

# How to use the Modern Polling App: Presiding Officer

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## MODERN POLLING

### Welcome to Modern Polling (PO)

As a Presiding Officer you can perform the exact same tasks as the Poll Clerk, however you are also responsible for supporting the Poll Clerk if issues occur with the app or iPad. At close of poll your primary responsibility is to submit the Ballot Paper Account (BPA).



# Course Overview

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Overview

Please confirm your council. This is required to complete this course.

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## 2. Getting Started

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How to open the Modern Polling app

Receiving your one-time passcode

Checking your polling station details

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  - 📖 When you scan the Voter's Poll card their details are displayed on screen
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 Scanned a qr code on poll card, instead of the qr code on the ballot paper

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# Getting Started

**Learning objective:** Learn how to log into the iPad and Modern Polling using your mobile phone to receive a one-time passcode and also learn how to check your Polling Station details.

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## Getting started

### Getting Started Video

This video shows how to get started. To play the video, click anywhere on the video tile on the left.

Once you have watched the video, tap **Next** where you will be asked some questions.

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## How to switch on your iPad



### Press the sleep/wake button

When you mount the iPad it will be positioned horizontally (see image on the left).

To turn on the iPad you press and hold the Sleep/Wake button on the top left corner until you see the apple logo displayed on the screen.

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## Check your iPad battery level



### iPad should be 100% charged

On the top right of the screen you will see how much your iPad is charged, it should be 100%. It is advisable to keep it plugged in all day to keep it at 100%.

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# How to open the Modern Polling app

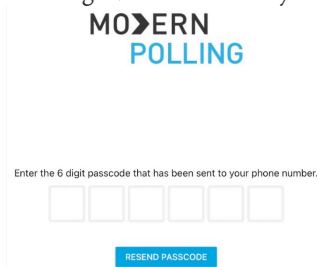
When you log into the iPad you will see the Modern Democracy logo. To open Modern Polling tap on the Modern Polling app icon (M>). It will launch the Login screen.



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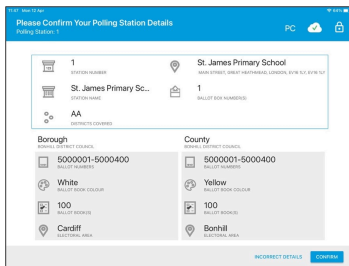
## Receiving your one-time passcode

When you enter your SMS mobile phone number you receive a 6-digit one-time passcode (OTP). If you do not receive it, check your phone network as you need this to receive messages. Once entered you tap **CONFIRM**.

The image shows a login screen for the Modern Polling app. At the top, the logo "MODERN POLLING" is displayed, with "MODERN" in black and "POLLING" in blue. Below the logo, there is a text prompt: "Enter the 6 digit passcode that has been sent to your phone number." Underneath this prompt are six empty square input boxes for the passcode. At the bottom center, there is a blue button with the text "RESEND PASSCODE" in white.



# Checking your polling station details



When your Polling Station Details are displayed, you will see the Polling Station Name, Number, District, Ballot Box Number and District covered.

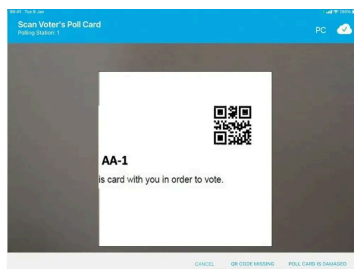
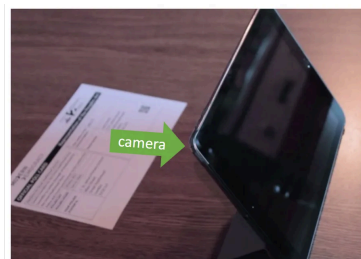
You will also see the ballot details for each contest.

Once you are happy the details are correct, tap **CONFIRM** at the bottom of the screen.

