

# SOSA User Guide

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## SEIMS One-Stop Voting Application

**NC State Board of Elections**

*6/29/2017*

The usage of SOSA for Early Voting is discussed: how to use the applications to search for and vote registrants, how to perform registration updates, and how to perform data transfers.

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# SEIMS ONE-STOP VOTING APPLICATION (SOSA) GUIDE

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## DISCLAIMER

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The data contained in the screenshots of this document is test data and is for demonstration purposes only.

The SEIMS One-Stop voting application (SOSA) is used for early voting at off-site locations. There are 2 different modes that can be used:

**COUNTY:** In the County BOE office

*This mode was formerly known as Connected Only.*

This mode is used if there is an available, stable network connection to the county database server. All activity is performed real-time, and other SEIMS users will be able to see registration changes and absentee voting appear as it happens. This is the mode commonly used if the application is installed on a county workstation with other SEIMS applications already installed.

**LOCAL:**

*This mode was formerly known as Hybrid and Disconnected.*

- Off site (or non-SEIMS office machine) with a reliable connection to the SEIMS Server

This mode is used if there is an available, mostly reliable network connection to the county database server. It allows the user to look up registered voters for the county for a specific election on a local machine; however, any activity performed on the machine is transferred back to the county database server on a periodic basis automatically. This allows the user to continue working should a network connection loss occur. This is the recommended mode in which to operate.

- Off site with no connectivity to the SEIMS Server

This mode is used if there is no available network connection from the satellite voting location to the county database server. It allows the user to look up registered voters for the county for a specific election on a local machine. The user may also perform registration changes and cast votes for registered voters that are allowed to vote in the given election. The activity is stored locally and must be transferred manually on a portable media device through a data file export/import methodology.

This document will describe how to use SOSA. It will also give step-by-step instructions on how to do basic tasks. Generally, the process of voting is the same in all both modes. The only difference is when the data is transferred back and forth between the live database and the One-Stop machines.

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# CHAPTER 1: GETTING STARTED

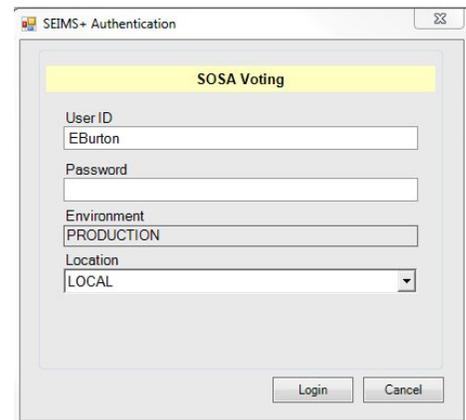
## SECTION 1: OVERVIEW

The SEIMS One-Stop Voting application (SOSA) is used to process in-person early voting at one-stop sites throughout a specific county. This chapter discusses how to access SOSA and prepare for use. Topics discussed are how to login to the application, how to set the voting site, how to set and change system options and how to perform validation. The tasks in this section are usually completed by the SOSA Administrator in office before sending the machines out to the one-stop sites.

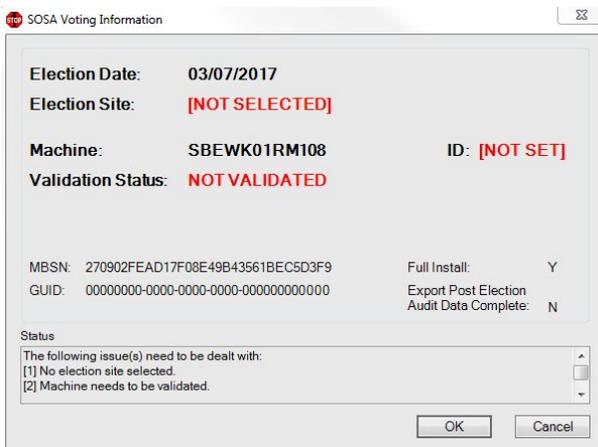
## SECTION 2: LOG-IN PROCEDURE

Use the following steps to start-up and log into the One-Stop Voting application.

1. From the computer desktop, double-click the One-Stop Voting icon and the One-Stop Voting authentication window will appear.
2. Each user must enter their unique username and password for the installed Environment; either 'Production' or 'Training'. Then use the 'Location' drop-down arrow to select 'COUNTY' or 'LOCAL' depending on the county preference. Click the 'Login' button to login to SOSA, or click the 'Cancel' button to cancel the login. Click 'Login'. Voting Information popup appears. If the site and location match, click the 'OK' button.



If the SOSA Voting Information popup below left appears with the information shown in red, refer to the **SOSA Administrator Guide** to select an Election Site and Validate the machine.



Election Date:	03/07/2017		
Election Site:	[NOT SELECTED]		
Machine:	SBEWK01RM108	ID:	[NOT SET]
Validation Status:	NOT VALIDATED		
MBSN:	270902FEAD17F08E49B43561BEC5D3F9	Full Install:	Y
GUID:	00000000-0000-0000-0000-000000000000	Export Post Election Audit Data Complete:	N

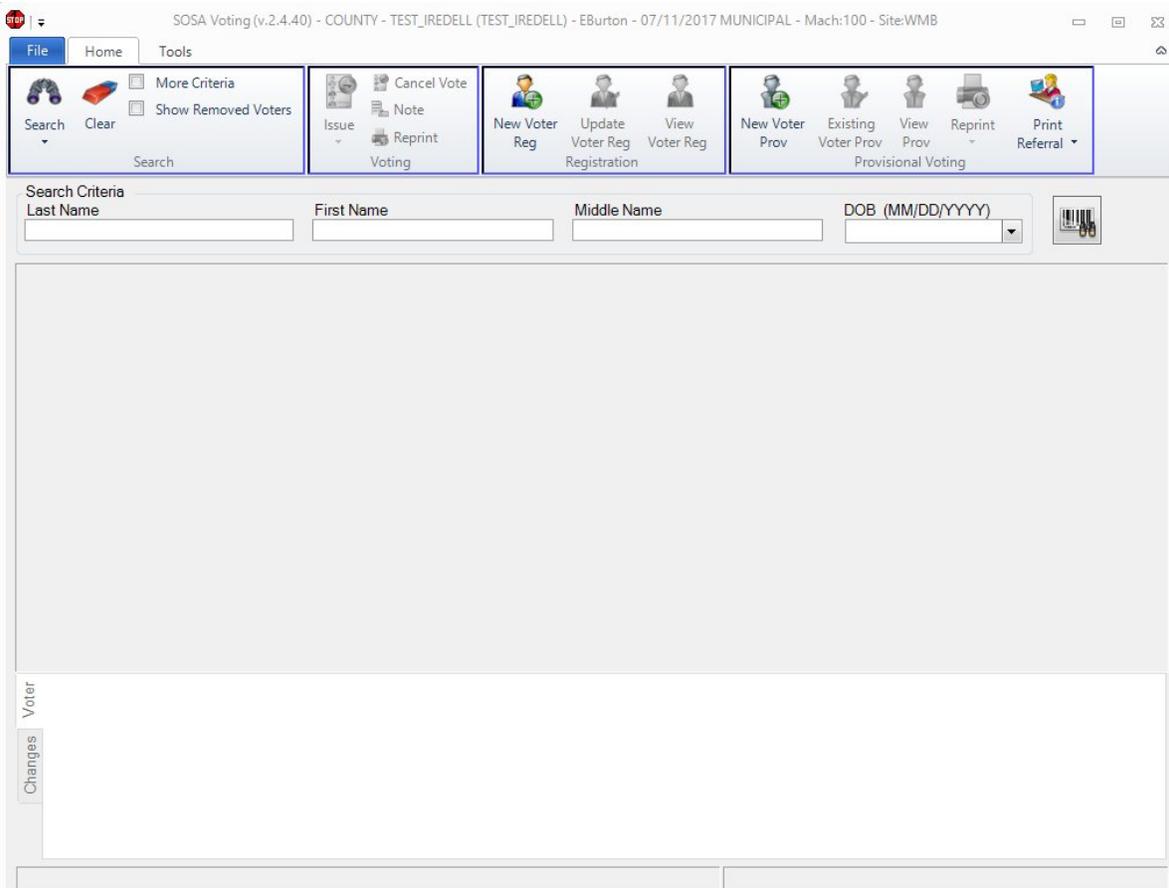
Status  
The following issue(s) need to be dealt with:  
[1] No election site selected.  
[2] Machine needs to be validated.



Election Date:	03/07/2017		
Election Site:	PENINSULA BAPTIST CHURCH		
Machine:	SBEWK01RM108	ID:	108
Validation Status:	VALIDATED		
Validation Date:	1/27/2017 1:29:43 PM		
MBSN:	270902FEAD17F08E49B43561BEC5D3F9	Full Install:	Y
GUID:	1eb99f8a-9f11-485f-a4a2-f5682cf1feac	Export Post Election Audit Data Complete:	N

Status  
No current Issues.

### 3. The main screen appears.



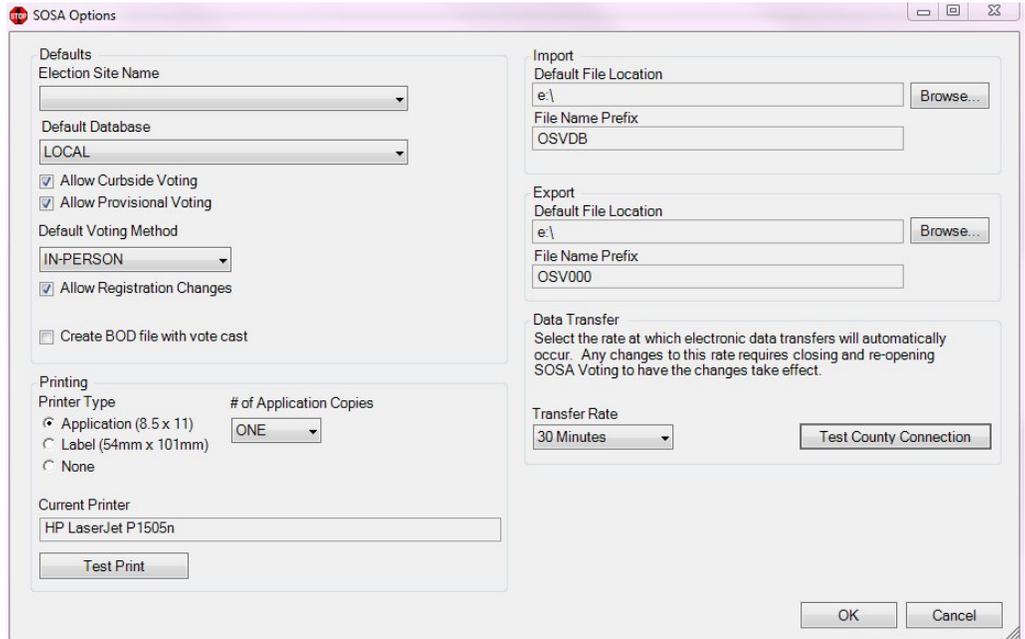
The SOSA Voting application's title bar displays the following information, as shown in the image below:

SOSA Voting (v.2.4.40) - LOCAL (one\_stop) - EBurton - 07/11/2017 MUNICIPAL - Mach:100 - Site:WMB

- Application Name and software version: SOSA Voting (v.2.4.40)
- Connection Type: Local
- Database name: one\_stop
- User Login Name: eburton
- Election Date and Name: 07/11/2017 Municipal
- Machine Number: 100
- Voting Site: WMB

## SECTION 3: SOSA OPTIONS

SOSA has several different settings that can be used to optimize the application according to the county needs. Most of these options should have been set by the administrator, but those settings may be changed if the situation warrants it. To open the options screen, click on the *Tools* → *Options* menu item in SOSA. The screen to the right will display.



The SOSA options are described below.

### ONE-STOP SITE PROPERTIES

#### Defaults

<b>Election Site Name</b>	Indicates the one-stop site to which this machine is assigned.
<b>Default Database</b>	Sets the default database connection: COUNTY or LOCAL
<b>Allow Curbside Voting</b>	Controls whether or not curbside voting is allowed in the application.
<b>Allow Provisional Voting</b>	Enables Provisional voting functionality in the application.
<b>Default Voting Method</b>	Sets the default voting method, which can be 'In-Person' or 'Curbside'.
<b>Allow Registration Changes</b>	Controls whether or not registration changes are allowed in the application.
<b>Create BOD file with vote cast</b>	Allows the creation of a BOD (Ballot on Demand) data file when the vote button is selected.

#### Printing

<b>Printer Type</b>	Sets the type of paper to print documents within SOSA. Forms can be printed on a standard printer (Application 8.5x11), a Smart Label Printer (Label 54mm x 101mm) or nothing at all (None). If standard paper is not selected, the SOSA reports will not be available.
<b># of Application copies</b>	Set the number of copies of the absentee application to print. One to five copies of the Absentee Application can be printed. <i>One</i> is the default.
<b>Current Printer</b>	Only displays the default printer for the machine. To change this, the user must change the default printer in Windows.

## ONE-STOP SITE PROPERTIES

**Test Print** The function allows the user to send a test page to the default printer to make sure it is working correctly.

**Enable Print Preview** *This option is only available when running SOSA against a Training database (instead of Production).* This will allow all documents that normally go straight to the printer, to preview on-screen. A print button is available on the preview window if it is decided to actually print the document. This will help save paper during training sessions.

### Import

**Default File Location** Allows the user to change the default location SOSA uses to find import (**Transfer Data to/from BOE**) files. Click the Browse button to select a different file location.

**File Name Prefix** Only displays the import file name prefix. All import files should start with the characters OSVDB.

### Export

**Default File Location** Allows the user to change the default location SOSA uses to place export (Transfer Data to/from BOE) files. Click the Browse button to select a different file location.

**File Name Prefix** Only displays the export file name prefix. All export files will begin with the characters **OSV**.

### Data Transfer Time Intervals (for Electronic transfers)

**Transfer Rate** Sets the time interval in which SOSA Electronic transfers occur.

**Test County Connection** LOCAL Mode only: Tests whether or not SOSA can connect to the county server.

# CHAPTER 2: SEARCHING

## SECTION 1: OVERVIEW

In SOSA, searching is the critical function needed to find the voter who wishes to participate in early voting. It is used to look registered voters up to be able to process votes, registration changes, or even look up their current information.

## SECTION 2: SOSA MAIN SCREEN

Below is the main SOSA Voting screen. The top section of the screen displays all of the criteria fields available for searching. The center of the screen displays the search results in a grid, and the bottom section displays registration and/or vote information for a selected voter. All of the buttons available for specific One-Stop tasks appear along the top of the screen. An explanation of the available functions can be found in the table below.

The screenshot shows the SOSA Voting application interface. At the top, there is a menu bar with 'File', 'Home', and 'Tools'. Below the menu bar is a toolbar with various icons and numbered buttons (1-16) for different functions like 'Search', 'Clear', 'More Criteria', 'Show Removed Voters', 'Issue', 'Note', 'Reprint', 'Voting', 'New Voter Reg', 'Update Voter Reg', 'View Voter Reg', 'New Voter Prov', 'Existing Voter Prov', 'View Prov', 'Reprint', and 'Print Referral'. Below the toolbar is a search criteria section with input fields for 'Last Name' (containing 'MADISON'), 'First Name', 'Middle Name', and 'DOB (MM/DD/YYYY)'. Below the search criteria is a table of 'Potential Voters (19 rows)'. The table has columns for Name, Address, Mail Addr, Ballot Style, Party, Gender, Race, and DOB. The first row is selected, showing 'MADISON, BRADLEY KEITH' with address '195 EVERETT PARK DR MOORESVILLE, NC 28115'. Below the table is a detailed view of the selected voter, showing 'Voter' information: 'VRN: 000009846330 ACTIVE CC3/CC3', 'MADISON, BRADLEY KEITH', and '195 EVERETT PARK DR MOORESVILLE, NC 28115'. A green checkmark is visible next to the voter information.

