



# BADGER BOOK USER MANUAL

Wisconsin Elections Commission  
March 2020

# Badger Book User Manual

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## **Badger Book Introduction**

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In 2017, Wisconsin Elections Commission staff started developing an electronic poll book system to be used in polling place locations in Wisconsin on Election Day. The "Badger Book" is an electronic poll book software that is specific to Wisconsin elections practices and statutes. The Badger Book is the only electronic poll book software created with direct WisVote integration. Badger Books do not use an internet connection.

The Badger Book is primarily used to check in voters, to register voters on Election Day, and to process absentee ballots. The Badger Book maintains the voter number and count independent of election inspector input. Each process was chosen and designed based on feedback provided by clerks and election inspectors from across the state. After Election Day, a data file generated from the Badger Book is used to upload election participation and Election Day Registration information into WisVote.

The Badger Book is currently supported on the HP ElitePOS 141 Point of Sale retail terminal. One Badger Book station includes the main terminal computer with a touch screen for electronic signature capture, a wireless mouse, a wireless keyboard, a barcode scanner, a case of printer paper, and a printer that can either be integrated into the terminal base column or as a stand-alone printer. Additionally, a separate router and USB device must be purchased for each polling place. The router facilitates communication locally between the Badger Book machines. The USB device is used to transfer data between an internet-connected computer to the Badger Book server machine.

## Initial Delivery of Badger Book Devices (from Vendor)

Upon receipt of your equipment, it is important to open all of the boxes and to conduct an inventory to ensure all equipment is received. It is equally as important to test the equipment as soon as possible upon receipt (if this is a municipality's first implementation, it's okay to wait for training with WEC staff to be completed prior to testing equipment). Equipment issues must be reported directly to the third-party vendor for remedy (e.g., missing or broken equipment, etc.) Give ample time before Election Day to remedy any potential hardware issues with the vendor.

## EQUIPMENT DELIVERY CHECKLIST

### Upon Receipt:

- Conduct inventory to ensure all equipment and peripherals were received
  - Badger Book server device(s) and power cord(s)
  - Badger Book non-server device(s) and power cord(s)
  - Router(s) and power cord(s)
  - Keyboard(s)
  - Mouse(mice)
  - Thermal paper
  - USB device
  - UPS (battery backup) device(s)
- If you are missing any hardware, contact PDS support at 1-800-866-6090 or email [ClientCare@pdsit.net](mailto:ClientCare@pdsit.net) immediately

### As Soon As Possible:

- Set up Badger Books for one polling place (only one server and one router can be in use in one space)
  - Order of Operations (see p. 22 of this manual)
  - Download training data from WisVote and install it to the **server** machine (see p. 30 of this manual) and test the following (at a minimum – feel free to test more)
    - Check in a voter on each machine
    - Print a voter slip to ensure printer is successfully printing
    - Configure Badger Book Scanners (see p. 23 of this manual)
    - Search for voters using scanner on each machine
    - Process absentee ballots
  - Power off all machines
- If you have multiple polling places, set up your next set of machines and start the checklist from the beginning
- If you experience any hardware issues (touchscreen not working, keyboard not working, etc.) contact PDS support at 1-800-866-6090 or email [ClientCare@pdsit.net](mailto:ClientCare@pdsit.net)
- If you experience any device connectivity or Badger Book software issues, contact the WEC Help Desk at (608) 261-2028 or email [elections@wi.gov](mailto:elections@wi.gov)

## Badger Book Expectations

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### Badger Book CAN:

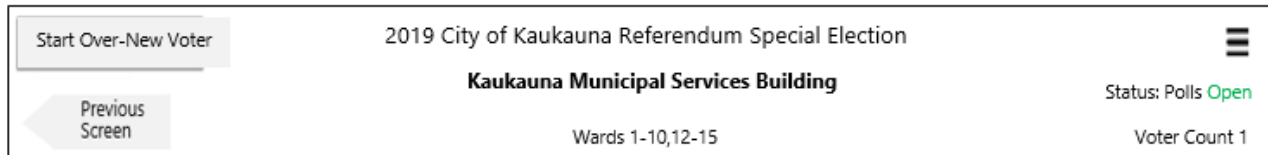
- ✓ Check in a registered voter
  - Record assistor information
  - Record curbside voters
  - Record voters who are unable to sign
  - Record typos in a name or address
- ✓ Check in a confidential voter
- ✓ Provide redirection information for a registered Wisconsin voter who appears at the incorrect polling place
- ✓ Register a new voter
- ✓ Update an existing voter's name or address
- ✓ Register a voter at an address that does not yet exist in WisVote
- ✓ Process absentee ballots

### Badger Book CANNOT:

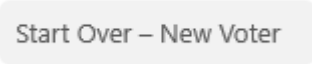
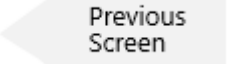
- ✓ Check a voter against the Ineligible Voter List
- ✓ Reject an absentee ballot
- ✓ Create an Election Inspector's Statement (EL-104)
- ✓ Create or track provisional ballots
- ✓ Create or track challenged ballots
- ✓ Automatically district a voter when a new address is added
- ✓ Update voter participation outside reporting units programmed for specific polling locations

## Header Overview

A header will appear at the top of every page with the current election information:





### Far Left – Navigation Tools

Element	Purpose
	Will bring user back to the Voter Check In screen
	Will bring user to the screen before your current screen

### Middle – Election Information

Element	Purpose
2019 City of Kaukauna Referendum Special Election	Name of the election for which the poll book is programmed
<b>Kaukauna Municipal Services Building</b>	Name of the polling place for which the poll book is programmed
Wards 1-10,12-15	List of programmed wards for a specific polling location

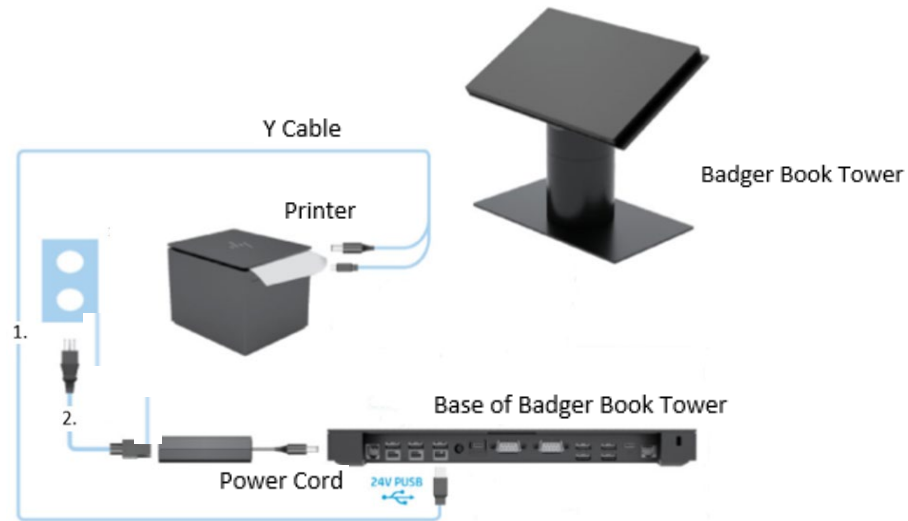
## Far Right – Voter Count and Admin Functions

Element	Purpose
Zoom Font Size  <input data-bbox="662 373 743 405" type="text" value="100"/>	Allows the user to increase or decrease the font size on the screen
	Will take user to the main navigation page where user will have access to absentee processing and Admin features
Voter Count 1	Current voter count for the programmed reporting unit associated with the poll book (if programmed for more than one reporting unit, hover over to cascade a breakdown of voter count per reporting unit)
Status: Polls <b>Closed</b> Status: Polls <b>Open</b>	Shows the current status of the polls, either open or closed (the ability to check in voters or process absentees is only available when the polls are open)

## Hardware Configuration

### Badger Book Set Up and Connecting Stand Alone Printer

#### Set Up:



1. Plug the two-pronged end of the 'Y' cable (Printer 24 V PUSB power and data 'Y' cable) to the back of the printer.
2. Plug in the other end of the 'Y' cable to the 24V PUSB port on the back of the base of the Badger Book tower.
3. Connect the Power Cord (Advanced I/O connectivity base 180 W AC power adapter cord) from the back of the Badger Book Tower base, to a power source (i.e. out on wall or power strip).

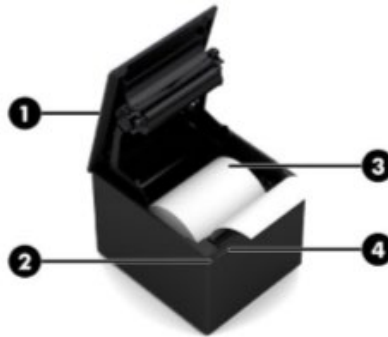
#### Connecting ID Scanner:



Connect the scanner's USB cord to any of the USB ports on the back of the Badger Book Tower's base.



## Printer Components:



1. Receipt Cover  
Snaps open so that you can easily drop the paper roll in place.
2. Status LED  
On: The printer is on and operating normally.  
Blinking: The printer needs operator assistance. It is most likely caused by the cover not being completely closed.
3. Printer Paper  
Prints using thermal print technology.
4. Paper Feed Button  
During normal use, the button advances the paper. If the energy-saving feature is enabled and the printer has entered the energy-saving mode, pressing the paper feed button exits energy-saving mode and re-enables printing.

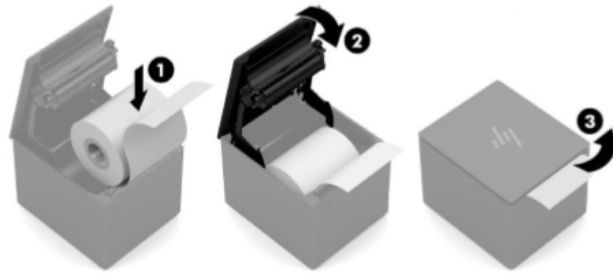
## Loading or Changing the Paper:

Loading the Paper:



1. Open the printer cover by pushing up evenly on each side of the cover (1).
2. Tear a clean edge on the new paper roll, making sure the tape has been completely removed.
3. Place the receipt paper into the paper compartment so it unrolls from the bottom. Leave a few inches of paper sticking out of the printer (2).
4. While holding the paper in place, close the receipt cover. To test that the paper is loaded correctly, advance the paper with the paper feed button.
5. Tear the excess paper off against the teeth in the cover.

## Changing the Paper:



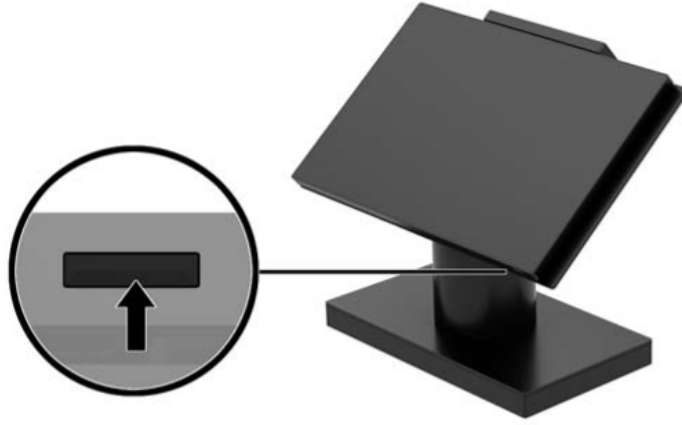
1. Remove the used paper.
2. Tear a clean edge on the new paper roll, making sure the tape has been completely removed.
3. Place the paper into the paper compartment so it unrolls from the bottom (1). Leave a few inches of paper sticking out of the printer.
4. While holding the paper in place, close the receipt cover (2). To test that the paper is loaded correctly, advance the paper with the paper feed button.
5. Tear the excess paper off against the blade in the cover (3).

## Solving Common Printer Problems:

Problem	Possible Cause	Solution
Green LED, quick steady flashing	<ul style="list-style-type: none"> <li>- Paper is out, or</li> <li>- Receipt cover is open</li> <li>- There is a problem with the printer</li> </ul>	<ul style="list-style-type: none"> <li>- Load a new paper roll</li> <li>- Close the cover</li> <li>- Stop using the printer and contact WEC Help Desk; distribute hand written voter number slips in the meantime</li> </ul>
Printer beeps (two-tone – low frequency, high frequency)	<ul style="list-style-type: none"> <li>- Printer has been turned on and is ready to operate</li> </ul>	<ul style="list-style-type: none"> <li>- No action is required</li> </ul>
Printer beeps and flashes green LED in various combinations	<ul style="list-style-type: none"> <li>- Indicates a serious condition</li> </ul>	<ul style="list-style-type: none"> <li>- Stop using the printer and contact WEC Help Desk; distribute hand written voter number slips in the meantime</li> </ul>
Colored stripe is on the receipt	<ul style="list-style-type: none"> <li>- Paper is low</li> </ul>	<ul style="list-style-type: none"> <li>- Change the paper roll</li> </ul>
Receipt does not come out all the way	<ul style="list-style-type: none"> <li>- Paper is jammed</li> </ul>	<ul style="list-style-type: none"> <li>- Open the receipt cover and clear the jammed paper</li> </ul>
Printer starts to print, but stops while the receipt is being printed	<ul style="list-style-type: none"> <li>- Paper is jammed</li> </ul>	<ul style="list-style-type: none"> <li>- Open the receipt cover and clear the jammed paper</li> </ul>
Receipt is not cut	<ul style="list-style-type: none"> <li>- Paper is jammed</li> </ul>	<ul style="list-style-type: none"> <li>- Open the receipt cover and clear the jammed paper</li> </ul>

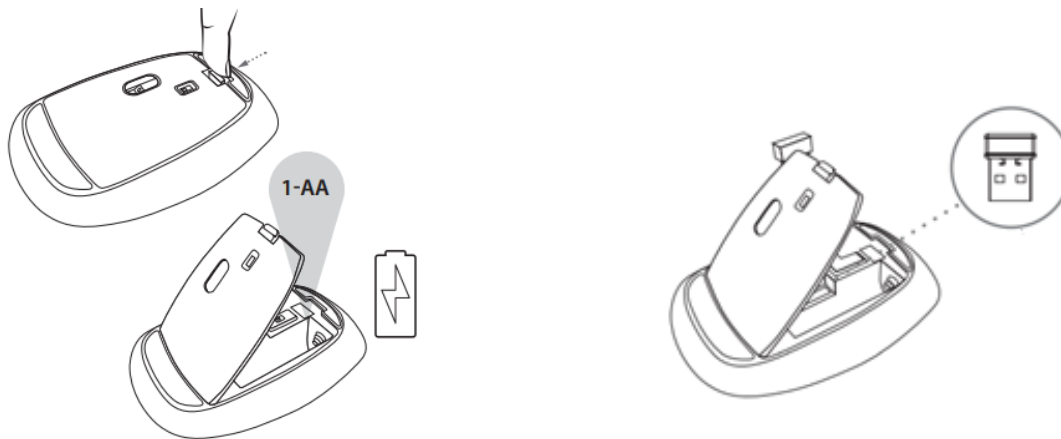
Print is light or spotty	<ul style="list-style-type: none"> <li>- Paper roll is loaded incorrectly</li> </ul>	<ul style="list-style-type: none"> <li>- Check to see if the paper roll is loaded properly</li> </ul>
One side of receipt is missing	<ul style="list-style-type: none"> <li>- Indicates a serious condition with the printer electronics</li> </ul>	<ul style="list-style-type: none"> <li>- Stop using the printer and contact WEC Help Desk; distribute hand written voter number slips in the meantime</li> </ul>
Printer does not function when turned on and LED is off	<ul style="list-style-type: none"> <li>- The printer is not plugged in</li> </ul>	<ul style="list-style-type: none"> <li>- Check that printer cables are properly connected at both ends</li> <li>- Check that the Badger Book is turned on</li> </ul>
Printer does not function when turned on and LED is blinking	<ul style="list-style-type: none"> <li>- Receipt cover is not fully closed</li> </ul>	<ul style="list-style-type: none"> <li>- Close and latch the receipt cover</li> </ul>
Printer stops functioning	<ul style="list-style-type: none"> <li>- Printer has overheated, or</li> <li>- Interrupted data signal over USB connection, or</li> <li>- Faulty USB port, or</li> <li>- Printer is in energy savings mode</li> </ul>	<ul style="list-style-type: none"> <li>- Allow printer to cool down</li> <li>- Ensure the standard USB cable is no more than five meters long with no extensions, eliminate hubs</li> <li>- Plug cable into another USB port on the Badger Book</li> <li>- Press paper feed button to revive printer</li> </ul>
Printer goes off-line	<ul style="list-style-type: none"> <li>- USB is not connected properly</li> </ul>	<ul style="list-style-type: none"> <li>- If printer does not auto-recover after 5-20 seconds, reconnect the USB cable, reset the printer, reboot the Badger Book, check that the USB cable is properly connected at both ends</li> </ul>
Printer does not open	<ul style="list-style-type: none"> <li>- Receipt cover is stuck</li> </ul>	<ul style="list-style-type: none"> <li>- Release the latch failsafe located underneath the printer</li> </ul>

## Powering on the Stand-Alone Badger Book:



Press the power button, which is located on the bottom right edge of the Badger Book monitor. A small light will illuminate when Badger Book is powered on.

