# QUALIFIED VOTER FILE

# Basic User Training

REVISED DECEMBER 2020

# Training Agenda

## Introduction

- Security Requirements

## Segment 1

- Voter Search

## Segment 2

- Absentee Voting

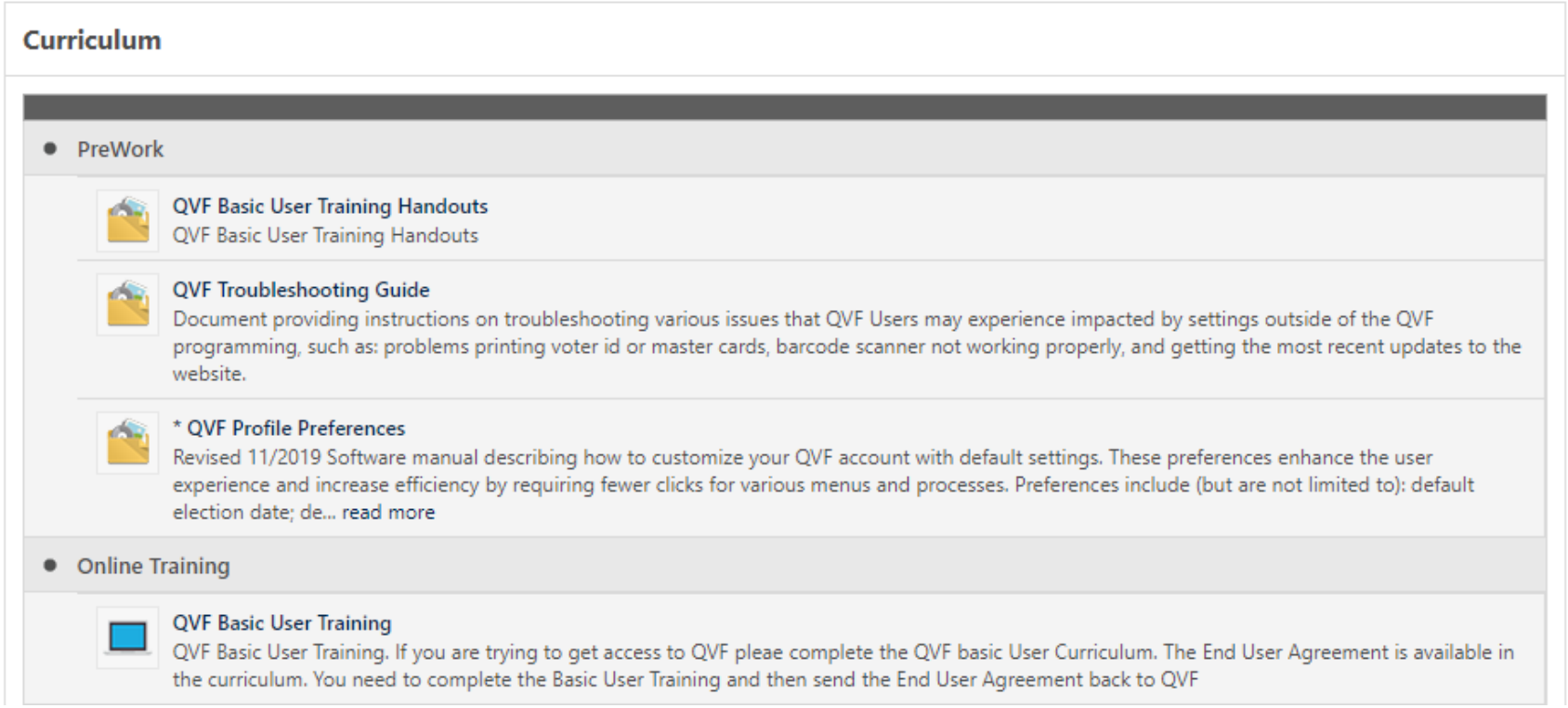
## Segment 3

- Election Tasks &Timeline

## Conclusion

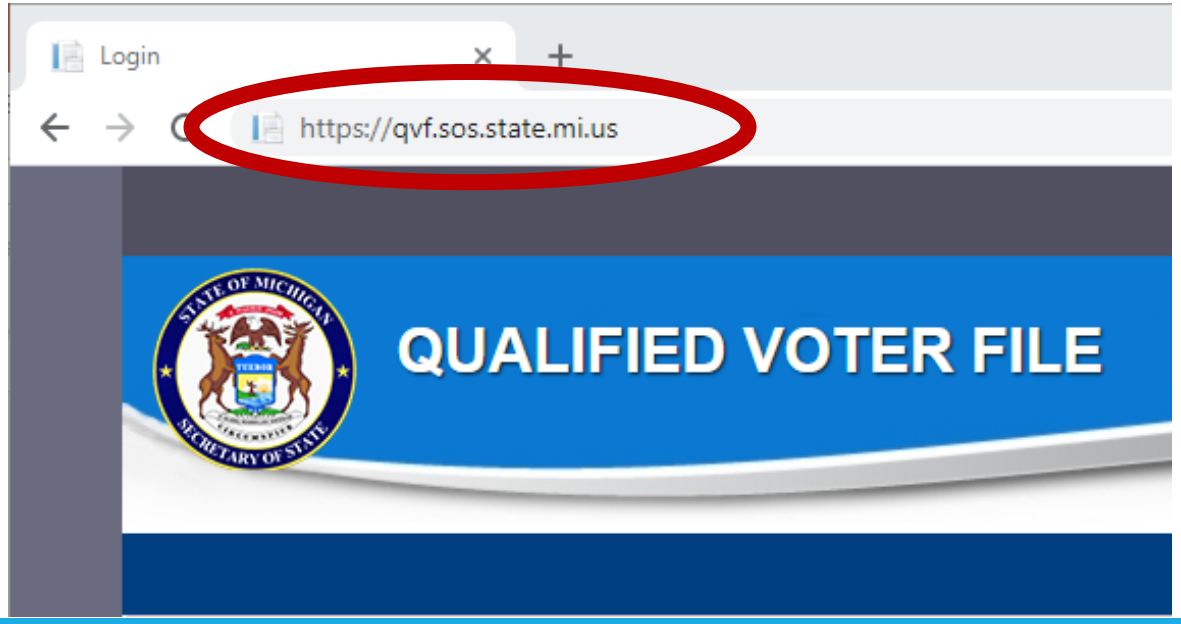
- Next Steps

# Course Requirements: QVF Basic User Curriculum



# How do I access QVF?

Windows 10



# How does a new user get their own QVF account?

**eLearning**

Request an eLearning account

Use link on eLearning login page

**QVF Training**

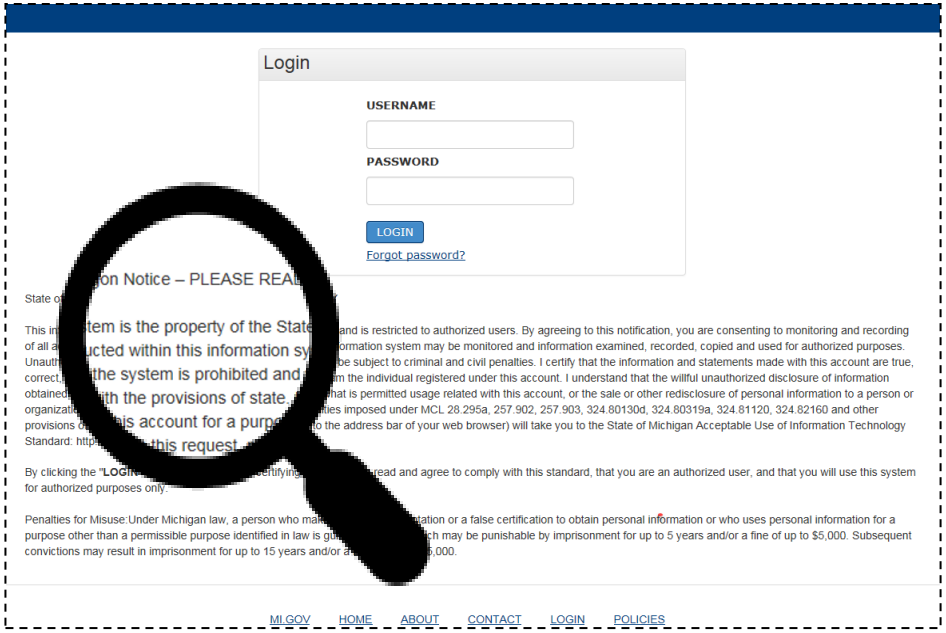
Each Basic User: Basic User Curriculum

Each Complete User: QVF Complete*

**While in-person QVF training is unavailable, take **QVF Basic to Complete** after this Basic curriculum for Complete QVF access.*

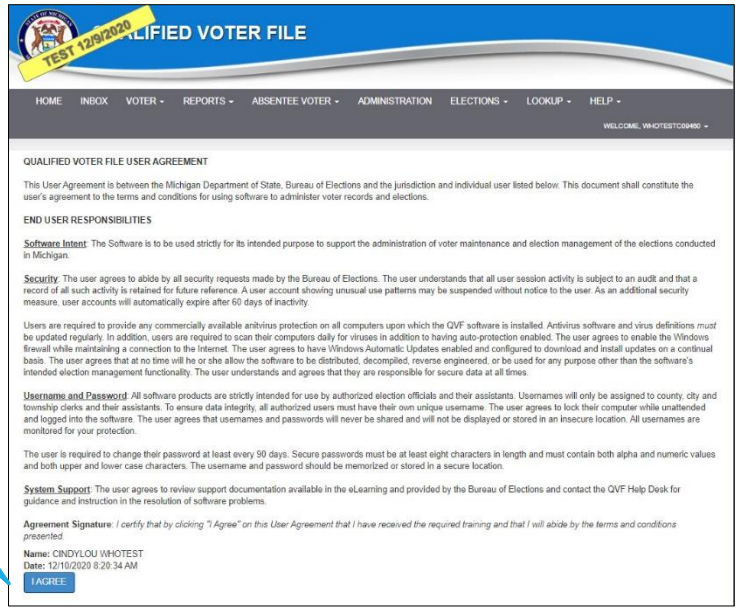
# Account Security

- Certify that you are the individual registered under this account
- Change your password regularly and never share or save it

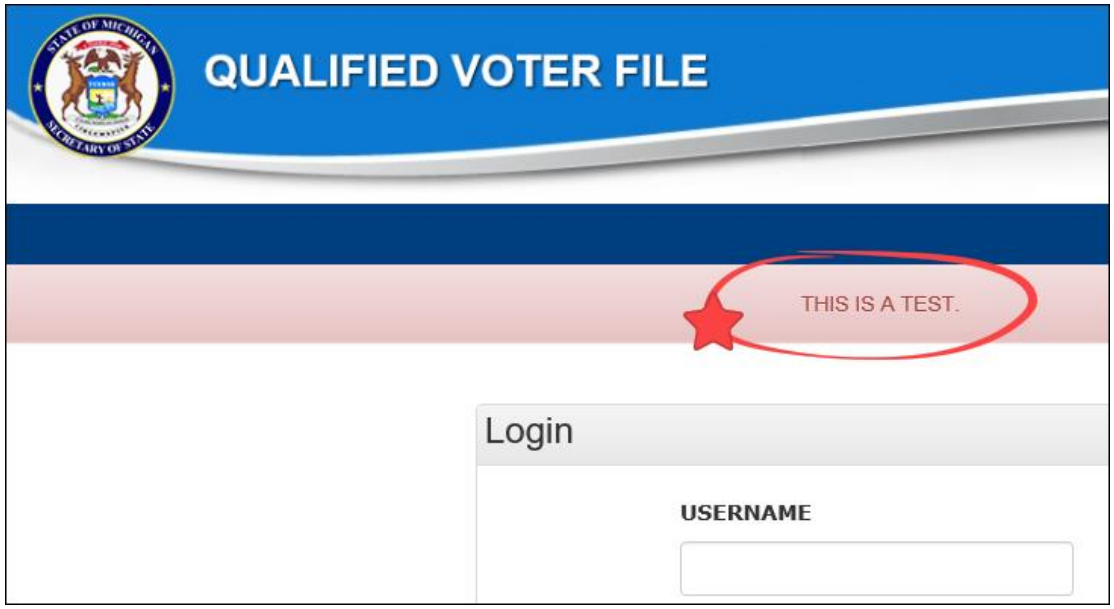


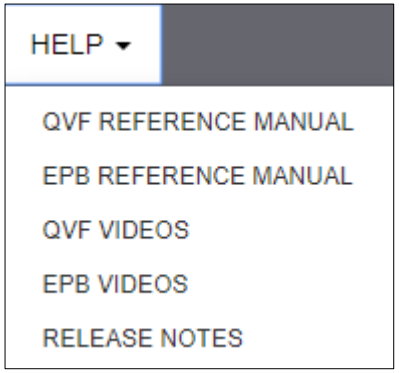
# Log into QVF for the first time

- ❑You will be emailed a QVF username
- ❑You will be emailed (separately) a link to change your password.
- ❑Change your password and never share or save it
- ❑Carefully read and accept the user agreement.
- ❑See your local user admin for more information on Multifactor Authentication (MFA)

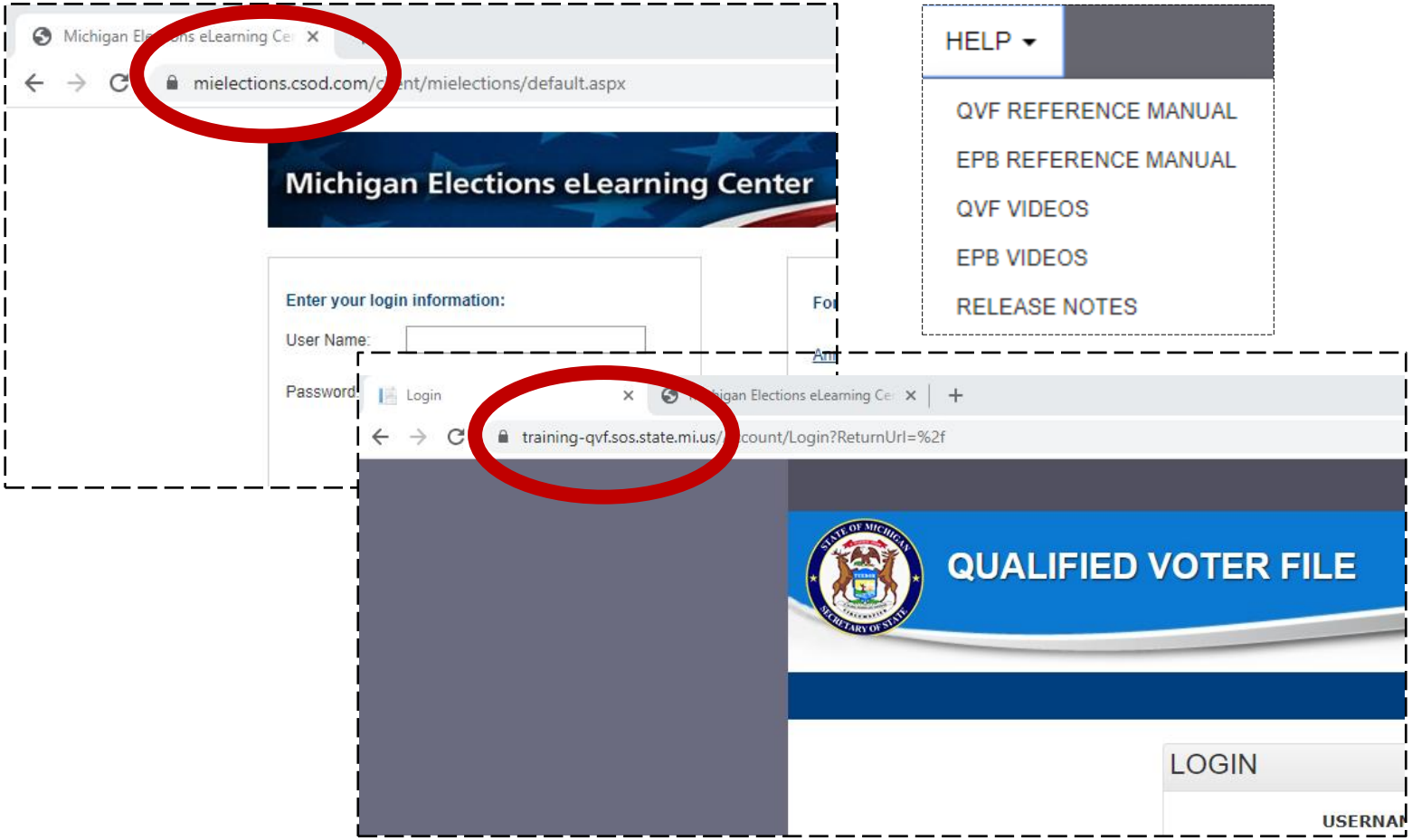


# New Features



# Electronic Resources



# Troubleshooting Guide

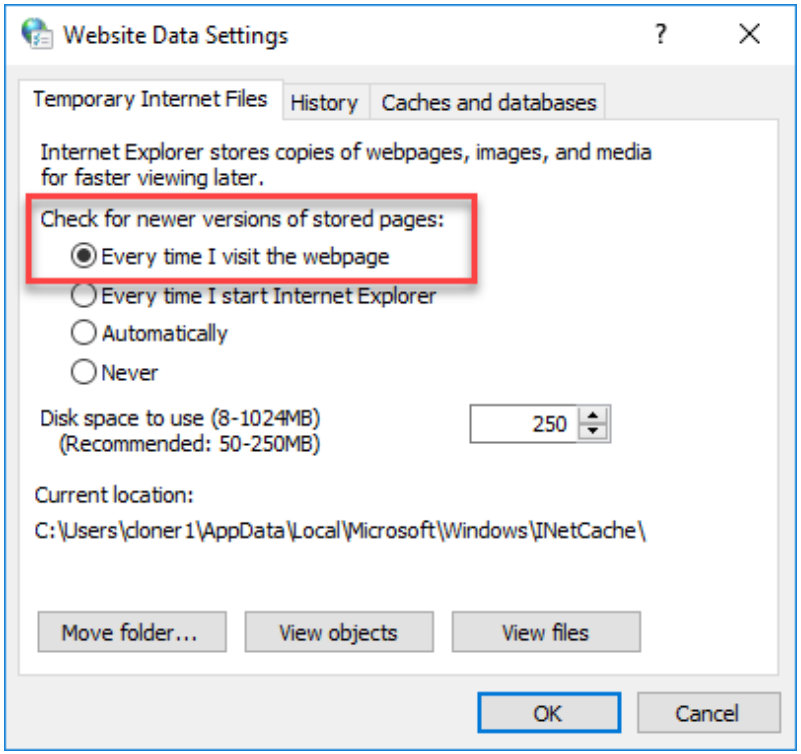
## Web browser settings

- ✓Disable Pop-up Blocker
- ✓Computer display settings
- ✓PDF settings
- ✓Printing settings
- ✓Barcode scanner configuration

