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1. Roles and Responsibilities

- a. Moderator
- b. Assistant to the Moderator (when not present, the Moderator assumes these responsibilities)
- c. Town Clerk
- d. Check-in staff (Wayland citizens recruited by Town Clerk)
- e. Handset Issuance Lead (OTI)
- f. Voter and Visitor Registration Staff (citizens recruited by Town Clerk)
- g. Handset Recovery Staff (Election officials appointed by Town Clerk): posted at building exits
- h. Electronic Voting System Installation staff (OTI)
- i. Handset Return Station staff (Election officials appointed by Town Clerk)
- j. Tech Lead (OTI): operates the Electronic Voting System
- k. Town Meeting Lead (OTI): coordinates all tasks for which OTI is responsible
- l. ELVIS staff
- m. WayCAM staff
- n. Responsible Facilities Manager
- o. Town Administrator

2. Pre-Meeting and Pre-Session Tasks

a. Town Meeting Schedule (Board of Selectmen)

1. OTI requires access to the venue two days prior to Town Meeting as well as the day of Town Meeting
 - a. Day 1: physical setup
 - b. Day 2: system test
2. Avoid starting Town Meeting within 2 days after a holiday weekend

b. Pre-Meeting Training Tasks

1. Develop and record 5-minute “How to Vote Electronically” video if previous version is not usable (ELVIS, WayCAM)
2. Develop “How to Vote Electronically” article for Town Crier, Town Web Site, Town Meeting Warrant (ELVIS)
3. Post videos on Town Web Site and YouTube (ELVIS)
4. Submit “How to Vote Electronically” to Town Crier, Town Web Site, Town Meeting Warrant (ELVIS)
5. Update Voter Handout (ELVIS)
6. Develop a training script for Check-in Staff and Help Desk personnel (OTI)

c. Pre-meeting Provisioning Tasks

1. Forecast Attendance (ELVIS)
2. Choose venue (Town Administrator)
3. Order Handsets and Welcome Stations from Town Meeting Lead (Town Administrator)
4. If multiple rooms will be used, define who decides when Voters should be routed to the “next” room (Town Administrator)
5. Recruit Check-in staff (Town Clerk)
6. Recruit Handset Recovery staff willing to collect Handsets and stay after each Session to sort and store Handsets (Town Clerk)
7. Staff Voter and Visitor Registration Desk (Town Clerk)
8. 20 days prior to the first Annual Town Meeting session (or 10 days prior to the first Special Town Meeting session), send the final Voter Extract to the Town Meeting Lead (Town Clerk)
9. Print Visitor Cards (ELVIS)

d. Pre-Meeting Setup and Testing Tasks

1. Configure Check-in Area (Responsible Facilities Manager)
2. Setup tables
 - a. Two 6’ tables for electronic voting system near Moderator
 - b. One 6’ table for electronic voting servers
 - c. One 8’ table for every two Check-in stations, ideally away from entry doors to prevent backups
 - d. One 6’ table in each room for Handset return
 - e. One 8’ table for Handset sorting
 - f. One 8’ table in each room for Help Desk
 - g. One 6” table for Voter and Visitor Registration Desk
 - h. Two 6” tables for Exit Desks positioned on either side of Field House entrance
3. Install and test Electronic Voting System, including backup components (OTI)
 - a. AC Power (extension cords, multi-outlet sockets, UPS)
 - b. Transceivers
 - c. Voting PC
 - d. Roster Server
 - e. Check-in laptops and scanners
 - f. Handsets (batteries, connectivity, configuration)