## Setting up the Wireless Mouse (USB Model):



1. Open the battery compartment on the bottom of the mouse and insert a single AA battery.
2. Remove the USB dongle from inside the mouse and insert it into an open USB port on the Badger Book. This dongle is how the mouse and keyboard communicate with the Badger Book.
3. After replacing the battery cover, turn the power switch on the bottom of the mouse from OFF to ON and your mouse will be ready to use.

It is always a good idea to have backup batteries on hand, in case the original dies.

## Setting up the Wireless Keyboard (USB Model):

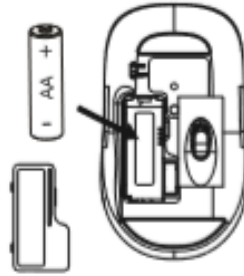
1. Open the battery compartment on the back of the keyboard and insert two AAA batteries.
2. The keyboard does not have its own USB dongle and communicates via the same USB device as the mouse. The keyboard will be ready to use after the mouse has been set up properly.

Because both devices use the same dongle, the keyboard will still function if the mouse loses power or is turned off. As with the mouse, it is important to keep extra batteries on hand in case the originals die.

If you have issues with either device, please contact the WEC Help Desk. In the meantime, please either use the touchscreen functionality of the Badger Book or connect a standard mouse or keyboard to the device.

## Setting up the Wireless Mouse (Bluetooth Model):

Installing the AA battery:



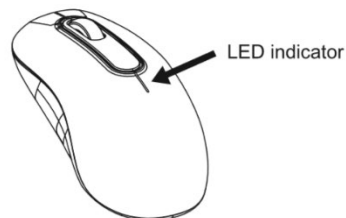
1. Remove the AA battery cover from the back of the mouse.
2. Insert the AA battery, making sure the positive (+) and negative (-) ends match the polarity indicators inside the AA battery housing. It is always a good idea to have a back-up battery on hand, in case original dies.
3. Replace the AA battery cover into position until it clicks firmly into place.

On/Off Switch:

Use the 'ON/OFF' switch to power the mouse on or off. Turn OFF when mouse is not in use to save battery power.

Establishing the Bluetooth Pairing:

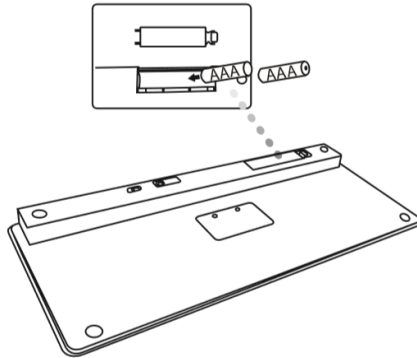
1. Prior to pairing, make sure that the Badger Book is powered on.



2. Turn on the mouse by sliding the power button to the ON position. This should automatically connect the mouse to the Badger Book. If pairing does not automatically occur, contact the WEC Help Desk. A standard mouse with USB cord can be connected to the Badger Book in the meantime.

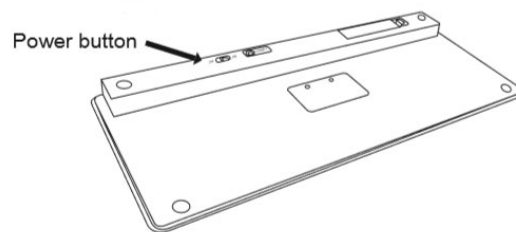
## Setting up the Keyboard (Bluetooth Model):

Installing the AAA batteries:



Remove the AAA battery cover located on the bottom of the keyboard and install the batteries, making sure that the positive (+) and negative (-) ends of each AAA battery match the polarity indicators inside the AAA battery compartment. It is always a good idea to have a pair of back-up batteries on hand, in case originals die.

Establishing the Bluetooth pairing:



1. Turn on the keyboard by sliding the power button to the ON position. Turn OFF when keyboard is not in use to save battery power.
2. The pairing will start automatically, once the red light stops flashing, the keyboard is connected. If pairing does not automatically occur, contact the WEC Help Desk. A standard keyboard with USB cord can be connected to the Badger Book in the meantime.

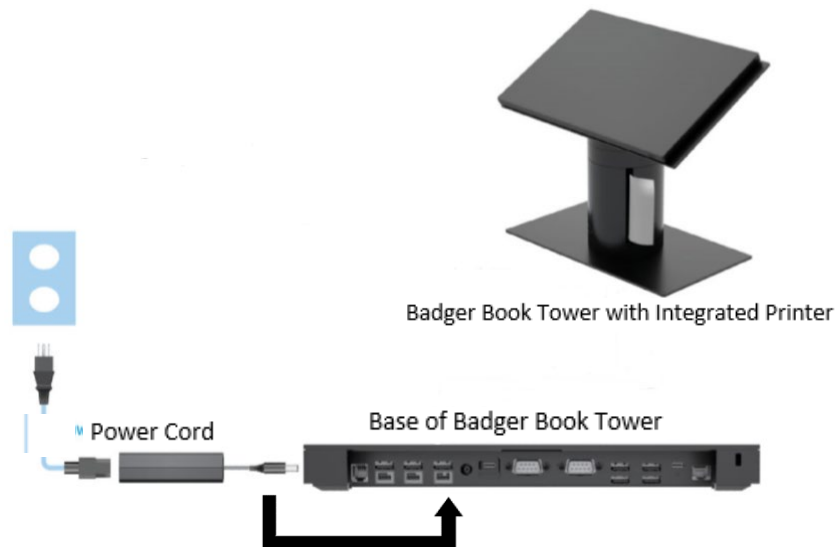
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## Hardware Configuration

### Badger Book Set Up and Connecting Integrated Printer

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#### Set Up:



Connect the Power Cord (Advanced I/O connectivity base 180 W AC power adapter cord) from the back of the Badger Book Tower base, to a power source (i.e. out on wall or power strip).

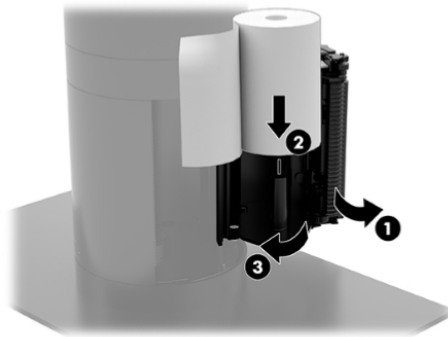
#### Connecting ID Scanner:



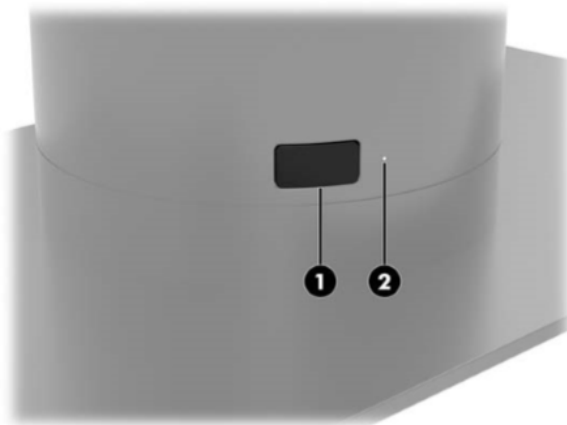
Connect the scanner's USB cable to any of the USB ports on the back of the Badger Book Tower's base.



## Loading the Printer Paper:



1. Open the printer cover by pushing up evenly on each side of the cover (1).
2. Place the receipt paper into the paper compartment on the spindle so that it unrolls from the inside (2). Leave a few inches of paper sticking out of the printer. To prevent jamming, make sure the paper is between the two metal guides.
3. While holding the end of the paper in place, close the cover (3) making sure to apply a little more pressure after the first click to ensure that it is fully latched. When fully latched with paper installed, the LED will stop blinking.

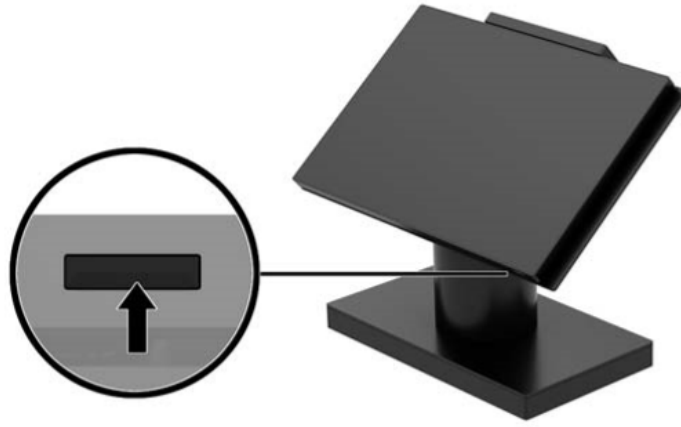


4. To test that the paper is loaded correctly, advance the paper with the paper feed button (1), and then tear the excess paper off against the teeth on the cover. A steady green LED (2) means the printer is on and operating normally. If the LED is flashing, the cover may not be completely closed.

## Solving Common Printer Problems:

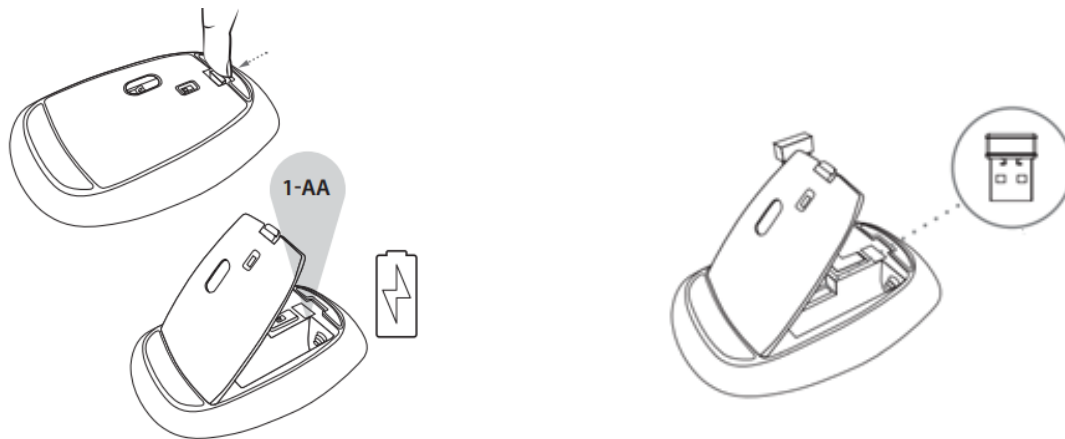
<b>Problem</b>	<b>Possible Cause</b>	<b>Solution</b>
Green LED, quick steady flashing	<ul style="list-style-type: none"> <li>- Paper roll is empty, or</li> <li>- Receipt cover is open, or</li> <li>- The teeth unable to return to the home position</li> </ul>	<ul style="list-style-type: none"> <li>- Change the paper roll</li> <li>- Close the cover</li> <li>- Stop using the printer and contact WEC Help Desk; distribute hand written voter number slips in the meantime</li> </ul>
Green LED, slow steady flashing	<ul style="list-style-type: none"> <li>- There is a problem with the printer</li> </ul>	<ul style="list-style-type: none"> <li>- Stop using the printer and contact WEC Help Desk; distribute hand written voter number slips in the meantime</li> </ul>
Printer beeps (two-tone – low frequency, high frequency)	<ul style="list-style-type: none"> <li>- Printer has been turned on and is ready to operate</li> </ul>	<ul style="list-style-type: none"> <li>- No action is required</li> </ul>
Printer beeps and flashes green LED in various combinations	<ul style="list-style-type: none"> <li>- Indicates serious conditions</li> </ul>	<ul style="list-style-type: none"> <li>- Stop using the printer and contact WEC Help Desk; distribute hand written voter number slip in the meantime</li> </ul>
Colored stripe is on the receipt	<ul style="list-style-type: none"> <li>- Paper is low</li> </ul>	<ul style="list-style-type: none"> <li>- Change the paper roll</li> </ul>
Receipt does not come out all the way	<ul style="list-style-type: none"> <li>- Paper is jammed</li> </ul>	<ul style="list-style-type: none"> <li>- Open the receipt cover and clear the jammed paper</li> </ul>
Printer starts to print, but stops while the receipt is being printed	<ul style="list-style-type: none"> <li>- Paper is jammed</li> </ul>	<ul style="list-style-type: none"> <li>- Open the receipt cover and clear the jammed paper</li> </ul>
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Printer does not function when turned on and LED is off	<ul style="list-style-type: none"> <li>- The printer is not plugged in</li> </ul>	<ul style="list-style-type: none"> <li>- Check that the Badger Book is turned on</li> </ul>
Printer does not function when turned on and LED is blinking	<ul style="list-style-type: none"> <li>- Receipt cover is not fully closed</li> </ul>	<ul style="list-style-type: none"> <li>- Close and latch the receipt cover</li> </ul>
Printer stops functioning	<ul style="list-style-type: none"> <li>- Printer has overheated or</li> <li>- Printer is in energy savings mode</li> </ul>	<ul style="list-style-type: none"> <li>- Allow printer to cool down</li> <li>- Press paper feed button to revive printer</li> </ul>
Printer does not open	<ul style="list-style-type: none"> <li>- Receipt cover is stuck</li> </ul>	<ul style="list-style-type: none"> <li>- Release the latch failsafe by using a thin pointed object and pressing the rectangular button at the top of the printer opening</li> </ul>

## Powering on the Integrated Badger Book:



Press the power button, which is located on the bottom right edge of the Badger Book monitor. A small light will illuminate when Badger Book is powered on.

## Setting up the Wireless Mouse (USB Model):



1. Open the battery compartment on the bottom of the mouse and insert a single AA battery.
2. Remove the USB dongle from inside the mouse and insert it into an open USB port on the Badger Book. This dongle is how the mouse and keyboard communicate with the Badger Book.
3. After replacing the battery cover, turn the power switch on the bottom of the mouse from OFF to ON and your mouse will be ready to use.

It is always a good idea to have backup batteries on hand, in case the original dies.

