



--REGISTRAR OF VOTERS

Data Workflow Processing

PROCEDURE DOCUMENT - Version 3.1

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08/23/2023

Data Workflow Processing

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Purpose

The purpose of this procedure is to guide users through updating the Mail Ballot Processing Database and maintain a consistent workflow of all mail ballot envelopes from their arrival to sorting, signature verification, auditing, slicing, and eventually, extraction. The procedure is designed to allow multiple steps from multiple sections to be performed simultaneously.

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 Data Workflow Leads and any other personnel assigned to updating the Mail Ballot Processing Database. This procedure covers all currently known scenarios.

Supplies Needed

- Computer with OPS drive access
- C:\Temp folder
- BlueCrest Relia-Vote Batch Processing Tool access
- DIMS.net Access w/ Miscellaneous Menu > Wanda access
- PB_to_DIMS folder access
- Disposition File Created stamp
- Batch Audit List
- Pen
- Highlighter
- Stapler

Verifying Data

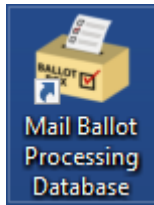
Whenever steps require the Data Workflow Lead to verify that data was printed, uploaded, or otherwise modified, you must work with the other Data Workflow Lead, or another person assigned to the task.

1. Data Workflow A: Read the data aloud.
2. Data Workflow B: **Highlight** the corresponding data on the paperwork.

When finished verifying data, both Leads will initial and date the paperwork.

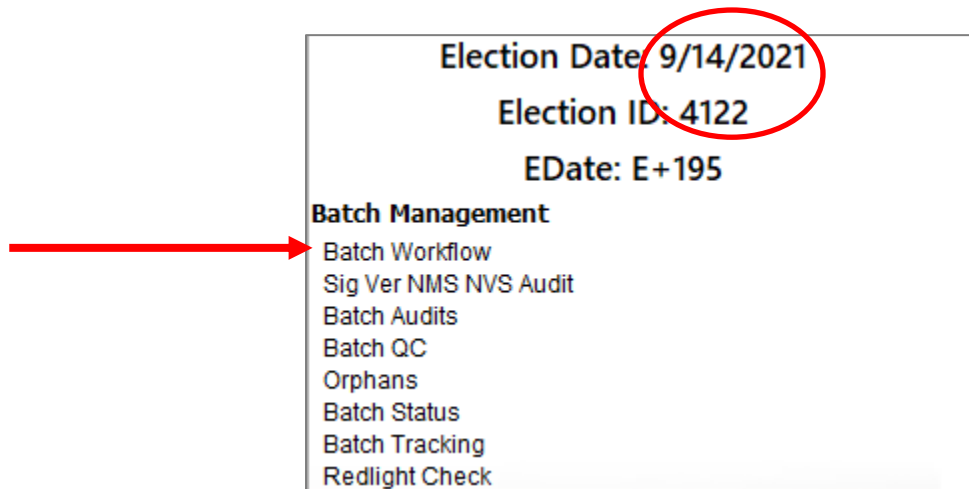
Setting up the Database and File Explorer Windows

Before starting the day's work, the Mail Ballot Processing Database (MBPD) needs to be opened and windows set up.



1. Double-click the MBPD icon.
2. When the database finishes loading, open the menu option for Batch Management then click Batch Workflow.

Note: Make sure the Election date and Election ID corresponds with the current Election.



You should see a window like the following appear.

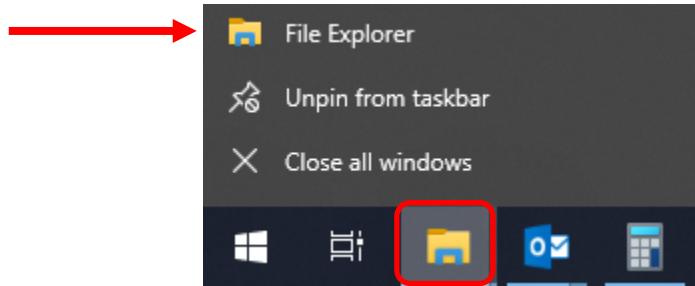
A screenshot of the "Batch Management" window. The window title bar shows "Batch Management" and "n Date: September 14, 2021 California Governorial Recall Election Election ID: 4122". The main content is a table with the following columns: "Batch Number", "Date", "Batch Type", "Return Source", "Uploaded to Dims", and "Election ID". The table contains 13 rows of data, all with "VALID" status and "MAL" return source.

Batch Number	Date	Batch Type	Return Source	Uploaded to Dims	Election ID
0	8/16/2021	VALID	MAL	Yes	4122
10001	8/16/2021	VALID	MAL	Yes	4122
10002	8/17/2021	VALID	MAL	Yes	4122
10003	8/18/2021	VALID	MAL	Yes	4122
10004	8/18/2021	VALID	MAL	Yes	4122
10005	8/18/2021	VALID	MAL	Yes	4122
10006	8/18/2021	VALID	MAL	Yes	4122
10007	8/18/2021	VALID	MAL	Yes	4122
10008	8/18/2021	VALID	MAL	Yes	4122
10009	8/19/2021	VALID	MAL	Yes	4122
10010	8/19/2021	VALID	MAL	Yes	4122
10011	8/19/2021	VALID	MAL	Yes	4122
10012	8/19/2021	VALID	MAL	Yes	4122
10013	8/19/2021	VALID	MAL	Yes	4122

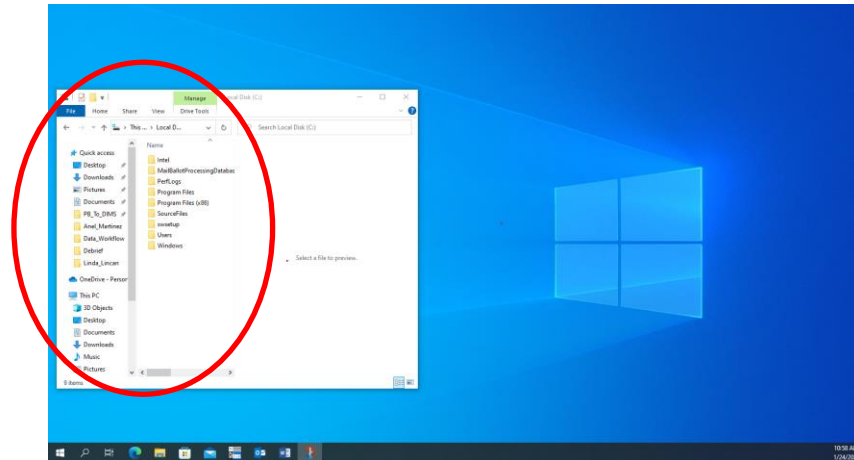
3. By clicking on the title bars of the windows, drag them to your left monitor and fill the screen.

Note: As a personal preference, you may switch the monitor that you place the database in, but for the purpose of introducing the database, follow the monitor choices presented.

4. Open the file explorer by right-clicking on the file explorer icon on the taskbar and selecting File Explorer. Perform this action two times so that two windows appear.



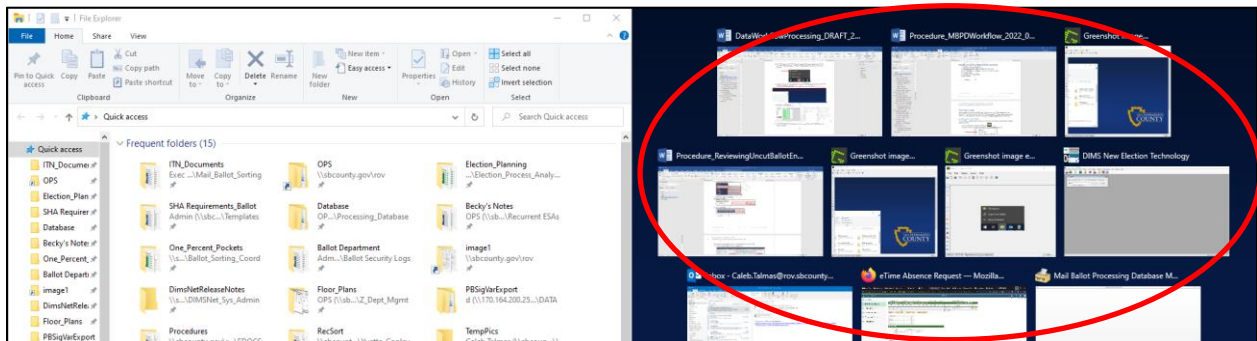
5. In the MBPD, click the BlueCrest menu, followed by the PB Out to DIMS menu option. This will create a third folder.
6. Using the left mouse button, drag the first window near the left, middle side of the right monitor until an auto-size shadow appears.



7. Release the left mouse button.

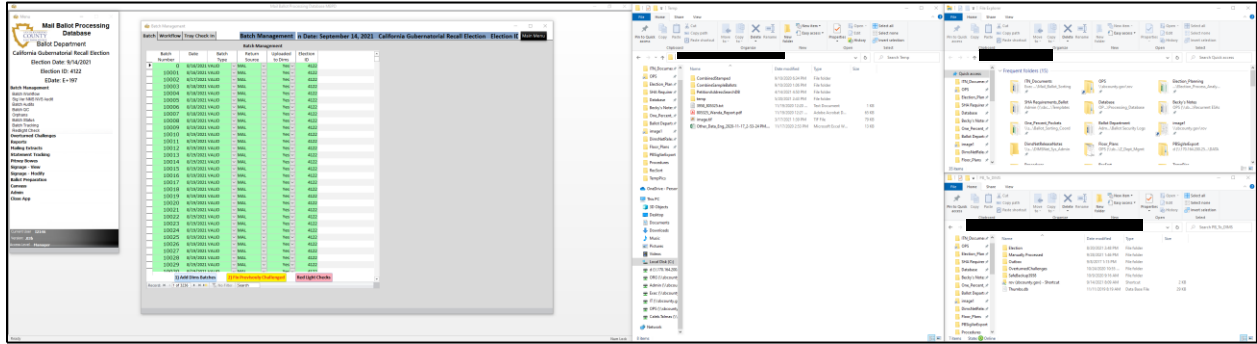
Note: The explorer window should now be taking up half the screen on the left side.

8. When the multi-window option shows up, press the **Esc** key on your keyboard.



9. Repeat this process with the second window, dragging it to the lower-right corner.
10. With the PB Out to DIMS folder, drag it to the upper-right corner.

Note: Your monitors should both look as follows.

