

REGISTRAR OF VOTERS

BlueCrest Vantage Mail Sorter: Sort (2nd) Pass

PROCEDURE DOCUMENT - Version 4.2

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BlueCrest Vantage Mail Sorter: Sort (2nd) Pass

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Scope

This procedure is to be used in the Ballot Department and is not applicable in any other departments. It has been designed for the Ballot Sorting Machine Operator and any other personnel assigned to sorting ballots after the signature verification process. This process is to be performed daily during the election and must be completed before end of canvass.

Purpose

This is the process where the BlueCrest machine sorts the Mail Envelopes by precinct range and separates the Envelopes that were challenged during the Signature Verification Process.

Running Sort Pass

Loading Trays for Sort 2nd Pass

 Once the Sorting Team receives the Sort Pass Report, the machine operator and another Sorting Team Member will set up the sorter machine with trays from the "Ready for 2nd Sort" rack(s) using the "Sort Pass Report".





Note: Make sure that all trays from the same report stay together on one rack.

- Find the first tray on the "Ready for Sort 2nd Pass" rack with the corresponding "Sort Pass Report."
- 3. Find the corresponding batch/tray number under "Sort Pass Report" on the Sort Pass Report.
- 4. Pull the tray from rack, and place in a new bakers' rack, set it from left to right, top to bottom. Repeat for the all the trays listed on the Sort Pass Report.

Note: Place all the mail trays belonging to the **"Sort Pass Report"** in numerical tray order.

- 5. After all trays have been pulled for the sort pass report, pull out the pocket tray tags, reading out loud the Batch/Tray Number as you go.
- 6. Machine Operator will confirm on Sort Pass Report each batch as it is called out, confirming that it all matches.



- 7. Machine Operator confirms with another team member that the trays on the rack match the batch numbers on the Sort Pass Report, by calling out the tray numbers.
- 8. Read the numbers on the tray tag, one a time, example 12345 is "One -two-three-four-five."
- 9. Pull out the tray tags and binder clip pocket tray tags with Sort Pass Report.
- 10. Hang the tray tags with the report, on the rack using a magnetic bulldog clip.
- 11. Machine Operator must communicate to team members which Batch Letter is being run through the Sort Pass.

12. Sweeping team members will set up two baker's racks with cart signs labeled "Ready for Batch Audit" with the same letter as the Sort Pass Report at the end of the machines.



Loading the Envelopes

1. Place the Separator Card first, at the beginning of each tray.



2. Load the belt with the mail envelopes right side up onto the belt with the barcode facing the feeder.



3. Make sure a Separator Card is placed at the beginning of each tray with the barcode facing the same way as the envelopes.

Note: If separator cards are not placed between the batches when running multiple batches at once, the batch will go to the Didn't Scan Tray Tag (pocket 19), forcing the team to run the envelopes through the machine a second time after the tray tag is printed.

4. Click or tap the New Pass button.



Note: A New Pass dialog box will appear.

- 5. Under "Pass Type" select Relia-Vote Sort.
- 6. Under "Sort Scheme" select the most recent **SortPass** scheme related to the election.
- 7. Select OK.



8. **Click** on the Hold Magazine and Hold Feeder, making sure they light up prior to clicking on the start button.



Note: Lights off means that Feeder and Magazine are running. Lights on means that Feeder and Magazine are not running.

9. Click the Start button.



10. Click on Hold Magazine and Hold Feeder to start feeding envelopes through.



Note: Lights off means that Feeder and Magazine are running. Lights on means that Feeder and Magazine are not running.

11. The envelopes should feed through the machine at this point, sorting envelopes to the:

| Pockets | Sorted Into |
|-----------|---|
| 1-16 | Challenge Side |
| 17-24 | Issues |
| 25-46 | Valid Side |
| 23 and 24 | Dynamic Overflow |
| 47 and 48 | Hardware Rejects |
| 35 and 36 | Left empty to provide space for sweepers. |

Processing Issues

When all the envelopes have run through the machine, sweepers will have to check for issues before we can close the pockets and continue with the process. Sweepers will need to check for envelopes sent to the end bucket, hardware rejects and any envelopes found in pockets 17-24. These envelopes will need to be researched by the Machine Operator to have them re-ran and placed in their proper pockets.