## Setting up the Wireless Keyboard (USB Model):

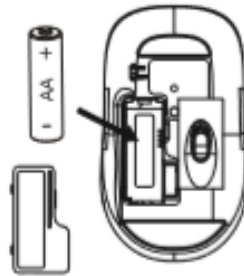
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If you have issues with either device, please contact the WEC Help Desk. In the meantime, please either use the touchscreen functionality of the Badger Book or connect a standard mouse or keyboard to the device.

## Setting up the Wireless Mouse (Bluetooth Model):

Installing the AA battery:



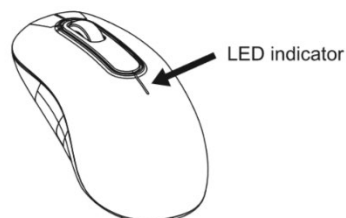
4. Remove the AA battery cover from the back of the mouse.
5. Insert the AA battery, making sure the positive (+) and negative (-) ends match the polarity indicators inside the AA battery housing. It is always a good idea to have a back-up battery on hand, in case original dies.
6. Replace the AA battery cover into position until it clicks firmly into place.

On/Off Switch:

Use the 'ON/OFF' switch to power the mouse on or off. Turn OFF when mouse is not in use to save battery power.

Establishing the Bluetooth Pairing:

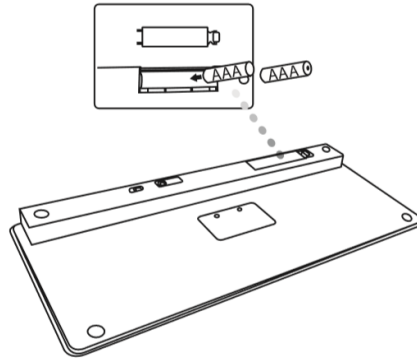
3. Prior to pairing, make sure that the Badger Book is powered on.



4. Turn on the mouse by sliding the power button to the ON position. This should automatically connect the mouse to the Badger Book. If pairing does not automatically occur, contact the WEC Help Desk. A standard mouse with USB cord can be connected to the Badger Book in the meantime.

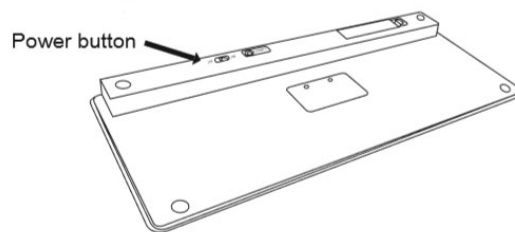
## Setting up the Keyboard (Bluetooth Model):

Installing the AAA batteries:



Remove the AAA battery cover located on the bottom of the keyboard and install the batteries, making sure that the positive (+) and negative (-) ends of each AAA battery match the polarity indicators inside the AAA battery compartment. It is always a good idea to have a pair of back-up batteries on hand, in case originals die.

Establishing the Bluetooth pairing:



3. Turn on the keyboard by sliding the power button to the ON position. Turn OFF when keyboard is not in use to save battery power.
4. The pairing will start automatically, once the red light stops flashing, the keyboard is connected. If pairing does not automatically occur, contact the WEC Help Desk. A standard keyboard with USB cord can be connected to the Badger Book in the meantime.

## Server v. Non-Server

A Badger Book can either be a server or a non-server ("client") machine. Only one server can be active and connected to the EPollBook network at a time. To run the Badger Book software, machines must be connected to the Badger Book router. To access the Badger Book software on the client machines, the server must be "awake" and connected to the router.

---

### Server

- Labeled by a yellow sticker on the corner of the screen
- It is the brain of the operations, communicates with all other non-server Badger Books in the polling place via the router
- WisVote data will be loaded onto this specific Badger Book
- This is also the Badger Book that all voter data is taken from after the polls have closed
- If server is turned off (or falls asleep), non-servers will not be able to run Badger Book software
- This Badger Book should be active and in use on Election Day
- There can only be one server machine in a given space
- Backs up (all) data every 5 minutes (clock starts from the time the Badger Book application is accessed)

### Non-Server

- Receives and sends all information to the server using the router
- Several non-servers can connect to one server
- Backs up (all) data every 5 minutes (clock starts from the time the Badger Book application is accessed)

## Order of Operations

When setting up the Badger Book equipment, it is important the process is completed in a particular order. This will help ensure proper connectivity between the router, server, and non-server machines. Follow these instruction each time the Badger Books are set up (please note that even if you are only using the server device (e.g., loading poll book details), it will be necessary to plug in the router and have it connected to the server.

---

1. Plug in Router
2. Plug in and turn on **SERVER** machine
3. Log into the **SERVER** machine with WINDOWS password
4. Connect to the "EPollBook" Network on the SERVER machine (devices should be programmed to automatically connect to this server upon receipt – verify connection by clicking the WiFi connection icon – should read "**No internet – Secured**")
5. Click on the Badger Book icon, on the **SERVER** machine, to open the application
6. Log into the Badger Book application by entering the Username and Password
  
7. Plug in and turn on client machines
8. Log into the client machines with WINDOWS password
9. Connect to the "EPollBook" Network on each client machine (devices should be programmed to automatically connect to this server upon receipt – verify connection by clicking the WiFi connection icon – should read "**No internet – Secured**")
10. Click on the Badger Book icon to open the application
11. Log into the Badger Book application by entering the Username and Password



## Router

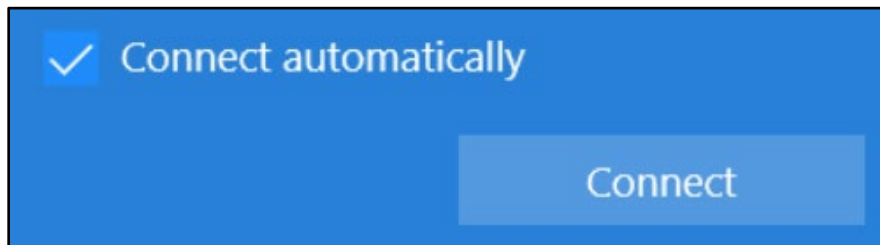
Badger Books communicate through a localized network provided by the Badger Book router. Each non-server must be connected to the router to transmit voter transactions back to the server.

**Upon receipt of devices from the vendor, the server and non-server devices will be programmed to connect to the router automatically.**

To verify the connection, or should the connect be lost, see the following instructions.

### Connect to the Badger Book Network

1. Plug the router power cord into the outlet on the router (consider covering non-power ports with a security label)
2. Plug the router into the wall (a green light should display)
3. Log onto the computer with your Windows password
4. Click the WiFi symbol in the bottom right corner of the screen
5. Click the "EPollBook" network
6. Click "Connect Automatically" (if applicable - should have been programmed by vendor to connect automatically; this will allow the machine to remember the password for the router when it is plugged in at the polling place)



7. Click "Connect"
8. Enter the password if the router does not automatically connect (please contact the WEC for router password)
9. Once connected, it should read "**No internet - secured**"
10. Repeat this process for every Badger Book machine (remember, non-server machines need to be connected to the router to communicate with the server device and to run the Badger Book application)

## Scanner Configuration

Upon receipt, each Badger Book Scanner will require individual configuration. This step should only need to be done one time (scanner should remember); however, it is possible to have to configure a scanner more than one time.

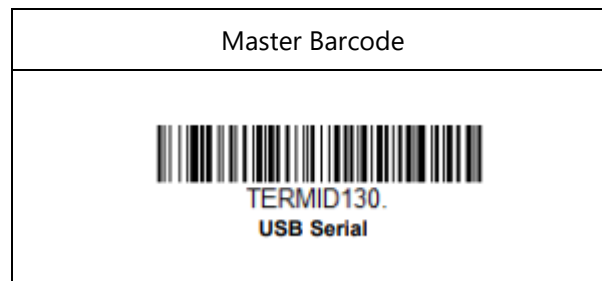
Turn on the device and log into the machine with the Windows password. Then scan the barcode (do not need to be logged into the Badger Book application to program scanner).

### HP ElitePOS 2D Barcode Scanner

This configuration sheet is located on The Learning Center website (we recommend printing it from there and placing a copy of that sheet with your Badger Book).

Scan the master barcode below to configure your scanner for the first time or if you need to reset the scanner. In some cases, you may need to unplug the scanner and plug it back in after configuring it.

The volume barcodes can be scanned at any time and are used to adjust the volume of the beep noise when a Wisconsin Driver License or Wisconsin State ID is successfully scanned.



Volume (Optional)

Off	Low	Medium	High
			

## Pre-Election Set Up

Prior to Election Day, the Clerk or authorized designee, will complete a set of tasks to ensure the Badger Books are ready to use on Election Day.

# PRE-ELECTION DAY BADGER BOOK CHECKLIST

## Two weeks before Election Day:

- Set up Badger Books for one polling place (if possible, set up your Badger Books in the polling place where they will be used to ensure connectivity within that space)
  - Finalize physical layout for the polling place
  - Ensure polling place has ample outlets
  - Make sure there are clear pathways to voting area; avoid placing any cords in a way they could become disconnected or create a tripping hazard (tape down cords to help alleviate tripping hazard)
  - Order of Operations (see p. 22 of this manual)
    - Plug in the router to outlet in the room where voting will occur
    - Check in a voter on each machine
    - Print a voter slip to ensure printer is successfully printing
    - Configure Badger Book Scanners (if not already done; see p. 23 of this manual)
    - Search for voters using scanner on each machine
    - Process absentee ballots
  - Power off all machines
  - If you experience any hardware issues (touchscreen not working, keyboard not working, etc.) contact PDS support at 1-800-866-6090 or email [ClientCare@pdsit.net](mailto:ClientCare@pdsit.net)
  - If you experience any device connectivity or Badger Book software issues, contact the WEC Help Desk at (608) 261-2028 or email [elections@wi.gov](mailto:elections@wi.gov)
- If you have multiple polling places, set up your next set of machines and start the checklist from the beginning
- Conduct training for your Chief Inspectors and Super Users ahead of Election Inspector Training (encouraged to use Chiefs and Super Users to help training election inspectors – will provide additional experience and exposure to those users)
- Conduct Election Inspector Training
- Conduct outreach to voters regarding implementation of Badger Books and changes they should expect at the polling place (suggested)

## One week before Election Day:

- Create Election Inspector accounts
- Complete any addressing and absentee ballot work in WisVote to ensure the most up to date data is loaded onto the Badger Book
- Enter all voter registrations into WisVote by the Friday before the Election
- Print paper back up poll books (if not already printed) – on Election Day, have Election Inspectors sign the Certification page from the paper poll books

## Saturday/Sunday/Monday before Election Day:

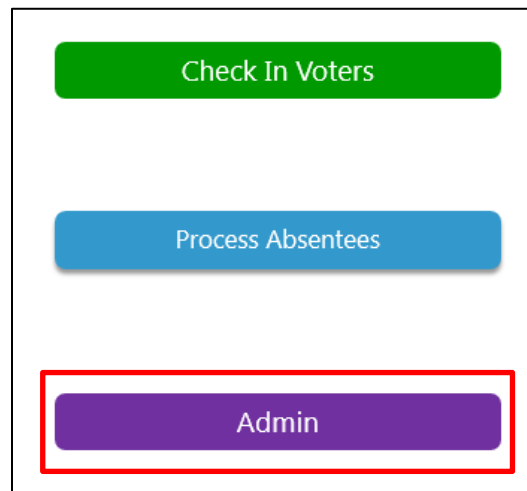
- If the municipality is open and issuing ballots the weekend before Election Day, be sure to issue all absentees in WisVote (this is how the absentee list is generated in Badger Books) – wait to pull your poll book detail data file until all registrations are entered and absentee ballots are issued in WisVote
- Print Inspectors' Statement (EL-104)
- Print Ineligible Voter List for each station that will process voter registrations
- Print blank Supplemental Poll Book pages
- Generate Pre-Election data (poll book data) from WisVote (see p. 33 of this manual for more detailed instruction)
- Physically set up devices (one router and server per space – follow the order of operations)
  - Follow the Order of Operations (see p. 23 of this manual)
  - Load Pre-Election data onto each server machine (remember, one router and one server per space)
  - Launch Badger Book and log in using administrative credentials
  - Configure the server for the reporting units which it will serve on Election Day
  - Conduct some testing . . .
    - Confirm voters for the selected reporting unit appear as a voter with a "Select" button next to their name on the Voter Search page
    - Confirm voters outside of the selected reporting units appear with a "Redirect" button next to their name
    - Confirm absentee ballots are appearing under the "Process Absentees" button
    - Run through a voter registration and create a new address; on the "Verify New Address" screen, verify all the wards, school districts, sanitary districts, and ballot styles are available for selection
    - If any of the above actions resulted in a voter number being assigned, reset the voter count to zero
    - Confirm the voter count is set to zero
  - Multiple polling places - repeat steps starting with "Physially set up devices . . ."
  - Shut down Badger Books

## Set Up Election Inspector Accounts

Each Election Inspector should have his/her own account in Badger Book that may be accessed with a unique login and password.

### Set Up Election Inspector Accounts

1. Log into the Badger Book application
2. Select the "Admin" button from the main navigation page



3. Navigate to the "Poll Worker" tab
4. To create a new poll worker record, select "Create New Poll Worker"
5. Poll worker details will display along the right side of the screen; enter the election inspector's First and Last names in the "Name" field
6. Enter a login ID for the election inspector in the "Login ID" field (to create a unique ID, it is recommended to use the first two letters of the first name, the middle initial, and the first letters of the last name – this field is not case sensitive)
7. Request the election inspector to enter a password in the "Password" field; passwords must be at least 8 characters long and ARE case sensitive (when initially establishing election inspector accounts, it is okay to assign a generic password for all of the accounts and then request the inspectors to change the passwords to unique ones either during training or prior to using Badger Book on Election Day)
8. Most Election Inspectors (with the exception of the Chief Inspector and Super User) should not have access to the Admin functions; select "no"
9. Select "Create" to finish this process (the addition should now appear in the "Poll Worker List")
10. In the future, should you need to update a name, login, password, or access level, select "Update" next to the name requiring an edit

## Generate and Download **TRAINING DATA** from WisVote

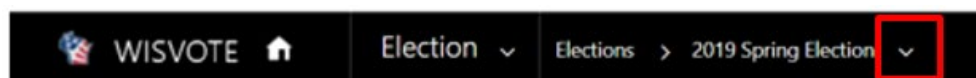
You may wish to use your own municipal data (from a prior election) to train Election Inspectors on how to use Badger Books. Because you are using data from a prior election, you may do this process at anytime prior to training (follow instructions carefully to ensure no impact old poll book records/print dates, etc.)