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End of Section 2

# How to scan the QR code



## 1. Position the Poll Card

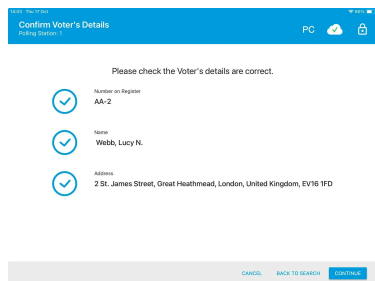
Position the Poll Card to the rear of the iPad, by the camera.

## 2. Scan the QR Code

The QR code appears on the screen and scans automatically. Take your time.

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# When you scan the Voter's Poll card their details are displayed on screen



Once scanned the voter details will be displayed on screen. You need to confirm their:

- Name
- Address

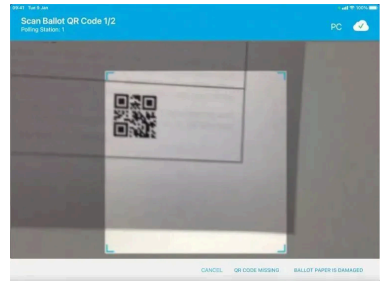
Then tap **CONTINUE**.

# Scanning a ballot

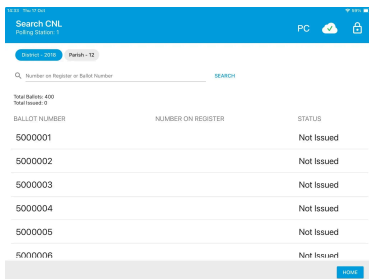
## Scanning a ballot

Once you confirm the ballot(s) that the voter is about to receive, you tap CONTINUE TO BALLOT(S). This launches the camera to scan the ballot you are about to hand out.

It is important that you do not have any other QR codes (e.g. Poll Card) in the view of the camera because it they will be scanned instead of the ballot.



## Checking the CNL



To check a voter has been recorded successfully, you can filter the CNL by entering their:

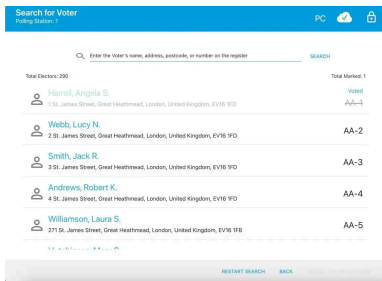
- Number on Register or
- Ballot Number

Then tap **SEARCH**.

# Voter arrives without a Poll Card

**Learning objective:** Learn how to use Modern Polling when a voter arrives without a poll card. Search for the voter, scan the ballot(s) and hand them to the voter.

## Search the Register to find a Voter's details



To find a voter you can enter any/all of the following:

- Voter's Name
- Address
- Postcode
- Number on the Register

## Additional Scenarios

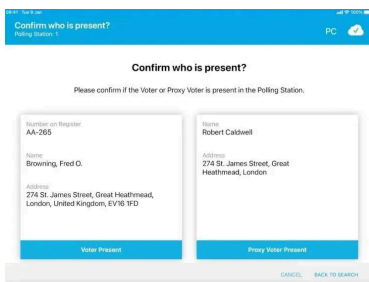
**Learning objective:** Learn how to use Modern Polling if a proxy or postal voter arrive at the polling station or if a voter arrives at the wrong station. Also, what to do if a poll card is damaged and finally, what to do if a voter spoils a ballot paper.

