from the menu bar to display the **Reports** screen (Fig. 5-1).

Figure 5-1 Reports screen

Below is the list of reports:
- Notification of Number of Electors and Number of Polling Places
- List of Offices to be Filled
- List of Nominees
- Question Report
- Grids Report
- Affidavit of Absentee Ballot
- Certification of Ballot Ordered
- Polling Place Report
- Moderator/Head Moderator's List
- Election Day Registration, Turnout and Absentee Ballot Statistics
- EDR Ballot Report
- Overseas Ballots Report
- Military Ballots Report
- Presidential Ballots Report
- Provisional Ballots Report
- Winners Notification Report
- Certificate
- Total Votes Cast by Office / Candidate
- Inventory Report
- Election Results by Voting District

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2. Select the report by clicking the radio button beside the desired report. If the report selected is specific to an election or office, dropdowns will be enabled to select the election and/or offices.
3. Click the "**Generate Report"** button to generate the report.
4. In order to generate the reports related to results, the Head Moderator's Return, Statistics and Questions Results must have been approved/accepted.
5. In order to generate the reports related to the winners, the winners must have been announced.
6. Reports can be generated only for the statistics/results for the town in which the user is logged in.

How to Generate a *Statement of Vote*

1. To generate a *Statement of Vote*, select the "Reports" tab from the Dashboard and click on "Statement of Vote." The **Statement of Vote** screen will display (Fig. 5-2).

Figure 5-2 Statement of Vote screen

2. Select the Election, Office(s), and File Type from the respective dropdowns.
3. Click the "**Generate Report**" button to generate the *Statement of Vote* report for the selected office(s).

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