### Generate and Download Training (Poll Book) Data

1. Log into WisVote
2. Click the "Elections" tile
3. Choose the election from where you wish to pull the data (the default view is "Current Elections" – if the election you want is not displaying, change the view to "Active Elections")
4. Double click the name of the election

Election Date	Name	Jurisdiction	Registration Closed On	Election Type	Governmer
0/4/2019	Village of Raymond Special Ele...	Village of Raymond - RACINE C...	3/13/2019	Special Election	Municipal
5/7/2019	2019 Dane County Supervisory...	DANE COUNTY	4/17/2019	Special Primary	County
5/7/2019	2019 Town of Vernon Special El...	TOWN OF VERNON - WAUKES...	4/17/2019	Special Election	Municipal
4/30/2019	2019 Special Election Assembly...	STATE OF WISCONSIN	4/10/2019	Special Election	State
4/2/2019	<b>2019 Spring Election</b>	STATE OF WISCONSIN	3/13/2019	Spring Electio...	State
2/19/2019	2019 Spring Primary	STATE OF WISCONSIN	1/30/2019	Spring Primar...	State

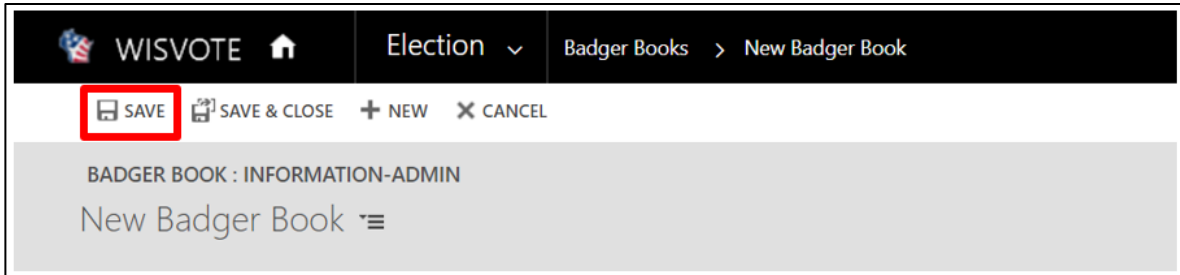
5. From the Election Information screen, click the down arrow to access the common tiles



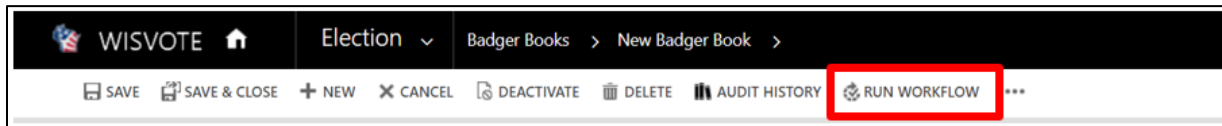
6. Select the Badger Book common tile



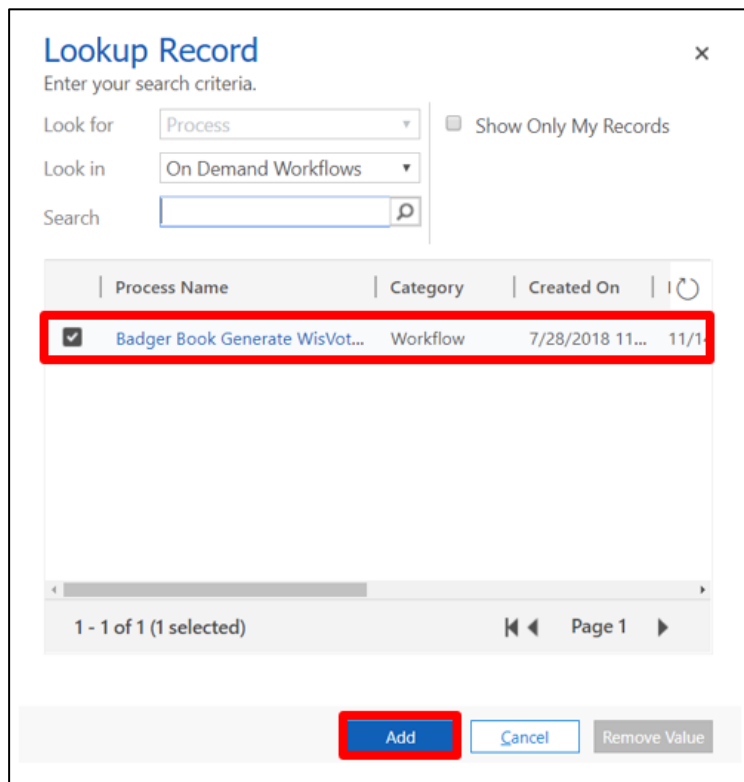
- Click "+Add New Badger Book" record in the top left corner **(if there is already a Badger Book record on this screen for this specific election, CREATE A NEW RECORD – do not run the risk of modifying/deleting participation from a prior election)**
- The Badger Book: Information-Admin screen will open; click "SAVE"



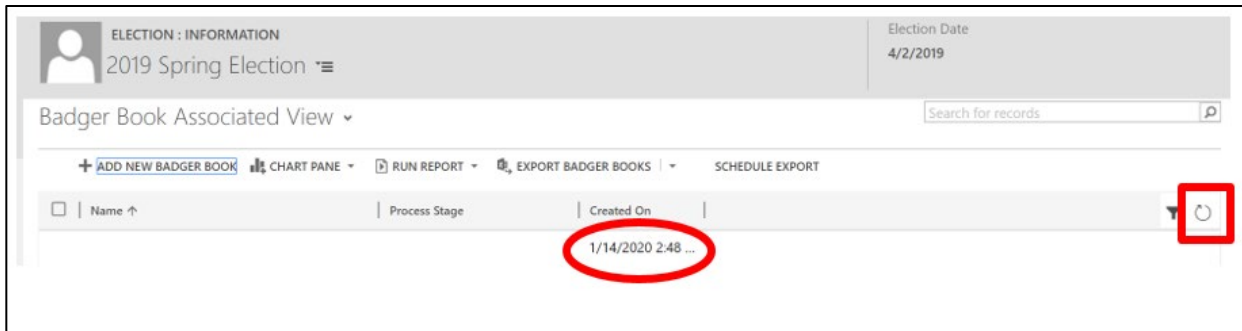
- New options will display; click "Run Workflow" (from same Badger Book screen – may need to expand the size of the pop-up window to see this option)



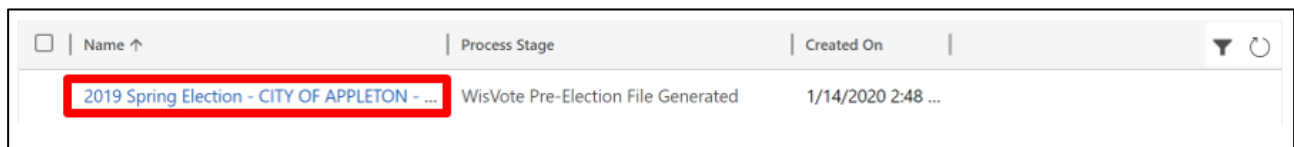
- Click "Add" from the new workflow dialog box (the correct file will already be selected)



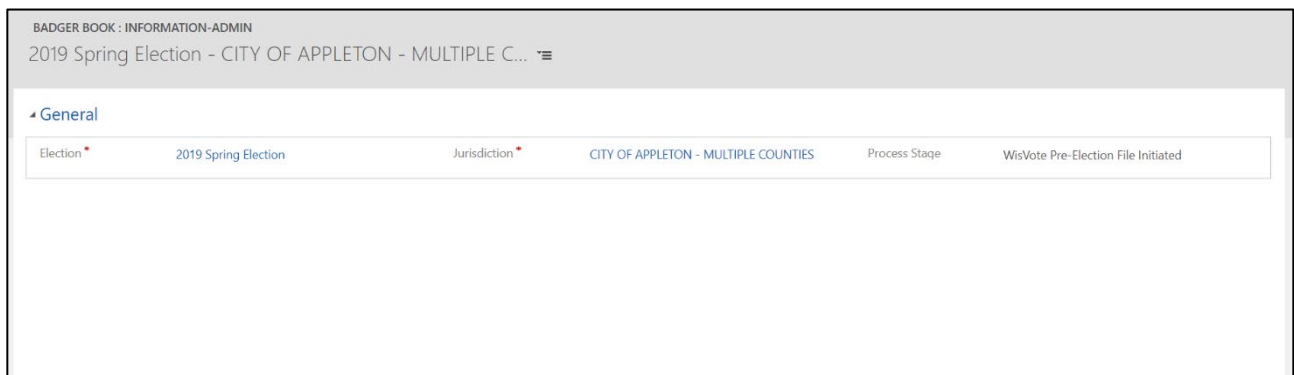
11. A pop-up window will display; click "OK" to confirm the application of the workflow
12. After returning to the Badger Book Information-Admin screen, click "SAVE & CLOSE"
13. From the Election Information screen, you may notice a "Created On" date with no file name or indication of the process stage, click the refresh button to populate the file name (please be patient – may need to refresh a couple times)



14. Once the name of the file and process stage are populated, click on the name of the Badger Book record just created

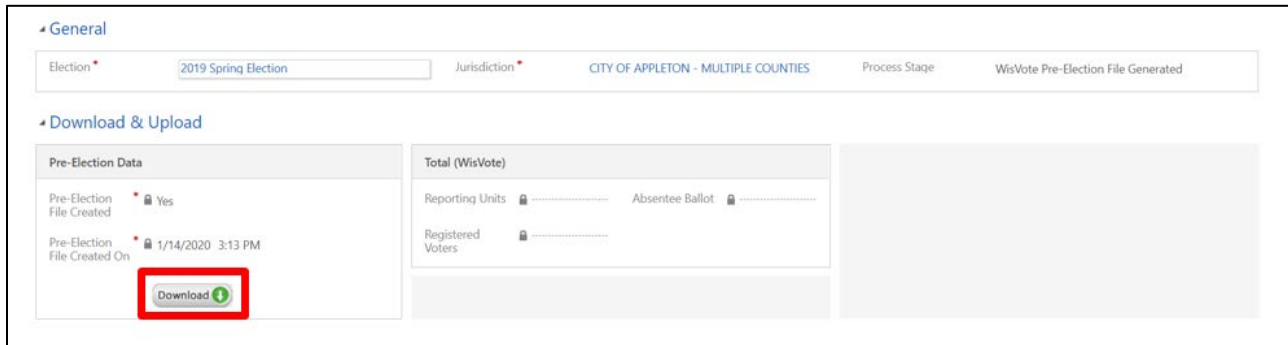


15. From the Badger Book information-Admin screen, it may take a while (3-10 minutes) to generate the Badger Book Data file (to refresh the screen, hit F5 on your keyboard)

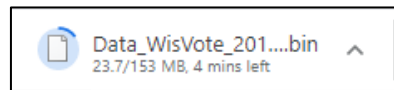




16. Once the Badger Book data file is available, click the “Download” button



17. The file will appear in the bottom left hand corner of your screen. After the file downloads, it will be located in the Downloads folder of your device (make also click the up arrow and click “Show in folder” – please wait until the download is complete)



18. Save the data file to a USB device and transfer it to a Badger Book **server** machine

- a. Turn on server machine and login to the device (make sure it is connected to a Badger Book router)
- b. Launch the Badger Book application and login
- c. Click on the “Admin” button
- d. Go to the “Pre-Election Data” tab
- e. Click on “Import Details” button, browse out to the USB drive, and select data file
- f. Upon completion of data upload, a confirmation box will appear (this process will take several minutes)

## Generate and Download Pre-Election Data from WisVote

On the Saturday/Sunday/Monday prior to the election, download the Pre-Election data from WisVote, save it to a dedicated Badger Book USB drive, and load the data on to the Badger Book server machine(s). Waiting until the day prior to the election will help ensure the most up-to-date data is used for the electronic poll book (could start this process as early as 5PM the Friday prior to the election – wait until all registrations are entered into WisVote and all absentees are issued in WisVote).

## Generate and Download Pre-Election Data (Poll Book Data)

1. Log into WisVote
2. Click the "Elections" tile
3. Click on the name of the current election

Election Date...	Name ↑	Jurisdiction	Registration ...	Election Type...	Government ...
11/3/2020	2020 General Election	STATE OF WISCONSIN	10/14/2020	General Electi...	Federal
8/11/2020	2020 Partisan Primary	STATE OF WISCONSIN	7/22/2020	Partisan Prim...	Federal
5/12/2020	2020 Special Election Represen...	STATE OF WISCONSIN	4/22/2020	Special Election	Federal
4/7/2020	2020 Spring Election and Presi...	STATE OF WISCONSIN	3/18/2020	Spring Electio...	Federal
2/18/2020	2020 Spring Primary	STATE OF WISCONSIN	1/29/2020	Spring Primar...	State

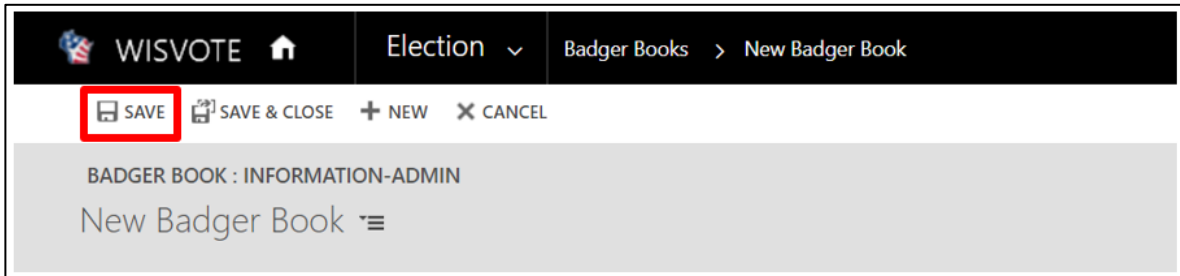
4. From the Election Information screen, click the down arrow to access the common tiles



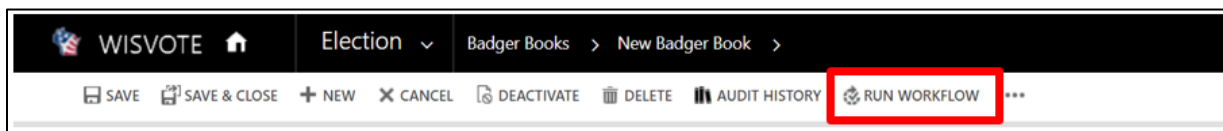
5. Select the Badger Book common tile



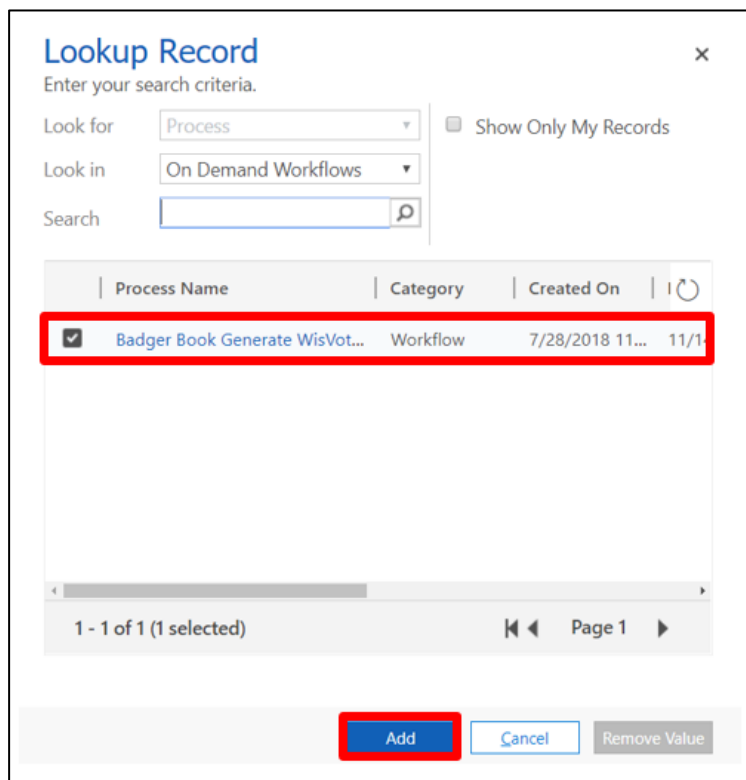
- Click "+Add New Badger Book" record in the top left corner (**you should expect to create a new record – no other Badger Book records should exist UNLESS you used this election to create a data file for training purposes - CREATE A NEW RECORD FOR THIS PROCESS**)
- The Badger Book: Information-Admin screen will open; click "SAVE"



