



REGISTRAR OF VOTERS

# BlueCrest Vantage Sorter: Incoming (1<sup>st</sup>) Pass

PROCEDURE DOCUMENT – Version 4.0

De Guzman, Erman

7/18/2023

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# BlueCrest Vantage Sorter: Incoming 1<sup>st</sup> Pass

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## Scope

The purpose of Incoming 1<sup>st</sup> Pass is to import signatures into DIMS.net, the county's election management system, and to prepare envelope trays for Sort 2<sup>nd</sup> 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.

## Importing the .SIF File

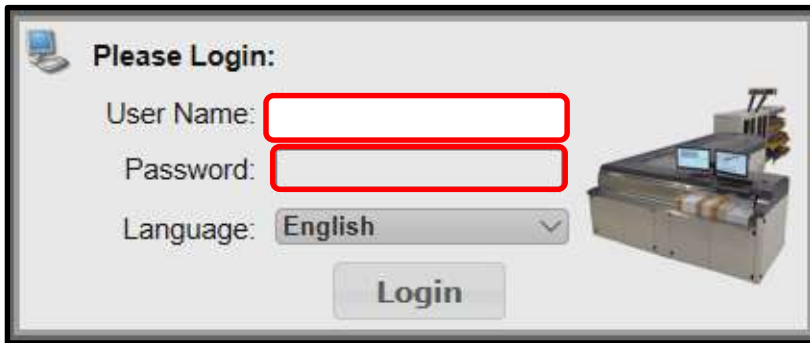
**Note:** Machine Operators must ask Data Workflow Lead to create a .SIF file prior to importing. See Data Workflow Procedure for reference.

In order to import the .SIF file:

1. From the left monitor desktop, double-tap the Mozilla Firefox icon to connect to Relia-Vote.

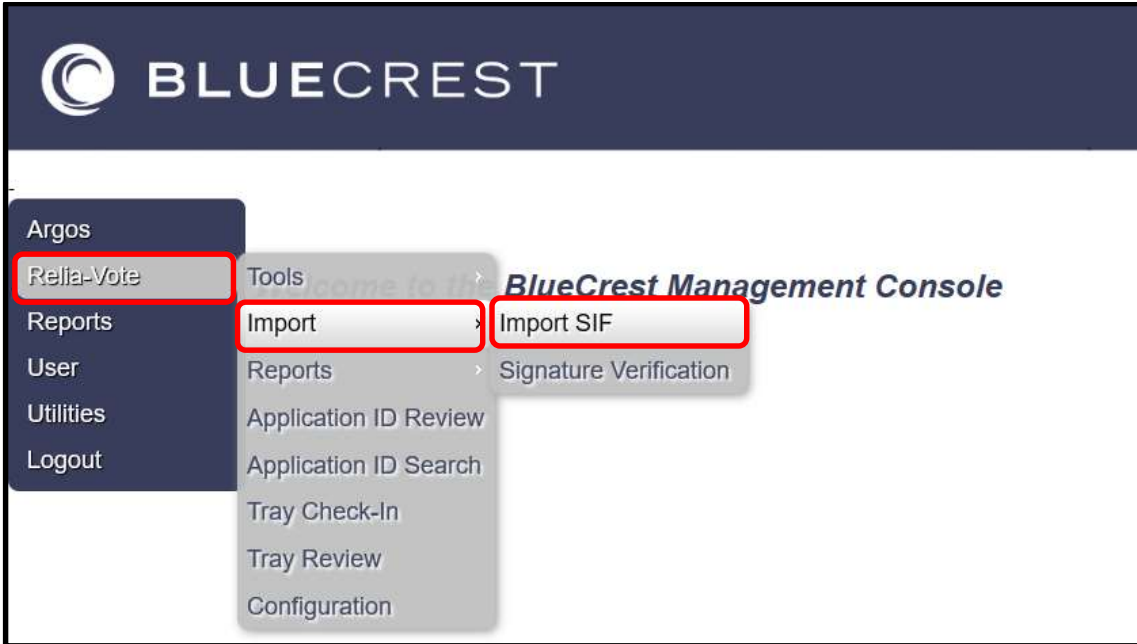


2. Using the keyboard, log in using your username and password.

A screenshot of the Relia-Vote login interface. The title is "Please Login:". There are three input fields: "User Name:" with a red rectangular highlight, "Password:" with a red rectangular highlight, and "Language:" with a dropdown menu set to "English". Below these fields is a "Login" button. To the right of the login fields is a small image of a ballot sorting machine.

