

REGISTRAR OF VOTERS

BlueCrest Vantage Sorter: Incoming (1st) Pass

PROCEDURE DOCUMENT – Version 5.1

De Guzman, Erman 9/13/2024

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BlueCrest Vantage Sorter: Incoming 1st Pass

Scope

The purpose of Incoming 1st Pass is to import signatures into DIMS.net, the county's election management system, and to prepare envelope trays for Sort 2nd Pass. This process gives Signature Verification team a steady workflow.

After signatures are imported into DIMS, the Signature Verification Team is responsible for matching the signature from the envelope with the signature on record.

Note: Machine Operators must ask Data Workflow Lead to create a SIF file prior to importing. See Data Workflow Procedure for reference.

L:\Ballot\Ballot Sorting Coord\EDoCS\Procedures\Data Workflow\Procedure DataWork flowProcessing-IncomingScan 2023-08-23.docx

Importing the SIF File

To import the .SIF file:

- 1. From the left monitor desktop, double-tap the Mozilla Firefox icon to connect to Relia-Vote.
- 2. Using the keyboard, log in using your username and password.

Ŗ	Please Login:	
	User Name:	
	Language: English V Login	

Note: See your area supervisor or department manager if you have not been issued a login.

- 3. Select Relia-Vote.
- 4. Select Import.
- 5. Select Import SIF.

© BLUECREST								
Argos								
Relia-Vote	Tools	BlueCrest Management Console						
Reports	Import >	Import SIF						
User	Reports	Signature Verification						
Utilities	Application ID Review	1						
Logout	Application ID Search							
	Tray Check-In							
	Tray Review							
	Configuration							

6. Select the checkbox next to the SIF file with the latest creation date, and then click Import.

SIF File Import								
	Customer	<u>Filename</u>	Creation Date	<u>Size</u>				
	San Bernardino County Elections >	20230711_173714.sif	07/11/23 05:37	423.5 MB				
	C	Import						

7. While SIF file is importing, start loading envelopes on the conveyer.



Incoming Verification Log

- 1. Operator needs to fill out the Incoming Verification Log before starting Incoming pass. The Incoming Verification Log helps keep track of what is being run during the Incoming Pass.
- 2. The following information should be filled out, Start Time, Returned Date of VBMs (Vote-By-Mail), and Return Source.

Election – Date							
Incoming Verification Log							
		Machin	e #:	4207			
Line	Time Started (New Pass)	Date Returned	Return Source	Time Ended (End Pass)	Pieces Ran	Last Tray	Initia
1	9:00 am	07/17/23	Mail	11:00 am	1000	13431	ED
2	1:00 pm	07/24/23	Mail	3:00 pm	999	13456	ED
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13		/ /			ļ		
14							
15							
16					ļ		
17		/ /					
18							
19							
20			ļ;				
Operat Lead St Name:	or/ aff Frank Sin	atra	C)ate: 07	/24/202	23	

3. Load envelopes onto magazine belt right side up. Make sure the envelopes are facing toward the feeder with the barcode closest to the feeder entrance.



Note: Make sure the envelopes are loaded neatly and snug against the feeder belt.

4. Place the mail handle behind the mail envelopes to secure their place toward the feeder and make sure the mail handle is placed correctly on the magazine belt.



Running the Incoming (1st) Pass

The sorter machine operator is responsible for making sure the sorter machine is ready to process the ballot envelopes.

1. From the **Right Monitor** main screen, double tap the Transport Control icon.



NOTE: Wait a few seconds for the system to load before pressing green button. You should see a message indicating that the system is locked and press the green button.



2. Press and hold the Green button for a few seconds (you should hear two clicks).



Starting a Pass

1. **Click** the New Pass button.



Note: A *New Pass* dialog box will appear.

- 2. On the Incoming Verification Log, fill in the Time Started column with the current time.
- 3. In the Pass Type Presets list, select *Incoming* (1st) Pass Preset.
- 4. In the Sort Scheme field, select the *Incoming Pass* associated with the current election.
- 5. Select OK.

Preset			
Argos	8		
Incomi	ng (1st) Pass Pres	et	
Sort (2)	nd) Pass Preset		
Sort Sch	eme	-	
Sort Schi Incoming	eme _Pass_2020-11-0	3	
Sort Sch Incoming	eme _Pass_2020-11-00	3	
Sort Sch	eme _Pass_2020-11-0	3	

- 6. Select the Return Date.
- 7. Select **OK** to start the Incoming Pass.