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## Additional Scenarios

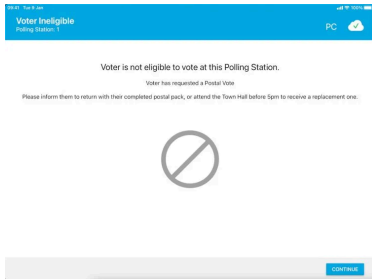
- Scanning the Poll Card for a Proxy
- Proxy arrives without a Poll Card
- Voter arrives at the wrong station
- Postal Voter arrives at the polling station
- Voter Spoils a Ballot
- Viewing the CNL

## Proxy Arrives with a Poll Card



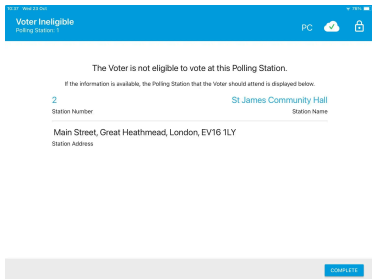
When a proxy voter arrives at the polling station with their poll card, you scan it as you would a normal poll card, the only difference being.. you need to confirm if it's the Proxy Voter or Voter that is present in the polling station.

# Postal Voter Arrives with a Poll Card



- When a postal voter arrives at the polling station with their poll card, you scan it as you would a normal poll card and confirm their details, however, as you proceed you will be informed that the voter has registered to vote by post.
- Do not Issue Ballot Paper(s)

# Voter Arrives with Poll Card to the Wrong Station



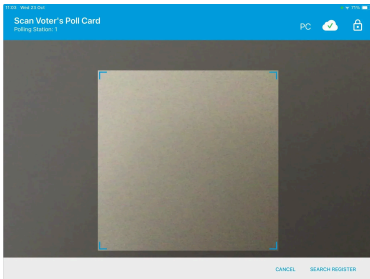
When a voter arrives at the wrong station either:

- with a poll card - scan as normal
- or without a poll card - search the register and if not found at your polling station you need to search the Full Register.

If registered and found on the register, the polling station they should attend is displayed.

- Do not Issue Ballot Paper(s)
- Tap COMPLETE

# Damaged QR Code on Poll Card



If you are having issues scanning the QR code on a poll card you can enter it manually.

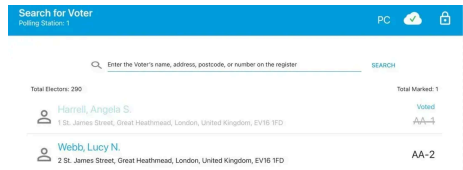
- On the 'Scan Voter's Poll Card' screen, navigate to the bottom right of the screen.
- Tap SEARCH REGISTER.

## Damaged QR Code on Poll Card - search for voter

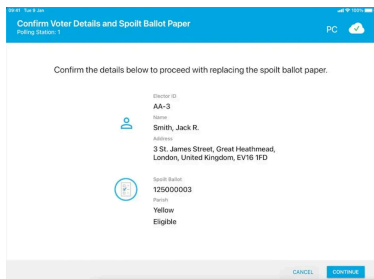
When you tap SEARCH REGISTER the Search for Voter screen is then displayed:

You can search by entering any of the following information on the Voter:

- Name
- Address
- Postcode
- Number on Register (e.g. AA-1)



# Voter Spoils a ballot paper



If a voter returns with a spoilt ballot paper, you need to replace it with a new one. This needs to be recorded on the Modern Polling app.

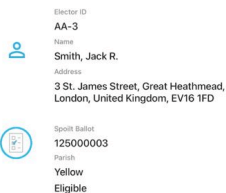
- On the home screen, tap **SPOILT BALLOT** on the bottom left of the screen.
- You will then follow the steps to ensure you replace the ballot, placing the spoilt ballot in an envelope.

## Confirming the Spoilt Ballot details

When you scan the spoilt ballot, the details for that **ballot** and the **voter** it was issued to are displayed.

It is important to check the spoilt ballot details on screen match the spoilt ballot paper and the voter it was issued to.

Confirm the details below to proceed with replacing the spoilt ballot paper.





## iPad Distribution Process (to Presiding Officers)

**Learning objective:** There are a number of checks to be carried out when you collect your iPad and on the morning of your election.

