



Clear Ballot

ClearVote 1.5

Personnel Deployment and

Training Plan

ClearVote Personnel Deployment and Training Plan

Clear Ballot Part Number: 100058-10013

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Preface

This section defines the purpose of this document. It contains the following subsections.

- About this document
- Scope of this document
- Intended audience
- Contact us

About this document

This document provides information about the staff needed to run the ClearVote system, as well as the training required for the various roles. It corresponds to the *VVSG 2005, Volume 2, Section 2.10* requirement for the Technical Data Package (TDP).



A ClearVote™ system can comprise the ClearAccess™, ClearAudit™, ClearCast™, ClearCount™, and ClearDesign™ products. Jurisdictions are not required to purchase all products. You can ignore references to any ClearVote components that are not part of your voting system. Also ignore implementation options that are not relevant to your policies and procedures.

Scope of this document

This document describes the personnel deployment and training requirements for the ClearVote system. It includes the following aspects of the ClearVote system:

- [ClearVote product suite](#)
- [Personnel](#)
- [Training](#)

Intended audience

This document is intended for election officials and election staff who are responsible for operations and maintenance before, during, and after an election. This document is also used by Clear Ballot personnel who support election officials and election staff.

Contact us

Clear Ballot Group welcomes your feedback on our documentation. Please send comments to Documentation@ClearBallot.com.

If you have questions about using your ClearVote product, contact your Clear Ballot representative.



Chapter 1. ClearVote product suite

ClearVote uses modern software architecture and scalable unmodified commercial off-the shelf (COTS) hardware to provide a faster, lower cost, and higher-performing election experience.

- ClearDesign, the election management system (EMS) component of ClearVote, is used to create ballot styles and generate election definitions. Ballot styles are rendered as PDFs. Election definitions are exported to ballot definition files (BDFs) for import into ClearCount.
- ClearAccess is an accessible voting and ballot-marking application that allows voters with sight or mobility limitations to vote in an unassisted manner.
- ClearCast is an in-person optical-scan voting system usually deployed at the polling place.
- ClearCount is a central-count, paper-based, optical-scan voting system.
- ClearAudit is an independent, automated election auditing solution.



Routine cleaning and maintenance tasks described in the ClearVote user documentation can be performed by the jurisdiction, as can items documented on the ClearCast maintenance placard. Other maintenance and repair tasks need to be performed by Clear Ballot staff, or factory or manufacturer personnel.

Chapter 2. Personnel

Responsive to VVSG 2005, Volume 2, Section 2.10.1.

The following personnel with the specified skill and staffing levels are required by ClearVote for each of the functions described below.

In the case of higher level and supervisory roles, the activities may be delegated to staff or performed by the individual implied by that role description.

2.1 Determining staffing level

The number of staff members needed is highly dependent upon the size of the election. However, in all cases, there must be at least one supervisor and one IT/system administrator to allow for segregation of duties, and to ensure that there is more than one person with knowledge of the ClearVote system and its operations.

2.2 Screening election staff

Screening of election staff (such as, performing background checks) is the responsibility of the jurisdiction using the ClearVote system.

2.3 Election operations staffing

The following sections describe election operations roles.



For definitions of access levels, see the administrator's documentation for each product.

2.3.1 Ballot developer role

The following describes the ballot developer role.

Staffing

One individual

Qualifications

- Experience in local election matters
- Experience with Microsoft Windows
- Proficiency in the ClearVote system through training with the identified documents and videos (See "Jurisdiction staff training" on page 18.)
- Proficiency in the certified EMS or ClearDesign



Table 2-1. Ballot developer tasks

Operation	Tasks
Ballot development pre-election	<ul style="list-style-type: none"> • Create and lay out ballots for an election. • Proof the election. • Generate ballot definition files (BDFs) and accessible definition files (ADFs), as well as the ballot PDFs to send to the printer.

2.3.2 IT/System administrator role

The following describes the IT/system administrator role.