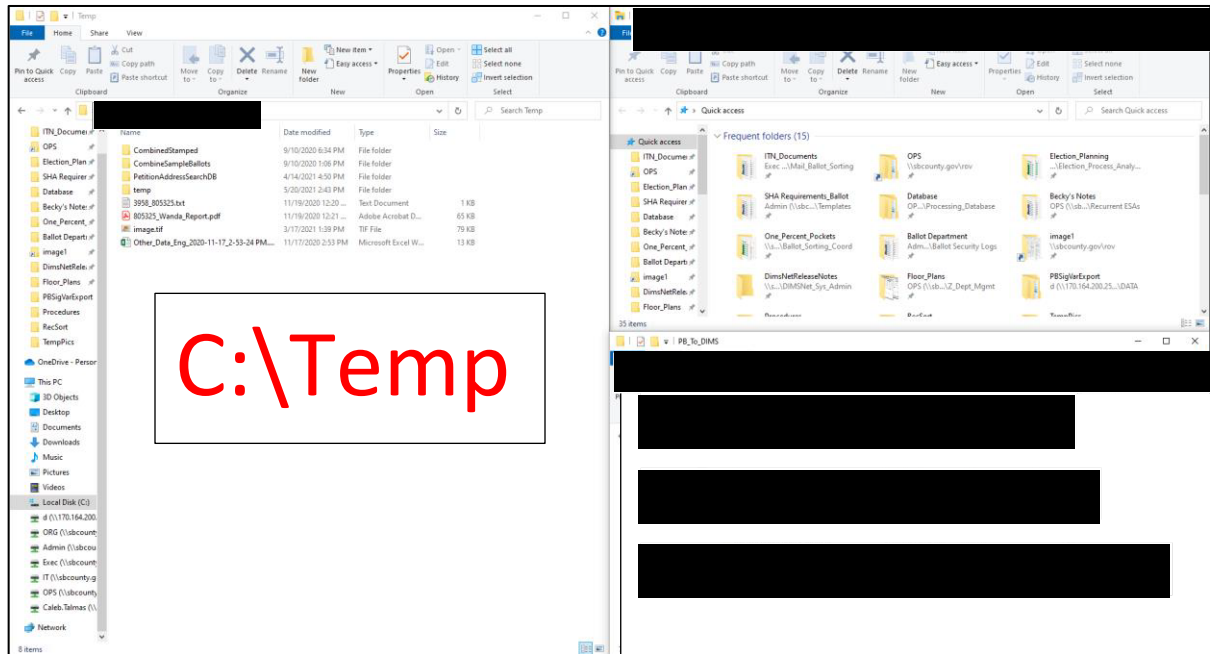


11. In the two other file explorer windows, navigate to the following locations:

- a. Left window: Local Disk C:\Temp

Note: If the folder does not exist, create a folder in the C: drive named "Temp"

- b. Lower-right window: [REDACTED]



Prior to Running the Incoming (1st) Pass

Before the machine operator can begin their first pass for the day, the Vantage Ballot Sorter must be updated with the latest voter information. This is done by a SIF file that is generated from the county's Intranet and BlueCrest applications.

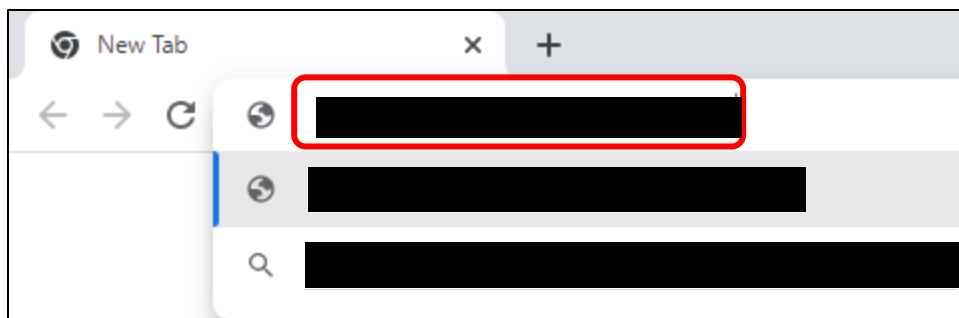
Generating a Sorter Information File (SIF)

The SIF file is generated using the county's Intranet and BlueCrest applications and must be sent to the RDS computer (Remote Diagnostic System) that the BlueCrest Vantage Sorters can update from.

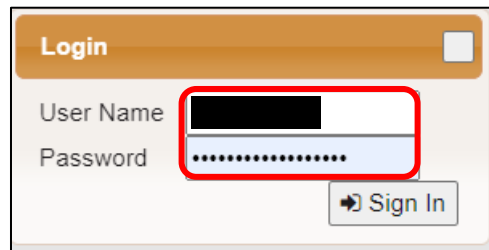
1. Open Microsoft Edge



2. Enter the following address into the URL bar: <https://rov-intranet.sbcounty.gov/>



3. Log into the Intranet page using your Windows username and password.
4. Press Sign In

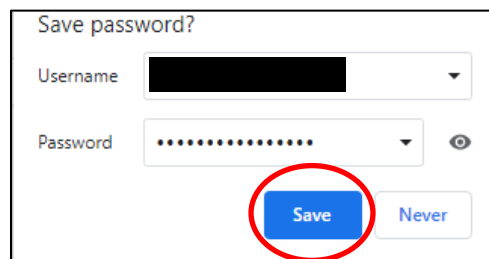


Login

User Name

Password

Note: If a pop-up asks you to save your password, click the **Save** button in the lower-right corner.



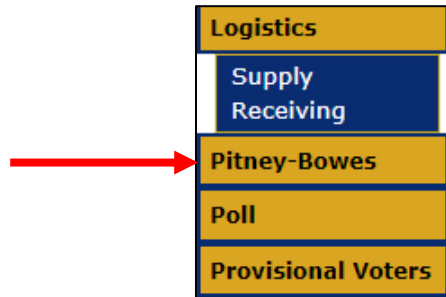
Save password?

Username

Password

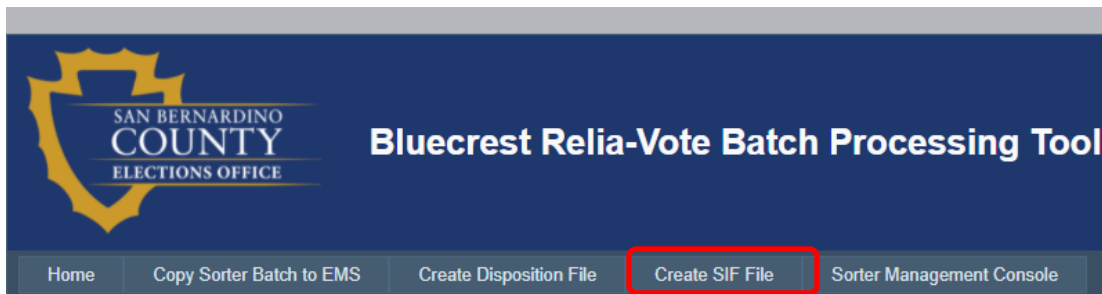
- From the menu on the left, select the Pitney-Bowes button.

Note: Pitney-Bowes is the original name for BlueCrest. This menu item will be renamed in the future.

A login form titled 'Sign in to access this site'. It includes a URL 'https://rov-vpsql.sbcounty.gov', fields for 'Username' and 'Password', and 'Sign in' and 'Cancel' buttons. The 'Sign in' button is circled in red.

Note: You will have to log in with your assigned username and password.

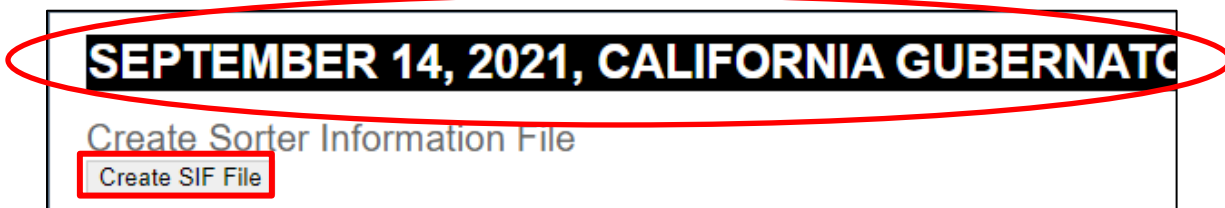
- On the BlueCrest Relia-Vote Batch Processing Tool page, click the **Create SIF File** menu button.



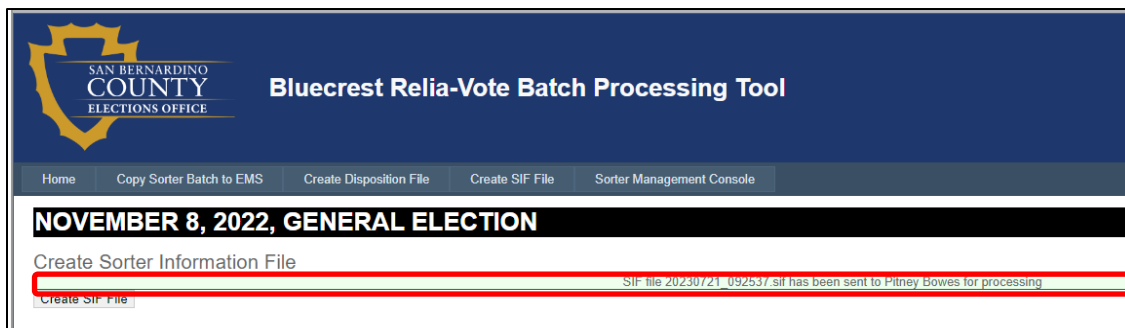
- On the new screen, click the **Create SIF File** button.

Note: Make sure that the election date and title are correct for the current election.

This process can take up to three minutes to complete and will show no signs of progress but will update when it has completed. Wait patiently while it generates and sends the file.



- Once the screen updates to indicate that the .SIF file was generated successfully, notify the Machine Operator.



Note: Keep your browser open. It will be used multiple times throughout this procedure.

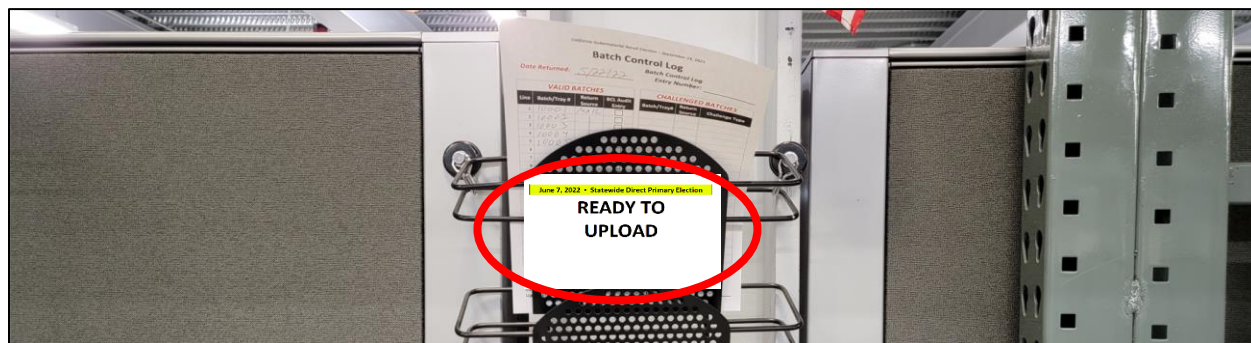
After the Incoming (1st) Pass is Complete

Once the Incoming Pass has finished and all issues on the Vantage Sorter machine are accounted for, the Data Workflow Lead is delivered a Batch Control Log, a sheet that lists what the return date and the return source of each of the envelopes are, as well as any potential challenge codes, such as No Voter Signature, Ballot Missing from Envelope, Multiple Ballots Returned, and so on. Since the data from these envelopes is not directly sent to the DIMS.net database, they must be uploaded into DIMS by the Data Workflow Lead as batches.

