VERIS RFP Project
Site Visit and Interview Notes

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General Information

Topic: Election Management

Election management

Candidate management

For the GRs, this topic is really the starting point for election management from their perspective. People come into the office to submit these forms to run for local offices:

- Statement of Organization – candidate finance statement
- Certificate of Candidate Qualification – "Q-Form"
- Statement of Economic Interest – financial information
    - Second Statement of Economic Interest
- Declaration of candidacy – filed with first batch of petitions
- Exemption form
- Form 527 – party certification of primary candidates
- Nomination form 511 – triggers the VERIS process once this form is completed and turned in
- Withdrawal forms

The GRs tell all candidates to look at the candidate bulletin for the upcoming election which tells the candidates which documents are required. The GRs are required to verify the candidate bulletin from ELECT and submit changes where needed. Since this document is crucial to the candidates, the GRs would like ELECT to make sure the candidate bulletin is accurate when it's first published.

The specific office requirements determine where the candidate should file specific documents. For example, if a candidate is running for a state office, the Statement of Economic Interest is required to be turned into ELECT. If the candidate is running for a local office, they submit the Statement of Economic Interest to the local GR office. The documents are stamped as "received" and a copy is provided to the candidate. The documents are then scanned—this happens outside of VERIS' scanning process as VERIS is unable to store candidate documents—and placed on a shared drive. These documents must be available for public inspection, which can be printed or emailed to a requestor.

Once the candidate has submitted the requisite forms, the process moves into VERIS. In many cases, candidates have run for offices in the past and simply need to be duplicated for a new election. Instead of searching for an existing candidate, GRs have created a process to search for the voter, first, and then look for the candidate. Not only does this process eliminate the issue of duplicating the wrong candidate (i.e. potentially a person with the same name), but it also ensures that the candidate is eligible to run for

the office. One important note is that candidates are not linked to their voter records. A voter's change in residential address will not reflect in their candidate record.

Unlike voters, candidates are not first-class entities within VERIS. Each candidate is connected to an election and unique to that election, so the candidate information needs to be duplicated and copied to each new election. This first-class entity issue also prevents scanned documents from being attached to the candidate records. The GRs would like similar scanning and document management functionality to be added to candidates. This is helpful for constitutional offices (e.g. Sherriff), especially when the offices cross locality boundaries. For these constitutional offices, the GR's office that sets up the master petition takes on the responsibility of verifying all petition management responsibilities (e.g. verifying signatures), even for voters outside their own jurisdiction. Other GR's can also assist as appropriate.

Paper-based processes

Much of the initial candidate filing process is paper-based. If a potential candidate walks into a GR's office, the GRs show them the candidate bulletin and asks what office for which they're running. The GR then needs to check whether the candidate is qualified, which is the first time the process touches VERIS. The GR asks for ID to look up the voter in VERIS, which ensures they're a registered voter and their registration is up-to-date. If the registration record needs to be updated (e.g. reflect a new address), the GR does it at this point. The candidate submits the required forms. The GR checks the "Name on Ballot" requirements against the voter's name. The GR also checks whether the forms are notarized, which they can do in some GR offices. The candidate receives a filing receipt, which indicates many of the steps they just completed.

Candidates and parties

The Party Certification of Non-Primary Candidate, or 511, form is a state form that the party fills out to tell the GR if the candidate is certified by the party and through which nomination method (e.g. party canvass). The GRs feel they need a better way to track forms submitted to parties—such as through an extranet portal—and vice-versa.

Setting up a candidate

The GRs first conduct a search for the candidate. Before adding a candidate, VERIS requires the GRs to enter a filing date. The GRs believe there should be clear definitions for various dates related to candidates. The filing date is typically defined as the date when a candidate submits the qualifying petition signatures; however, not all offices require petitions, so the filing date shouldn't be linked to petitions. Since the filing date could potentially modify the candidate's position on the ballot, the filing date has to be correct and potentially assigned by the system. For an office without petition requirements, the filing date is the date the Declaration of Candidacy form was submitted. For this same office, the qualification date is the date all required forms are submitted and validated.

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Even with all the discussion about the definitions of candidate dates, the GRs would like to set up a candidate without having a specific form in order to front-load some of the work. As the candidate turns in the required documents, the GRs can simply record when the documents were received on the existing candidate record.

Dual Primaries

Managing dual primaries is a painful process. The GRs have to do everything twice as it involves setting up two elections. The GRs would like a different way to set up and maintain a dual primary. There is significant potential for error with all of the manual processing. The GRs have made errors in the past and create additional manual processes to try and locate errors since VERIS is unable to check. VERIS having built-in support for dual primaries and additional validation is necessary for the future system.

GIS

Some GRs feel they are supported by their county and enjoy a very collaborative relationship between their office and the GIS agency.

Legal requirements

The GRs feel the state election laws are very confusing and convoluted. One GR said, "Our election law hasn't changed much since the revolution."

Data integrity

Some GRs noted that there are serious data integrity issues within VERIS. Some reports that should be snapshots in time after an election are actually calculated from current data. For example, voter address changes that result in transfers in to or out of a locality will affect historical reports within VERIS. If a voter moves after an election to another locality, some of the historical reports from that election become inaccurate (e.g. turnout, ballots).