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

1. Select **Relia-Vote**.
2. Select **Import**.
3. Select **Import SIF**.



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



5. 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 will help 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

**Machine #: 4207**

Line	Time Started (New Pass)	Date Returned	Return Source	Time Ended (End Pass)	Pieces Ran	Last Tray	Initial
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		/ /					
14		/ /					
15		/ /					
16		/ /					
17		/ /					
18		/ /					
19		/ /					
20		/ /					

<b>Operator/ Lead Staff Name:</b>	<b>Erman De Guzman</b>	<b>Date:</b>	<b>07/24/2023</b>
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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.

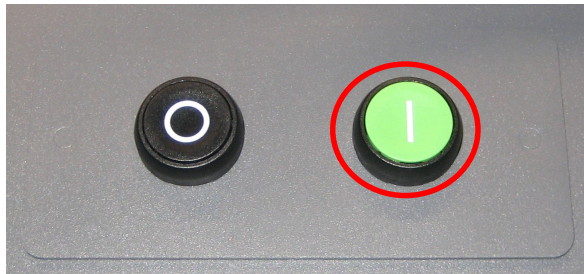
1. From the **Right Monitor** main screen, double tap the Transport Control icon.



**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).





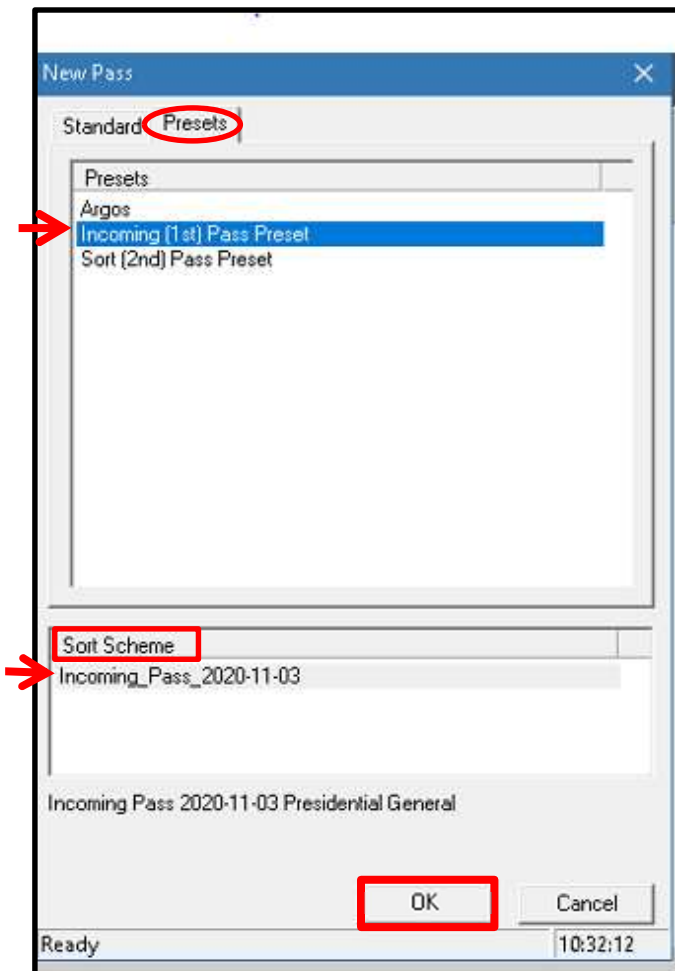
## Starting a pass

1. Click the New Pass button.



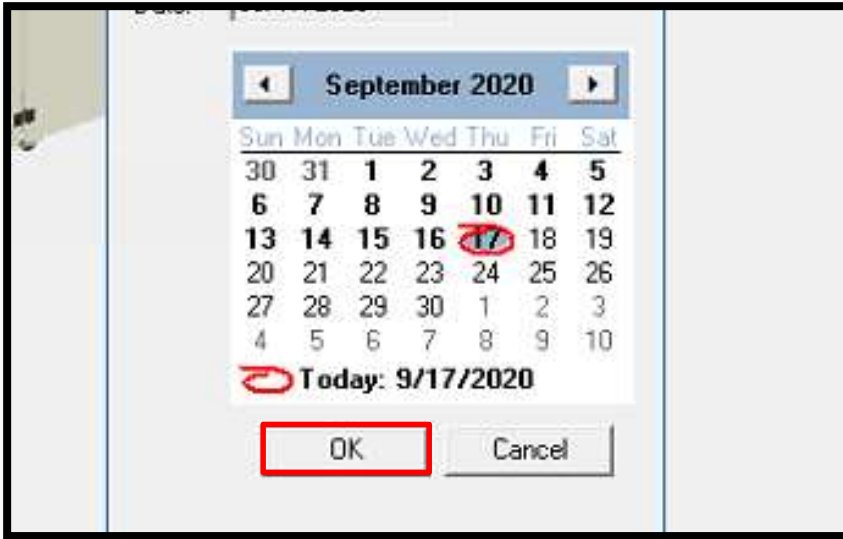
**Note:** A *New Pass* dialog box will appear.

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 (1<sup>st</sup>) Pass Preset**.