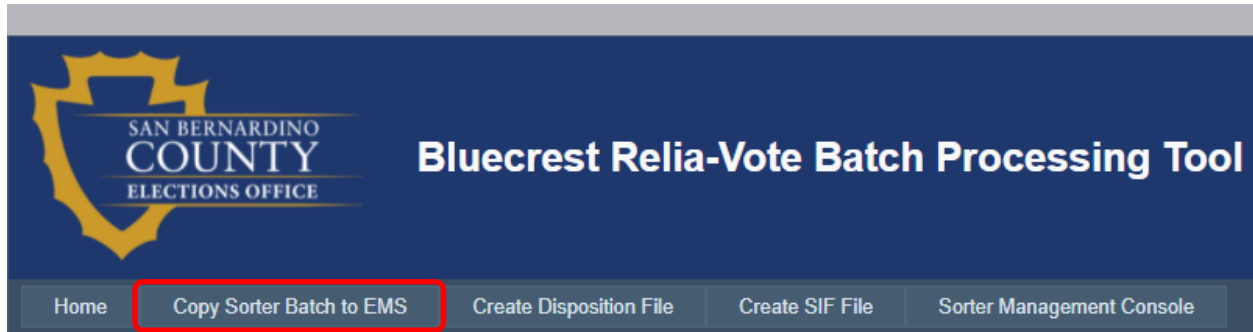
Transferring the Batches from BlueCrest to PB_to_DIMS

The Receiving and Sorting team will deliver the Batch Control Logs to the nearby hanging wall file. These must be processed immediately and carefully to ensure that Signature Verification continues their work. Care must be taken to avoid mistakes; they cost a lot of time and energy to correct.

- Retrieve the Batch Control Log from the *READY TO UPLOAD* hanging file.



- On the BlueCrest Relia-Vote Batch Processing Tool page, click the **Copy Sorter Batch to EMS** menu button.



- On the new screen, find and individually click the **Select** button for all batch numbers that correspond with the written numbers on the Batch Control Log. Audit with lead to verify you are selecting the right batches.

Note: If there are no batch numbers available, click the Refresh File List button. If the batch numbers still do not appear, confirm with the Machine Operator or Receiving and Sorting Team Lead that all batches have been exported. **Send files from Sorter to EMS**

Refresh File List

Select
Select
Select
Select
Select

10001.txt
10002.txt
10003.txt
10004.txt
10005.txt

California Governorial Recall Election – September 14, 2021

Send files from Sorter to EMS

Refresh File List rol Log

Date returned: 9/14/21 entry number: _____

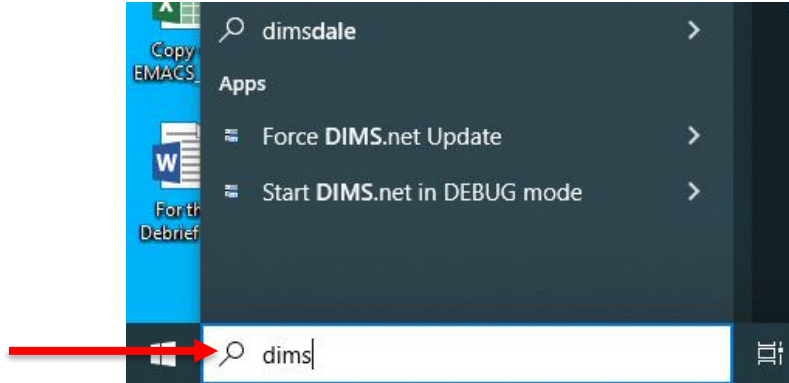
VALID BATCHES				CHALLENGED BATCHES		
Line	Batch/Tray #	Return Source	BCL Audit Entry	Batch/Tray#	Return Source	Challenge Type
1	10001	MAIL	<input type="checkbox"/>			
2	10002		<input type="checkbox"/>			
3	10003		<input type="checkbox"/>			
4	10004		<input type="checkbox"/>			
5	10005		<input type="checkbox"/>			

When the file has been properly transferred, there will be a message indicating “File [Batch].txt has been archived and staged for processing.” Repeat as needed until all batch numbers from the Batch Control Log have been transferred (One sheet at a time).

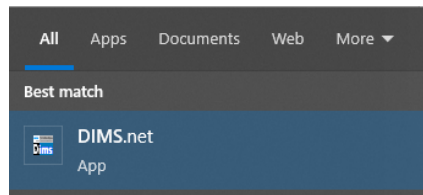
Importing the Batches into DIMS.net

Once the batches have been transferred from the BlueCrest servers to the PB_to_DIMS folder, they need to be uploaded into DIMS.net. Work only one Batch Control Log at a time.

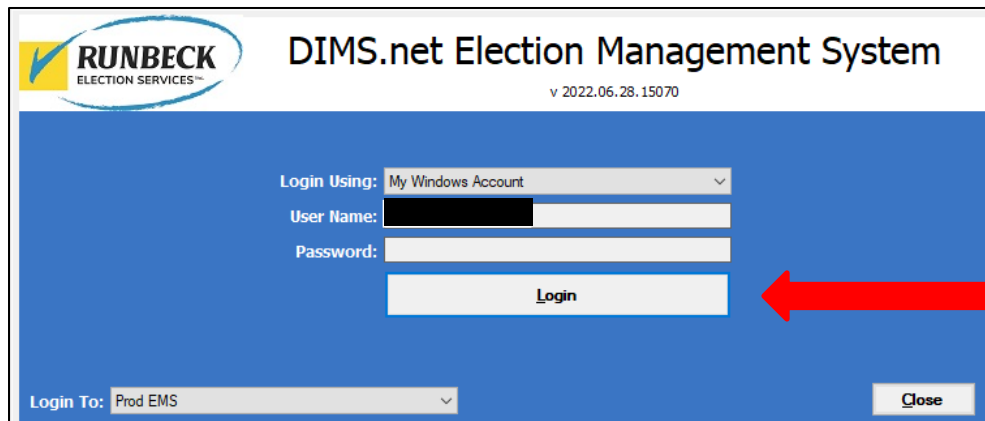
1. Go to window Search bar on the left hand corner of the Computer: type in Dims.net



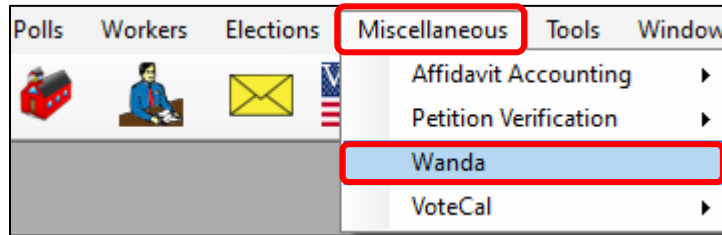
Note: This will appear



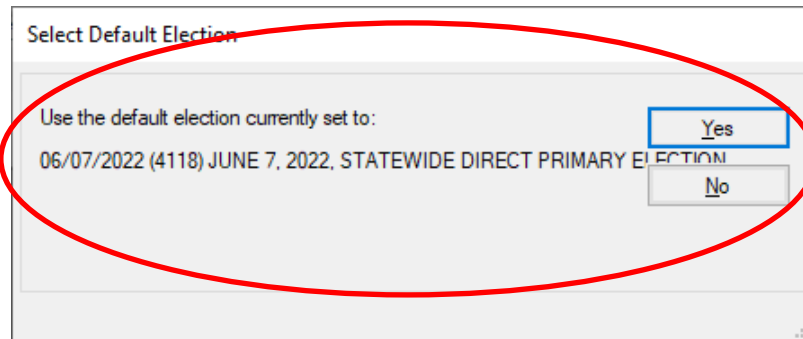
2. Make sure the Login Using field says "My Windows Account", then click the login button



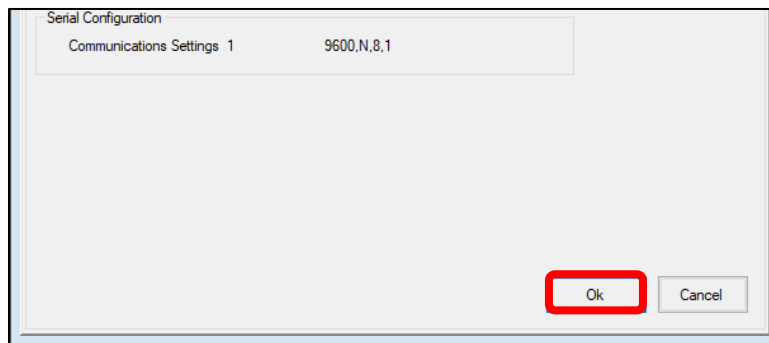
3. In DIMS.net, open the **Miscellaneous** menu and select the **Wanda** menu option.



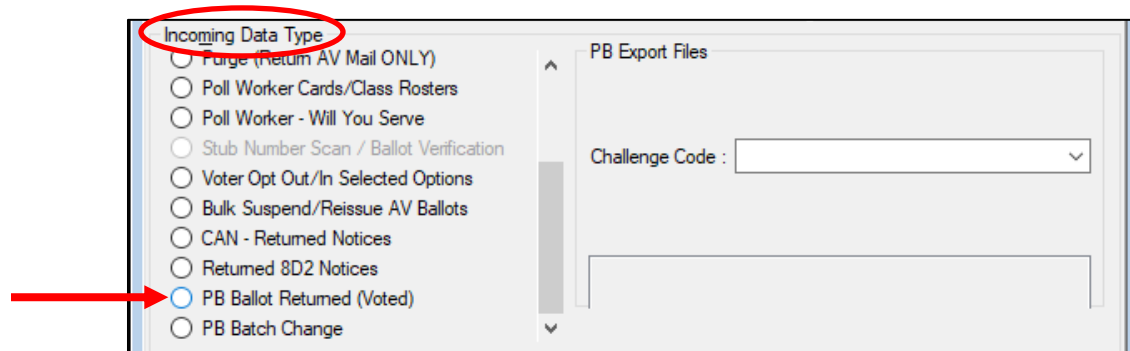
Note: If asked for the Default election, make certain that it matches the title and date of the current election before clicking **Yes**.



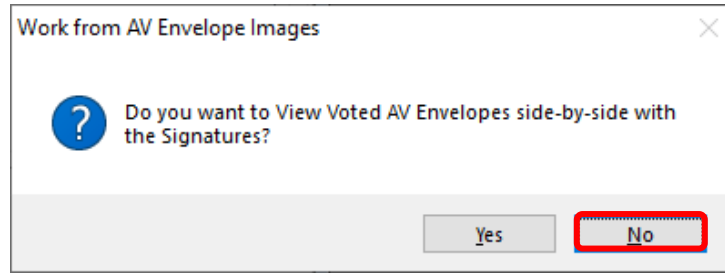
Note: The program may tell you to perform a configuration and place you on the *Configuration* tab. Click the **Ok** button to go to the *Wanda Upload* tab.