- g. Handset containers (Check-in, Recovery)
 4. Test and rehearse primary-to-secondary switchover procedure
 5. Test and rehearse handset owner lookup procedure
 6. Install and test cables and VPN boxes linking rooms (OTI, responsible Facilities Manager)
 7. Disable Wi-Fi in all rooms (ELVIS)
- e. **Pre-Session Setup and Testing Tasks**
1. Restore and test any Electronic Voting System components removed between Sessions (OTI)
 2. Initialize Handset roster (OTI)
 3. Initialize and test Electronic Voting System (OTI)
 - a. Test primary registration server, voting server, base stations, and cables
 - b. Test backup registration server, voting server, base stations, and cables
 - c. Test primary-to-backup switchover procedures
 4. Place Handsets into containers by room (OTI)
 5. Show Checkers how to work with Handset Issuers (OTI)
 6. Deploy Handset Recovery Staff and Handset Recovery Containers (OTI)
 7. Setup a “Manual Counting Section” and assign a 2-person ELVIS Manual Counting team to convey its Ballots (Assistant to the Moderator)
 8. Prepare Identification Cards and Seating Maps for distribution by the Electronic Voting Help Desk for distribution to Manually Counted voters (Assistant to the Moderator)
 9. Prepare paper Ballots and pens for the “Manual Counting Section” and for handset failures, and distribute them to ELVIS Handset Replacement teams (Assistant to the Moderator)
 - a. Ballots should provide separate sections that capture a missing vote (3.c.9.b) and a changed vote (3.c.9.c)
 10. Setup for Random Audits (OTI Town Meeting Lead, Assistant to the Moderator)
 - a. Conduct a test vote with 10 handsets
 - b. Audit each handset’s vote
 11. Remind OTI Town Meeting Lead to clear votes from handsets as soon as a vote is no longer auditable
 12. Place a spectrum analyzer in each room to check for Wi-Fi hot spots (OTI)
 13. Prepare for Handset Failures (OTI Town Meeting Lead, ELVIS)
 - a. Use Welcome System to pre-issue 20 handsets to each Help Desk for use as replacements, using special voter names Help-1. Help-20 (OTI)
 - b. Provide a Replacement Handset List for each Help Desk (OTI)
 - c. Power-down all replacement handsets so they don’t inadvertently generate votes (OTI)
 - d. Distribute pre-issued Replacement Handsets and Replacement Handset Lists to each Help Desk (OTI)
 - e. Provide an empty “failed Handsets” box to each Help Desk (OTI)
 - f. Designate 2-person ELVIS Manual Counting team that will provide ballots to voters in the “Manual Counting Section” and convey them to the Moderator after each vote
 - g. Designate ELVIS Handset Replacement team that will scan for and handle handset failures during votes
 14. Setup and staff Electronic Voting Help Desk (ELVIS)
 - a. Print copies of “How to Vote Electronically” and “Electronic Voting Handout” (Town Clerk)
 15. Identify necessary signage and print signs (ELVIS)
 - a. Help Desk
 - b. Handset Return

3. In-Session Activities

a. Check-in and Handset Issuance, Return from Permanent Departure

1. Guide incoming Voters to any Check-in Station
2. If Voter is inactive, route voter to Voter and Visitor Registration Desk for validation
3. If Voter cannot use a handset, Checker directs voter to the Electronic Voting Help Desk
4. If Voter is joining this Session for the first time,
 - a. enters voter's name
 - b. removes Handset from current room container
 - c. optically scans Barcode on back of Handset into Welcome System
 - d. Checker gives Handset to Voter, says "vote with your own handset only", and directs Voter to appropriate room
 - e. Welcome System adds Handset to Roster and deactivates Voter's previously-issued Handset (if any)
 - f. Route Voters claiming to be physically incapable of using a Handset to Electronic Voting Help Desk
5. If Voter has previously checked in to this Session, Handset Issuer
 - a. enter voter's name
 - b. if Welcome Station indicates Voter's previously-assigned handset has not been Returned, route Voter to Electronic Voting Help Desk; otherwise issue a Handset as described in 3.a.4
6. The Check-in process is suspended from the point where the Moderator announces "Prepare to Vote" until the Moderator announces "We will now tally the vote" so that the Checkers and Election Officials can vote.

b. Voter and Visitor Registration

1. Verify registered but inactive voters
 - a. Verify that voter is registered
 - b. Escort confirmed voter to the Help Desk, which issues a replacement handset (recording the voter's name)
2. Register Visitors
 - a. Issue a visitor card to each visitor (but not to children accompanied by parents)
 - b. Record each visitor's name in the visitor log
 - c. Direct visitors to visitor seating area (children may sit with their parents)

