

# **Best Practices Workshop**

***Call Center and  
Phone Bank Training  
December 12, 2013***



# Value of a Call Center

**By funneling routine phone calls through a Call Center, the staff is able to focus on specific, time-sensitive assignments.**



**A Call Center can create a relaxed, united front whose sole purpose is customer service.**

# **RECRUITING**

## **What Kind of Skills are Valuable?**

- **People Skills**
- **Service Nature/Helpful Spirit**
- **Plays/Works Well With Others**
- **Flexible Personality**
- **Computer Literate/Comfort Level With That Environment**

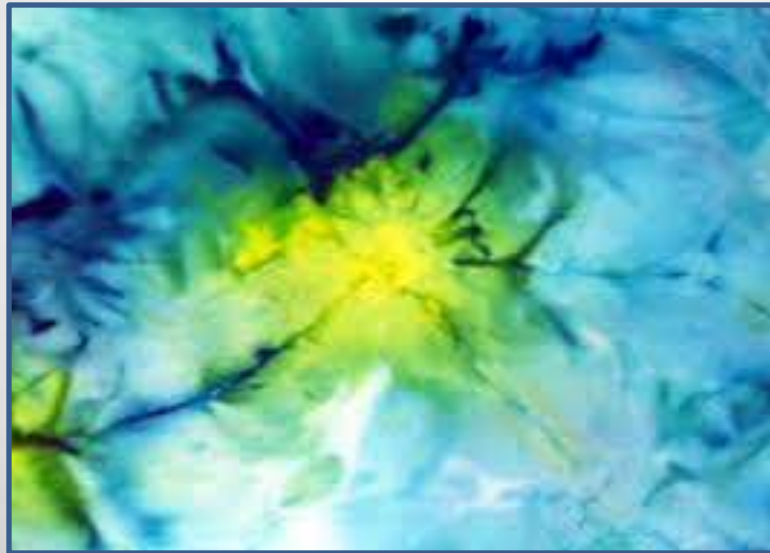
# **RECRUITING**

## **Where Do You Find These People?**

- **Networking**
- **Friends of friends**
- **People who have helped your office before**
- **Community Colleges**
- **?**

# RECRUITING

## Importance of a Lead



**A strong leader can create a buffer and channel that makes the entire team more efficient.**

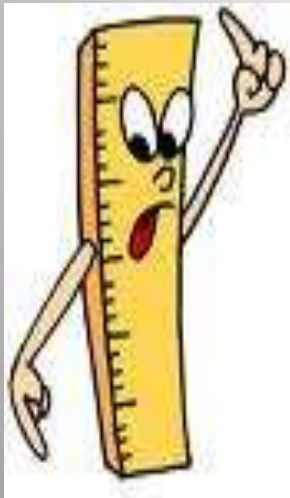
# Importance of a Lead



**Speed of the leader, speed of the team!**

# RECRUITING

Creating a Team- Develop a Slogan

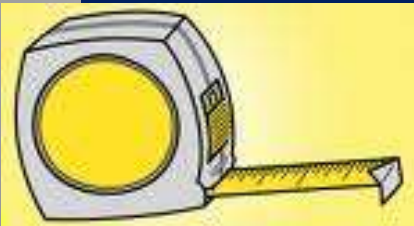


The  
GOLDEN  
RULE

Be the kind, respectful person  
you wish were helping you!

## Creating a Team- Develop a Slogan

**The perception of  
our office will be  
measured by the  
first impression  
you make.**



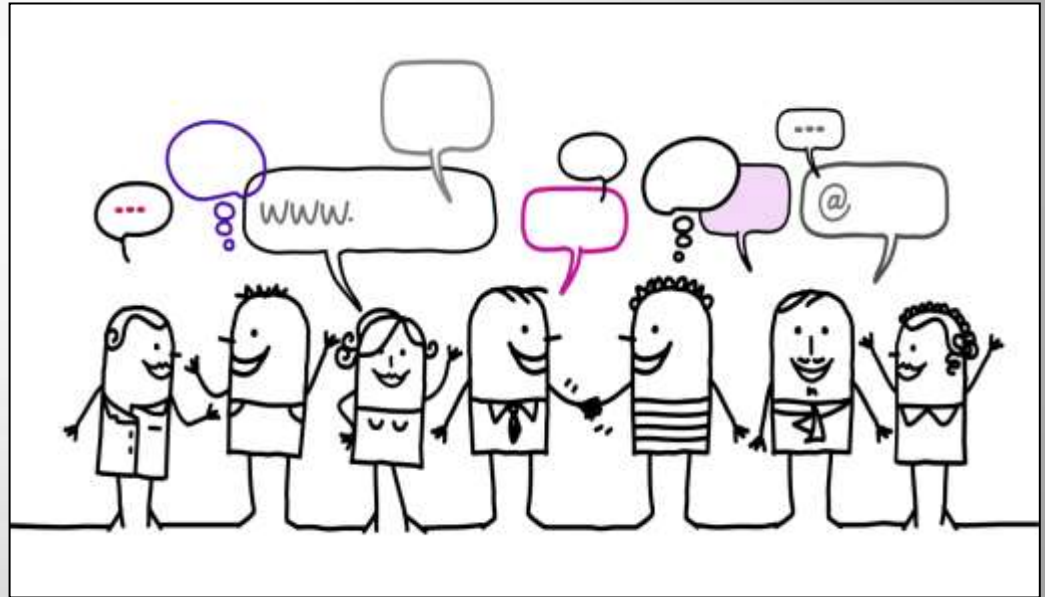


# Create a Team

## Create a Team With Team Exercises

### Instruction to group/teams:

You have five minutes to discover an interesting, surprising and separate connection you share with each person in your team.



# Create a Team

## Create a Team With Team Exercises




if you...

- have never eaten dessert before your meal
- have never wished you could do something better
- have never fallen asleep in class, at a meeting or in church
- have never bought a pair of shoes that didn't really fit
- don't like chocolate
- if cherry pie is your favorite dessert
- if Ann is your middle name
- if your cell phone is dead right now
- if red is your favorite color
- if you've ever worked as a waitress
- if you've ridden in a hot air balloon
- if you've ever traveled to Europe
- if you use Tide detergent to wash your clothes

# RECRUITING

## Instilling Loyalty



Respect is earned.  
Honesty is appreciated.  
Trust is gained.  
Loyalty is returned.

# RECRUITING

## Instilling Loyalty



Make sure they understand what they are doing, provide them with the right tools.

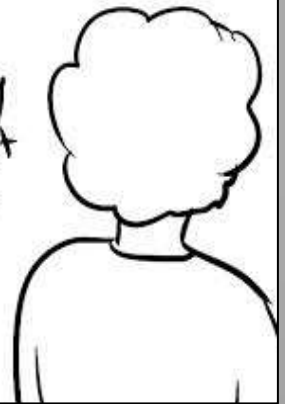


Listen to their ideas, and when feasible, incorporate them.



Tell them how valuable and important they are to the organization.

don't  
worry  
about  
it



Entrust them to do their job and let them know you are entrusting them.

# DEFINE PARAMETERS

**What are your expectations?**

**Why do you need a Call Center?**

**What could they do that would be most useful/helpful for your staff?**

**What is the timeframe in which these extra hands would be most helpful?**

**What can you realistically train them to do that will make them truly useful?**

# DEFINE PARAMETERS

Do My Parameters Justify the Cost?



# DEFINE PARAMETERS

Once your need is identified  
Decide exactly what  
their tasks will be.



# **What Pasco Expects Their Call Center To Do**

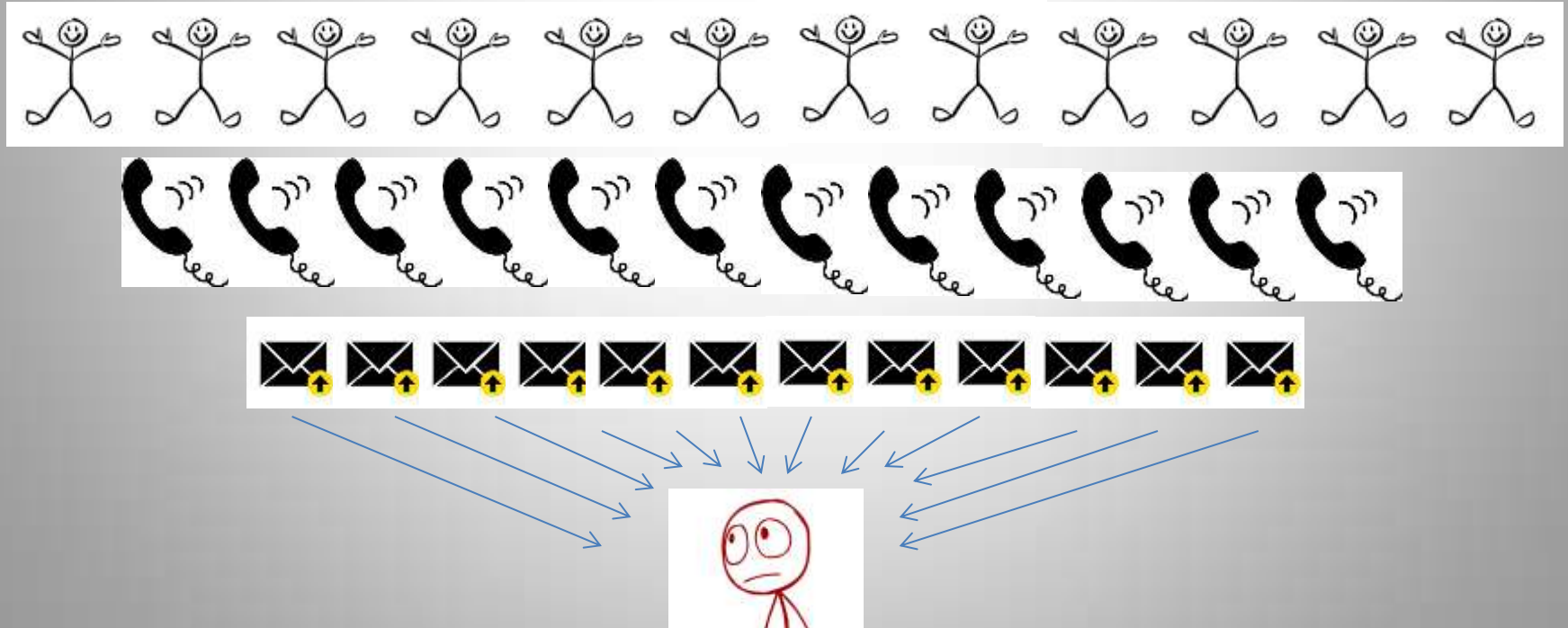
***Simply stated the Call Center's responsibility is to:***

- 1. Field calls from voters regarding their voter registration and eligibility.**
- 2. Answer questions they have about voting and where.**
- 3. Give information regarding their representation in government.**
- 4. Take absentee ballot requests by phone.**
- 5. Take address changes by phone.**



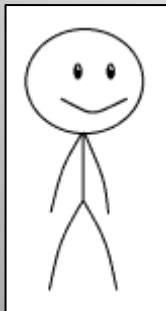
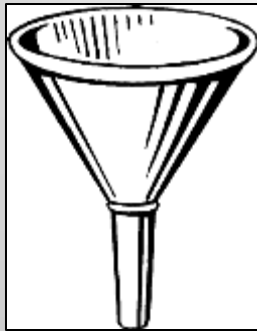
# DEFINE PARAMETERS

How Will You Communicate  
With Them?



# DEFINE PARAMETERS

How Will You Communicate  
With Them?



# DEFINE PARAMETERS

## Importance of Personnel Policy



# **Personnel Rules**

## **For Temporary Call Center Staff**

- You are expected to report to work and be at your work station ready to take phone calls by 8:30 a.m. An occasional late arrival is understandable, but consistent tardiness is unacceptable.
- If you are ill and unable to work, please call the Supervisor of Elections' Office, 521-4302 by 8:45 a.m.
- Casual dress is expected and acceptable while working at the Call Center. Jeans, t-shirts that are not political in nature and do not contain obscenities or foul language are acceptable.

# **Personnel Rules**

## **For Temporary Call Center Staff**

- NEVER use your e-mail address or the internet for personal reasons.
- Never answer questions that you are not absolutely sure of the answer. Always consult one of your peers at the call center, or transfer the call to the appropriate permanent staff.
- Fill-in timesheet on a daily basis. You are responsible for having it signed off by a supervisor and turning it in at the end of the pay period, but only if you want to get paid.

# **Personnel Rules**

## **For Temporary Call Center Staff**

- Using headsets or playing music while answering the phones is prohibited. Keep the noise level to a minimum while other call center operators are on the phones with voters. Unprofessional behavior and background noise is unacceptable and should be avoided; particularly when receiving phone calls from the public.
- Although personal conversations and camaraderie are acceptable during slow times at the call center, please be courteous of other staff working in the warehouse and distracting them from their work

# Personnel Rules For Temporary Call Center Staff

- You are welcome to use the refrigerator in the kitchen area, but you are responsible for doing your dishes and cleaning up after yourself. Do not leave food in the refrigerator that could spoil.

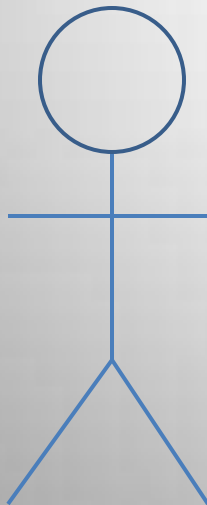




# DEFINE PARAMETERS

## Importance of Personnel Policy The Case of the Size 3 Shorts

Employee 1



Employee 2



Size 3 Shorts





# DEFINE PARAMETERS

...and then there was the guy  
who was shocked that he had  
to work all day election day  
because he had class sheesh....



# DEFINE PARAMETERS

Mom – maybe you should make them sign a contract!



# Best Practices Workshop

## Break Time



# **Pasco County's Training Topics/Tools**

- 1. Understanding Voting – Elections 101**
- 2. Civics 101**
- 3. Understanding Voter Registration**
- 4. Using Voter Focus**
- 5. Learning about Vote-By-Mail ballots**
- 6. The Website as a Resource**
- 7. Effective Telephone  
Techniques/Directing Calls**

# Create Your Training

## Death By PowerPoint

- Too many speakers try to cram everything they have to say into their PowerPoint slides. Instead of using visual aids to punctuate and reinforce what they're saying, they create too many of them and pack too much information onto each. In the end, they only end up confusing the audience.
- Most people do this because they treat presentations as an opportunity to simply dispense information. Overwhelming the audience with information actually gets in the way of communicating the message.
- Too much information can make the audience feel like they're not smart. They'll transfer that anger and frustration to the speaker.