Name	Address	Mail Addr	Ballot Style	Party	Gender	Race	DOB
MADISON, BRADLEY KEITH	195 EVERETT PARK DR MOORESVILLE, NC 28115		G014	REP	MALE	WHITE	07/07/1979
MADISON, CARL EUGENE	222 RED HAWK LN OLIN, NC 28660		G006	REP	MALE	WHITE	01/06/1961
MADISON, CATHLEEN JENSEN	154 LEVO DR TROUTMAN, NC 28166		G007	UNA	FEMALE	WHITE	03/09/1952
MADISON, CLAUDE D JR	2661 FINES CREEK DR STATESVILLE, NC 28625	X	G011	REP	MALE	WHITE	08/08/1943
MADISON, CYNTHIA YORK	2100 S CHIPLEY FORD RD STATESVILLE, NC 28625		G003	REP	FEMALE	WHITE	07/02/1959
MADISON, DAVID JEREMY	138 CASTLETON DR MOORESVILLE, NC 28117		G014	UNA	MALE	WHITE	11/27/1991
MADISON, EARL KENT	2338 JENNINGS RD OLIN, NC 28660		G006	REP	MALE	WHITE	08/26/1955
MADISON, ELIZABETH ANN	1413 OLD MOCKSVILLE RD STATESVILLE, NC 28625		G006	REP	FEMALE	WHITE	10/23/1951
MADISON, EMILY ELIZABETH	195 EVERETT PARK DR MOORESVILLE, NC 28115		G014	REP	FEMALE	WHITE	05/02/1982
MADISON, GLENDA MARIE	530 OLIN LOOP OLIN, NC 28660		G006	DEM	FEMALE	WHITE	01/16/1940
MADISON, JONATHAN WILLIAM	2314 SCALYBARK RD STATESVILLE, NC 28625		G011	REP	MALE	WHITE	11/15/1980
MADISON, JOSEPH ALLEN	3387 HARMONY HWY HARMONY, NC 28634	X	G006	REP	MALE	WHITE	08/06/1976
MADISON, KATHLEEN JEAN	138 CASTLETON DR MOORESVILLE, NC 28117		G014	DEM	FEMALE	WHITE	11/23/1954
MADISON, KATHRYN ELIZABETH	2314 SCALYBARK RD STATESVILLE, NC 28625		G011	UNA	FEMALE	WHITE	01/05/1980
MADISON, MATTHEW DONALD	130 MINYARD LN STATESVILLE, NC 28677		G010	REP	MALE	WHITE	02/17/1973

Voter  
Changes

VRN: 000009846330 ACTIVE CC3/CC3  
MADISON, BRADLEY KEITH  
195 EVERETT PARK DR  
MOORESVILLE, NC 28115

## SOSA SCREEN FUNCTIONALITY

#	Button Name	Description
1	<b>Search</b>	Initiates the search of the county database for potential voters based on the criteria entered and displays the results in the Potential Voters grid. Current search return limit is 500 records.
2	<b>Clear</b>	Clears all fields of data
3	<b>More Criteria</b>	Displays address fields for searching
4	<b>Show Removed Voters</b>	Allows the user to toggle whether or not Removed/Denied voters appear in the search results
5	<b>Issue</b>	Initiates the vote process for the selected voter from the Potential Voters grid (see <a href="#">Chapter 3 Section 2</a> ). Has drop-down for In-Person and Curbside if SOSA Option is set to “Allow Curbside Voting”.
6	<b>Cancel Vote</b>	Opens the Cancel Vote screen to cancel a vote performed on the same machine in error.
7	<b>Note</b>	Opens the Note screen to begin adding a note to the voter’s absentee vote information.
8	<b>Reprint</b>	Allows the user to reprint the voter application to the designated printer.
9	<b>New Voter Reg</b>	Opens the New Registration screen to register and vote a Same Day (IPR) registrant
10	<b>Update Voter Reg</b>	Opens the Edit Registration screen to begin editing voter information that has been provided with a voter application.
11	<b>View Voter Reg</b>	Opens the Voter Registration screen in read-only mode so the user can review the voter information in detail.
12	<b>New Voter Prov</b>	Allows a new provisional voter to be added (non-existing registrant).
13	<b>Existing Voter Prov</b>	Allows adding a provisional vote to an existing registered voter.
14	<b>View Prov</b>	Allows viewing the provisional vote entered on this machine.
15	<b>Reprint</b>	Allows the reprinting of Provisional forms to the designated printer.
16	<b>Print Referral</b>	Allows the printing of a blank Help Referral Form or a pre-populated form for a selected voter.

### SECTION 3: VOTER SEARCH

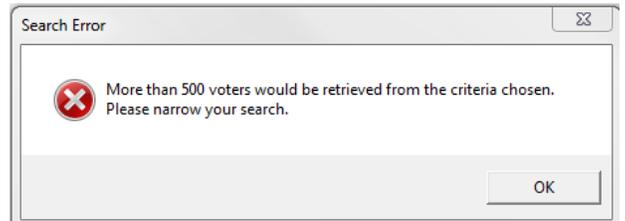
In the Search Criteria section of the SOSA main screen, there are criteria fields that may be used to find a specific voter. The default search fields are Last Name, First Name, Middle Name and DOB (MM/DD/YYYY). To display address search fields of House #, Dir, Street Name, Type, Suffix, Unit, City, State, and Zip Code, simply click the ‘More Criteria’ checkbox on the Home ribbon. The user may use any combination of the search criteria fields. Using a combination of search options will return more defined results in the Potential Voters Grid. A wild card (%) may be used in the name fields to allow for find a variety of potential matches, especially if the spelling of the name is not known. Any results found will be displayed within the Potential Voters grid found below the Search Criteria section.

The below example shows the steps to a simple name search:

1. Enter the voter's last name in the 'Last Name' field, e.g. "SMITH". If the user is unsure of the spelling of the voter's last name (SMITH vs. SMYTH), the wildcard symbol (%) can be used to ensure all spellings of the name are located (e.g. "SM%TH").
2. Enter the voter's first name in the 'First Name' field, e.g. "DAISY".
3. Click 'Search' or press 'Enter'. Alternatively, click the Barcode Scan icon to the right of the DOB field to scan an NCDL barcode from a voter's driver's license which will prevent the need for manual data entry in the search fields.



A search on just a voter's last name can be used. However, to speed up the search and reduce the number of voters located, it is best to use both the first and last name of the voter. If more than 500 results are going to be returned, a message displays to narrow the search. Click 'OK' to clear the message and begin the search again.



The results will populate in the Potential Voters section of the main screen, as shown below.

Search Criteria

Last Name: PARKER      First Name:      Middle Name:      DOB (MM/DD/YYYY):

Potential Voters (267 rows)

Name	Address	Mail Addr	Ballot Style	Party	Gender	Race	DOB
PARKER, AARON THOMAS	185 GUN CLUB RD STONY POINT, NC 28678		G009	REP	MALE	WHITE	09/04/1987
PARKER, ADAM MACRAE	525 FAITH RD MOORESVILLE, NC 28115		G014	REP	MALE	WHITE	05/04/1979

If the voter's name **cannot** be found, try the following:

- Verify the spelling of the name.
- Verify there is no name change.
- Search using only a portion of the voter's last name and first name, such as the first few letters and add the wildcard symbol (%) at the end.  
**Example:** 'Last Name': "SM%" 'First Name': "D%", this will find all voters with last names beginning with "SM", and first names beginning with "D".
- Search using other criteria fields instead, such as 'Street Name' or 'DOB (MM/DD/YYYY)'. The 'More Criteria' and 'Show Removed Voters' check boxes on the Home tab will give you more search options.

If the voter cannot be found, follow the process defined by the County Board of Elections. The voter may need to vote a Provisional ballot.

## SECTION 4: VOTER INFORMATION OVERVIEW

Upon performing a successful search that returns a list of voters, the SOSA main screen will display that list of voters within the Potential Voters grid, along with any provisional records entered on the machine; a sample of which is shown below. Each voter record will display the information as defined in the grid below.

Potential Voters (21 rows)							
Name	Address	Mail Addr	Ballot Style	Party	Gender	Race	DOB
TATE, ALAN DEAN	155 LONGWOOD DR STELLA, NC 28582		NO BALLOT	REP	MALE	WHITE	12/24/1962
TATE, ANDREA PATRICIA	1 A ST CAMP LEJEUNE, NC 28542	X	G004	DEM	FEMALE	BLACK O	03/17/1992
TATE, BARBARA THOMPSON	111 LINDA LOOP JACKSONVILLE, NC 28546		G004	DEM	FEMALE	BLACK O	08/06/1959
TATE, BRITNEY LYNN	415 JOHN DEER CT RICHLANDS, NC 28574		NO BALLOT	REP	FEMALE	WHITE	09/23/1947
TATE, CAROLYN	1241 ONSLOW PINES RD JACKSONVILLE, NC 28540		NO BALLOT	UNA	FEMALE	WHITE	05/03/1994
TATE, CONSTANCE	2022 TARAWA BLVD TARAWA TERRACE, NC 28543		G004	UNA	FEMALE	WHITE	06/18/1927
TATE, DARRELL LENIER	500 TOWER DR JACKSONVILLE, NC 28546		NO BALLOT	DEM	MALE	BLACK O	01/17/1962
TATE, DARRELL LENIER JR	500 TOWER DR JACKSONVILLE, NC 28546		NO BALLOT	DEM	MALE	BLACK O	02/04/1936
TATE, JEFFREY DAVID	210 PORT SIDE DR SNEADS FERRY, NC 28460		NO BALLOT	UNA	MALE	WHITE	05/01/1974
TATE, JENNIFER LEANN	915 MORGANER DR SHWANSBORO, NC 28584		G007	UNA	FEMALE	WHITE	08/24/1984
TATE, JOHN DELACY	111 LINDA LOOP JACKSONVILLE, NC 28546		G004	DEM	MALE	BLACK O	02/15/1959
TATE, KENNETH ALLAN	210 PORT SIDE DR SNEADS FERRY, NC 28460		NO BALLOT	UNA	MALE	WHITE	06/23/1931
TATE, KENNETH HAROLD II	104 RAVENWOOD DR # C JACKSONVILLE, NC 28546		G004	UNA	MALE	OTHER	10/14/1980
TATE, LORENZA NORRIS JR	507 LAKEWOOD DR JACKSONVILLE, NC 28546		G004	UNA	MALE	BLACK O	03/16/1939
TATE, MICHAEL ARTHUR	204 EGRET POINT DR SNEADS FERRY, NC 28460		NO BALLOT	UNA	MALE	WHITE	05/07/1982
TATE, RACHEL ELIZABETH	130 ABERDEEN LN JACKSONVILLE, NC 28540		NO BALLOT	UNA	FEMALE	WHITE	01/21/1984
TATE, RODNEY QUINTELL	507 LAKEWOOD DR JACKSONVILLE, NC 28546		G004	UNA	MALE	BLACK O	10/28/1958
TATE, SANDRA ANA-MARIE	500 TOWER DR JACKSONVILLE, NC 28546		NO BALLOT	UNA	FEMALE	TWO OR	03/25/1955
TATE, SANTINA MARIE	500 TOWER DR JACKSONVILLE, NC 28546		NO BALLOT	DEM	FEMALE	BLACK O	09/02/1933
TATE, TIMOTHY NICHOLAS	126 W BAYSHORE BLVD JACKSONVILLE, NC 28540		G004	UNA	MALE	WHITE	08/03/1950
TATE, TRACEY ANN	126 W BAYSHORE BLVD JACKSONVILLE, NC 28540		G004	REP	FEMALE	WHITE	11/03/1963

### POTENTIAL VOTERS GRID COLUMN DEFINITIONS

#	Column Name	Description
1	<b>Name</b>	The full name of the registered or provisional voter presented as last name first.
2	<b>Address</b>	The residential address of the registered or provisional voter.
3	<b>Mail Addr</b>	Indicates with an X that the registrant or provisional voter has a mailing address.
4	<b>Ballot Style</b>	The ballot style of the registered or provisional voter.
5	<b>Party (Voted Party)</b>	Displays the registrant or provisional voter's registered party and party voted
6	<b>Gender</b>	The gender of the registered or provisional voter.
7	<b>Race</b>	The race of the registered or provisional voter.
8	<b>DOB</b>	The date of birth of the registered or provisional voter.

**Note:** Do **NOT** give a voter's date of birth to another person for any reason, as by law, this information is confidential!

When a voter's record is selected, additional information for the selected voter will appear at the bottom of the window on the Voter tab.

### VOTER INFORMATION PANEL

The Voter Information Panel displays information about the selected voter's registration, separated into the Voter tab and the Changes tab. The voter's registration information appears on the left side of the Voter tab and the voter's vote status appears on the right side of the Voter tab. If the selected voter has previous vote

activity for the current election, information will display; if they have no activity, the area will be empty. If any registration changes have been made to the selected registrant, they will appear on the Changes tab.

SOSA Voting (v.2.3.22) - COUNTY - UAT\_IJREDELL (UAT\_IJREDELL) - eburton - 11/08/2016 GENERAL - Mach:100 - Site:LOB

File Home Tools

Search Clear Search

More Criteria Show Removed Voters

Issue Note Reprint Voting

New Voter Reg Update Voter Reg View Voter Reg Registration

New Voter Prov Existing Voter Prov View Prov Provisional Voting Reprint Print Referral

Search Criteria

Last Name: BURTON First Name: Middle Name: DOB (MM/DD/YYYY):

Potential Voters (62 rows)

Name	Address	Mail Addr	Ballot Style	Party	Gender	Race	DOB
BURTON, ALONZO JR	1013 WALL ST STATESVILLE, NC 28677		G012	DEM	MALE	BLACK OR	02/01/1945
BURTON, AMANDA PATE	126 COCO LN STATESVILLE, NC 28625		G003	UNA	FEMALE	WHITE	10/14/1983
BURTON, ANNIKA SHEREE	128 BURKE CIR MOORESVILLE, NC 28115		G014	DEM	FEMALE	BLACK OR	10/11/1980
BURTON, BARBARA LEE	368 CHESTNUT GROVE RD STATESVILLE, NC 28625		G006	UNA	FEMALE	WHITE	06/18/1970
BURTON, BETTY JEAN	380 MEDLIN ST STATESVILLE, NC 28677		G011	DEM	FEMALE	BLACK OR	09/01/1940
BURTON, BETTY WILLIAMS	323 CALDWELL AVE MOORESVILLE, NC 28115		G014	DEM	FEMALE	WHITE	04/04/1932
BURTON, BRANDI NICHOLE	150 LIPPARD FARM RD STATESVILLE, NC 28625		G009	UNA	FEMALE	WHITE	10/09/1983
BURTON, CAROLYN S	2175 DEER VIEW CIR # 601 STATESVILLE, NC 28625		G011	DEM	FEMALE	BLACK OR	05/02/1945
BURTON, CATHY WOODS	109 BEACH LN MOORESVILLE, NC 28117		G014	REP	FEMALE	WHITE	05/26/1953
BURTON, CHARLES FLOYD III	1108 CLAY ST STATESVILLE, NC 28677		G012	DEM	MALE	BLACK OR	09/25/1980
BURTON, CLYDE PAUL JR	109 BEACH LN MOORESVILLE, NC 28117		G014	REP	MALE	WHITE	07/26/1953
BURTON, CONSTANCE LEE	276 OVERHEAD BRIDGE RD MOORESVILLE, NC 28115		G014	DEM	FEMALE	WHITE	07/21/1945
BURTON, CRAIG RAYMOND	129C IRVING AVE MOORESVILLE, NC 28117		G014	REP	MALE	WHITE	12/24/1983
BURTON, CURTIS AUSTIN	128 LIPE RD TROUTMAN, NC 28166		G007	REP	MALE	WHITE	09/18/1990
BURTON, DARIN KEITH	388 E WILSON AVE MOORESVILLE, NC 28115		G014	UNA	MALE	WHITE	05/03/1970
BURTON, DARREN DOUGLAS JR	1313 SCHOOL ST STATESVILLE, NC 28677	X	G010	DEM	MALE	BLACK OR	02/08/1965
BURTON, DARRIUS R	1313 SCHOOL ST STATESVILLE, NC 28677		G010	DEM	MALE	BLACK OR	02/08/1965
BURTON, DEANNA B	821 PARK DR STATESVILLE, NC 28677		G010	UNA	FEMALE	BLACK OR	06/09/1966
BURTON, DELLA MARIE	324 W MCNEELY AVE # F MOORESVILLE, NC 28115		G014	REP	FEMALE	WHITE	01/23/1954

Descriptions of the registered voter's information and when it is displayed, as well as a magnified version of the panel, is presented below.