IE 11 requires further settings changes

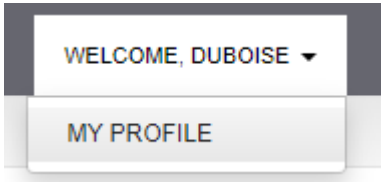
- ✓ Turn off IE Compatibility Mode
- ✓ Check Browser Version (IE 11, not IE 10)
- ✓ Turn off IE cache
- ✓ Add to IE's Trusted sites

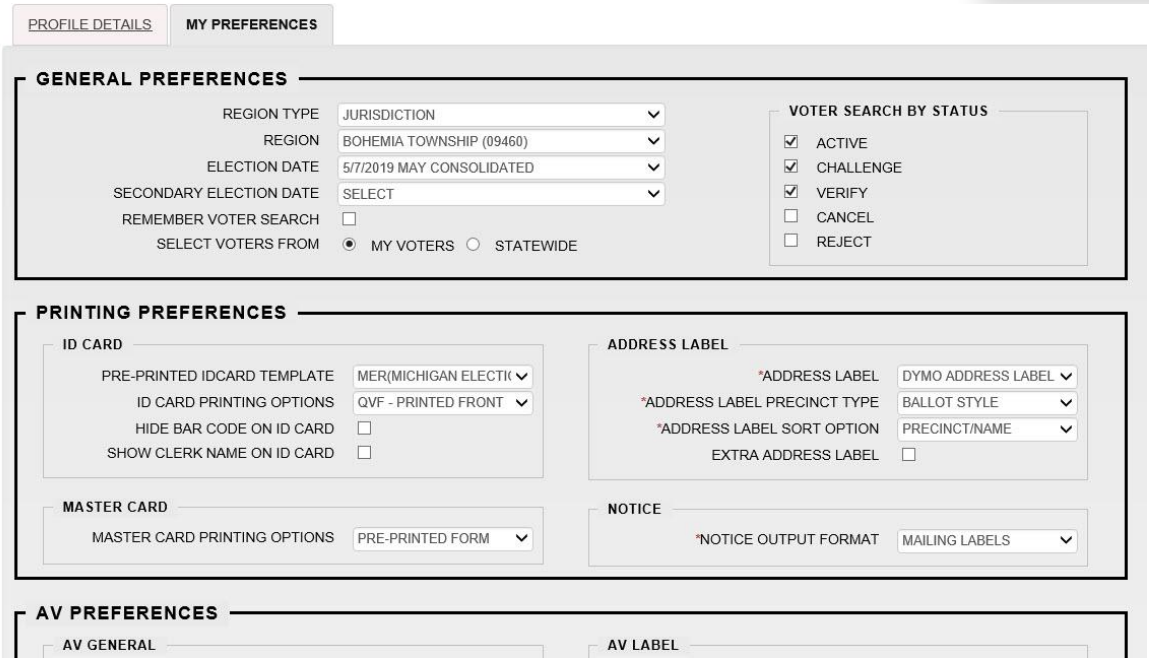
**Document available in eLearning Center or QVF Help menu**



# QVF Preferences

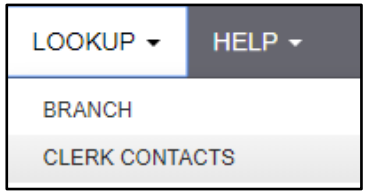
- Set default options at first log in
- Adjusting Preferences is important and greatly beneficial because saving selections streamlines your workflows
- Get the dates, labels, formats, and other options you want
- Do more work with fewer clicks!

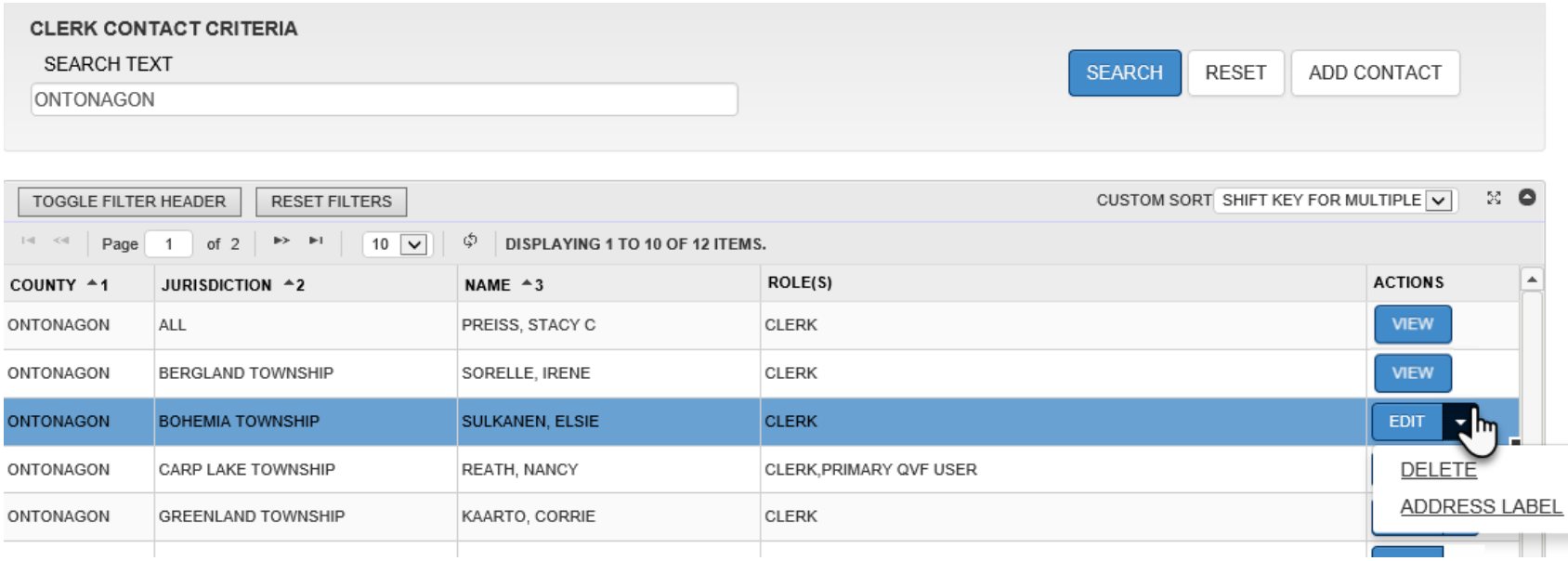


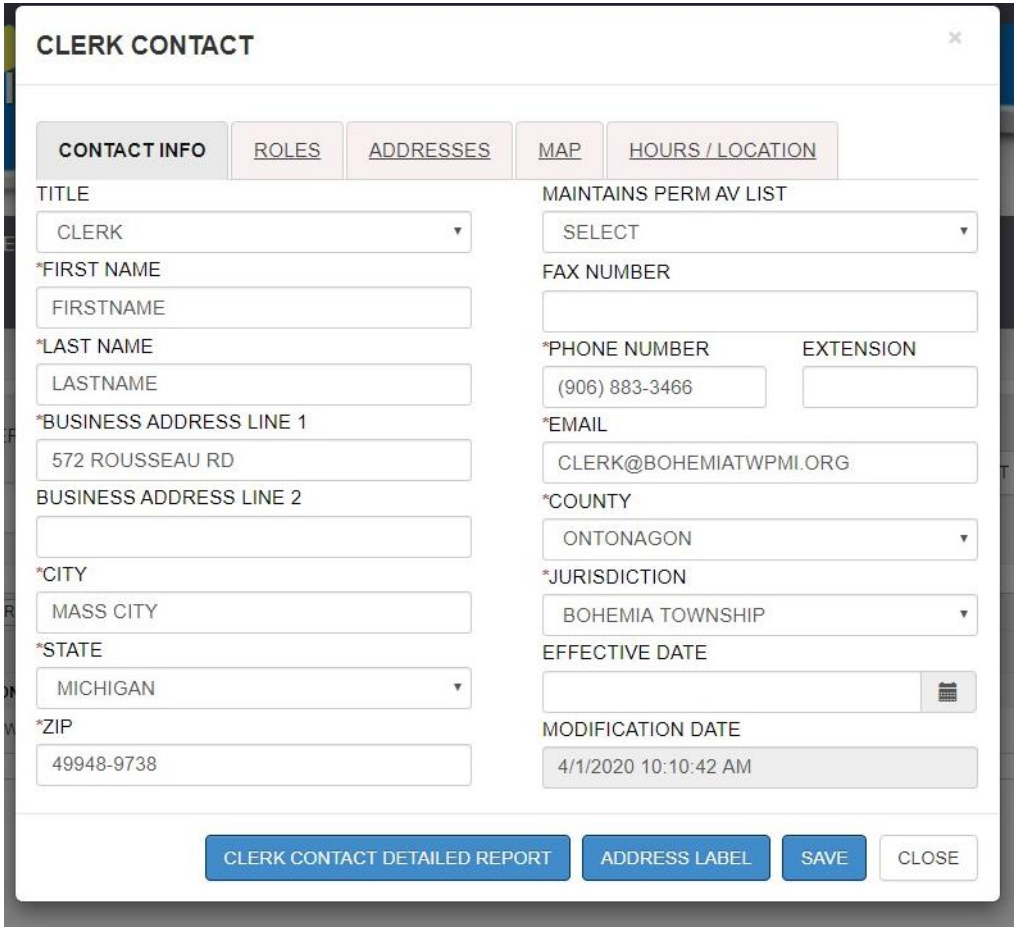
# Clerk Contacts

- Informs Voter ID Cards & MVIC/OVR sites
- Edit existing contact info
- Delete former staff in Edit button menu
- Add new staff with Add Contact (clerk required; others optional)