Note: The return date can differ between passes, so be sure to select the correct date.

	5 310.	•	S	epte	mbe	r 202	0	▶	
		Sun	Mon	Tue	Wed	Thu	Fri	Sat	
2		30	31	1	2	3	4	5	
		6	7	8	9	10	11	12	
		13	14	15	16	ക	18	19	
		20	21	22	23	24	25	26	
		27	28	29	30	1	2	3	
		4	5	6	7	8	9	10	
		2	Too	lay: \$	9/17	/202	0		
		C	C	IK		Ca	ance	I	

8. Adjust Transport Speed to a comfortable setting.

Note: Training speed is 80 ips, but during election, you can use between 80-130 ips; adjust to comfort.



9. Select **Thick**, this controls the magazine's velocity speed.



10. Have a team member verify that the information entered is correct.

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



- 13. Once the machine is running (you'll hear several clicks as the pockets test themselves), press **S** on the keyboard.
- 14. A dialog box will appear. Click the dropdown arrow to show the different return sources.
- 15. Select the **<u>Return Source</u>** associated with the batch of envelopes.

Plea	se enter a separator card number.	×
	B000000039 [POLLS: Returned from polling places.] B000000039 [POLLS: Returned from polling places.] B000000048 [OFFICE: Returned to the Registrar of Vote B000000057 [FAX: Returned by fax.] B000000066 [EARLY VOTING SITE: Returned from an B000000075 [DBOP OFF LOCATION: Returned from a B000000075 [DBOP OFF LOCATION: Returned from a B000000084 [MAIL: Returned by mail.] B000000093 [OTHER: Returned from a different source. B000000093 [OTHER: Returned from a different source.	

- 16. Have another team member verify the correct mail source entered is correct.
- 17. Press OK.
- 18. Let your sweeping team members know that you are ready to run the envelopes by shouting,

"Incoming" so they know to be ready.

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



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

Note: The envelopes should feed through the machine at this point. You may place more envelopes from the same return source and return date (i.e., Mail, Office, Polls, etc.) onto the belt/magazine as needed while the envelopes are moving through the machine.

Warning: If at any point the machine endangers someone's life or is at risk of damaging itself, immediately hit the emergency stop button.

- 20. When all envelopes have been run, Machine Operator will call out for "Any Issues".
- 21. Stop the machine to process the issues.
- 22. Click on Hold Magazine and Hold Feeder.



23. Wait for the sweepers to bring all issues to ReScan.

Ballot Sweepers' Duties

- 1. Sorter must have two designated sweeping team members on each side of the machine.
- Sweeping team members should be ready to pick up envelopes from the pockets, filling up the empty mail trays below each pocket from back to front. All envelopes will face Yellow side forward with blue bar on top left.



Note: This method will keep envelopes in the order the machine sorted them, with the first ballot being in the back and the last ballot in the front.

- 3. Check the issue pockets (**pockets 1-10**) for envelopes.
- 4. Separate all other issues and hand them to the operator.
 - a. For example, pockets 3 & 4, are to be handed to Operator separately.
 - b. Hardware Rejects, and End Bucket needs to be checked manually through Relia-Vote.

Note: Refer to page 14 for a list of other potential issues.

Running Envelopes thru ReScan

1. Tap on ReScan



Note: The screen will appear turquoise. This means that the machine is in ReScan mode.



- 2. Press **O** to open the dialog box and adjust the necessary Pass Options.
- Only check the ones that are necessary for the issue ReScan that is being ran (see the section "Envelopes with Issues")

Options Select	×
Standard	
Pass Type	
Argos Belia-Vote Incoming	
Relia-Vote Sort Test Hardware	
Pass Options	
Close All Open Dynamic Pockets	
Disable Date Time Printing	
Disable Double Detector	
Disable No Signature Detection	
Disable Over Under Measurements	
	and the second s

4. Click on Hold Magazine and Hold Feeder.



Note:

- Lights on \rightarrow means that Feeder and Magazine are not running.
- Lights off \rightarrow means that Feeder and Magazine are running.
- Adjust the Pass Options as needed until all envelopes run through the sorter machine.