c. Introduction

1. Moderator explains rules governing Electronic Voting
 - a. No proxy voting
2. Moderator points out that
 - a. Handsets with red dots at top only work in the primary room
 - b. Handsets with green dots at top only work in the secondary room (if in use)
 - c. Handsets must be returned at end of each session; handsets not returned won't work in future sessions
3. Moderator explains how to vote: which buttons to push, 30 second voting window, Voting Lamp, and announcements
 - a. "Prepare to vote"
 - b. "Please vote"
 - c. "We will now tally the vote"
4. Moderator explains what to do if Handset fails during voting: raise your hand
5. Moderator conducts a test vote prior to the formal start of the Session

d. Vote

1. Moderator cues Voters, Town Meeting Lead, and Tech Lead that vote is imminent (announce "Prepare to Vote")

2. Town Meeting Lead cues Tech Lead to transfer Voting Roster (unless re-vote), open voting window, and illuminate the Voting Lamp
3. Moderator announces that the voting window is open (announce "Please Vote")
4. Tech Lead extinguishes the Voting Lamp after 30 seconds, and then closes the voting window
5. Town Meeting Lead indicates to the Moderator that the voting window has closed
6. Moderator announces that the voting window is closed (announce "We'll now tally the vote")
7. Town Meeting Lead either reports an Electronic Voting System irregularity (malfunction, attack) to the Moderator, or cues the Tech Lead to display Electronic Voting results on the Moderator's Monitor
8. Tech Lead displays Electronic Voting results on the Moderator's Monitor
9. Help Desk staff assists Voters experiencing Handset Failure
 - a. the Help Desk staff checks the Voter's Handset
 - b. if the Voter's Handset's Display does not indicate a confirmed vote, the Handset Replacement Team provides the Voter with a paper Ballot and pen, and then conveys the Ballot to the Moderator with instructions to increase the count
 - c. if the Voter's Handset's Display indicates a confirmed vote, the Handset Replacement Team provides the Voter with a paper Ballot and pen, and then conveys the Ballot to the Moderator with instructions to increase one count and decrease the other count
 - d. the Help Desk staff takes possession of the failed Handset, powers on a Replacement Handset, and issues it to the Voter, recording Voter's name and Handset ID (e.g. Red 15) on Replacement Handset list
 - e. the Help Desk staff retains the failed Handset
10. The ELVIS team responsible for the "Manual Counting Section" conveys Ballots from Voters in this section to the Moderator
11. The Moderator announces the vote
12. The Moderator either initiates an Audit, or declares the vote to be final
13. Town Meeting Lead cues Tech Lead to print vote results
14. Tech Lead prints vote results
15. Town Meeting Lead conveys printed vote results to the Moderator
16. Town Meeting Lead cues Tech Lead to clear the Voting Database
17. Tech Lead clears Voting Database

e. Audit (optional spot check or triggered by seven voters)

1. The Moderator announces an Audit and explains its purpose and procedure
2. The Moderator selects voters to serve as Auditors
3. The Town Clerk moves to a station next to the Tech Lead
4. Each Auditor presents his or her handset to the Town Clerk for verification
 - a. ELVIS member assists Town Clerk in engaging with Auditors one at a time
 - b. The Town Clerk conveys the handset's number to the Tech Lead
 - c. The Tech Lead causes the handset's received vote to appear on a monitor visible to the Town Clerk
 - d. The Town Clerk reports to the Moderator any discrepancy between the handset's received vote and the vote shown on the handset

f. Possession of Multiple Handsets or Proxy Voting

1. Anyone who observes possession of multiple handsets or proxy voting should either raise a point of privilege or immediately inform a member of ELVIS at the Help Desk
2. An ELVIS member who observes possession of multiple handsets or proxy voting should raise a point of privilege unless the voting window is open, in which case he or she should raise the point of privilege immediately after the voting window closes
3. A Police Officer
 - a. who observes possession of multiple handsets should immediately inform a member of ELVIS at the Help Desk
 - b. who observes proxy voting should immediately inform the Moderator
4. The Moderator
 - a. will recess the Meeting
 - b. will interview the person(s) in possession of multiple handsets
 - c. may ask to determine the names of the residents to whom one or more handsets were issued
 - i. ELVIS member conveys handset numbers to OTI Registration Lead
 - ii. OTI Registration Lead queries system to determine the name to which each handset was issued
 - Could be a handset issued to a previously inactive Voter
 - Could be a replacement handset
 - iii. ELVIS member conveys names to Moderator
 - d. may ask one or more residents to come forward
 - e. will announce his resolution
 - f. will call the Meeting to order
 - g. will initiate a re-vote if the point of privilege was raised immediately after a voting window closed and if the outcome of the vote might have been affected