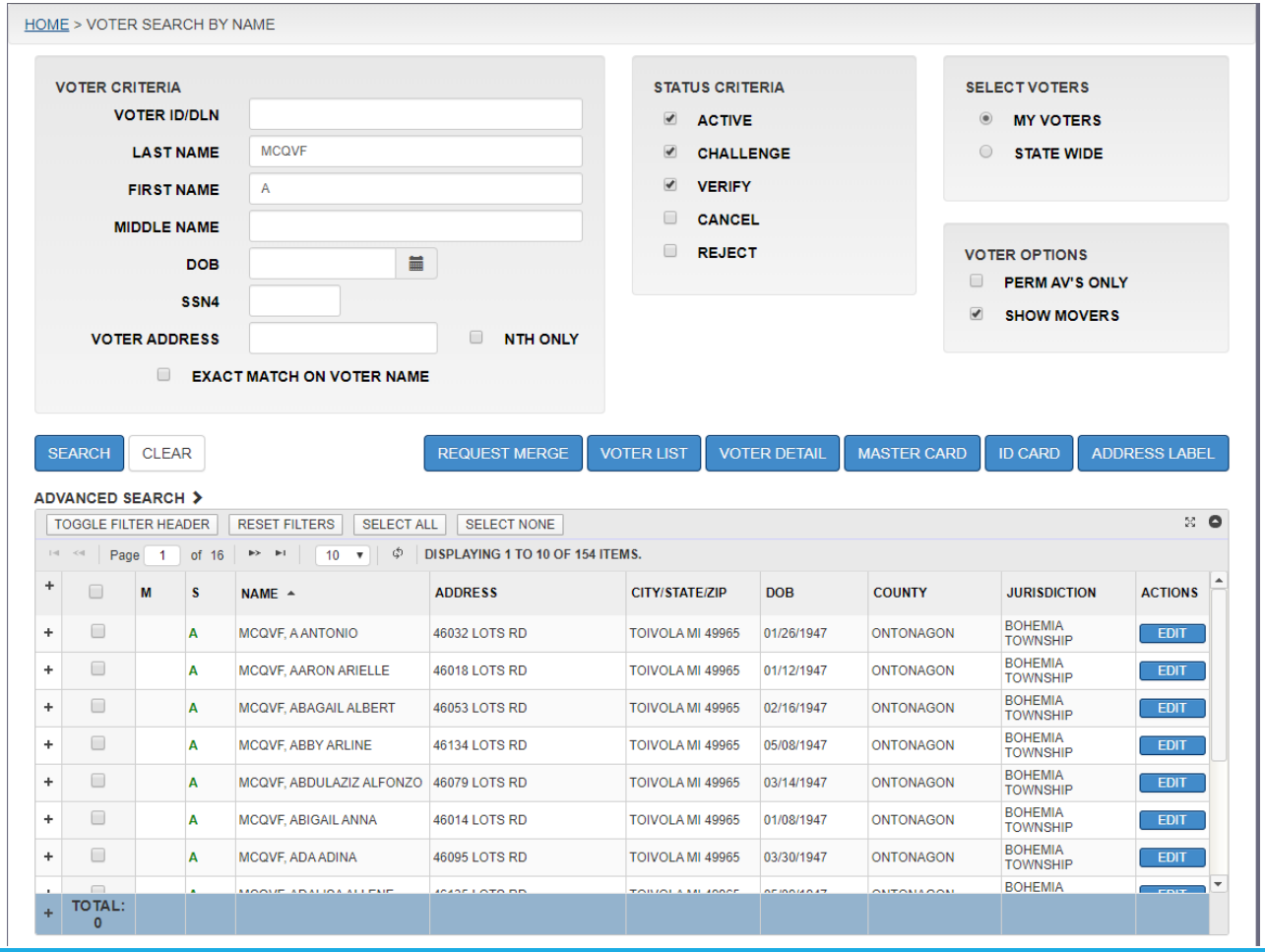


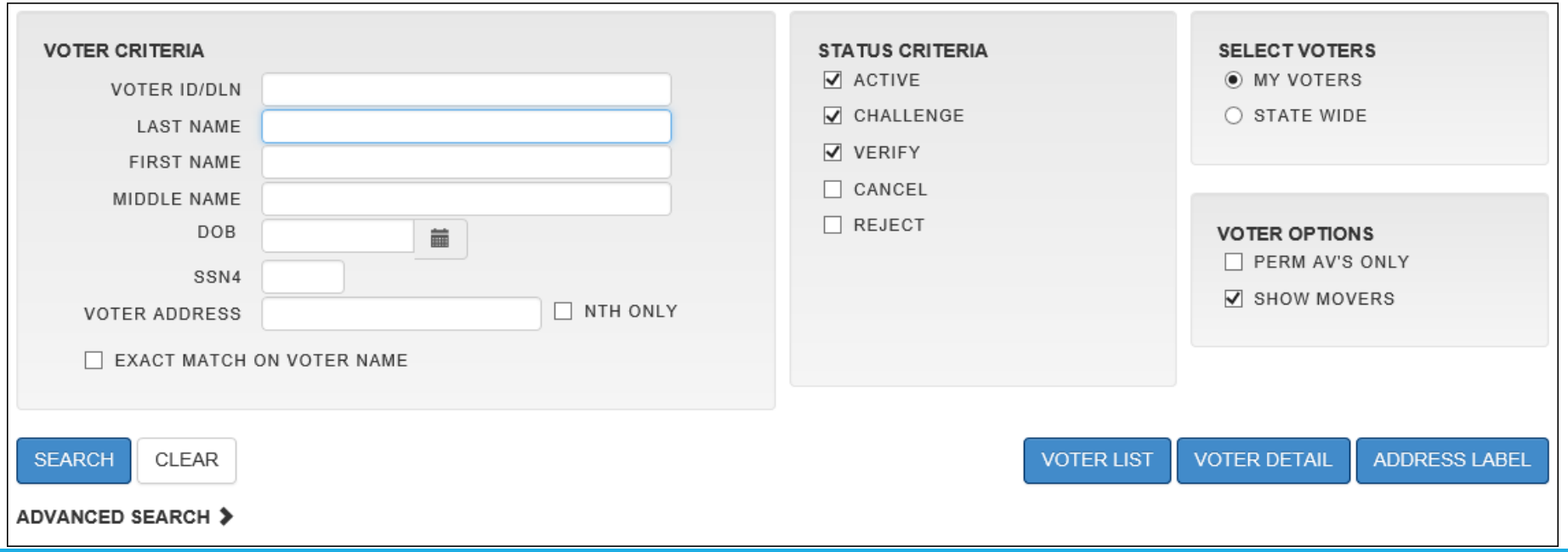
# Adding/Updating Contacts



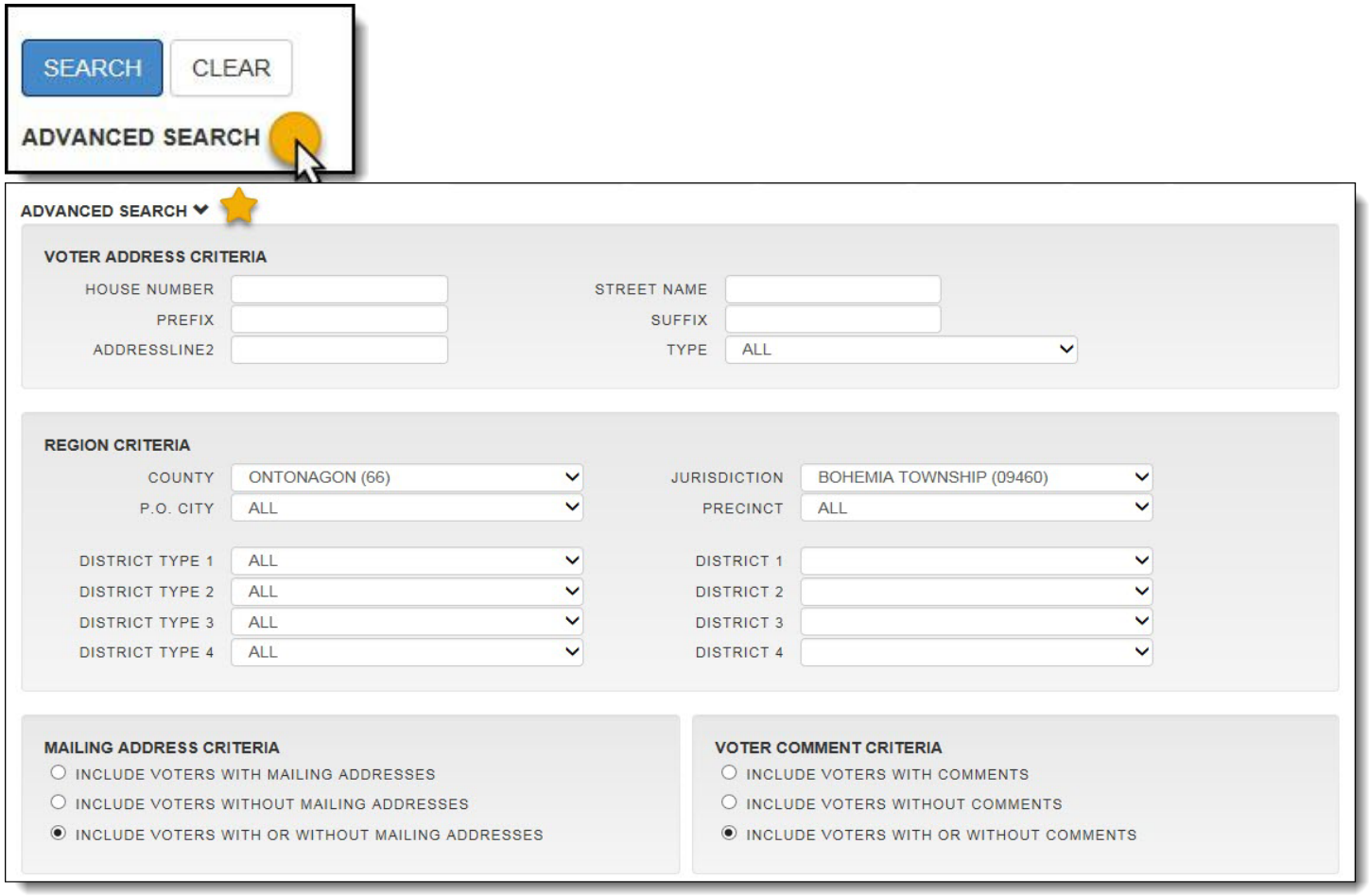
# Segment 1: Voter Search
# Voter Search Results



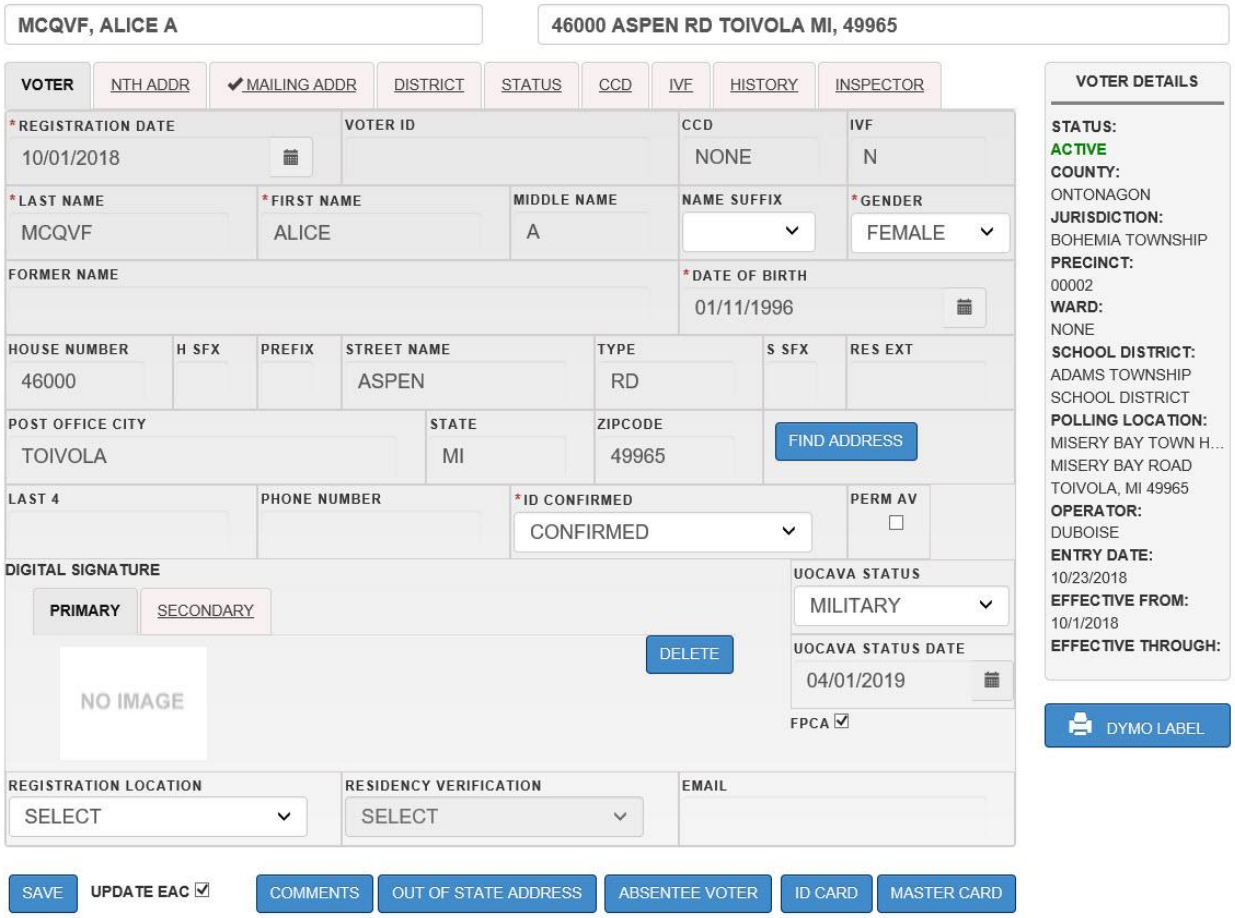
# QVF Voter Search



# Advanced Voter Search



# Anatomy of a Voter Record

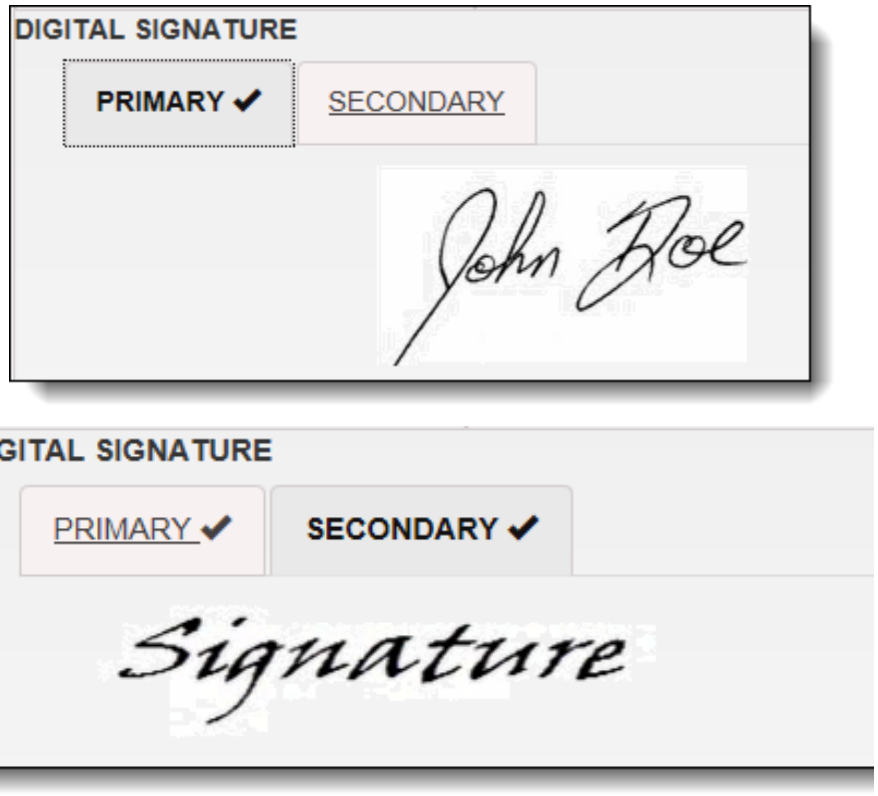


# History Tab

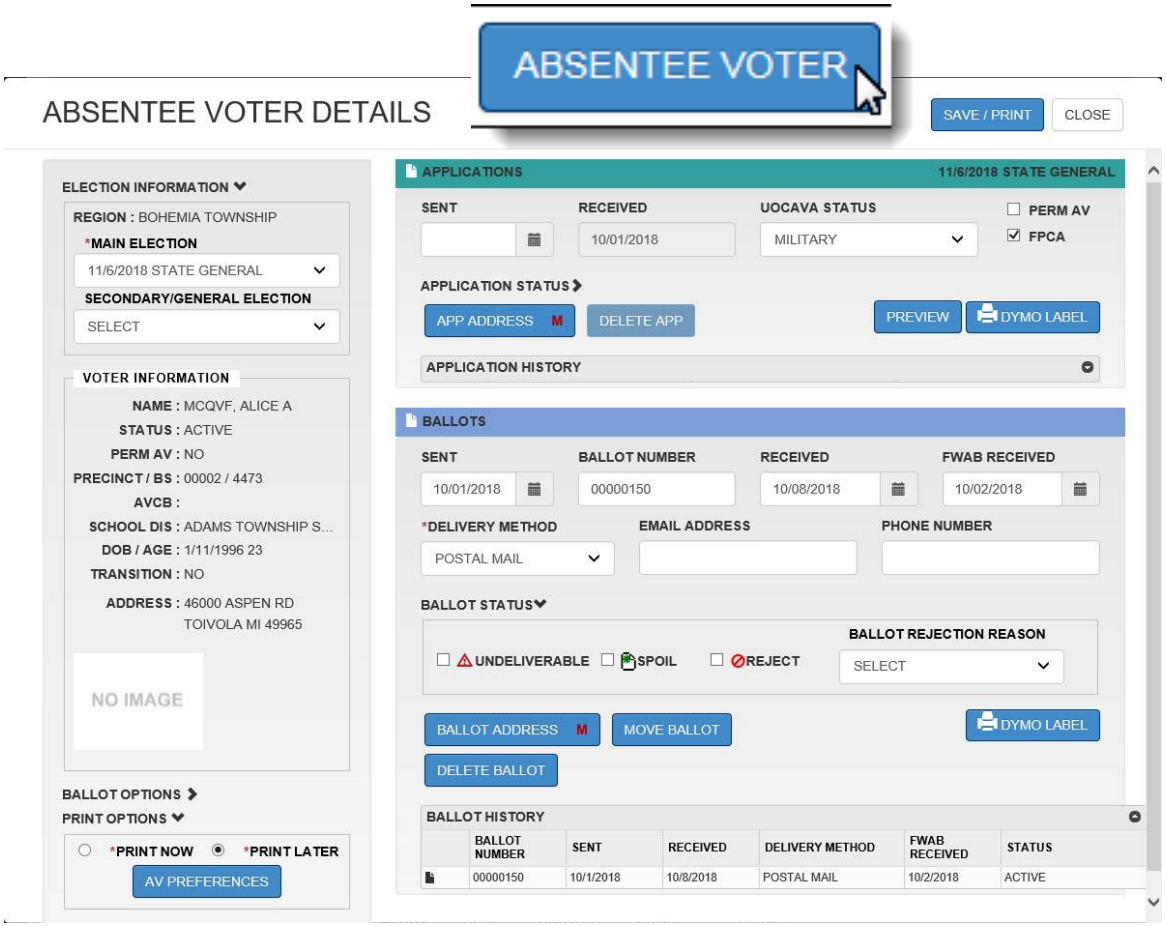
## Change History

## Voting History

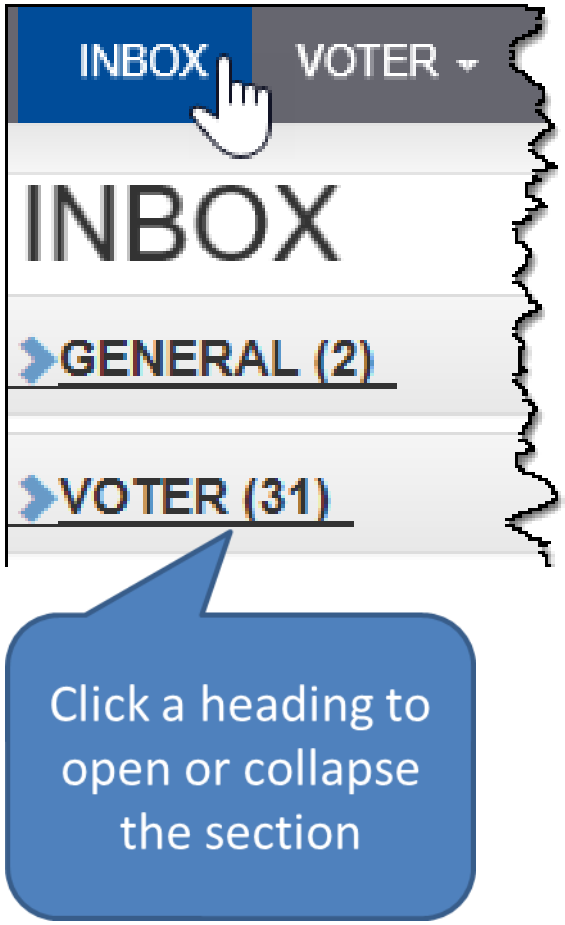
# Digitized Signature



# AV Tracking Shortcut

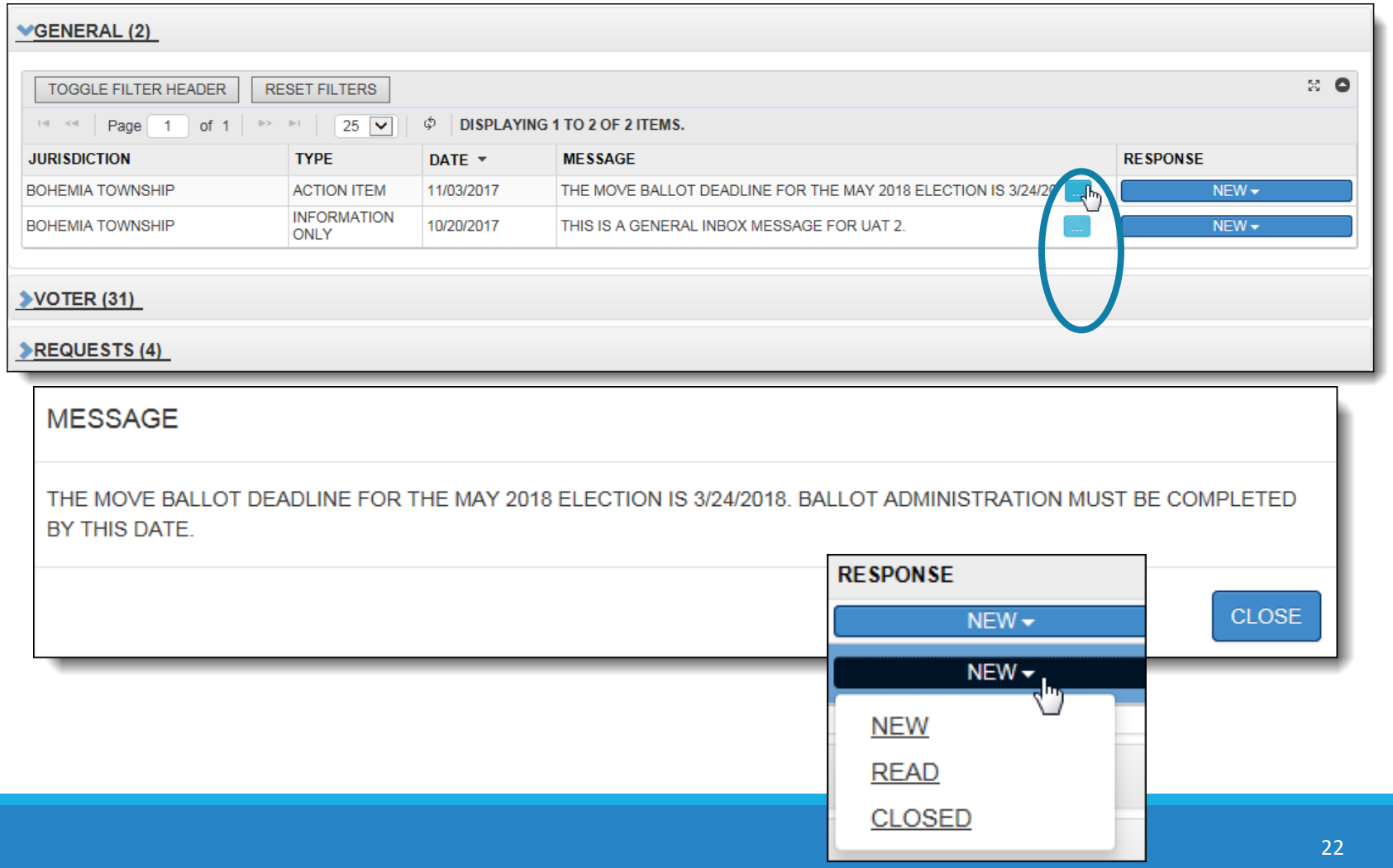


# Inbox Notifications




- General Communications, such as reminders and deadlines
- Voter registration changes