4. In the Sort Scheme field, select the **Incoming Pass** associated with the current election.
5. Select **OK**.



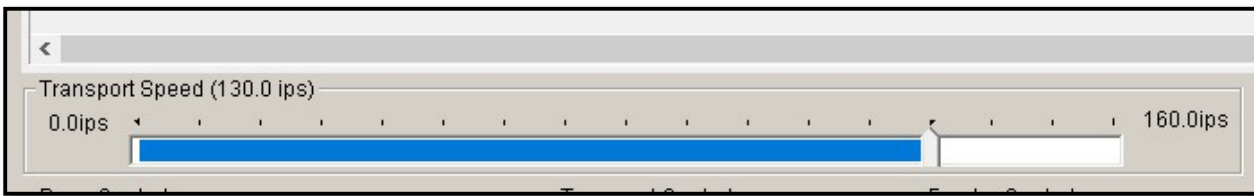
6. Select the **Return Date**.
7. Select **OK** to start the Incoming Pass.

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



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. With a second person, 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.



12. **Click** 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 **Return Source** associated with the batch of envelopes.



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.



## Sweeper Duties

1. Sorter must have two designated sweeping team members on each side of the machine.
2. 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. Every envelope from pocket 2 must be checked with a signature.
5. For the No-Voter Signature-1 (NVS-1) pocket, separate envelopes WITH signatures from the ones **WITHOUT signatures**
6. Place envelopes **Without signature** in the back of the tray, and envelopes with signatures on the red line in the front.

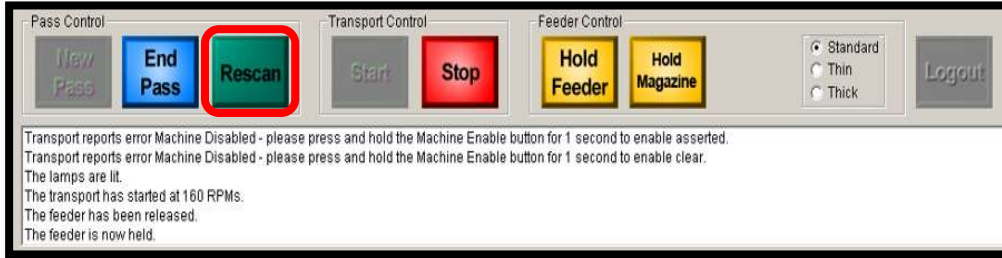
**Note:** If the ballot does have a signature, make sure to inform the operator so it can be re-run through the sorter machine.