Staffing

One individual per site

Qualifications

- Sufficient IT skills to connect hardware, install software, and perform basic testing and troubleshooting tasks
- Experience auditing system security for a closed network
- Experience in elections programming preferred
- BS in computer science or software engineering
- Microsoft Certified Solutions Expert certification preferred

Table 2-2. IT/System administrator tasks

Operation	Tasks
Pre-election and election preparations	<ul style="list-style-type: none"> • Set up hardware and scanners and install necessary software. • Ensure the system-hardening process is complete and remains uncompromised. • Set up and configure network switch. • Troubleshoot system issues, and contact and work with Clear Ballot Technical Support as necessary.
Preventive maintenance	Test the physical system prior to an election. (This action occurs prior to early voting when early voting is supported.)
Central-count scanning	Address technical issues and escalate as needed.
Diagnosis of faulty hardware or software	Diagnose faulty computer hardware, scanners, or connections. Troubleshoot software issues.

Operation	Tasks
Corrective maintenance	Repair faulty computer hardware or connections. (Scanners are repaired by the vendor.)
Testing to verify the correction of problems	Test computer hardware, scanners, or connections that have been fixed.
Post-election	<ul style="list-style-type: none"> Issue election reports for review. Back up databases. Break down and store ClearVote hardware.

2.3.3 Principal supervisor role

The following describes the principal supervisor role.

Staffing

One individual per site

Qualifications

- Expertise in local election matters
- Proficiency in the ClearVote system through training with the identified documents and videos (See "Jurisdiction staff training" on page 18.)
- Proficiency in the certified EMS or ClearDesign

Table 2-3. Principal supervisor tasks

Operation	Tasks
Pre-election and election preparations	<ul style="list-style-type: none"> Prepare and securely transmit ballot style PDFs to Clear Ballot, which uses them to create ballot definition files (BDFs). If using ClearDesign, supervise lay out and proofing of ballot PDFs. Receive and validate BDFs. Perform logic and accuracy (L&A) testing that includes ClearCount, ClearAccess and ClearCast when deployed. Secure the Tabulator. Create users and assign/change access levels and passwords. Obtain necessary election resources (equipment, location, and staffing).



Operation	Tasks
Central-count scanning	<ul style="list-style-type: none"> Oversee central-count scanning operations. Monitor staff adherence to local election and ClearVote processes and procedures. Review and produce ClearVote election reports.
Postelection tasks	<ul style="list-style-type: none"> Examine election results and resolve discrepancies. Publicize results. Ensure the safe transport of ballots and equipment. Break down scanning location.

2.3.4 Assistant supervisor role

The following describes the assistant supervisor role.

Staffing

One individual per site

Qualifications

- Expertise in local election matters
- Proficiency in the ClearVote system through training with the identified documents and videos (See "Jurisdiction staff training" on page 18.)
- Proficiency in the certified EMS or in ClearDesign

Table 2-4. Assistant supervisor tasks

Operation	Tasks
Pre-election and election preparations	<ul style="list-style-type: none"> Create and verify election in ClearDesign, ClearAccess, ClearCast, and ClearCount. Assist the principal supervisor with pre-election and election preparations.
Central-count scanning	<ul style="list-style-type: none"> Ensure the database phase is set appropriately for the election. Ensure the appropriate election is the <i>active</i> election. Assist the principal supervisor in central-count scanning. Review ballot and write-in resolutions.

Operation	Tasks
Postelection tasks	<ul style="list-style-type: none"> Examine election results and resolve discrepancies. Publicize results. Ensure the safe transport of ballots and equipment. Break down scanning location. Assist the principal supervisor with postelection activities.

2.3.5 Poll worker role

The following describes the poll worker role.

Staffing

Two or more individuals per site, or as required by jurisdiction, to allow for segregation of duties, and to ensure that there is more than one person with knowledge of the poll worker responsibilities.

Qualifications

- Proficiency in the ClearVote system through training with the identified documents and videos (See "Jurisdiction staff training" on page 18.)
- Proficiency in the ClearAccess system
- Proficiency in Election Day processes involving ClearCast

Table 2-5. Poll worker tasks

Operation	Task
Pre-election and election preparations	<ul style="list-style-type: none"> Unpack and inventory voting equipment. Verify and record seal numbers. Ensure ClearAccess and ClearCast voting equipment is correctly configured, functional, and ready for voting. Ensure the proper poll-opening activities are carried out at the beginning of the voting process.