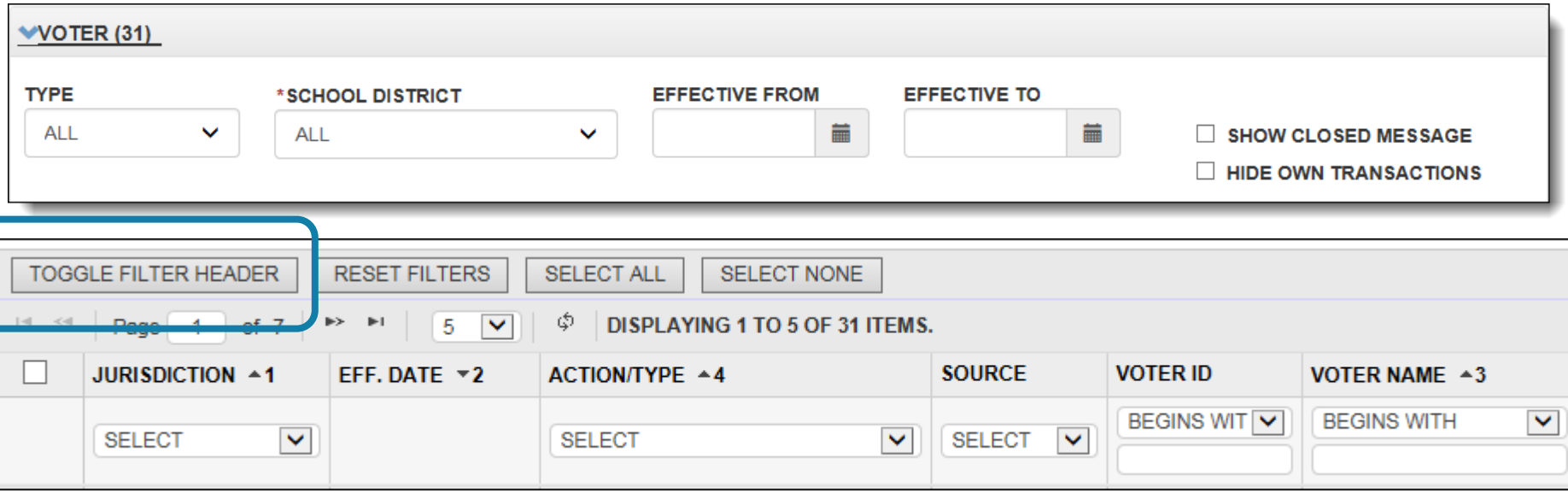
# General Inbox Messages



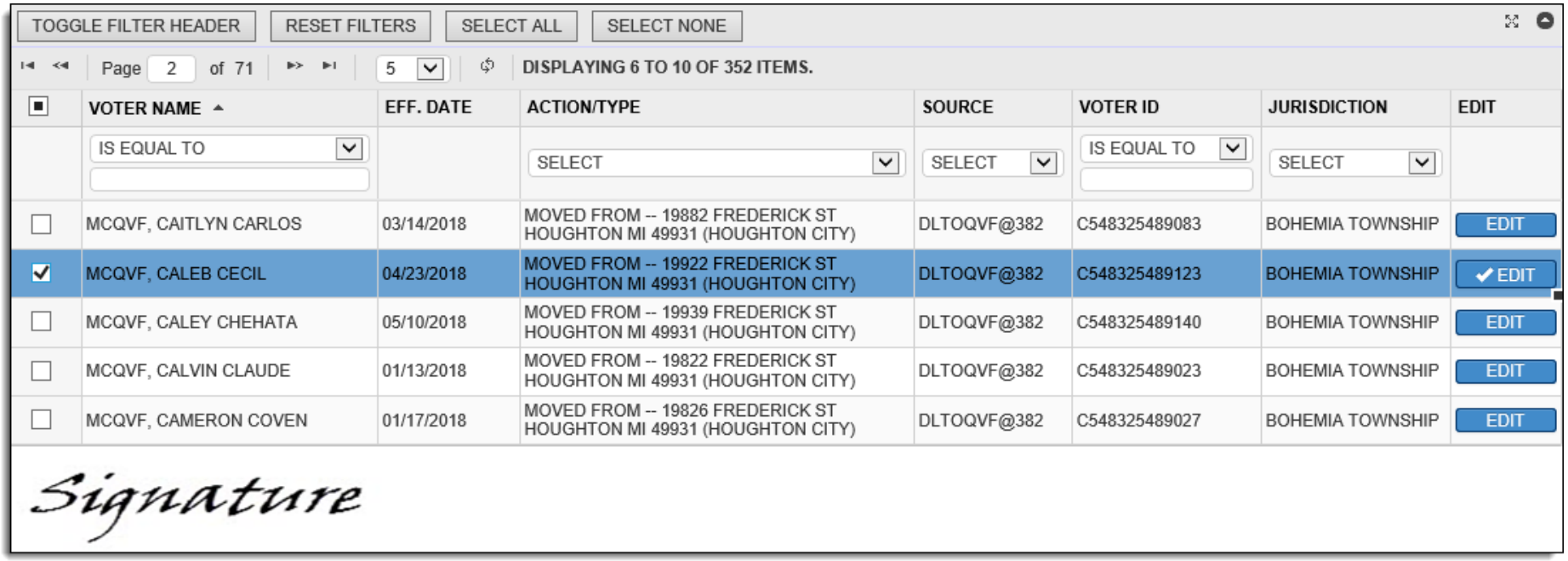
# Voter Notifications

Filter and Search tools

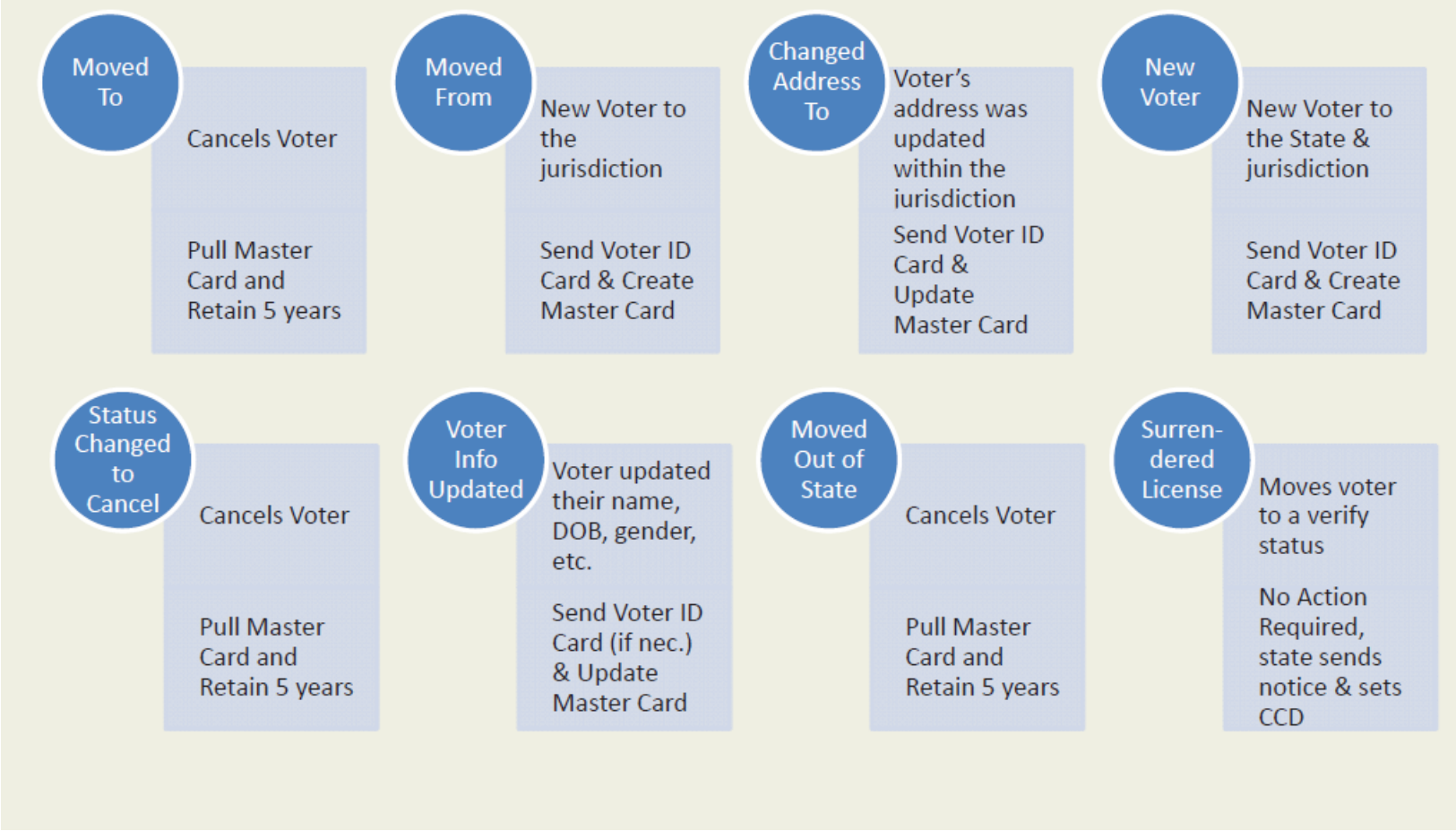
- Type, School District and Effective Dates
- View messages that were already closed
- Hide your own transactions
- Filter columns by content: Moved To, Moved From, Source and others…



# Voter Notifications



# Inbox


Moved To
Cancels Voter
Pull Master Card and Retain 5 years
Moved From
New Voter to the jurisdiction
Send Voter ID Card & Create Master Card
Changed Address To
Voter's address was updated within the jurisdiction
Send Voter ID Card & Update Master Card
New Voter
New Voter to the State & jurisdiction
Send Voter ID Card & Create Master Card
Status Changed to Cancel
Cancels Voter
Pull Master Card and Retain 5 years
Voter Info Updated
Voter updated their name, DOB, gender, etc.
Send Voter ID Card (if nec.) & Update Master Card
Moved Out of State
Cancels Voter
Pull Master Card and Retain 5 years
Surren-dered License
Moves voter to a verify status
No Action Required, state sends notice & sets CCD

# Voter Notifications

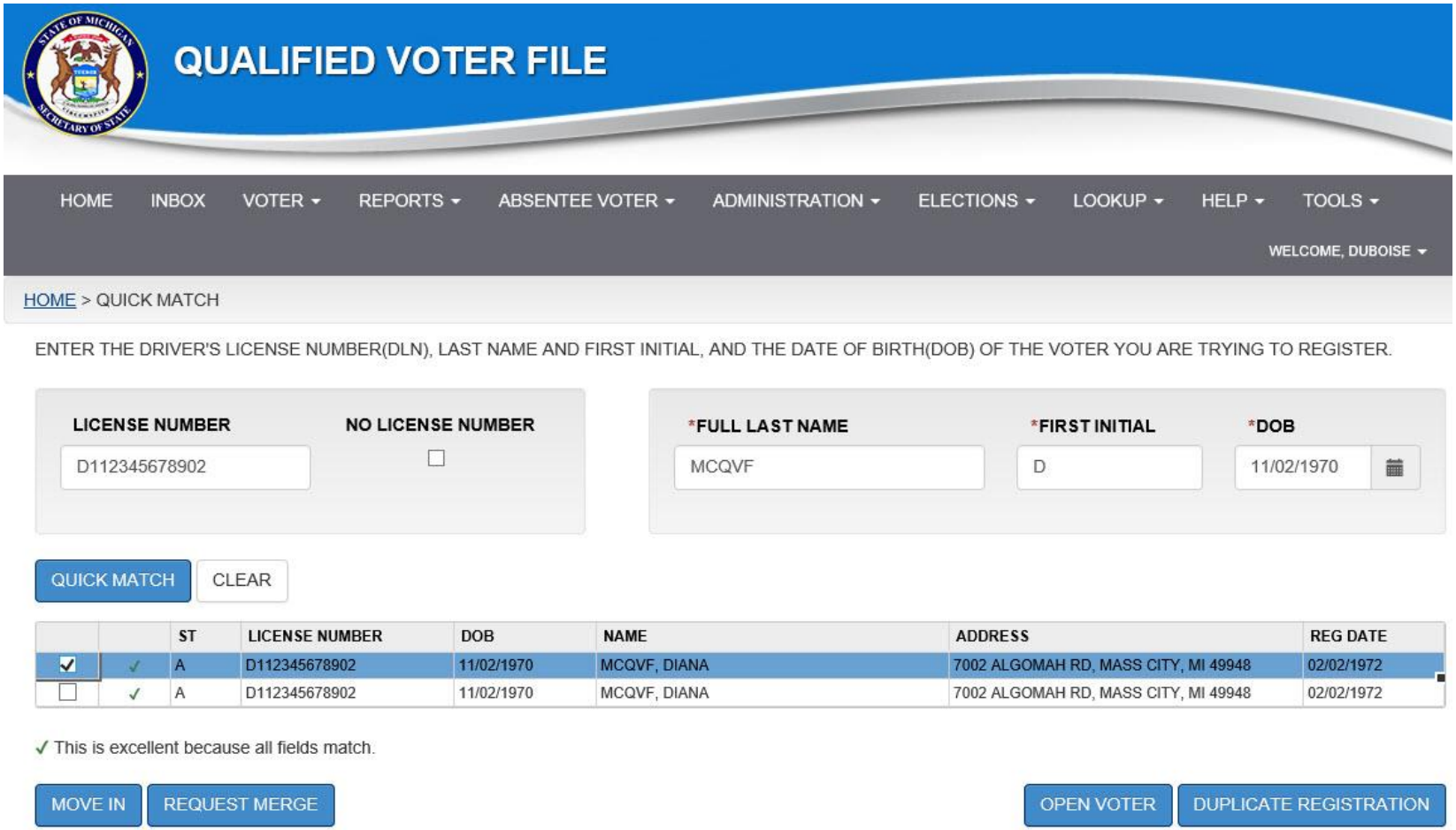
Source:

- MVIC & @830 = SOS online voter registrations
- ROCKTHEVOTE and other 3rd Party applications

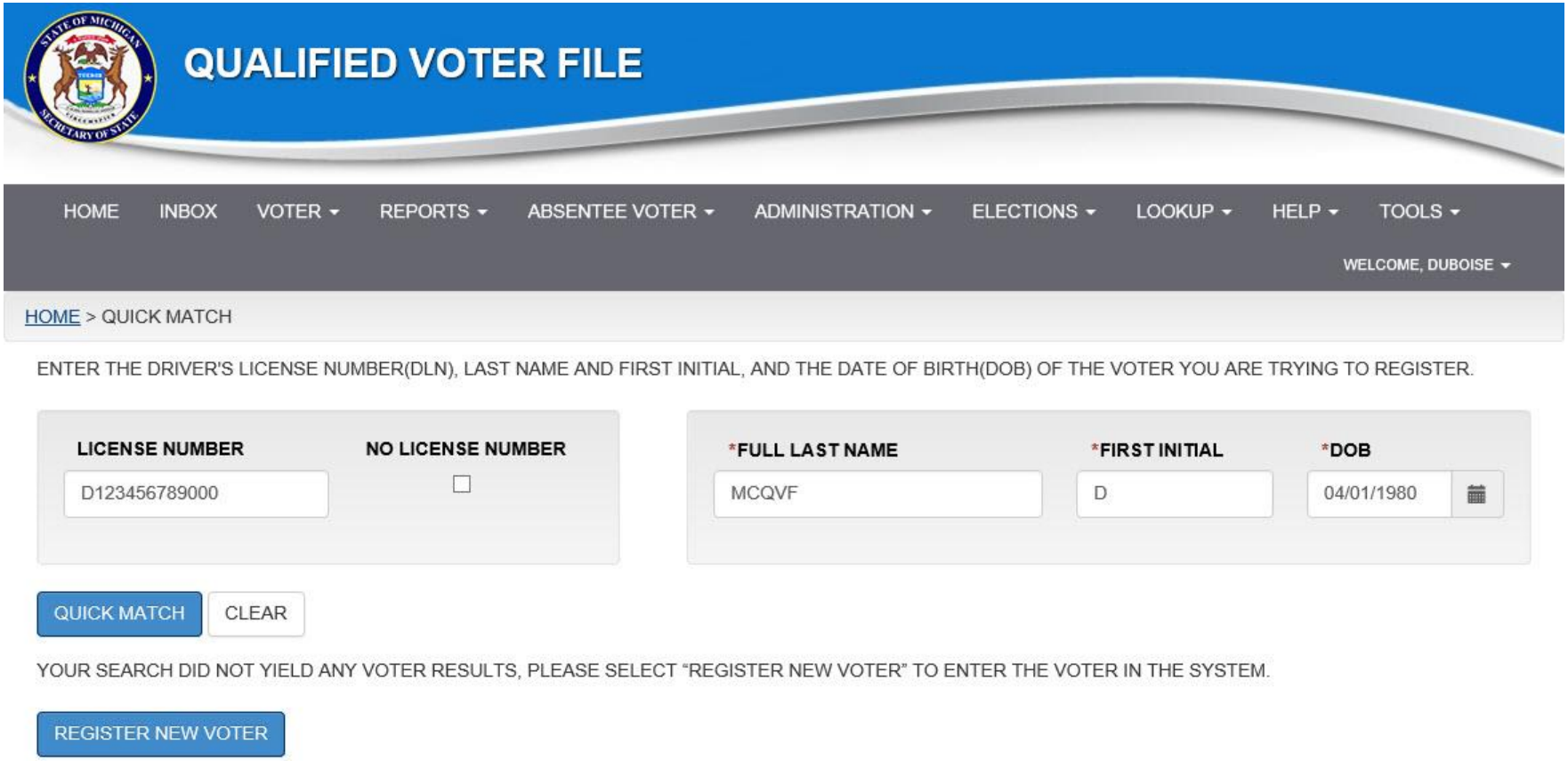
Registration applications must be processed in a timely manner, with or without receiving paperwork