Rescan Issues Incoming (1st) Pass Only

Pocket Numbers	Issues	Action (Rescan Mode)			
1	Re-Scan	Run through in Re-Scan Mode			
2	Manual Verify	Check with Supervisor			
3	Double feed or multiple VBM Envelopes are scanned at the same time	 Disable Double Feed Detector VBM Envelopes from this pocket must be fed through the machine one envelope at a time 			
5, 7, 8, 10	Random issues ~ example, VBM Envelopes are upside down	 Disable Over/Under Measurements Disable Stacker Skew Detection Disable Thickness Measurements 			
6	Oversized envelopes (envelopes with potentially too many cards inside)	VBM envelopes from this pocket (6) must remain in until the pass has ended, and then placed in a separate mail tray with its own tray tag (fill in Return Date and Return Source).			
		Keep this tray aside until all incoming scan from mail has been run. Run through in Re- Scan Mode and keep separate from other VBM Envelopes.			
9	Reject/Out of Scheme Barcode reading issues 	 Verify history of AVID in Relia-Vote (using the left monitor) 			
	g	 Print AVID label and place it over barcode 			
	 Incorrect election date 	 Previous Elections date is placed in the "Too Late" box 			
11	Pre-challenged	Place these envelopes in Supervisor Review Mail Trays.			
12	Suspended Ballots	VBM Envelopes from this pocket (12) must remain in, until the pass has ended, and placed in the appropriate mail tray with its own Pocket Tray Tag with Returned Date and Returned Source.			
47, 48, and the End Bucket	These VBM Envelopes did not go to the correct pocket or did not scan.	Verify history of AVID in Relia-Vote (using the left monitor)			

Looking up an Application ID on Relia-Vote

Some envelopes may need to be reviewed to ensure that they are unchallenged or to figure out why they are not going through the mail ballot sorter.

- 1. Select Relia-Vote.
- 2. Select Application ID Review.



3. Using the scanner wand, scan the barcode (or type it if, it doesn't scan).

Application ID Paview	
Application ID Application ID	Lookup

4. Click the "History" tab to check the status of the ballot envelope.

General Information History		
Voter Name: DWAINE COVEL	Tray Number: N/A	□ Out Sort
Customer: SB	Tray Seq No:	□ Invalidated
Election: 3944	User Defined 2	
Precinct: 2231	User Defined 2:	
Ballot: 2231	User Defined 3:	
Routing Barcode: N/A	User Defined 4:	
Tracking Barcode: N/A	User Defined 5:	
Receipt Date:	Return Method:	
Challenge Code: WANDA Orphaned? No		

General Information His	tory
Log Date	Event
10/12/18 16:33:57	Sorted to tray 40004 having status Image Save Failure during Incoming Scan
10/12/18 16:42:29	Moved during Incoming Scan WITH RESCAN (Check = 7)
10/12/18 16:43:33	Sorted to tray 40004 having status Image Save Failure during Incoming Scan WITH RESCAN
10/12/18 16:44:16	Sorted to tray 40004 having status Image Save Failure during Incoming Scan WITH RESCAN
10/12/18 16:45:44	Sorted to tray 40004 having status Image Save Failure during Incoming Scan WITH RESCAN
10/12/18 16:49:08	Sorted to tray 40001 having status Manual Verify during Incoming Scan
10/15/18 08:35:06	Sorted to tray 40001 having status Manual Verify during Incoming Scan WITH RESCAN
10/15/18 08:35:46	Mail piece was manually verified by operator.
10/15/18 08:35:51	Sorted to tray 10004 having status 4 during Incoming Scan WITH RESCAN
10/15/18 13:32:28	Challenge code GOOD received in File D:\Pitney Bowes\DATA \PBSigVarImport\10004.txt.
10 🗸 rows per pa	ge Page 1 of 2 <u>Go</u> <u>Next Last</u>

Note: If the ballot needs to be manually verified, a Manual Verify button will appear at the bottom left of the screen.