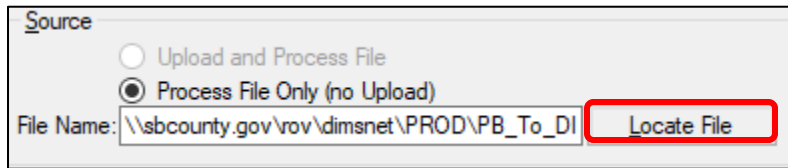
4. Under the Incoming Data Type field, scroll to and select PB Ballot Returned (Voted).



- When the Work from AV Envelope Images popup appears, click No.

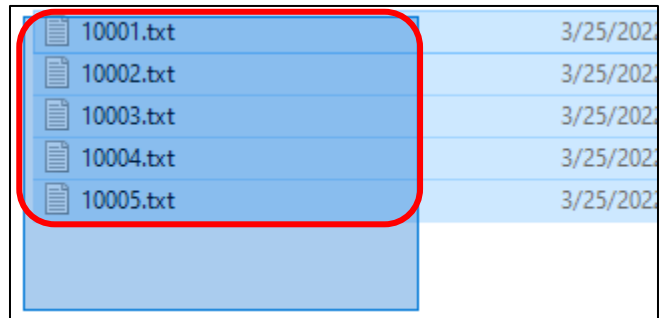


- Under Source, click the Locate File button.

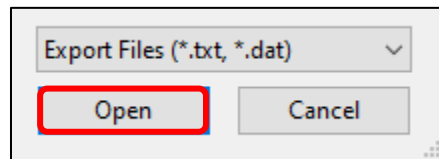


- In the *Select File or Files to Import* window, using your left mouse button, click shift and drag to select all the batches listed on the Batch Control Log. In case you have missing batch numbers from the sequence you can select a group at a time.

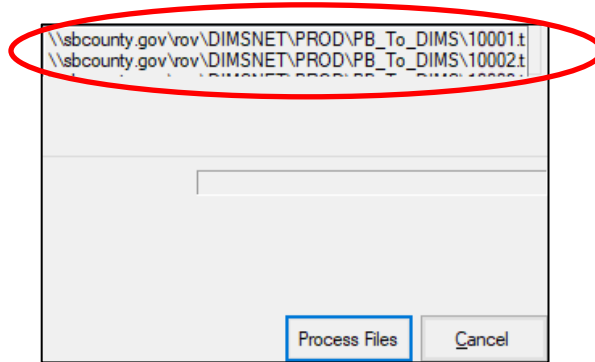
VALID BATCHES			
Line	Batch/Tray #	Return Source	BCL Audit Entry
1	10001	MAIL	<input type="checkbox"/>
2	10002		<input type="checkbox"/>
3	10003		<input type="checkbox"/>
4	10004		<input type="checkbox"/>
5	10005		<input type="checkbox"/>



- Click the Open button.

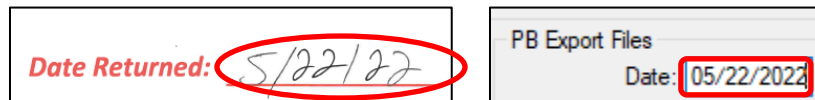


You should see the field on the right update with a list of file paths with batch numbers.



9. Under PB Export Files, change the following:

- a. In the Date field, change it to the *Date Returned* value from the Batch Control Log.



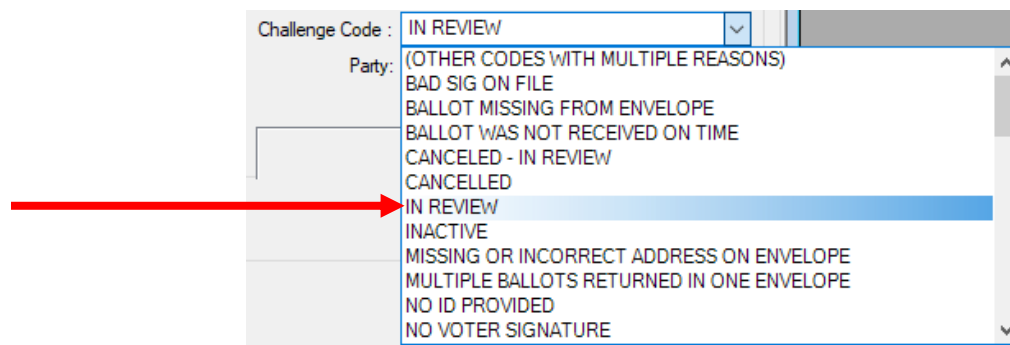
- b. In the *Return Source* drop-down, change the value to the *Return Source* from the Batch Control Log. Double check with the Sorting team member that all of this information is correct.

IN REVIEW BATCHES			
Line	Batch/Tray #	Return Source	BCL Audit Entry
1	10001	MAIL	<input type="checkbox"/>
2	10002		<input type="checkbox"/>
3	10003		<input type="checkbox"/>
4	10004		<input type="checkbox"/>
5	10005		<input type="checkbox"/>

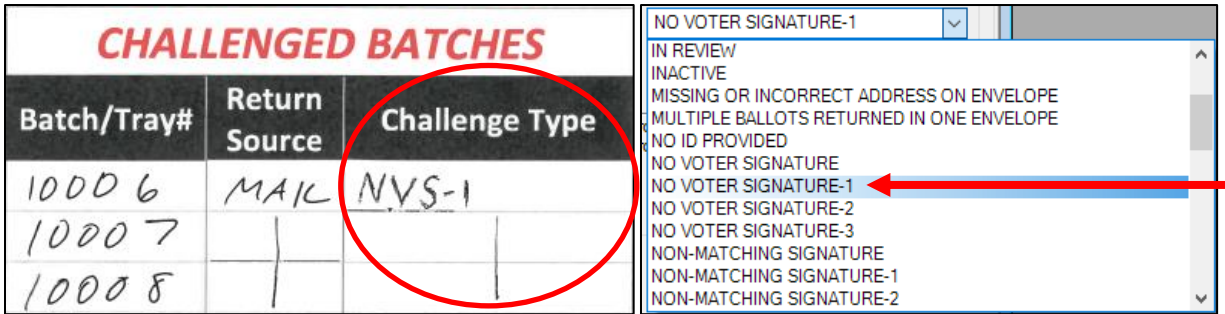
Return Source: MAIL

Challenge Code: POLLS
OFFICE
FAX
PARTY: EARLY VOTING SITE
DROP BOX
DROP OFF LOCATION
VOTE CENTER DROP OFF
MAIL
NON-DELIVERABLE
OTHER
TEST

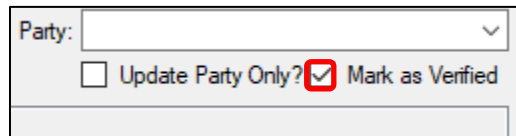
- c. In the Challenge Code field, change the value to **In Review**.



Note: If the Batch Control Log has its batches listed under the header “Challenged Batches”, instead put the Challenge Type listed (ex: No Voter Signature-1 [NVS-1]).

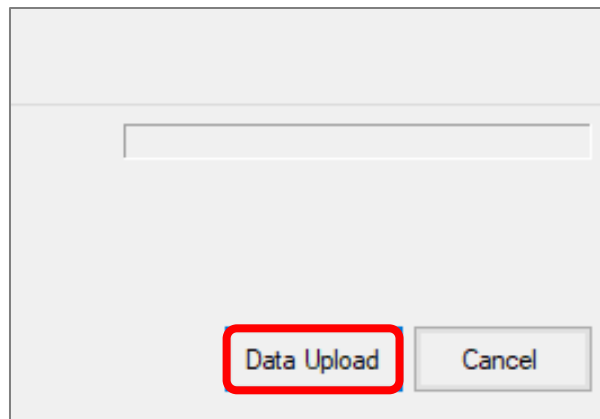


d. Check the checkbox that says **Mark as Verified**.

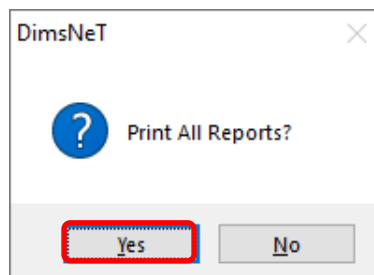


10. Verify with other lead that all information from the above steps matches with the Batch Control Log, then click the **Process Files** button.

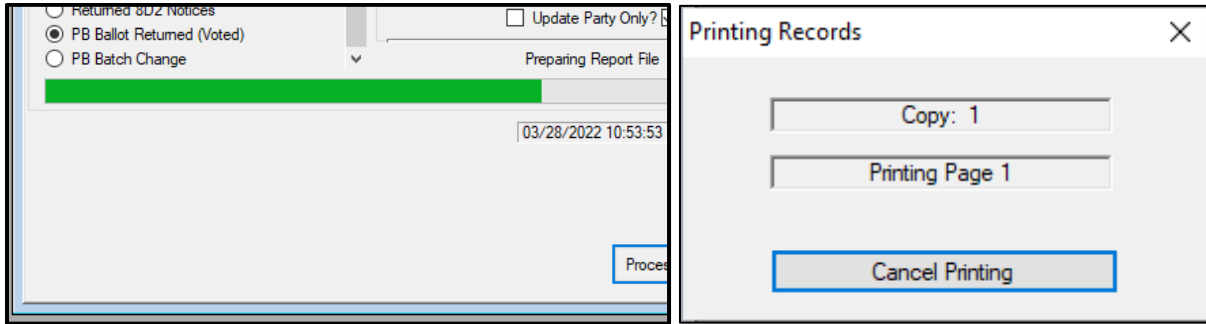
Note: It is important that you verify the information prior to clicking Process Files. Altering the data once it has been uploaded must be done on an envelope-by-envelope basis.



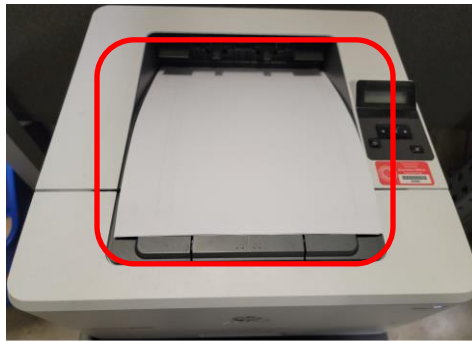
11. In the Dims Net window, click the **Yes** button.



This process may take a few minutes.



- Collect the printed Wanda Errors AV Return reports (known as Wanda reports) from the nearby printer (ROV 002955).



- Verify that all Wanda reports have printed for each of the batches on the Batch Control Log.

IN REVIEW BATCHES				Wanda Errors AV Returns	
Line	Batch/Tray #	Return Source	BCL Audit Entry	Batch Number:	
1	10001	MAIL	<input type="checkbox"/>	Batch Number:	10001
2	10002		<input type="checkbox"/>	Batch Number:	10002
3	10003		<input type="checkbox"/>	Batch Number:	10003
4	10004		<input type="checkbox"/>	Batch Number:	10004
5	10005		<input type="checkbox"/>	Batch Number:	10005

- Print your name and today's date on the Batch Control Log.