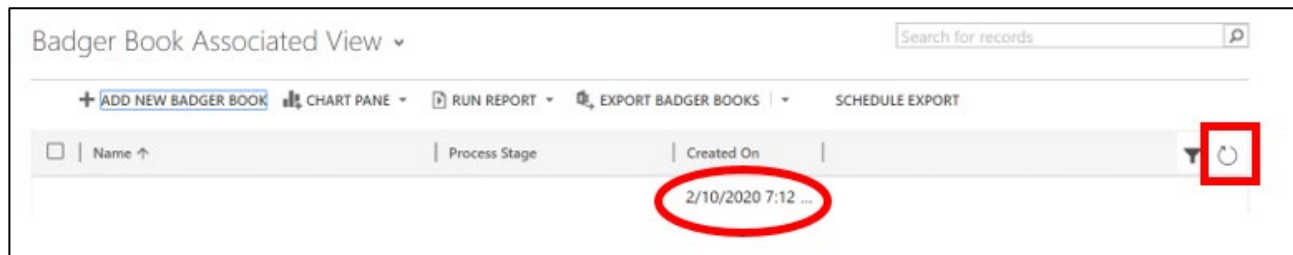
- New options will display; click "Run Workflow" (from same Badger Book screen – may need to expand the size of the pop-up window to see this option)



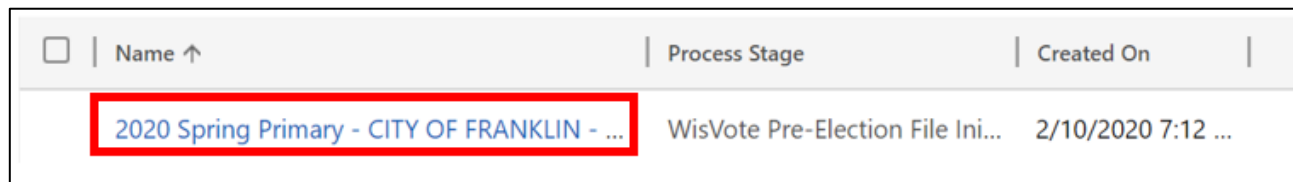
- Click "Add" from the new workflow dialog box (the correct file will already be selected)



10. A pop-up window will display; click "OK" to confirm the application of the workflow
11. After returning to the Badger Book Information-Admin screen, click "SAVE & CLOSE"
12. From the Election Information screen, you may notice a "Created On" date with no file name or indication of the process stage, click the refresh button to populate the file name (please be patient – may need to refresh a couple times)



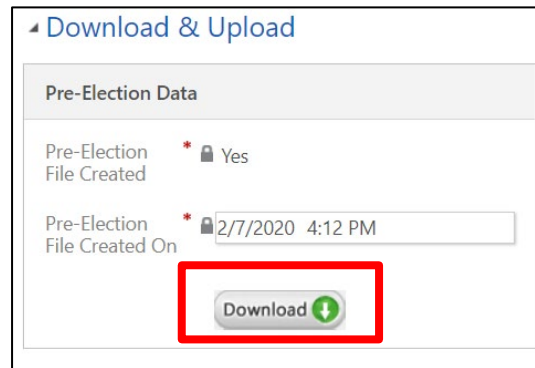
13. Once the name of the file and process stage are populated, click on the name of the Badger Book record just created



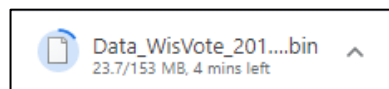
14. This file will be located under the Badger Book information-Admin screen (a new **Download and Upload** section will appear on this page when the process is complete). This is a large file containing all voter names, so it will take a while (3-10 minutes) to generate the Badger Book Data file (to refresh the screen, hit F5 on your keyboard)



15. Once the Badger Book data file is available, click the "Download" button



16. The file will appear in the bottom left hand corner of your screen. After the file downloads, it will be located in the Downloads folder of your device (make also click the up arrow and click "Show in folder" – please wait until the download is complete)



17. Save the data file to a USB device and transfer it to a Badger Book **server** machine
- Turn on server machine and login to the device (make sure it is connected to a Badger Book router)
  - Launch the Badger Book application and login
  - Click on the "Admin" button
  - Go to the "Pre-Election Data" tab
  - Click on "Import Details" button, browse out to the USB drive, and select data file
  - Upon completion of data upload, a confirmation box will appear (this process will take several minutes)

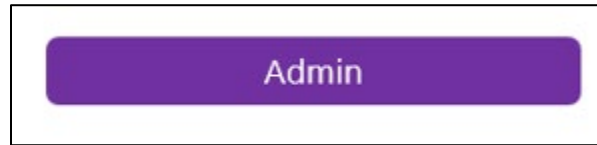
## Set Reporting Unit(s)

The Pre-Election data file contains the active voters for an entire municipality. A reporting unit must be selected in order for the correct voters to appear in the poll book.

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### Select Reporting Unit(s)

1. Log into the Badger Book using administrative credentials
2. Select the "Admin" button



3. Click the "Reporting Unit" tab
4. Search and "Select" the reporting unit(s) associated with the polling location (reporting units can be "Deselected" until a voter has been processed in that particular reporting unit)

## Election Day

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### ELECTION DAY BADGER BOOK CHECKLIST

#### 6:00 am – 6:30 a.m.

- Set up Badger Books (see p. 23 of this manual for the Order of Operations)
  - Connect or verify each machine is connected to “EPollBook” network (see Badger Book User Manual for detailed instruction)
- Calibrate scanners (if needed)
- Confirm election data is set for the correct polling place and election

#### 6:30 am – 6:45 a.m.

- Confirm all Election Inspector accounts are set up
- Create new users, if necessary
- Have Election Inspectors update their passwords, if necessary
- “Open Polls”

#### 7:00am – 8:00 p.m.

- Process voters
- Process absentee ballots
  - If there is typically a slow period during the day, process your absentee ballots at that time
- Process Election Day Registrations

#### After 8:00 p.m.

- After all voters have been checked in and all absentee ballots are processed
  - “Close Polls”
  - Plug USB into base of the server
  - “Export Latest Data File and Report(s) to USB”
- Break down Badger Books

## Open/Reopen Polls

After setting up the hardware, networking the devices, and launching the Badger Book software, a user with Admin credentials must "Open Polls." The act of "opening the polls" on Badger Book is required to permit any other users access the software, and the poll book itself. Inspectors will not be able to check-in voters, process EDRs, or record absentee ballots prior to the polls being open (they will see a blank screen with Status: Polls Closed). The Admin user should click "Open Polls" about 15-20 minutes before 7:00 a.m. to ensure that the correct reporting units are selected, and the voter count is re-set to zero prior to opening the doors.

### Open Polls on Election Morning (Admin User Only)

1. Confirm all Open Poll Checklist items have a green checkmark

If a red X appears, correct the error by clicking "Admin" and either:

- a. Go to Reporting Units tab and select the reporting units applicable to your polling place and then return to the Main screen; or
- b. Go to Post-Election Data tab and click "Reset Voter Count to Zero" and then return to the Main screen

Open Polls Checklist	
Reporting Units Selected	✗
Voter Count Reset to Zero	✓
<b>Admin</b>	

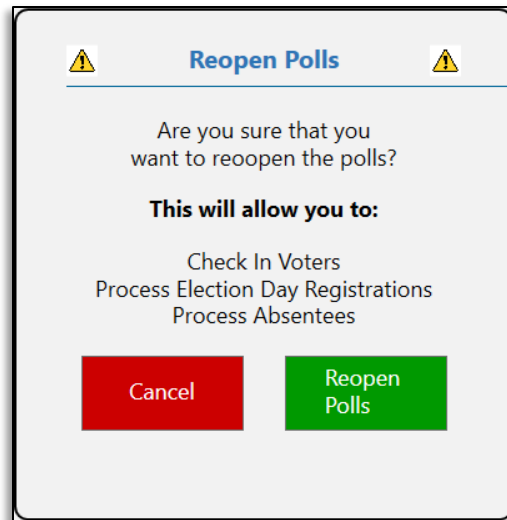
Open Polls Checklist	
Reporting Units Selected Wards 1-10,12-15,11	✓
Voter Count Reset to Zero	✓
<b>Open Polls</b>	

2. Select the green **Open Polls** button

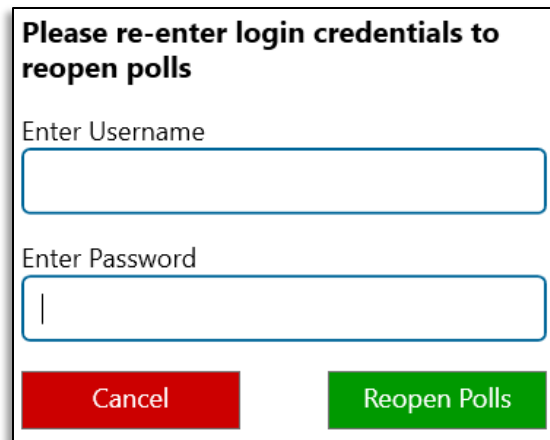


## Reopen Polls (Admin User Only)

1. Go to the Overview tab of the Admin menu
2. Select the green "Reopen Polls" button
3. Verify the reopening of the polls by selecting "Reopen Polls" from the warning pop-up (if this function as selected in error, or you do not wish to close the polls, click "Cancel"



4. To continue to reopen the polls, reenter the login credentials of the Admin user



A form titled "Please re-enter login credentials to reopen polls". It contains two input fields: "Enter Username" and "Enter Password". Below the fields are two buttons: a red "Cancel" button and a green "Reopen Polls" button.

5. Select "Reopen Polls"

## Check In a Voter

On Election Day, voters must check in at their correct ward to receive a ballot. This process has traditionally been done with the use of paper poll books. Badger Book provides an electronic means for the check in process.

### Elector is a Registered Voter

1. Ask the voter to state his/her name and address
2. Select "Voter stated name and address" button
3. Search for the voter by typing his/her last name (minimum of 2 characters required) in the "Last Name" field

A screenshot of a search interface. At the top, the text "Last Name" is displayed. Below it is a text input field containing the characters "Jo".

Results will begin to appear as search criteria is entered (add additional search criteria until the correct voter record appears)

A screenshot of a search results form. It contains three input fields: "Last Name" with "Jo", "First Name" with "Jo", and "Middle Initial" which is empty. Below these is a large "Address" input field.

4. Once the correct voter's name is identified from the list, click "Select Voter" button
5. Ask to see the voter's photo ID Select the type of photo ID presented from the list by clicking the associated button

A screenshot of a selection screen for photo ID types. It features two columns of blue buttons. The left column contains: "WI Driver License", "WI Student college/university ID", "U.S. Passport Book or Card", "U.S. Certificate of Naturalization", and "WI DMV ID Petition Process photo receipt". The right column contains: "WI State ID", "U.S. Uniformed Services ID", "Veteran Affairs ID", "Tribal ID", and "WI DOT Driver License or State ID receipt". At the bottom center is a button labeled "Voter Does Not Have A Photo ID".

- Using the ID requirements displayed on the screen, review the presented ID to determine whether it is acceptable

**Select type of photo ID**

**NAME** conforms to name on poll book:

**PHOTO** reasonably resembles the voter or ID states "VALID WITHOUT PHOTO"

**EXPIRATION DATE** – After

Acceptable even if driving privileges are revoked or suspended

**Do not review the address on the photo ID**

- If the ID meets all requirements, select "Acceptable"
- Ask the voter to sign and select "Done"
- Review the signature and click "Accept Signature"
- Hand the voter the paper slip that prints from the printer (if the voter is required to go to a separate table to receive a ballot), or retain the voter number slip at the check in table
- Select "Finish – Next Voter" to complete this process and to check in the next voter

## Elector Requested Curbside Voting

Follow the polling place curbside practices for announcing the voter's name and address, retrieving the voter's photo ID, and distributing the ballot

- Search for the voter by typing his/her last name (minimum of 2 characters required) in the "Last Name" field; results will begin to appear as search criteria is entered (add additional search criteria until the correct voter record to appear
- Once the correct voter's name is identified in the list, click "Select Voter" button
- Ask to see the voter's photo ID
- Select the type of photo ID presented from the list by clicking the associated button
- Using the ID requirements displayed on the screen, review the presented ID to determine whether it is acceptable
- If the ID meets all requirements, select "Acceptable"
- Select "DONE" as the voter will NOT be providing a manual signature
- Select "Curbside Voter" button
- Review and accept the watermark in the signature field by selecting "Accept Signature"



# Ballot Received at Poll Entrance

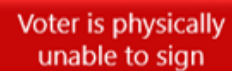
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**Voter Signature**

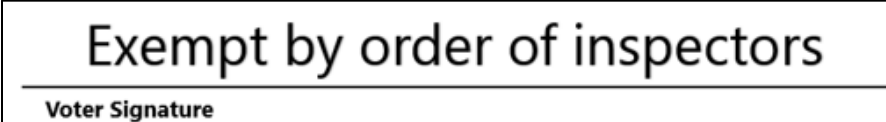
10. Hand the voter the paper slip that prints from the printer (if the voter is required to go to a separate table to receive a ballot), or retain the voter number slip at the check in table
11. Select "Finish – Next Voter" to complete this process and to check in the next voter

## Elector is Physically Unable to Sign

1. Ask the voter to state his/her name and address
2. Select "Voter stated name and address" button
3. Search for the voter by typing his/her last name (minimum of 2 characters required) in the "Last Name" field; results will begin to appear as search criteria is entered (add additional search criteria until the correct voter record appears)
4. Once the correct voter's name is identified in the list, click "Select Voter" button
5. Ask to see the voter's photo ID
6. Select the type of photo ID presented from the list by clicking the associated button
7. Using the ID requirements displayed on the screen, review the presented ID to determine whether it is acceptable
8. If the ID meets all requirements, select "Acceptable"
9. Select "DONE" as the voter will NOT be providing a manual signature
10. Select "Voter is physically unable to sign" button
11. Review and accept the watermark in the signature field by selecting "Accept Signature"



Voter is physically  
unable to sign



Exempt by order of inspectors

---

Voter Signature

12. Hand the voter the paper slip that prints from the printer (if the voter is required to go to a separate table to receive a ballot), or retain the voter number slip at the check in table
13. Select "Finish – Next Voter" to complete this process and to check in the next voter

## Elector is a Confidential Voter

1. Ask the voter to state his/her name and address
2. Once the voter informs the election inspector that he/she is a confidential voter, there is **NO** requirement for the confidential voter to state a name or address aloud (instead, the voter will present a "Voting Identification Card")
3. Select the "confidential voter" link (on the state name/address screen) and continue to check in the voter
4. Search for the voter using the Identification Serial Number from the Voting Identification Card

### **OR**

Alternatively, search for the voter by typing his/her last name (minimum of 2 characters required) in the "Last Name" field; results will begin to appear as search criteria is entered (add additional search criteria until the correct voter record appears)

**NOTE:** Results will not display a confidential voter's address and as a result, a confidential voter's name and address CANNOT be updated in the Badger Book

5. Once the correct voter's name is identified from the list, click "Select Voter" button
6. Ask the voter to sign and select "Done" (confidential voters are **NOT** required to show photo ID)
7. Review the signature and click "Accept Signature"
8. Hand the voter the paper slip that prints from the printer (if the voter is required to go to a separate table to receive a ballot), or retain the voter number slip at the check in table
9. Select "Finish – Next Voter" to complete this process and to check in the next voter

## No Photo ID or Photo ID Not Acceptable

1. Ask the voter to state his/her name and address
2. Select "Voter stated name and address" button
3. Search for the voter by typing his/her last name (minimum of 2 characters required) in the "Last Name" field

A rectangular box with a black border. At the top, the text "Last Name" is displayed. Below it is a rounded rectangular input field containing the text "Jo".