- Online transactions:
  - MVIC, ExpressSOS, and Third-Party websites
- Paper applications without an inbox notice
- Signatures are available in QVF, even with Statewide search

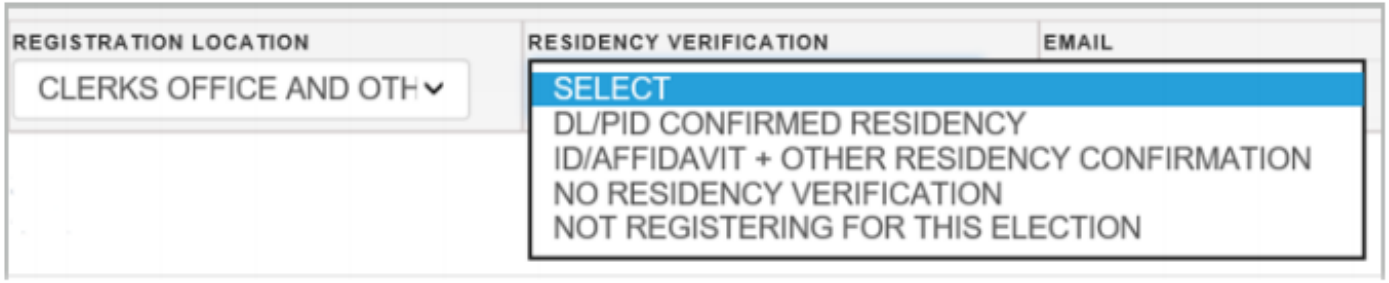
# Voter Registration: Quick Match



# Voter Registration: Registering a New Voter



# Registering a Voter Within 14 Days of an Election




**Residency Verification Breakdown**

| | | |
|---|---|---|
| **DL/PID Confirmed Residency** | Voter's DL or PID bears their registration address | Registration effective today **Regular Ballot** |
| **ID/Affidavit + Other Residency Confirmation** | Voter presents another form of ID or the Affidavit of Voter Not in Possession of Photo ID, plus other confirmation of residency in the city/township | Registration effective today **Challenged Ballot** |
| **No Residency Confirmation** | Voter does not present confirmation of residency | Registration +15 days. (Not qualified for this election until residency confirmation presented). **No Ballot can be issued.** |
| **Not Registering for this election** | Voter does not wish to be registered for this election | Registration is +15 days. **No Ballot can be issued.** |

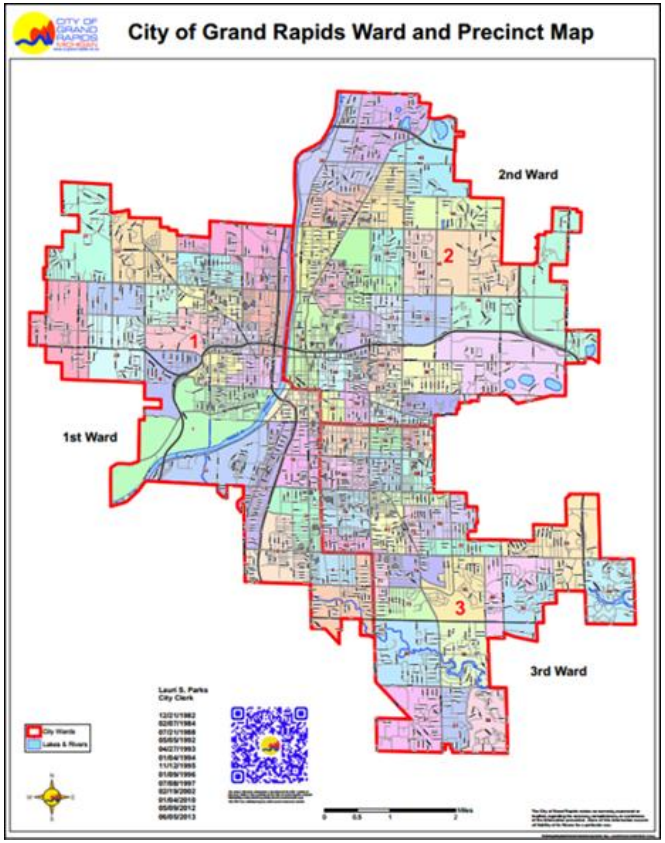
# Segment 2: Absentee Voting Street Index

Street Index is the backbone of QVF
- Links voters to districts and determines ballot style

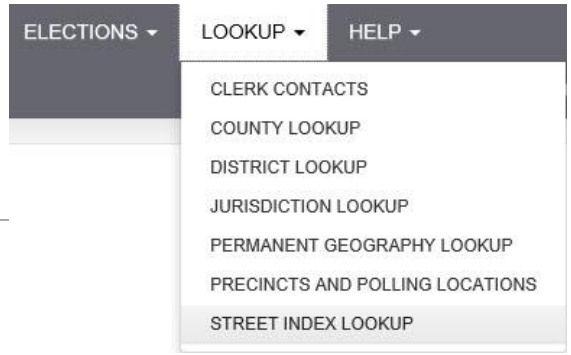
What's in it?
- Street Index Report
- Permanent Geography module

Errors in the Street Index?
- Wrong jurisdiction
- Wrong precinct list
- Wrong ballot style

Check your resources!
- Assessing or Equalization
- County GIS



# Street Index Lookup




*REGION TYPE: JURISDICTION

*REGION: BOHEMIA TOWNSHIP (09460)

REQUEST NEW | SEARCH | CLEAR

NUMBER | PARITY: BOTH

STREET | NTH: RO

POCITY

ZIPCODE

TOGGLE FILTER HEADER | RESET FILTERS

Page 1 of 1 | 25 | DISPLAYING 1 TO 3 OF 3 ITEMS.

| STREET NAME ▲1 | JURISDICTION | NUMBERS ▼2 | EXTENSION | ZIPCODE | COUNTY | |
|---|---|---|---|---|---|---|
| ROSSEAU RD | BOHEMIA TOWNSHIP | 101 - 571 B | | 49948 | ONTONAGON | REQUEST CHANGE |
| ROUSSEAU RD | BOHEMIA TOWNSHIP | 100 - 199 B | | 49948 | ONTONAGON | REQUEST CHANGE |
| ROUSSEAU RD | BOHEMIA TOWNSHIP | 5000 - 5999 B | | 49948 | ONTONAGON | REQUEST CHANGE |

# Street Index Help

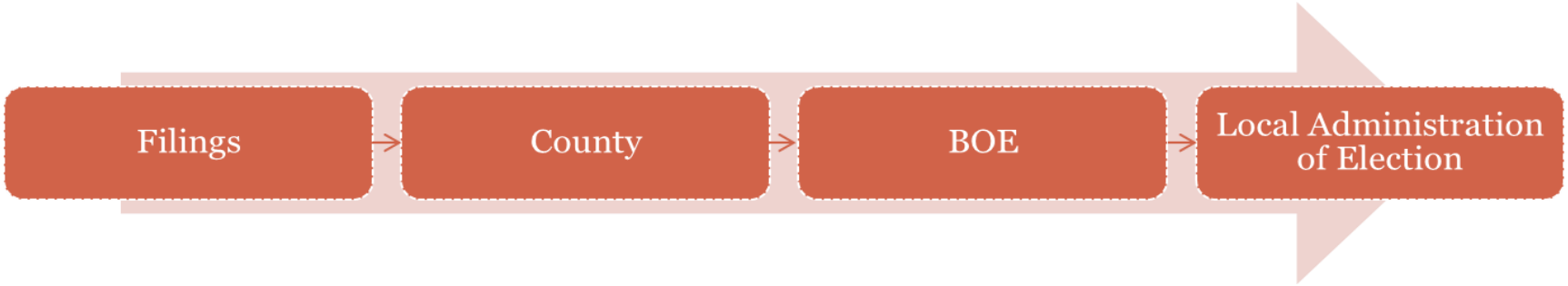
Changes and corrections to the Street Index must be communicated to the Bureau of Elections

- Street Index Lookup
- Work with a QVF Complete user to coordinate changes
- Contact Nicholas Daum
  - daumn1@michigan.gov
  - 517-335-1003

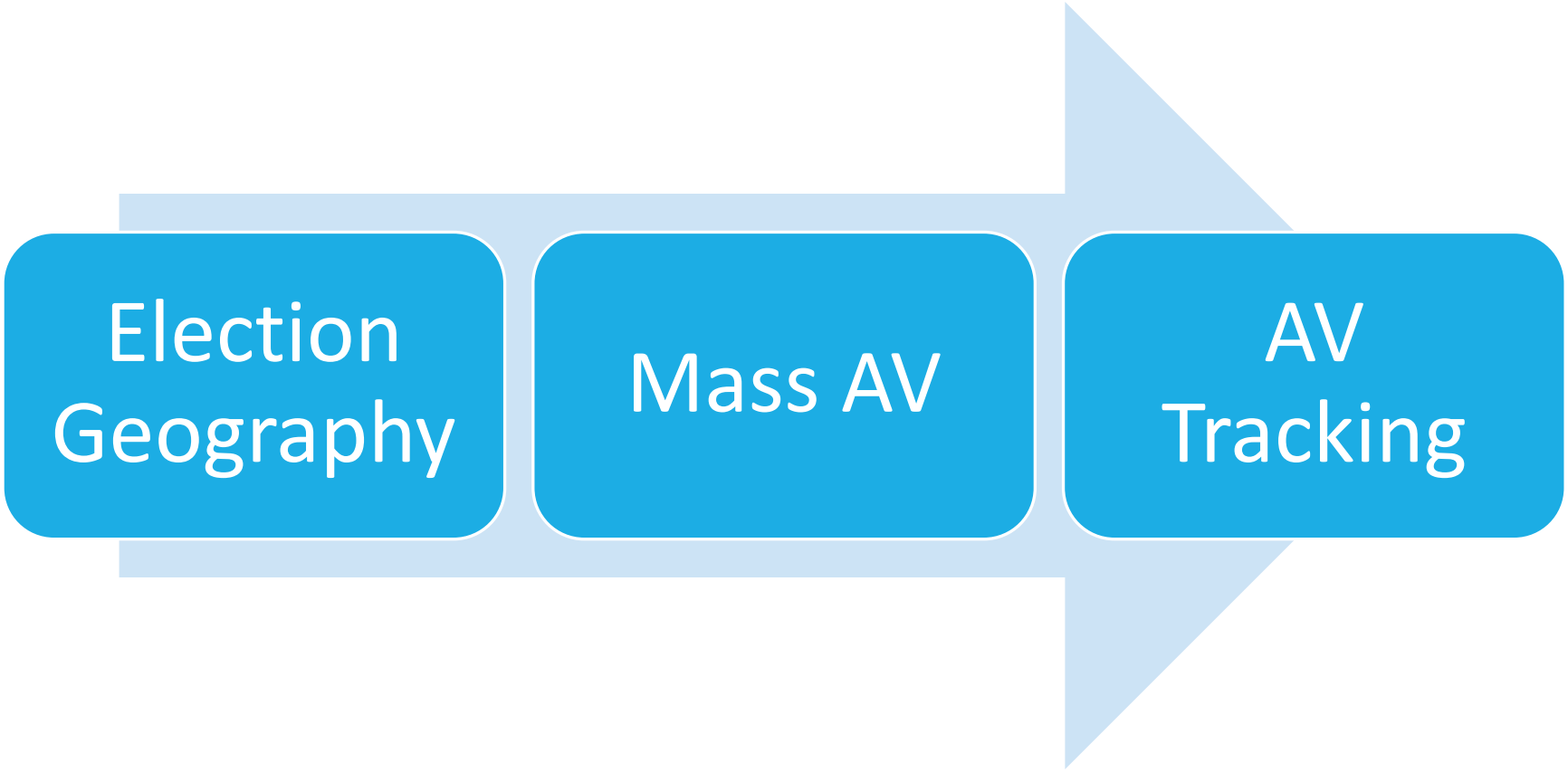
# Election Administration

Before absent voter application/ballot processing begins for a particular election, Counties work to establish offices, proposals, and assign election tasks in QVF

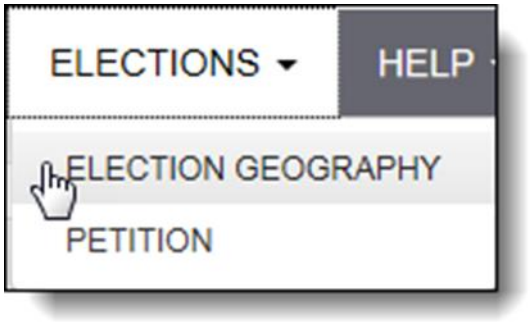
- Filings are taken by the County or forwarded to the County by the local clerk
- County completes the steps in the Ballot Administration module
  (and, for consolidated elections, the Duty List)
- Local clerk can begin election administration in QVF



# Local Election Administration after County completes Ballot Admin



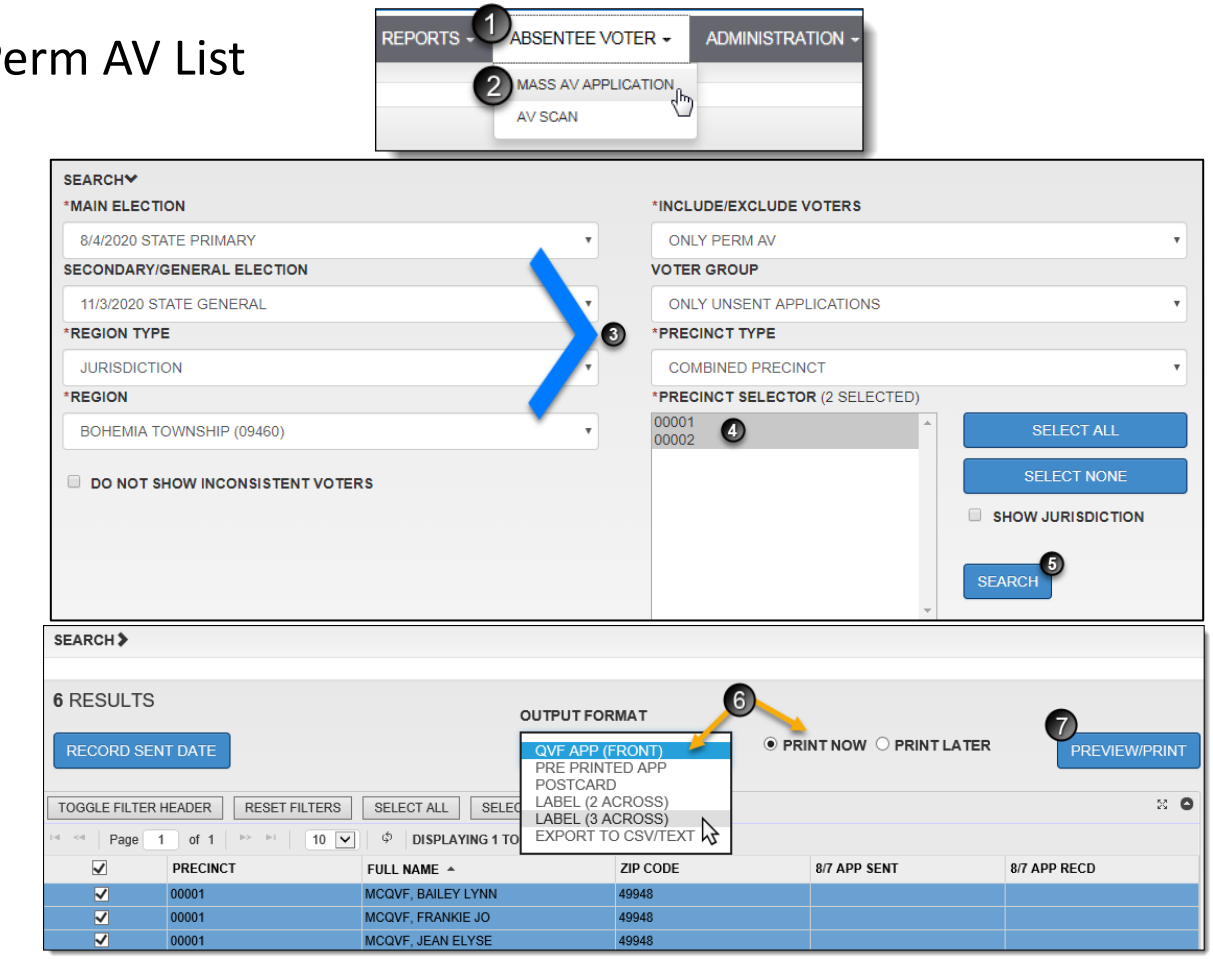
# Election Geography



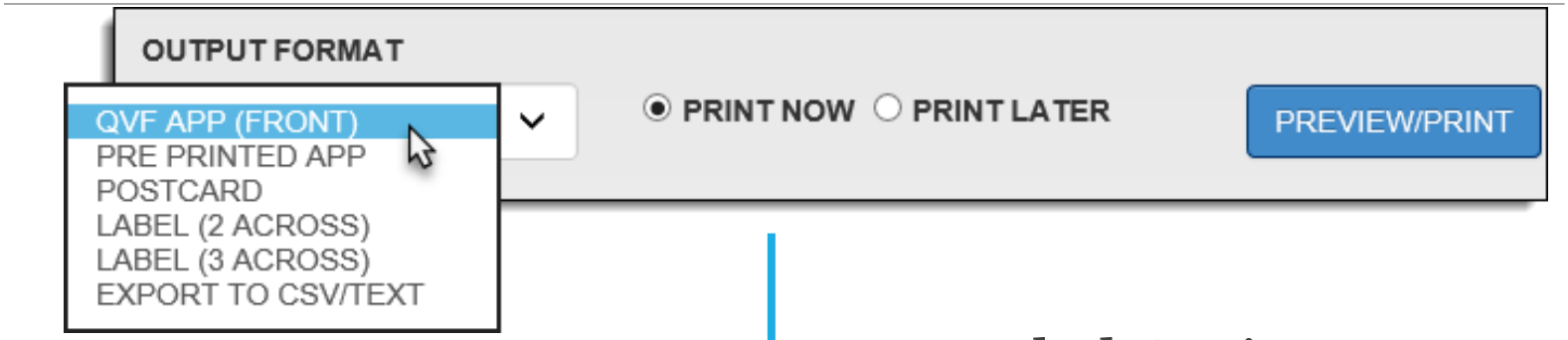

| | |
|---|---|
| **Combine Precincts** | **Ballot Style Alias** |
| **Temporary Polling Location Change** | **AV Counting Board** |