g. Restrooms

1. Handset Recovery Staff at Exit Desk will if requested hold handsets for voters visiting restrooms

h. Permanent Departure

1. 45 minutes before scheduled end of session, convert two Check-in stations to Check-out stations
2. At close of session, remind voters to return their handsets (Moderator)
3. Handset Recovery Staff collect a Handset or a Visitor Card from each person who leaves before the Session is adjourned
4. Handset Recovery Staff collects returned Handsets from exits every 10 minutes, and conveys them to the Return Station, which removes them from the Voting Roster

4. Post-Session and Post-Meeting Tasks

a. End-of-Session

1. Handset Return Station Staff scans returned Handsets to remove them from Roster
2. Failed Handsets are segregated (OTI)
3. Tech Lead prints list of Voters who failed to return Handsets or Replacement Handsets
4. Electronic Voting Help Desk staff contacts Voters who failed to return Handsets

b. End-of-Meeting

1. Remove Electronic Voting System (OTI)
2. Remove cables linking rooms (OTI, responsible Facilities Manager)

c. Submit Final Report (ELVIS)

5. Contingencies

- a. Power Failure
- b. Non-recoverable Electronic Voting System failure, reported by OTI Town Meeting Lead
 - Revert to voice votes and standing counts
 - Completed votes are not revisited unless Reconsideration is proposed and succeeds
- c. Recoverable Electronic Voting System failure, reported to Moderator by Tech Lead
 - Moderator informs Town Meeting that
 - 5 minutes will be required to switch to the backup system
 - Error messages on handsets should be ignored
 - Tech Lead informs Moderator when Voting System is ready
- d. Electronic Voting System reports it's under attack, reported by OTI Town Meeting Lead
 - Alert a Police officer
 - Revert to voice votes and standing counts
 - Completed votes are not revisited unless Reconsideration is proposed and succeeds
- e. Random Audit yields one or more discrepancies
 - Alert a Police officer
 - Revert to voice votes and standing counts
 - Completed votes are not revisited unless Reconsideration is proposed and succeeds
- f. Loss of connectivity between rooms, as reported by OTI Town Meeting Lead
 - If possible, move voters into one room
 - Employ voice votes in disconnected rooms

- g. A Voter reports that his or her handset has failed
 - Handset Replacement Teller team verifies that voter is seated in the correct room; if not, no action is taken other than sending the Voter to the correct room
 - Teller team checks handset display
 - Teller team collects vote on Ballot
 - Teller team collects defective Handset, powers on and issues Replacement Handset, and records Voter's name on Replacement Handset List
 - Teller team conveys Ballot to Moderator, noting whether to increase one count, or increase one count and decrease the other count
 - the Teller Team gives the failed Handset and Voter name to OTI personnel manning Return Station
- h. A *significant* number of voters claim that the confirmed vote on their handset does not match their vote
 - Moderator initiates a Random Audit
- i. A voter arrives mid-meeting and asks for instructions on how to vote: send to the Electronic Voting Help Desk
- j. A voter who is leaving the building permanently refuses to return his or her handset: alert a Police Officer
- k. Insufficient Handsets: if the underage is small, voters will be seated in the "Manual Counting Section"
- l. On check-in, the Welcome Station indicates that the Voter has already been issued a handset that has not been removed from the Roster
 - If Voter is joining the Session for the first time, do not remove the previously-issued Handset from the Voting Roster, and issue a new Handset per 3.a.2
 - If Voter is re-joining the Session, route the Voter to the Electronic Voting Help Desk

6. Electronic Voting Help Desk

- a. Provide copies of "How to Vote Electronically" and the "Electronic Voting Handout"
- b. Staff 2-person Manual Counting team that will provide ballots to voters in the "Manual Counting Section" and convey them to the Moderator after each vote
- c. Staff Help Desk Handset Replacement Teams that will scan for and handle handset failures during votes
- d. Provide disinfectant wipes (Town Clerk)
- e. Accept returns of Handsets inadvertently taken from previous sessions
- f. Issues an Identification Card and Seating Map to voters who will be Manually Counted, and directs such voters to the Manually Counted Seating Area
- g. Assist returning Voters whose originally assigned Handset has not been removed from the Voting Roster by determining where the Voter deposited his or her handset on exiting, expediting the removal of Handsets in that return location from Voting Roster, and escorting the Voter to the Check-In station to obtain a new Handset

