REGISTRAR OF VOTERS

Data Workflow Processing: Creating Disposition File for Sort Pass

PROCEDURE DOCUMENT – Version 3.1

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Contents

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 (L:\) drive access
- C:\Temp folder
- BlueCrest Relia-Vote Batch Processing Tool access
- DIMS.net Access w/ Miscellaneous Menu > Wanda access
- PB Out 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 Lead A: Read the data aloud.

2. Data Workflow Lead B: <mark>Highlight</mark> the corresponding data on the paperwork.

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

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.
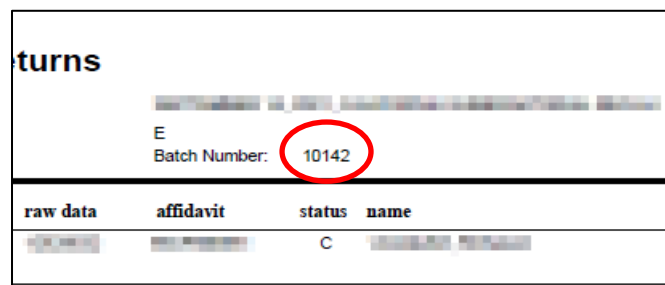
Processing a Batch's Disposition File

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. **Verify** that the Wanda reports have been worked on before you create the Sort Pass. This information must be on the Wanda Report in order to proceed.
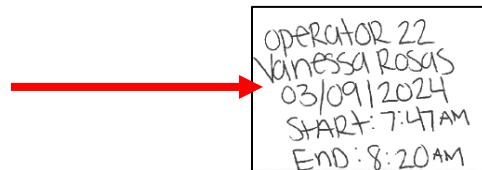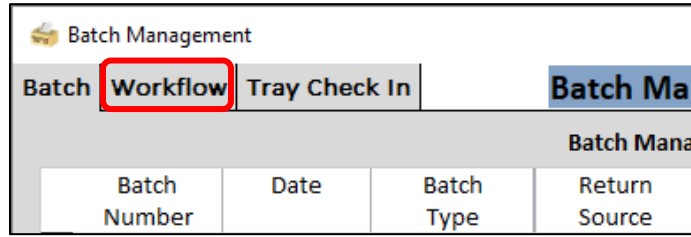

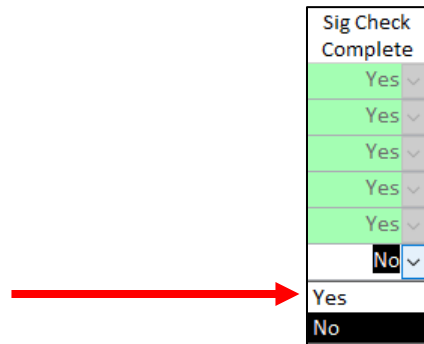2. Locate the Batch Numbers at the top of each of the Wanda Report pages.

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

4. Scroll and locate the batch file in the list. If the file is quarantined (in QC), please ask a Lead or Supervisor from Signature verification to release the file if it has been completed.


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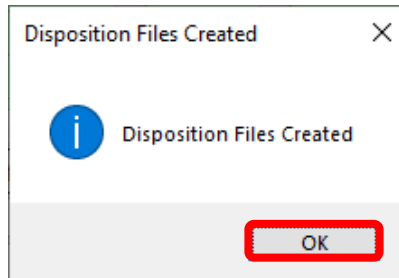

Note: In the list boxes down below, the batch number should have moved from the *Ready to Sig Ver* list box to the *Ready for Disposition* list box.
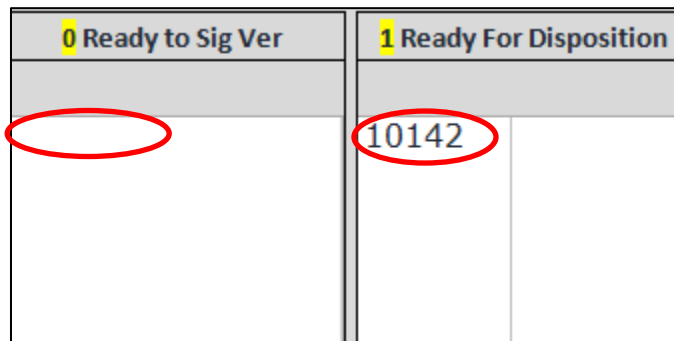
6. Repeat this process for all Wanda reports.