<http://www.smallbusinesscomputing.com/biztools/article.php/684871/Death-By-Powerpoint.htm>



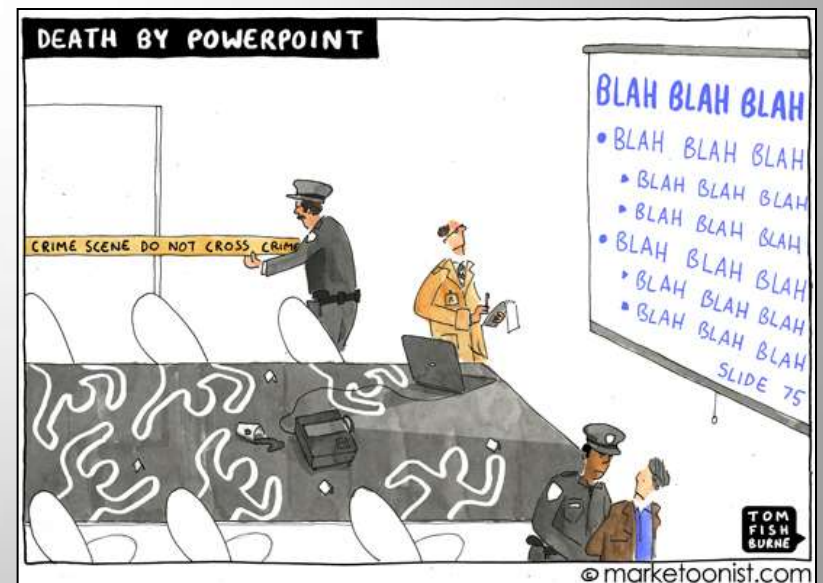
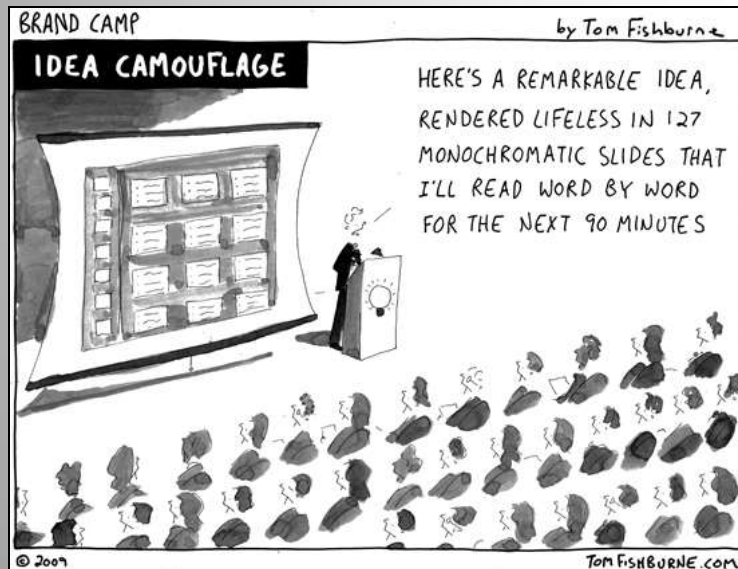
# Create Your Training

## Seven Learning Styles

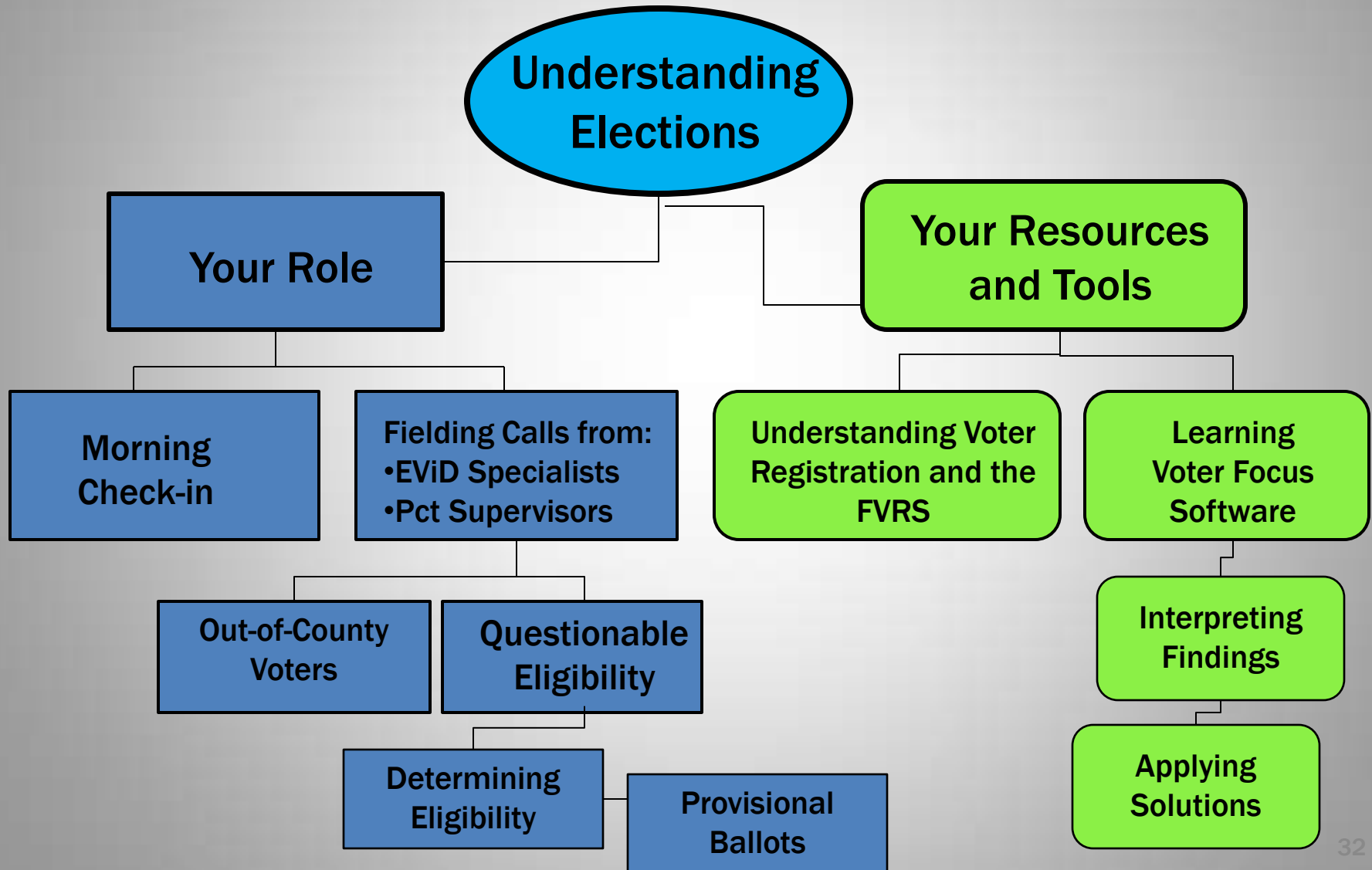
- **Visual** (spatial): You prefer using pictures, images, and spatial understanding.
- **Verbal** (linguistic): You prefer using words, both in speech and writing.
- **Physical** (kinesthetic): You prefer using your body, hands and sense of touch.
- **Logical** (mathematical): You prefer using logic, reasoning and systems.
- **Social** (interpersonal): You prefer to learn in groups or with other people.
- **Solitary** (intrapersonal): You prefer to work alone and use self-study.
- **Aural** (auditory-musical): You prefer using sound and music.

# Visual Learning Style

- **Visual (spatial):** You prefer using pictures, images, and spatial understanding.



# Training Flow Chart





# ***Blink! Blink!*** ***your phone will not ring)***



- *Good Morning! Supervisor of Elections.*
- I just moved, and I'm not sure if I am registered to vote.

- *Ok. What is your name?*
- My name is Samantha Johnson.



I think I registered when I lived in Dade City.



# Let's see ...click on Voter Focus click on Voters enter name ....



**Find a Voter**

Search By Name      Local Search by Address      FVRS General Search

Enter All Details in the first box to give the fastest search      Use "%" for wildcard

Last-Name (Voter ID): Johnson	First-Name: Samantha	Middle Name: 	Date-of-Birth: / /
D License 			

Record Selection  
☒ All Records  
☐ Pollworkers Only  
☐ Permanent

Local Search      Cancel  
FVRS Search      Application Error

- Ok ....J-o-h-n-s-o-n ...S-a-m-a-n-t-h-a
- Click on Local Search (cause she said she moved from Dade City) ...



# Select Voter Screen ...

**Training Select Voter**

Active InActive Pre-Reg Ineligible Incomp Pending Deleted Denied Sort Voter Name

Search For Johnson, Samantha B'day D Lic SSN4

Cnty	Name	Address	Sex/Rce/Pty	Birth Date	Prct	City	Voter ID
PAS	P.S Johnson, Samantha A	19780 Lake Patience Rd	F 5 Dem	11/13/1980	036.1	Pasco County	106500788
PAS	A.1 Johnson, Samantha B	13718 5th ST	F 5 Dem	08/03/1987	001.1	Dade City	103793222

- Uh Oh! Red ...ineligible
- What now? Maybe it's not her.

•Samantha, What is your date of birth?

•August 3<sup>rd</sup> 1987.

Oh good ...that's not her.



103793222 Johnson, Samantha B

Maint Doc Images Activity Elections Audit Absentee Comms CVDB

PAS 103793222 Johnson, Samantha B 13718 5th ST, Dade City, 33525 103793222

Last	Style	First	Middle	Driver License	Source	Soc Sec Num	Source				
Johnson		Samantha	Blair	J525-782-87-783-0	F,Form	- 5585	F,Form				
Nbr	Suf	Dir	Street Name	Type	Dir Suf	Unit Type/Nbr	City Name	County	Zip Code		
13718			5th	ST			Dade City	PASCO	33525		
Line 1			Line 2			Line 3			City	State Zip Code	Country
Mail											
Sex	Race	Party	Party Change Req Date	Regn Date	Reason(Status)						
F	5,White, not	Dem,Florida De	/ /	03/17/2005	1(A) Active Voter						
Date of Birth	Birth Place	Telephone	Prior Name/Add								
08/03/1987	FLORIDA		Prior Address								
Assistance?			PW Interest?			Ext			Edit Address		
Addr Protect?			Fed Elections Only						Printing...		
ID Required to Vote			Photo Id Seen						Voter Response		
Photo ID Type									Card Image could not be located		

Districts							
Precinct	Cng	Sen	Hse	CC	SB	Wrd	Dade City
001.1	5	12	61	1	1	1	

I think I found it! Do you remember your address in Dade City, and can you confirm the last four digits of your social security #?



Yes, my social security # is 5585 and I used to live on 5<sup>th</sup> St.

But now I live at 3628 Hunting Creek Loop in Trinity

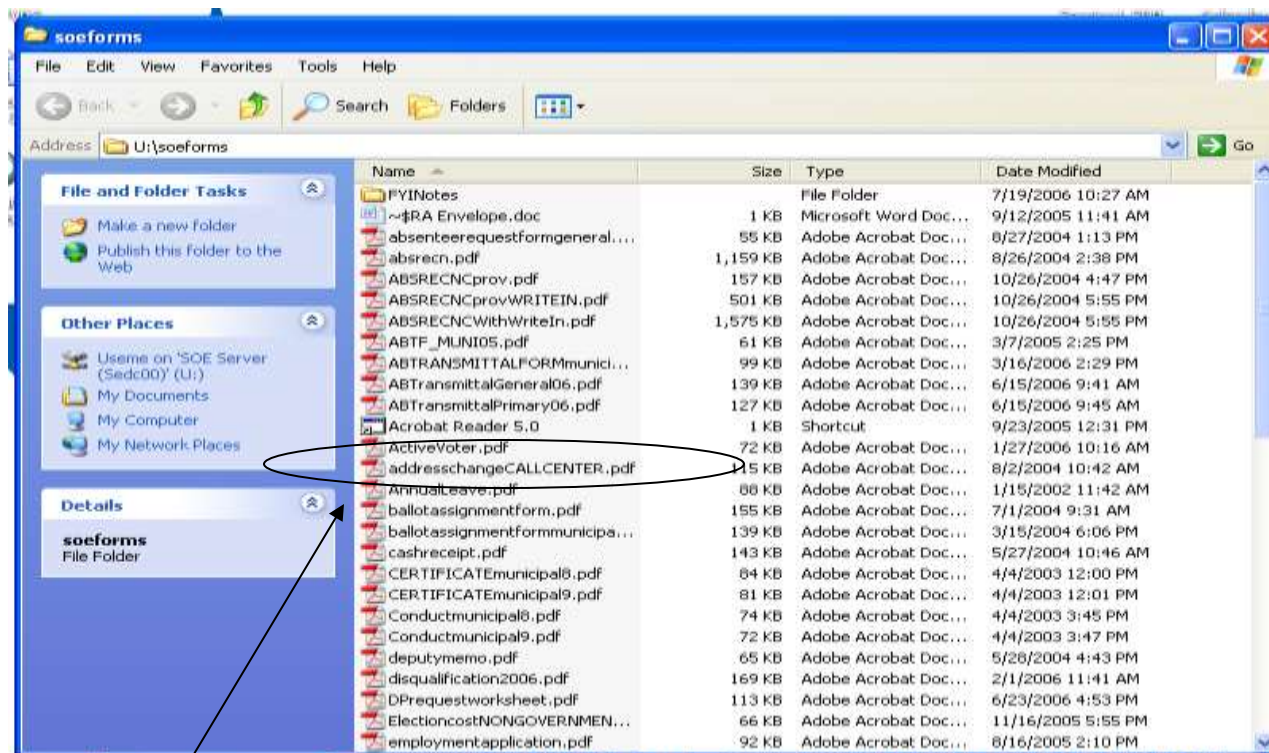
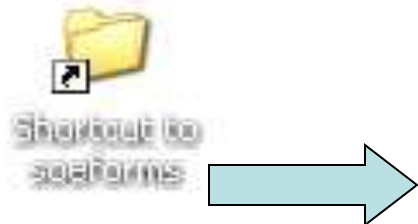


Ok. No problem. We just need to make an address change.

Please hold while I get to the form I need to take your information.

Ok...click on SOE forms on the desktop.





Here it is ...  
All I have to do now  
is enter your new  
address  
information. We'll  
process the change  
and mail you a new  
voter information  
card.



**Brian E. Corley**

Supervisor of Elections  
Pasco County  
Post Office Box 300  
Dade City, FL 33526-0300

**TELEPHONE ADDRESS CHANGE FORM**  
Pasco County, Florida

SITE # 810 DATE: \_\_\_\_\_

Name: \_\_\_\_\_

Voter ID#: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

NEW Residence Address: \_\_\_\_\_

NEW Mailing Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Immediate Family Information:

NAME: \_\_\_\_\_ RELATIONSHIP: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

Deputy Supervisor of Elections

☐ ABSENTEE REQUEST FOR ALL ELECTIONS

☐ FOR PRIMARY ELECTION ONLY

☐ FOR GENERAL ELECTION ONLY

☐ PERMANENT STATUS

Mailing Address for Absentee Request (if different from above)

Telephone Number: \_\_\_\_\_

East Pasco Government Center David "Ray" Clark Professional Center Village Market of Union Chapel West Pasco Government Center  
Dade City (202) 521-4000 Lead O' Lakes (813) 629-1286 Udoncy Chapel (813) 629-1392 New Port Richey (727) 847-6162

Will this take  
very long ...I  
have an  
appointment  
for a  
manicure?






I'm almost finished...

I want to remind you that you **MUST** take your photo and signature ID to the polls with you...

Oh, and Samantha, by the way, Happy Birthday!



 **Brian E. Corley**  
Supervisor of Elections  
Pasco County  
Post Office Box 300  
Dade City, FL 33526-0300

**TELEPHONE ADDRESS CHANGE FORM**  
Pasco County, Florida

SITE # 810 DATE: August 4, 2008

Name: Samantha Johnson

Voter ID#: 103793222 Date of Birth: 08/03/87

NEW Residence Address: 3628 Hunting Creek Loop Trinity

NEW Mailing Address: same as above

Telephone Number: \_\_\_\_\_

Immediate Family Information:

NAME: \_\_\_\_\_ RELATIONSHIP: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

TS Bentley  
Deputy Supervisor of Elections

☐ ABSENTEE REQUEST FOR ALL ELECTIONS

☐ FOR PRIMARY ELECTION ONLY

☐ FOR GENERAL ELECTION ONLY

☐ PERMANENT STATUS

Mailing Address for Absentee Request (if different from above)  
\_\_\_\_\_  
\_\_\_\_\_

Telephone Number: \_\_\_\_\_

East Pasco Government Center South City (352) 527-4302 David "Ray" Clark Professional Center Land O' Lakes (813) 629-1286 Village Market of Lakeside Chapel Udonia Chapel (813) 926-1392 West Pasco Government Center New Port Richey (727) 547-5162





# Verbal Learning Style

- **Verbal (linguistic):** You prefer using words, both in speech and writing. You love reading and writing. You like playing on the meaning or sound of words, such as in tongue twisters, rhymes, and limericks.

★ Group Discussions

★ Oral / Written Examinations

# **Verbal Learning Style**

## **CALL CENTER TRAINING MANUAL FREQUENTLY ASKED QUESTIONS**

- 1. How do I register to vote?**
- 2. Is it too late to register to vote?**
- 3. I moved to another county what do I do?**
- 4. I did not get my ID card. Can I still vote?**
- 5. Why can't I vote at the polling place a block from my house? Why must I drive miles out of my way when there is a polling place so close?**
- 6. How can I change my name or address? I've moved and I need to report my new address.**
- 7. Where can I go to vote early before Election Day?**

# Verbal Learning Style

## Call Center Training Recall Quiz – July 6, 2012

Multiple Choice – circle the BEST answer

1. A voter lives in Pasco but works in Pinellas County. Can they early vote during their lunch hour at the library down the street from their workplace?

**Yes**, as long as they show photo/signature ID

**No**, assuming the library is located in Pinellas County

2. A voter lives in Pasco and claims residency here. Their driver license is from Michigan, but it is still valid. Can they use this as identification at the polls?