7. Hand the envelopes WITH signatures to the machine operator to run through **ReScan** mode to reassign them to a valid pocket.
8. 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

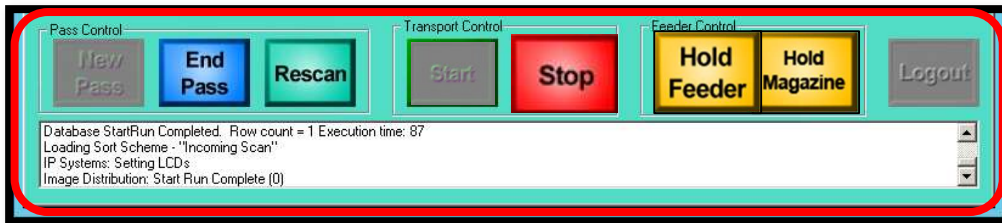
**Note:** Refer to page 14 for a list of other potential issues.

## Running Envelopes thru ReScan

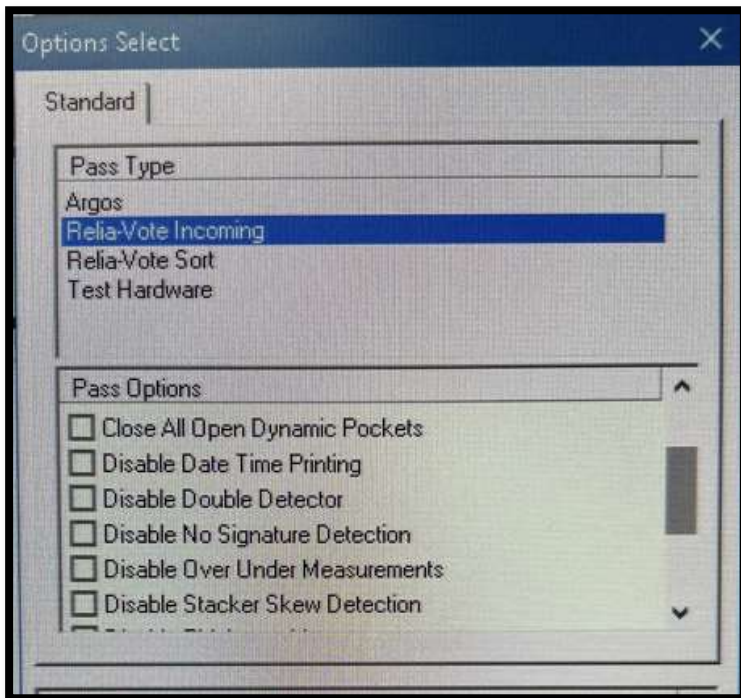
1. Tap on **ReScan**.



**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.
3. Only check the ones that are necessary for the issue **ReScan** that is being ran (see the section "Envelopes with Issues")