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### iPad Distribution

One of the most important aspects of the Modern Polling pre-election preparation is the iPad distribution process by Presiding Officers which we anticipate will happen when the ballot boxes are being collected in advance of the election.

**It is vital that the PO logs into the Modern Polling app on the iPads(s) with the Mobile Number that will be used on Election Day**, as this is the only time that you will be able to check that the Presiding Officer can access the register.

iPads do not have to be assigned to specific Polling Stations. The register downloaded is determined by which Staff member has logged in, so any iPad will work at any Polling Station.

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### Checks to perform when you collect your iPad

As a Presiding Officer, please ensure you **follow the steps below** when collecting the iPad. You will be able to log in offline on Election Day, even if there are connectivity issues. You can continue to process voters offline and when connectivity is restored the data will be synced automatically.

# iPAD COLLECTION

1



## LOG IN

Click on the **Modern Polling App** icon and log into the Modern Polling App.

2



## CONFIRM POLLING STATION

Confirm the **Polling Station Details** AND the **Ballot Paper Range(s)**.

3



## CONFIRM TOTAL ELECTORS

Tap on **Search Register** on the home screen, check all electors have loaded. ALSO check you can search for an elector AND check the number of Total Ballots, tap **View CNL**.

4



## LOG OUT

Tap on the **Lock icon** on the top right of the screen, then tap **YES** on the 'Are you sure you want to log out?' dialog.

5



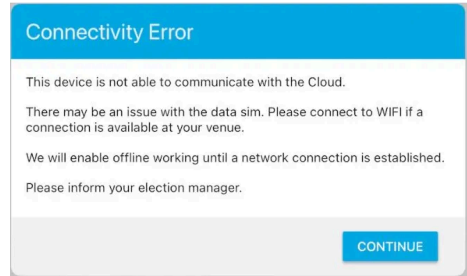
## QUIT THE APP

You **MUST** quit the app after logging out. Press the **'home'** button on the iPad twice and **slide the Modern Polling App up** and off the screen.

# Election morning - no internet connectivity

When you arrive at your polling station on election morning:

- **Open the Modern Polling app.**
- **If you do not have internet connectivity** you will be notified (if you followed the 5 checks when collecting your iPad).
- Tap **CONTINUE**.
- **DO NOT LOGOUT.**
- **Continue using the app offline** and process voters until connectivity can be established.
- **Alert your Election Manager** so that they know you are using the app offline.



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# Election morning - you have internet connectivity



In order for the Poll Clerk (PO) to log into the Modern Polling app on election morning, they need an internet connection. All iPads have been set up with SIMs in advance and should have a 4G internet connection.

Check this on the top right of the iPad home screen. Once confirmed, get the Poll Clerk to open the Modern Polling App and log in.

## Searching for a Voter

**Learning objective:** Learn how to use Modern Polling when a voter arrives without a poll card. Search for the voter, scan the ballot(s) and hand them to the voter.

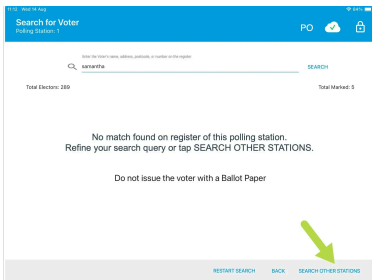
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### The Presiding Officer's role

The Presiding Officer (PO) can perform the same tasks as a Poll Clerk. The primary role for the PO is to submit the Ballot Paper Account (BPA) at close of poll. To do this the data must be synced (green tick) and they must have internet connectivity.

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### Searching for a voter at the wrong station



When a voter arrives to the polling station and you cannot find them at that polling station when you perform a Search, you will get the following message:

"No match found on register for this polling station. Refine your search query or tap SEARCH OTHER STATIONS. Do not issue the voter with a ballot paper".