**Yes**, as long as it is still valid

**No**, it has to be a FL driver license

# Verbal Learning Style

## Completion Questions

1. How many registered voters are in School Board District 4? \_\_\_\_\_
2. What Senate District is Pct 106 in? \_\_\_\_\_
3. How many people voted in the 2010 primary? \_\_\_\_\_
4. How many votes did School Board Member Steve Luikart get in 2010? \_\_\_\_\_
5. Is precinct 63 in a municipality? \_\_\_\_\_
6. How much money did Mike Wells collect in campaign contributions? \_\_\_\_\_
7. How many registered Republicans are there in Pasco County? \_\_\_\_\_

# Verbal Learning Style

## Voter Lookup

For each person listed determine:

- a). If they have a valid registration in Florida and if they are eligible to vote
- b). What you will tell them in your phone conversation

- **Bernard Bennett 10/11/18**

- a). Eligible Y or N

- b). Explanation \_\_\_\_\_

- **Edna Johnston 2/2/17**

- a). Eligible Y or N

- b). Explanation \_\_\_\_\_

# Good in Florida - Good to go...



# Examples of Appealing to Learning Styles

**Physical (kinesthetic):** You prefer using your body, hands and sense of touch.

- ★ Hands-on
- ★ Practical Application
- ★ Learns by “doing”



# Understanding and Using Voter Focus





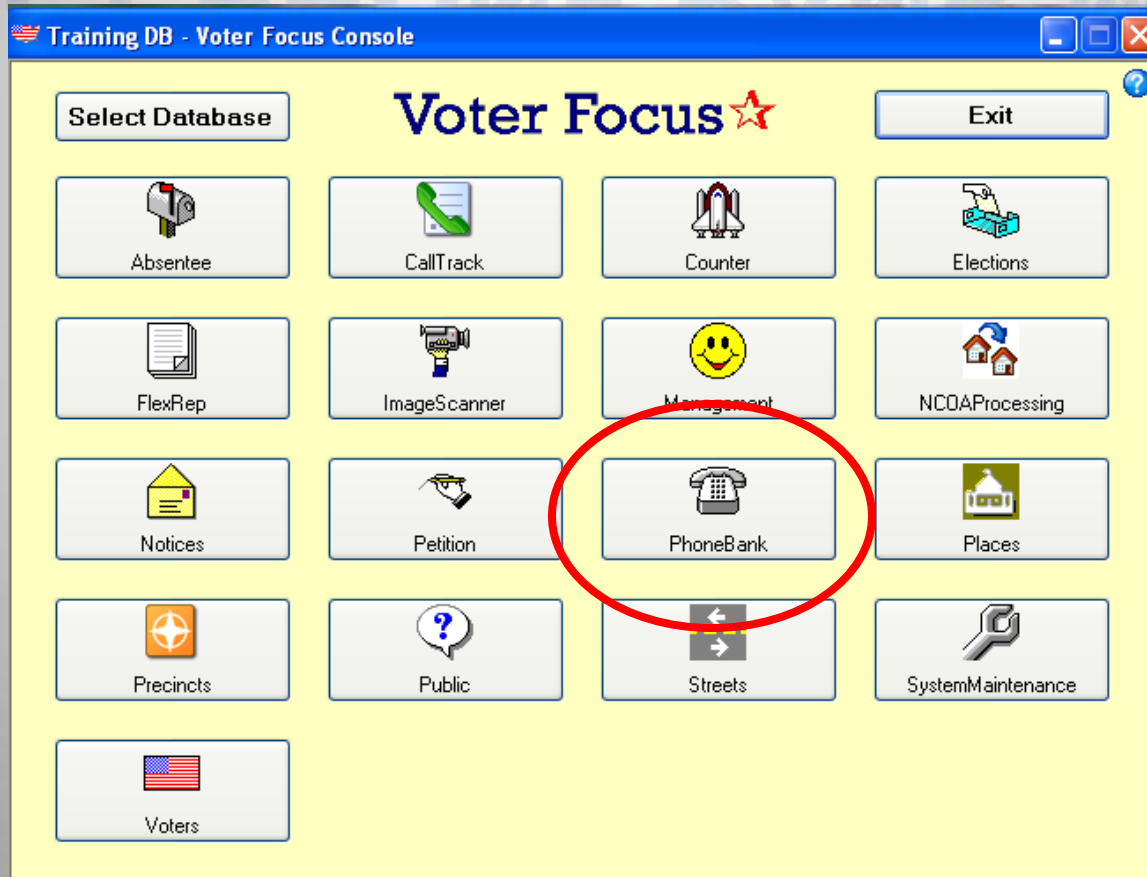
# **Voter Focus**

## **An Election and Voter Information Management System**


- The software which Pasco County uses to maintain the database.
- Interfaces with the Florida Voter Registration System.
- Is supplied by VR Systems, Inc.

# Making sure you are in the Training Database . . .

## SELECT PHONE BANK MODULE



# Your Screen Looks Like This

 **Training Phone Bank Display**

Voter Name  Gender

Residence Address  City  Zip Code

Mailing Address

Date of Birth

Race

Status/Reason

Party  Regn Date  ☐ See Comms

☐ Need Assistance? Military Status

Voter's Location in the precinct register

Districts  
Precinct  Cng  Sen  Hse  CC  SB  Wrd


Polling Place

Place Name

Polling Place Directions

Election 2012 General Election

# Select Find a Voter

 **Training Phone Bank Display**

Voter Name  Gender

Residence Address  City  Zip Code

Mailing Address

Date of Birth

Race

Status/Reason

Party  Regn Date  ☐ See Comms

☐ Need Assistance? Military Status

Voter's Location in the precinct register

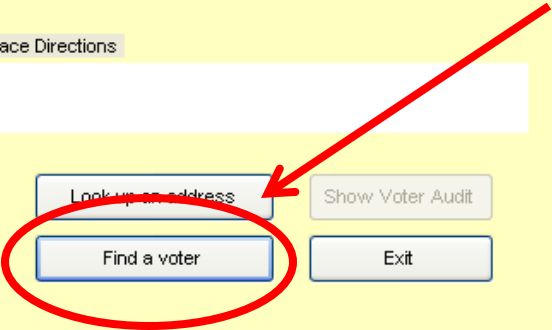
Districts  
Precinct  Cng  Sen  Hse  CC  SB  Wrd

Polling Place

Place Name

Polling Place Directions

Election 2012 General Election



# Your Screen Looks Like This

## Enter Voter's Name

The screenshot shows a web application window titled "Find a Voter (PhoneBank)". At the top, there are three tabs: "Search By Name(Alt-N)", "Local Search by Address (Alt-A)", and "FVRS General Search(Alt-G)". Below the tabs, a text box contains the instruction "Enter All Details in the first box to give the fastest search". To the right of this text box is a note: "Use \"%\" for wildcard". Below the text box are four input fields: "Last-Name (Voter ID):" (with a dropdown arrow), "First-Name:", "Middle Name", and "Date-of-Birth:" (with a date picker). Below these fields is a "D License" field. At the bottom of the window, there are three buttons: "Local Search", "Cancel", and "Clear Request Fields". The "Local Search" and "FVRS Search" buttons are circled in red. A red arrow points from the "FVRS Search" button to the "FVRS General Search(Alt-G)" tab. Another red arrow points from the "Local Search" button to the "Local Search by Address (Alt-A)" tab. A third red arrow points from the "Cancel" button to the "Cancel" text. A fourth red arrow points from the "Clear Request Fields" button to the "Clear Request Fields" text. A fifth red arrow points from the "Show Deleted Voters" checkbox to the "Show Deleted Voters" text. The text "SELECT A SEARCH" is overlaid in large blue letters across the bottom half of the window.

Find a Voter (PhoneBank)

Search By Name(Alt-N) Local Search by Address (Alt-A) FVRS General Search(Alt-G)

Enter All Details in the first box to give the fastest search

Use "%" for wildcard

Last-Name (Voter ID): First-Name: Middle Name Date-of-Birth:

D License

Local Search Cancel Clear Request Fields

FVRS Search

Show Deleted Voters

## SELECT A SEARCH

# This is a Local Search for Michael S. Taylor

**Training DB - Select Voter**

☐ Active ☐ InActive ☐ Pre-Reg ☐ Ineligible ☐ Incomp Pending ☐ Unverified Voter ☐ Deleted Denied

Search For  
Taylor, Michael S B'day D Lic - - - -

Cnty		Name	Address	Sex/Rce/Prt	Birth Date	Prct	City	Voter Id
PAS	A,1	Taylor, Michael S	18424 Holland House LOOP	M 3 Npa	7/20/1964	036.5	Pasco County	111228674
PAS	A,1	Taylor, Michael S	2854 Mingo Dr	M 5 Dem	7/18/1993	036.4	Pasco County	117738458
PAS	A,1	Taylor, Michael S	7728 Blue Spring Dr	M 5 Rep	6/8/1976	070.2	Pasco County	110664930
PAS	A,1	Taylor, Michael S	6910 Tierra Verde St	M 5 Dem	3/20/1972	053.1	Pasco County	106607617
PAS	P,S	Taylor, Michael S	7303 Mahaffey Dr	M 5 Dem	3/20/1972	116.1	Pasco County	309629
HIL	P,FF	Taylor, Michael S	18621 US Highway 41 N	M 5 Npa	9/1/1975	036.1	Pasco County	106680113

Select Cancel



# This is an FVRS Search for Michael S. Taylor

**Training DB - Select Voter**

☐ Active
 ☐ InActive
 ☐ Pre-Reg
 ☐ Ineligible
 ☐ Incomp Pending
 ☐ Unverified Voter
 ☐ Deleted Denied

Search For

Taylor, Michael S
 B'day
 D Lic
 - - - -

Cnty		Name	Address	Sex/Rce/Prt	Birth Date	Prct	City	Vote
BRO	Act	Taylor, Michael S	470 E MCNAB RD APT 8	M 9 DEM	8/16/1992	C020.1	Pompano Beach	11...
BRO	Act	Taylor, Michael S	4112 Amber Ln	M 5 REP	1/20/1955	Q074.0	Weston	10...
BRO	Ina	Taylor, Michael S	2645 Taft St	M 5 DEM	2/20/1958	V022.0	Hollywood	10...
BRO	Act	Taylor, Michael S	8151 SW 3rd St	M 6 DEM	1/29/1973	H010.0	North Lauderdale	10...
BRO	Act	Taylor, Michael S	803 W Oakland Park Blvd APT A 16	M 5 DEM	9/15/1970	D007.0	Oakland Park	10...
HIG	Act	Taylor, Michael S	3114 Peachtree DR	M 5 REP	2/10/1957	17W	Lake Placid	10...
DUV	Act	Taylor, Michael S	5388 Morse Ave	M 5 REP	6/1/1965	1414.1	Jacksonville	10...
BRO	Act	Taylor, Michael S	2201 SW 15th St APT 254	M 5 REP	6/2/1986	A020.0	Deerfield Beach	11...
STJ	Act	Taylor, Michael S	234 Ravenswood Dr	M 5 REP	1/6/1956	505.0	St Augustine	10...
OSC	Ina	Taylor, Michael S	3455 Blossom St	M 5 REP	4/19/1970	105	Kissimmee	10...
M...	Rem	Taylor, Michael S	3710 23rd Ave W	M 5 REP	3/15/1949	43.3	Bradenton	10...
PAS	Act	Taylor, Michael S	18424 Holland House LOOP	M 3 NPA	7/20/1964	036.5	Land O Lakes	11...
DAD	Act	Taylor, Michael S	1480 NE 10Th St	M 3 DEM	12/1/1950	918.1	Homestead	10...

# When Searching for Voters You MUST Interpret the Colors!

**Training Select Voter**

☐ Active
 ☐ InActive
 ☐ Pre-Reg
 ☐ Ineligible
 ☐ Incomp Pending
 ☐ Unverified Voter
 ☐ Deleted Denied

Search For: Johnson, E%
 B'day: 
 D Lic: - - - -

Cnty		Name	Address	Sex/Rce	Prt	Birth Date	Prct	City	Voter Id	
PAS	A,1	Johnson, Eugene L	39616 Meadowood LO...	M	5	Dem	11/26/1960	090.1	Zephyrhills	117700958
PAS	A,1	Johnson, Eugene L	17721 Alexson St	M	5	Rep	2/7/1962	117.1	Pasco County	106443234
PAS	A,1	Johnson, Eugene M JR	5602 Land O Lakes BL...	M	5	Dem	3/26/1952	008.1	Pasco County	106359578
PAS	A,1	Johnson, Eva M	15009 Todd Trl	F	5	Rep	9/7/1963	027.2	Pasco County	106389029
PAS	A,1	Johnson, Evalo	12201 Twin Lake Dr	F	5	Rep	3/29/1934	049.1	Pasco County	106366729
PAS	H...	Johnson, Evelyn	37300 Royal Oak Ln	U	9	Unk	7/5/1915	001.1	Dade City	116063396
PAS	A,1	Johnson, Evelyn L	4435 Pelorus Dr	F	5	Npa	10/16/1929	032.1	Pasco County	106495801
PAS	I,A	Johnson, Evelyn L	3329 Teeside Dr	F	5	Rep	10/9/1922	102.1	Pasco County	106344444
PAS	P,S	Johnson, Evelyn O	11117 Pembroke Ct # 2	F	5	Rep	7/28/1908	059.1	Pasco County	039072
PAS	A,1	Johnson, Evelyn P	14437 Geneva Dr	F	5	Rep	5/24/1942	014.1	Pasco County	106349335
PAS	P,S	Johnson, Evelyn R	5636 Essex Way	F	5	Dem	5/14/1919	095.1	New Port Richey	106329436
PAS	A,1	Johnson, Evie L	5602 Land O Lakes Blvd	F	5	Dem	6/9/1959	008.1	Pasco County	106544985

# What Makes a Registration Ineligible?

- Prior to 2006, moving from one county to another deleted your registration in your old county giving you the status of “ineligible” in that county. If you did not re-register in your new county, you are not registered anywhere in Florida.
- Notification from you per list maintenance that you are no longer residing in Florida, or prior to 2006, your last county of residence. Again, if you did not re-register in your new county after removing yourself from the old county, you are not registered anywhere in Florida.
- Notification that you were convicted of a felony.
- Notification from Vital Statistics that you are deceased.
- Notification from the Clerk of Courts that you had been declared by the court mentally incapacitated.

# If There Are A Lot Of Michael S. Taylors, You Can Sort By Birth Date

**Training DB - Select Voter**

Active InActive Pre-Reg Ineligible Incomp Pending Unverified Voter Deleted Denied

Search For  
Taylor, Michael S B'day D Lic - - - -

**Click**

Cnty		Name	Address	Sex/Rce/Prt	Birth Date	Prc		
BRO	Act	Taylor, Michael S	470 E MCNAB RD APT 8	M 9 DEM	8/16/1992	C020.1	Pompano Beach	11...
BRO	Act	Taylor, Michael S	4112 Amber Ln	M 5 REP	1/20/1955	Q074.0	Weston	10...
BRO	Ina	Taylor, Michael S	2645 Taft St	M 5 DEM	2/20/1958	V022.0	Hollywood	10...
BRO	Act	Taylor, Michael S	8151 SW 3rd St	M 6 DEM	1/29/1973	H010.0	North Lauderdale	10...
BRO	Act	Taylor, Michael S	803 W Oakland Park Blvd APT A 16	M 5 DEM	9/15/1970	D007.0	Oakland Park	10...
HIG	Act	Taylor, Michael S	3114 Peachtree DR	M 5 REP	2/10/1957	17W	Lake Placid	10...
DUV	Act	Taylor, Michael S	5388 Morse Ave	M 5 REP	6/1/1965	1414.1	Jacksonville	10...
BRO	Act	Taylor, Michael S	2201 SW 15th St APT 254	M 5 REP	6/2/1986	A020.0	Deerfield Beach	11...
STJ	Act	Taylor, Michael S	234 Ravenswood Dr	M 5 REP	1/6/1956	505.0	St Augustine	10...
OSC	Ina	Taylor, Michael S	3455 Blossom St	M 5 REP	4/19/1970	105	Kissimmee	10...
M...	Rem	Taylor, Michael S	3710 23rd Ave W	M 5 REP	3/15/1949	43.3	Bradenton	10...
PAS	Act	Taylor, Michael S	18424 Holland House LOOP	M 3 NPA	7/20/1964	036.5	Land O Lakes	11...
DAD	Act	Taylor, Michael S	1480 NE 10Th St	M 3 DEM	12/1/1950	918.1	Homestead	10...

Select Cancel

# To Access a Voter's Record

**Training DB - Select Voter**

☐ Active ☐ InActive ☐ Pre-Reg ☐ Ineligible ☐ Incomp Pending ☐ Unverified Voter ☐ Deleted Denied

Search For  
Taylor, Michael S B'day D Lic - - - -

Cnty		Name	Address	Sex/Rce/Prt	Birth Date	Prct	City	Vote
BRO	Act	Taylor, Michael S	470 E MCNAB RD APT 8	M 9 DEM	8/18/1992	C020.1	Pompano Beach	11...
BRO	Act	Taylor, Michael S	4112 Amber Ln	M 5 REP	1/20/1955	Q074.0	Weston	10...
BRO	Ina	Taylor, Michael S	2645 Taft St	M 5 DEM	2/20/1958	V022.0	Hollywood	10...
BRO	Act	Taylor, Michael S	8151 SW 3rd St	M 6 DEM	1/29/1973	H010.0	North Lauderdale	10...
BRO	Act	Taylor, Michael S	803 W Oakland Park Blvd APT A 16	M 5 DEM	9/15/1970	D007.0	Oakland Park	10...
HIG	Act	Taylor, Michael S	3114 Peachtree Dr	M 5 REP	2/10/1957	17W	Lake Placid	10...
DUV	Act	Taylor, Michael S	5388 Morse Ave	M 5 REP	6/1/1965	1414.1	Jacksonville	10...
BRO	Act	Taylor, Michael S	2201 SW 15th St APT 254	M 5 REP	6/2/1986	A020.0	Deerfield Beach	11...
STJ	Act	Taylor, Michael S	234 Ravenswood Dr	M 5 REP	1/6/1956	505.0	St Augustine	10...
OSC	Ina	Taylor, Michael S	3455 Blossom St	M 5 REP	4/19/1970	105	Kissimmee	10...
M...	Rem	Taylor, Michael S	3710 23rd Ave W	M 5 REP	3/15/1949	43.3	Bradenton	10...
PAS	Act	Taylor, Michael S	18424 Holland House LOOP	M 3 NPA	7/20/1964	036.5	Land O Lakes	11...
DAD	Act	Taylor, Michael S	1480 NE 10Th St	M 3 DEM	12/1/1950	918.1	Homestead	10...