Operation	Task
Early voting center or Election Day	<p>Maintain security as follows:</p> <ul style="list-style-type: none"> • Ensure access to the ClearAccess and ClearCast stations is supervised at all times. • Maintain confidentiality of ClearAccess voter password. • Ensure every voter is accompanied to the ClearAccess station by an authorized poll worker. • Ensure voter's privacy is maintained throughout the voting process. • Ensure ClearAccess units display the voting login prompt when not in use. • Verify that seals remain intact on: <ul style="list-style-type: none"> ◦ ClearAccess USB ports ◦ Filled ballot box ◦ ClearCast station • Restrict access to the ballot box. • Ensure no ClearAccess ballots circulate in the voting location other than those being deposited by voters in the secure ballot box provided. • Maintain appropriate levels of consumables. • Maintain ballot accounting for ClearCast ballots. • Ensure cleanliness and integrity of polling area and equipment. • Prior to voting, provide the voter with an overview of the ballot input/presentation configuration that he or she will be using (touchscreen, EZ Access keypad, or sip-and-puff device).
Postelection tasks	<ul style="list-style-type: none"> • At the end of every early voting day, shut down (but do not close) ClearAccess. • At the end of Election Day, close the polls in ClearAccess and ClearCast. • Follow card reconciliation procedures. • Disassemble and pack ClearAccess and ClearCast equipment and other supplies in the polling place. • Follow closing instructions provided by the jurisdiction.

2.3.6 Scanning supervisor role

The following describes the scanning supervisor role.

Staffing

One individual for every four ScanStations per site

Qualifications

- Expertise in local election matters
- Proficiency in the ClearVote system through training with the identified documents and videos (See "Jurisdiction staff training" on page 18.)

Table 2-6. Scanning supervisor tasks

Operation	Task
Pre-election and election preparations	Oversee preparation staff and scanner operators.
Central-count scanning	<ul style="list-style-type: none"> • Oversee scanner operators and ensure that Tabulators are open and ready for ballot scanning. • Monitor staff adherence to local election and ClearVote processes and procedures. • Oversee staff preparation of ballots before and after scanning to minimize jams. • Manage ballot jams. • Assist scanner operators with scanning problems; use the DeleteBox utility as necessary. • Oversee proper labeling of boxes at ScanStations for storage. • Oversee usage of consumables and ensure required resources are available to all scanner operators as necessary. • Review and produce ScanStation reports. • Oversee transfer of boxes to designated area.
Postelection tasks	Oversee process of breaking down scanning locations.



2.3.7 Preparation staff role

The following describes the preparation staff role.

Staffing

One individual for every four scanners per site

Qualifications

Trained in local election and ClearVote system ballot-handling processes and procedures with the identified documents and videos (See "Jurisdiction staff training" on page 18.)

Table 2-7. Preparation staff tasks

Operation	Tasks
Pre-election and election preparations	Print the necessary target cards and box labels from the PDFs provided.
Central-count scanning	<ul style="list-style-type: none">• Prepare and maintain ballots before and after scanning.• Jog the ballots prior to scanning to minimize scanner jams.• Affix all labels to boxes.• Assign a target card to each batch of ballots.• Deliver boxes of ballots to ScanStations.• Retrieve boxes of scanned cards from ScanStations.
Postelection tasks	Break down preparation area.

2.3.8 Recordkeeper role

The following describes the recordkeeper role.

Staffing

One individual per site

Qualifications

Trained in local elections, as well as Clear Ballot and local recordkeeping requirements

Table 2-8. Recordkeeper tasks

Operation	Tasks
Central-count scanning	Record all activity surrounding opening, recording, and resealing sealed ballot boxes or bags.



2.3.9 Scanner operator roles

The following describes the scanner operator role.

Staffing

One individual per scanner

Qualifications

- Experience in local election matters
- Experience with Microsoft Windows
- Proficiency in the ClearVote system acquired through training with the identified documents and videos (See "Jurisdiction staff training" on page 18.)

Table 2-9. Scanner operator tasks

Operation	Tasks
Central-count scanning	<ul style="list-style-type: none"> • Scan batches of ballots on a single ScanStation. • Appropriately summon scanning supervisor for help with scanning problems.

2.3.10 Scanner maintenance and troubleshooting role

The following describes the scanner maintenance and troubleshooting role.