Sweepers will bring envelopes found in **Pockets 17-24, 47-48** and from **the End Bucket** to the Machine Operator. Additional research is needed to get the envelopes in a Valid or Challenge pocket.

- 1. **Pocket 17 Double Feed:** Envelopes get stuck together and are placed in this pocket. Run these envelopes after dealing with other issues.
 - a. Check 'Disable Double Detector' box.
 - b. Place a separator card in front of the envelopes.
 - c. Feed envelopes one at a time.
- 2. **Pocket 18 Rejects/Out of Scheme:** Scan and check each envelope on Relia-Vote.
 - a. Check under history to see if envelope has been previously scanned by machine.
 - b. Check envelopes AV_ID (barcode) if it is readable, if not able to scan barcode, reprint AV_ID and place over QR code on envelope.
 - c. Place a separator card in front of the envelopes and feed the envelopes through.
- 3. **Pocket 19 Didn't Scan Pocket Tray Tag:** Pocket tray tag was never scanned before running the Sort Pass, or there was no blue separator card before this batch ran through the feeder.
 - a. Generate a pocket tray tag by pressing the button for pocket 19.
 - b. From Relia-Vote, Click on Tools \rightarrow Tray Check-In.
 - c. Scan pocket tray tag barcode.
 - d. Place a separator card in front of envelopes, and load envelopes back on the belt.

Note: If envelopes start going to pocket 19 (didn't scan tray tag), immediately stop the machine and speak to your supervisor to identify what happened.

- 4. **Pocket 20 Manually Verify:** Check the history of each envelope in Relia-Vote Application ID.
 - a. If the history says the envelope needs to be manually verified or no history is available for that envelope, it may not have been seen during the Incoming Pass.
 - b. Place it in an appropriate tray on a rack labeled "Ready for Incoming Pass" with correct return date and return source.
- 5. **Pockets 23 and 24 Dynamic Overflow:** Envelopes that are in this pocket whose designated pocket is already full. These envelopes are run through the sort pass again placing a separator card in the front.
- 6. **Pockets 47 and 48, and End Bucket Hardware Reject:** Check the history of the envelope in Relia-Vote Application ID Review.
 - a. Check what tray number it belongs to.
 - b. These envelopes can just be manually put into that tray in order by sequence.
 - c. If the barcode has been scanned and history shows that the envelope has not been seen, place envelope back on magazine with a blue separator card in front.

Sort (2nd) Pass VBM Envelopes with Issues

For Machine Operator to Review. If they need to be ran, they must be run separately per issue.

| Pocket # | Issues | Reason/Action | |
|-------------|----------------------------|--|--|
| 17 | Double Feed | Rerun ballots with Double Detector disabled | |
| 18 | A. Reject/Out of Scheme | Verify history of AVID in Relia-Vote (left monitor) | |
| | B. Barcode issues | Print AVID label and place it over barcode | |
| 19 | Didn't Scan Tray Tag | Stop machine Notify Data Workflow to check in tray | |
| | | Once Data Workflow has completed, continue | |
| 20 | Manual Verify | Talk to Supervisor | |
| 22 | In Review | Sig Ver did not close Dims correctly or Data workflow chose the incorrect batch number in the Database. 1. Stop the machine | |
| | | 2. Notify Data Workflow | |
| 23-24 | Dynamic Overflow | Double Check AVIDs to see if they were assigned to a tray. If assigned to tray place into their assigned tray. | |
| | | 2. Clear full pockets if not assigned to a tray | |
| | | 3. Run through machine, will go to pocket 19 | |
| | | 4. Print tray tag | |
| | | 5. Check in tray | |
| | | 6. Run again with separator card | |
| 47, 48, and | Hardware Reject, Bucket at | 1. Verify history of AVID in Relia-Vote (left | |
| End Bucket | | Place in proper tray or re-run as needed. | |

Closing All Open Dynamic Pockets

- 1. Once all issues have been resolved, shout "Closing Pockets" to the team.
- 2. Click on the Stop button.