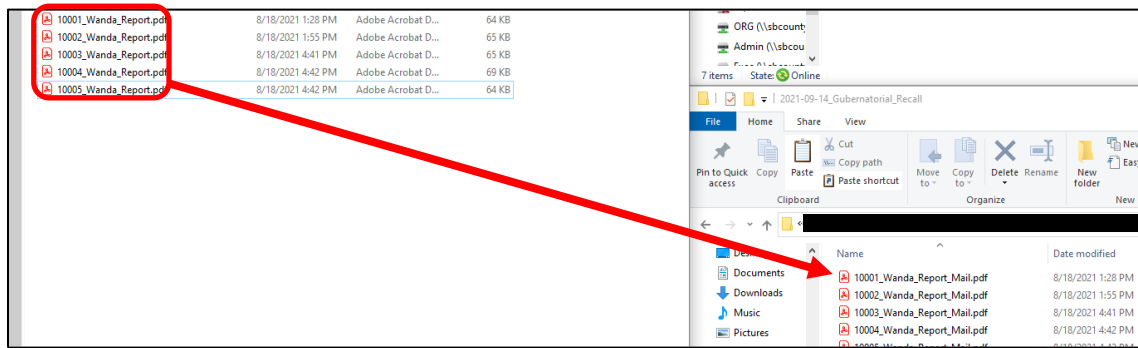
19	<input type="checkbox"/>				
20	<input type="checkbox"/>				
Sorter Staff Name: Reggie McDonald			Date Recorded: 5/22/22		
Data Workflow Uploader: Caleb Talmas			Date Uploaded: 5/22/2022		

15. In the C:\Temp folder, left click and drag the newly generated AVID files to the PB_to_DIMS folder (you may select and move multiple files at a time).



Note: This should move the files to the other folder, not just copy them. If they remain in the C:\Temp folder, delete the remaining copies. You can use the keyboard shortcut of Ctrl + X to select the files for cutting and Ctrl + V to paste into the respective folder.

16. In the C:\Temp folder, left click and drag the newly generated Wanda Report PDFs to the Wanda folder (you may select and move multiple files at a time).



Note: This should move the files to the other folder, not just copy them. If they remain in the C:\Temp folder, delete the remaining copies. You can use the keyboard shortcut of Ctrl + X to select the files for cutting and Ctrl + V to paste into the respective folder.

Updating the Mail Ballot Processing Database

Once DIMS has been updated and the files moved to their proper locations, the MBPD must be updated with the information about the batches that were uploaded. Because of certain limitations in DIMS, we must run certain reports to change the challenge codes automatically applied to certain Wanda batches.

1. In the MBPD/Batch Management window under the Batch tab, click the **Add Dims Batches** button.



You should see one or several batches appear in the list, along with the return source, return date, and challenge code it was uploaded as (VALID, if uploaded as In Review).

- Verify that the return source, return date, and challenge codes are correct by comparing the batch numbers in the database to the Batch Control Logs.

Date Returned: 5/22/22

10001	5/22/2022	VALID	MAL	1	10001	MAIL
10002	5/22/2022	VALID	MAL	2	10002	
10003	5/22/2022	VALID	MAL	3	10003	
10004	5/22/2022	VALID	MAL	4	10004	
10005	5/22/2022	VALID	MAL	5	10005	

Batches Uploaded as In Review

Once batches have been uploaded to DIMS, voters with a voter status of Cancelled, Inactive, or Fatal Pending must be segregated from the remaining voters by challenging their absentee ballots as Cancelled-In Review, Inactive, or Wanda Found a Problem, respectively. They will show up on Wanda Reports being challenged as In Review (INR). Please have both Leads initial the Wanda to make sure it was updated.

cat	source	date issued	error_type
P	MAIL		INR
VBM	MAIL		INR
P	MAIL		INR

- Click on the **Fix Previously Challenged** button.

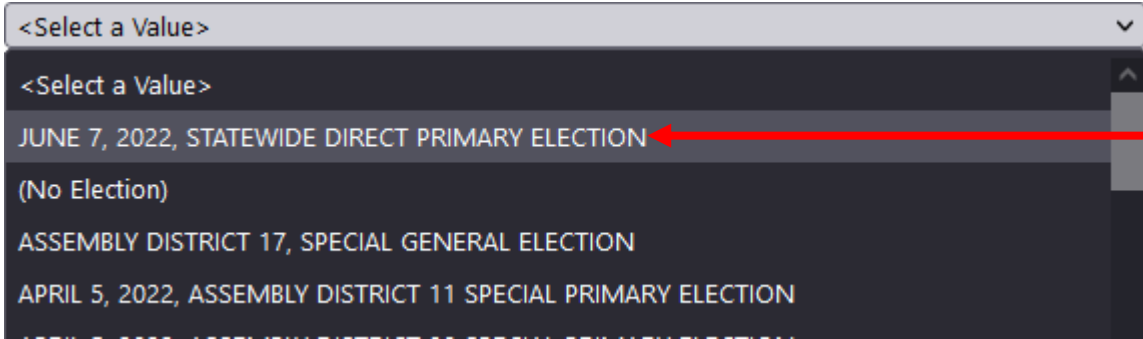


A new page should appear in your browser window.

Update Election

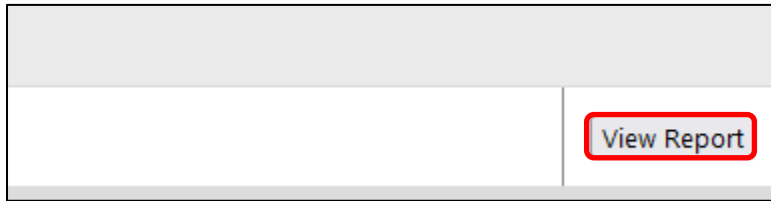
Clear Return Date Set Verified to No

- In the Election drop-down, select the current election.

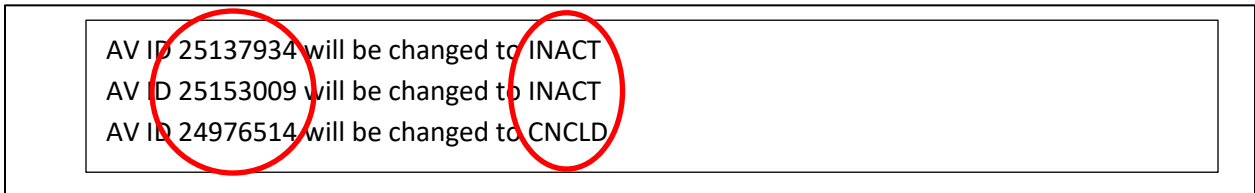


- Click the **View Report** button.

Note: Do not adjust any of the other drop-down options.

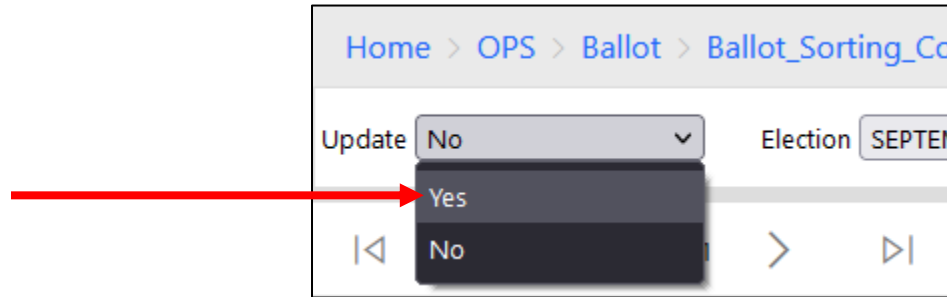


- Verify that the AV IDs listed on the page match the AV IDs listed (labeled as *raw data*) on the Wanda Reports.
- Verify that the challenge codes being applied match the status of the voter:
 - Status "I" = Inactive ("AV ID ##### will be changed to INACT")
 - Status "C" = Cancelled ("AV ID ##### will be changed to CNCLD")
 - Status "F" = Fatal Pend ("AV ID ##### will be changed to WANDA")



sequence	wanda_type	raw data	affidavit	status	name
138	AV Returns	25137934	96QB320674	I	FOREMAN, GEORGE
181	AV Returns	25153009	96TY966392	I	MAXIMOFF, WANDA
183	AV Returns	24976514	96UH100358	C	BONAPARTE, NAPOLEON

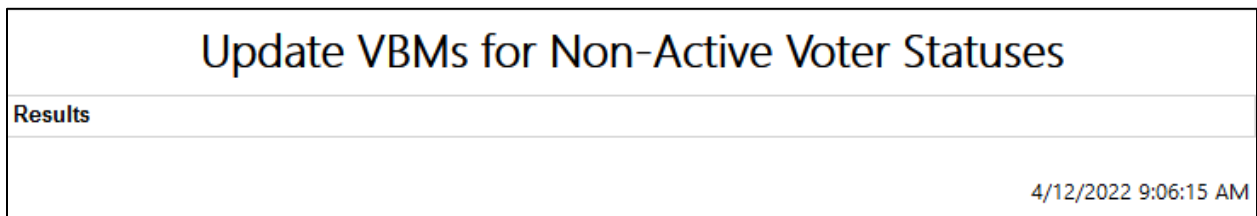
- Once all AV IDs and challenge codes have been verified, change the *Update* drop down to **Yes**.
Note: If you can't match the AV ID's that you printed with Wanda report in computer check with supervisor



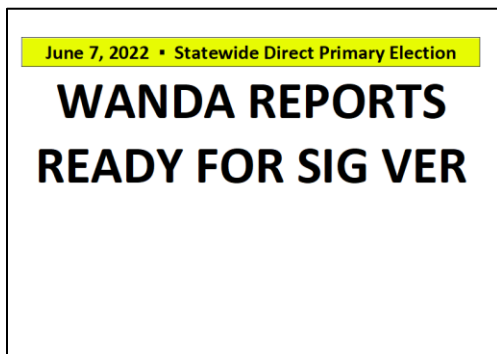
- Click the **View Report** button.



The results page should reload and appear empty. Don't forget to initial on the top right-hand corner your initials both leads, to the Wanda report with challenge code.



- Place the Wanda Reports in the *Wanda Reports Ready for SigVer* hanging basket. Shout out "Wanda Reports ready for Sig Ver" It is very important for them to know the Wanda's are ready to be worked on right away.



Batches Uploaded as Other Challenge Codes

Certain envelopes may be out sorted by the ballot sorting machine for not having a signature, for seemingly having no ballot inside, for not arriving on time, or a written notification appearing on the envelope (this list is not everything). The Wanda reports for these envelopes are technically complete and should be processed accordingly.

1. If you get challenged batches on the Batch Control Log, Write the challenge code onto the Wanda report for those batches, along with your initials and today's date.

CHALLENGED BATCHES		
Batch/Tray#	Return Source	Challenge Type
10006	MAIL	NVS-1
10007		
10008		

Wanda Errors AV Returns R001.03

Run Date: [REDACTED] E
 Drop Date: [REDACTED] E
 Login: [REDACTED] Batch Number: 10142

sequence	trans_type	run_date	affiliate	state	count	cat	source	date_tstamp	error_type
101	AV Returns	12/20/21	DEMOCRAT	C	1	P	MAIL	12/20/21 12:00:00AM	INT

ADD Total

INT 1

Total 200

NVS-1

CT

5/18/22

2. Place the completed Wanda report in the gray bin labeled *Wanda Reports Completed*.
Note: DO NOT staple WANDA Reports together!