Voter

VRN: 000001184200 ACTIVE ST6/ST6

BURTON, ALONZO JR

1013 WALL ST  
STATESVILLE, NC 28677

Changes

### Magnified Voter Information Panel

#### INFORMATION THAT APPEARS IN THE VOTER INFORMATION PANEL

Tab	Type	Condition	Value
Voter (left)	VRN	Appears when the voter is a registered voter. New registrants will have a blank value.	Displays the voter's voter registration number in the county.
Voter (left)	Name	Always displays.	Displays voters' name as: Last Name, First Name, Middle Name
Voter (left)	Address	Always displays. Mailing address will display if Mail Addr column contains an X.	Displays voters' residential address.
Voter (left)	PCT/VTD	Always displays.	Displays the Precinct and VTD associated with the voters' registered residential address.
Voter (left)	Status	Always displays.	Displays the current status of the registered voter: Active, Inactive, Removed, Denied,

			Temporary
<b>Voter (right)</b>	<b>No Ballot</b>	Red exclamation triangle icon displays indicating the selected registrant has no ballot for the election.	No Ballot Style 
<b>Voter (right)</b>	<b>Can Vote</b>	Green checkmark icon displays indicating the selected registrant is eligible to vote.	Green check mark 
<b>Voter (right)</b>	<b>Voted</b>	Displays red exclamation triangle icon when a voter presents themselves to vote when they have previously voted in the current election--if the "Prevent users from votes/updates once vote is cast" option is left unchecked when the wizard is run.	Voted 
<b>Voter (right)</b>	<b>Voted</b>	Displays black and red "no" icon when a voter presents themselves to vote when they have previously voted—if the "Prevent users from votes/updates once vote is cast" option is checked when the wizard is run.	Voted 
<b>Voter (right)</b>	<b>Cannot Vote</b>	Displays when a voter presents themselves to vote and they are in a Removed or Denied status. Black and red "no" icon displays.	Removed/Denied Voter 
<b>Voter (right)</b>	<b>Return</b>	Envelope icon displays indicating that a By-mail absentee ballot has been returned to the One-Stop site.	Return Processed 
<b>Voter (right)</b>	<b>ID Validation</b>	ID icon displays when the voter is flagged as needing to provide HAVA ID.	Indicates that the voter must provide Proof of ID before voting. 
<b>Voter (right)</b>	<b>Inactive Voter</b>	Address book and red exclamation triangle icons display when a voter presents themselves to vote after their status changed to Inactive.	Indicates that the voter's registration information must be verified before voting may occur. 
<b>Voter (right)</b>	<b>Note</b>	Note icon displays if there is a note on the selected voters record.	Note 
<b>Voter (right)</b>	<b>Provisional Voter</b>	Provisional icon displays when a record was logged as a provisional voter.	Indicates that the potential voter voted as a Provisional 
<b>Voter (right)</b>	<b>Election Date</b>	Populates with the current election information after the Vote button is clicked.	Displays the election date in mm/dd/yyyy format.
<b>Voter (right)</b>	<b>Voted Date</b>	Populates with the date that the voter presented themselves to vote after the Vote button is clicked.	Displays the date voted in mm/dd/yyyy format.
<b>Voter</b>	<b>Ballot Style</b>	Populates with the Ballot Style assigned to the	Displays the ballot style the voter should

<b>(right)</b>		voter after the Vote button is clicked.	have received.
<b>Voter (right)</b>	<b>PCT/VTD</b>	Populates with the precinct and VTD information linked to the address after the Vote button is clicked.	Displays the precinct and VTD related to the ballot cast.
<b>Voter (right)</b>	<b>Ballot ID</b>	Populates with the Ballot ID associated with the voters' record after the Vote button is clicked.	Displays the ballot id, which is made up of machine abbreviation and a unique ballot number for that machine (e.g. 101-56).
<b>Voter (right)</b>	<b>Appl. Num</b>	Populates with the Application No. after the Vote button is clicked.	Displays the application number of the one-stop vote, which is made up of request type (this will always be "OS"), voting place, machine number, and a sequence number (e.g. OS-OFF-101-98).
<b>Voter (right)</b>	<b>Action</b>	Populates when a voter has successfully cast a ballot.	VOTED
<b>Changes</b>	<b>Name Change</b>	Displays if a Name Change was made to the selected registrant.	Displays Name Change From/To when a name change is made
<b>Changes</b>	<b>Address Change</b>	Displays if an Address Change was made to the selected registrant.	Displays Address Change From/To when an address change is made
<b>Changes</b>	<b>PCT/VTD Change</b>	Displays if a Precinct/VTD Change was made to the selected registrant.	Displays PCT/VTD Change From/To if a precinct change is made

## CHAPTER 3: ONE-STOP AND PROVISIONAL VOTING PROCESS

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### SECTION 1: OVERVIEW

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The primary purpose of SOSA is to incorporate all the rules and manage the one-stop voting process within a given county. This chapter will detail all phases of the voting process, including how to vote a registrant, how to cancel a vote, how to use the re-vote function (if allowed by the CBE), how to add a note to a voter, and how to reprint an application. SOSA also allows Provisional Voter information to be entered, removing the need for the manual provisional process at One-Stop sites.

One-Stop voting exists to allow registered voters to vote in-person at specific designated voting places during a short time period between the registration cutoff for an election and the election itself. The major distinguishing factor between one-stop voting and Election Day voting is that one-stop ballots are retrievable.

### SECTION 2: HOW TO VOTE (ONE-STOP)

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In simplest terms, the One- Stop voting process consists of three steps: searching for the registered voter, selecting the correct voter, and clicking the Issue button. There are a lot of small variances that may be encountered along the way such as id being required, addresses needing to be verified or even ballot party needing to be chosen for primary elections. These will be addressed during the following listed steps of the process or in other sections of this guide as noted.

1. Enter appropriate search criteria into the Search Criteria fields. This will typically be a name search using the last name and first name (or first few characters of the first name with a wildcard). To search address fields, click the 'More Criteria' check box on the Home ribbon. Alternatively, the barcode search icon (to the right of the DOB field) can be clicked to scan a NC Driver's License barcode which will auto-populate most of the voter's information.
2. Click the 'Search' button.
  - a. If the voter is located, proceed to step 3.
  - b. If the voter is not located:
    - Check spelling of name.
    - Use wildcard option (%) to search for name.
    - Verify that the voter has not changed their name since their last registration update.
      - i. If there is a Name Change, proceed with a voter update using the 'Update Voter Reg' button accessible from the Home ribbon. See [Chapter 4, Section 2](#) for details on updating registrations.
      - ii. If the voter is still not located, refer to county procedure to continue. Voter may need to vote a Provisional ballot.
3. Select a voter from the Potential Voters grid.



If the VoterView System Format Option 'EPB: AUTOSELECT SEARCH RESULT' is set to 'Y', the first result in the grid will be selected automatically.

**Warning:** There may be several voters with the exact name. Always verify the correct voter is selected by having the voter verify their:

- Full Name
- Residential Address

Upon selection of a voter within the grid, the following actions are performed: buttons may be enabled or disabled based on the allowed functionality and the voter information section is populated (see [Chapter 2, Section 4](#)).

4. Check the voter's vote status on the right side of the Voter Information Panel.

VOTED 

Election Date: 12/24/2013  
 Voted Date: 12/09/2013  
 Ballot Style: R001  
 PCT/VTD: TR123/TR123  
 Ballot ID: 103-2  
 Appl. Num: OS-MSFD-103-2

**Magnified Voter Information Panel**

- a. If there is no data in the Voter Information Panel, proceed to Step 5.
- b. If there is data in the Voter Information Panel, this window indicates the voter may have voted by paper Absentee ballot or at another Early Voting site.
  - i. If the voter is showing as VOTED but claims they did **not** vote already, proceed with the Cancel Vote or Re-Vote process set forth by the county board of elections. Cancel vote is discussed in [Section 3](#) and Re-Vote is discussed in [Section 4](#) of this Chapter.
  - ii. If the voter is showing VOTED and did actually vote already, this voter should not be allowed to vote again.

5. Check the voter's registration status on the left side of the Voter Information Panel.

VRN: 000000089350    ACTIVE    CL08/CL08  
 DUCK, DONALD  
 77 KNOLL DR  
 COLUMBUS, NC 28722

**Magnified Voter Information Panel**

- a. If the status is ACTIVE or TEMPORARY, verify the registrant has a valid Ballot Style (e.g. G001) and proceed to Step 6. If the voter has NO BALLOT as the Ballot choice, the voter has no contest for the selected election and should not be allowed to vote.
- b. If the status is REMOVED or DENIED, they are not registered to vote in the election. They must vote provisionally.
- c. If the voter is INACTIVE, their registration must be updated using the 'Update Voter Reg' button. This will update their status to ACTIVE and allow them to vote. Please review [Chapter 4, Section 2](#) for instructions on making registration updates.

6. Verify the voter's name and address information.

- a. If the registration information is accurate and the voter has a ballot option, proceed to Step 7.
- b. If any voter information needs to be updated click the 'Update Voter Reg' button and make the changes. Do not continue with the remaining steps in this section. See [Chapter 4, Section 2](#) for instructions on making registration updates.

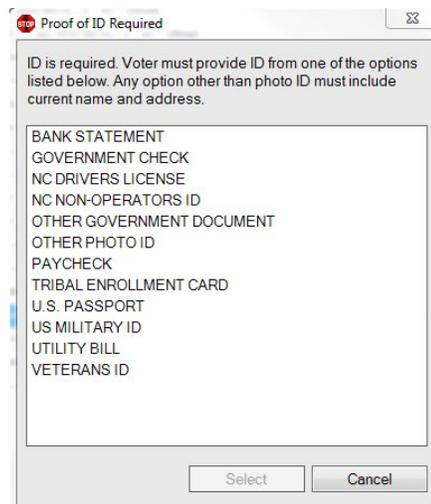
7. Click the 'Issue' button to process a vote for the selected registrant.



**NOTE:** Clicking the 'Issue' button drop-down will give the option to Issue In-Person or Issue Curbside (if 'Allow Curbside Voting' is checked in the options). Clicking 'Issue' without using the drop-down will use the 'Default Voting Method' that was set in the options.

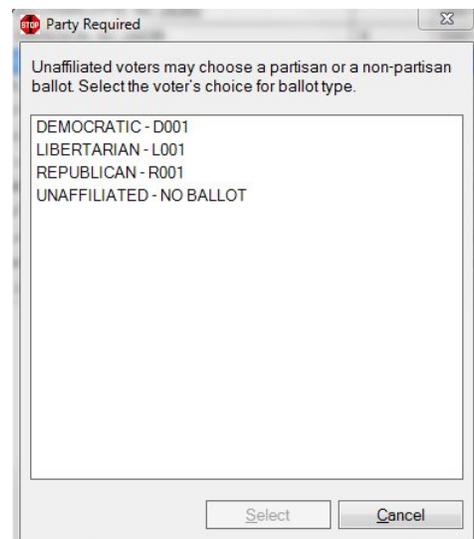
- a. If the voter is required to show HAVA ID before voting, the *Proof of ID Required* pop-up, as shown to the right, will appear. The type of ID the voter provides must be selected; the different types are listed in the table below. Once a type has been selected, click the 'Save' button. Select the 'Cancel' button if the screen has displayed unintentionally.

ID DOCUMENTS
• Bank Statement
• Government Check
• NC Drivers License
• NC Non-Operators ID
• Other Government Document
• Other Photo ID
• Paycheck
• Tribal Enrollment Card
• U.S. Passport
• US Military ID
• Utility Bill
• Veterans ID



- If the voter does not provide the required ID, click 'Cancel' and proceed with the county defined process.

- b. If the voter's party is registered Unaffiliated and the election is a primary, the *Party Required* pop-up will appear, as shown to the right. Select the Party of the ballot indicated by the voter. Click the 'Save' button to continue with the ballot issue process.



8. The Issue Vote screen will display with all fields grayed out, as shown below and the One-Stop Application or label (depending on the print settings) will print.

**Step 2: Review the existing registration information before continuing to vote. Click the "Update Voter" button to make any registration changes. Click the "Vote" button to indicate to the system the voter is voting. Click the "Cancel" button to abort the process.**

**Application Information**

US Citizen

Name  
 Last Name: ALVARADO First Name: ROSAMARIA Middle Name: Suffix:  
 Birth Date (mm/dd/yyyy): 11/11/1987 Birth State: CA  
 Voter Verification  
 NCID: SSN: - -

**Residence Address**

House #: 400 Half: Dir: Street Name: KENSINGTON View Street Range: Type: DR Suffix: Unit: 416  
 Will you have lived here for 30 Days or more prior to the Election Date?   
 City: JACKSONVILLE State: NC ZIP Code: 28546 Phone: 818-913-7075  
 Move Date (mm/dd/yyyy): Yes No

**Mailing Address**

Address1:  Is U.S. Address?   
 Address2:  
 City: State: ZIP Code:

**Voter Information**

Gender: FEMALE Application Dt: 12/18/2015 Ballot Style: S002  
 Race: OTHER Registration Dt: 07/12/2010 NCID: DD141305  
 Ethnicity: HISPANIC OF Party: REPUBLICAN  Religious Objector

**Previous Name and/or Address**

Last Name: First Name: Middle Name: Suffix:  
 Is U.S. Address? Previous NC County (if applicable):  
 Address1:  
 Address2:  
 City: State: ZIP Code:

**Jurisdiction List**

PCT	EN03	EN03
MUNI	JAX	JACKSONVILLE
WARD	JW2	JW2
CONG	03	CONGRESSIONAL DISTR...
SUPCT	04B	4B SUPERIOR COURT
JUD	04	4TH JUDICIAL
NCSEN	06	NC SENATE DISTRICT 6
NCHSE	014	NC HOUSE DISTRICT 14
PROS	04	4TH PROSECUTORIAL

- If everything is correct, click 'Vote' to complete the ballot issue process. **DO NOT CLICK CANCEL VOTE!**
- If the voter needs to update their name or address before the vote is processed, click 'Update Voter Reg' to enable the Name and Address fields. Make any necessary changes and click 'Review'. The One-Stop application form/label will print for the voter to verify the change and sign. Click 'Vote' to complete the ballot issue process.
- If the voter needs to vote Provisionally, the 'Vote Provisional' button will exit the Review process and launch the Provisional Data Entry process. See [Chapter 3, Section 7](#) for details on the provisional voting process in SOSA.
- If the voter has an issue that requires sending him to the Help Desk, click the 'Print Referral' button to print a Help Referral Form which the voter will take with them to the Help Desk. The 'Absentee History' button will display any Absentee information for the current election.
- To cancel the Issue process on the selected voter, click the 'Cancel Vote' button.

9. If the SOSA option "Create BOD file with vote cast" is enabled, an XML file will be created in C:\tmp\BOD with the vote information.



If the incorrect voter was voted, search for the voter again and then proceed with the 'Cancel Vote' process (or the county defined process). See [Section 3](#) for instructions on cancelling a vote.

## SECTION 3: CANCELLING A VOTE (ONE-STOP)

The cancel vote functionality is available when a user votes for a registered voter incorrectly. Reasons for the incorrect vote include, but are not limited to, selecting the wrong registered voter, choosing the wrong ballot party for a primary, forgetting to update the residential address.



- This process **MUST** be completed at the same computer station where the voter was initially processed.
- The Cancel Vote permission is required for the One-Stop Application to perform this task.
- The “Allow user to cancel Votes” option must be selected when the wizard is performed.
- Provisional Votes cannot be cancelled.

To cancel a vote for a registrant, perform the following steps:

1. Using the Search function, find the voter that has already voted.
2. Select the voter’s record in the Potential Voters grid to highlight it.
3. Click the ‘Cancel Vote’ button on the Home ribbon.
4. The Cancel Vote window will appear, as shown to the right. Use the ‘Reason’ drop-down arrow to select the appropriate reason for canceling the vote; the reasons are described below. Enter a Comment in the ‘Comments’ field as it is required. Click the ‘Cancel Vote’ button once complete.

### Available Reasons for Cancelling a Vote

Code	Reason	Description
CN	CANCELLED	Use when one-stop worker needs to cancel a “VOTE”.
NV	NOT VOTED	Use when one-stop application was issued, but voter chose not to vote at that time.
WV	WRONG VOTER	Use if it is determined that the one-stop ballot was issued to a person other than the voter.  <b>Note:</b> Any record with this reason will NOT receive a contact.

Cancel Vote

Voter Reg Num: 000000079215  
Full Name: BROWN, LAURAL FAITH  
Application Num: OS-TR12-000-5  
Election Date: 12/24/2013  
Voting Date: 12/24/2013

Reason

Description

Comments

Cancel Vote Close

## SECTION 4: RE-ISSUING (ONE-STOP)



Re-Issue may not be allowed in SOSA if the county prohibits it. This function is set by the SOSA administrator when running the Wizard. It cannot be changed in the SOSA Voting application.

The Re-Issue process will change the ballot return status in VoterView Absentee to CF (Conflict) for both votes. The CBE office would then need to resolve this conflict before voter history can be applied.

To use the Re-Issue function, perform the following steps:

1. Using the Search function, find the voter that has already voted.
2. Select the voter's record in the Potential Voters grid to highlight it.
3. Click the 'Issue' button. The Vote window will appear, as shown to the right. Use the 'Reason' drop-down arrow to select the appropriate reason for the re-issue; the reasons are described below. Enter a Comment in the 'Comments' field as it is required. Click the 'Vote' button once complete.
4. The Issue Vote screen will display. If any changes need to be made to the voter's name or address, click 'Update Voter Reg' to make the changes and review them. Otherwise, click 'Vote' to complete the re-issue process. See [Chapter 3, Section 2](#) for more information on how to process a vote.

### Available Reasons for Cancelling a Vote

Code	Reason	Description
CN	CANCELLED	Use when one-stop worker needs to cancel a "VOTE".
NV	NOT VOTED	Use when one-stop application was issued, but voter chose not to vote at that time.
WV	WRONG VOTER	Use if it is determined that the one-stop ballot was issued to a person other than the voter.

**Note:** Any record with this reason will NOT receive a contact.

## SECTION 5: ADDING A NOTE TO A VOTED RECORD (ONE-STOP)

The 'Note' button is available for use if there is a need to add a note to a one-stop vote record. The 'Note' button is only enabled when a registrant has voted on the SOSA machine. Notes are disabled for Provisional votes.