- 5. Check each page to find where the ballot has been and see if it has been deemed GOOD or if there are more steps needed.
 - a. Pocket 3 → envelopes are Double Feeds and they must be rerun through one at a time.
 Operator needs to disable the 'Double Detector' option prior to running the ballots through again.
 - b. Pockets 5 and 7-10 \rightarrow envelopes can be run together.
 - c. Pocket 6 \rightarrow envelopes must be run under a separate Re-Scan Mode incoming pass and kept together until they reach extraction.

Note: Refer to page 13 for a list of other potential issues.

)ptions Select	×
Standard	
Pass Type	
Argos Belia-Vote Incoming	
Relia-Vote Sort Test Hardware	
Pass Options	~
Close All Open Dynamic Pockets	
Disable Date Time Printing	
✓ Disable Double Detector	
Disable No Signature Detection	
Disable Over Under Measurements	

6. Check Pockets 47, 48, and the end bucket located at the bottom of the gray column commonly called the "End Bucket" to see if any ballot envelopes did not reach a pocket.



Ending the Pass

After the envelopes are finished being fed through the Ballot Sorter, we must perform a clean up to ensure all envelopes have been placed in their proper pockets. A variety of issues may occur, and they must be resolved before ending a pass.

Note: Operator will shout "Any Issues?" once the selected quantity has been run.

1. **Click** on Hold Magazine and Hold Feeder.



2. Open the covers over the track to see if any ballot envelopes fell off the track during the run.



Closing All Open Dynamic Pockets

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



- 3. Press **O** to open the dialog box and **check** "Close All Open Dynamic Pockets" box.
- 4. Press **OK** to print out Tray Tags for pockets with valid envelopes.

Options Select		×
Standard		
Pass Type Argos Relia-Vote Incoming Relia-Vote Sort Test Hardware		
Pass Options Close All Open Dynamic Pou Disable Date Time Printing Disable Double Detector Disable No Signature Detect Disable Over Under Measur Disable Stacker Skew Dete	ckets tion ements ction	*
Sort Scheme Incoming_Pass-25pc_2022-11-08 Incoming_Pass-50pc_2022-11-08		
Incoming Pass 2022-11-08 Genera	l Election OK	Cancel
Ready		15:52:41

5. Sweepers will pull out and separate the printed pocket tray tags.



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

Note: Be extra patient after gently pressing the button once. DO NOT turn off flashing lights until AVID's are properly verified for each of the pocket tray tags.



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



- 8. Verify the **first** and **last AVID** identify on the tray tag match the ballot envelopes in the tray for every valid pocket. It is very important that both the **first** and **last** numbers match.
- 9. After the tray tags print out and AVID's are all correct, **gently** hold down the button next to the flashing light until it stops flashing. Repeat for each pocket.
- 10. Sweepers will shout "Lights Out" to Machine Operator after all lights from both sides of the machine have been turned off.
- 11. Machine Operator will confirm before ending pass.

12. Then **Click** on End Pass.



13. Fill out the end time on the **Time Ended** column of the Incoming Verification Log, pieces ran, last tray and initials.

Incoming Verification Log								
Machine #: 4207								
Line	Time Started (New Pass)	Date Returned	Return Source	Time Ended (End Pass)	Pieces Ran	Quantity Trays Exported	Last Tray	
1		11						
2		/ /						
3		/ /						
4		11						
5		11						
6		11						
7		11						
8		11						
9		11						
10		11						
11		11						
12		11						
13		11						
14								
15		11						
16								
17		11						
18								
19								
20		1 1						

14. Sweepers must place the mail trays (with their tray tags) on the **Ready for Sort Pass** rack in numerical **Tray number** order.



Batch Control Log

- 1. Two Sweeping team members fill out the Batch Control Log.
 - a. One person will read the tray numbers.
 - b. The other will write them on the control log.





2. Sorting Lead will confirm with Machine Operator that both Incoming Verification Log and Batch Control Log match.

Note: Once Incoming Verification Log and Batch Control Log sheets matched then we go to Exporting Files

Exporting Files

Once all envelopes have been processed, (both machines MUST be finished running ballots) the signatures must be exported to DIMS for Signature Verification.

1. On the left-hand monitor, in Relia-Vote, navigate to **Relia-Vote** > **Tools** > **Signature Export**.



2. Click **Export** (this will take a few minutes to complete.)

Export Signatures for Manual Verification									
	Customer	SB	\checkmark						
	Election	3944	\sim						
	Export								

Note: When both machines are running, they must both be finished running envelopes before exporting signatures.