June 7, 2022 • Statewide Direct Primary Election

WANDA REPORTS COMPLETED

After Signature Verification

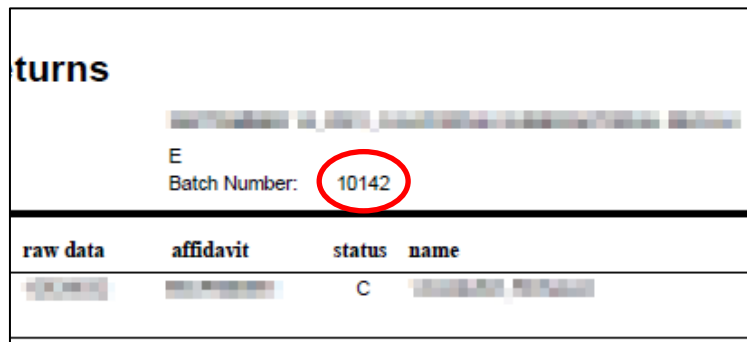
Once the Signature Verification team has completed their Wanda reports, the status of the envelopes must be uploaded to the Vantage mail ballot sorting machines, batches must be grouped under letters for easier auditing, and a Sort Pass report must be generated so that the Receiving and Sorting team can continue the progression of the envelopes to the Extraction or Challenged Ballot area.

Processing a Batch's Disposition File

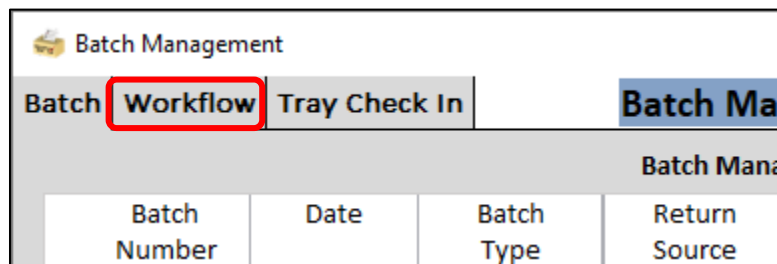
Disposition files update the BlueCrest database about the status of each individual envelope, whether it is valid or challenged. The Signature Verification team will complete Wanda reports throughout the day and place them into nearby hanging wall files with the sign *Wanda Reports Ready for Disposition*.



1. Collect the Wanda reports from the hanging wall file.
2. Locate the Batch Numbers at the top of each of the Wanda Report pages.



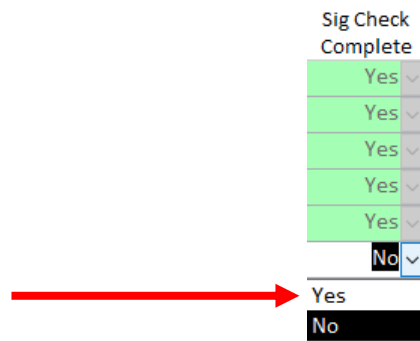
3. In the database, switch to the Workflow tab.



- Scroll and locate the batch file in the list. If you should have a file in QC please ask a Lead or Supervisor from Signature verification to release.

10137	5/22/2022	VALID	MAL	Yes	Yes	Yes	Yes	Yes
10138	5/22/2022	VALID	MAL	Yes	Yes	Yes	Yes	Yes
10139	5/22/2022	VALID	MAL	Yes	Yes	Yes	Yes	Yes
10140	5/22/2022	VALID	MAL	Yes	Yes	Yes	Yes	Yes
10141	5/22/2022	VALID	MAL	Yes	Yes	Yes	Yes	Yes
10142	5/22/2022	VALID	MAL	No	No	No	No	No
10143	5/22/2022	VALID	MAL	Yes	Yes	Yes	Yes	Yes
10144	5/22/2022	VALID	MAL	Yes	Yes	Yes	Yes	Yes
10145	5/22/2022	VALID	MAL	Yes	Yes	Yes	Yes	Yes

- In the *Sig Check Complete* column, change the drop down from **No** to **Yes**.

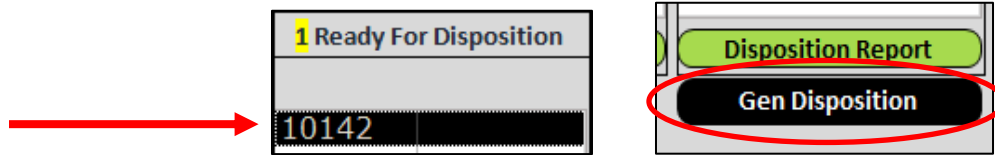


In the list boxes down below, the batch number should have moved from the *Ready to Sig Ver* list box to the *Ready for Disposition* list box.

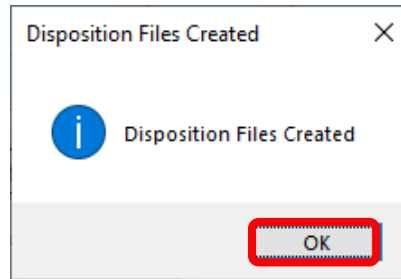
0 Ready to Sig Ver	1 Ready For Disposition
	10142

- Repeat this process for all Wanda reports.

- Select the batch numbers from the Wanda reports in the *Ready for Disposition* list box and then click the **Gen Disposition** button at the bottom.

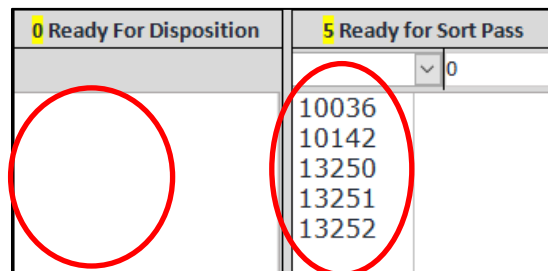


- In the *Disposition Files Created* popup, click OK.



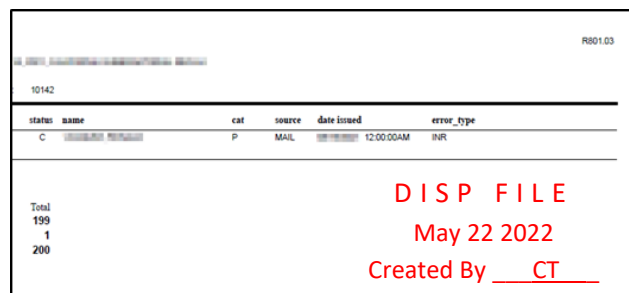
In the list boxes down below, the batch numbers should have moved from the *Ready for Disposition* list box to the *Ready for Sort Pass* list box.

Note: If you are having trouble with batches not moving over, close out and re-open the database.



- On the printed Wanda reports, stamp them with the Disposition File Created stamp and initial them.

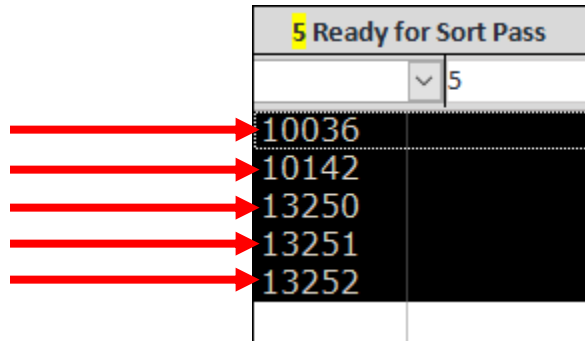
Note: If there is a date setting on the Disposition Created stamp, make sure it is set to today's date. They are to be put in a Gray Bin where all the Wanda's are at complete.



Grouping Batches and Building a Sort Pass

Once several batches have had their disposition files created (this number will vary), the envelopes must be sent through the Vantage ballot sorter. To do so, a *Sort Pass Report* must be generated, and the trays approved for travel through the machine.

1. In the database, select from 10 to 30 batches in the *Ready for Sort Pass* list box.



Note: Make certain that the total number of envelopes across all batches do not go over 3,200 pieces. The machine has a maximum capacity for its pockets and this number will allow for a large number of envelopes without hitting that capacity.

sequence	wanda_type	raw data	affidavit	status	name
ADD				Total	200
Total					200

2. In the drop down under *Ready for Sort Pass*, select the next available letter that has not been used today. In case you run out of the whole alphabet you are able to use Double letters if necessary (but first ask Supervisor)

EXAMPLE of Batch Audit list

5 Ready for Sort Pass

5

A

B

C

D

E

F

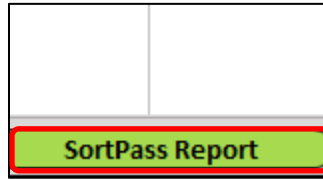
Batch Audit Letter Daily Checklist

Date: _____

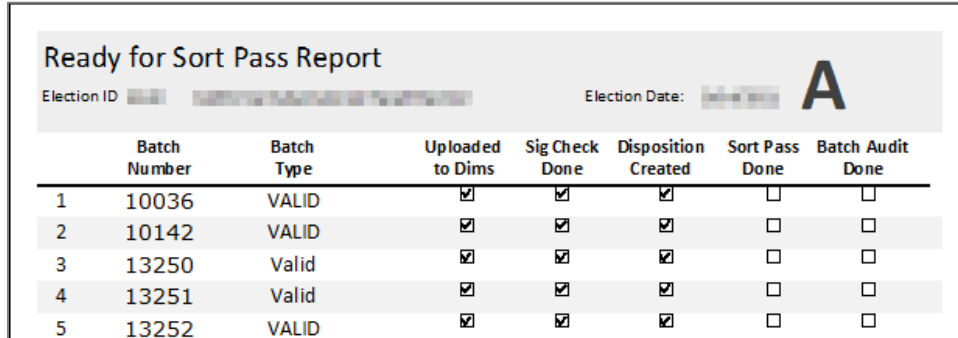
Initial next to the letter used.

<input checked="" type="checkbox"/> A <i>A.N.</i> _____	<input type="checkbox"/> N _____
<input type="checkbox"/> B _____	<input type="checkbox"/> O _____
<input type="checkbox"/> C _____	<input type="checkbox"/> P _____
<input type="checkbox"/> D _____	<input type="checkbox"/> Q _____

3. Click the **Sort Pass Report** button.



After a few moments, a *Ready for Sort Pass Report* will appear.



Ready for Sort Pass Report

Election ID: [REDACTED] Election Date: [REDACTED] **A**

	Batch Number	Batch Type	Uploaded to Dims	Sig Check Done	Disposition Created	Sort Pass Done	Batch Audit Done
1	10036	VALID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	10142	VALID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	13250	Valid	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	13251	Valid	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	13252	VALID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note: MBPD May glitch in case this happens please logout of the system, log back on and verify you have all the batch numbers on your report.

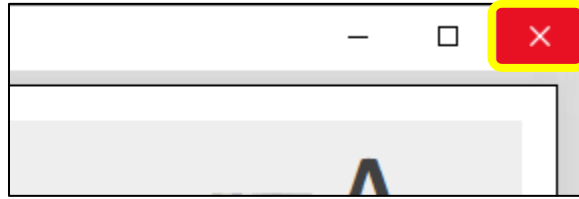
4. Press Ctrl + P to print the Sort Pass Report and collect it from the printer.