Select Cancel

**Click on it**

**In This Case We Selected Michael S. Taylor  
With DOB 6/2/1986**

# Practical Application

**Search database by name for:**

- **Yourself**
- **Your family member**
- **Your neighbor**
- **Mr. Corley (Brian E.)**
- **Your immediate supervisor/boss**



# Logical Learning Style

- **Logical** (mathematical): You prefer using logic, reasoning and are systematic.
- ★ You can recognize patterns easily, as well as connections between seemingly meaningless content. This also leads you to classify and group information to help you learn or understand it.





# **Understanding Morning Check-In**

# Phone Bankers Arrive at the Election Support Center by 5:45 A.M.

5:45 a.m.



# Pollworkers Arrive at the Polling Place by 6:00 A.M.

They call the phone bank to let us know they are in the building



They begin setting up the equipment and arranging the room



They call us when they are ready to vote or if they have problems



# Our Role is to Log All of Their Calls And Troubleshoot Their Problems



This is our way of monitoring whether or not the polls are being opened on time as mandated by Florida Statute.

We can also send messages to the tech team and key players so they can troubleshoot opening issues with the equipment.



# Why All the Fuss About Logging Calls?

- That first hour is critical to the success of the elections.
- Communication between the pcts, phone bank and tech team need to be as efficient as possible in order to resolve things quickly and be ready for voting at 7:00 a.m.
- We are charged with the responsibility of opening the polls on time and must be accountable.



# Social Learning Style

- **Social** (interpersonal): You prefer to learn in groups or with other people.
  - ★ People listen to you or come to you for advice.
  - ★ You typically like games that involve other people, such as card games and board games, team sports.



# **Describe Your Team**

## **Classify Yourselves by Reaching a Group Consensus**

Your answers should come from your shared personal experiences – real life rather than idealistic concepts which you have read about. Talk among yourselves.

**One thing that represents good service**




**A work ethic that will ensure success**

**What not to do**

**One thing that when done daily makes the world a better place**



# Call Center Pokeno

<b>FVRS</b>	<a href="http://pascovotes.com">pascovotes.com</a>	 /oter Focus-FVRS.lnk	<b>Your Voter Registration</b>	<b>A Voter Information card</b>
<b>Supervisor Of Elections Office</b>	<i>Your Signature</i>	<b>A VOTER REG APP</b>	<b>A Qualification to Register to vote</b>	<b>A complete, valid registration app</b>
<b>TRACY</b>	<b>A Call Center Duty</b>		<b>Absentee Ballot</b>	<b>FVRS</b>
<b>A Call Center Duty</b>	<b>A complete, valid registration app</b>	<i>Your Signature</i>	<b>A Call Center Duty</b>	<b>Supervisor Of Elections Office</b>
<b>A Voter Information card</b>	 /oter Focus-FVRS.lnk	<b>Absentee Ballot</b>	<a href="http://pascovotes.com">pascovotes.com</a>	<b>A VOTER REG APP</b>

Taking in-county  
address changes  
is....

**A  
Call Center  
Duty**

What becomes  
subject to list  
maintenance and  
the chance of be-  
ing purged if you  
neglect to update  
it or regularly use  
it?

**Your Voter  
Registration**

What should you  
complete if you  
need a replace-  
ment information  
card?

**A VOTER  
REGISTRATION  
APPLICATION**

Where you can  
find voter regis-  
tration statistics.

[pascovotes.com](http://pascovotes.com)





# Phone Bank Jeopardy

## Round 1

Election Day	Elections 101	Phone Bank Duties	First Hour Election Morning	Call Track
<u>5</u>	<u>5</u>	<u>5</u>	<u>5</u>	<u>5</u>
<u>10</u>	<u>10</u>	<u>10</u>	<u>10</u>	<u>10</u>
<u>15</u>	<u>15</u>	<u>15</u>	<u>15</u>	<u>15</u>
<u>20</u>	<u>20</u>	<u>20</u>	<u>20</u>	<u>20</u>
<u>25</u>	<u>25</u>	<u>25</u>	<u>25</u>	<u>25</u>

# Elections 101 for 5 points . . .

---

Vote-by-mail  
Early  
On Election Day



## 5 Point Answer

---

What are the three ways  
to vote.



# Solitary Learning Style

- **Solitary** (intrapersonal): You prefer to work alone and use self-study.
  - ★ You prefer to work on problems by retreating to somewhere quiet and working through possible solutions.
  - ★ Peak performers in any field often have a good solitary style behind other more dominant styles.

# Solitary Learning Style

## Understanding Voter Registration Quiz

1. T F Bookclosing date was October 9, 2012.
2. T F If a voter submitted an incomplete application before bookclosing, as long as a completed application is filed in the Supervisor of Elections office before election day, the person is eligible to vote.
3. T F According to Florida Statute, it is not necessary to answer the questions regarding citizenship, felony conviction and mental competence on the voter registration application.
4. T F Moving from Hillsborough County to Pasco County is as simple as changing your address, even if your registration in Hillsborough County is inactive.
5. T F A voter may change his party and vote his new party at any time.
6. T F If a voter has pre-registered at age 17, and his birthday is November 6th, he can vote in the General Election.
7. T F The Florida Voter Registration System (FVRS) is a statewide database of voters who are actively registered in more than one county.

## Phone Bank Recall

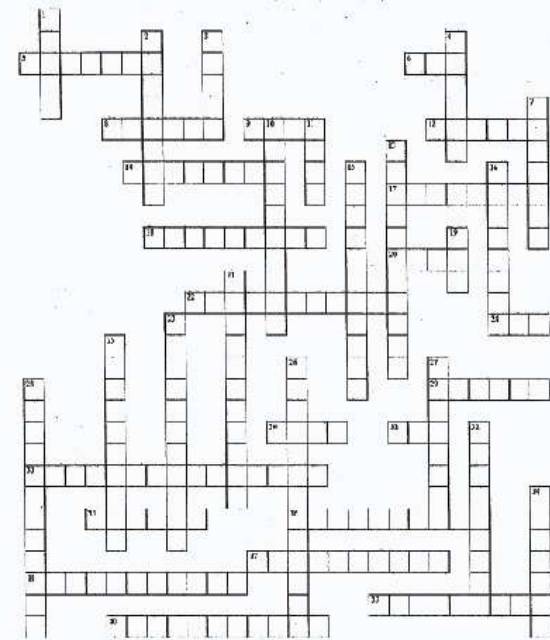
I D D T A B C T T O E S S E R D D A D H  
 N T A S U P E R V I S O R T I A D I L T  
 T A P S D A L I O I U U O O O E L R I N  
 E A P N E L I U L V T I T V G I L I R E  
 R F L O P S G M N A E O P R E C I N C T  
 R F I I L E I T N T H C U E N M E A T A  
 O I C T C L B G A P V P T D O N O O N R  
 D R A C N O I T A M R O F N I P L D S R  
 N M T E C S L N E E V R D U T L R O E T  
 P A I L D E I O G Y I E R I A P L E R M  
 E T O E E R T A L P P N C B R A I L I C  
 R I N L T D Y R B U L A E O T L N O N O  
 T O D A C O A C T S L A V L S O A P R V  
 G N O R E E V Y I S E I C C I L C M A E  
 C R E E T L L G C I S N P E G G T E E R  
 E E I N O I T A C I F I T N E D I E D V  
 L G R E R T N U O C E R U E R N V B I O  
 E L I G P H O N E B A N K N E I E C L T  
 E S A B A T A D F A E C A N D I D A T E  
 A I I S O L I C I T O R T V A H T I E D

provisional  
 candidate  
 absentee  
 identification  
 supervisor  
 eligibility  
 undervote  
 purged  
 phonebank  
 solicitor  
 early vote  
 ineligible

polling place  
 ballot  
 address  
 optical scan  
 EViD  
 vote  
 modem  
 database  
 elections  
 recount  
 photo ID

precinct  
 application  
 information card  
 deputy  
 protected  
 overvote  
 signature  
 general election  
 registration  
 affirmation  
 inactive

## Phone Bank Recall



### ACROSS

- 5 Good in \_\_\_\_\_, Good to Go!
- 6 Americans with Disabilities Act
- 8 One responsible for maintaining order at the polling place
- 9 Electronic voter identification device
- 12 The type of privacy in Florida
- 14 Geographical voting region
- 17 Sister of voter who has not voted in a while
- 18 Your username and password
- 20 Color of an inactive voter
- 22 A ballot cast conditionally
- 24 Voter registration collection agency
- 29 Paper issued at polling place to each voter
- 30 Florida Voter Registration System
- 31 Division of Elections
- 33 Every voter is mailed one
- 35 Indicates voter has not submitted a complete application
- 36 Status of invalid voter registration application
- 37 An acceptable form of ID at the polls
- 38 Form used to register to vote
- 39 One whose name is on the ballot
- 40 Party affiliate allowed to polling place

### DOWN

- 1 Requires clemency to vote
- 2 An acceptable form of ID at the polls
- 3 What is at issue in FL primary elections
- 4 Type of ballot mailed to all voters prior to an election
- 7 Determinant of a voter's precinct
- 10 Resource that shows a log of voters' registration activity
- 11 A term that describes two precincts which vote in the same polling place
- 13 Determining this is a primary responsibility of phone bank
- 15 A requirement for registration
- 16 A tool for doing voter searches indicated by the symbol%
- 19 Color of business address
- 21 The 29 day period prior to an election
- 23 Paperwork completed at the polls under oath
- 25 Temporary employee that conducts elections
- 26 An acceptable ID at the polls
- 27 A ballot cast by mail
- 28 Physical voting location
- 32 Term used to indicate voter's address is exempt from public record
- 34 The earliest age of pre-registration

## **Using the Website**

### **Call Center Training Exercises – July 6, 2012**

- 1. How many registered Republican voters are in Pasco County? How many Democrats?**
- 2. Where is the Land O' Lakes Office located?**
- 3. How do I access the on-line voter registration application?**
- 4. What are the early voting hours in West Pasco Government Center?**
- 5. I live in Lutz. Where is the closest early voting site?**
- 6. Where can I find a complete list of Government Officials?**
- 7. How can I contact the League of Women Voters?**
- 8. How can I get in touch with someone about working at the Democratic Party headquarters office or participate in campaigning?**
- 9. How many registered voters are in School Board District 5?**
- 10. What senate district is Precinct 106 in?**
- 11. I live at 38849 Daughtery Rd. Where do I vote?**
- 12. What was the voter turnout in Pasco County in the 2010 primary?**
- 13. Where can I see district maps of Pasco County?**
- 14. I lost my sample ballot. Can I get another one?**



# Aural Learning Style

- [Aural](#) (auditory-musical): You prefer using sound and music.





# **Understanding Voter Registration**



# What Do I Need to Know About Voter Registration?

- Once you're registered in the State of Florida, there is no need to re-apply unless you have left the state and returned, or your record has been purged due to inactivity.
- Your registration remains active simply by voting and updating your address if you have moved.



# What Do I Need to Know About Voter Registration?

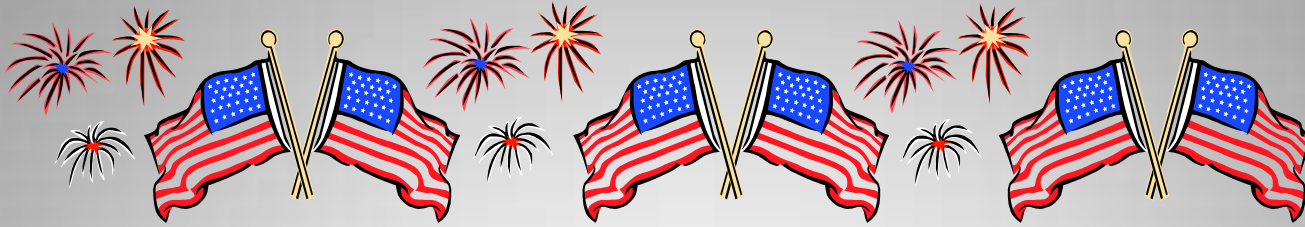
- Most voters register through the Department of Highway Safety and Motor Vehicles (DHSMV) when they get their driver license.
- The voter records throughout the state are in one big database called the Florida Voter Registration System (FVRS). The county no longer has sole possession.
- In addition to DHSMV and the elections office, there are other agencies which are official voter registration agencies, i.e.:
  - Libraries
  - Public Assistance Offices
  - Armed Forces
  - Disabilities Offices
  - Qualifying Educational Institutions



# What Are the Qualifications to Register to Vote?

- At least 18 years of age
- A citizen of the United States
- A legal resident of the State of Florida
- A legal resident of the county in which you seek to be registered.





- **Voters may pre-register to vote at age 16, or upon receiving a FL Driver License, whichever comes first. However, they are not eligible to vote until they are 18 years old.**
- **If you turn 18 on election day, as long as you are pre-registered, you can vote.**

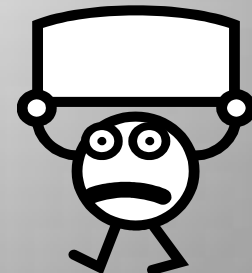


# Who Must Complete a Voter Registration Application?

- Voters who just moved to Florida.
- Voters voting for the first time in FL
- Voters making a signature update
- Voters whose previous registration has been purged.

The following voters may use a voter registration application, or submit the request in writing and include their signature, and date of birth or voter registration number:

- Voters making a name change
- Voters making a party change
- Voters moving from another county



# How Do I Fill This Thing Out?

A valid voter registration application must:

- Have a mark in the check box to questions regarding citizenship, felony conviction and mental incapacitation.
- Complete name
- Date of birth
- Valid, legal residence address
- Your Florida Driver License #, Florida ID#, or if applicant has not been issued a DL or ID card, the last four digits of social security #.
- Signature





Everything highlighted is mandatory in order for the application to be valid. (Copy in your manual)



## Florida Voter Registration Application

**TO REGISTER, YOU MUST:**

- Be a citizen of the United States of America. (Box 2)
- Be a Florida resident. (Box 8)
- Be 18 years old. (You may pre-register if you are 17 or if you have a valid driver's license before your 17th birthday.) (Box 5)
- Not be adjudicated mentally incapacitated with respect to voting unless that right is restored. (Box 4)
- Not be a convicted felon unless you have had your civil rights restored. (Box 2)
- Provide your current and valid Florida driver's license number or Florida identification card number. If you do not have a current and valid Florida driver's license or identification card, you must provide the last four digits of your Social Security number. If you do not have a Florida driver's license number, Florida identification card number or Social Security number, write "NONE" in the box. (Box 6)
- Complete all information in the black boxes on this application. (Boxes 2, 3, 4, 5, 6, 7, 8, 10)

**YOU CAN USE THIS FORM TO:**

- Register to vote in the State of Florida
- Change name or address
- Replace your expired, lost or stolen Voter Information Card
- Register with a political party or change party affiliation
- Update your signature

**DEADLINE INFORMATION**

If this is a new registration application in Florida, the date the completed application is postmarked or hand delivered (aka, driver's license office, a voter registration agency, an armed forces recruitment office, the Division of Elections, or the office of any supervisor of elections in the state) will be your registration date. You must be registered for at least 23 days before you cast a ballot in an election. If your application is complete and you are qualified as a voter, a voter information card will be mailed to you.

**PARTY AFFILIATION (BOX #12)**

If you wish to register with a major political party, place an "X" in the box next to the desired major party. If you wish to register with a minor political party, place an "X" in the box preceding "minor party" and then print the name of the desired minor party. For a list of all political parties registered in Florida, go to the Division of Elections' web site: <http://elections.state.fl.us/elections/parties.shtml>. If you do not wish to

**register with any political party, place an "X" in the box preceding "NONE."** Florida is a closed primary election state. Therefore, to vote in a primary election for partisan candidates, you must be a registered voter in the party for which a primary is being held. Regardless of party affiliation, all registered voters can vote on issues and non-partisan candidates.

**NOTICE**

The office at which you register or your decision not to register, your SSN, your FL DL#, and your FL ID card will remain confidential and will be used only for voter registration purposes.