7. 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**.
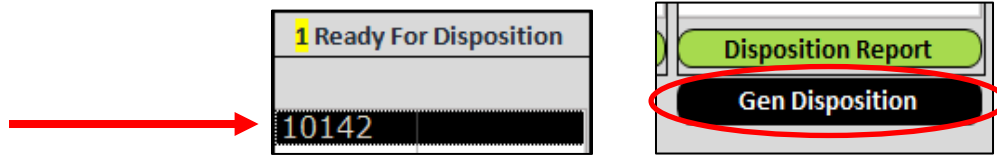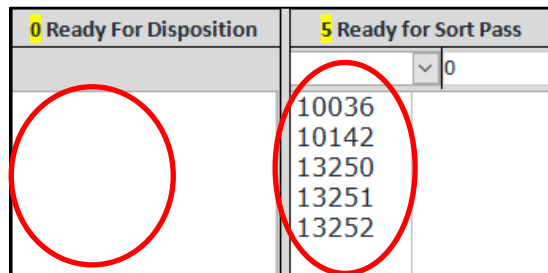

8. In the *Disposition Files Created* popup, click OK.

9. 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 batches are not moving over, close and re-open the database.

10. 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 with the other completed Wanda reports.
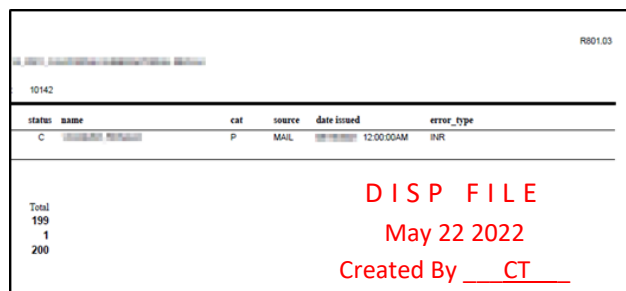
Grouping Batches and Building a Sort Pass

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.
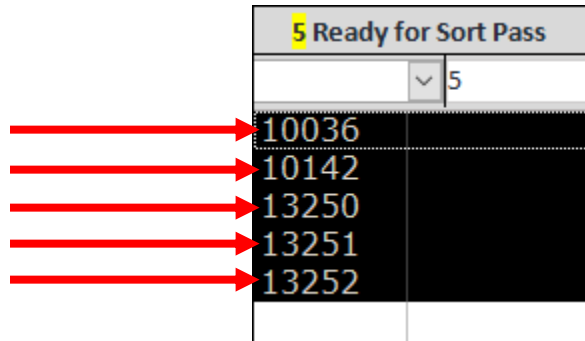
Note: Ensure that the total number of envelopes across all batches <u>do not</u> go over 4,100 pieces. The machine has a maximum capacity for its pockets and this number will allow for many envelopes without hitting that capacity.