# Mass AV Applications

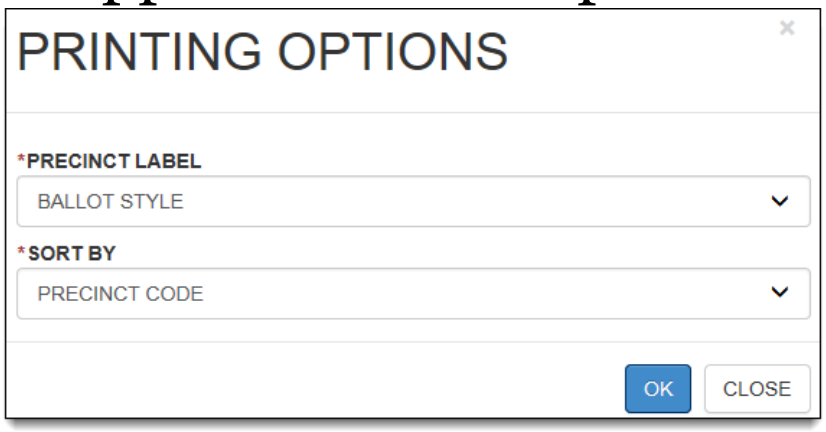
- Apps for Perm AV List



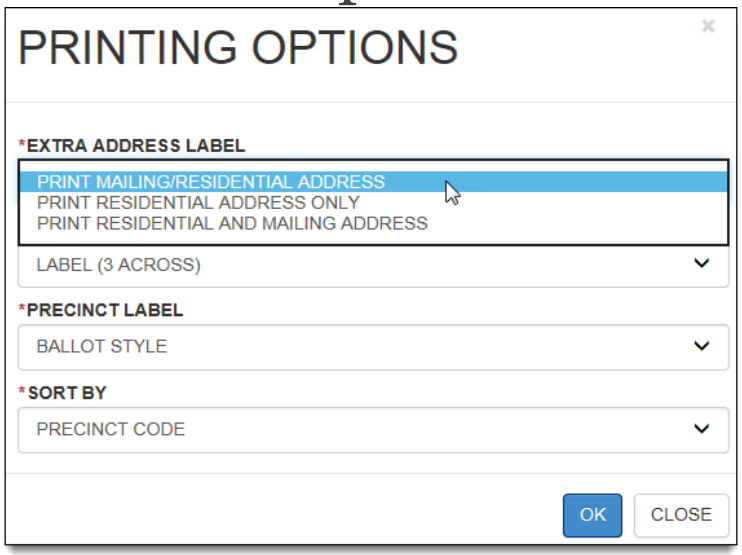
# Mass AV Applications




- App or Postcard Options

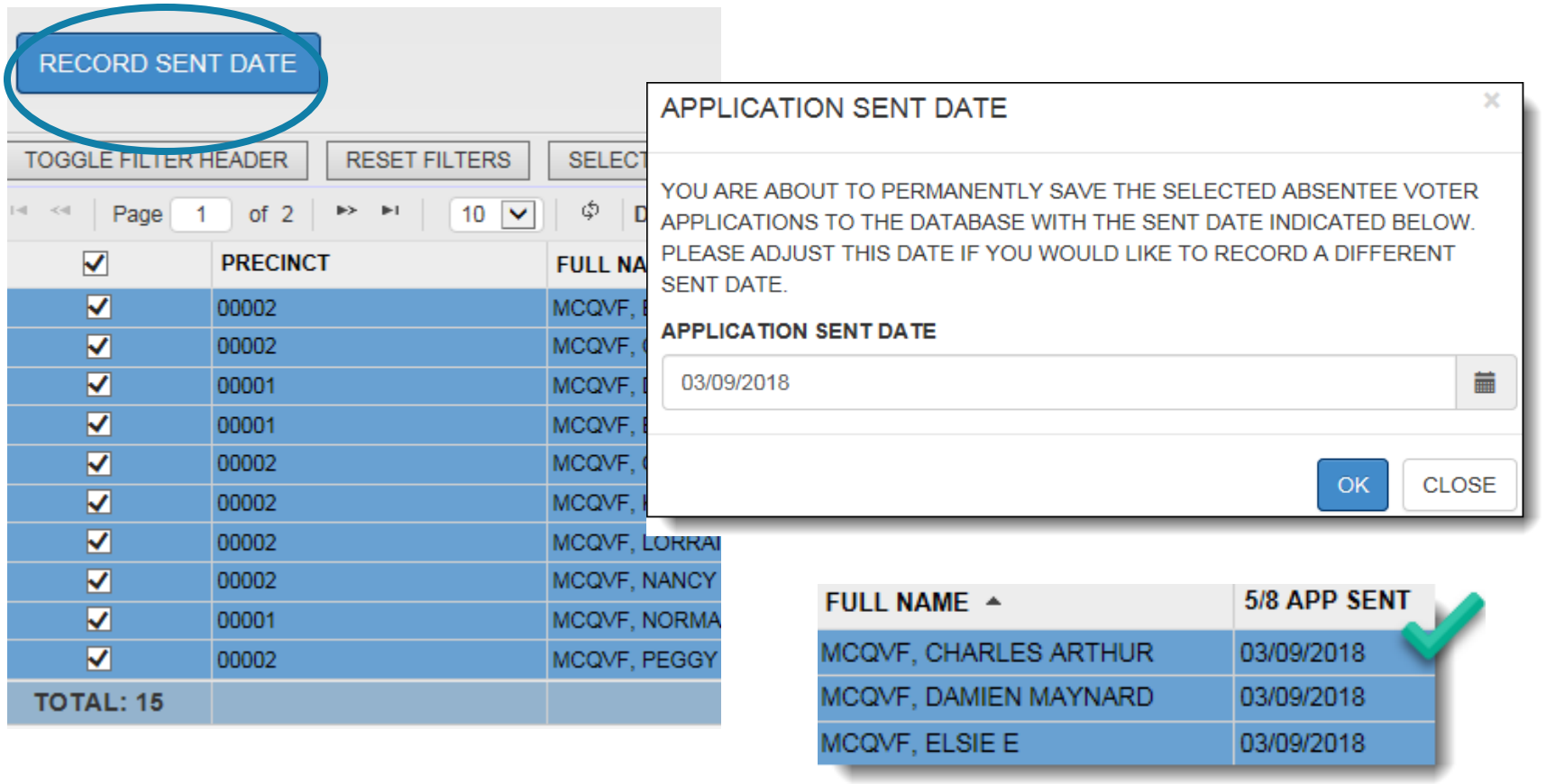



- Label Options



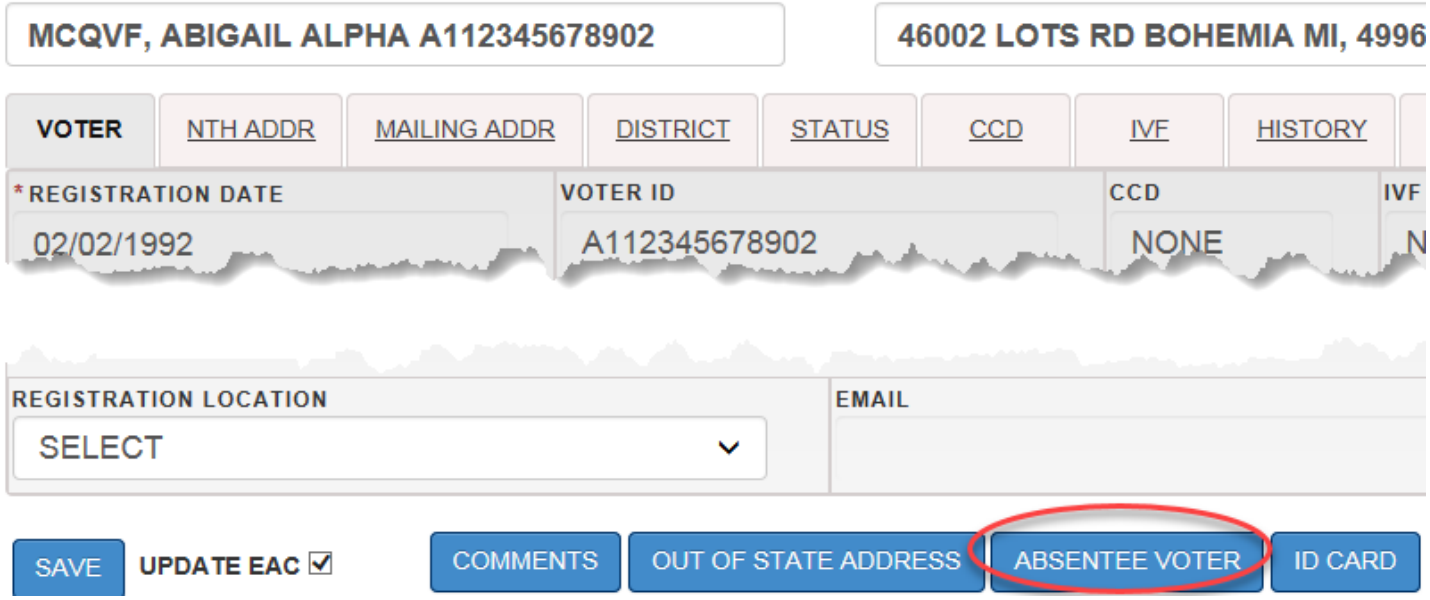
# Mass AV Applications

- Don’t forget to save the date!

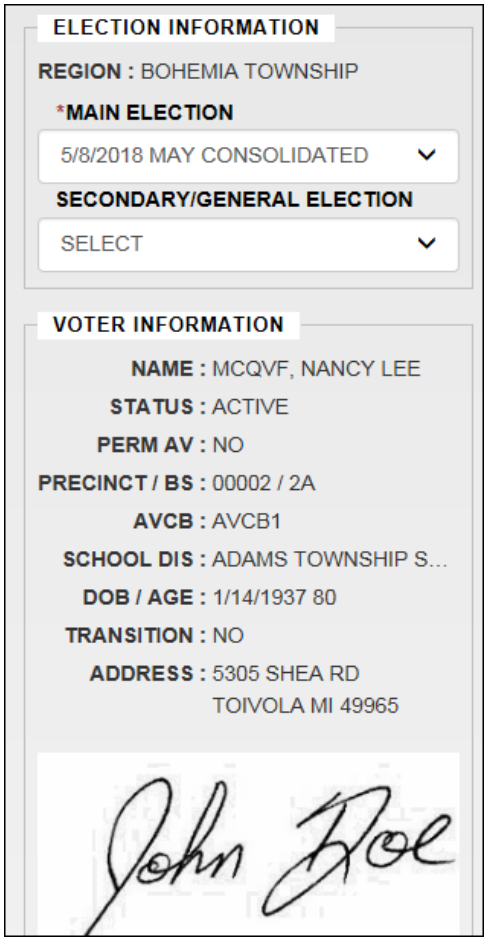


# Absentee Voter Tracking

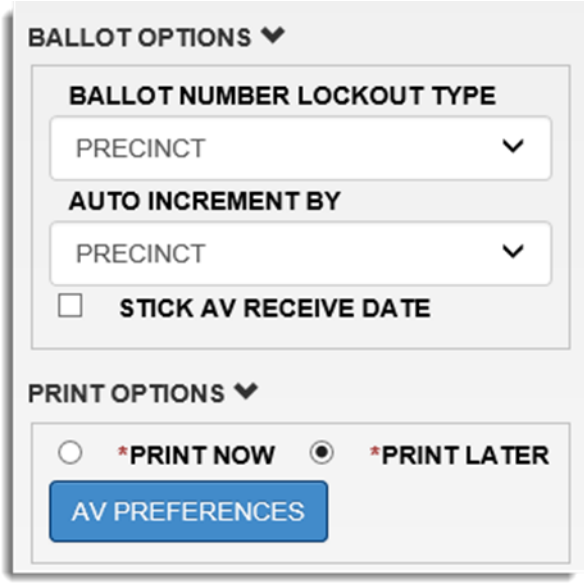
- Perform a voter search
- Find the voter and click Edit
- Click the Absentee Voter button