Results will begin to appear as search criteria is entered (add additional search criteria until the correct voter record appears)

A form with a black border. It contains three input fields at the top: "Last Name" with "Jo", "First Name" with "Jo", and "Middle Initial" which is empty. Below these is a larger "Address" input field.

4. Once the correct voter's name is identified from the list, click the "Select Voter" button
5. Ask to see the voter's photo ID
6. Select the type of photo ID presented from the list by clicking the associated button



7. Using the ID requirements displayed on the screen, review the presented ID to determine whether it is acceptable

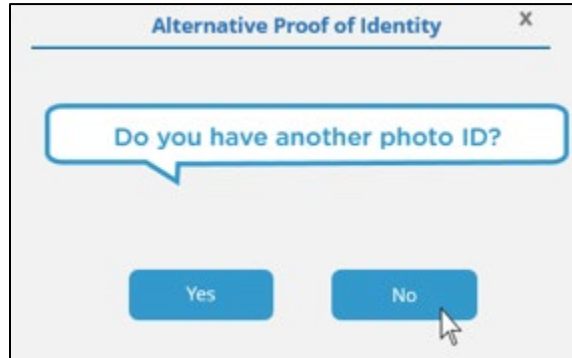
A form titled "Select type of photo ID" with a black border. It contains the following text and fields:
 

- NAME** conforms to name on poll book: [John Johnson]
- PHOTO** reasonably resembles the voter or ID states "VALID WITHOUT PHOTO"
- EXPIRATION DATE** - After [Will always populate with date of last General Election]
- Acceptable even if driving privileges are revoked or suspended
- A blue button at the bottom with the text "Do not review the address on the photo ID"

8. If the ID expired since the last General Election, select "Not Acceptable"
9. Ask the voter for another form of photo ID

10. If the voter does NOT have an alternative form of photo ID, click "No"

NOTE: If the voter did have an alternative form of photo ID, select "Yes" to return to the Photo ID options screen

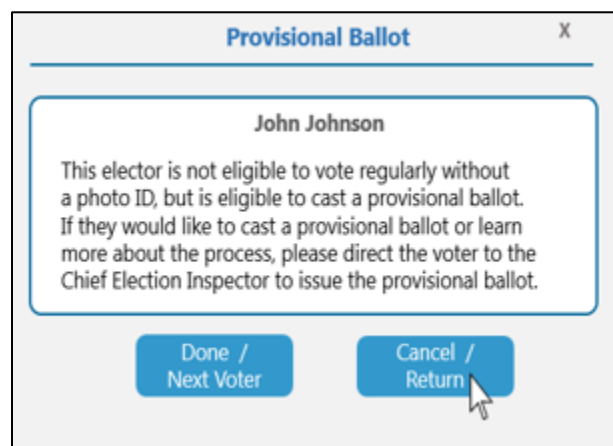


NOTE: If "Not Acceptable" previously selected in error, click the "X" in the top right-hand corner of this screen to return to the Photo ID Review screen

11. The voter is eligible for a provisional ballot and the "Provisional Ballot" pop-up window will appear (Badger Book cannot process provisional ballots)

**If the voter wants to cast a provisional ballot, direct the voter to the Chief Election Inspector to complete that process (provisional voters/ballots WILL NOT be recorded or counted on the Badger Book)**

Select "Done / Next Voter" to complete this process and to check in the next voter



NOTE: If "No" previously selected in error, select "Cancel / Return"

NOTE: You will also see the "Provisional Ballot" pop-up window if you ever select "Voter Does Not Have a Photo ID" from the Photo ID options screen

The screenshot shows a user interface for selecting a photo ID. At the top, a blue callout box contains the text "May I please see your photo ID?". Below this, the heading "Select type of photo ID" is centered. The screen displays two columns of blue buttons. The left column includes: "WI Driver License", "WI Student college/university ID", "U.S. Passport Book or Card", "U.S. Certificate of Naturalization", and "WI DMV ID Petition Process Photo Receipt". The right column includes: "WI State ID", "U.S. Uniformed Services ID", "Veterans Affairs ID", "Tribal ID", and "WI DOT Driver License or State ID Receipt". At the bottom center, there is a button labeled "Voter Does Not Have A Photo ID" with a mouse cursor pointing to it.



## Redirect a Voter (registered voter in the wrong polling location)

1. Ask the voter to state his/her name and address
2. Select "Voter stated name and address" button
3. Search for the voter by typing his/her last name (minimum of 2 characters required) in the "Last Name" field; results will begin to appear as search criteria is entered (add additional search criteria until the correct voter record appears)
4. The voter's name will appear in the search results in an orange highlighted row (this is an indicator the individual is a registered voter who is in the wrong polling place location and requires assistance and redirection to the correct location)

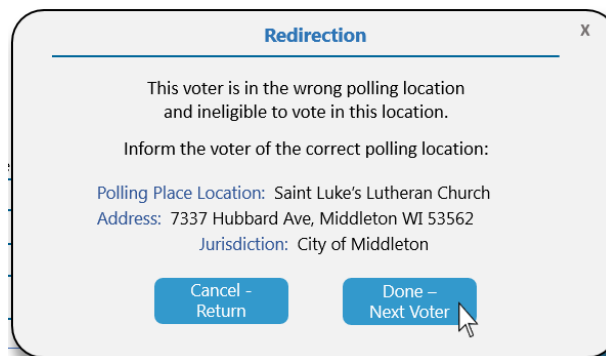
Select "Redirect" to identify the voter's correct polling place location and to redirect the voter to the correct location

Select Voter	Absentee Issued	John Johnson	1087 Chelsey Drive Waukesha, WI 53186	12241092	Update Name Update Address
Redirect		John Johnson	1087 Chelsey Drive Madison, WI 53703		Update Name Update Address

5. The voter's correct polling location information will appear in the "Redirection" pop-up window

Provide the voter with the correct information, verbally or in writing, if necessary

Select "Done – Next Voter" to complete this process and to check in the next voter



NOTE: If "Redirect" selected in error, click "Cancel – Return"

## Typo in Voter Name or Address

1. Ask the voter to state his/her name and address
2. Select "Voter stated name and address" button
3. Search for the voter by typing his/her last name (minimum of 2 characters required) in the "Last Name" field; results will begin to appear as search criteria is entered (add additional search criteria until the correct voter record appears)
4. Once the correct voter's name is identified in the list, select either the "Update Name" or "Update Address" button
  - a. Update Name Options:
    - i. "Misspelling" option will provide an open text box to note the misspelling in the voter's name (e.g., a typo, no reference to Jr., etc.); add notes about the misspelling and click "Finish"
    - ii. "Name Change" option will route user to the Election Day Registration process (if a voter was married since the last election resulting in a name change, new registration is required)
  - b. Update Address Options:
    - i. "Misspelling" option will provide an open text box to note the misspelling in the voter's name (e.g., a typo, no reference to Jr., etc.)
    - ii. "Address Change" option will route user to the Election Day Registration process (if a voter moved since the last election resulting in a address change, new registration is required)

NOTE: Noting misspellings will NOT reflect in the poll book (the clerk will extract these notes in a report after the election and make appropriate changes in WisVote after the election)

## Election Day Notations/Adding Notes

1. Select "Voter stated name and address" button
2. Search for the voter's name
3. Locate record (will have a voter number notation after check in completed)
4. Select the "Add Notes" button
5. Enter the appropriate note information (i.e., challenged, court order, etc.)
6. Select "Save Notes"
7. Search for the next voter to notate

or

Select Start-Over New Voter to return to check-in screen

NOTE: Notes can only be added after the check-in process has been completed and the elector has been issued a voter number

## Election Day Registration

On Election Day, some electors may wish to register to vote at the polling place location. This process has traditionally been done by requesting the voter complete a paper voter registration form and provide the appropriate proof of residence documentation. Badger Book provides an electronic means for election day registration. **To help expedite this process, a scanner may be used to scan an unexpired State of Wisconsin Driver License and/or State ID.**

### Register a Voter on Election Day

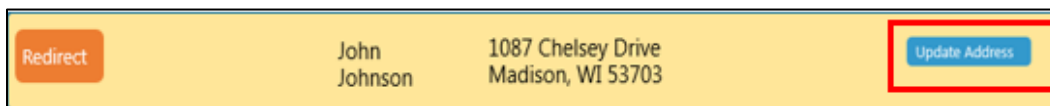
1. Ask the voter to state his/her name and address
2. Select "Voter stated name and address" button

**NOTE: Scanning an unexpired Wisconsin Driver License or State ID can expedite the EDR process by populating fields like Last Name, First Name, Driver License Number, etc. on related screens (manual process requires that type of information be hand typed into appropriate tables)**

3. Search for the voter by typing his/her last name (minimum of 2 characters required) in the "Last Name" field or by scanning the back of the voter's Wisconsin Driver License or State ID; results will begin to appear as search criteria is entered (add additional search criteria until the correct voter record appears)

NOTE: Once the scanner registers with Badger Book, a spinning wheel will appear on the screen to indicate a search is in progress (it will take a few seconds for the name to populate the fields)

If results appear and the row is highlighted orange, confirm whether the voter's previous address matches any of the results; if the name and address are familiar to the voter (prior address), select the "Update Address" button to proceed to Election Day Registration



4. If NO results are found or the original address is NOT familiar to the voter (prior address), select the "None of these are my voter – Continue to Election Day Registration" button

None of these are my voter -  
Continue to Election Day Registration

- Step (1) of Election Day Registration is to verify a voter's Proof of Residence (POR); ask to see the voter's POR (if not already in hand and hold on to the document)

By scanning the ID in Step 3 (and if the ID is not currently expired, the voter's information will populate the appropriate fields; confirm the information as you advance through each step of the registration process.

- Select/verify the type of POR provided by the voter and record the entity name and document number, if appropriate

Proof of Residence Type:	<input type="text" value="Driver License"/>	▼
Issuing Entity Name (e.g. WI DOT, utility company name, etc.)	<input type="text" value="DMV"/>	
Document Number (if any)	<input type="text" value="4754"/>	

Then select "Continue to Step 2"

- In step (2) of Election Day Registration, record/verify the voter's name, including middle name and suffix;

Last Name	First Name	Middle Name		
<input type="text" value="Johnson"/>	<input type="text" value="John"/>	<input type="text" value="Jim"/>	<input type="text" value="JR"/>	▼
<input type="radio"/> Voter does not have middle name				

If applicable; enter/verify the voter's date of birth;

Birth Date					
<input type="text" value="12"/>	/	<input type="text" value="05"/>	/	<input type="text" value="1985"/>	

Ask the voter if he/she want to provide contact information and record it in the optional "Email" and "Phone Number" fields;

Finally, ask whether the voter has a prior name and whether that prior name was used for voter registration; if the answer is yes, record it by clicking the "Voter has a prior name" checkbox and entering the previous name;

Then select "Continue to Step 3"

8. In Step (3) of Election Day Registration process, record the voter's address as it appears on the POR document

Search of the voter's address using the "home Address" field by entering the house number and street name (you must enter a minimum of 3 characters for results to begin to populate in the drop-down menu)

Home Address
<b>W165N8436 Lavergne Ave</b>

NOTE: If the address does not appear in the results, you must:

- Confirm the voter is in the correct polling place
- Add new address
- District the voter
- Assign the correct ballot style

Refer to the Election Day Registration – New Address Instructions to steps to follow for an Election Day Registration with a new address

Once the address is selected, it will pull into the address fields

House Number	Street Name	Building Name
<b>W165N8436</b>	<b>Lavergne Ave</b>	
Apartment/Unit Type		Apartment/Unit Number
<b>APT</b> ▼		<b>135</b>
City		Zip Code
<b>Menomonee Falls</b>		<b>53051</b>

Ask whether the voter has a prior address previously used for registration, or whether the voter's mailing address is different from the home address; select the relevant radio button and record the address information

Then select "Continue to Step 4"

9. Verify the voter's eligibility in Step (4) of the Election Day Registration process; ask the voter to answer the six "Yes" or "No" eligibility questions

If the voter has a WI Driver License or State ID, entry of the identification number and expiration date is required

Do you have a WI driver license or a WI state identification card?		<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="button" value="More Information"/>
Driver License or State ID	Expiration Date			
<b>J555-9999-2222-03</b>	<b>11/11/2020</b>			
		<input type="radio"/>	My WI ID does not have an expiration date.	

If the voter does not have a WI Driver License or State ID, entry of the last four digits of the voter's social security number is required

Do you have a WI driver license or a WI state identification card?		<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="button" value="+ More Information"/>
Do you have a social security number?		<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="button" value="+ More Information"/>
Last Four Digits of SSN	Confirm Last Four Digits of SSN			
<input type="text" value="7474"/>	<input type="text" value="7474"/>			

NOTE: The elector is still allowed to register even if "No" is selected for both questions as the signature on the form certifies that the individual has neither a driver license/state identification number, nor a social security number

10. Ask the voter to review all information on the Review page. Select "Edit" next to a field if there are any necessary edits, to jump back to that screen. Select "Continue to Step 6"
11. Ask the voter to verify and select the certification statement to accept all stated conditions. Next, the voter should provide their signature in the first yellow box. The election inspector should then sign the second yellow box

Select "Continue to Complete Registration" to finish the Election Day Registration process

12. On the final page, ask the voter if they would like to continue and vote today. If so, select "Continue to Check In" to continue to Photo ID verification. If the voter is registering only, select "Elector does not want to vote, Finish – Next Voter"

John Johnson is now registered!

Continue to Check in Voter

Elector does not want to vote  
**Finish - Next Voter**

NOTE: If a voter completes the Election Day Registration (EDR) process and chooses not to receive a ballot immediately ("Continue to Check in Voter") AND THEN RETURNS to the polling place again later for a ballot, the EDR process must be completed again (even if the elector goes to same machine).

## Election Day Registration with a New Address

On Election Day, some electors may wish to register to vote at the polling place location. This process has traditionally been done by requesting the voter complete a paper voter registration form and provide the appropriate proof of residence documentation. Badger Book provides an electronic means for election day registration **To help expedite this process, a scanner may be used to scan an unexpired State of Wisconsin Driver License and/or State ID.**

### Register a Voter on Election Day

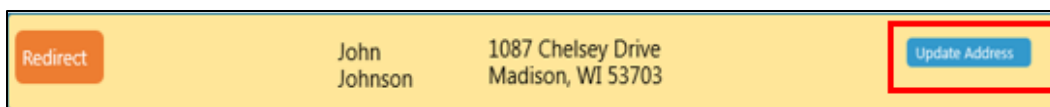
1. Ask the voter to state his/her name and address
2. Select "Voter stated name and address" button

**NOTE: Scanning an unexpired Wisconsin Driver License or State ID can expedite the EDR process by populating fields like Last Name, First Name, Driver License Number, etc. on related screens (manual process requires that type of information be hand typed into appropriate tables)**

3. Search for the voter by typing his/her last name (minimum of 2 characters required) in the "Last Name" field or by scanning the back of the voter's Wisconsin Driver License or State ID; results will begin to appear as search criteria is entered (add additional search criteria until the correct voter record appears)

NOTE: Once the scanner registers with Badger Book, a spinning wheel will appear on the screen to indicate a search is in progress (it will take a few seconds for the name to populate the fields)

If results appear and the row is highlighted orange, confirm whether the voter's previous address matches any of the results; if the name and address are familiar to the voter (prior address), select the "Update Address" button to proceed to Election Day Registration



4. If NO results are found or the original address is NOT familiar to the voter (prior address), select the "None of these are my voter – Continue to Election Day Registration" button

None of these are my voter -  
Continue to Election Day Registration

- Step (1) of Election Day Registration is to verify a voter's Proof of Residence (POR); ask to see the voter's POR (if not already in hand and hold on to the document)

By scanning the ID in Step 3 (and if the ID is not currently expired, the voter's information will populate the appropriate fields; confirm the information as you advance through each step of the registration process.