**NOTE**

If the information on this application is not true, the applicant can be convicted of a felony of the third degree and fined up to \$5,000 and/or imprisoned for up to five years.

**QUESTIONS**

Contact the office of your county supervisor of elections for additional information. Contact information is on the website for the Division of Elections: <http://elections.state.fl.us/elections/index.shtml>

**INFORMACIÓN EN ESPAÑOL**

Si desea saber a la oficina del supervisor de elecciones de su condado o le interesa obtener este formulario en español.

**PLEASE COMPLETE THE APPLICATION BELOW. PLEASE PRINT USING A BLACK BALLPOINT PEN.**

1) Black boxes must be completed on the application below for registration to be valid. 2) Return this completed application to the office of your supervisor of elections. 3) If you are a first-time voter in this state applying by mail to register to vote and you have not been issued a FL DL#, FL ID#, or SSN, include a copy of your ID with the application (see Special Identification Requirements for additional information required). 4) Mail with first-class stamp.

**FLORIDA VOTER REGISTRATION APPLICATION**

OFFICIAL USE ONLY  
DO NOT WRITE

<b>1</b>	Check boxes that apply: <input type="checkbox"/> New Registration <input type="checkbox"/> Address Change <input type="checkbox"/> Party Change <input type="checkbox"/> Name Change <input type="checkbox"/> Card Replacement <input type="checkbox"/> Signature Update		
<b>2</b>	Are you a citizen of the United States of America? Yes <input type="checkbox"/> No <input type="checkbox"/> (If NO, you cannot register to vote)		
<b>3</b>	<input type="checkbox"/> I affirm I am not a convicted felon, or if I am, my rights relating to voting have been restored.		
<b>4</b>	<input type="checkbox"/> I affirm I have not been adjudicated mentally incapacitated with respect to voting or, if I have, my rights to vote have been restored.		
IF YOU ANSWERED NO TO QUESTION 2, OR IF YOU ARE UNABLE TO AFFIRM THE STATEMENTS IN BOXES 3 AND 4, YOU ARE INELIGIBLE TO REGISTER TO VOTE. DO NOT COMPLETE THIS APPLICATION.			
<b>5</b>	Date of Birth (MM/DD/YYYY) / /		
<b>6</b>	If you have a current and valid FL DL# or FL ID card, you must provide the number in this box. If you do not have either, provide the last 4 digits of your SSN. If you have not been issued a FL DL#, FL ID card, or SSN, write "NONE".		
<b>7</b>	Last Name	First Name	Middle Name/Initial
<b>8</b>	Address Where You Live (Legal Residence) (household)	City	Country of Legal Residence State Zip Code
<b>9</b>	Mailing Address (If Different from Above)	City	Country State Zip Code
<b>10</b>	Address Last Registered to Vote	City	Country State Zip Code
<b>11</b>	Former Name (if Mailing Name Change) (Day Phone Number (optional))		
<b>12</b>	Party Affiliation (Check only one) <input type="checkbox"/> Democratic Party <input type="checkbox"/> Republican Party <input type="checkbox"/> minor party (write registered party name) <input type="checkbox"/> NONE		
<b>13</b>	Race/Ethnicity (Check only one) <input type="checkbox"/> American Indian/Alaskan Native <input type="checkbox"/> Asian/Pacific Islander <input type="checkbox"/> Black, not Hispanic <input type="checkbox"/> Hispanic <input type="checkbox"/> White, not Hispanic		
<b>14</b>	Sex <input type="checkbox"/> M <input type="checkbox"/> F	Do you need voting assistance at the polls? <input type="checkbox"/> Yes <input type="checkbox"/> No	Are you interested in being a poll worker? <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>15</b>	Are You: <input type="checkbox"/> Active Duty Military/Member Marine <input type="checkbox"/> Dependent of Active Duty Military/Member Marine <input type="checkbox"/> U.S. Citizen Currently Residing Outside the U.S.		
<b>16</b>	<p><b>DATE:</b> I do solemnly swear (or affirm) that I will protect and defend the Constitution of the United States and the Constitution of the State of Florida, that I am qualified to register as an elector under the Constitution and laws of the State of Florida, and that all information provided in this application is true.</p> <p><b>SIGNATURE:</b> Sign or mark an "X" in box below. (Signals without signature or mark of applicant)</p> <p style="text-align: center; font-size: 2em; font-weight: bold;">X</p> <p style="text-align: right;"><b>Date:</b></p>		

# What Does Bookclosing Mean?

- Voter registration closes 29 days prior to the election. It is a deadline.
- If you have never registered to vote in Florida, or your FL registration has been purged, is incomplete, or in delete status, you must have a completed application on file before book closing date.
- If you wish to change party, your request must be on file in the elections' office by bookclosing date.



# Why Do the Books Close?

There has to be a cut-off date in order to complete data entry and prepare the voter registration database of qualified voters, including the precinct registers which are paper rosters listing the qualified voters per precinct.

Now that we use EViDs, these paper registers are used only if there is a power outage.



# Voters Who Registered After Bookclosing Will Have this Message

**Training Phone Bank Display**

Voter Name: Kala J Hankins  
Gender: F  
120484385

Residence Address: 37121 Lock St  
City: Dade City  
Zip Code: 33523

Mailing Address: PO BOX 1782  
Dade City, FL 33526

Date of Birth: 07/15/1986

Race: 5\White, not Hispanic

Status/Reason: 1(A) Active Voter

Party: Dem  
Regn Date: 10/17/2012

☐ Need Assistance?

Voter's Location in the precinct register:  
**Registered Late**

Election: 2012 General Election

Districts:  
Precinct: 003.1  
Cng: 12  
Sen: 18  
Hse: 38  
CC: 1  
SB: 1

Polling Place: 003  
**Pasco-Hernando Community College**  
36727 Blanton Rd Dade City, FL 33523

Polling Place Directions:  
East-side of Hwy 41, West of Lock St and 21st Street intersection

Buttons:  
Look up an address  
Show Voter Audit  
Find another voter  
Exit

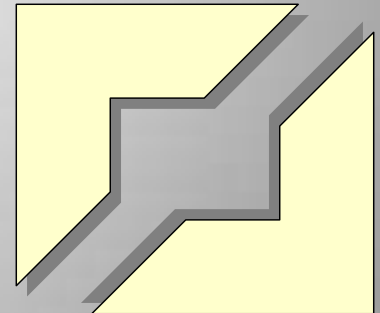
**This voter is  
ineligible to vote in  
the General  
Election**

# Incomplete Applications

- Applications that are missing required information are flagged as incomplete by the data entry staff.
- Applicants are sent a new application with a letter explaining what was incomplete.

Voters are instructed in the letter to return the second application to the elections office with the missing information in order for their registration to be validated.

All information **MUST BE** received by bookclosing which is 29 days prior to an election.



# Incomplete Registrations are in Yellow on Voter Look-Up

**Select Voter**

☐ Active   ☐ InActive   ☐ Pre-Reg   ☐ Ineligible   ☐ Incomp Pending   ☐ Unverified Voter   ☐ Deleted Denied

Search For  
Cozzetto, Kimberly   B'day   D Lic   - - - -

Cnty	Name	Address	Sex/Rce/Prty	Birth Date	Prct	City	Voter Id	
PAS	H,12	Cozzetto, Kimberly S	5645 20Th St	F 5 Dem	6/1/1969	090.1	Zephyrhills	118245168

Select   Cancel

# An “Incomplete” Voter Will Have These Messages

**Training Phone Bank Display**

Voter Name: Matthew C Johnson  
Gender: M  
119247204

Residence Address: 13432 Tommy Trl  
City: Hudson  
Zip Code: 34669

Mailing Address:

Date of Birth: 09/10/1995

Race: 5\White, not Hispanic

Status/Reason: Incomplete: Incomplete: DLN and SSN4 were

Party: Npa  
Regn Date: 11/16/2011

Need Assistance?

Voter's Location in the precinct register:  
**Ineligible Voter**

Districts:

Precinct	Cng	Sen	Hse	CC	SB	W	County
107.1	12	17	38	1	1		

Polling Place: 107

**New River Branch Library**  
34043 State Road 54 Zephyrhills, FL 33543

Polling Place Directions:  
North side of SR 54, West of Eiland Blvd, East of New River Rd;  
between Westside Baptist Church and Point Cypress Blvd

Look up an address Show Voter Audit

Find another voter Exit

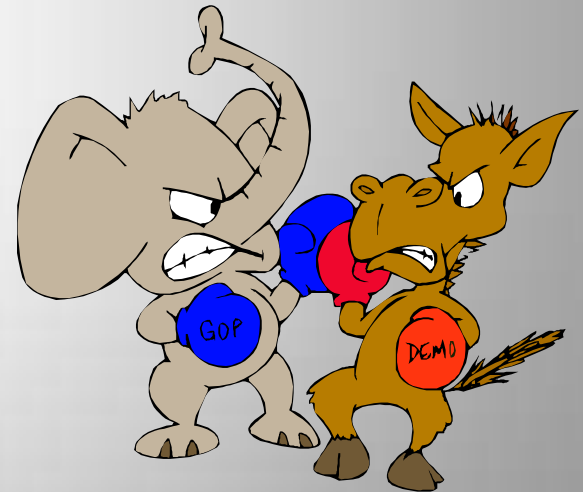
Election: 2012 General Election

This voter is  
ineligible to vote in  
the General Election.

# I Don't Know What Party To Claim!

- Florida is a “closed primary” state.
- You **MUST** vote your party in the primaries. The parties elect their own candidates.
- In the General Election, party is not an issue. Everyone votes the same ballot.

If you claim a minor party or no party affiliation, in the primaries, you will only vote on issues (referendums and amendments) and non-partisan candidates (such as county judges and school board).





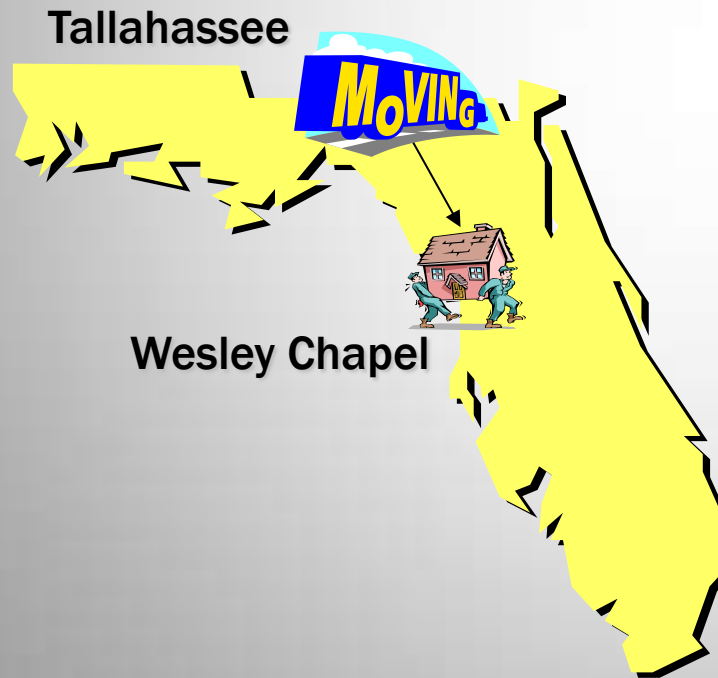
Voters already registered in Florida  
that just moved to Pasco County  
must submit an address change, . . .  
**BUT, they are not subject to bookclosing**



# Good in Florida - Good to go...



On Election Day, Floridians with a registration that is in active or inactive status, **may complete an application at the polls and vote in Pasco County** if they are now residing here.



**HOWEVER . . .**

***They are  
required to vote  
a provisional  
ballot!***

## **NOTE:**

**A large part of your responsibility on election day will be to look-up voters on the statewide database to see if they have a “good” registration in Florida. That will determine their eligibility to vote.**

**In the last 6 minutes you  
were exposed to about  
55 facts.**

**On your sheet of paper list as  
many of these facts as you can  
recall.**

# Civics 101

- **What form of government does the United States have?**  
Under its Constitution, the United States is a federal, representative, democratic republic at the local, state, and national levels.
- *Federal* because power is shared by the local, state, and national governments
- *Representative* because delegates are elected by the people by free and secret ballot
- *Democratic* because the people govern themselves
- *Republic* because the U.S. government derives its power from the will of the people

# Civics 101



## The Three Branches of U.S. Government:



**Executive Branch:** Headed by the president. The president carries out federal laws and recommends new ones, directs national defense and foreign policy, and performs ceremonial duties. Powers include directing government, commanding the Armed Forces, dealing with international powers, acting as chief law enforcement officer, and vetoing laws.



**Legislative Branch:** Headed by Congress, which includes the House of Representatives and the Senate. The main task of these two bodies is to make the laws. Its powers include passing laws, originating spending bills (House), impeaching officials (Senate), and approving treaties (Senate).



**Judicial Branch:** Headed by the Supreme Court. Its powers include interpreting the Constitution, reviewing laws, and deciding cases involving states' rights



# Civics 101

By creating three branches of government, the delegates built a "check and balance" system into the Constitution. This system was built so that no one branch of our government could become too powerful.





# Civics 101



- There are 100 Senators in the Federal Government – 2 per state. The term is 6 years.
- There are 435 Representatives in the Federal Government – the amount allotted to each state is determined per the US Census. The term is 2 years.

Each state is broken down into [congressional districts](#) and there is one representative for each district. Every state has at least one congressional district. With each new [census](#), the number of districts (and representatives) in each state is then adjusted.

# Branches of Government In Florida

Guess What?

Florida's government is also divided into three branches:

- **Executive**
- **Legislative** – 120 Representatives (2 year terms) \*  
40 Senators (four year terms) \*\*
- **Judicial**



The Governor, as head of the executive branch, tells the legislators, in a speech at the beginning of session, the state issues that he has determined need to be worked on during that session. The Lieutenant Governor helps the Governor to keep those issues in the minds of the legislators. The executive branch executes the laws. The judges and justices of the judicial branch determine the facts, interpret the law, and make rulings in cases brought to court. The legislative branch has exclusive law-making power and determines the general policies by which the problems of society are to be met. It may delegate limited rulemaking power to some executive agencies.

\* four two-year terms (8 years)

\*\* two consecutive four-year terms (8 years)

# Best Practices Workshop

## Lunch Time



# The Changes EViDs Will Bring



## BEFORE:

- ❑ Voter not in register?
- ❑ Is voter eligible?
- ❑ Is their new address a valid one?
- ❑ What polling place is their new address in?
- ❑ What are the directions to the new polling place?

# The Changes EViDs Will Bring



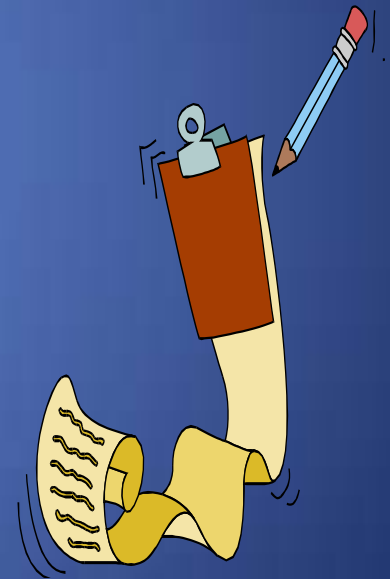
## AFTER:

- ❗ Voter was mailed a ballot
- ❗ Voter has already voted
- ❗ Voter's birthdate is wrong
- ❗ Voter is presenting a Michigan DL
- ❗ Voter was last registered in Polk Co
- ❗ Voter claims they registered
- ❗ EViD says residence address is not valid

# Phone Bank Duties



Arrive by 5:45  
a.m. to assist  
with morning  
check-in of  
polling  
Places.





After the polls open  
at 7:00 a.m.—



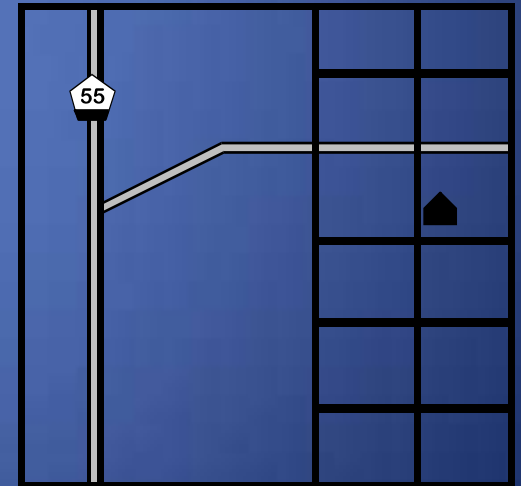
Field calls from EViD  
operators and precinct  
supervisors regarding  
voter registrations and  
eligibility.





Validate addresses that  
the EViD does not  
automatically validate,  
and

ensure voters  
are voting  
in the correct  
precinct.