To add a note to a voted registrant, perform the following steps:

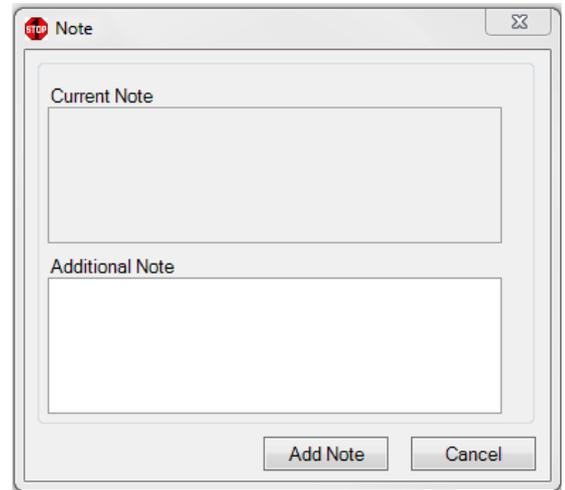
1. Using the Search function, find the voter that has already voted.
2. Select the voter's record in the Potential Voters grid to highlight it.
3. Click the 'Note' button on the Home ribbon.

The Note window will appear, as shown to the right. Type the note information into the *Additional Note* field. When finished, click the 'Add Note' button.



**NOTE:** If the record already has a note attached, the 'Note' button will be green in color and the note will appear in the *Current Note* section of the Note window.

4. To review the note that was just added, search for the voter again and click the green 'Note' button.



## SECTION 6: REPRINTING AN ONE-STOP APPLICATION

If a problem occurs during the voting that prevents the One-Stop Application/Label from printing, the application can be reprinted using the 'Reprint' button on the Home ribbon. There is also a way to reprint the Name/Address change form/label that prints when performing an Update Voter change.

To reprint the One-Stop application/label:

1. Using the Search function, find the voter that has already voted.
2. Select the voter's record in the Potential Voters grid to highlight it.
3. Click the 'Reprint' button.

The screenshot shows the SOSA Voting application interface. The top ribbon has tabs for 'File', 'Home', and 'Tools'. The 'Home' tab is active, showing a search bar with 'HARWELL' entered. Below the search bar are fields for 'Last Name', 'First Name' (containing 'AMY'), 'Middle Name', and 'DOB (MM/DD/YYYY)'. A red arrow points to the 'Reprint' button in the 'Voting' group. Below the search fields is a table titled 'Potential Voters (1 rows)' with columns: Name, Address, Mail Add, Ballot Style, Party(Voted Part), Gender, Race, and DOB. The table contains one row for 'HARWELL, AMY AIUTO' with address '124 PHEASANT RUN RD TROUTMAN, NC 28166', ballot style 'N001/R002', party 'UNA (REP)', gender 'FEMALE', race 'WHITE', and DOB '01/31/1961'.

## SECTION 7: PRINTING A HELP REFERRAL FORM

A Help Referral Form is available if the check-in (registration table) official determines there is a need to refer the voter to the Help Desk. To print the form, follow the steps below:

1. Click the 'Print Referral' button and choose 'Print Blank' to print a blank form or click 'Print Selected Record' to print the form for the selected record.

The screenshot shows the SOSA Voting application interface with the 'Print Referral' dropdown menu open. The menu options are 'Print Blank' and 'Print Selected Record'. The background interface is the same as in the previous screenshot, showing the search results for 'HARWELL, AMY AIUTO'.

On the referral form, the appropriate box will be blackened at the top to indicate One-Stop or Election Day. The example on the next page is a form printed from SOSA.



**Help Referral Form**  
 IREDELL COUNTY, North Carolina

11/08/2016  
 Election Date

08/25/2016  
 Vote Date

One-stop  Election Day Voting Site: IREDELL COUNTY BOARD OF ELECTIONS Worker eburton

**Voter's Information**

MASON ANDREW GEORGE 000009836901  
 Last First Middle Suffix VRN

304 SAFRIET LOOP  
 Address

STATESVILLE NC 28625  
 City State Zip

**Help Referral Reason**

- No Record of Registration
- Unreported Move
- Incorrect Precinct
- Previously Removed
- Incorrect Party
- Unrecognized Address
- No HAVA Acceptable ID
- Voter Assistance Needed
- Wrong Voter Selected
- Other: \_\_\_\_\_

**HAVA Identification Provided by Voter (if applicable)**

- NC Driver License
- U.S. Passport/Passport Card
- U.S. Veterans ID Card
- Tribal Enrollment Card (Federal)
- NC Special ID Card
- Out-of-State License/ID
- U.S. Military ID
- Tribal Enrollment Card (State)
- Other \_\_\_\_\_

**Acknowledgment of Voting Options**

*(Complete only if voter does not want to be referred to Help Station or is choosing not to cast a provisional ballot.)*

I \_\_\_\_\_ ACKNOWLEDGE that the election officials at this site have notified me of my voting options, however I am choosing leave the voting site and/or not to cast a provisional ballot at this time due to the following reasons:

---



---



---

**X**

\_\_\_\_\_  
 Voter Signature

<b>OFFICIAL USE ONLY</b>	Station	116	Date/Time	8/25/2016 10:20:03 AM	V2016.08
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## SECTION 8: HOW TO VOTE (PROVISIONAL)

The Provisional voting process consists of four steps: searching for an existing or adding a new provisional voter, entering registration information, entering provisional information, and Vote. 'Existing Voter Prov' allows you to create a Provisional record for an existing registrant. 'New Voter Prov' allows you to create a Provisional record for an unregistered voter. There are a lot of small variances that may be encountered along the way such as id being required, addresses needing to be verified, or even ballot party needing to be chosen for primary elections. These will be addressed during the following listed steps of the process or in other sections of this guide as noted.

1. Enter appropriate search criteria into the Search Criteria fields. This will typically be a name search using the last name and first name (or first few characters of the first name with a wildcard). To search address fields, click the 'More Criteria' check box on the Home ribbon. Alternatively, the barcode icon (to the right of the DOB field) can be clicked to scan a NC Driver's License barcode which will auto-populate most of the voter's information.
2. Click the 'Search' button.
3. If the voter is located, select their record from the results grid and click 'Existing Voter Prov' from the Provisional Voting section of the ribbon. If the voter is not located, click 'New Voter Prov'.



4. The Provisional Data Entry screen (registration information) will display. If 'Existing Voter Prov' was clicked, any data from the current voter's record will be pre-populated in the appropriate fields, as shown to the right.

A screenshot of the 'Provisional (Existing) Data Entry' form. The form is pre-populated with the following information:

- Application Information:** U.S. Citizen: Yes. Name: Last Name: MASON, First Name: ALLISON, Middle Name: MARIE, Suffix: (blank). Birth Date: 06/01/1998, Birth State: MA.
- Residence Address:** House #: 104, Half: (blank), Dir: (blank), Street Name: LOOKOUT POINT, Type: PL, Suffix: (blank), Unit: (blank). City: MOORESVILLE, State: NC, ZIP Code: 28115, County: (blank), Phone: (blank). Will you have lived here for 30 Days or more prior to the Election Date? Yes.
- Mailing Address:** Address 1: (blank), Address 2: (blank), City: (blank), State: (blank), ZIP Code: (blank). Is U.S. Address? checked.
- Voter Information:** Gender: FEMALE, Ethnicity: NOT HISPANIC, Race: WHITE, Party: Party, UNAFFILIATED, NCDL #: (blank), SSN (Last 4): (blank), Religious Objector: (unchecked).
- Previous Name and/or Address:** Last Name: (blank), First Name: (blank), Middle Name: (blank), Suffix: (blank). Is U.S. Address? checked. Previous NC County (if applicable): (blank). Address 1: (blank), Address 2: (blank), City: (blank), State: (blank), ZIP Code: (blank).

Buttons at the bottom include 'Next', 'Acknw Only', and 'Cancel Vote'.

If 'New Voter Prov' was clicked the screen will be blank (as shown in the image below).

Application Information

U.S. Citizen  Yes  No

Name: Last Name, First Name, Middle Name, Suffix

Birth Date (mm/dd/yyyy), Birth State

Residence Address

House #, Half, Dir, Street Name, View Street Range, Type, Suffix, Unit

City, State, ZIP Code, County, Phone

Will you have lived here for 30 Days or more prior to the Election Date?  Yes  No

Move Date (mm/dd/yyyy)

Mailing Address

Address 1, Address 2, City, State, ZIP Code

Is U.S. Address?

Voter Information

Gender, Ethnicity, Race, Party, NCDL #, SSN (Last 4)

Previous Name and/or Address

Last Name, First Name, Middle Name, Suffix

Is U.S. Address?

Previous NC County (if applicable)

Address 1, Address 2, City, State, ZIP Code

Next, Acknw Only, Cancel Vote

5. Fill in appropriate registration data or scan an NCDL barcode to automatically populate voter data. Fields with names in red text are required and must be populated to move to the next step. When all data has been entered, click 'Next'.

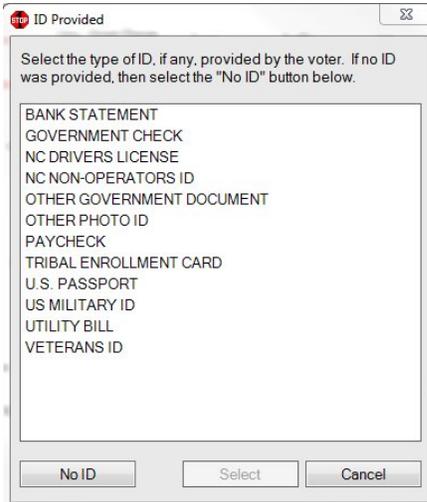


If the voter does not want to vote provisionally, click the 'Acknw Only' button to print an Acknowledgment Notice which informs the voter of their options to vote and must be signed by the voter. Clicking 'Acknw Only' prints the form and cancels the Provisional vote process.

This data will be transferred to One Stop System Manager with the rest of the SOSA vote/update/provisional data and can be found under Tools → Acknowledgment of Voting Options.

To check the status of a NC Driver's License, click the small barcode icon to the right of the US Citizen checkbox and scan the NCDL with a 2D scanner to determine if the ID is expired or not expired. If a match is found, it will also populate the voter data on the screen. See [Section 10](#) for more information on scanning NCDLs.

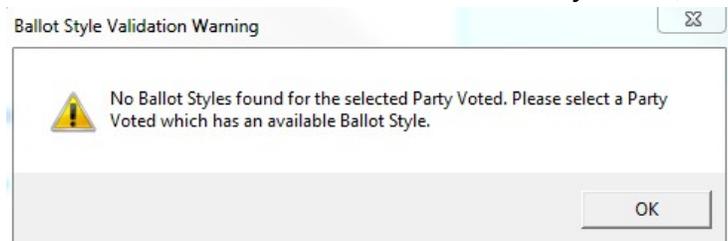
- The *Proof of ID Required* pop-up, as shown below, will appear. The type of ID the voter provides must be selected; the different types are listed in the table below. Once a type has been selected, click the 'Select' button. If the Provisional voter does not provide ID, click the 'No ID' button. Select the 'Cancel' button if the screen has displayed unintentionally.



ID DOCUMENTS
• Bank Statement
• Government Check
• NC Drivers License
• NC Non-Operators ID
• Other Government Document
• Other Photo ID
• Paycheck
• Tribal Enrollment Card
• U.S. Passport
• US Military ID
• Utility Bill
• Veterans ID

- If the voter does not provide the required ID, click 'No ID' and proceed with the provisional process.

- Based on the voter's address and party information entered on the Provisional Data Entry screen, a default 'Party Voted' and 'Ballot Style Issued' will be set. If the voter's registered party is Unaffiliated and the election is a primary, the message shown to the right may display (if there are no UNA contests). Click OK and select the appropriate 'Party Voted' from the drop-down on the Provisional Information screen. Select the appropriate 'Ballot Style Issued' from the drop-down (see example on next page). The 'Ballot Style Issued' field will not be populated if there is not a matching ballot style for the address (likely due to a Geocode issue).



- The Provisional Data Entry (provisional information) screen will display.

Provisional (New) Data Entry

Provisional Voter Registration Information

Full Name ERICA S BURTON  
 US Citizen? Yes  
 Birth Date 03/06/1970  
 Age 47  
 VRN  
 Residential Address 142 BRADY CIRCLE RD  
 STATESVILLE NC 28625  
 Residential County IREDELL COUNTY  
 Will you have lived here for 30 days or more prior to the Election Date? Yes  
 Move Date  
 Phone 704-555-1212  
 Mailing Address  
 Previous Name  
 Previous Address  
 Previous County  
 Birth State CT  
 NCDL  
 SSN  
 Gender FEMALE  
 Race WHITE  
 Ethnicity NOT HISPANIC or NOT LATINO  
 Party UNAFFILIATED  
 ID Provided? NC DRIVERS LICENSE

Provisional Voting Reason

Curbside

Party Voted Default Ballot Style  
 NO BALLOT

Ballot Style Issued Assigned Precinct  
 SH-A

Reasonable Impediment  Yes  No

Reasonable Impediment Reason

Reasonable Impediment Comments

Jurisdiction List

PCT	SH-A	SHILOH-A
CONG	13	CONGRESSIONAL DISTRICT 13
SUPCT	22A	22A SUPERIOR COURT
JUD	22A	22A JUDICIAL
NCSEN	44	NC SENATE DISTRICT 44
NCHSE	084	NC HOUSE DISTRICT 84
TWP	SH	SHILOH
BDED	2	SCHOOL #2
PROS	22A	22A PROSECUTORIAL
VTD	SH-A	SH-A

Previous Review Acknw Only Cancel Vote

Select a Provisional Voting Reason from the drop-down and the Ballot Style Issued (if not already populated).

If the provisional vote was cast curbside, check the 'Curbside' box.

If the voter does not want to vote provisionally, click the 'Acknw Only' button to print an Acknowledgment Notice which informs the voter of their options to vote and must be signed by the voter. Clicking "Acknw Only" prints the form and cancels the Provisional vote process.

Click 'Review' once all required fields are populated. The Provisional Voting Application form/label will print to the default printer. If 'Reasonable Impediment' was set to 'Yes', the Reasonable Impediment Declaration form will also print.

9. The Provisional Data Entry (review) screen will display as shown below.

The screenshot shows a software window titled "Provisional (New) Data Entry". It is divided into two main sections: "Provisional Voter Registration Information" and "Provisional Voting Information".

**Provisional Voter Registration Information:**

Full Name	ERICA S BURTON
US Citizen?	Yes
Birth Date	03/06/1970
Age	47
VRN	
Residential Address	142 BRADY CIRCLE RD STATESVILLE NC 28625
Residential County	IREDELL COUNTY
Will you have lived here for 30 days or more prior to the Election Date?	Yes
Move Date	
Phone	704-555-1212
Mailing Address	
Previous Name	
Previous Address	
Previous County	
Birth State	CT
NCDL	
SSN	
Gender	FEMALE
Race	WHITE
Ethnicity	NOT HISPANIC or NOT LATINO
Party	UNAFFILIATED
ID Provided?	NC DRIVERS LICENSE

**Provisional Voting Information:**

Election Date	07/11/2017
Poll Book Number	WMB-100-1
PIN	CG68-100-1
Location Voted	WMB
Assigned Precinct	
Provisional Voting Reason	JURISDICTION DISPUTE
Reasonable Impediment	No
Reasonable Impediment Reasons	
Reasonable Impediment	

**Jurisdiction List:**

PCT	SH-A	SHILOH-A
CONG	13	CONGRESSIONAL DISTRICT 13
SUPCT	22A	22A SUPERIOR COURT
JUD	22A	22A JUDICIAL
NCSEN	44	NC SENATE DISTRICT 44
NCHSE	084	NC HOUSE DISTRICT 84
TWP	SH	SHILOH
BDED	2	SCHOOL #2
PROS	22A	22A PROSECUTORIAL
VTD	SH-A	SH-A

At the bottom of the window are four buttons: "Previous", "Vote" (with a green checkmark icon), "Acknw Only", and "Cancel Vote" (with a red X icon).

- a. To cancel the Provisional process on the selected voter, click the 'Cancel Vote' button.
- b. If the voter does not want to vote provisionally, click the 'Acknw Only' button to print an Acknowledgment Notice which informs the voter of their options to vote and must be signed by the voter. Clicking "Acknw Only" prints the form and cancels the Provisional vote process.



**Once 'Vote' has been clicked, a Provisional vote cannot be cancelled afterward. The 'Note' function is also disabled for Provisional records.**

- c. If everything is correct, click 'Vote' to complete the Provisional process. The Provisional Voter Instruction sheet or label (depending on the print settings) will print.

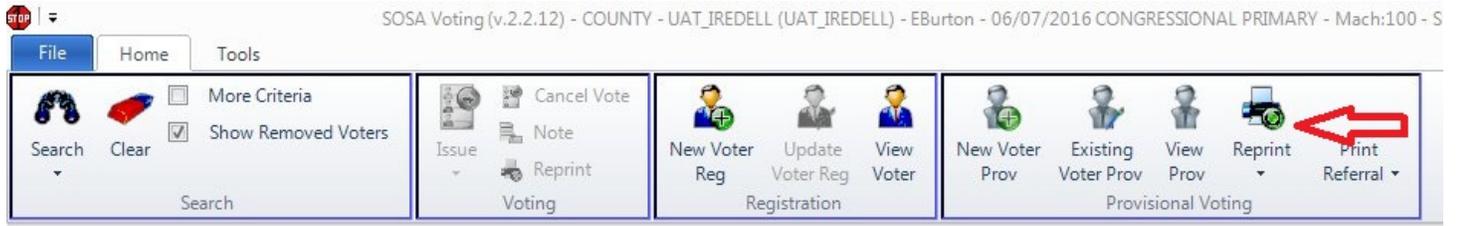
10. If the SOSA option "Create BOD file with vote cast" is enabled, an XML file will be created in C:\tmp\BOD with the vote information.