7. Responsibilities by Role

a. Moderator

1. Introduce Electronic Voting

- a. Summarize why Electronic voting is being used
- b. Explain rules governing Electronic Voting, including “no proxy voting”
- c. Points out that
 - i. Handsets with red dots at top only work in the primary room
 - ii. Handsets with green dots at top only work in secondary room (if in use)
 - iii. Handsets must be returned at end of session; handsets not returned won’t work in future sessions
- d. Explain how to vote: which buttons to push, 30 second voting window, Voting Lamp, and announcements:
 - i. “Prepare to vote”
 - ii. “Please vote”
 - iii. “We will now tally the vote”
- e. Explain what to do if Handset fails
- f. Conduct a test vote prior to the formal start of the Session

2. Cue Tech Lead that vote is imminent

3. Announce that the voting window is open

4. Announce that the voting window is closed

5. Declare the vote on the motion before the town meeting

6. Accepts printed vote results

7. Announces a Random Audit

- a. For no particular reason
- b. If a *significant* number of voters claim that the confirmed vote on their handset does not match their vote

8. Alert a police officer if an attack on the Electronic Voting System is reported by the Town Meeting Lead or if a Teller Audit yields discrepancies

9. At close of session, reminds voters to return their handsets

b. Assistant to the Moderator

1. Setup a “Manual Counting Section”

2. Prepare paper Ballots and pens for the “Manual Counting Section” and for handset failures, and distribute them to ELVIS Manual Counting and Handset Replacement teams

3. Prepare Identification Cards and Seating Maps for distribution by the Electronic Voting Help Desk for distribution to Manually Counted voters

4. Setup for Random Audits

c. Town Clerk

1. 20 days prior to the first Session, send the final Voter Extract to the Town Meeting Lead (7 days for Special Town Meeting)

2. Print copies of “How to Vote Electronically” and “Electronic Voting Handout”

3. Recruit Check-In staff

4. Recruit Handset Recovery (Exit Desk) staff

5. Staff Voter and Visitor Registration Desk

6. In an Audit, compares the vote on each Auditor’s handset with the vote received by the Electronic Voting System

d. Town Administrator

1. Choose venue

2. Order Handsets and Welcome Stations from Town Meeting Lead
3. If multiple rooms will be used, specify who decides when Voters should be routed to the “next” room
- e. Check-in staff (Election workers appointed by Town Clerk)
 1. Check-in each registered voter (as described in 3.a.4 and 3.a.5)
 2. If Voter is inactive, route to Voter and Visitor Registration Desk for validation
 3. If Voter cannot use a handset, direct voter to the Electronic Voting Help Desk
 4. Suspends the Check-in process from the point where the Moderator announces “Prepare to Vote” until the Moderator announces “We will now tally the vote” so they can vote.
- f. Handset Issuance Lead (OTI)
 1. Place Handsets into containers by room
 2. Show Checkers how to work with Handset Issuers
- g. Voter and Visitor Registration Staff (Election workers appointed by Town Clerk)
 1. Verify registered but inactive voters, and escort them to the Help Desk (per 3.b.1)
 2. Register Visitors (per 3.b.2)
- h. Handset Recovery Staff (Election workers appointed by Town Clerk): posted at Exit Desks
 1. Deploy Handset Recovery Staff and Handset Recovery Containers
 2. Collect handsets from exiting Voters
 3. Convey collected handsets to Return Station every 10 minutes
 4. Hold handsets for voters visiting restrooms
- i. Handset Return Station Staff (Election workers appointed by Town Clerk)
 1. Accept and quarantine failed handsets
 2. Removed returned handsets from Voting Roster
- j. Electronic Voting System Installation staff (OTI)
 1. Install and test Electronic Voting System, including backup components and primary-backup switchover procedures
 2. Install and test cables and VPN boxes linking Gym, and Auditorium
 3. Restore and test any Electronic Voting System components removed between Sessions
 4. Remove Electronic Voting System
 5. Remove cables linking Gym, Cafeteria, and Auditorium
- k. Tech Lead (OTI): operates the Electronic Voting System
 1. Initialize Handset roster
 2. Initialize Electronic Voting System
 3. Open the voting window
 4. Illuminate Voting Lamp for 30 seconds
 5. Close voting window
 6. Display Electronic Voting results on the Moderator’s monitor
 7. Prints vote results
 8. Clears Voting Database
 9. Displays Auditor handset votes received by the Electronic Voting System to the Town Clerk
 10. Prints list of voters who failed to return Handsets
 11. Informs Moderator of Recoverable and Non-recoverable Voting System Failures
- l. Town Meeting Lead (OTI): coordinates all tasks for which OTI is responsible
 1. Develop a training script for Check-in Staff and Help Desk personnel
 2. Place a spectrum analyzer in each room to check for Wi-Fi hotspots
 3. Setup for Random Audits