2. In the drop down under *Ready for Sort Pass*, select the next available letter that has not been used today. If you run out of the whole alphabet, you can use Double letters if necessary, but ask Supervisor first.
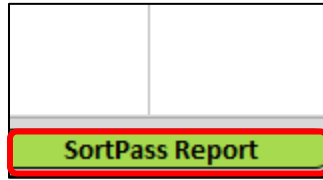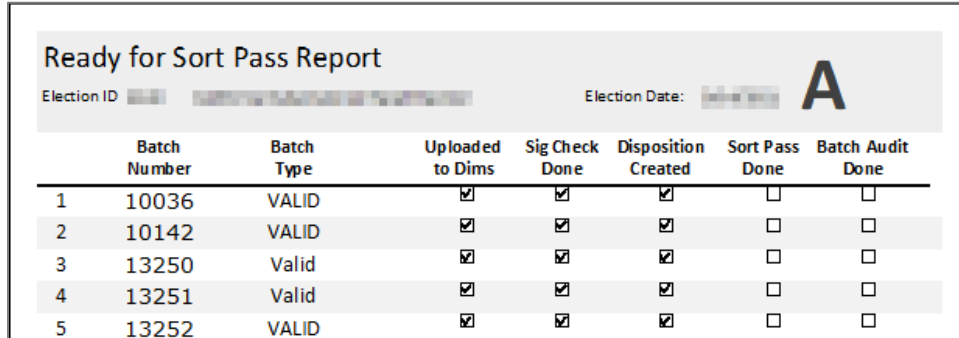
3. Click the **Sort Pass Report** button.

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

Note: MBPD may glitch while generating the Sort Pass Report. If this happens, please log out of the system, log back on and verify you have all the batch numbers on your report.

5. 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.

6. 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***
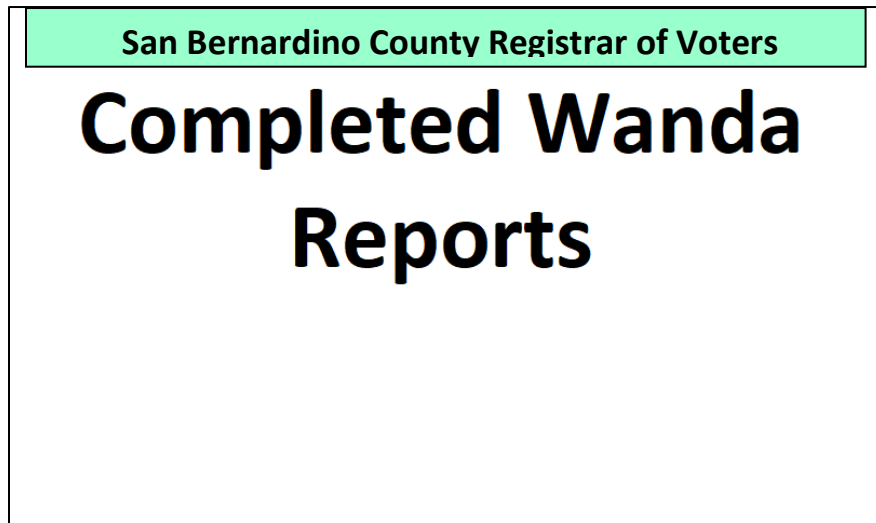
7. Close the Sort Pass Report window.
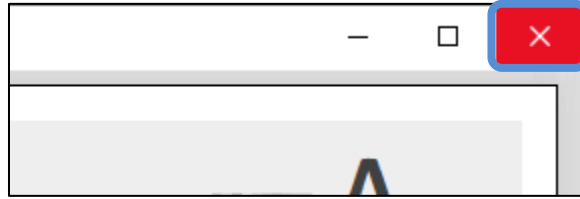
Using Relia-Vote to Prepare the Batches for Sort Pass (2ⁿᵈ Sort)