# Rescan Issues Incoming (1<sup>st</sup>) Pass Only

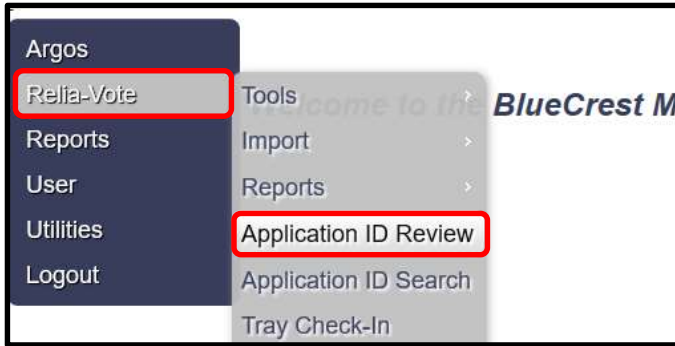
Pocket Numbers	Issues	Action (Rescan Mode)
1	Re-Scan	Run through in Re-Scan Mode
2	Manual Verify	Check with Supervisor
3	Double feed or multiple VBM Envelopes are scanned at the same time	<ol style="list-style-type: none"> <li>1. Disable Double Feed Detector</li> <li>2. VBM Envelopes from this pocket must be fed through the machine <b>one envelope at a time</b></li> </ol>
4	VBM Envelopes that are not signed ~ No Voter Signature	Envelopes <b>WITHOUT</b> signatures must stay in the back of the tray until the pass has ended and placed in the appropriate tray with its own Tray Tag with Returned Date and Returned Source.
	VBM Envelopes <b>WITH</b> signatures	Return to Machine Operator Disable " <b>No Signature Detection</b> " box
5, 6, 7, 8, 10	Random issues ~ example, VBM Envelopes are upside down	<ol style="list-style-type: none"> <li>1. Disable Over/Under Measurements</li> <li>2. Disable Stacker Skew Detection</li> <li>3. Disable Thickness Measurements</li> </ol>
9	Reject/Out of Scheme ~ Barcode issues ~ Incorrect Election Date	<ol style="list-style-type: none"> <li>1. Verify history of AVID in Relia-Vote (using the left monitor)</li> <li>2. Print AVID label and place it over barcode</li> <li>3. Previous Elections date is placed in the "Too Late" Mail tray</li> </ol>
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.

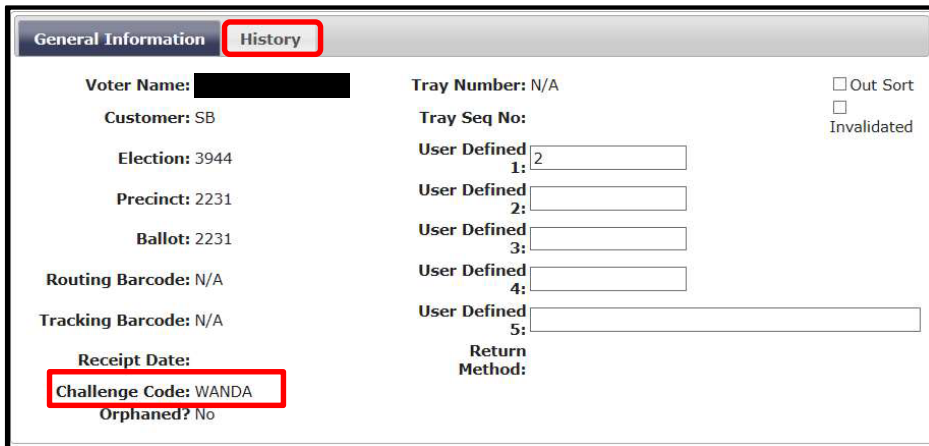
1. Select **Relia-Vote**.
2. Select **Application ID Review**.



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



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



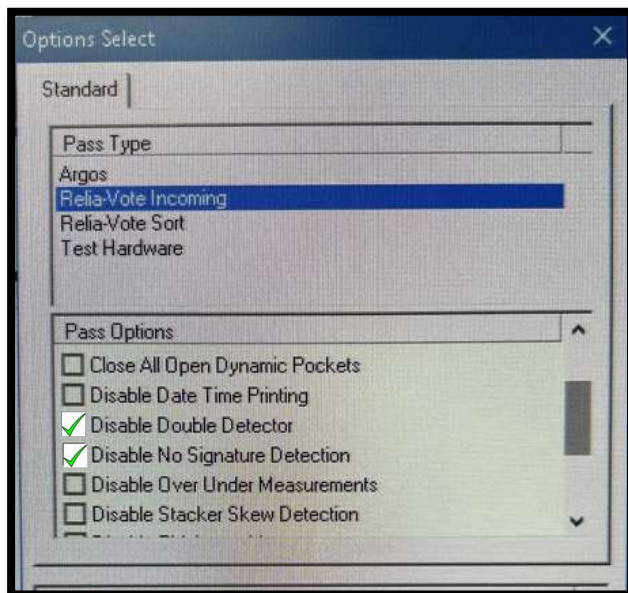
General Information	
History	
Log Date	Event
10/12/18 16:33:57	Sorted to tray 40004 having status Image Save Failure during Incoming Scan
10/12/18 16:42:29	Moved during Incoming Scan WITH RESCAN (Check = 7)
10/12/18 16:43:33	Sorted to tray 40004 having status Image Save Failure during Incoming Scan WITH 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 \PBSigVar\Import\10004.txt.