## SECTION 9: REPRINTING A PROVISIONAL FORM

If a problem occurs during the voting that prevents the Provisional Forms/Labels from printing, the application can be reprinted using the 'Reprint' button in the Provisional Voting section of the Home ribbon.

To reprint the Provisional form/label:

1. Using the Search function, find the voter that has already voted.
2. Select the voter's record in the Potential Voters grid to highlight it.
3. Click the arrow under the 'Reprint' button in the Provisional Voting section of the ribbon. Choose 'Reprint Provisional Form' or 'Reprint Instruction Sheet'.



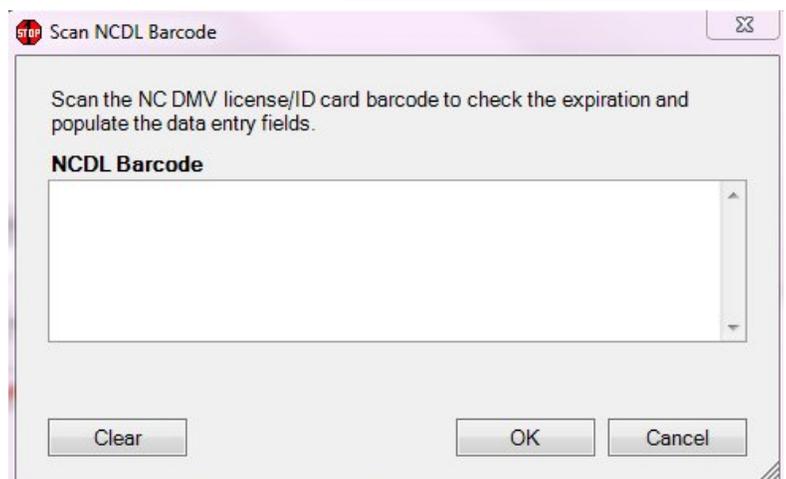
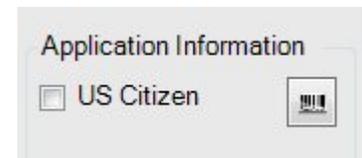
## SECTION 10: 2D BARCODE SCANNING FOR DRIVER'S LICENSE VALIDATION AND VOTER DATA POPULATION

SOSA now offers the ability to scan a North Carolina driver's license to verify that the license is valid and to automatically populate voter data on the Search or Data Entry screens.

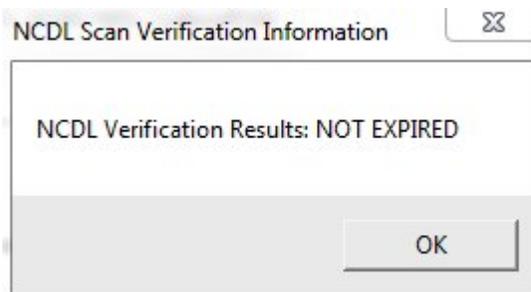
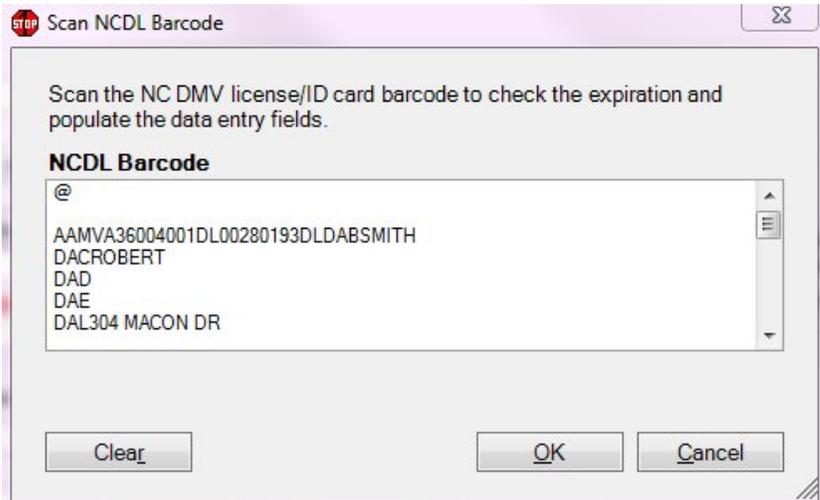
2D Barcode scanning can be accessed from the following screens by clicking the small barcode icon that appears near the US Citizen check box: Update Voter Reg, Issue Vote, New Voter Prov and Existing Voter Prov.

There is also a Barcode Search icon on the main screen (to the right of the DOB field) to populate search criteria (see page 33).

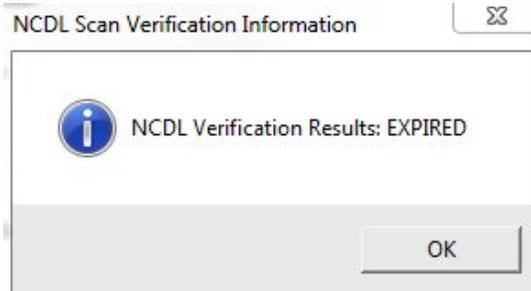
1. To verify a license click the Barcode icon. The pop-up to the right displays.
2. Click in the NCDL Barcode textbox to set the cursor focus to the textbox. Using a 2D barcode scanner, scan the barcode on the back of a North Carolina driver's license.



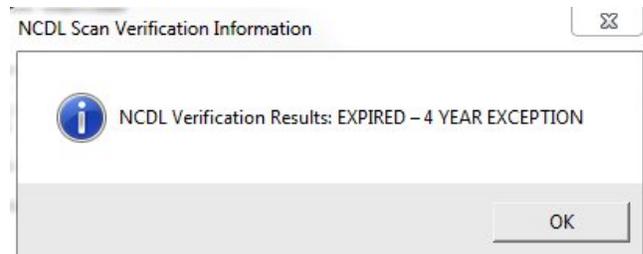
3. The NCDL Barcode field will populate with the information scanned from the barcode.
4. Click 'OK' to determine whether or not the license is valid and populate the data entry fields. One of the messages below will display with NOT EXPIRED or EXPIRED.



License expiration date has not been reached and is valid.



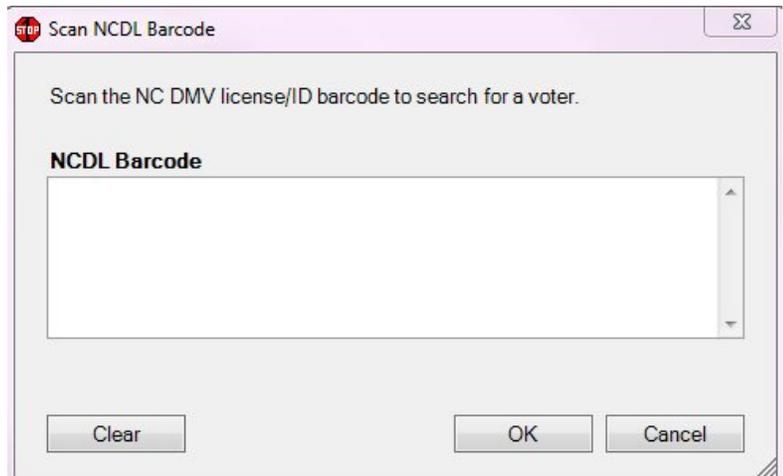
License expiration date has been reached and is no longer valid.



License is still considered valid as it meets the 70 year old exception or the 4-year exception.

- If the license expired after the voter's 70<sup>th</sup> birthday, it meets the 70-year old exception
- If the license has been expired for 4 years or less, it meets the 4-year exception

1. To Search for a voter from an NCDL click the Barcode Search icon on the main screen. The pop-up to the right displays.
2. Click in the NCDL Barcode textbox to set the cursor focus to the textbox. Using a 2D barcode scanner, scan the barcode on the back of a North Carolina driver's license.
3. The NCDL Barcode field will populate with the information scanned from the barcode.
4. Click 'OK' to search for the voter. If a match is found, the record will display in the Potential Voters grid.



Scan NCDL Barcode

Scan the NC DMV license/ID barcode to search for a voter.

**NCDL Barcode**

Clear OK Cancel

# CHAPTER 4: NEW REGISTRATIONS AND REGISTRATION UPDATES

## SECTION 1: OVERVIEW

During one-stop voting, a registered voter may update their name, address, or phone number information so long as the residential address change is within the same county. Due to a preliminary injunction granted for House Bill 589, a citizen living within the county can also newly register at a one-stop site and vote during the one-stop voting period. Furthermore, a registered voter can also update any of their registered information during this same time period except for party if the election is a primary.

The Update Voter function of SOSA allows the user to update a voter's registration information using the 'Update Voter Reg' button. Only active and inactive voters can be updated through SOSA. One of these processes must be performed on INACTIVE voters in order to allow access to voting in SOSA.

The New Voter function of SOSA allows the user to provide for in-person registration and voting at one-stop voting sites using the 'New Voter Reg' button. This is a three-step process which includes Data Entry, Review of Data Entry, and Vote.

SOSA also provides the user a read-only view of a voter's registration information.

## SECTION 2: UPDATING AN EXISTING REGISTRATION

To begin the process of updating voter registration information in SOSA Voting use the 'Update Voter Reg' button on the Home ribbon. The 'Update Voter Reg' button functionality allows updating of the voter's name, residential address, mailing address and phone number. The intent is that the voter is providing a filled out voter application that will be scanned in back at the office. Also, a name/address change form will print that the voter must review and sign.

The following procedure demonstrates how to update a voter's registration information, for Active and Inactive voters.

1. Using the Search function, find the voter that wants to update their information.
2. Select the voter's record in the Potential Voters grid to highlight it.
3. Click the 'Update Voter Reg' button on the Home ribbon.

The Update Voter Registration screen will display, as shown to the right, with Step 1.

Use this screen to make any registration changes allowed.

To check the status of a NC Driver's License and/or



PCT	MT24	MT24
CONG	03	CONGRESSIONAL DISTRICT
SUPCT	04B	4B SUPERIOR COURT
JUD	04	4TH JUDICIAL
NCSEN	06	NC SENATE DISTRICT 6
NCBSE	014	NC HOUSE DISTRICT 14
PROS	04	4TH PROSECUTORIAL
VID	MT24	MT24

populate the voter data, click the small barcode icon to the right of the US Citizen checkbox and scan the NCDL with a 2D scanner to determine if the ID is expired or not expired. The Data Entry fields will be populated with the voter data if the NCDL is found. See [Section 10](#) for more information on scanning NCDLs.

If the voter needs to vote Provisionally, the 'Vote Provisional' button will exit the Update Voter process and launch the Provisional Data Entry process. See [Chapter 3, Section 7](#) for details on the provisional voting process in SOSA.

If the voter has an issue that requires sending him to the Help Desk, click the 'Print Referral' button to print a Help Referral Form which the voter will take with them to the Help Desk.

The 'Absentee History' button will display any Absentee information for the current election. The 'View Street Ranges' button will show the Geocode information for the 'Street Name' entered. Use the 'Comments' button if there is a need to add a comment regarding the registration changes being made. 'Cancel Vote' will cancel the vote process and return you to the search screen. To clear the existing Residence or Mailing address information, click the red eraser icons at the end of each address section.



If the voter has a religious objection to being photographed and has informed the county BOE of this, the Religious Objector box will display with a checkmark to inform the One-Stop Worker that photo ID will not be provided by the voter. **Note: Religious Objector functionality remains, but the ID law has been repealed, making this now irrelevant.**

Ask the voter when they moved. If the voter has moved less than 30 days before the election, select the 'No' radio button under "Will you have lived here for 30 Days or more prior to the Election Date?" and fill in 'Move Date'. If they moved more than 30 days before the election, select the 'Yes' radio button under "Will you have lived here for 30 Days or more prior to the Election Date?"



If the 'Move Date' is less than 30 days before the election, a message will display that the address changes will not be saved. If 'Yes' is clicked, the registrant can vote at their old address and the changed 'Residence Address' will revert back to the address on file. If 'No' is clicked, it returns to the changes screen where you can modify the data or cancel out of the change process.

Enter all available registration information.

- Click the 'Review' button to complete Step 1 and move to Step 2. At this point, SOSA will determine if the voter must provide HAVA ID and/or select a party ballot (similar to Step 7 of [Chapter 3, Section 2](#)). Once this is determined and provided, if necessary, the One-Stop Application form/label will print. If EPB:

The screenshot shows the 'Update Voter Registration' web form, Step 2: Review the registration changes before continuing to vote. The form is divided into several sections:

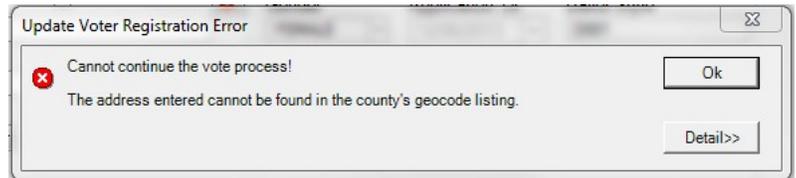
- Application Information:** Includes checkboxes for 'US Citizen', 'Voter Verification NCDL', and 'SSN'. Fields for Name (Last Name: BURTON, First Name: HANNAH, Middle Name: JOSIE, Suffix), Birth Date (04/06/1983), and Birth State (CO).
- Residence Address:** Fields for House # (511), Half, Dir, Street Name (WOODHAVEN), Type (DR), Suffix, Unit, City (JACKSONVILLE), State (NC), ZIP Code (28540), and Phone (910-650-7430). Includes a radio button for 'Will you have lived here for 30 Days or more prior to the Election Date?' with a 'Move Date' field.
- Mailing Address:** Fields for Address1, Address2, City, State, and ZIP Code. Includes a checkbox for 'Is U.S. Address?'.
- Voter Information:** Fields for Gender (FEMALE), Race (WHITE), Ethnicity (NOT HISPAN), Party (UNAFFILIATED), Application Dt (12/18/2015), Registration Dt (12/18/2012), Ballot Style (S002), and NCID (DD160264). Includes a checkbox for 'Religious Objector'.
- Previous Name and/or Address:** Fields for Last Name, First Name, Middle Name, Suffix, and Previous NC County (if applicable). Includes a checkbox for 'Is U.S. Address?'.
- Jurisdiction List:** A table listing various jurisdictions with columns for PCT, WNO, JAX, JW3, CONG, SUPCT, JUD, NCSEN, NCNSE, and PROS.

Buttons at the bottom include 'Vote Provisional', 'Print Referral', 'Absentee History', 'Comments', 'Back', 'Vote', and 'Cancel Vote'.

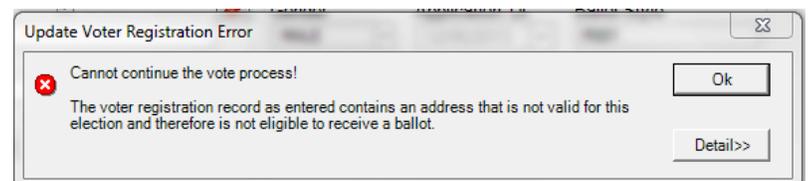
PRINT NAME/ADDRESS CHANGE FORM is set to 'Y' the One-Stop Name/Address Change form will also print. Once printed, the voter should be directed to review the information on the form(s) and sign, and the user should follow the county procedures in regards to the documentation.

The "Printing One-Stop Forms" window will display indicating the application form is being sent to the default printer. The screen will change to Step 2, as shown to the right, with all fields changing to read-only, allowing the user to review the information. There are several pop-up screens that may appear at this stage as well. They are listed below.

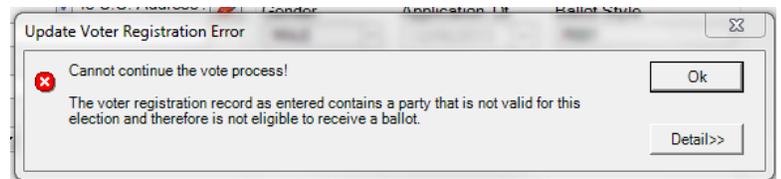
- If an error pop-up screen appears, as shown to the right, then the residential address entered is invalid due to it not being a valid Geocode address for the county. The user can either fix the address (if a mistake was made during data entry) or have the voter vote a Provisional ballot (follow the county procedures).



- If a residential address is valid but there is not a valid ballot style related to that address (and voter's age) for the election, the user will receive the message shown to the right. The user can either fix the address (if a mistake was made during data entry) or have the voter vote a Provisional ballot (follow the county procedures).



- If the election is a Primary election and the registrant being updated has a ballot party with no valid ballot style associated with it, the user will receive the message shown to the right. The voter may have to vote a Provisional ballot (follow the county procedures).