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

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


2. In the *Please Login* popup, enter the following information, then click Login.
   a. Username → **Operator**
   b. Password – Will be provided by a Lead or a Supervisor.
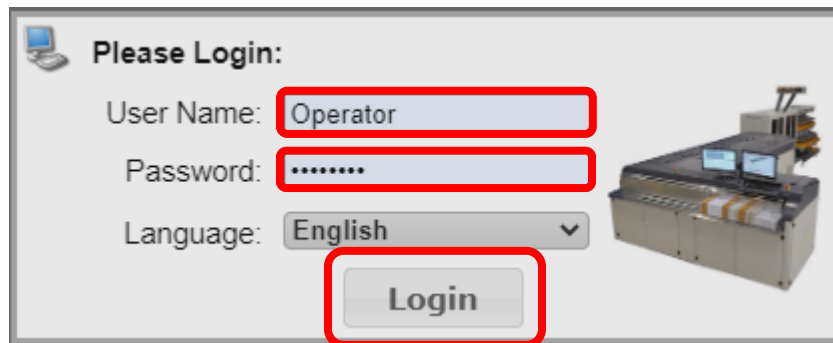
3. In the new screen, hover the mouse cursor over the *Relia-Vote* menu, hover over the *Import* submenu, and then click on the **Signature Verification** option.

4. In the *Signature Verification File Import* table, check the box for each batch number listed under the Sort Pass Report. ***Verify with the other Data Workflow Lead.***
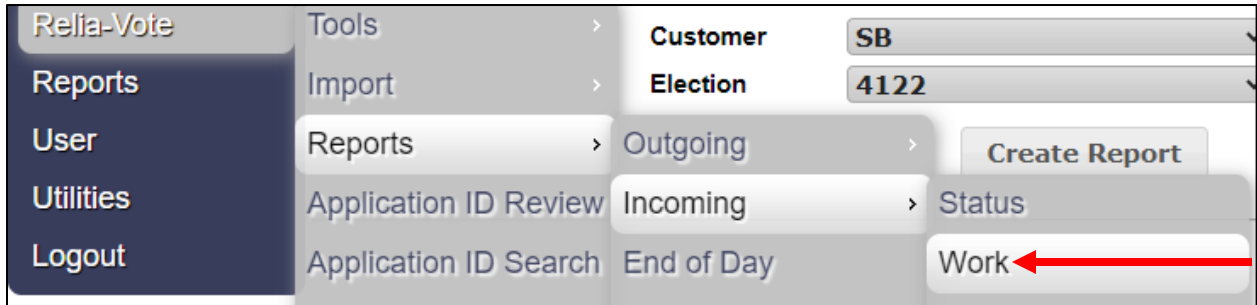
5. Click the Import button.
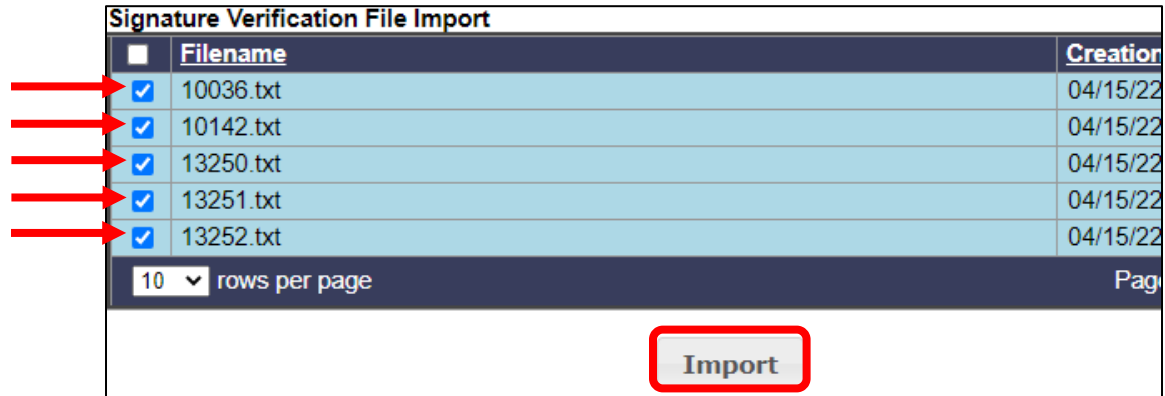
Note: The process may take some time, especially if 10 or more files are selected. Please be patient and wait for the new screen to appear.
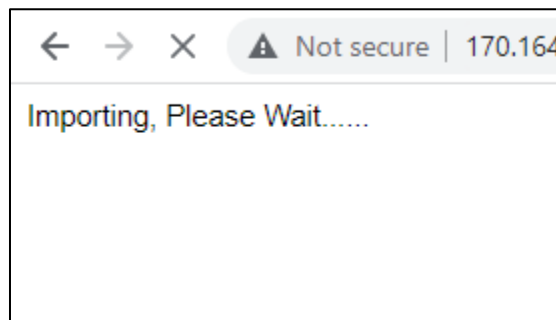
Once the import is finished, you will see a screen indicating that the imports were successful.
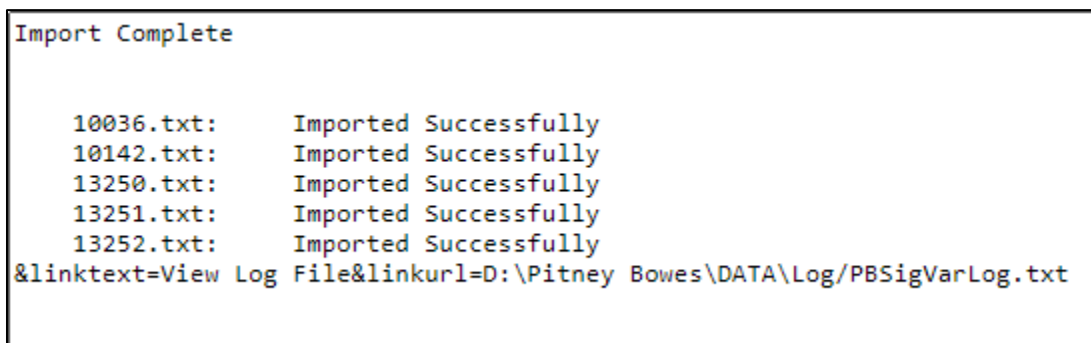
6. Hover the mouse cursor over the *Relia-Vote* menu, hover over the *Reports* submenu, the *Incoming* submenu, and then select the **Work** option.