Note: Make sure that you have printed the Sort Pass Report before closing it. The batches will need to be backed out individually if the window is closed without printing the report. Speak to your supervisor if this happens.

5. Compare the batch numbers on the Sort Pass Report to the Wanda reports to verify that they all have Disposition File Created stamps, then place those completed Wanda reports in the gray bin labeled *Wanda Reports Completed*. **Audit with Data Workflow Lead**



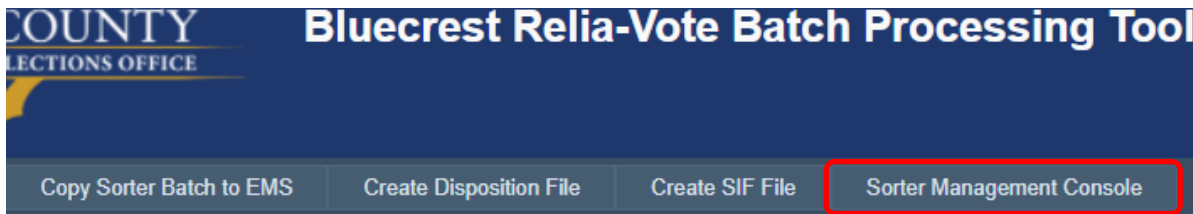
6. Close the Sort Pass Report window.



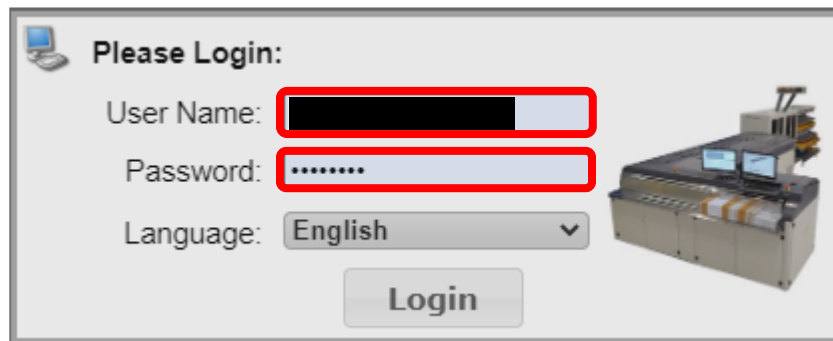
Using Relia-Vote to Prepare the Batches for Sort Pass

Prior to the envelopes being run through the Vantage ballot sorter, the batches must be recognized by the Relia-Vote system. The batches must be updated in the Signature Verification Import function.

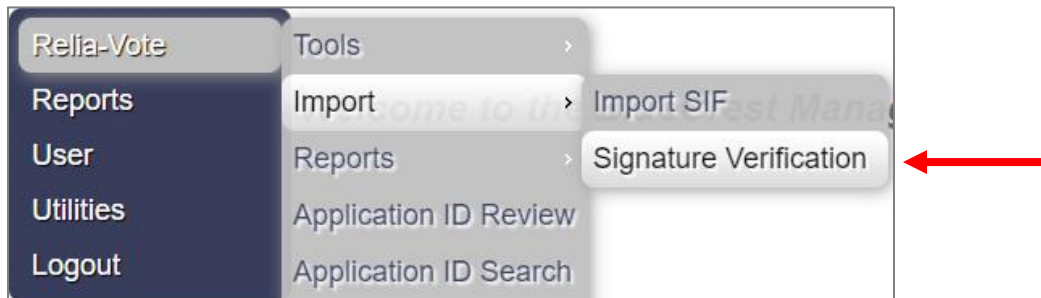
1. In your browser, click the Sorter Management Console button.



2. In the *Please Login* popup, enter "Operator" for the *Username* field and "Operator" for the *Password* field.
3. Press the Enter key.



4. In the new screen, hover the mouse cursor over the *Relia-Vote* menu, hover over the *Import* submenu, and then click on the **Signature Verification** option.



5. In the *Signature Verification File Import* table, check the box for each batch number listed under the Sort Pass Report. **Audit with Data Workflow Lead**
6. Click the Import button.

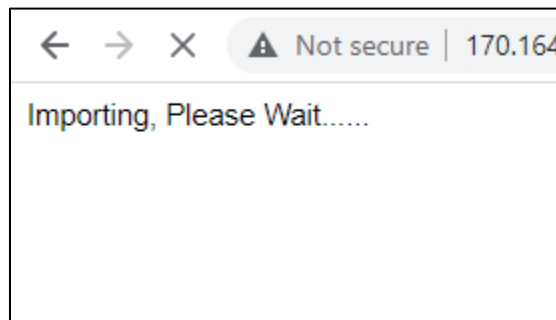
Signature Verification File Import

<input type="checkbox"/>	Filename	Creation
<input checked="" type="checkbox"/>	10036.txt	04/15/22
<input checked="" type="checkbox"/>	10142.txt	04/15/22
<input checked="" type="checkbox"/>	13250.txt	04/15/22
<input checked="" type="checkbox"/>	13251.txt	04/15/22
<input checked="" type="checkbox"/>	13252.txt	04/15/22

10 rows per page

Import

Note: The process may take some time, especially if 10 or more files are selected. Please be patient and wait for the new screen to appear.

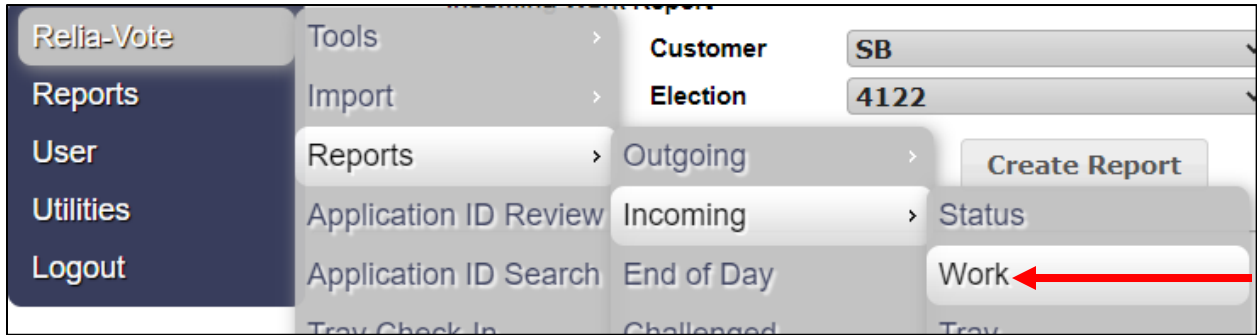


Once the import is finished, you will be met with a screen indicating that the imports were successful.

```
Import Complete

10036.txt:      Imported Successfully
10142.txt:      Imported Successfully
13250.txt:      Imported Successfully
13251.txt:      Imported Successfully
13252.txt:      Imported Successfully
&linktext=View Log File&linkurl=D:\Pitney Bowes\DATA\Log/PBSigVarLog.txt
```

7. Hover the mouse cursor over the *Relia-Vote* menu, hover over the *Reports* submenu, the Incoming submenu, and then click on the **Work** option.



8. Verify that the election ID is correct and then click the Create Report button.

Incoming Work Report

Customer

Election

9. On the new page, click the **Completed Signature Verification** link and verify that all the Wanda reports from the Sort Pass Report are listed. Please audit with other lead to verify that all the batch numbers were transferred to the report.

Incoming Work Report

Customer, Election SB, 4122

Work Summary (Trays)			
Ready for Export	1	Waiting for Manual Verification	109
		Completed Signature Verification	8

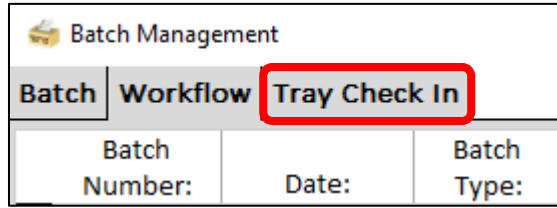
Incoming Work Report - Tray Listing (Completed Signature Verification)

Customer, Election SB, 4122

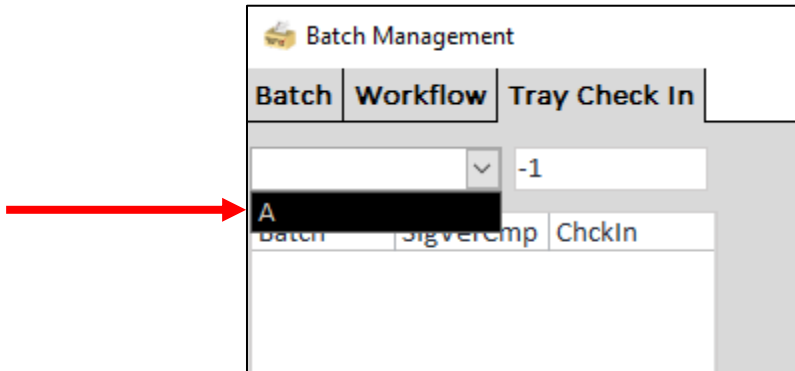
Tray	Count	Tray	Count	Tray	Count	Tray	Count
...

Note: If one or more reports are missing, do not hand out the Sort Pass Report. Pair with your supervisor for a solution.

10. In the MBPD Batch Management Window, click on the **Tray Check In** tab.



11. In the drop down, select the letter of the batches to be sorted.



12. Double-click each batch number.

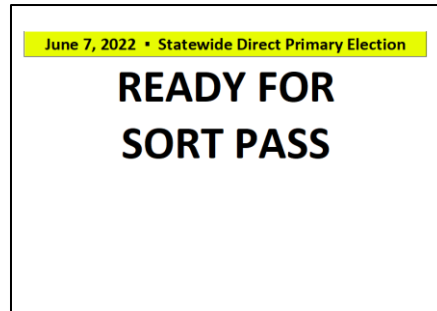
Note: The *Check-in* column should switch from *No* to *Yes*; the *SigVerCmp* column should already say *Yes* for all batches. If either of these do not happen, speak to your supervisor.

Note: You may see the screen on the right flash as it updates the trays. This is normal.

The screenshot shows a table with three columns: "Batch", "SigVerCmp", and "ChckIn". There are five rows of data. Red arrows point to the "Batch" column of each row.

Batch	SigVerCmp	ChckIn
10036	Yes	Yes
10142	Yes	Yes
13250	Yes	No
13251	Yes	No
13252	Yes	No

- Place the *Sort Pass Report* in the hanging file situated between the two Vantage ballot sorters labeled *Ready for Sort Pass*.



After the Second (2nd Sort) Pass is Complete

Once the envelope batches have been sorted into valid and challenged pockets and the Receiving and Sorting team have brought back the completed Sort Pass Report, the challenged ballots must be audited to determine if all of them have been separated from the valid envelopes. Once this audit is completed successfully, the Challenged Ballot Review Team may move the valid envelopes to the Extraction area and the challenged ballots to the challenge racks.