10 rows per page Page 1 of 2 Go Next Last

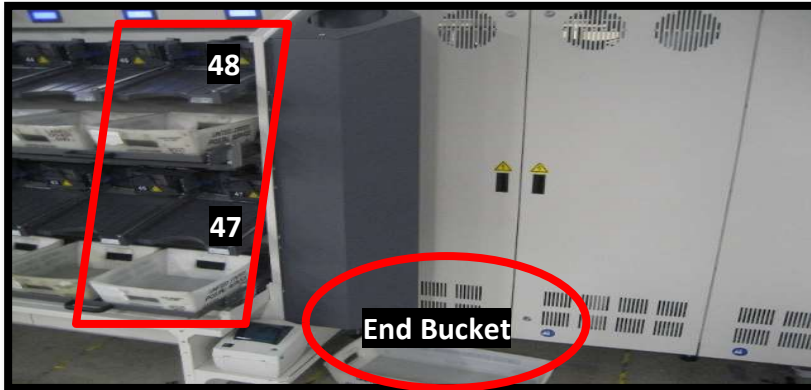
**Note:** If the ballot needs to be manually verified, a Manually Verify button will appear at the bottom left of the screen.

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. Envelopes from Pocket 4 need to be separated from envelopes with and without signatures. Operator needs to disable the 'No Voter Signature' option prior to running the ballots through again.
  - b. Envelopes from pocket 3 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.
  - c. All other envelopes from pockets 5-10 can be run together.

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



6. Check Pockets 47, 48, and the 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.



# Rescan Issues Incoming (1<sup>st</sup>) Pass Only

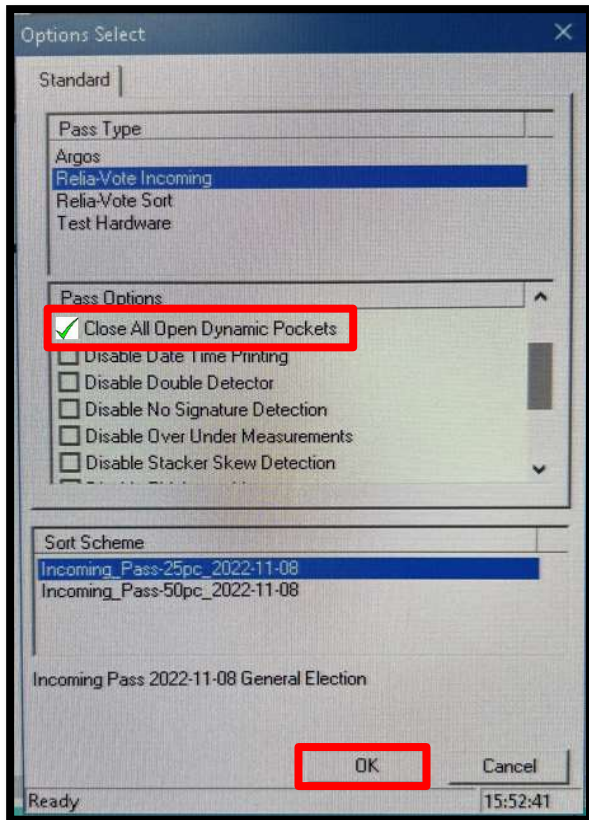
Pocket Numbers	Issues	Action (Rescan Mode)
1	Re-Scan	Run through in Re-Scan Mode
2	Manual Verify	Check with Supervisor
3	Double feed or multiple VBM Envelopes are scanned at the same time	3. Disable Double Feed Detector 4. VBM Envelopes from this pocket must be fed through the machine <b>one envelope at a time</b>
4	VBM Envelopes that are not signed ~ No Voter Signature	Envelopes <b>WITHOUT</b> signatures must stay in the back of the tray until the pass has ended and placed in the appropriate tray with its own Tray Tag with Returned Date and Returned Source.
	VBM Envelopes <b>WITH</b> signatures	Return to Machine Operator Disable " <b>No Signature Detection</b> " box
5, 6, 7, 8, 10	Random issues ~ example, VBM Envelopes are upside down	4. Disable Over/Under Measurements 5. Disable Stacker Skew Detection 6. Disable Thickness Measurements
9	Reject/Out of Scheme ~ Barcode issues ~ Incorrect Election Date	4. Verify history of AVID in Relia-Vote (using the left monitor) 5. Print AVID label and place it over barcode 6. Previous Elections date are placed in the "Too Late" Mail tray
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)