Make the final determination on voter eligibility when EViD Operators receive these messages on voter registration records i.e.:

- Absentee Ballot Issued
- Challenged: Must Vote a Provisional
- Call Phone Bank
- Voted Early
- Voted Absentee
- Voted Provisional



# PHONE BANK MISSION

Simply stated, the phone bank's responsibility is to determine:

- IF a voter is eligible  
and if eligible...
- Where (in which precinct)

# When Researching Voters ...

There are only three resolutions to any situation:

- Voter **IS NOT** eligible
- Voter **IS** eligible:
  - in the precinct that is calling
  - or in another precinct

# What Kind of Questions Will The Pollworkers Ask?



Mr. So & So isn't coming up in the EViD and he's sure he's registered.



Mr. and Mrs. So & So have a new address the EViD will not accept.



The EViD says this voter has been issued an absentee ballot.



The EViD says voter's party not voting

# What is an EViD?

The **EViD** electronic poll book system is used by poll workers to check in voters during early voting and on election day.

EViD streamlines the check-in of voters at voting sites, alleviating the need for bulky paper registers.



Each **EViD** station is a self-contained system with a touch screen, signature pad, magnetic stripe reader, keyboard and on-board voter registration file.



Voting activity is recorded and conveyed to the election main office at near real-time speed. The **EVIDs** are continuously updated during the voting period with voter registration changes and voting activity.





# Why Do Pollworkers Use Them?

1. Voters who are eligible to vote in the election are allowed to vote promptly.
2. Voters receive the correct ballot on which they are eligible to vote.
3. Poll workers can easily change a voter's name or address on the voter registration system.

Hint .... Remember, determining eligibility is our primary function.

# ...And Why Do I Have To Know This?

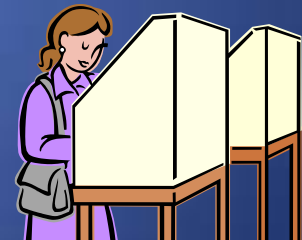
1. You will be fielding calls from the Help Desk and Precinct Supervisor who are at the polling places.
2. You are their “go to” after they have expended all their resources.



Phone Bank



EViD Specialist



# Other Responsibilities

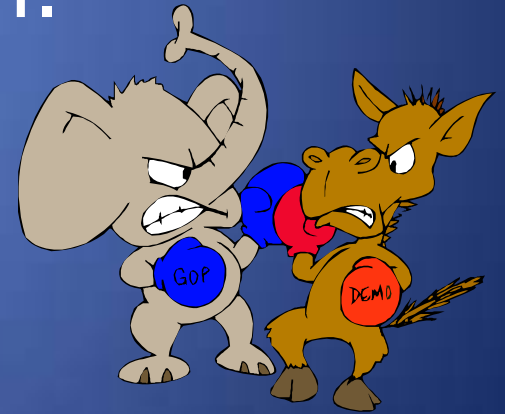
A large part of your responsibility on election day will be to look-up voters on the statewide database to see if they have a “good” registration in Florida.

The EViDs communicate with the local database only

# Other Responsibilities

A part of your responsibility on Primary Election day may be to look-up voters who are disputing their party affiliation.

Because it always happens on Primary Election Day!



# What Resources Will I Use to Answer the Tough Questions?

The Florida Voter  
Registration  
Database

# Remember....Our Task On Election Day is to....

Field calls from the  
Help Desk when  
they are unable to  
process a voter.





# EViD Messages Which Require the Help Desk to Call the Phone Bank

- Absentee Ballot Issued
- Any indication that voter has already voted, i.e. absentee, provisional, early.
- Voter's Party Not Voting
- Voter is ineligible
- Call Phone Bank - There is an issue with this voter's record which needs clarification.



# Will Your EViD Operators Make Address Changes??

## Pasco's Do and Here's How and Why

**MAKING AN ADDRESS CHANGE: Valid Address at the  
Correct Precinct...**

The screenshot shows a software interface for "Name and Address Verification". The title is "Ask voter for his/her residence address". Below this, it asks "Does Voter's name and address match the information below?". The form displays the following information:

Name	Date of Birth
P H Brock	04/05/1965

Below the table, the residence is listed as "37402 Church Ave Dade City, FL 33525". At the bottom of the form, there are three buttons: "Yes", "No", and "Wrong Voter". The "No" button is circled in red, indicating the correct action to take when the address is not valid at the correct precinct.



# Touch Name/Address Change

## Touch Clear Address

2008 4:25:16 PM

Verify Voter Information

Voter Name: Brock, P H      Registration: 106421765

Residence Address: 37402 Church Ave Dade City, FL 33525

Date of Birth: 04/05/1965      Gender: Male

Race: White, not Hispanic      Party: Rep

Regn Date: Aug 24, 1992

Status/Reason: 1(A) Active Voter

Voter's Location in the precinct register:  
Prc = 001.1    Style = R-001

**Name/Address Change**

Wrong Voter

Touch Voter's Location to see enlarged window.

001 PAS001

Clerk 9/20

Enter Voter Information

First Name: P      Middle Name: Hutchison      Last Name: Brock      Style: [v]

Nbr: 37402      Suf: [v]      Dir: [v]      Street Name: Church      Type: Ave      Dir: [v]      Suf: [v]      Unit Type: [v]      Nbr: [v]

City Name: Dade City      Zip Code: 33525      +4: [v]

Change Mailing Address

Find Address      **Clear Address**

OK      Cancel

sc F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12

# Touch Yes

**Clerk**  
7/19/20

Enter Voter Information

First Name: P Middle Name: Hutchison Last Name: Brock Style: [v]  
Nbr: 37402 Suf: [v] Dir: [v] Street Name: Church Type: Ave Dir Suf: [v] Unit Type: [v] Nbr: [v]  
City Name: Dade City  
Change Mailing Address

Alert...

Are you sure you want to clear all address fields?

Yes No

Clear Address Cancel

EVID750549 001 First Baptist Church PAS0025 Voting Passes: 6

**Clerk**  
7/19/20

Enter Voter Information

First Name: P Middle Name: Hutchison Last Name: Brock Style: [v]  
Nbr: [v] Suf: [v] Dir: [v] Street Name: [v] Type: [v] Dir Suf: [v] Unit Type: [v] Nbr: [v]  
City Name: [v] Zip Code: [v] + 4  
Change Mailing Address

Find Address Clear Address OK Cancel

Esc F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12  
% 1 2 3 4 5 6 7 8 9 0 - = ←

# Touch Find Address

**Enter Voter Information**

Clerk 7/9/20

First Name: P Middle Name: Hutchison Last Name: Brock Style: [dropdown]

Nbr: [ ] Suf: [ ] Dir: [ ] Street Name: [ ] Type: [ ] Dir: [ ] Suf: [ ] Unit Type: [ ] Nbr: [ ]

City Name: [ ] Zip Code: [ ] +4

Change Mailing Address

**Find Address** (circled in red) Clear Address OK Cancel

Esc F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12

% 1 2 3 4 5 6 7 8 9

If an exact match is not found in the database, select the correct street from a selection on the screen.

**Find Residence Address**

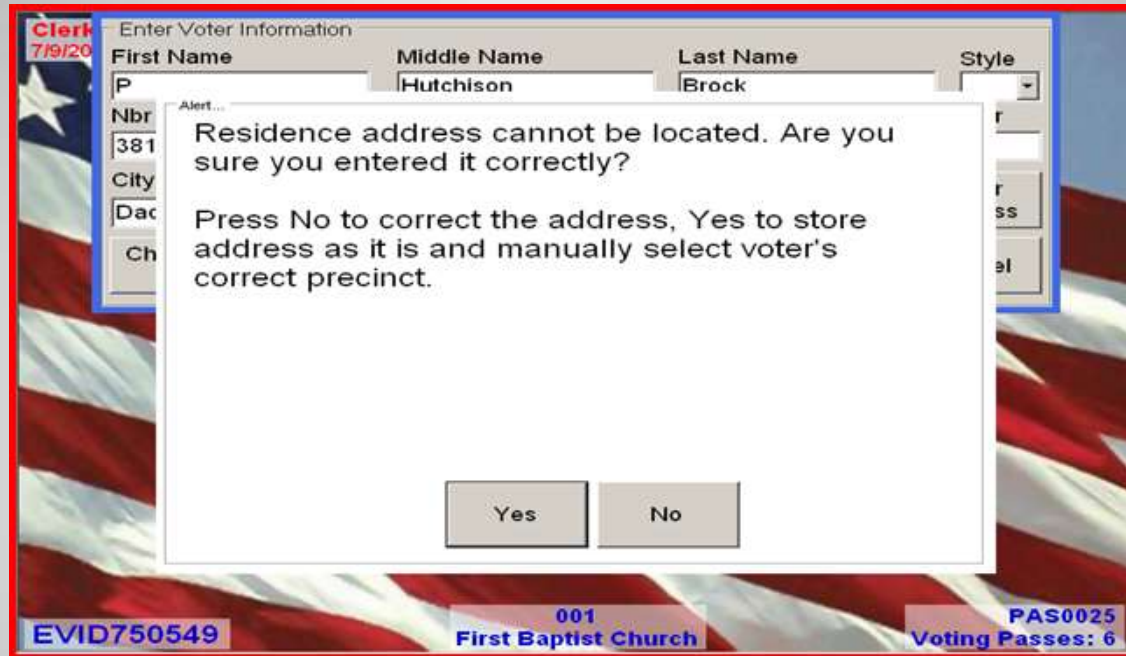
Enter Street Number and Street Name only

11045 Boug

**OK** (circled in red) Cancel

Bougainvillea Ave, Dade City, FL 33525	Bougenville Dr, New Port Richey, FL 34652	Bougenville Dr, Port Richey, FL 34668	Bough Rd, Zephyrhills, FL 33541	Boulder Dr, New Port Richey, FL 34653
Boulder Creek Ln, Hudson, FL 34667	Boulder Crest Pl, Land O Lakes, FL 34639	Boulder Run Loop, Wesley Chapel, FL 33544	Bounty Ln, Zephyrhills, FL 33542	Bounty St, New Port Richey, FL 34654
Bouquet Ct, Land O Lakes, FL 34637	Bourbon St, New Port Richey, FL 34654			

**If an invalid address is entered, you will see an alert message.**



**NEVER touch Yes if the address cannot be located!**

**The phone bank may direct you to complete a manual voting pass (orange) and you would touch cancel to back out of changing the address.**



There is the  
added bonus  
of backup  
paperwork  
+ editing  
by NVRA staff.

PASCO COUNTY MULTI-PURPOSE POLLING PLACE AFFIRMATION									
<b>1. COMPLETED BY POLLWORKER</b>					Pollworker Initials _____ Precinct Number _____				
A. Voter's Last Name _____ First _____ M.I. _____ Registration # _____ or _____ Date of Birth _____									
B. Check One <input type="checkbox"/> Operator could NOT find voter <input type="checkbox"/> Person IS on voter file									
C. Check reason(s) for "Refer to Clerk"									
<input type="checkbox"/> Name/Address Change		<input type="checkbox"/> Voter has been mailed Absentee Ballot		<input type="checkbox"/> Challenged Voter					
<input type="checkbox"/> Protected		<input type="checkbox"/> Signature Rejected		<input type="checkbox"/> Pre-Filed					
<input type="checkbox"/> Assistance Required		<input type="checkbox"/> No Identification Provided		<input type="checkbox"/> At Polls					
<input type="checkbox"/> On File		<input type="checkbox"/> Pending Voter		<input type="checkbox"/> Other _____					
<input type="checkbox"/> Requested at Polls									
<input type="checkbox"/> Voter has Already Voted									
<b>2. COMPLETED BY POLLWORKER (Phone Bank # 1-800-272-3250)</b>									
Election Date _____					Phone Bank Contact _____				
<input type="checkbox"/> Voter IS Eligible to Vote - Party _____ (voter cannot change party at polls)									
<input type="checkbox"/> Yes, voter votes in this precinct									
<input type="checkbox"/> Yes, but voter does NOT vote in this precinct. New Precinct Number _____									
New Polling Place / Address _____									
(Give completed affirmation to voter and direct voter to NEW precinct.)									
<input type="checkbox"/> Voter NOT eligible to vote (reason) _____									
<input type="checkbox"/> Voter votes a provisional ballot (reason) _____									
Provisional Ballot Tracking Number _____					Ballot Style _____				
Pollworker Signature _____									
<b>3. SIGNATURE DIFFERENCE (F.S. 101.49) COMPLETED BY VOTER AND POLLWORKER</b>									
I do solemnly swear (or affirm) that my name is _____									
that I am _____ years old; that I was born in the State of _____; that I am registered to vote;									
that I am a qualified voter of the county and state aforesaid and have not voted in this election.									
Signature of Voter _____									
Sworn to and subscribed before me this _____ day of _____, A.D. _____									
Pollworker Signature _____									
<b>4. COMPLETED BY VOTER - CANNOT BE USED FOR PARTY CHANGE ON ELECTION DAY</b>									
1. Check boxes that apply: <input type="checkbox"/> New Registration <input type="checkbox"/> Address Change <input type="checkbox"/> Party Change <input type="checkbox"/> Name Change <input type="checkbox"/> Card Replacement <input type="checkbox"/> Signature Update									
2. Are you a citizen of the United States of America? Yes <input type="checkbox"/> No <input type="checkbox"/> (If NO, you cannot register to vote)									
3. I affirm I am not a convicted felon, or if I am, my rights relating to voting have been restored.									
4. I affirm I have not been adjudicated mentally incapacitated with respect to voting or, if I have, my right to vote has been restored.									
IF YOU ANSWERED NO TO QUESTION 2 OR IF YOU ARE UNABLE TO AFFIRM THE STATEMENTS IN BOXES 3 AND 4, YOU ARE ELIGIBLE TO REGISTER TO VOTE. DO NOT COMPLETE THIS APPLICATION.									
5. Date of Birth (MM/DD/YYYY) _____ / _____ / _____									
6. If you have a current and valid FL, DMV or FL ID card, you must provide the number in this box. If you do not have either, provide the last 4 digits of your SSN. If you have not been issued a FL, DMV, FL ID card, or SSN, write "NONE".									
7. Last Name _____ Suffix (circle) _____ First Name _____ Middle Name/Initial _____									
8. Address Where You Live (Legal Residence) (not an alias) _____ City _____ County of Legal Residence _____ State _____ Zip Code _____									
9. Mailing Address (if different from above) _____ City _____ County _____ State _____ Zip Code _____									
10. Address Last Registered to Vote _____ City _____ County _____ State _____ Zip Code _____									
11. Former Name (if Making Name Change) _____ (Day Phone Number (optional) _____)									
12. Party Affiliation (Check only one) <input type="checkbox"/> Democratic Party <input type="checkbox"/> Republican Party <input type="checkbox"/> Minor party (pre-registered party name) _____ <input type="checkbox"/> NONE									
13. Race/Ethnicity (Check only one) <input type="checkbox"/> American Indian/Alaskan Native <input type="checkbox"/> Asian/Pacific Islander <input type="checkbox"/> Black, not Hispanic <input type="checkbox"/> Hispanic <input type="checkbox"/> White, not Hispanic									
14. Yes <input type="checkbox"/> No <input type="checkbox"/> (Do you need voting assistance at the polls?) Yes <input type="checkbox"/> No <input type="checkbox"/> (Are you interested in being a poll worker?) Yes <input type="checkbox"/> No <input type="checkbox"/> State or Country of Birth _____									
15. Are You: <input type="checkbox"/> Active Duty Military/Merchant Marine <input type="checkbox"/> Dependent of Active Duty Military/Merchant Marine <input type="checkbox"/> U.S. Citizen Currently Residing Outside the U.S.									
16. OATH: I do solemnly swear (or affirm) that I will protect and defend the Constitution of the United States and the Constitution of the State of Florida, that I am qualified to register as an elector under the Constitution and laws of the State of Florida, and that all information provided in this application is true.									
SIGNATURE: Sign or mark as line as box below. (Should without signature or mark of applicant)									
X _____ Date: _____									

# Provisional Ballots

**Pasco County  
EViD Operators**

**Depend Totally  
on the  
Phone Bank**

**for Provisional Ballot Authorization**



**Phone Bank  
Operators are  
required to  
complete  
paperwork  
anytime a  
provisional ballot  
is issued.**

## **For Starters:**

**I authorized a Provisional  
Ballot for .....**

**Precinct \_\_\_\_\_**

**Because:**

- ☐ **No ID**
- ☐ **Unable to verify reg**
- ☐ **Voter refutes phone  
bank findings**
- ☐ **Voter already voted**
- ☐ **Voter Challenged**
- ☐ **Other**