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

8. 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.

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

9. In the MBPD Batch Management Window, click on the **Tray Check In** tab.
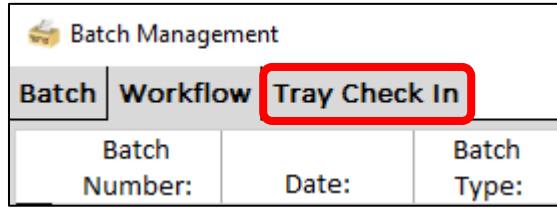
10. In the drop down, select the letter of the batches to be sorted.
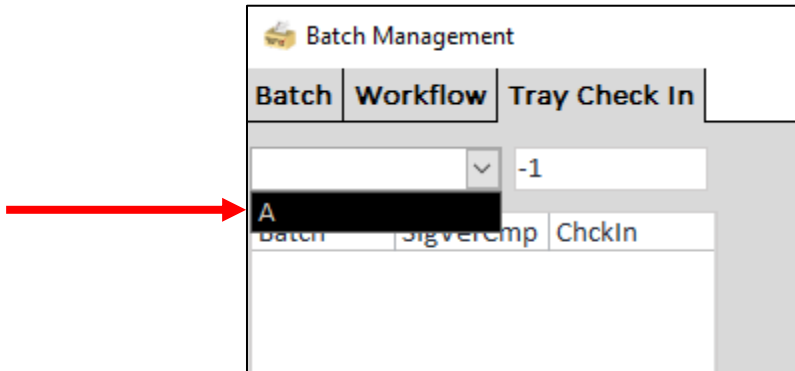
11. Double-click each batch number.

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.

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

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

<div align="center">

San Bernardino County Registrar of Voters

READY FOR
SORT PASS

</div>

Authorization

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