## 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 dialog box and **check** “Close All Open Dynamic Pockets” box.
4. Press **OK** to print out Tray Tags for pockets with valid envelopes.



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

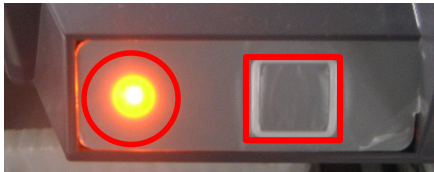


1. Place the pocket tray tag ticket for each pocket in the tray tag holder located outside of the mail tray.



2. Verify the **first** and **last AV\_ID#** 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.
3. 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 AV\_ID#'s are properly verified for each of the pocket tray tags.



4. After the tray tags print out and AV\_ID's are all correct, **gently** hold down the button next to the flashing light until it stops flashing. Repeat for each pocket.
5. Sweepers will shout "**Lights Out**" to Machine Operator after all lights from both sides of the machine have been turned off.
6. Machine Operator will confirm before ending pass.
7. Then **Click** on End Pass.



6. Fill out the End Time on the Time Ended column of the Incoming Verification Log, pieces ran, last tray and initials.

Presidential Primary Election – March 5, 2024

## 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		/ /					
2		/ /					
3		/ /					
4		/ /					
5		/ /					
6		/ /					
7		/ /					
8		/ /					
9		/ /					
10		/ /					
11		/ /					
12		/ /					
13		/ /					
14		/ /					
15		/ /					
16		/ /					
17		/ /					
18		/ /					
19		/ /					
20		/ /					

Operator /  
 Lead Staff  
 Name: \_\_\_\_\_

Date: \_\_\_\_\_

- Sweepers must place the mail trays (with their tray tags) on the “**Ready for Jogging**” 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.

A close-up photograph of a "Batch Control Log" form on a clipboard. The form is titled "Batch Control Log" and includes a "Date Returned:" field. It is divided into two main sections: "IN REVIEW BATCHES" and "CHALLENGED BATCHES". Each section has a table with columns for "Line", "Batch/Tray #", "Return Source", "Batch/Tray #", "Return Source", and "Challenge Type". The "IN REVIEW BATCHES" section has a numbered list from 1 to 20. At the bottom, there are fields for "Staff Name:", "Date Recorded:", "Data Workflow Uploader:", and "Date Uploaded:". The form is held by a silver metal clipboard.

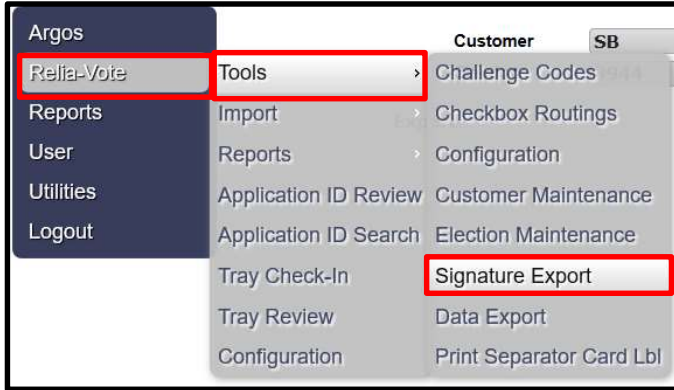
2. Sorting Lead will confirm with Machine Operator that both Incoming Verification Log and Batch Control Log match.