- Select/verify the type of POR provided by the voter and record the entity name and document number, if appropriate

Proof of Residence Type:

Issuing Entity Name (e.g. WI DOT, utility company name, etc.)

Document Number (if any)

Then select "Continue to Step 2"

- In step (2) of Election Day Registration, record/verify the voter's name, including middle name and suffix;

Last Name:  First Name:  Middle Name:

Voter does not have middle name

If applicable; enter/verify the voter's date of birth;

Birth Date:  /  /

Ask the voter if he/she want to provide contact information and record it in the optional "Email" and "Phone Number" fields;

Finally, ask whether the voter has a prior name and whether that prior name was used for voter registration; if the answer is yes, record it by clicking the "Voter has a prior name" checkbox and entering the previous name;

Then select "Continue to Step 3"



8. In Step (3) of the Election Day Registration process, record the voter's address as it appears on the POR document

Search of the voter's address using the "home Address" field by entering the house number and street name (you must enter a minimum of 3 characters for results to begin to populate in the drop-down menu)

Home Address
Create New Address

NOTE: If the address does not appear in the results, you must:

- Confirm the voter is in the correct polling place
- Add new address
- District the voter
- Assign the correct ballot style

Type the address into the appropriate fields

House Number	Street Name	Building Name
W165N8436	Lavergne Ave	
Apartment/Unit Type	Apartment/Unit Number	
APT	135	
City	Zip Code	
Menomonee Falls	53051	

Ask whether the voter has a prior address previously used for registration, or whether the voter's mailing address is different from the home address; select the relevant radio button and record the address information

Then select "Continue to Step 4"

9. Verify the voter's eligibility in Step (4) of the Election Day Registration process; ask the voter to answer the six "Yes" or "No" eligibility questions

If the voter has a WI Driver License or State ID, entry of the identification number and expiration date is required

Do you have a WI driver license or a WI state identification card?		<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="button" value="More Information"/>
Driver License or State ID	Expiration Date	<input type="radio"/> My WI ID does not have an expiration date.		
J555-9999-2222-03	11/11/2020			

If the voter does not have a WI Driver License or State ID, entry of the last four digits of the voter's social security number is required

Do you have a WI driver license or a WI state identification card?		<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="button" value="+ More Information"/>
Do you have a social security number?		<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="button" value="+ More Information"/>
Last Four Digits of SSN	Confirm Last Four Digits of SSN			
<input type="text" value="7474"/>	<input type="text" value="7474"/>			

NOTE: The elector is still allowed to register even if "No" is selected for both questions as the signature on the form certifies that the individual has neither a driver license/state identification number, nor a social security number

Once all questions are completed, select "Continue to Step 5"

10. Ask the voter to review all information on the Review page. Select "Edit" next to a field if there are any necessary edits. Select "Continue to Step 6"

### Step 5: Review

Voter Name	
Current Name:	<b>John Johnson</b> <input type="button" value="Edit"/>
Date Of Birth:	<b>11/03/1992</b> <input type="button" value="Edit"/>

11. Because the election inspector added a new address, the election inspector will be prompted to Verify New Address. Once the address has been verified against the appropriate district maps, select the Ward, School District, Sanitary District, and Ballot Style. If the address is determined to be located in a reporting unit not served by the polling place, select "Address not served by this polling place", otherwise select "Continue to Step 6"
12. Ask the voter to verify and select the certification statement to accept all stated conditions. Next, the voter should provide their signature in the first yellow box. The election inspector should then sign the second yellow box

Select "Continue to Complete Registration" to finish the Election Day Registration process

13. On the final page, ask the voter if they would like to continue and vote today. If so, select "Continue to Check In" to continue to Photo ID verification. If the voter is registering only, select "Elector does not want to vote, Finish – Next Voter"

## Processing Absentee Ballots (at polling location)

### Processing an Absentee Ballot

1. Read aloud the voter's name and address from the absentee envelope
2. Review the absentee envelope for the voter's signature, the witness's signature, and the witness's address
3. Scroll through the list, identify the correct voter, and select the voter by clicking the radio button next to the voter's name

NOTE: It is possible to process more than one absentee ballot at a time and it is suggested to first place the ballots in alphabetical order; there is a limit of 10 ballots/selections at a time (to help alleviate the potential delay in server processing time and to help expedite this process while maintaining accuracy)

Select	Name	Address
<input type="radio"/>	John Johnson	1087 Chelsey Drive Waukesha, WI 53186

Alternatively, search the list by the voter's name or Mailing ID printed on the absentee label

Last Name <input type="text" value="Johnson"/>	First Name <input type="text" value="John"/>
---	---

Mailing ID <input type="text" value="582456"/>
---

4. Once the voter's name is identified and selected from the list, click "Submit" to process and assign the voter number (be sure to verify the name selected is correct prior to clicking "Submit" – there is **NO WAY** to undo the selection after this point)

5. Verify that the row turns green and that a voter number appears

Voter Number
415a

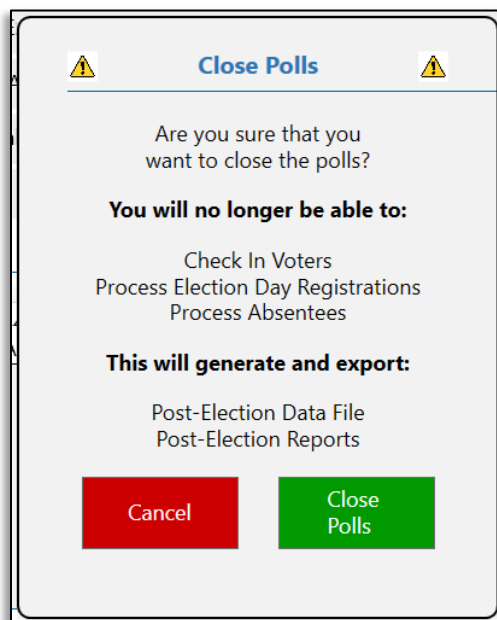
6. Feed the ballot(s) through the tabulator
7. If applicable, complete this process again until all absentee ballots have been processed

## Close Polls

After 8:00 p.m. on Election Day, and after all voters have been checked-in and absentee ballots are processed, you will need to “Close Polls” on the Badger Book. The closing process should be completed using a Server machine. Closing polls on the Badger Book is required for generating participation reports and to export the Badger Book data file.

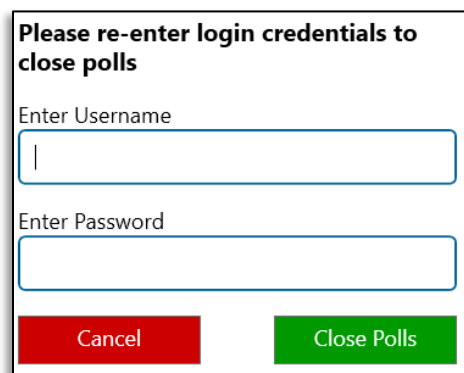
### Close Polls on Election Night (Admin User Only)

1. Go to the Admin menu
2. Click the red “Close Polls” button



A confirmation dialog box titled "Close Polls" with a yellow warning icon on each side. The text inside asks, "Are you sure that you want to close the polls?". Below this, it lists actions that will no longer be possible: "Check In Voters", "Process Election Day Registrations", and "Process Absentees". It also lists what will be generated and exported: "Post-Election Data File" and "Post-Election Reports". At the bottom, there are two buttons: a red "Cancel" button and a green "Close Polls" button.

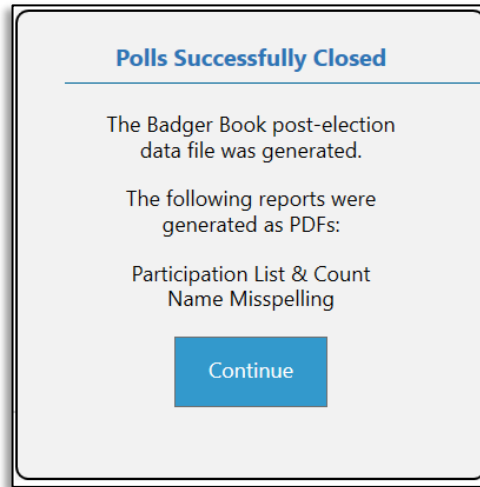
3. Click “Close Polls” on the pop-up warning
4. Reenter your username and password



A form titled "Please re-enter login credentials to close polls". It contains two input fields: "Enter Username" and "Enter Password". Below the fields are two buttons: a red "Cancel" button and a green "Close Polls" button.

5. Click “Close Polls”

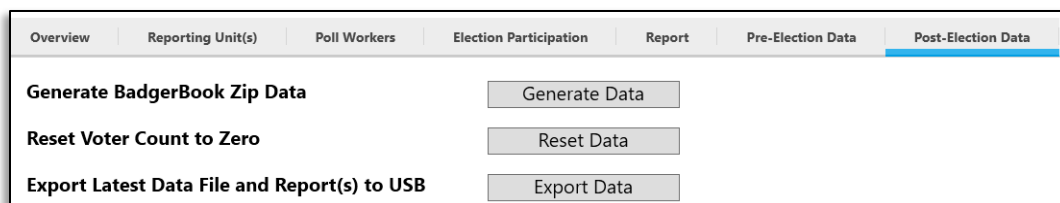
- Click "Continue" on the confirmation window



NOTE: The following steps are for exporting the election data from the Badger Book. This can be done immediately after closing the polls or at a later time.

## Export Post-Election Data File and Reports to USB Device (Admin User Only)

- Select the Post-Election Data tab on the Admin Overview screen
- Plug in dedicated Badger Book USB drive into the base of the server machine



- Select the "Export Data" button next to Export Latest Data File & Report(s) to USB option
- Close the export confirmation window

NOTE: If Badger Book polls are closed prematurely, they can be reopened by following the steps outlined in the Reopen Polls section of this manual. Reopening the polls will not negatively impact any participation, EDRs, or Absentee Ballots previously recorded.

## **Post-Election Day Data Upload (into WisVote)**

After Election Day, the Election Day data (participation, Election Day Registrations, etc.) will be extracted from the Badger Book server and uploaded into WisVote. Traditionally, with paper poll books, these steps were completed through a variety of manual steps. Badger Book provides a more expedient way to complete these processes with a click of a few buttons.

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### **Upload Data File to WisVote**

After the data is extracted from the Badger Book server, election day data can be uploaded into WisVote. Prior to starting this process, copy the Badger Book folder (created when polls were "closed") from the dedicated Badger Book USB drive to your computer.

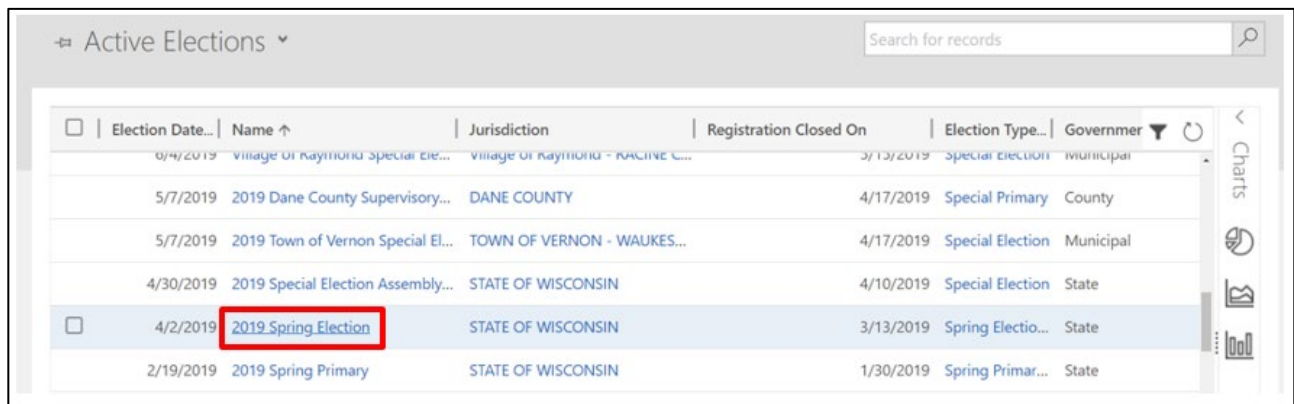
See separate sheet of instructions provided by WEC.

## Badger Book Software Upgrade

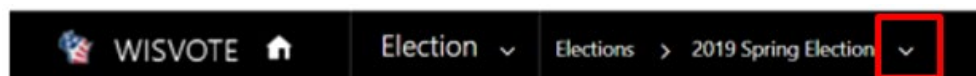
Like all computer software and applications, as improvements and enhancements are made to the Badger Book software, upgrades to the server will be necessary. These software updates can only be made to devices authorized to run the application. This mechanism was created for WEC to expedite the delivery of software updates/upgrades to participating municipalities. This process will require you to copy the software to your dedicated Badger Book USB drive to transfer to the server device (upgrade does not have to be installed on each individual non-server device). **Please only use this when alerted by WEC staff that an update is necessary.**

### Download Software Update – Log into WisVote

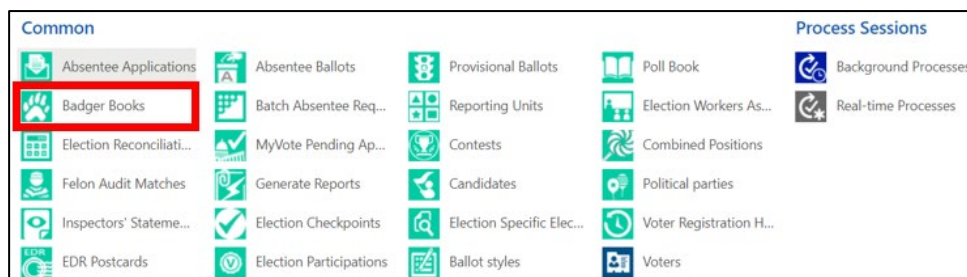
1. Log into WisVote
2. Click the “Elections” tile
3. Choose the last election that you used Badger Books and created a Badger Book record (the default view is “Current Elections” – if the election you want is not displaying, change the view to “Active Elections”)
4. Click the name of the election



5. From the Election Information screen, click the down arrow to access the common tiles



6. Select the Badger Book common tile



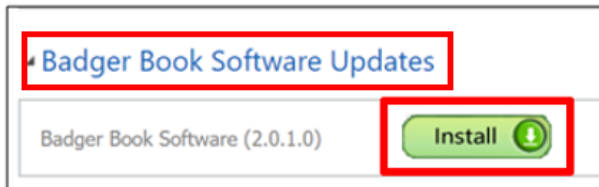


- The Badger Book: Information-Admin screen will appear; click the Badger Book Record from the results



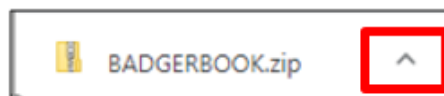
- Scroll to the LAST SECTION on the page titled **Badger Book Software Updates** (remember, this mechanism should only be used to download a Badger Book Software upgrade – do not confuse it with downloading your poll book data file)

- Click "Install"



- As the file is downloading, it will appear in the bottom left hand corner of your screen

Click the up arrow and then click "Show in folder" (upon completion, this will bring you directly to the Downloads folder on your computer)