And they  
are also  
required to  
complete  
most of this  
form

GENERAL ELECTION  
NOVEMBER 6, 2012  
OUT OF COUNTY ADDRESS CHANGE FORM

Precinct # Calling \_\_\_\_\_

Phone Bank Operator Initials \_\_\_\_\_

*VOTER INFORMATION*

Voter's Registration Number \_\_\_\_\_

Voter's Party (Ballot Style) \_\_\_\_\_

Voter Last Name \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_

Voter Date of Birth \_\_\_\_\_

New Residence Address (cannot be a PO Box) \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Voter's New Precinct # \_\_\_\_\_

*Provisional Ballot ID #* \_\_\_\_\_



Permanent Staff Person \_\_\_\_\_

☐ Voter's Record Processed Into Pasco

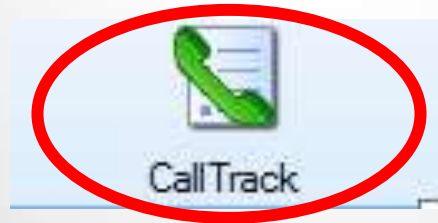
☐ Provisional Voting History Added



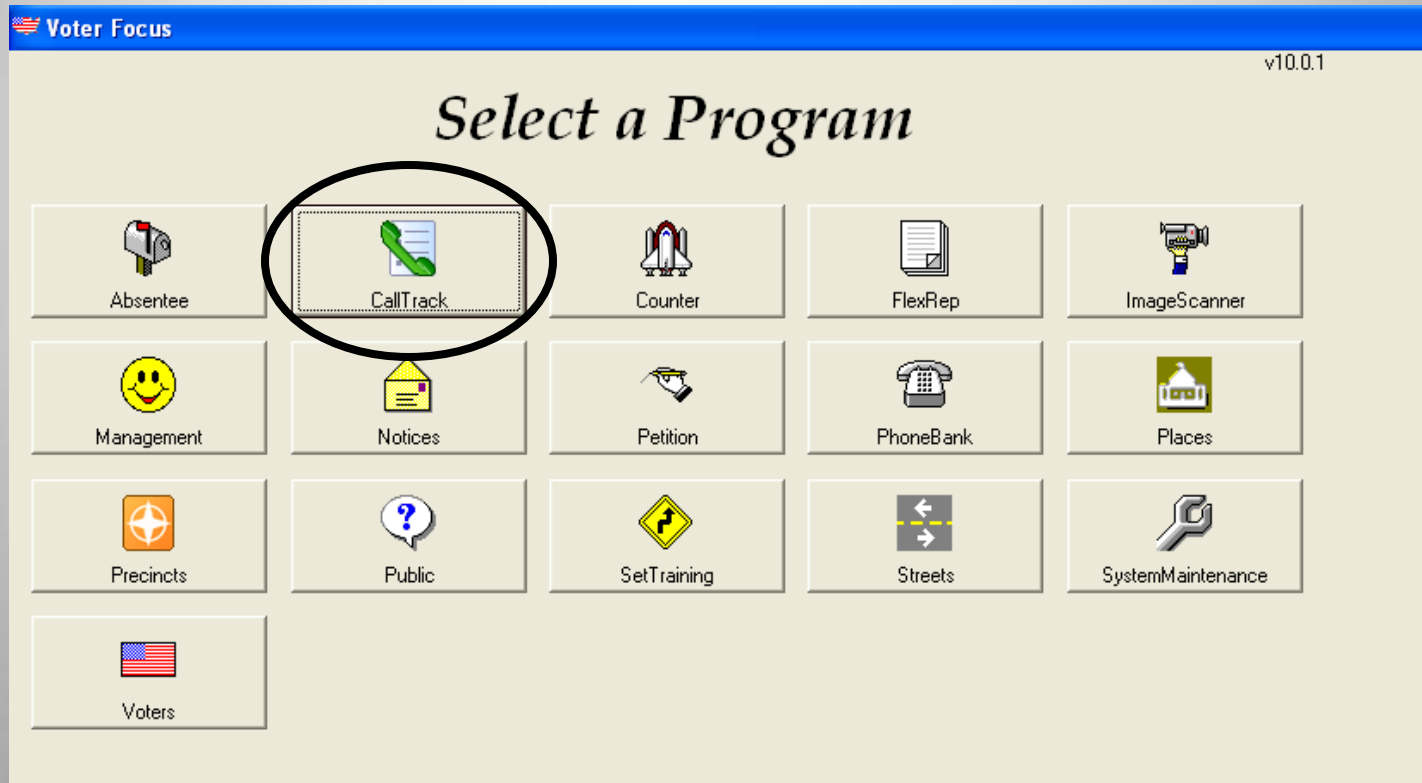
# FAQs From EViD Operators to the Phone Bank

1. I don't have a green light. ● Can I still work on my EViD? **YES**
2. I don't have a message in my mail box! *The EViD is not connecting with the server.* 
3. The signature pad is blank. *Adjust contrast wheel or reset sig pad on the EViD.* 
4. I'm changing an address and it won't come up. *Only type in the house# and a few letters of the street name.* **13718 Pal**

# Advantages of Using Call Track



# While the polls are opening you will work in the **CALL TRACK Module**



# This is what the screen looks like

Sandbox DB - CallTrack

File Maintenance Exports Help

Election: 2014 Municipal Election Place ID: 001

Place Name: First Baptist Church Dade City

Address: 37511 Church Ave, Dade City

Prior: Next

Select Place

Change Place Type

Show Status Summary

Delivery / Access Equipment Workers Contacts Calls

Delivery Location:

Delivery Hours:

Storage Location:

Special Info:

Delivery Date: 4/8/2014 Delivery Route/Sequence:

Pickup Date: 4/8/2014 Pickup Route/Sequence:

Notes: Pri 2010 Jim Sartain will turn off alarm

Driver Cell P:

Description	Needed	Avail
First Baptist Church Fellowship ...	0	0

Close

Outstanding Calls

Priority	Status	Category	Time	Rptd by	Place	Problem Description	Dept.	Call #
Urgent	Open	Other	15:53	IN	001	IN THE BUILDING	Moming	1
Urgent	Open	Other	15:53	READY	001	READY FOR VOTING	Moming	9

Show: ☒ Current Place ☐ All Places

Department:

☐ Incl Resolved

The first calls you will log are the  
“We’re in the building” calls.

**The Phone Will Blink**



**You answer “Phone Bank – this is Tami”**



**The Pollworker Says  
“This is Mary Ann, Precinct 102  
We’re in the building!”**



# Click on Select Place

Sandbox DB - CallTrack

File Maintenance Exports Help

Election  Place ID

Place Name  **Select Place**

Address  **Change Place Type**

Show Status Summary

Delivery / Access Equipment Workers Contacts Calls

Delivery Location

Delivery Hours

Storage Location

Special Info

Delivery Date

Pickup Date

Description

Notes

Pri 2010 Jim Sartain will turn off alarm

CITY PRECINCT  
TECO #01900124682

Field Rep E-2: Matt Lyman

Close

**Polling Place Selection**

**Click on Pct that is calling.**

005, Alice Hall Community Center

010, San Antonio City Hall

023, Knights of Columbus Hall

025, New Port Richey Recreation Center

050, Masonic Lodge F. & A.M. #146

060, Finnish-American Club

074, St. Leo Town Hall

OK

Cancel

Outstanding Calls

Priority	Status	Category
Urgent	Open	Other
Urgent	Open	Other

Dept.	Call #
Moming	1
Moming	9

Show

☒ Current Place

☐ All Places

Department

☐ Incl Resolved

# Now You See This

Sandbox DB - CallTrack

File Maintenance Exports Help

Election  Place ID

Place Name

Address

Delivery / Access Equipment Workers Contacts Calls

Delivery Location

Delivery Hours

Storage Location

Special Info

Delivery Date  Delivery Route/Sequence

Pickup Date  Pickup Route/Sequence

Notes

Pri 2010 Jim Sartain will turn off alarm

CITY PRECINCT  
TECO #01900124682

Field Rep E-2: Matt Lyman

jsartain@fbcdadecity.org

Driver Cell Phone

Description	Needed	Avail
First Baptist Church Fellowship ...	0	0

Outstanding Calls

Priority	Status	Category	Time	Rptd by	Place	Problem Desc
Urgent	Open	Other	15:53	IN	001	IN THE BUILD
Urgent	Open	Other	15:53	READY	001	READY FOR

Notice the open status of the "We're in the Building" call from this precinct. That means no one has logged this call yet! It's up to you.

# Click on This Line

## Outstanding Calls

Priority	Status	Category	Time	Rptd by	Place	Problem Description	Dept.	Call #
Urgent	Open	Other	12/05/2013	IN	074	IN THE BUILDING	Morning	8
Urgent	Open	Other	12/05/2013	READY	074	READY FOR VOTING	Morning	16

Show

☒ Current Place

☐ All Places

Department

☐ Incl Resolved



# Your Screen Now Looks Like This

Sandbox DB - CallTrack

File Maintenance Exports Help

Election  Place ID

Place Name

Address

Delivery / Access Equipment Workers Contacts **Calls**

Place   Creation Date  Election  Operator  Call #  Equipment Type

Reported By  Category  Priority  Department  Serial Number

Problem Description and Previous Comments

Problem Description:  **IN THE BUILDING**

Enter New Comment

Status

☒ Open

☐ Pending

☐ Resolved

Outstanding Calls

Priority	Status	Category	Time	Rptd by	Place	Problem Description	Dept.	Call #
Urgent	Open	Other	12/05/2013	IN	074	IN THE BUILDING	Morning	8
Urgent	Open	Other	12/05/2013	READY	074	READY FOR VOTING	Morning	16

Show

☒ Current Place

☐ All Places

Department

☐ Incl Resolved

# Click on the Resolved Button

Sandbox DB - CallTrack

File Maintenance Exports Help

Election: 2014 Municipal Election Place ID: 074

Place Name: St. Leo Town Hall

Address: 34544 State Road 52 St. Leo

Buttons: Prior, Next, Select Place, Change Place Type

Show Status Summary

Tabs: Delivery / Access, Equipment, Workers, Contacts, Calls

Place: 074 St. Leo Town Hall Creation Date: 12/05/2013 Election: 115 Operator: slaugh Call #: 8 Equipment Type: [v]

Reported By: IN Category: 42,Other Priority: URG, Urgent Department: MORN, Morning Serial Number: [v]

Problem Description and Previous Comments

Problem Description: slaugh Dec/05/2013 3:53:06 PM  
**IN THE BUILDING**

Status: ☒ Open ☐ Pending ☐ Resolved

Buttons: New Call, Save Changes, Close

Enter New Comment

Outstanding Calls

Priority	Status	Category	Time	Rptd by	Place	Problem Description	Dept.	Call #
Urgent	Open	Other	12/05/2013	IN	074	IN THE BUILDING	Morning	8
Urgent	Open	Other	12/05/2013	READY	074	READY FOR VOTING	Morning	16

Show: ☒ Current Place ☐ All Places

Department: [v]

☐ Incl Resolved

And Save Changes

# After “Saving Changes” the “In the Building Call” disappears from the list.

Sandbox DB - CallTrack

File Maintenance Exports Help

Election  Place ID

Place Name

Address

Delivery / Access Equipment Workers Contacts **Calls**

Place   Creation Date  Election  Operator  Call #  Equipment Type

Reported By  Category  Priority  Department  Serial Number

Problem Description and Previous Comments

Problem Description; slaugh Dec/05/2013 3:53:26 PM  
**READY FOR VOTING**

Enter New Comment

Status  
☒ Open  
☐ Pending  
☐ Resolved

Outstanding Calls

Priority	Status	Category	Time	Rptd by	Place	Problem Description	Dept.	Call #
Urgent	Open	Other	12/05/2013	READY	074	READY FOR VOTING	Morning	16

Show  
☒ Current Place  
☐ All Places  
Department   
☐ Incl Resolved

Once “In the Building” is resolved, you can log any additional problems the pollworker may be reporting by selecting New Call.

The screenshot shows the 'Sandbox DB - CalITrack' application window. The 'Calls' tab is selected, displaying a form for a new call. The form includes fields for Place ID (074), Place Name (St. Leo Town Hall), Address (34544 State Road 52, St. Leo), Creation Date (12/05/2013), Election (115), Operator (slaught), Call # (16), Equipment Type, Reported By (READY), Category (42.Other), Priority (URG. Urgent), Department (MORN. Morning), and Serial Number. A red arrow points to the 'New Call' button, which is circled in red. Below the form is a table of 'Outstanding Calls' with one entry: Urgent, Open, Other, 12/05/2013, READY, 074, READY FOR VOTING, Morning, 16. The 'Status' section has radio buttons for Open (selected), Pending, and Resolved. The 'Enter New Comment' section is empty. The 'Show' section has radio buttons for Current Place (selected) and All Places, a Department dropdown, and a checkbox for Incl Resolved.

File Maintenance Exports Help

Election 2014 Municipal Election Place ID 074 Place Name St. Leo Town Hall Address 34544 State Road 52, St. Leo

Show Status Summary

Delivery / Access Equipment Workers Contacts Calls

Place 074 St. Leo Town Hall Creation Date 12/05/2013 Election 115 Operator slaugh Call # 16 Equipment Type

Reported By READY Category 42.Other Priority URG. Urgent Department MORN. Morning Serial Number

Problem Description and Previous Comments

Problem Description: slaugh Dec/05/2013 3:53:26 PM  
READY FOR VOTING

Enter New Comment

Status  
☒ Open  
☐ Pending  
☐ Resolved

New Call

Save Changes Delete Call Close

Outstanding Calls

Priority	Status	Category	Time	Rptd by	Place	Problem Description	Dept.	Call #
Urgent	Open	Other	12/05/2013	READY	074	READY FOR VOTING	Morning	16

Show  
☒ Current Place  
☐ All Places  
Department  
  
☐ Incl Resolved

**If this precinct calls in again about a different problem, like equipment or supplies issues, you will not have to log that they are in the building again.**

**You will just log the equipment or supply issue.**



# After selecting the New Call Button The New Call Dialog Box Will Pop Up

The screenshot shows the 'Sandbox DB - CallTrack' application window. The main window has a menu bar with 'File', 'Maintenance', 'Exports', and 'Help'. Below the menu bar, there are fields for 'Election' (2014 Municipal Election), 'Place ID' (074), 'Place Name' (St. Leo Town Hall), and 'Place Type'. There are also buttons for 'Prior', 'Next', 'Select Place', and 'Show Status Summary'. A sidebar on the left shows a list of calls with columns for 'Delivery / A', 'Place', 'Reported By', 'Problem Description', and 'Priority'. The 'New Call' dialog box is open, showing fields for 'Place' (074, St. Leo Town Hall), 'Creation Date' (Dec/07/2013), 'Election' (2014 Municipal Election), and 'Operator' (tbentl). It also has dropdown menus for 'Reported By', 'Category', 'Priority', 'Department', 'Equipment Type', and 'Serial Number'. There is a text area for 'Problem Description' and a text area for 'Notes about Problem Resolution'. On the right side of the dialog box, there are radio buttons for 'Status' (Open, Pending, Resolved) and buttons for 'OK', 'Cancel', and 'Close'.

# Use the Drop Down Menus

**New Call Dialog**

Precinct: 043 Election Date: July 16/2010 Election: Primary Operator: [empty]

Reported By: Koons, Maguette E. Category: [01. EVID, 02. Supplies, 43. O.S.200, 44. Motronic, 41. Phones, 42. Other] Priority: [empty] Department: [empty]

Problem Description: [empty]

Notes about Problem Resolution: [empty]

Status: ☒ Open ☐ Pending ☐ Resolved

Buttons: OK, Cancel, New Call, Save Changes, Close

**Outstanding Calls**

PR	Status	Category	Time	Rptd by	Pct	Problem Description	Dept	Call#
Urgent	Open	Other	17.26	Koons, Maguette E	043	Ready for voting	Morning	18

**Show For:** ☒ Current Precinct ☐ All Precincts  
Department: [empty] ☐ Incl Resolved

# Select the Caller from the Drop-Down Menus

**New Call Dialog**

Precinct	Creation Date	Election	Operator
006 Alice Hall Community Center	Jul/27/2010	Primary (08/24/2010)	tbentl
Reported By	Category	Priority	Department
<div>Stokes, Lenora P</div> <div>Ferencz, Lillian O</div> <div>Harbeson, Rita E</div> <div>Smith, Ronald W</div> <div>Koontz, James E</div> <div>Bollinger, Steven C</div> <div>Bollinger, Diane M</div> <div>Knapp, Rosemarie A</div>	<div></div> <div>Serial Number</div> <div></div>	<div></div>	<div></div>

Notes about Problem Resolution



# Select a Category

**New Call Dialog**

Precinct	Creation Date	Election	Operator
006 Alice Hall Community Center	Jul/27/2010	Primary (08/24/2010)	tbentl
Reported By	Category	Priority	Department
Stokes, Lenora P			
Equipment Type			
Problem Description			
Notes about Problem Resolution			

The image shows a "New Call Dialog" form with several fields. A black circle highlights the "Category" dropdown menu, which is open and showing a list of options: 01, EViD; 02, Supplies; 43, DS200; 44, Ivotronic; 40, Pollworkers; 41, Phones; and 42, Other. The option "40, Pollworkers" is currently selected and highlighted in blue. The other fields in the form include "Precinct" (006 Alice Hall Community Center), "Creation Date" (Jul/27/2010), "Election" (Primary (08/24/2010)), "Operator" (tbentl), "Reported By" (Stokes, Lenora P), "Equipment Type", "Priority", "Department", "Problem Description", and "Notes about Problem Resolution".