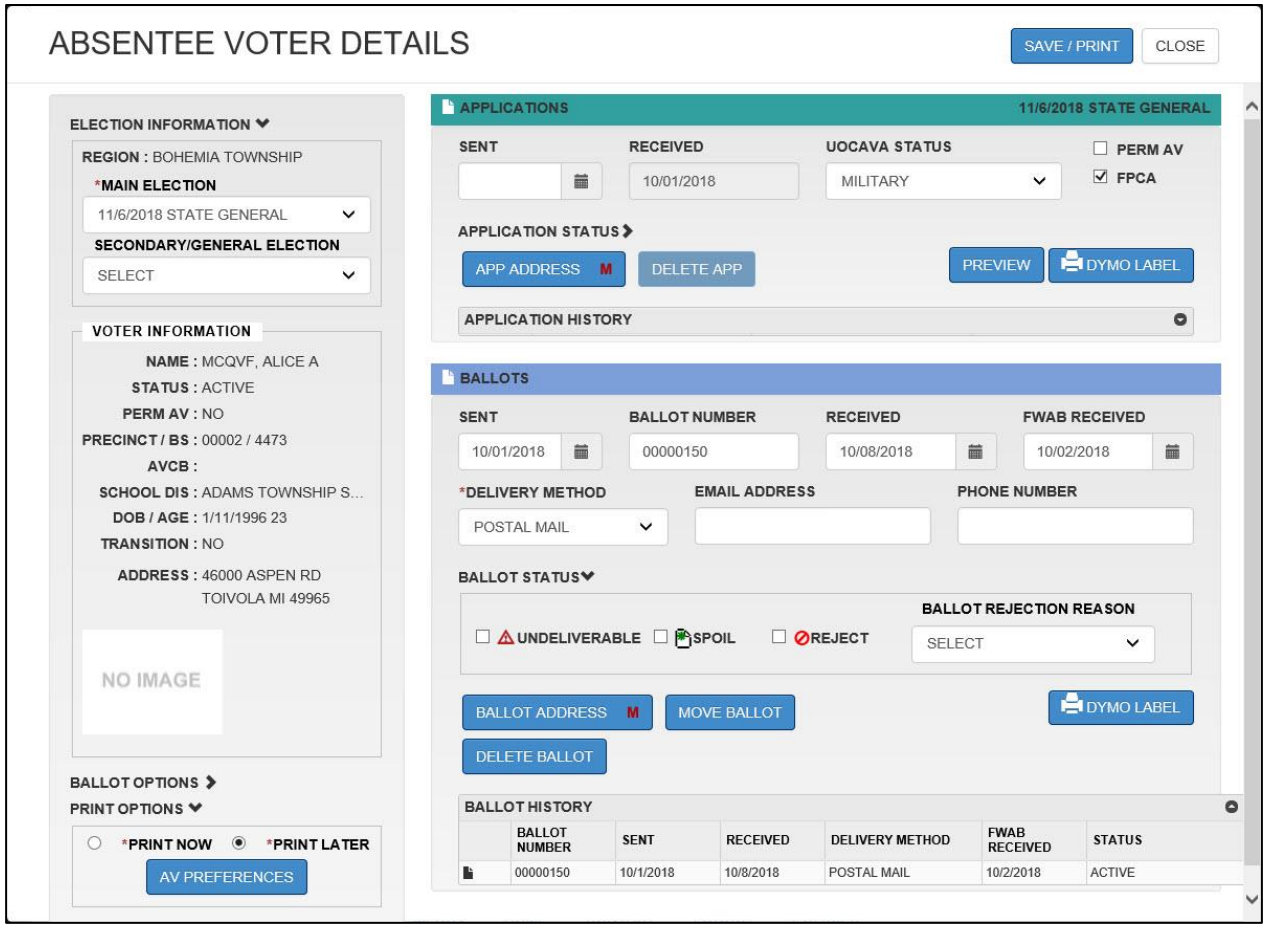
# AV Processing: AV Details



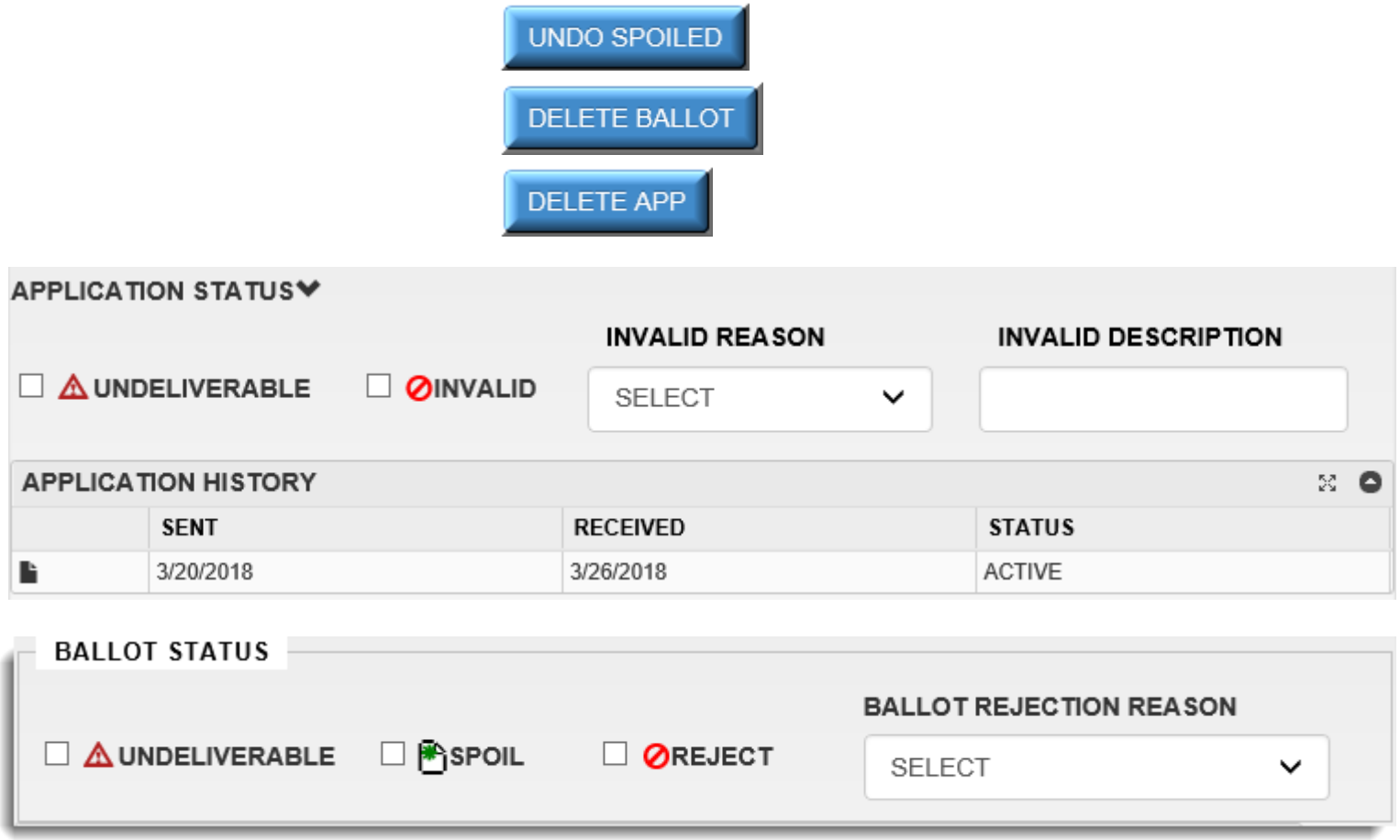

- Review your Election Date (set in Preferences)
- Note the Precinct, Ballot Style (BS), and Signature
- Check ballot lockout, auto increment settings and print options
- Verify or change default settings under AV Preferences



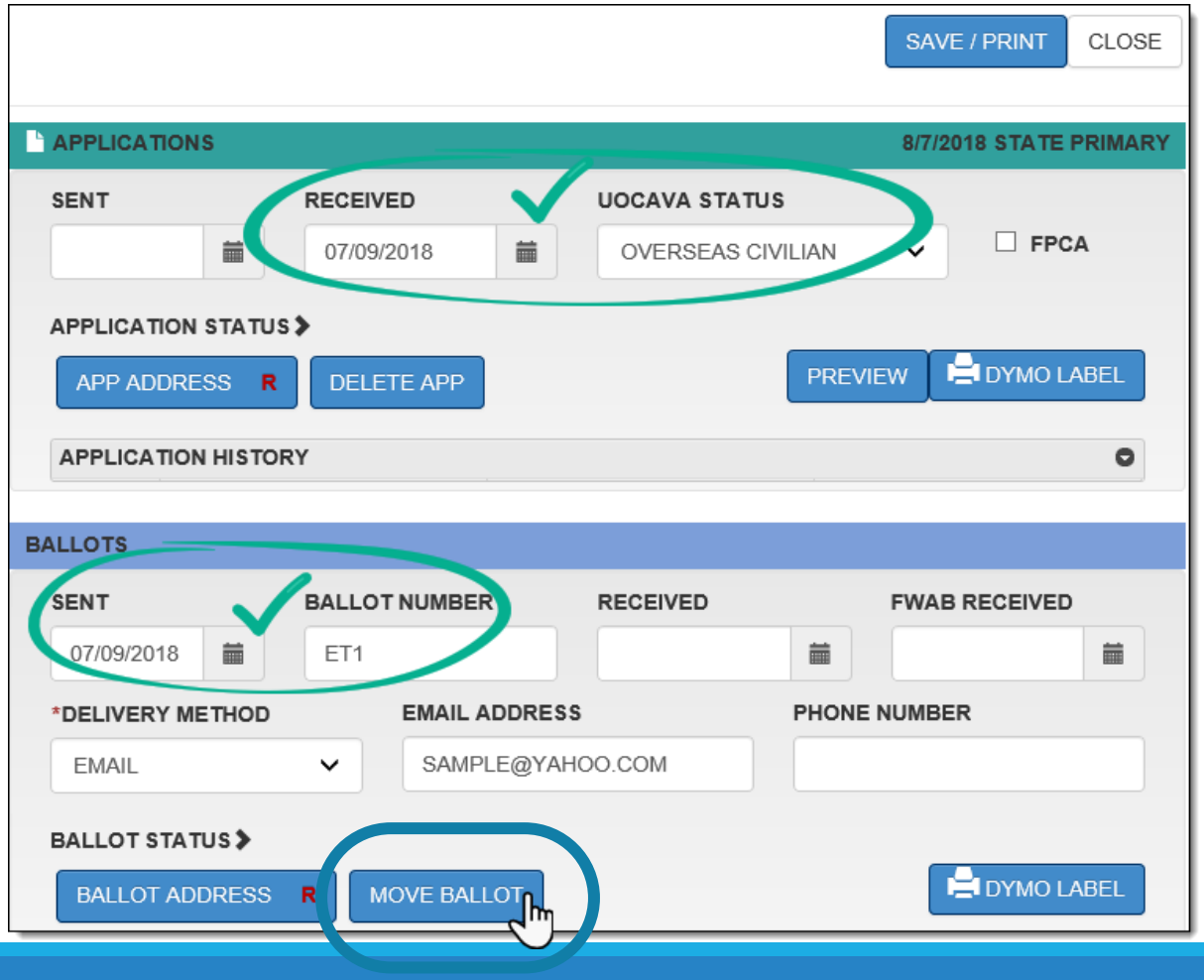
# Basic AV Tracking



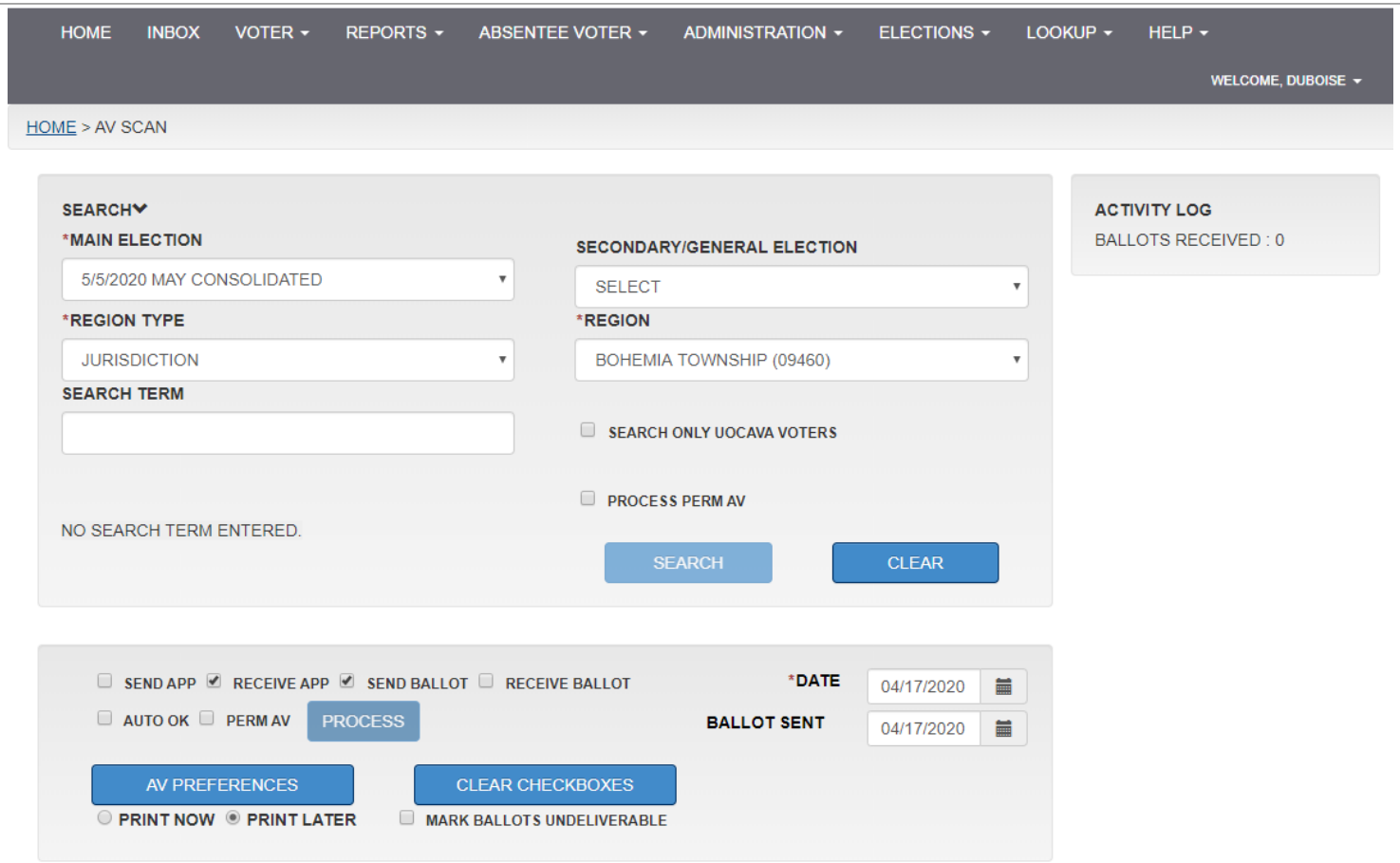
# Basic AV Editing



# MOVE Ballots



# AV Scan


HOME
INBOX
VOTER
REPORTS
ABSENTEE VOTER
ADMINISTRATION
ELECTIONS
LOOKUP
HELP
WELCOME, DUBOISE
HOME > AV SCAN
SEARCH
*MAIN ELECTION
5/5/2020 MAY CONSOLIDATED
SECONDARY/GENERAL ELECTION
SELECT
*REGION TYPE
JURISDICTION
*REGION
BOHEMIA TOWNSHIP (09460)
SEARCH TERM
SEARCH ONLY UOCAVA VOTERS
PROCESS PERM AV
NO SEARCH TERM ENTERED.
SEARCH
CLEAR
ACTIVITY LOG
BALLOTS RECEIVED : 0
SEND APP
RECEIVE APP
SEND BALLOT
RECEIVE BALLOT
AUTO OK
PERM AV
PROCESS
*DATE
04/17/2020
BALLOT SENT
04/17/2020
AV PREFERENCES
CLEAR CHECKBOXES
PRINT NOW
PRINT LATER
MARK BALLOTS UNDELIVERABLE

# AV Reports

**Ballots Sent & Returned Summary** - a total of ballots sent, returned, outstanding; and a breakdown of ballot types (UOCAVA & FWAB)

**AV List** - good for Election Day absentee ballot processing

**Daily AV** - good for fulfilling a FOIA request for AV transactions occurring within a specific date range

**Election Day FWAB No AV Ballot** - Federal Write-in Absentee Ballots to be counted on Election Day

**AV Delivery** - address type and delivery method for ballots

**Move Application/Ballot**- report by election date of Military and Overseas voters

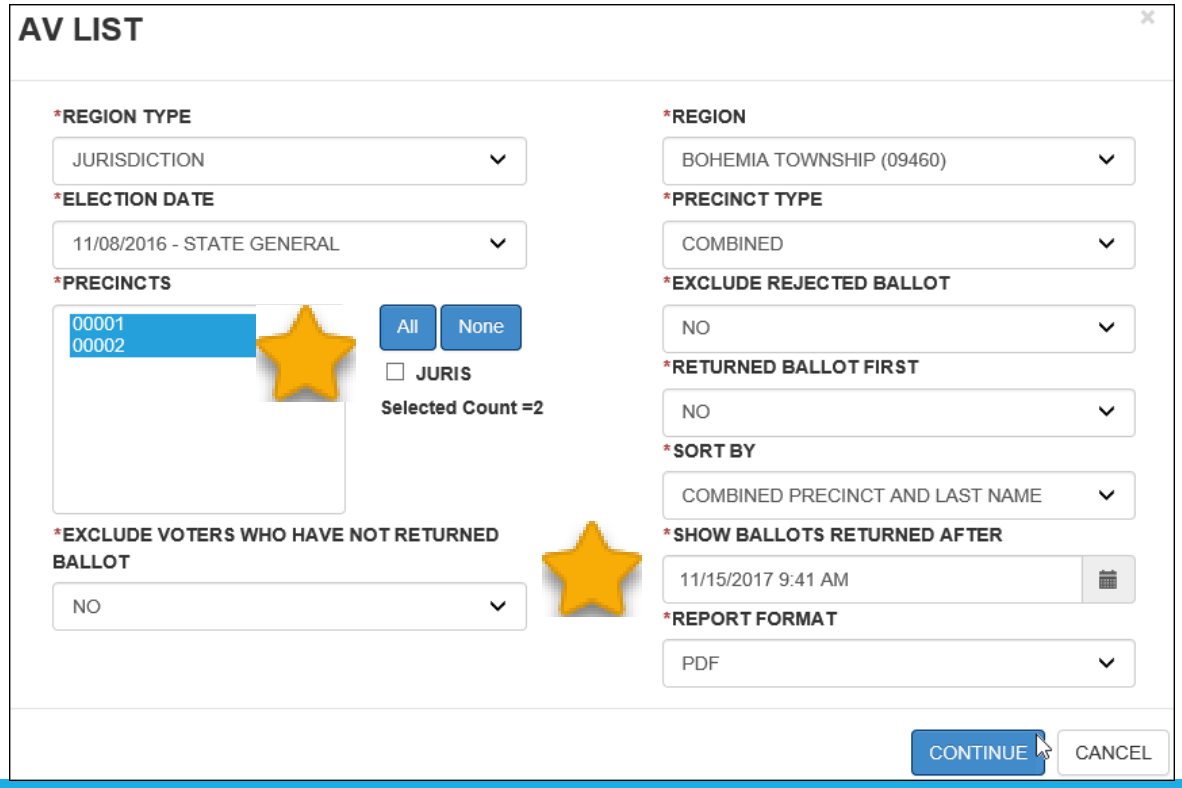
**Cancelled/Rejected/Moved Out Ballot List** - a report of Voters with absentee ballots who were cancelled, rejected, or moved out will appear on this report. May supplement your AV List when balancing your absentee ballots.

**AV Rejected**: Ballots marked rejected and the reason for rejection

**UOCAVA and FCPA by Year** - a list of those voters placed on a UOCAVA status by year, including an indication if they applied by FPCA form

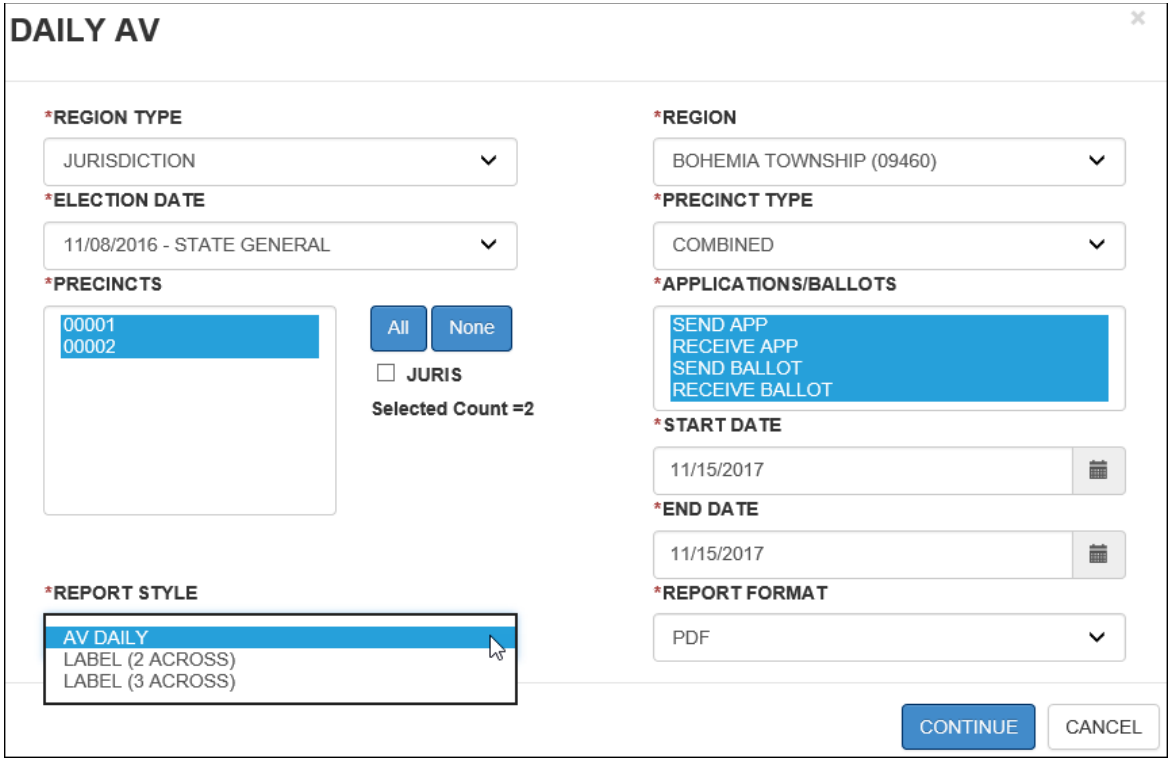
# AV List

- Good for Election Day AV ballot processing
- Absentee Ballot report includes names, ballot numbers, dates, and ballot status