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# A PO will see all of the details for a voter at a wrong station

22 Station Road, London, United Kingdom, EV16 1JU, EV16 1JU <small>Registered Address</small>		
Unknown <small>Date of Birth</small>	British <small>Nationality</small>	Unknown <small>Date of Attainment</small>
<b>Proxy Voter Details</b>		
Not Applicable <small>Proxy Voter Name</small>		
Not Applicable <small>Proxy Voter Address</small>		
<b>Election Details</b>		
PCC, Borough, County <small>Electoral Area</small>		
No Absent Vote <small>Vote Type</small>	- <small>Electoral Flags</small>	No <small>Anonymous Status</small>
<b>Polling Station Details</b>		
2 <small>Station Number</small>	St James Community Hall <small>Station Name</small>	
Main Street, Great Heathmead, London, EV16 1LY <small>Station Address</small>		

When you search other stations and find the voter, you are presented with a detailed view of that voter (the poll clerk will only see the polling station the voter should attend). You will see:

- General - their address, nationality, DOB and date of attainment (if applicable)
- Proxy Voter Details - if applicable
- Election Details - eligible franchises, elector flags and if they are anonymous
- Polling Station Details - number, address and name - where they should attend.

## Submitting the Ballot Paper Account(s)

**Learning objective:** Learn how to submit the Ballot Paper Account(s) at close of poll

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### Submitting your Ballot Paper Account(s)



At close of Poll you, the Presiding Officer are responsible for submitting the Ballot Paper Account(s).

Tap View BPA and your digital ballot paper account(s) are displayed for you to review and submit.

**Note:** the **data must be synced** (a green tick) for you to successfully submit the BPA.

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## What to do if your data has not synced at close of poll

If you do not have connectivity at close of poll you will be unable to submit the Ballot Paper Account(s) in the Polling Station you are advised to do the following:

- Alert your Election Manager
- Take the iPad to your Election centre and retry to connect to the internet to sync the data on the iPad and submit the Ballot Paper Account(s) for your polling station(s).
- In the event that you are unable to submit the Ballot Paper Account(s), you need to place a label on the iPad for isolation so that your Election Manager can submit the Ballot Paper Account(s) on your behalf.

# Troubleshooting

**Learning objective:** Learn how to use Modern Polling if a proxy or postal voter arrive.

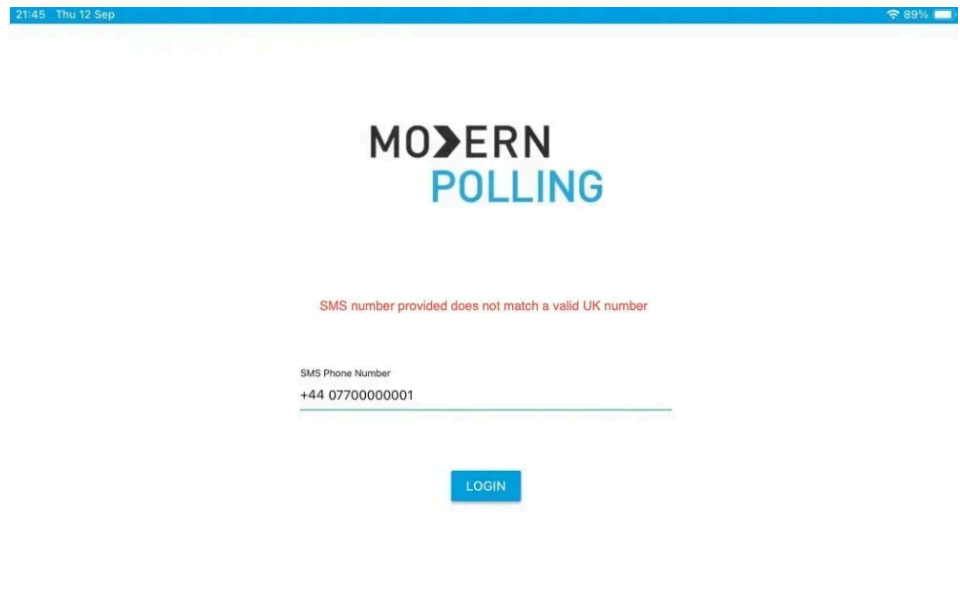
What to do if a voter arrives at the wrong station and what to do if a poll card is damaged. Finally, what to do if a voter spoils a ballot paper.