# Select a Priority

**New Call Dialog**

Precinct	Creation Date	Election	Operator
006 Alice Hall Community Center	Jul/27/2010	Primary (08/24/2010)	tbentl
Reported By	Category	Priority	Department
Stokes, Lenora P	40, Pollworkers	URG, Urgent	
Equipment Type	Serial Number	VIMP, Very Important	
		IMP, Important	
		MED, Urgent	
		LOW, Urgent	

Problem Description

Notes about Problem Resolution

**Use only the first 3  
priority statuses!**

- URG
- VIMP
- IMP

# Select a Department

**New Call Dialog**

Precinct 006 Alice Hall Community Center	Creation Date Jul/27/2010	Election Primary (08/24/2010)	Operator tbentl
Reported By Stokes, Lenora P	Category 40, Pollworkers	Priority URG, Urgent	Department 
Equipment Type 	Serial Number 		

Problem Description

Notes about Problem Resolution

TECH = Tech Team (equipment)  
DISP = Jim (send out field reps)  
PW = Xenia (will call replacements)  
MGMT = Melba and Brian (phone issues)  
MORN = In the Bldg & Ready for Voting calls

# Enter a Problem Description

**New Call Dialog**

Precinct	Creation Date	Election	Operator
006 Alice Hall Community Center	Jul/27/2010	Primary (08/24/2010)	tbentl


Reported By	Category	Priority	Department
Stokes, Lenora P	40, Pollworkers	URG, Urgent	PW, Pollworkers

Equipment Type	Serial Number

Problem Description

The deputy for this precinct is sick and will not be able to work today.

Notes about Problem Resolution



Keep it brief, but give enough information that the problem can be resolved based on your description!

On election morning, the best way to communicate is electronically!

# Click "OK" and the Screen Will Look Like This

**Call Track** File Maintenance Help

Election: Primary (08/24/2010) Precinct/Location: 006  
Place Name: Alice Hall Community Center  
Address: 38116 5th Ave, Zephyrhills

Buttons: Prior, Next, Select Location, Change Locn Type, Show Status Report

Tabs: Delivery / Access, Equipment, Workers, Contacts, **Calls**

Precinct: 006 Alice Hall Community Center Creation Date: 11:30 Election: 106 Operator: tbentl Call#: 27 Equipment Type: [Dropdown]  
Reported By: Stokes, Lenora P Category: 40, Pollworkers Priority: URG, Urgent Department: PW, Pollworkers Serial Number: [Text Box]

Problem Description and Old Comments  
Problem Description; tbentl Jul/27/2010 11:30:12 AM  
**The deputy for this precinct is sick and will not be able to work today.**

Status:  
☒ Open  
☐ Pending  
☐ Resolved

Enter New Comment: [Text Box]

Buttons: New Call, Save Changes, Close

Outstanding Calls

PR	Status	Category	Time	Rptd by	Prc	Problem Description	Dept.	Call#	Show For:
Urgent	Open	Pollworkers	11:30	Stokes, Lenora P	006	The deputy for this precinct is sick and will not be...	P		

Notice that the call gets logged here and has a status of "open"

**If that precinct calls again, to report the same problem, you will NOT log that call again to prevent bombarding the tech team with duplicate calls of the same issue.**



After reminding you about the deputy issue from the other call, she mentions a new problem with the phone.



**New Call**

Place	003 Pasco-Hernando Community College	Creation Date	Aug/01/2012	Election	2012 Primary Election	Operator	tbentl
Reported By	Melton, Sandra J	Category	41, Phones	Priority	URG, Urgent	Department	MGMT, Management
Equipment Type		Serial Number					
Problem Description I am using my cell phone because the phone in my supplies is not working!							
Notes about Problem Resolution							

Status  
☒ Open  
☐ Pending  
☐ Resolved

OK  
Cancel

**Phone issues get assigned to Management**

# This is one you may be able to troubleshoot

**New Call Dialog**

Precinct	Creation Date	Election	Operator
006 Alice Hall Community Center	Jul/27/2010	Primary (08/24/2010)	tbentl
Reported By	Category	Priority	Department
Stokes, Lenora P	41, Phones	VIMP, Very Important	TECH, Technical
Equipment Type	Serial Number		
Problem Description			
I am using my cell phone because the phone in our supplies is not working!			
Notes about Problem Resolution			
Is the ringer turned on?			

Ask something like ...

Enter notes about the problem



# If your suggestion works, select Resolved and Save Changes!

**New Call Dialog**

Precinct	Creation Date	Election	Operator
006 Alice Hall Community Center	Jul/27/2010	Primary (08/24/2010)	tbentl
Reported By	Category	Priority	Department
Stokes, Lenora P	41, Phones	VIMP, Very Important	TECH, Technical
Equipment Type	Serial Number		
Problem Description			
I am using my cell phone because the phone in our supplies is not working.			
Notes about Problem Resolution			
Is the ringer turned on?			

Status

- ☐ Open
- ☐ Pending
- ☒ Resolved

Save Changes

Oops!

Pct 6  
Rocks!



# You may be able to troubleshoot this one too!

**Call Track**

File Maintenance Help

Election  Precinct/Location

**New Call Dialog**

Precinct	Creation Date	Election	Operator
042 Holiday Recreation Complex	Jul/27/2010	Primary (08/24/2010)	tbentl

Reported By	Category	Priority	Department
Farrell, Robert E	02, Supplies	IMP, Important	DISP, Dispatch

Equipment Type  Serial Number

**Problem Description**  
We can't find the pollworker payroll envelope.

**Notes about Problem Resolution**  
It's in the Green Bag!

Can't find the pollworker payroll envelope?

It's in the Green Bag!

OK Cancel

Close

Show For:  
☒ Curr Precinct  
☐ All Precincts  
☐ All Resolved

You will know this because you will be given a Polling Place Supply List – Let's review supply lists!

# Click OK

**New Call Dialog**

Precinct: 042 Holiday Recreation Complex    Creation Date: Jul/27/2010    Election: Primary (08/24/2010)    Operator: tbentl

Reported By: Farrell, Robert E    Category: 02, Supplies    Priority: IMP, Important    Department: DISP, Dispatch

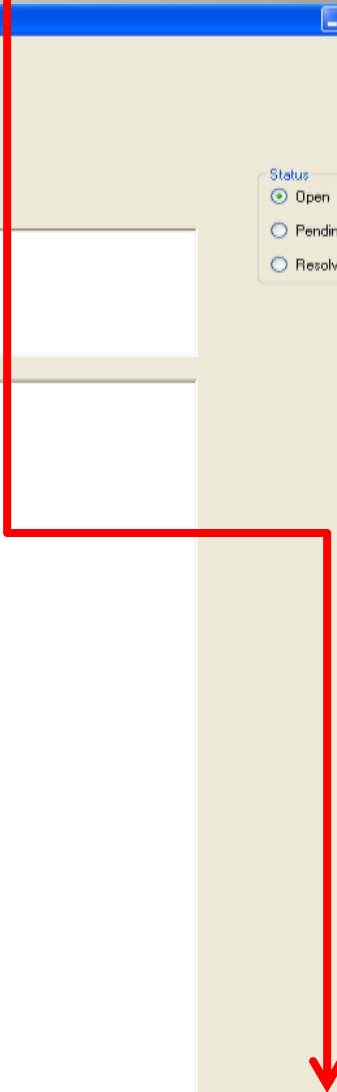
Equipment Type:    Serial Number:

Problem Description  
We can't find the pollworker payroll envelope.

Notes about Problem Resolution  
It's in the Green Bag!

Status:  
☒ Open  
☐ Pending  
☐ Resolved

OK  
Cancel



# Click Resolved and We're Done

The screenshot shows the 'Call Track' application window. At the top, there's a menu bar with 'File', 'Maintenance', and 'Help'. Below it, a form for call tracking is visible. The 'Election' field is set to 'Primary (08/24/2010)' and 'Precinct/Location' is '042'. The 'Place Name' is 'Holiday Recreation Complex' and the 'Address' is '2830 Gulf Trace Blvd, Holiday'. A 'Show Status Report' button is present. The 'Calls' tab is selected, showing details for a call created on '15:48' by operator 'tberil' with call number '1'. The 'Category' is '02:Supplies' and 'Priority' is 'IMP, Important'. The 'Department' is 'DISP, Dispatch'. The 'Problem Description and Old Comments' section contains the text: 'Problem Description: tberil Jul/27/2010 4:48:52 PM We can't find the pollworker payroll envelope. Comment: tberil 7/27/2010 4:48:52 PM It's in the Green Bag!'. Below this is a text area for 'Enter New Comment'. On the right side, there's a 'Status' section with three radio buttons: 'Open', 'Pending', and 'Resolved'. A red arrow points to the 'Resolved' button. Below the status buttons are 'New Call' and 'Save Changes' buttons. At the bottom, there's a table titled 'Outstanding Calls' with columns: 'PR', 'Status', 'Category', 'Time', 'Rptd by', 'Pct', 'Problem Description', 'Dept', and 'Call#'. The table contains one row: 'Important', 'Open', 'Supplies', '15:48', 'Farnell, Robert E', '042', 'We can't find the pollworker payroll envelope', 'Dispatch', '1'. To the right of the table is a 'Show For' section with radio buttons for 'Curr Precinct' (selected), 'All Precincts', and 'Ind Resolved', and a 'Department' dropdown menu.

Call Track

File Maintenance Help

Election: Primary (08/24/2010) Precinct/Location: 042

Show Status Report Place Name: Holiday Recreation Complex

Address: 2830 Gulf Trace Blvd, Holiday

Delivery / Access Equipment Workers Contacts Calls

Precinct: 042 Holiday Recreation Complex Creation Date: 15:48 Election: 106 Operator: tberil Call#: 1 Equipment Type: [Dropdown]

Reported By: Farnell, Robert E Category: 02:Supplies Priority: IMP, Important Department: DISP, Dispatch Serial Number: [Text]

Problem Description and Old Comments:

Problem Description: tberil Jul/27/2010 4:48:52 PM  
We can't find the pollworker payroll envelope.  
Comment: tberil 7/27/2010 4:48:52 PM  
It's in the Green Bag!

Enter New Comment

Status:

☐ Open

☐ Pending

☒ Resolved

New Call

Save Changes

Close

Outstanding Calls

PR	Status	Category	Time	Rptd by	Pct	Problem Description	Dept	Call#
Important	Open	Supplies	15:48	Farnell, Robert E	042	We can't find the pollworker payroll envelope.	Dispatch	1

Show For:

☒ Curr Precinct

☐ All Precincts

Department: [Dropdown]

☐ Ind Resolved

# How Do I Know If A Call Has Already Been Logged?

On the bottom of the screen is a list of Outstanding Calls.

Outstanding Calls

Priority	Status	Category	Time	Rptd by	Place	Problem Description	Dept.	Call #
Urgent	Open	Other	11:3	IN	001	IN THE BUILDING	Morning	1
Urgent	Open	Other	11:3	IN	002	IN THE BUILDING	Morning	2
Urgent	Open	Other	11:3	IN	003	IN THE BUILDING	Morning	3
Urgent	Open	Other	11:3	IN	004	IN THE BUILDING	Morning	4
Urgent	Open	Other	11:3	IN	005	IN THE BUILDING	Morning	5
Urgent	Open	Other	11:3	IN	006	IN THE BUILDING	Morning	6
Urgent	Open	Other	11:3	IN	007	IN THE BUILDING	Morning	7

Show

☐ Current Place

☒ All Places

Department

☐ Incl Resolved

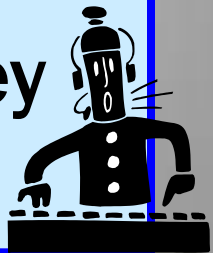
By using the “Show” box in the lower right-hand corner you can sort the calls by:

1. Current Place – meaning the location you have specified
2. All Places – meaning all polling places
3. By Department
4. Incl Resolved gives you the option of viewing problems that have already been resolved

**Before logging calls it is important for you to ascertain the situation. ALWAYS check to see if the “in the building” call is resolved.**

**We don't want to bombard the tech team, pollworker coordinator, and management with repeat messages.**

**Sometimes issues don't get resolved as quickly as pollworkers would like and they call again to report the same issue 😊**



# Precinct Supervisors are required to call twice ....

- Once to report that they are in the building
- And once again when they are set up and ready for voting.



**You will log the “Ready for voting” calls the same way you logged the “In the building” calls**

# Permanent Staff is Monitoring This Window

IN  42, Other  URG, Urgent  MORNING, Morning

Problem Description and Previous Comments

Problem Description; slaugh Dec/05/2013 3:53:06 PM  
**IN THE BUILDING**

Enter New Comment

Status  
☒ Open  
☐ Pending  
☐ Resolved

New Call

Save Changes

Delete Call

Close

## Outstanding Calls

Priority	Status	Category	Time	Rptd by	Place	Problem Description	Dept.	C
Urgent	Open	Pollworkers	13:49	Precinct Supervisor	060	Ballot Distributor is not here yet. It is 6:10 a.m.	Pollworkers	1..
Low	Open	Supplies	13:48	Precinct Supervisor	074	Can't find the pollworker payroll sheet.	Pollworkers	1..
Urgent	Open	Pollworkers	13:54	Precinct Supervisor	006	EVID operator has not shown up it is 6:15 a.m.	Pollworkers	2..
Urgent	Open	Other	12/05/2013	IN	023	IN THE BUILDING	Morning	4
Urgent	Open	Other	12/05/2013	IN	025	IN THE BUILDING	Morning	5
Urgent	Open	Other	12/05/2013	IN	050	IN THE BUILDING	Morning	6
Urgent	Open	Other	12/05/2013	IN	060	IN THE BUILDING	Morning	7

Show  
☐ Current Place  
☒ All Places  
Department  
  
☐ Incl Resolved



# Pollworker Coordinators Look at it This Way

☐ Resolved

Enter New Comment

New Call

Save Changes

Delete Call

Close

## Outstanding Calls

Priority	Status	Category	Time	Rptd by	Place	Problem Description	Dept.	Call #
Urgent	Open	Pollworkers	13:54	Precinct Supervisor	006	EVID operator has not shown up it is 6:15 a.m.	Pollworkers	20
Low	Open	Supplies	13:48	Precinct Supervisor	074	Can't find the pollworker payroll sheet.	Pollworkers	17
Urgent	Open	Pollworkers	13:49	Precinct Supervisor	060	Ballot Distributor is not here yet. It is 6:10 a.m.	Pollworkers	18

Show

☐ Current Place

☒ All Places

Department

PW, Pollworkers

☐ Incl Resolved

# Mr. Corley Looks at it This Way

Enter New Comment

☐ Pending

☐ Resolved

New Call

Save Changes

Delete Call

Close

Outstanding Calls

Priority	Status	Category	Time	Rptd by	Place	Problem Description	Dept.	Call #
Urgent	Open	Other	12/05/2013	IN	001	IN THE BUILDING	Morning	1
Urgent	Open	Other	12/05/2013	IN	023	IN THE BUILDING	Morning	4
Urgent	Open	Other	12/05/2013	IN	025	IN THE BUILDING	Morning	5
Urgent	Open	Other	12/05/2013	IN	050	IN THE BUILDING	Morning	6
Urgent	Open	Other	12/05/2013	IN	060	IN THE BUILDING	Morning	7
Urgent	Open	Other	12/05/2013	READY	001	READY FOR VOTING	Morning	9
Urgent	Open	Other	12/05/2013	READY	006	READY FOR VOTING	Morning	10

Show

☐ Current Place

☒ All Places

Department

MORN, Morning

☐ Incl Resolved

# Why All the Fuss About Logging Calls?

- That first hour is critical to the success of the elections.
- Communication between the pcts, phone bank and tech team need to be as efficient as possible in order to resolve things quickly and be ready for voting at 7:00 a.m.
- We are charged with the responsibility of opening the polls on time and must be accountable.



# **Call Track Problems to Log in at Training**

- 1. EViD operator didn't show**
- 2. Phone is not working**
- 3. No spare paper rolls for the EViD**
- 4. Can't find the poll worker payroll**
- 5. My extension cord isn't long enough**
- 6. I need a longer phone cord**
- 7. The door to the kitchen is locked**
- 8. The water in the bathroom isn't working**
- 9. Pollworker forgot to take her medicine, she needs to go home**
- 10. The air is not working in the polling place**

# **Best Practices Workshop**

## **Thanks For Coming!**



**Happy Holidays from Pasco County!**