Creating the Batch Audit

The Batch Audit will need to be printed and distributed to the Challenged Ballot Review team.

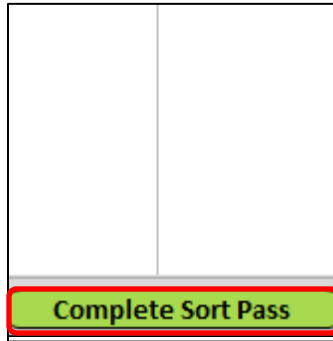
- In the MBPD Batch Management Window from the *in-Sort Pass Queue* drop down, select the letter that corresponds with the completed Sort Pass Report.

Note: The Sort Pass Done column should be fully checked off prior to performing the audit.

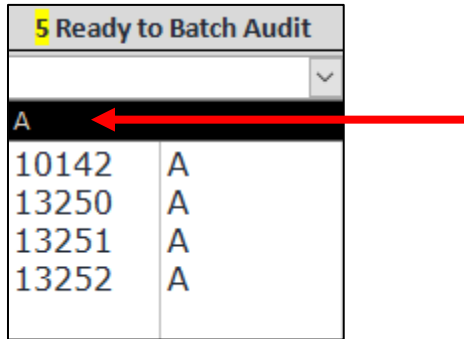
Check Done	Disposition Created	Sort Pass Done	Batch Audit Done
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

5 In Sort Pass Queue	
A	
10142	A
13250	A
13251	A
13252	A

- Click the Complete Sort Pass button.

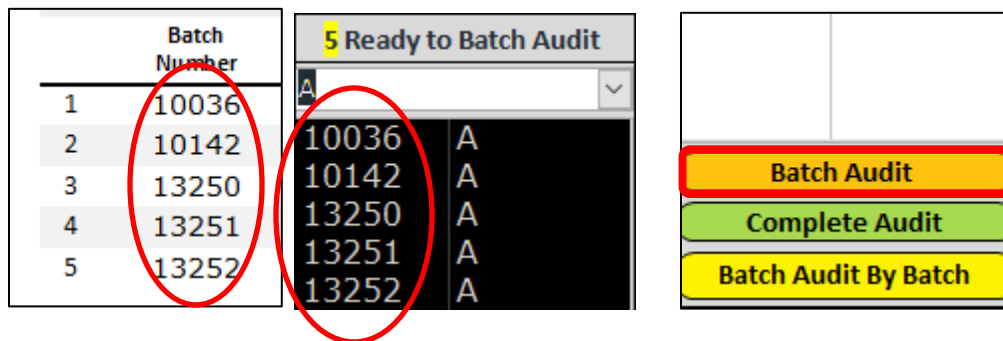


- In the drop down for Ready to Batch Audit, select the letter that corresponds with the completed Sort Pass Report.



- Click the Batch Audit button.

Note: All the batches of the letter should be highlighted; verify them against the Sort Pass Report.



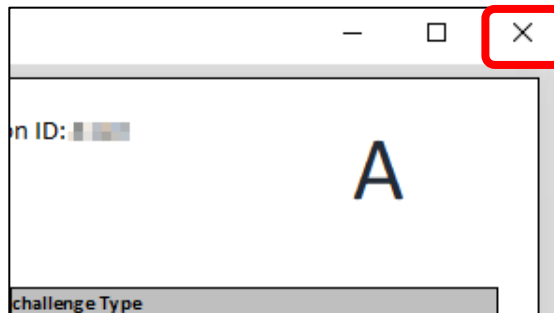
After a few moments, a *Batch Audit* report will appear.

Line	Batch	av_id	voter_id	envelope	challenge	challenge Type	
1	10142	[redacted]	[redacted]	154	[redacted]	[redacted]	7
2	10142	[redacted]	[redacted]	5	[redacted]	[redacted]	16
3	10142	[redacted]	[redacted]	25	[redacted]	[redacted]	18

7. Press Ctrl + P to print the *Batch Audit* report and collect it from the printer.
8. Pair with the other Data Workflow Lead to audit the tray tag slips binder clipped on the Sort Pass Report to the batch numbers listed on the Batch Audit report.
 - a. Data Workflow A: Take the first tray tag slip from the Sort Pass Report and read it out loud.
 - b. Data Workflow B: Highlight the corresponding batch number on the Batch Audit sheet.

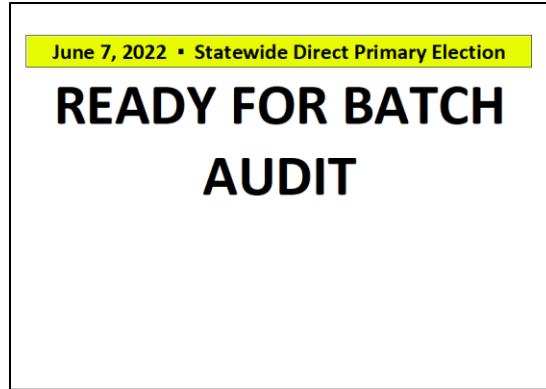
Note: If a batch number on a tray tag slip does not exist on the Batch Audit report, or if a number exists on the Batch Audit report but not on the tray tag slips, reach out to your supervisor to come up with a plan to audit the ballots.

9. Close the *Batch Audit* window.



10. Place the report into the hanging file marked *Ready for Batch Audit*.

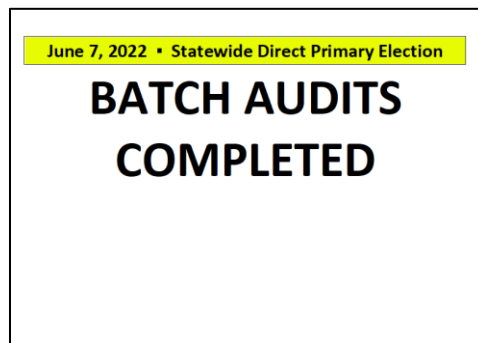
Note: Staple multiple pages together as needed



Processing the Completed Batch Audit

Once the batch audit has been completed, the database must be updated, and the paperwork filed away.

1. Retrieve the completed batch audit report from the hanging wall file labeled *Batch Audits Completed*.



2. Verify that there are at least 2 initials and a date on the batch audit sheets.

Batch Audit - [REDACTED] ID: [REDACTED]

Batches 10036 10142 13250 13251 13252

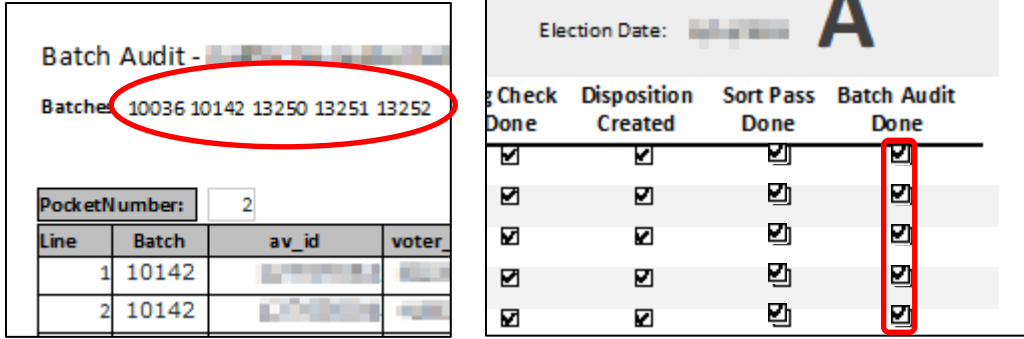
CT 5/22/2022

AG

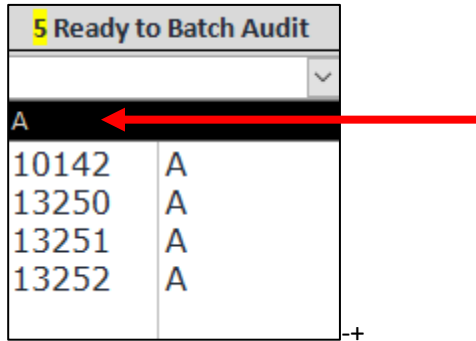
PocketNumber:

Line	Batch	av_id	voter_id	envelope	challenge	challenge Type	
1	10142	[REDACTED]	[REDACTED]	154	[REDACTED]	[REDACTED]	7
2	10142	[REDACTED]	[REDACTED]	5	[REDACTED]	[REDACTED]	16

3. For each batch number on the batch audit sheets, check off the corresponding *Batch Audit Done* checkbox on the *Sort Pass Report*.

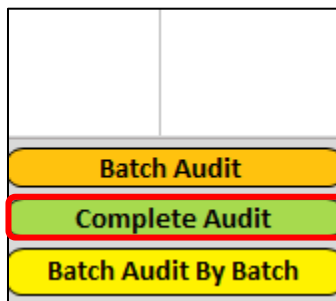


- In the database, in the drop down for *Ready to Batch Audit*, select the letter that corresponds with the completed *Sort Pass Report*.

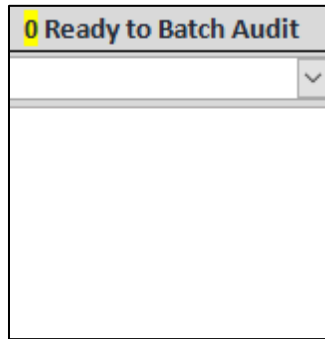


- Click the **Complete Audit** button.

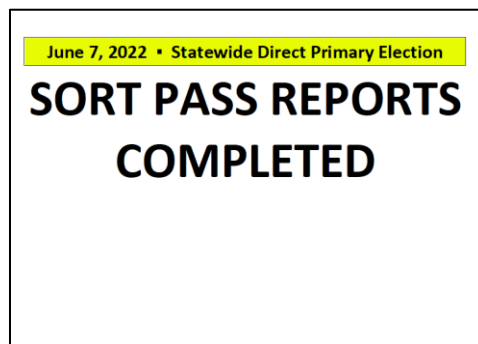
Note: All the batches of the letter should be highlighted; verify them against the batch audit sheets.



- All the batch numbers for that letter should now be cleared from the list box.

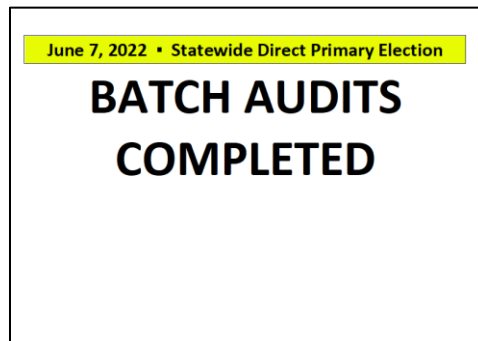


- Place the *Sort Pass Report* into the gray bin labeled **Sort Pass Reports Completed**.



- Place the batch audit sheets into the gray bin labeled **Batch Audits Completed**.

Note: There is a gray bin labeled **Batch Audits Completed** and a hanging wall file labeled **Batch Audits Completed**. Place these in the gray bin and not the hanging wall file.



Authorization

Document Owner: Ballot Department	Initiation Date: 03/25/2022
Version Number: 3.1, Original Document	Date: 08/23/2023
Version Written By: Caleb Talmas, Anel Martinez	