Verify that all changes made are correct and that additional changes are not needed. If further changes are needed, click the 'Back' button to go back to Step 1 above.

5. Click the 'Vote' button in order to cast a ballot related to the changes just made.



**NOTE:** Clicking the 'Issue' button drop-down will give the option to Vote In-Person or Vote Curbside (if 'Allow Curbside Voting' is checked in the options). Clicking 'Issue' without using the drop-down will use the 'Default Voting Method' that was set in the options.

Once the Vote process is complete, there is no way to undo the registration change. If the voter does not wish to vote at this time or the user has made a mistake, click the 'Cancel Vote' button.



Once the Vote occurs, the record will be sent to VoterScan for verification of the changes upon either the next transfer (or the next processed vote record in connected mode).

6. If the SOSA option "Create BOD file with vote cast" is enabled, an XML file will be created in C:\tmp\BOD with the vote information.

## SECTION 3: NEW IN-PERSON (SAME DAY) REGISTRATION

If a voter cannot be found in SOSA using the Search function and/or the voter says they are not registered in the county, a new In-Person Registration (IPR) may need to be processed. This process should NOT be used if the voter is already registered, especially during a primary. It is not intended as an end-around for changing a voter's party, as that change will be caught back at the county office.

The following procedure demonstrates how to add a new registration.

1. Click the 'New Voter Reg' button from the ribbon.

Step 1 of the New Registration screen will appear, as shown to the right.

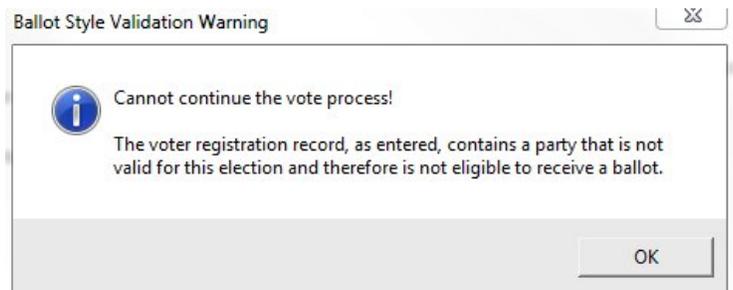
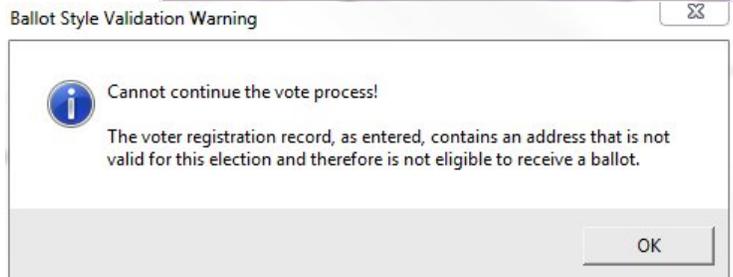
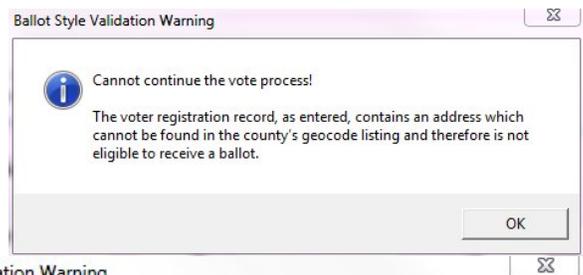
Enter all of the voter's information provided (the required fields are the minimum fields that need entry), or click the Barcode icon to scan an NCDL barcode and populate the data entry fields. The following fields are required: 'US Citizen', 'Last Name', 'Birth Date', 'House #', 'Street Name', 'City', 'State', 'Zip', '30-day move' radio button, and 'Party'. To save keystrokes during data entry, use the 'View Street Ranges' button to display the street information. Double-clicking a row will populate all address fields except for the house number. Enter all available registration information.

Use the 'Comments' button if there is a need to add a comment regarding the new registration. Click 'Print Referral' to print a Help Referral form if the voter needs to be sent to the help table for some sort of problem. Click 'Vote Provisional' if the voter needs to vote a Provisional ballot.

Click the 'Review' button to complete Step 1 and move to Step 2. Select a 'Proof of Residence' HAVA document from the pop-up list and select a 'Voting Method' from the second pop-up list, as shown below.

- The screen will change to Step 2, as shown to the right, with all fields changing to read-only, allowing the user to review the information. At this point the NC Voter Registration Application will print if no problem occurred with the registration data. There are several pop-up screens that may appear at this stage as well. They are listed below.

- If an error pop-up screen appears, as shown to the right, then the residential address entered is invalid due to it not being a valid Geocoded address for the county. The user can either fix the address (if a mistake was made during data entry) or have the voter vote a Provisional ballot (follow the county procedures).
- If a residential address is valid but there is not a valid ballot style related to that address (and voter's age) for the election, the user will receive the message shown to the right. The user can either fix the address (if a mistake was made during data entry) or have the voter vote a Provisional ballot (follow the county procedures).
- If the election is a Primary election and the registrant being updated has a ballot party with no valid ballot style associated with it, the user will receive the message shown to the right. The voter may have to vote a Provisional ballot (follow the county procedures).



Verify that all registration information is correct and that additional changes are not needed. If further changes are needed, click the 'Back' button to go back to Step 1.

- Click the 'Vote' button in order to cast a ballot related to the new registration. The One Stop Application/label will print. Once printed, the voter should be directed to review the information on the form and sign it, following county procedures.

Once 'Vote' is clicked, there is no way to undo the new registration. If the voter does not wish to vote at this time or the user has made a mistake, click the 'Cancel Vote' button.

**Step 2: Review all registration information before continuing to vote. Click the "Back" button to make any changes. Click the "Vote" button to save the registration and indicate to the system the voter is voting. Click the "Cancel" button to abort the process.**

**Application Information**

US Citizen

Name: Last Name: BUNNY, First Name: BUGS, Middle Name: , Suffix:   
 Birth Date (mm/dd/yyyy): 08/24/1955, Birth State:   
 Voter Verification: NCDL, SSN: - -

**Residence Address**

House #: 23, Half: , Dir: , Street Name: JOSEPH, Type: LN, Suffix: , Unit:   
 Will you have lived here for 30 Days or more prior to the Election Date?  Yes  No, Move Date (mm/dd/yyyy):   
 City: ROCKY MOUNT, State: NC, ZIP Code: 27801, Phone:

**Mailing Address**

Address 1: , Is U.S. Address?    
 Address 2:   
 City: , State: , ZIP Code:

**Voter Information**

Gender: , Application Dt: 02/01/2016, Ballot Style: D015   
 Race: , Registration Dt: 02/01/2016   
 Ethnicity: Party: DEMOCRATIC

**Previous Name and/or Address**

Last Name: , First Name: , Middle Name: , Suffix:   
 Is U.S. Address?   
 Previous NC County (if applicable):   
 Address 1:   
 Address 2:   
 City: , State: , ZIP Code:

**Jurisdiction List**

PCT	1401	SHARPSBURG
CONG	13	CONGRESSIONAL DISTR...
SUPCT	07B	7B SUPERIOR COURI
JUD	07	7TH JUDICIAL
NCSEN	03	NC SENATE DISTRICT 3
NCHSE	023	NC HOUSE DISTRICT 23
CCOM	6	COMMISSION #6
BDED	807	S07 EDGE CO SCHOOLS
PROS	07	7TH PROSECUTORIAL

Buttons: Back, Vote, Cancel Vote



Once the Vote occurs, the record will be sent to VoterScan for verification of the changes upon either the next transfer (or the next processed vote record in County mode).

## SECTION 4: VIEW REGISTRATION AND PROVISIONAL INFORMATION

To view more detailed registration information for a selected One-Stop voter, such as Status, Status Reason, Jurisdictions, or DL/SSN, use the 'View Voter Reg' button on the Home ribbon in the Registration section. The View Registration window will appear.

If voter needs to be sent to the Help Desk, click the 'Print Referral' button to print the Help Referral form.

**View Voter Registration**

US Citizen

**Application Information**

Name: Last Name: BURTON, First Name: HANNAH, Middle Name: JOSIE, Suffix: [ ]

Birth Date (mm/dd/yyyy): 04/06/1983, Birth State: CO

Voter Verification: NCDL, SSN: [ ] - [ ] - [ ]

**Residence Address**

House #: 151, Half: [ ], Dir: [ ], Street Name: DEER, Type: DR, Suffix: [ ], Unit: [ ]

City: HUBERT, State: NC, ZIP Code: 28539, Phone: 910-650-7430

Will you have lived here for 30 Days or more prior to the Election Date?  Yes  No

Move Date (mm/dd/yyyy): [ ]

**Mailing Address**

Address 1: [ ], Address 2: [ ], City: [ ], State: [ ], ZIP Code: [ ]

Is U.S. Address?

**Voter Information**

Gender: FEMALE, Application Dt: 12/18/2012, Ballot Style: NO BALLOT

Race: WHITE, Registration Dt: 12/18/2012, NCID: DD160264

Ethnicity: NOT HISPANIC, Party: UNAFFILIATED, Religious Objector:

Status: ACTIVE, Reason: VERIFIED

**Buttons:** Vote Provisional, Print Referral, Absentee History, Comments

**Previous Name and/or Address**

Last Name: [ ], First Name: [ ], Middle Name: [ ], Suffix: [ ]

Is U.S. Address? Previous NC County (if applicable): [ ]

Address 1: [ ], Address 2: [ ], City: [ ], State: [ ], ZIP Code: [ ]

**Jurisdiction List**

PCT	MT24	MT24
CONG	03	CONGRESSIONAL DISTRICT...
SUPCT	04B	4B SUPERIOR COURT
JUD	04	4TH JUDICIAL
NCSEN	06	NC SENATE DISTRICT 6
NCHSE	014	NC HOUSE DISTRICT 14
PROS	04	4TH PROSECUTORIAL
VTD	MT24	MT24

Close

To view the information for a selected Provisional voter, use the 'View Prov' button on the Home ribbon in the Provisional Voting section.

**View Provisional Information**

**Provisional Voter Registration Information**

Full Name: ALLISON MARIE MASON

US Citizen? Yes

Birth Date: 06/01/1998

Age: 19

VRN: 000009849765

Residential Address: 1580 DOGWOOD LN, STATESVILLE NC 28625

Residential County: IREDELL COUNTY

Will you have lived here for 30 days or more prior to the Election Date? Yes

Move Date: [ ], Phone: [ ]

Mailing Address: [ ], Previous Name: [ ], Previous Address: [ ], Previous County: [ ]

Birth State: MA

NCDL: [ ], SSN: [ ]

Gender: FEMALE

Race: WHITE

Ethnicity: NOT HISPANIC or NOT LATINO

Party: UNAFFILIATED

ID Provided? NC DRIVERS LICENSE

**Provisional Voting Information**

Election Date: 07/11/2017

Poll Book Number: WMB-100-2

PIN: CG68-100-2

Location Voted: WMB

Assigned Precinct: CODDLE CREEK #2

Provisional Voting Reason: UNREPORTED MOVE

Reasonable Impediment: No

Reasonable Impediment Reasons: [ ]

**Jurisdiction List**

PCT	ST6	STATESVILLE #6
MUNI	ST1	CITY OF STATESVILLE
WARD	ST16	STATESVILLE WARD#6
CONG	13	CONGRESSIONAL DISTRICT 13
SUPCT	22A	22A SUPERIOR COURT
JUD	22A	22A JUDICIAL
NCSEN	44	NC SENATE DISTRICT 44
NCHSE	095	NC HOUSE DISTRICT 95
TWP	ST	STATESVILLE
BDED	4	SCHOOL #4
PROS	22A	22A PROSECUTORIAL
VTD	ST6	ST6

Previous  Vote  Acknw Only  Close

# CHAPTER 5: DATA TRANSFERS

## SECTION 1: OVERVIEW

Data transfers are required if SOSA is running in LOCAL mode. The data (registration updates, votes, provisionals and returned absentee ballots) on the local machine needs to be sent back to the county server and vice versa. This keeps the voter registration list updated on the local machine as well as updating the registration changes, voting, provisionals and returned ballots processed on the local machine in the county; this in turn allows other machines to get these details. The data needs to be transferred on a timely basis. There are two transfer types, File and Electronic.

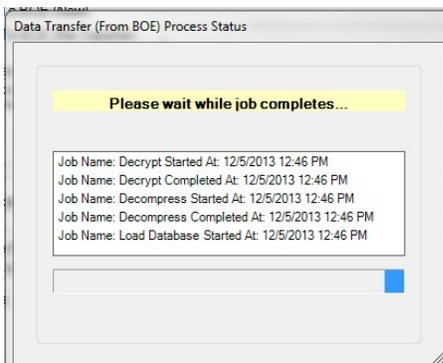
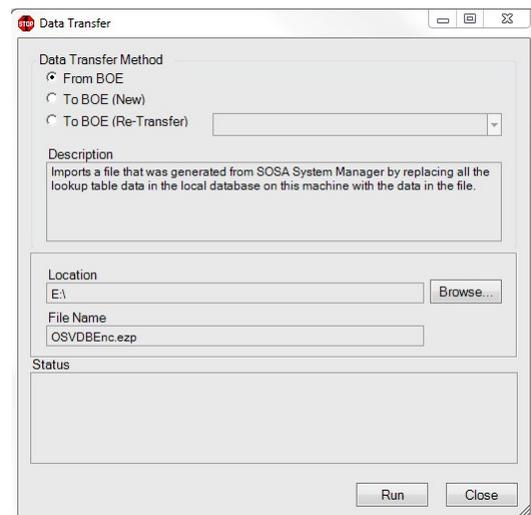
## SECTION 2: LOCAL MODE TRANSFERS-**WITHOUT** NETWORK CONNECTION

This function was formerly known as a Disconnected transfer. In LOCAL mode, the transfer of data between the local machine and the county server is a manual process involving the transfer of data files. It is recommended that the transfer is completed on a daily basis. New data export files should be created at the county office and sent to every site each morning so all SOSA machines can be updated. This process updates the local SOSA machine with any registration changes or voting performed in other locations or on other machines. At the end of the day, a new data export file should be created on each local machine, transported to the office and imported into the county database server using One-Stop System Manager. This cycle repeats each day within the one-stop voting period.

### TRANSFER DATA FROM THE COUNTY BOE

Below are the steps to transfer data from the file, exported at the county, to the SOSA machine. The user will take the export file located on the portable media device, such as a USB drive, back out to the one-stop site and import it into the machine using the steps below.

1. From the Tools tab in SOSA in LOCAL mode, select the 'Transfer' button from the ribbon and choose 'File'.
2. The *Data Transfer* screen will appear, as shown to the right. Click 'Browse' to select the location of the portable media device, if needed. Once the database file location is selected, click the 'Run' button to start the import of the export file.
3. The screen below will display, indicating that the import process has begun.



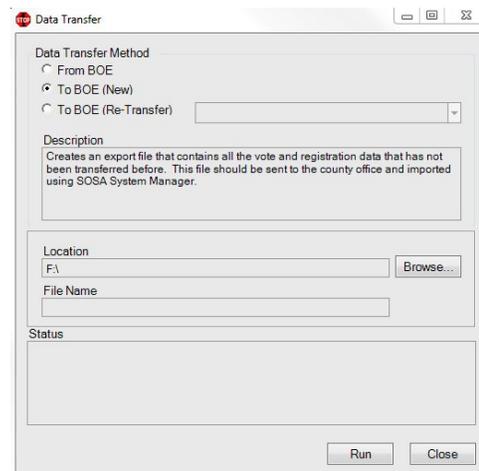
- Upon completion, a *Load Database* screen will appear, as shown to the right, indicating the import is complete. The portable media device can now be removed and used on a different machine if needed.



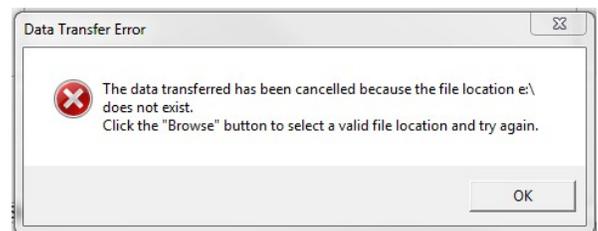
## TRANSFER DATA TO THE COUNTY BOE

Below are the steps to transfer data from the local machine to the county database server. A portable media device, such as a USB drive, will need to be connected to the machine.

- From the Tools tab in SOSA in LOCAL mode, select the 'Transfer' button from the ribbon and choose 'File'.
- The *Data Transfer* screen will appear, as shown to the right. The default transfer method is 'From BOE'. Change the transfer method to 'To BOE (New)'. This will create a new transfer file containing all the registration changes and/or votes that have not been transferred yet. Click the 'Browse' button to select the location of the portable media device, if needed. Once the location is selected, click the 'Run' button to start the creation of the export file. If the user needs to retransfer a previously created transfer file, select 'To BOE (Re-Transfer)' as the transfer method instead. Then the user must select the export date of the file to retransfer.