4. Prepare a sheet with 10 barcodes for activated voters and give to Help Desk
5. Prepare for handset failures
 1. Use Welcome System to pre-issue two handsets to each Help Desk Handset Replacement Team for use as replacements, using special voter names Help-1 .. Help-4 (OTI)
 2. Provide a Replacement Handset List for each Help Desk Handset Replacement Team (OTI)
 3. Power-down all replacement handsets so they don't inadvertently generate votes (OTI)
 4. Distribute pre-issued Replacement Handsets and Replacement Handset Lists to Help Desk Handset Replacement Teams (OTI)
6. Cue Tech Lead to transfer Voting Roster (unless re-vote), and when complete indicate readiness to Moderator
7. Cue Tech Lead to open the voting window, illuminate Voting Lamp for 30 seconds, and close voting window
8. Indicate to the Moderator that the voting window has closed
9. Report an Electronic Voting System irregularity to the Moderator or cue the Tech Lead to display Electronic Voting results on the Moderator's monitor
10. Cues Tech Lead to print vote results
11. Conveys printed vote results to the Moderator
12. Cues Tech Lead to clear the Voting Database

m. ELVIS staff

1. Develop and record 5-minute "How to Vote Electronically" video
2. Develop "How to Vote Electronically" article for Town Crier, Town Web Site, Town Meeting Warrant
3. Post videos on Town Web Site and YouTube
4. Submit "How to Vote Electronically" to Town Crier, Town Web Site, Town Meeting Warrant
5. Forecast attendance
6. Disable Wi-Fi in all rooms
7. Setup and staff Electronic Voting Help Desk
 - a. Provide copies of "How to Vote Electronically" and the "Electronic Voting Handout"
 - b. Guide incoming Voters to appropriate Checker based on Voter's last name
 - c. Aid Voters requesting assistance, both before and during the meeting
 - d. Provide disinfectant wipes (Town Clerk)
 - e. Record the name of an activated voter on the activated voter barcode sheet, and accompany the voter to the appropriate Check-in station for check-in and handset issuance
 - f. Issue an Identification Card and Seating Map to voters who will be Manually Counted, and direct such voters to the Manually Counted Seating Area
 - g. Assist returning Voters whose originally assigned Handset has not been removed from the Voting Roster by determining where the Voter deposited his or her handset on exiting, expediting the removal of Handsets in that return location from Voting Roster, and escorting the Voter to the Check-In station to obtain a new Handset

8. Staff Help Desk Handset Replacement Teams
 - a. scan for voters claiming handset failure
 - b. verify that voter is in correct room
 - c. determine whether no vote was submitted, or incorrect vote was submitted
 - d. provide voter with ballot
 - e. record voter's name on Replacement Handset list
 - f. provide voter with replacement handset and takes possession of failed handset
 - g. convey Ballot to Moderator
 - h. give failed handset to Handset Return Station staff
9. Identify necessary signage and print signs
10. Submit final report
- n. WayCAM staff
 1. Develop and record 5-minute "How to Vote Electronically" video
- o. Relevant Facilities Manager
 1. Configure Check-in Area
 2. Setup tables required for the Electronic Voting System, Handset return, Handset sorting, and Help Desk(s)
- p. Town Administrator
 1. Order Handsets and Welcome Stations from Town Meeting Lead