Staffing

One individual per site

Qualifications

Training by Fujitsu service agent

Table 2-10. Scanner maintenance and troubleshooting personnel tasks

Operation	Tasks
Pre-election and election preparations	Perform standard preventive maintenance tasks prior to the election.

Scanner operations	<ul style="list-style-type: none"> Perform routine scanner troubleshooting (escalating to Clear Ballot, or Fujitsu, if necessary). Clean the scanners periodically (every 4 hours or after every 10,000 ballots scanned). Replace scanner consumables (such as rollers), if needed.
Postelection	Perform recommended postelection maintenance for scanners.

2.3.11 Ballot resolution staff role

The following describes the ballot resolution staff role.

Staffing

Local procedures and law generally prescribe a team of multiple persons to perform ballot resolution, so at least one team is needed for this role.

Qualifications

- Experience in local election matters
- Experience with Microsoft Windows
- Authority to duplicate a damaged ballot by hand and to classify write-in votes
- Proficiency in the ClearCount system through training with the identified documents and videos (See "Jurisdiction staff training" on page 18.)

Table 2-11. Ballot resolution staff tasks

Operation	Tasks
Ballot resolution at election central	<ul style="list-style-type: none"> Ensure all cards are properly read by the system. Accept assignments to adjudicate some known, bounded sets of ballots (such as a box, also known as a batch) and perform the requested adjudication.

2.3.12 Election reporter role

The following describes the election reporter role.

Staffing

One individual per site.

Qualifications

Trained in local elections procedures and the Clear Ballot reporting software.

Table 2-12. Election reporter tasks

Operation	Tasks
Post-election tasks	Access election reports and produce results.

2.3.13 Public relations official role

The following describes the public relations official role.

Staffing

One individual per site.

Qualifications

Trained in local elections and public relations procedures and the Clear Ballot reporting software.

Table 2-13. Public relations official tasks

Operation	Tasks
Post-election tasks	Access election reports and publicize results.

Chapter 3. Training

Responsive to VVSG 2005, Volume 2, Section 2.10.2.

The following sections describe the requirements for the orientation and training of various types of personnel on the ClearVote system.

3.1 Training requirements covered in this plan

The following defines the ClearVote documentation and training materials provided for the personnel described in this document.

3.1.1 Jurisdiction staff training

At least one member of every jurisdiction's election staff must attend an in-person training course. The Clear Ballot In-Person Training course provides attendees with a full description of every major aspect of the ClearVote system.

To pass the training course, an individual must successfully demonstrate a complete understanding of running an election using the ClearVote system from start to finish. Attendees are then able to provide additional training and support to those jurisdictional staff who cannot attend an in-person training.

3.1.2 Documentation resources

The jurisdictional election staff is expected to have access to the following documentation resources.



Some manuals address multiple roles. Staff members only need to concern themselves with the content that is relevant to their roles.

Table 3-1. ClearAccess documentation resources

Installation Guide	Maintenance Guide	Poll Worker Guide	Supervisor Guide
IT/System administrator			
X			
Supervisor/Assistant supervisor			
	X		X
Poll worker			
		X	

Table 3-2. ClearCast documentation resources

Installation Guide	Maintenance Guide	Poll Worker Guide	Supervisor Guide
IT/System administrator			
X			
Supervisor/Assistant supervisor			
	X		X
Poll worker			
		X	

Table 3-3. ClearCount documentation resources

Election Preparation and Installation Guide	Election Administration Guide	System Operations Procedures	Maintenance Guide	Scanner Operator Guide	Fujitsu documentation
IT/System administrator					
X		X	X		X
Principal supervisor/Assistant supervisor					
X	X	X	X	X	X
Scanning supervisor/Scanner operator					
	X		X	X	X
Preparation staff					
	X				
Scanner maintenance/troubleshooting staff					
X	X		X	X	X
Recordkeeper					
	X				
Ballot resolution personnel					
	X				

Table 3-4. ClearDesign documentation resources

Administration Guide	Installation Guide	Maintenance Guide	User Guide
IT/System administrator			
	X		
Supervisor/Assistant supervisor			
X		X	X
Ballot developer			
			X

3.1.3 Clear Ballot staff training

Clear Ballot field service operations employees receive the following training, at a minimum:

- Company orientation training
- Annual compliance training
- On-the-job training
- All applicable formal training related to the products and equipment he or she is servicing