- If the location selected in Step 2 does not exist, the screen listed to the right will appear. The message indicates the location does not exist. Clicking the 'OK' button returns the user to the *Data Transfer* screen which allows the user to select a valid location.



- If the location selected in Step 2 does exist, once the transfer completes, the 'Status' section of the *Data Transfer* screen will populate with updated information. A sample screen section is shown to the right. If the 'Status' shows 'Transfer Successful', then the file has been created, a *Transfer to BOE Statistics* summary report will be printed, and the user can click 'Close' to exit the transfer screen. If the 'Status' shows 'Transfer Unsuccessful', the user may attempt a retransfer or contact the SBE Helpdesk.



The last transfer status can be checked by clicking the 'Status' button on the Tools ribbon.

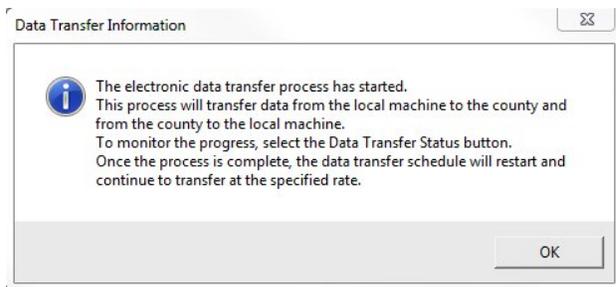
- Once the 'Status' shows 'Complete', the user should take the portable media device and the *Transfer to BOE Statistics* summary report back to the county board of elections office to be imported.

## SECTION 3: LOCAL MODE TRANSFERS-**WITH** NETWORK CONNECTION

This function was formerly known as a Hybrid transfer. In LOCAL mode, the transfer of data between the local machine and the county server is either an automated process or a manual process involving the user initiating a transfer. These transfers update the local machine with any changes to the SOSA tables on the county database server (registration list, absentee list, and any lookup table changes) and update the county data with registration changes or voting performed on the local machines. **In order for LOCAL mode to perform electronic transfers properly, the SEIMS user password and the SOSA wizard password must be EXACTLY the same.** If these passwords don't match exactly, a login error will be received when logging into Local mode and the machine will function as a Local machine without network connection. Electronic transfers will occur automatically as long as there is a connection back to the county server and the transfer interval is not set to Manual.

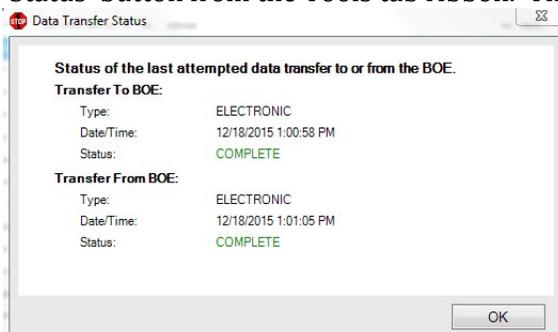
Use the following steps to start the manual transfer process. This will first send data to and then retrieve data from the county database server. This process is only necessary if a transfer of data is needed outside the normal LOCAL transfer interval that has been set.

1. From the Tools tab in SOSA in LOCAL mode, select the 'Transfer' button from the ribbon and choose 'Electronic'.
2. The following pop-up screen, shown below, will appear to indicate that the transfer process has started.



## SECTION 4: CHECK TRANSFER STATUS

To determine the last transfer status from either an automatic or manual transfer, the user can click the 'Status' button from the Tools tab ribbon. This will bring up the *Data Transfer Status* screen, as shown below.



The following statuses are possible:

- COMPLETE – The transfer finished successfully.
- INCOMPLETE – The transfer had a problem transferring and was unable to complete.
- PROCESSING – The transfer is currently in progress.

- EXCEED THRESHOLD – The number of records to transfer exceeds the transfer limit.

## SECTION 5: POST ELECTION AUDIT

The One-Stop Post-Election Audit is a process that the user should run at the end of the one-stop election period on each SOSA machine that was installed through the ‘Complete’ method. This audit process exports all the one-stop data (registrations, votes, etc.) made on the local machine and creates an audit data file (in xml format). This data file is imported into One-Stop System Manager where the data in the file is compared with the data on the county database (that was transferred over the one-stop period). The user can view, exclude, and process any records that exist in the data file that do not exist on the county. All SOSA machines *MUST* run the post-election audit in order to convert SOSA to OVRD.



The post-election audit process ensures that all of the one-stop data from the SOSA machines is accounted for in the county database server and that a transfer was not accidentally missed.



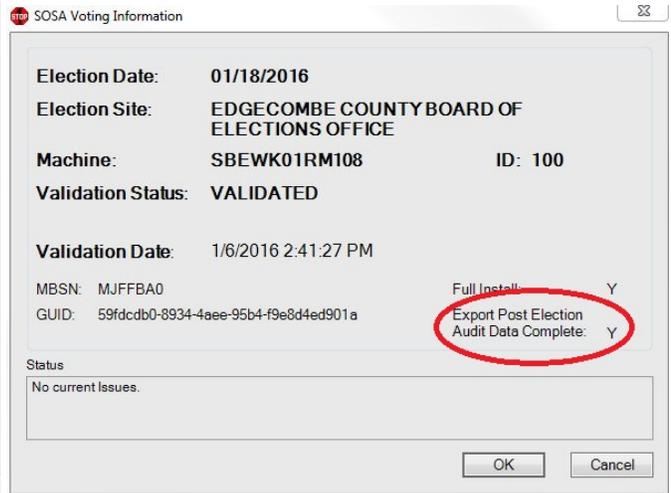
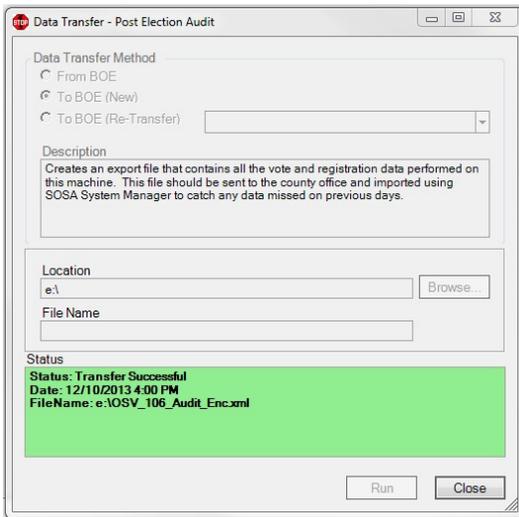
### **Important!**

An audit transfer is done at the END of one-stop. Once it is done, no other one-stop activity can be performed on that machine other than searching and re-transferring the audit file again. View Voter will also be available but keep in mind that any one-stop records still awaiting update in VoterScan will not display the updated information on the SOSA machine.

## EXPORT FROM SOSA

To begin the post-election audit process, the user must be using SOSA in LOCAL mode.

1. Click the Tools tab ribbon and select the *Post Election Audit* button from the ribbon.
2. The *Data Transfer – Post Election Audit* screen shown to the right will display. Verify the location in which to save the audit file; click ‘Browse’ to bring up the browse folder screen to change the location. When ready, the user should click ‘Run’ to perform the post-election audit.
3. Once the audit process is complete, the ‘Status’ section will populate, similar to the screen shown below. Also, the *SOSA Voting Information* screen will now indicate that the post-election audit has been run, as shown in the screen below and to the right.



4. Verify there is an audit file as specified in the 'File Name' field.

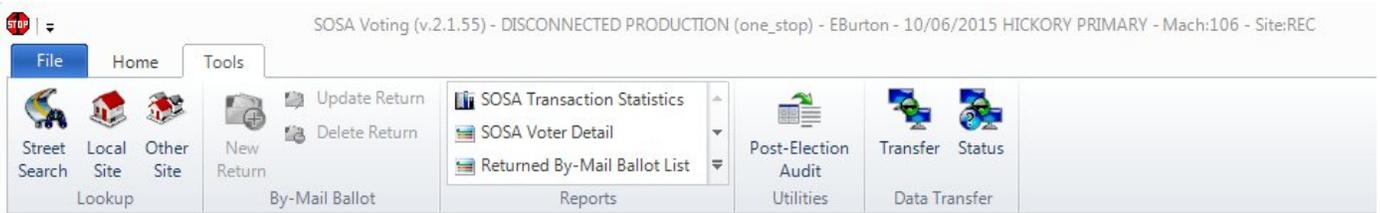
# CHAPTER 6: REPORTS

## SECTION 1: OVERVIEW

This chapter discusses the four reports available within the SOSA application.

## SECTION 2: ONE-STOP VOTING REPORTS

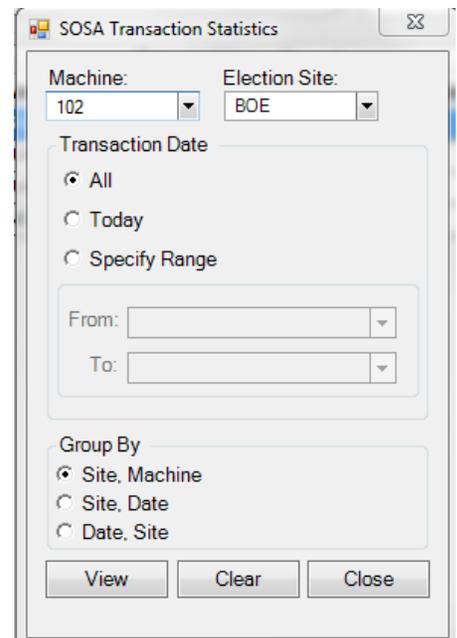
In SOSA, there are five reports that produce either statistics or detail for all activity that has occurred on a particular machine: the SOSA Transaction Statistics report, the SOSA Voter Detail report, the Returned By-Mail Ballot List, the SOSA Provisional Poll Book and the SOSA Transaction Audit List. To access these reports in SOSA, select the Tools tab and select *SOSA Transaction Statistics*, *SOSA Voter Detail*, *Returned By-Mail Ballot List*, *SOSA Provisional Poll Book* or *SOSA Transaction Audit List* from the Reports box.



## SOSA TRANSACTION STATISTICS REPORT

The SOSA Transaction Statistics report gives a summary count of the following information with site and machine: votes cast, cancelled votes, notes, provisionals, new registrations and updated registrations. After selecting the menu item, the initial screen that displays is a criteria screen for the report, as displayed to the right.

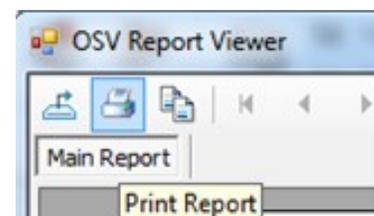
The user selects the machine and election site for which to get statistics. The transaction date defaults to all dates, but the user has the option to choose only the current day's counts (select "Today") or a range of dates. The user can also select how the report is grouped. This report will only return data for dates within the one-stop period.



The connection mode determines the machine and site list. In COUNTY mode, all the machines/sites related to COUNTY mode machines are shown. In LOCAL mode, only the single local machine is available.

After criteria fields have been chosen, the user clicks 'View' to run and display the report. A sample of the report can be seen on the following page.

To print the report to the default printer, click the small printer icon (2<sup>nd</sup> from the left).



IREDELL COUNTY BOARD OF ELECTIONS								
SOSA TRANSACTION STATISTICS								
WHERE machine_abbr = '100'								
	Machine	All Votes	Cancel	Actual Votes (All Votes - Cancel)	Updated Registrations	New Registrations	Provisionals	Notes
Election Site:	LOB							
	100	1	0	1	0	1	1	0
Total:		1	0	1	0	1	1	0

### SOSA VOTER DETAIL REPORT

The SOSA Voter Detail report gives a list of voters with some of their registration/vote data. The data includes name, VRN, residential address, vote type, ballot number, party, party voted, vote date, age, gender, race, site, and machine. After selecting the menu item, the initial screen that displays is a criteria screen for the report, as displayed to the right.

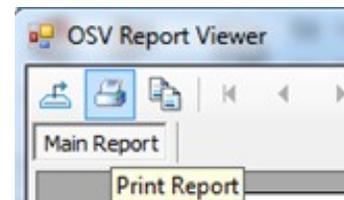
The user selects the machine and election site for which to get statistics. The transaction date defaults to all dates, but the user has the option to choose only the current day's counts (select 'Today') or choose a range of dates. Since this report only is related to an election, make sure the dates are valid for the one-stop period.



The connection mode determines the machine and site list. In COUNTY mode, all the machines/sites related to COUNTY mode machines are shown. In LOCAL mode, only the single local machine is available.

After criteria fields have been chosen, the user clicks 'View' to run and display the report. A sample of the report can be seen on the following page.

To print the report to the default printer, click the small printer icon (2<sup>nd</sup> from the left).



**POLK COUNTY BOARD OF ELECTIONS  
SOSA VOTER DETAIL**

Machine\_abbr = '102' AND Site\_abbr = 'BOE'

Name/VRN	Address	VoteType	BallotNumber	Party	VoteDate	Age	Gender	Race	Election Site	Machine
INGLE, RANDY DALE 000000017149	10750 NC HWY 9 COLUMBUS, NC 28722	V	10200001	DEM(DEM)	12/05/2013	67	M	WHITE	BOE	102

Votes: 1

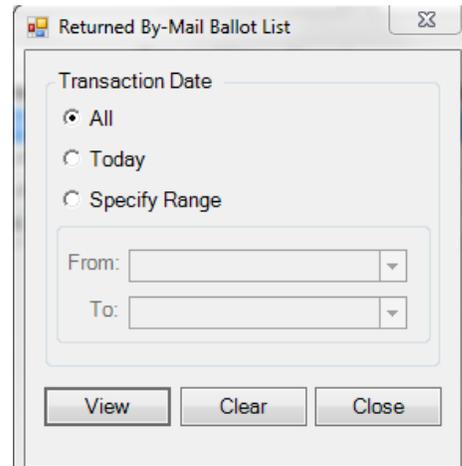
Cancels: 0

ActualVotes: 1

**RETURNED BY-MAIL BALLOT LIST REPORT**

The Returned By-Mail Ballot List report gives a list of voter details for voters that have returned a mailed ballot on the SOSA machine. The data includes name, VRN, delivery name, relationship to voter, application number, return date, election site, machine and update operator. After selecting the menu item, the initial screen that displays is a criteria screen for the report, as displayed to the right.

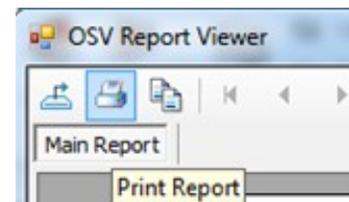
The user selects the date(s) for which to get statistics. The transaction date defaults to all dates, but the user has the option to choose only the current day's counts (select "Today") or choose a range of dates. Since this report only is related to an election, make sure the dates are valid for the one-stop period.



The connection mode determines the machine and site list. In COUNTY mode, all the machines/sites related to COUNTY mode machines are shown. In LOCAL mode, only the single local machine is available.

After criteria fields have been chosen, the user clicks 'View' to run and display the report. A sample of the report can be seen below.

To print the report to the default printer, click the small printer icon (2<sup>nd</sup> from the left).



**POLK COUNTY BOARD OF ELECTIONS  
RETURNED BY-MAIL BALLOT LIST**

Name	VRN	Delivery Name	Relationship to Voter	Application Number	Return Date	Election Site	Machine	Update Operator
BARTON, BETTY JANE	000000001974	BETTY BARTON	VOTER	3	12/05/2013	BOE	102	eburton

Total Ballots: 1

---

## PROVISIONAL POLL BOOK

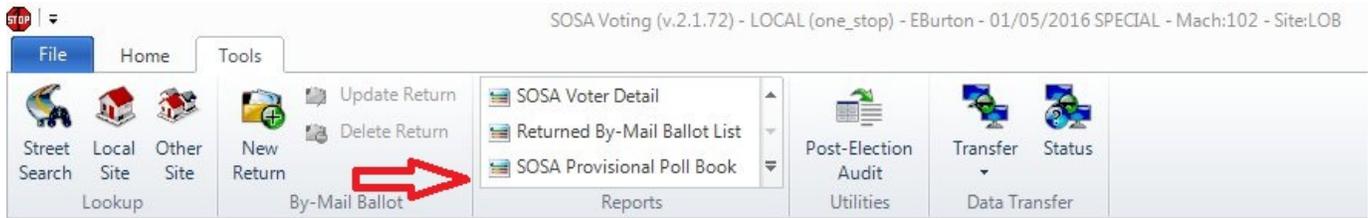
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The SOSA Provisional Poll Book report is a detailed listing of the provisional voting information logged on a particular machine. The report displays the count, poll book number, voter name and address, ballot style issued, voted date and the PIN number for a provisional voter.



If SOSA is set to use label printing, this report cannot be printed; it must be exported to a PDF and be printed outside of SOSA.

To run the report, select SOSA Provisional Poll Book from the Reports section of the Tools ribbon.



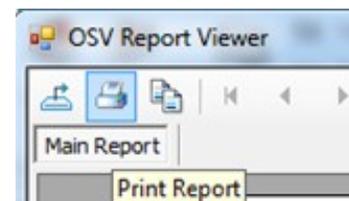
The report will display as shown below. To export the report, click the first icon on the left.