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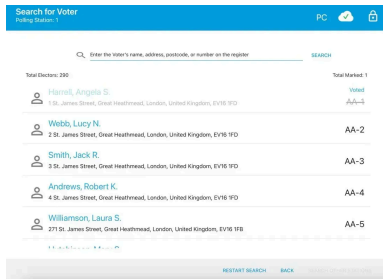
## Unable to log in with your mobile number

If you have internet connectivity on the iPad and network on your mobile phone and cannot log in contact your election manager to ensure your mobile number has been added to the system.

If your number is not on the Modern Polling system, the following message is displayed: 'SMS number provided does not match a valid UK number'



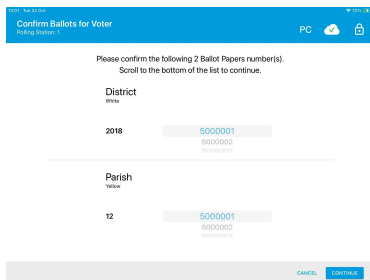
# When you don't scan the qr code on the Poll Card within the timeframe



When you select Poll Card from the home screen, the camera is enabled to scan the QR code on the Poll Card. If after **20 seconds** you do not scan it, you are redirected to the **Search Register** (Search for Voter) screen.

If you want to scan the poll card, tap **BACK** and select the **Poll Card** option from the home screen.

# When the qr code on the ballot paper is damaged



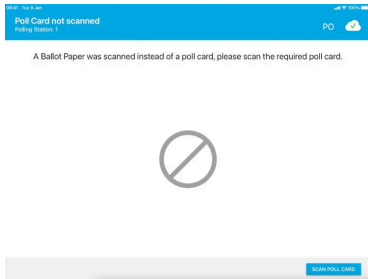
On the Scan ballot screen, tap **BALLOT PAPER IS DAMAGED**. This will then display the 'select' ballot(s) screen (see image on the left).

The Election name and UIM are displayed, along with the next ballot in sequence (highlighted in blue).

Check this is correct before tapping **CONTINUE** which will take you to the 'Confirm Ballot Paper Number(s)' screen.



## Scanned a qr code on ballot paper, instead of the qr code on the poll card



When scanning QR codes, the camera is very sensitive and will scan any QR code if in range of the camera. That's why it's important to keep the area behind the camera clear while your scan.

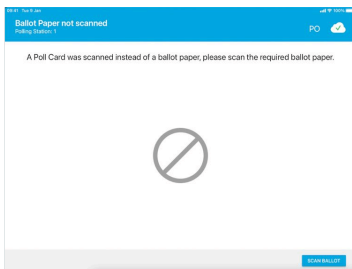
If you accidentally scan a ballot instead of a poll card you will see the screen on the left.

Tap **SCAN POLL CARD** will bring you back.

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## Scanned a qr code on poll card, instead of the qr code on the ballot paper

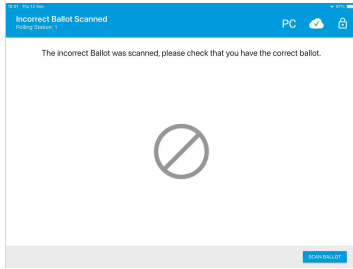
If you accidentally scan a poll card instead of a ballot paper you will see the screen on the right. Tap **SCAN BALLOT** will bring you back.