Absentee

Federal write-in absentee ballot (FWAB)

Accepting a FWAB in VERIS cancels the existing FPCA, which, depending on timing, would prevent any other ballots from being sent out before the original FPCA expires. The GRs have to re-activate the original FPCA by manually re-entering the information so the voter continues to receive ballots for the duration of the original FPCA. The GRs would like for VERIS not to supersede existing FPCAs with FWABs. VERIS should provide separate functionality to handle FWABs instead of a simple category dropdown

under "Absentee Type." No locality handles FWABs the same way. The Absentee Working Group, a group consisting of ELECT staff and GRs from across the state, identified this as a common pain point.

Federal postcard application (FPCA)

FPCAs arbitrarily land in the OVR Hopper as well as the OAB Hopper. The GRs feel the FPCAs should be omitted from the OVR Hopper as they must be handled differently.

Addressing

If an FPCA lands in the OVR Hopper, the "printed" form—the printed version of the electronic record—fails to match the information provided. The voter is prevented from putting an international address in the "mailing address" field, which is sometimes different from "ballot mailing address."

Add vs Create Application

There are options to add an application and create an application for absentee voters in VERIS. However, only the "add application" function works. The "create application" option is unusable. The GRs have no idea why it exists and believe it should be removed from the system.

Ballot processing

Pre-processing a ballot is an optional activity that can be done to make the election process easier. For the ballots that come back in, the GRs perform the following process:

1. Open envelope;
2. Validate ballot, which involves looking at the ballot envelope for the required information and validating the voter;
3. Look in pollbook and check in voter;
4. Scan ballot & put it back in envelope; then,
5. Scan envelope into VERIS and mark it "pre-processed."

On the Absentee Ballot Batch screen, setting the status to "pre-processed" overwrites the ballot received dates to the value of the date field at the top of the page. If the status is pre-processed, the system should keep the existing received date and store an additional pre-processed date.

Poll location management

Pollbook setup

To set up the pollbooks, the pollbooks need an extract from VERIS. Creating a data extract is a bug-ridden process. The data extract link will appear in the VERIS download box before the file is finished

being created, so, if the user clicks on it, it will open a corrupted text file. The user has to constantly refresh the data extract box and know what the approximate size of the file will be before clicking on it.

Petitions

In-person process
When receiving petitions, the GRs:

- Check for notary seal;
- Check the date after last signature date;
- Verify the candidate info;
- Verify the election date; and,
- Verify the circulator.

The GRs would like VERIS to flag the felon status of the circulator as there have been situations where the circulator collected signatures before their rights were restored, which invalidated many of the petition signatures.

Each petition page is checked line-by-line in VERIS. For each line, the GR will look up the voter by social, name, and/or address—which can happen within the petition page—and:

- Check the signature;
- Record the date;
- Check the address matches on sheet and in VERIS;
- Check if the registered address can vote for this candidate; and,
- Record if the signature line is accepted or rejected.

The GRs would appreciate a fully-featured search within the petition screen because, in some cases, the situation requires a lookup by other types of information which is only available in the VERIS voter lookup.

Configuration issues
The GRs number the pages and set up the master petition in VERIS. There are two different size petitions—12- and 21-line pages—and the collector could choose either page size to submit at any time. However, VERIS only allows the page size to be set at the master petition-level, so, if the GRs set the petition page size to be 12 and the circulator submits a 21-line page, VERIS won't accept the page. This causes data issues as the 21-page petition setup would store incorrect blanks for 12-line petition pages.

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Reporting

System resources

Generating reports can be a system-intensive process. If one GR wants a report out of the library, it holds others up if anyone else in the state is trying to pull a report. For a large locality, there is not enough power to provide an alpha roster. For the future state of VERIS, load testing needs to take place during the development and testing processes.

Election night results

Manual entry

Some GRs have to deal with 1200 fields and 11 pages of manual entry. Some GRs rely on Google Sheets to collect information. Each precinct has a Google sheet, which feeds into a master sheet. Once the master sheet is complete, they export the data into as CSV and import the file into VERIS.

There is no process in VERIS to upload Central Absentee Precinct (CAP) results. The GRs can upload a file to cover all of the precincts, but have to manually enter CAP, which, for some large localities, is a substantial amount of work. The GRs feel that VERIS should just treat CAP as another precinct.

ELECT has told the GRs that no one else complains about this process except the large localities. The GRs impression is that ELECT believes there is always going to be hand transcription.

Security

County IT

The people are good, but county policies sometimes get in the way of helping the GRs more (e.g. there are certain systems/devices they won't touch), so it isn't a complete security solution.

The users vs the system

Some GRs think the users are the main security risk, typically due to lack of training or problematic behavior (e.g. clicking links in suspicious emails). Some GRs believe the system is also vulnerable, though they couldn't say exactly why or how.

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General requirements

Process completion verification
When a process is completed, there's no confirmation screen to validate the work done, which necessitates having to redo the search to ensure VERIS actually performed the action they attempted to do (e.g. candidate entry/update).

Poll worker management and poll equipment management
The GRs don't use VERIS for either of these two processes.

Miscellaneous

COMET
After mentioning that other GRs had complained that COMET "doesn't work," the GRs shared that COMET does indeed work, however, there are down periods where they cannot access it. Sometimes, these down periods can last an entire day.