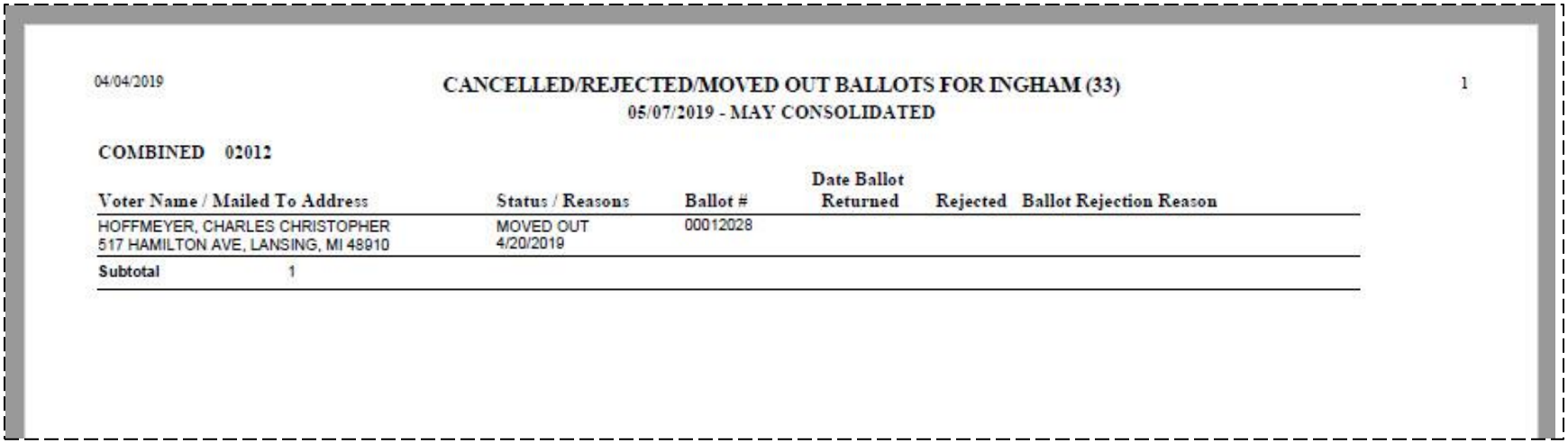
# Daily AV

- Good for fulfilling a FOIA request for AV transactions occurring within a specific date range



# Cancelled/Rejected/Moved Out Report

- A report of Voters with absentee ballots who were cancelled, rejected, or moved out.
- May supplement your AV List when balancing your absentee ballots.



04/04/2019

**CANCELLED/REJECTED/MOVED OUT BALLOTS FOR INGHAM (33)**
**05/07/2019 - MAY CONSOLIDATED**

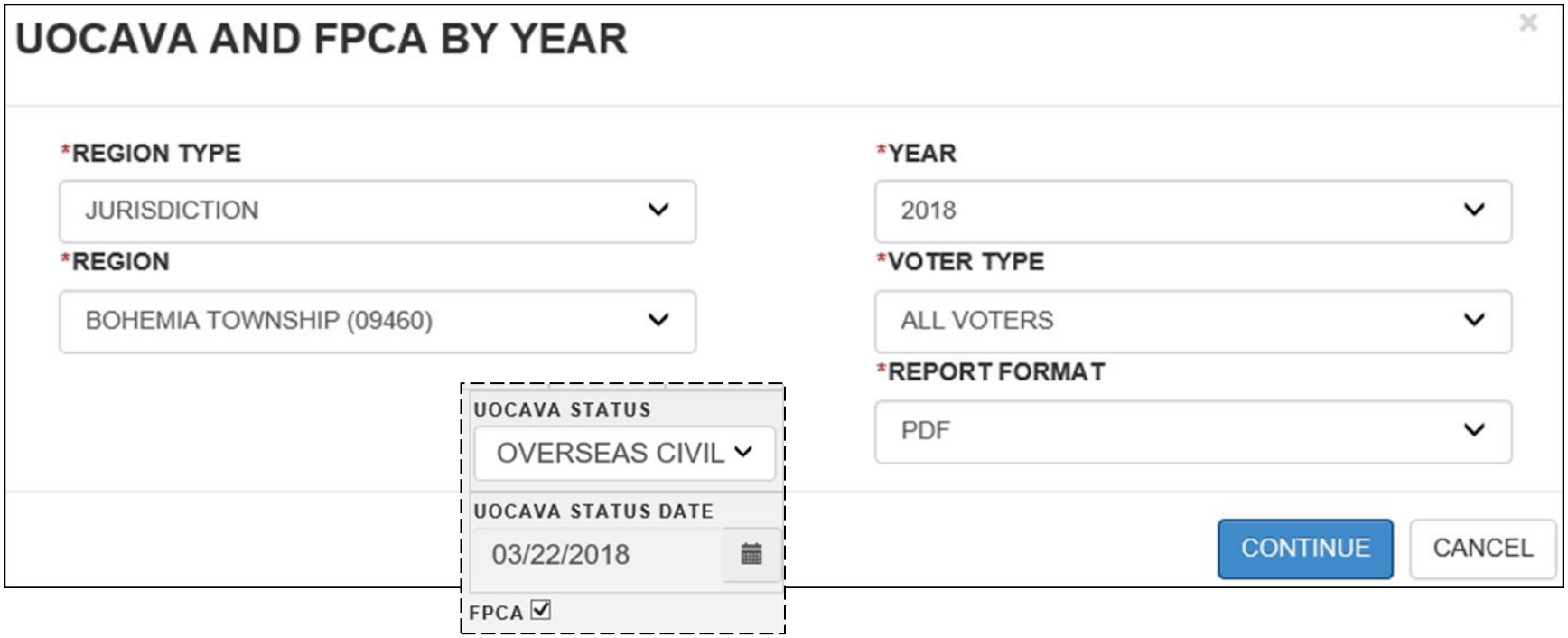
1

**COMBINED 02012**

| Voter Name / Mailed To Address | Status / Reasons | Ballot # | Date Ballot Returned | Rejected | Ballot Rejection Reason |
|---|---|---|---|---|---|
| HOFFMEYER, CHARLES CHRISTOPHER<br>517 HAMILTON AVE, LANSING, MI 48910 | MOVED OUT<br>4/20/2019 | 00012028 | | | |
| **Subtotal** 1 | | | | | |

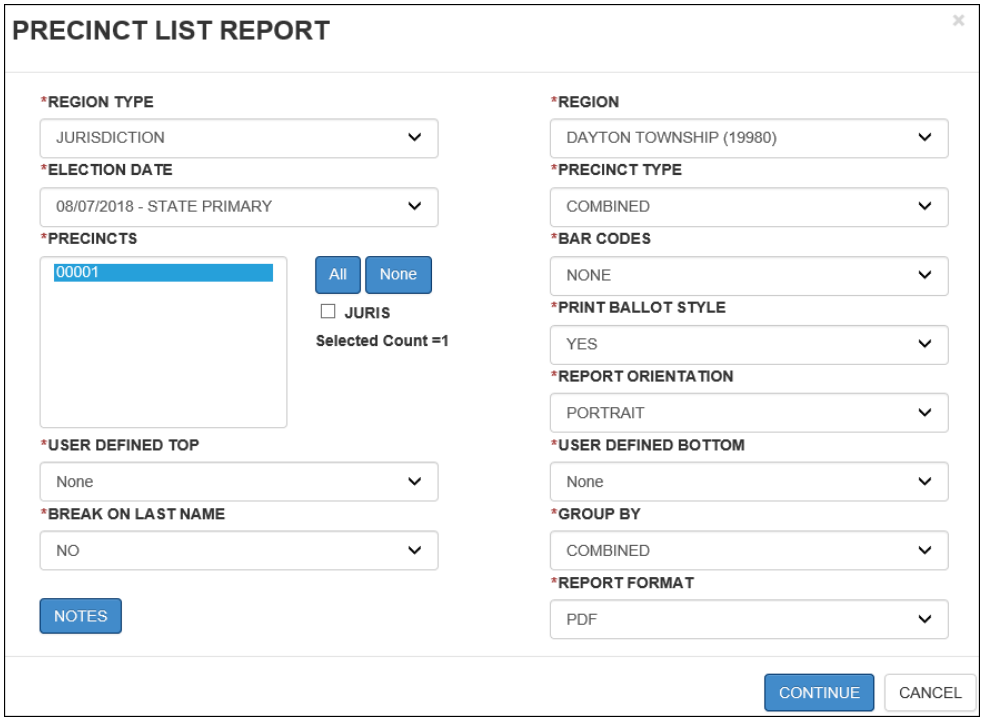
# UOCAVA & FPCA by Year

- A list of those voters placed on a UOCAVA status by year, including an indication if they applied by FPCA form



# Precinct List

- A list of eligible voters for use the precinct on Election Day in the event the Electronic Pollbook becomes unavailable
- Print Monday after 4 p.m. immediately before election



Segment 3

# QVF Election Administration Task Calendar

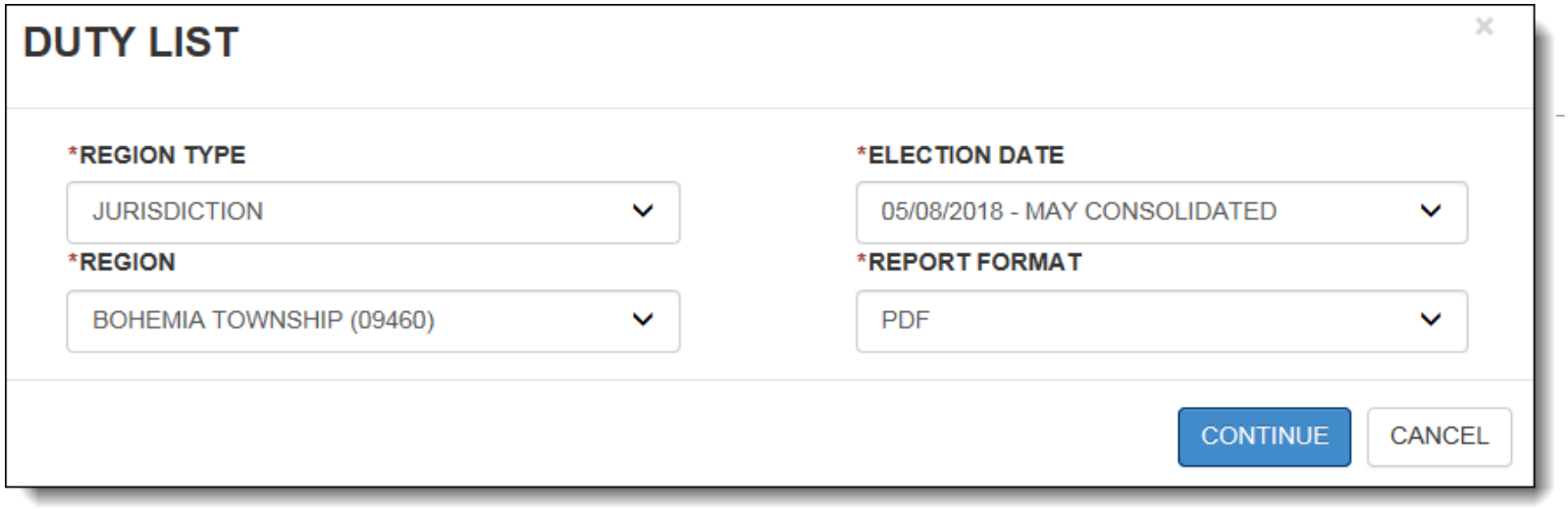
| Timeline | Task | Description |
|---|---|---|
| 80-60 days | Ballot Admin* (Counties) | Offices, Proposals, Duty List |
| 60-45 days | Ballot Alias, Combine Precincts, update Polling Locations, AVCB (if necessary) | Election Geography* |
| | Review Duty List & Candidate List for non-State and Federal Elections | Reports |
| 45 days | Existing UOCAVA absentee voter ballots sent | AV Scan & AV Details |
| | Send AV applications to permanent AV voters, if not done already | Mass AV |
| | Ongoing processing of AV ballot requests | AV Scan & AV Details |
| | Any outstanding voter registrations processed in QVF should be completed by this time, and keep processing promptly | Quick Match* (Basic users process registrations occurring within 14 days of Election Day) |

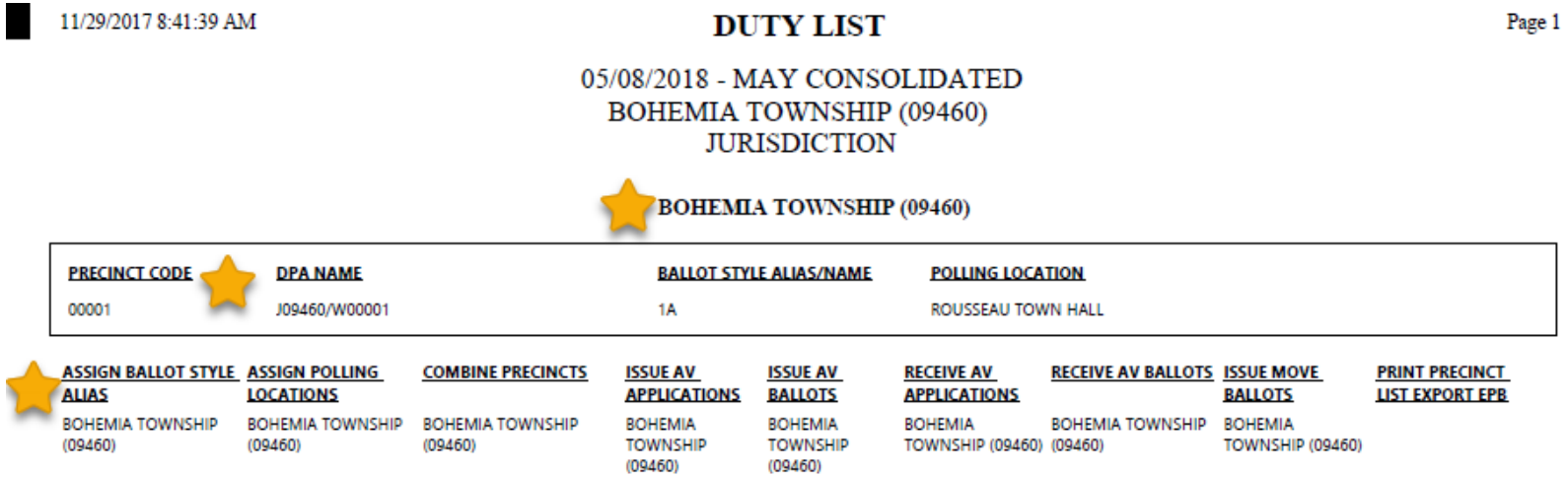
**Access limited based on account type*

# Task calendar cont'd.

| Timeline | Task | Description |
|---|---|---|
| Day before Election, after 4pm | Export files, install and prepare E-Pollbook software | EPB & other… |
| | Print a paper precinct list (paper backup) | Reports |
| Within 1 wk after Election | Update voting history | Import voting history file, and complete manual adjustments |
| 7 days after certification of Election results | Uninstall E-Pollbook program, delete all election related files from the laptop and the flash drive **unless subject to audit, recount, or court stay* | EPB laptop |
| Every 30-60 days | EPB Laptop updates:<br>Microsoft, anti-virus, malware detection | EPB laptop (ongoing maintenance) |
| 90-20 days before Election | Practice using EPB: export, installation, processing voters, reports….<br>**do not practice importing history* | EPB (ongoing practice & maintenance) |
| ---------- Repeat ---------- | | |

# Duty List



11/29/2017 8:41:39 AM

**DUTY LIST**

Page 1

05/08/2018 - MAY CONSOLIDATED
BOHEMIA TOWNSHIP (09460)
JURISDICTION

**BOHEMIA TOWNSHIP (09460)**

| PRECINCT CODE | DPA NAME | BALLOT STYLE ALIAS/NAME | POLLING LOCATION |
|---|---|---|---|
| 00001 | J09460/W00001 | 1A | ROUSSEAU TOWN HALL |

| ASSIGN BALLOT STYLE ALIAS | ASSIGN POLLING LOCATIONS | COMBINE PRECINCTS | ISSUE AV APPLICATIONS | ISSUE AV BALLOTS | RECEIVE AV APPLICATIONS | RECEIVE AV BALLOTS | ISSUE MOVE BALLOTS | PRINT PRECINCT LIST EXPORT EPB |
|---|---|---|---|---|---|---|---|---|
| BOHEMIA TOWNSHIP (09460) | BOHEMIA TOWNSHIP (09460) | BOHEMIA TOWNSHIP (09460) | BOHEMIA TOWNSHIP (09460) | BOHEMIA TOWNSHIP (09460) | BOHEMIA TOWNSHIP (09460) | BOHEMIA TOWNSHIP (09460) | BOHEMIA TOWNSHIP (09460) | |

# Security Standards

- **Protect** your computer and network
- **Protect** access to Qualified Voter File and E-Pollbook software resources
- **Protect** voter records

# Don’t Forget!

## Complete the rest of the curriculum

- Print *QVF Troubleshooting Guide*
  - Set up browser & workstation printing
- Print *QVF Profile Preferences*
  - Set up account defaults

## Practice exercises are available from eLearning

- You may request a “training” account

## Software Support

- QVF website
  - Help > QVF Reference Manual
  - Help > Release Notes
- eLearning Center = manuals & video tutorials
- Help Desk 800-310-5697 & QVFHelpDesk@michigan.gov