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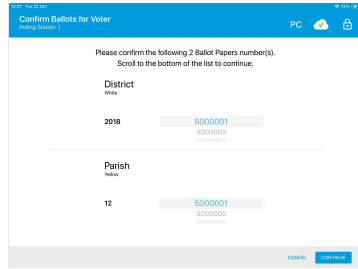
## QR code on ballot paper did not scan correctly – select ballot screen displayed

If you scan a ballot that does not match the ballot range for your polling station in modern polling, you will get either of the following messages.



## Incorrect Ballot Scanned

The incorrect Ballot was scanned, please check that you have the correct ballot. Then tap 'SCAN BALLOT' to scan the correct ballot. If the problem persists, contact your Election Manager for guidance.

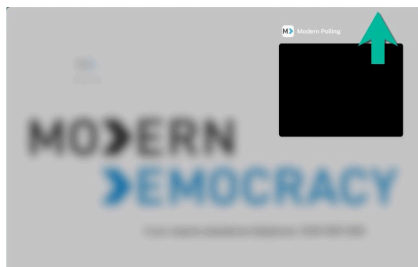


## Select screen (Confirm Ballots for Voter)

If the select screen is displayed, it means the QR code on the ballot is incorrect for the polling station. Do not continue, check your ballot book(s) to ensure they are correct for your polling station. Failing that, check that you are assigned to the correct polling station in the Modern Polling App. If you are unable to resolve, contact your Election Manager for guidance.

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# If you are having problems with the app



If for any reason you are having problems with the app:

- app freezes
- slows down

Dismiss/Quit the app, by pressing the home button twice (round recessed button on the iPad).

You will see a preview of your app, which you then swipe up to quit the app. Once you have done this, open the app again.

If this does not resolve it, log out and back in **ONLY if you have internet connectivity**.

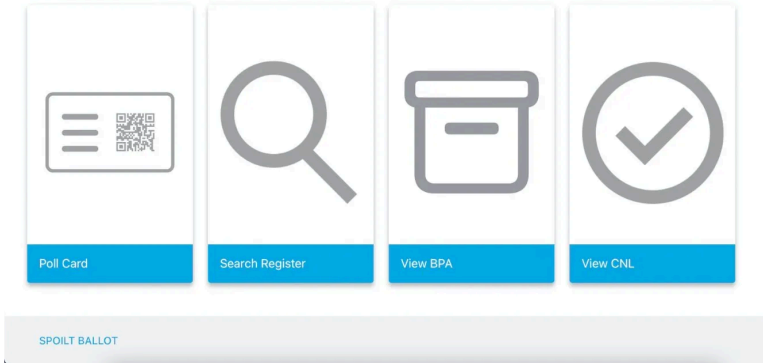
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## Sync issues with the app

- If this occurs, request that the station **continue to process using modern polling**.
- Ask the PO/PC to take the iPad outside or move around the room to see if they can get signal to sync any records that are unsynced. If there is **no** Connectivity – **DO NOT LOG OUT**
- Ensure secure Wi-Fi (not public) and mobile data are enabled, or hotspot to a mobile phone. (*Refer back to HOW TO CHECK WIFI, MOBILE*)
- If there is internet connectivity ask the PO/PC to log out of the app and back in to trigger a heartbeat update, refresh their token. Has this solved the issue, If Yes continue to process voters
- If No, Request that a contingency iPad is sent to the poll station, do not log out of the iPad until the replacement has arrived and you are logged in, Ask that the PO to attach a note to the iPad stating that it had sync issues and there is still records on the iPad.
- Election Manager should contact Modern Democracy to raise this



Please select one of the following options:



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## The REPORT ISSUE button

If you see the 'REPORT ISSUE' button there is no need to panic, it is displayed in scenarios whereby a Presiding Officer needs to be informed. For example, if a Poll Clerk tapped on a voter who had already voted, a message would be displayed stating that the voter has already voted and the REPORT ISSUE button displayed. Tapping on it will direct you back to the home screen.

# Voter Already Voted

Polling Station: 1

EM



Voter has already voted.

Please report this issue for further investigation.



REPORT ISSUE

End of Section 9

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