- 3. Press **O** to open the New Pass dialog box and click "*Close All Open Dynamic Pockets*".
- 4. Press **OK** to print out Pocket Tray Tags for all trays.



5. To print out tray tags, **gently** press and release the button next to the light for any given pocket.

Note: Be extra gentle when pressing the button once. DO NOT turn off flashing lights until AVID's are properly identified to each pocket tray tags.



6. Pull out and separate the pocket tray tags printed out.



7. Verify that the **first** and **last** AVID on the tray tag match the ballot envelopes in the tray for every valid pocket.

8. Place the pocket tray tag ticket for each pocket in the tray tag holder located outside of the mail tray.



9. After the tray tags print out and AVIDs are all correct, **gently** hold down the button next to the flashing light until it stops flashing. Repeat for each pocket.

Note: The light will also flash during a pass if a pocket becomes full. If that happens, gently press the button to print out a tray tag and then reset the pocket by gently holding down on the button next to the flashing light.

10. If there are ballots in Pocket 16, the light will not blink. Press the button lightly for one second to generate a tray tag and verify the First and Last AVID match with the ballots inside the tray.

Note: If the first and last AVIDs for pocket 16 do not match, inform a lead or a supervisor.

11. Once all lights are off, Team Members will shout "Lights Out" before Operator ends the pass.



Note: Make sure all the flashing red lights are reset.

Ballot Sweepers' Duties

Sweepers: Ensure that there are no envelopes left from the previous sort pass.

Left Side – Valid Ballots

- 1. From the Machine Operators view, the **Left** side should have two designated sweepers and the right side should have one designated sweeper.
- 2. Sweepers on **Left** side will need to have an empty Baker's rack with the "**Batch Letter"** sign associated with the pass.



- 3. The machine will sort the envelopes by precinct, sending them into their designated pockets 25-46 (Pockets 35-36 are not used).
- 4. Sweepers will pick up the envelopes and place them right-side up, yellow facing forward from back to front in the empty trays below each pocket (blue bar facing up), ensuring they are kept in order.



- 5. If a pocket becomes full, there will be a flashing red light and the machine operator will call out the pocket number.
- 6. Empty all the envelopes in the pocket and place them in the appropriate mail tray.
- 7. **Gently** press the button in front of the pocket next to the blinking light.



- 8. After the release button has been pressed, a tray tag will print out from the closest printer to the right of the pockets.
- 9. Sweeper will take the pocket tray tag from the printer, verify the AVID number on the first and last envelope in the tray matches the first and last AVID numbers on the pocket tray tag.
- 10. Sweeper will then place the tray onto the rack marked **Ready for Batch Audit** with the letter that matches the Sort Pass Report. (If the AVID numbers do not match with the pocket tray tag let the machine operator know right away).





Note: The sort pass mail trays are placed in the baker's rack by pocket number.

Note: The light will also flash during a pass if a pocket becomes full. If this happens, gently press the button to print out a tray tag, then reset the pocket by gently holding down on the button next to the flashing light until it stops blinking. Insert the tray tag slip and move the full mail tray to the baker's rack and replace it with an empty mail tray.

- 11. Let Machine Operator know that lights are out and good to continue with running sort pass.
- 12. Machine Operator will open the covers to verify the mail track to assure no envelopes fly off the track and never reach a pocket.
- 13. Machine Operator will shout "Closing Pockets" once everyone has indicated the "All Clear."

Right Side – Challenged Ballots

1. Sweepers on **the Right** side will need to have a Baker's rack filled with empty pre-labeled challenged trays with a "**Ready for Batch Audit"** sign (with the letter that matches the Sort Pass Report) attached to the rack.



The machine will sort out the challenged envelopes on the Challenge side for Pockets 1-16.

Note: Pocket 16 doesn't print out a ticket. Gently push the button and place envelopes in pocket 16 with pocket tray tag.

2. Sweepers will pick up the envelopes and place them right side up yellow facing forward from back to front in the empty trays below each pocket, ensuring they are kept in order.

3. Sweepers need to verify the first and last AVID numbers before placing the mail trays in the valid Ready for Batch Audit rack.

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4. The printed pocket tray tags associated with the challenged envelopes need to be placed inside the mail trays.

Authorization

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