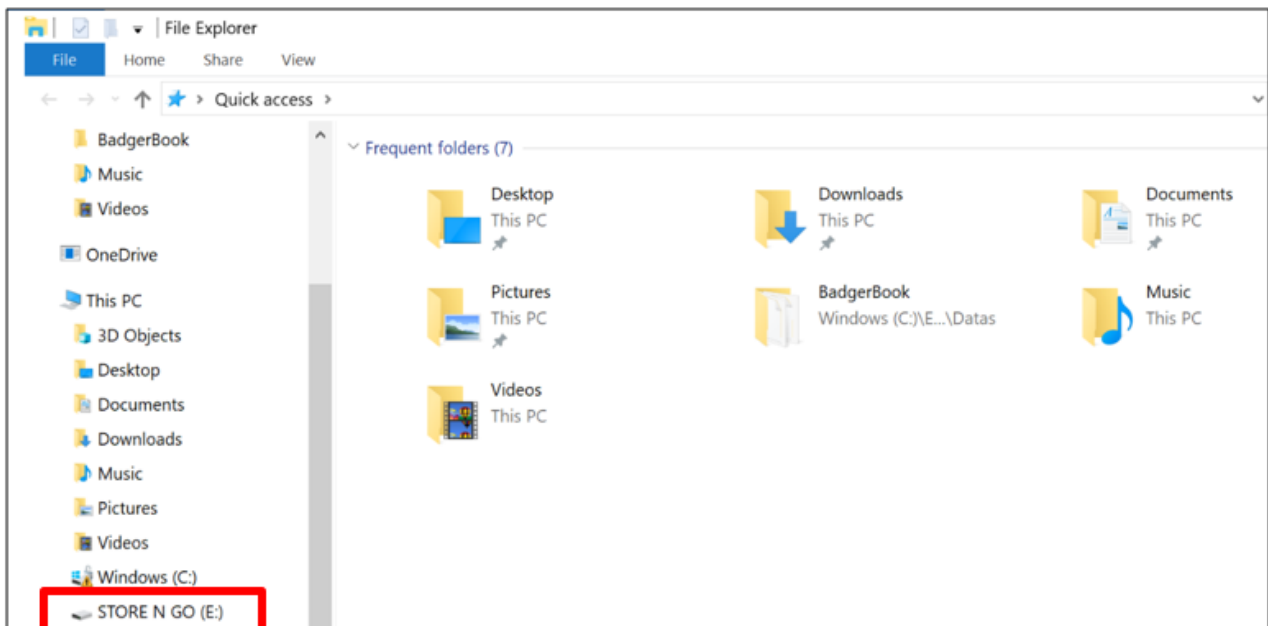
- Copy the BADGERBOOK.zip from the Downloads folder on your computer to the dedicated Badger Book USB device (to prepare it for upload to a Badger Book **server** machine – if you have more than one **server**, than this .zip file will be uploaded to ALL of them) (do NOT copy the file to the BadgerBook folder – if one already exists on the USB drive)

## Download Software Update – Log into a Badger Book Server

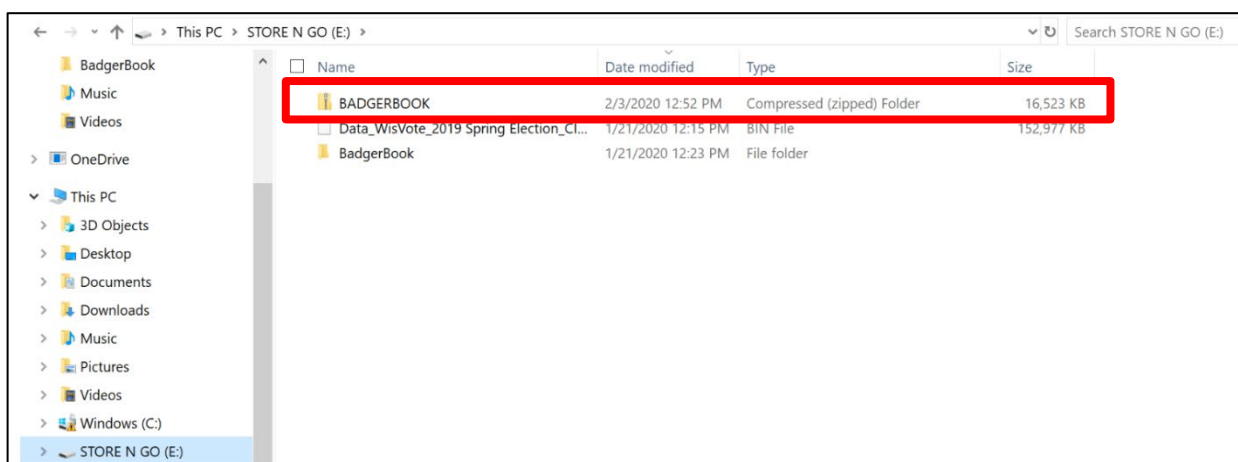
12. Plug the USB drive into the **server** device (also ensure the server is connected to the router)
13. Click on the File Navigation icon from the toolbar on the bottom of the screen



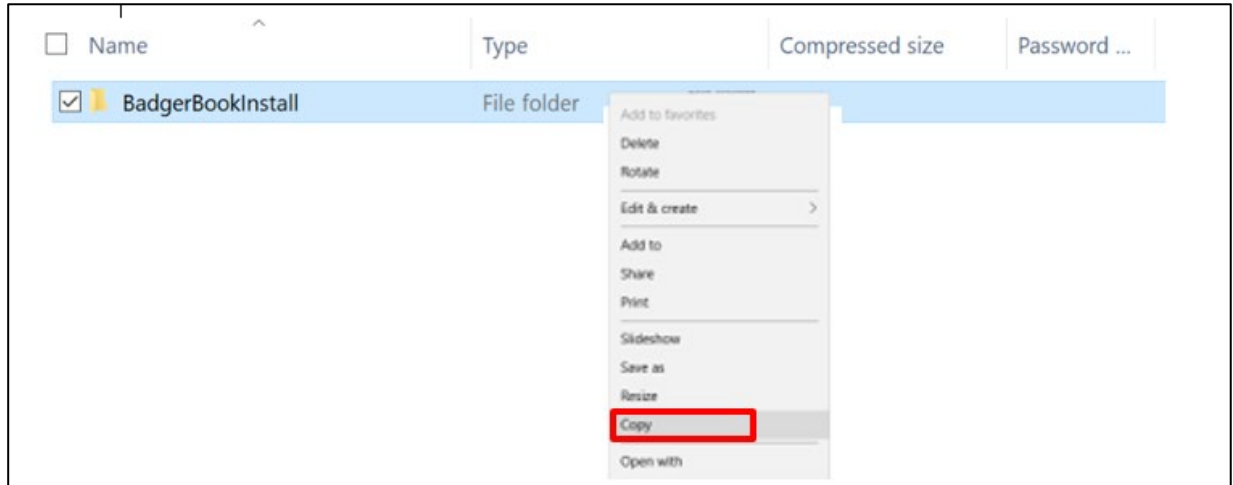
14. To view the contents of the USB device, click on the USB drive icon (this may look a little different based on the USB device being used)



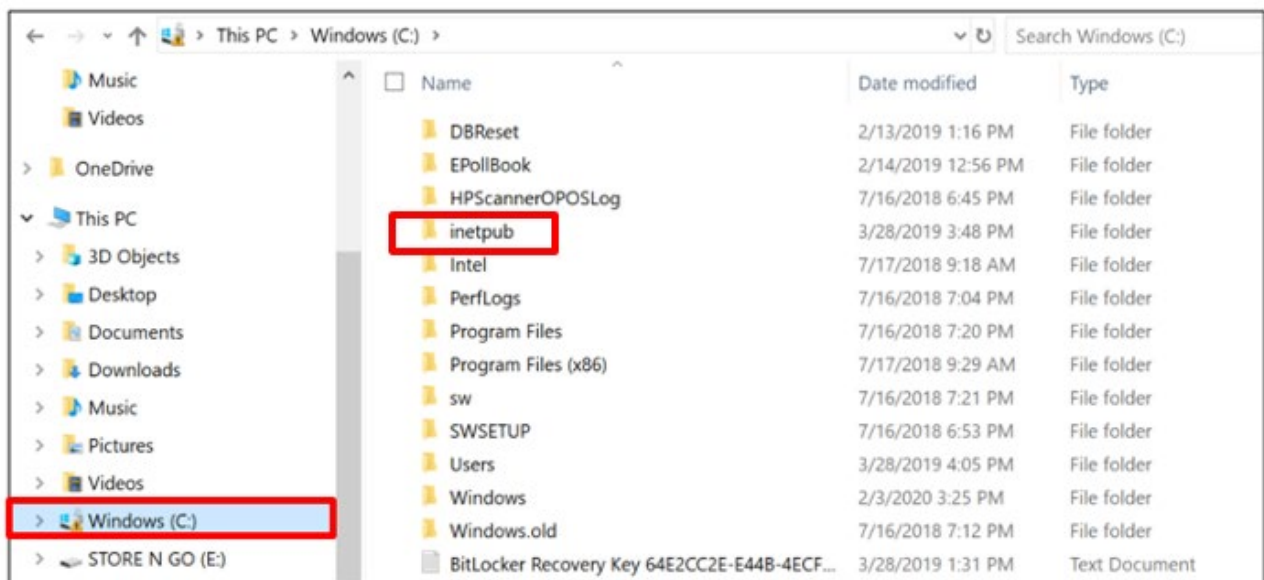
15. From the USB folder, double click on the "BADGERBOOK" (Compressed (zipped) Folder)



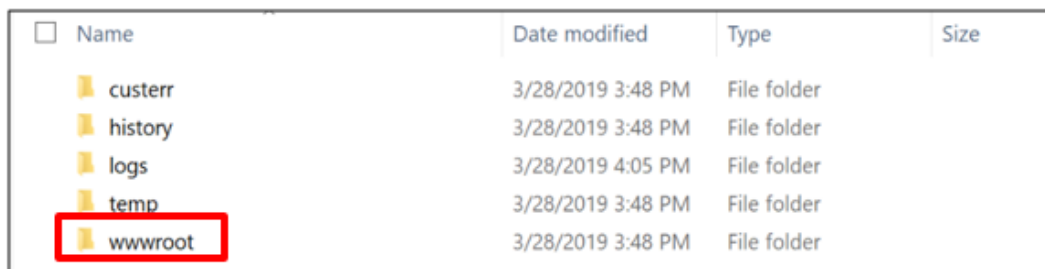
16. A BadgerBookInstall folder will appear; right click on this file and select Copy



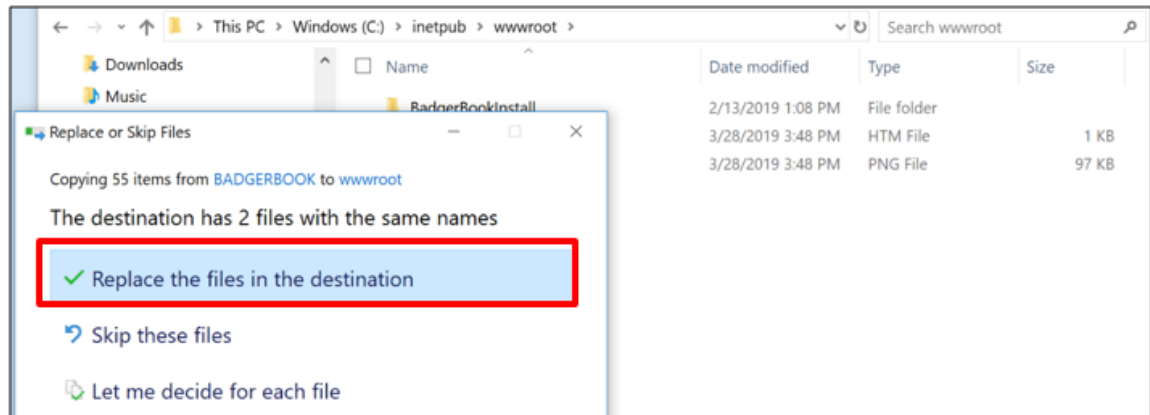
17. To paste the BadgerBookInstall file on the Badger Book Windows C: drive, click "Windows (C:)"; then, double click the "inetpub" folder



18. Double click on the "wwwroot" folder

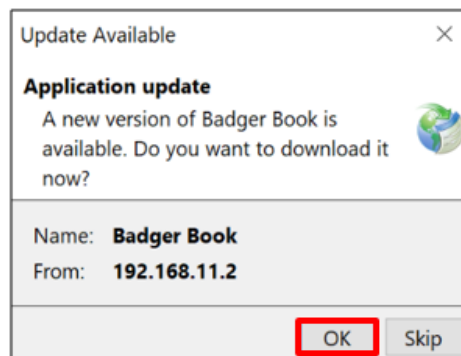


19. Right click and select Paste (this is original file copied from the USB drive); when prompted, click "Replace the files in the destination"

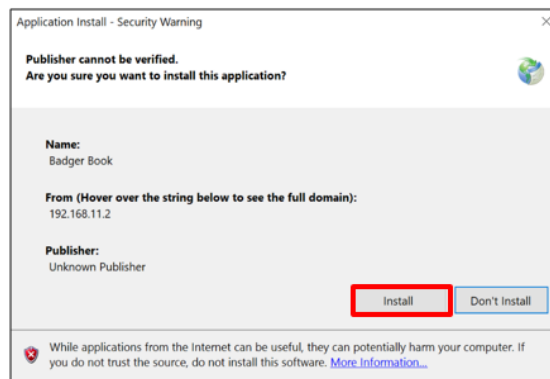


20. After the files are copied and the old version of the software is replaced, close out of the Window Explorer to return to the home screen of the computer; click on the Badger Book icon to open the application

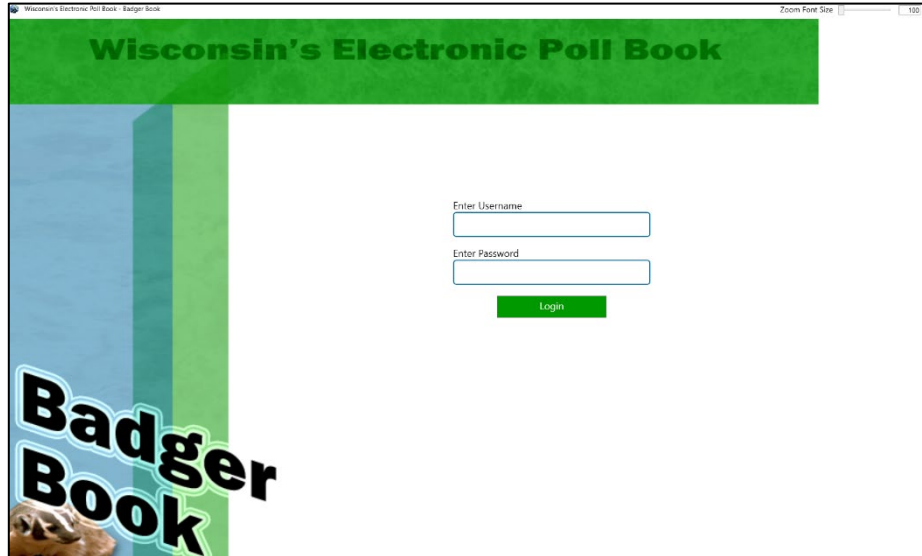
21. An Update Available notification will appear; click "OK" to download a new version of the Badger book software



22. An Application Install – Security Warning will display; click "Install" to install the Badger Book software update



Upon the successful update, the Badger Book application will automatically open to the login screen



NOTE: It is **NOT** necessary to install the software update on each Badger Book machine. When non-server devices or "clients" are connected with an updated server, expect to then be prompted to update each client with a new version of the software

## Contact Information

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For any questions, concerns, and/or issues using the Badger Book, please contact the Wisconsin Elections Commission Help Desk at 608-261-2028 or [elections@wi.gov](mailto:elections@wi.gov).