**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, select **Relia-Vote > Tools > Signature Export**.



Click on 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.



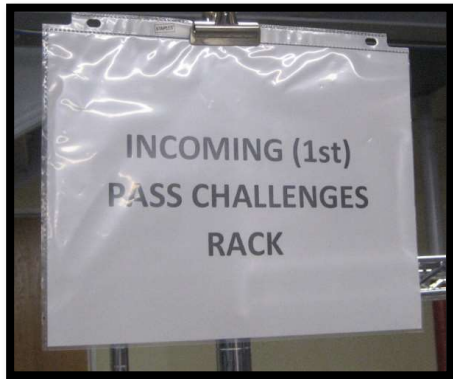
4. While placing the batch log in the hanging tray, shout **“Ready to Upload”** loud enough for the Data Workflow lead to hear.

## Sweeper Duties

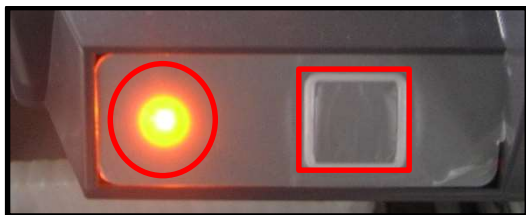
1. Move any No Voter Signature-1 (NVS-1) envelopes to the NVS-1 tray in the **Incoming (1<sup>st</sup>) Pass Challenges Rack**.

**Note:** Make sure that the tray has a No Voter Signature tray tag with the return date and source filled in, as necessary.

2. Move the Suspended envelopes to the SUSPD tray in the **Incoming (1<sup>st</sup>) Pass Challenges Rack**.



3. Place Pre-Challenged (pocket 11) envelopes in the Supervisor's Tray for further review.
4. 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.



5. Verify the first and last AV ID numbers on the tray tag matches the first and last ballot envelopes in that tray.
6. 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.

7. After the valid pocket trays are verified, sweepers must place these trays on the empty **“Ready for Jogging”** baker’s rack in numerical order by **tray number**.
8. Place a new, empty 2 ft. mail tray below each pocket.
9. Fill the Batch Control Log with returned date, tray number, and return source.

Election – Date

### Incoming Verification Log

Machine #: 4207

Line	Time Started (New Pass)	Date Returned	Return Source	Time Ended (End Pass)	Pieces Ran	Last Tray	Initial
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		/ /					
14		/ /					
15		/ /					
16		/ /					
17		/ /					
18		/ /					
19		/ /					
20		/ /					

Operator/Lead Staff Name: **Erman De Guzman** Date: **07/24/2023**

Election – Date

### Batch Control Log

Date Returned: **11/08/2022**

IN REVIEW BATCHES			CHALLENGED BATCHES		
Line	Batch/Tray #	Return Source	Batch/Tray#	Return Source	Challenge Type
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

Sorter Staff Name: \_\_\_\_\_ Date Recorded: \_\_\_\_\_  
 Data Workflow Uploader: \_\_\_\_\_ Date Uploaded: \_\_\_\_\_

**Date Returned:** \_\_\_\_\_

<b>IN REVIEW BATCHES</b>			
Line	Batch/Tray #	Return Source	BCL Audit Entry
1			<input type="checkbox"/>
2			<input type="checkbox"/>
3			<input type="checkbox"/>
4			<input type="checkbox"/>
5			<input type="checkbox"/>
6			<input type="checkbox"/>
7			<input type="checkbox"/>
8			<input type="checkbox"/>
9			<input type="checkbox"/>

10. 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

Document Owner: Ballot Department	Initiation Date: 05/02/2022
Version Number: 4.0	Date: 07/18/2023
Version Written By: Erman De Guzman	