3. Once completed the Lead will place the Batch Control Log in the "*Ready to Upload*" slot on the triple hanging tray near the Data Workflow team.



4. While placing the batch log in the hanging tray, shout "**Ready to Upload**" loud enough for the Data Workflow Lead to hear.

Sweeper Duties

1. Move the Suspended envelopes to the SUSPD tray in the **Incoming (1st) Pass Challenges Rack**.



- 2. Place Pre-Challenged (pocket 11) envelopes in the Supervisor's Tray for further review.
- 3. Sweepers must double check all areas around the sorter machine, pockets, and end-bucket to ensure there are no envelopes left behind before closing all dynamic pockets.





- 4. Verify the first and last AVID's on the tray tag matches the first and last ballot envelopes in that tray.
- 5. After confirming the first and last AVIDs on the pocket tray tag and envelopes inside the tray, gently press and hold the button next to the flashing light until it is off.
- 6. After the valid pocket trays are verified, sweepers must place these trays on the empty **Ready for Sort Pass** baker's rack in numerical order by **tray number**.
- 7. Place a new, empty 2 ft. mail tray below each pocket.

8. Fill the Batch Control Log with return date, tray number, and return source.

			Elect	tion – Da	te						ſ	3	
I		Incomi	ng V	/erifi	cation	Log							
	Ĩ	Machi		420	7				4		05	1915	-
		wachi	ne #:	420	,				1	6		tion - Oalte	
Line	Time Starte (New Pass	ed Dat a) Retur	e ned	Return Source	Time Ende (End Pass	d Pieces Ran	Last Tray	Initial			Batch (Control Log	
1 2	9:00 am	07/17	/23	Mail	11:00 am	1000	13431	ED		(Date Returned	·	-	
3	1:00 pm	07/24	/ 23	Mail	3:00 pm	999	13450	ED		IN REVIE	W BATCHES	CHALLENG	ED BATCHES
4		1	1							Line Batch/Tra	y # Return Source	Batch/Tray# Sour	ce Challenge Type
6			1							2		_	
7		1	1							4			
8		1	1							5 7			
10		1	1							C 8			
11		1	1							10			
13			1							12			
14		1	1							15			
15		/	1							17			
17		1	1							39 20			
18		1	1							Sorter Staff Name:		Date Recorded:	
20			1							e Data			
Lead Sta Name:	aff Erm	an De Guz	man		Date: 0	7/24/20	023			Workflow Uploader:		Døte Uploøded:	
Lead Sta Name:		an De Guz	man	ا ؟ د	Date: 0	1/24/20)23 ec			Wyrkflow Upfoader:		Date Uploadelt	
Lead Sta Name:	Det	an De Guz	man	1 7 6	Date: 0	7/24/20 77/24/20)23 ec	1: EV	11/0	Workflow Upfoader:	СНЕ	Date Uploaded!	
Name:		an De Guz			oate: 0)23 ec	1: EV #	11/0	Workflow Upinader: 08/2022 A T eturn		S BCL A Ent	udit
Name:		an De Guz	man		Date: 0)23 ec	1: EV #	11/0			S BCL A Enti	udit
Lead St.		an De Guz	man	Re	ote: 0			1: EV #				S BCL A Enti	udit ry
Lead St.		an De Guz		Re	oate: 0	n/24/20		1: EV #	_11/0	eture		BCL A	udit ry
Lead Sti Name:		an De Guz ate		Re	oate: 0			1: EV #					udit ry
Lead St. Lead St. Name:		an De Guz ate			oate: 0			1: EV #		8/2022		BCL A Enti	udit ry
Lead St. Name:		an De Guz ate		Re IN	Date: 0			<i>t:</i> <i>EV</i> #	_11/0			BCL A Ent	udit ry]]]]]]
Lead St. Name:		an De Guz ate		Re	Date: 0			1: EV #				S BCL A Enti	udit ry]]]]]]

9. Sweeper or Sorting Lead Team Member will confirm the Batch Control Log with the Machine Operators Incoming Verification Log to ensure that Returned Date and Return Source match.

Note: When running both machines at the same time, trays need to be placed on the same Bakers rack according to tray sequence.

Authorization

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