**HYDE COUNTY BOARD OF ELECTIONS**  
**SOSA PROVISIONAL POLL BOOK**  
OS Site: HYDE COUNTY BOARD OF ELECTIONS OFFICE  
Machine ID: 100  
Election: 04/14/2015 MUNICIPAL

Count	Poll Book No.	Voter Name/Address	Ballot Style Issued	Voted Date	PIN Number
1	BOE-100-1	MOUSE, MINNIE 71 CATFISH LN BELHAVEN, NC 27810	M001	03/12/2015	CF41-100-1
2	BOE-100-2	DUCK, DAFFY 71 CATFISH LN BELHAVEN, NC 27810	M001	03/12/2015	CF41-100-2

Grand Total: 2

To print the report to the default printer, click the small printer icon (2<sup>nd</sup> from the left).



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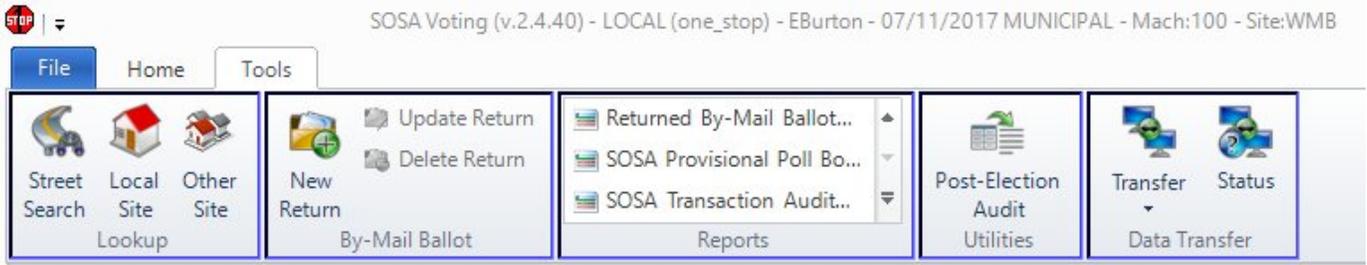
## SOSA TRANSACTION AUDIT LIST

---

The SOSA Transaction Audit List report is based on the transactions in SOSA. Both transactions that have been processed and those that have been cancelled during the voting process shall be listed. The report can be run for Absentee records or Provisional records. The report displays the Name, Application Number or Poll Book Number, Record Type, Completed Vote Process (Y or N), Process Date and Ballot ID. Note: Records only print on this report if the One-Stop Application or Provisional Application have printed and the process was then cancelled via the Cancel Vote button.

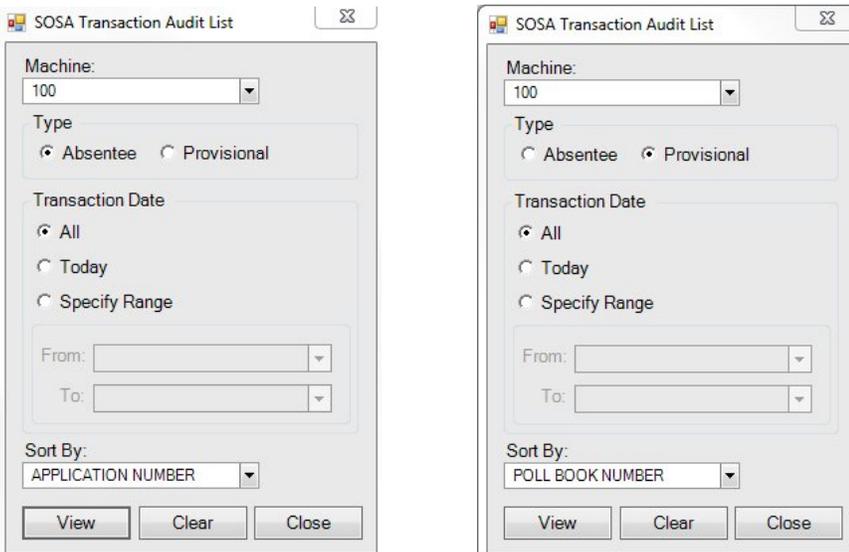


To run the report, select SOSA Transaction Audit List from the Reports section of the Tools ribbon



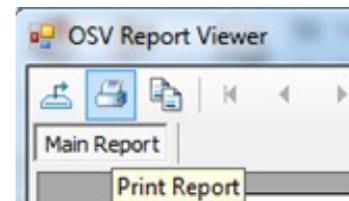
After selecting the menu item, the initial screen that displays is a criteria screen for the report, as displayed below. There are 2 data types the report can be run for: Absentee and Provisional.

The user selects the Machine, Type, Transaction Date and Sort By options. The transaction date defaults to all dates, but the user has the option to choose only the current day's counts (select 'Today') or choose a range of dates. Since this report only is related to an election, make sure the dates are valid for the one-stop period. The Sort By options for Absentee records are Application Number or Ballot ID, for Provisional records the options are Poll Book Number or Ballot ID.



After criteria fields have been chosen, the user clicks 'View' to run and display the report. A sample of the report can be seen below.

To print the report to the default printer, click the small printer icon (2<sup>nd</sup> from the left).



## Absentee Audit List Report

### IREDELL COUNTY BOARD OF ELECTIONS SOSA TRANSACTION AUDIT LIST

Type = 'Absentee', Machine = 'ALL', Date Range = 'ALL'  
Machine (run from) = '107', Connection = 'COUNTY'

Name	Application Number	Record Type	Completed Vote Process	Process Date	Ballot ID
JONES, PAMELA MARTIN	OS-PBC-103-0	UPDATE VOTER	N	01/12/2017 12:06:29 PM	103-0
MARTIN-DAVIS, PAMELA JOY	OS-PBC-103-1	UPDATE VOTER	Y	01/12/2017 12:08:22 PM	103-1
TYLER, CHERI MARIE	OS-PBC-104-1	ISSUE VOTE	N	01/13/2017 01:59:54 PM	104-1
SMITH, LAKISHA	OS-UGFD-106-1	ISSUE VOTE	Y	01/18/2017 10:39:49 AM	106-4
REYNOLDS, JAMES WILBUR	OS-UGFD-106-2	UPDATE VOTER	Y	01/18/2017 04:12:22 PM	106-5
MARTIN, DAVID AUGUSTA	OS-UGFD-107-1	ISSUE VOTE	Y	01/18/2017 04:07:05 PM	107-1
REYNOLDS, JAMES EDWARD	OS-UGFD-107-2	UPDATE VOTER	Y	01/18/2017 04:11:57 PM	107-2
BUNNY, BUGS	OS-UGFD-107-3	NEW VOTER	N	01/27/2017 11:16:36 AM	107-5

Complete: 5  
Incomplete: 3  
Total: 8

## Provisional Audit List Report

### IREDELL COUNTY BOARD OF ELECTIONS SOSA TRANSACTION AUDIT LIST

Type = 'Provisional', Machine = '107', Date Range = 'ALL'  
Machine (run from) = '107', Connection = 'COUNTY'

Name	Poll Book Number	Record Type	Completed Vote Process	Process Date	Ballot ID
BUNNY, BUGS	UGFD-107-1	NEW PROVISIONAL	N	01/27/2017 11:14:24 AM	107-3
BUNNY, BUGS	UGFD-107-2	NEW PROVISIONAL	N	01/27/2017 11:15:54 AM	107-4
BENTON, BARBARA MCMASTERS	UGFD-107-3	EXISTING PROVISIONAL	N	01/27/2017 11:21:43 AM	107-6

Complete: 0  
Incomplete: 3  
Total: 3

# CHAPTER 7: TOOLS

## SECTION 1: OVERVIEW

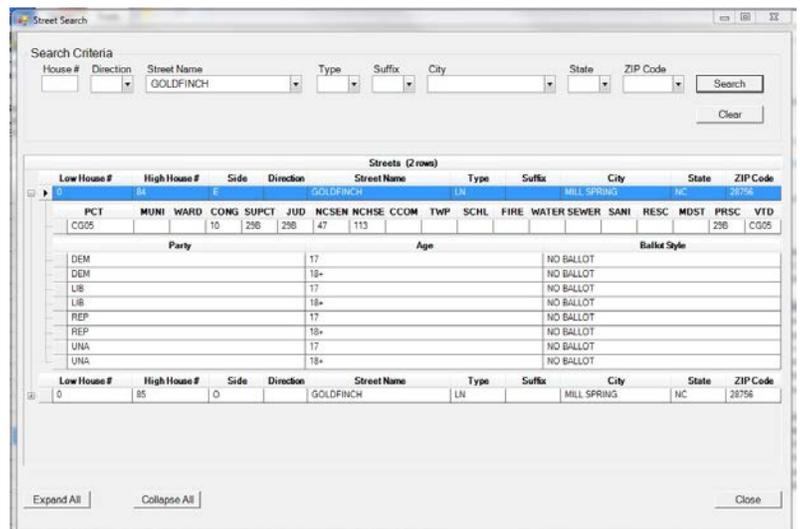
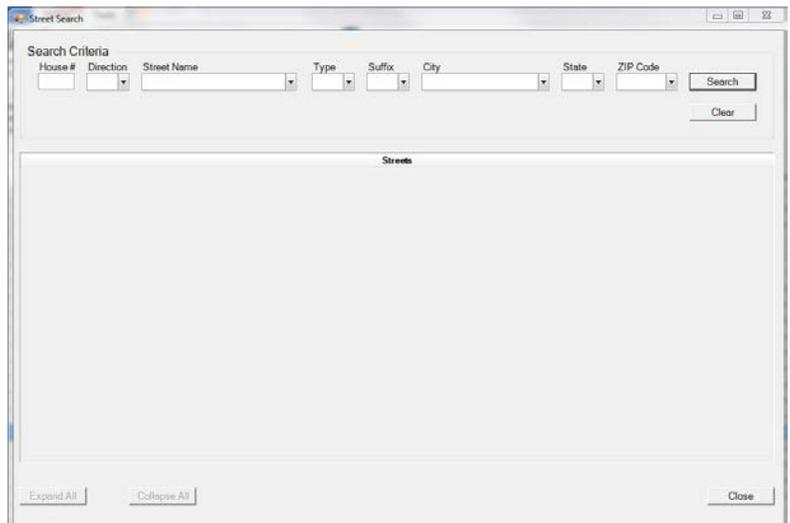
This chapter discusses several tools available to the user, including the street search, by-mail absentee ballot returns, change password, site and machine information, and convert a SOSA machine to Election Day (OVRD) mode.



## SECTION 2: STREET SEARCH

The Street Search tool is used to determine the jurisdiction and ballot style information of a selected street. This is useful for looking up ballot styles for specific addresses, especially for provisional voting. Follow the steps below to perform a street search.

1. Select the Tools tab and then click 'Street Search'. The Street Search screen will appear, as shown to the right.
2. Select or enter in any criteria field that may help find the street; typically this is the street name field. The criteria fields include: 'House #', 'Direction', 'Street Name', 'Type', 'Suffix', 'City', 'State', and 'Zip Code'.
3. Click the 'Search' button. The results will display in the Streets grid section of the Street Search screen with plus (+) signs next to them. When the plus (+) sign is clicked, it will expand the results and display all of the detailed information, as shown to the right. The detailed information for a row shows all of the jurisdictions tied to the street, as well as ballot style information broken out by Party, Age and Ballot Style. If the 'Expand All' button is clicked, the detailed jurisdiction and ballot information for all results in the grid will display. If the 'Collapse All' button is clicked, the detailed information will be hidden.



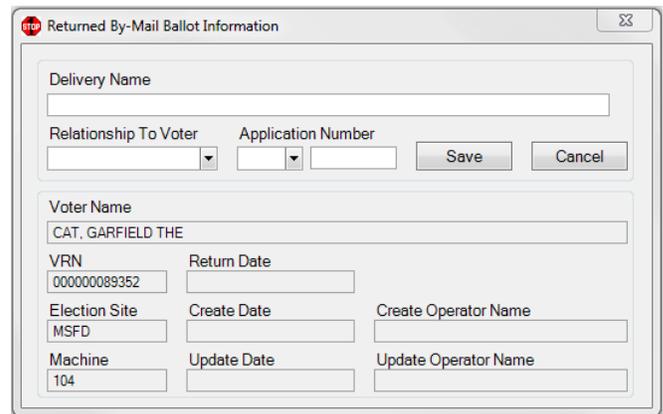
## SECTION 3: BY-MAIL ABSENTEE BALLOT RETURNS

HB 589 makes the delivery of a by-mail absentee ballot to a one-stop site permissible. SOSA will capture who, where and when a by-mail absentee ballot was delivered, along with other pertinent details, in order to track chain of custody. The By-Mail Absentee Ballot returns function allows the user to process an absentee ballot that was returned to the One-Stop site. Once a return has been entered, it can be updated or deleted if necessary. The data will be transferred to SOSA System Manager along with the votes and registration updates.

To process a by-mail absentee ballot returned to the One-Stop site, complete the following steps:

1. Enter search criteria to locate the voter returning the ballot and click 'Search'.
2. Select the Tools tab.
3. Click the 'New Return' button. The Returned By-Mail Ballot Information window displays as shown to the right.

4. Fill in the Delivery Name (the person returning the ballot), Relationship to Voter, and the Application Number. The application number consists of the absentee type (CIV, MIL, OVR) and the unique sequence number (e.g., CIV-8). The bottom section of the window will populate with the Voter Name, VRN, Election Site and Machine. The Return Date, Create Date, Update Date and Operator Names are populated when the return is saved or updated. Click 'Save' to mark the voter as returning a by-mail ballot. The Returned Ballot icon will appear in the Voter Information Panel.

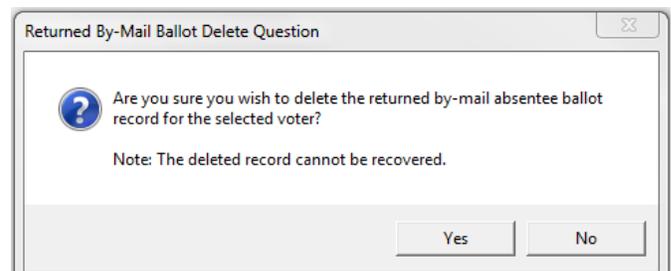
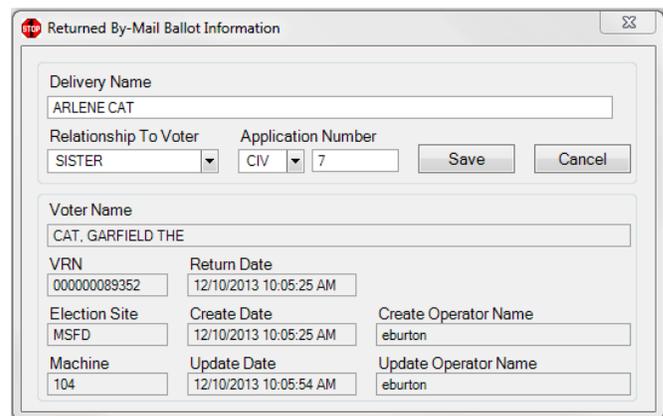


To Modify an Existing Return:

5. If a mistake was made with the return, it can be updated using the 'Update Return' button on the Tools ribbon. Only the Delivery Name, Relationship to Voter and Application Number can be updated, as shown to the right. Click 'Update Return' to make and save any changes.

To Delete an Existing Return:

6. If the return needs to be deleted entirely, this can be done with the 'Delete Return' button on the Tools ribbon. Click 'Delete Return'. At the Returned By-Mail Ballot Delete Question pop-up, click 'Yes' to delete the record, and remove the Return Ballot indicator. To cancel the delete, click 'No'. Once a return record is deleted it cannot be recovered.



## SECTION 4: CHANGE PASSWORD OPTION

SOSA provides the ability for a user to change their password, should they need it. If the user does not know their password to log in to SOSA, another user with supervisory privileges can change the password for them. By default, a user's password is set during the set-up process of the Wizard in One-Stop System Manager. It is recommended to change the password after the first login to ensure that secure passwords are being used. The user must have the Change Password permission to enable the change password functionality.



In order for LOCAL mode to function properly with a network connection, each user's SOSA Voting password MUST match their SEIMS password (passwords are case sensitive).

The following steps describe how a user can change their password.

1. Click on *File* → *Information* → *Change Password*. The change password screen appears, as shown to the right.
2. Enter the new password in the *New Password* field. Enter the same password into the *Confirm New Password*. Click the 'Change Password' button to put the new password into use.



Please keep in mind that passwords are case sensitive. Be sure to use upper and lower case where necessary.

If the user has supervisory privileges, the login name field will have a drop-down list of users that can be reset. The 'Reset Password' button can be used by supervisors only.

To change another user's password, select the 'Login Name' from the drop-down and click 'Reset Password'. This will reset the user's password to the system default.



The Change Password function works the same way in COUNTY mode, but it will change the SEIMS Application (VoterView, VoterScan, Report Manager, etc) password. It is therefore recommended that password changes not be made in COUNTY mode.

The screenshot shows a 'Change Password' dialog box. The title bar includes a red 'STOP' icon and the text 'Change Password'. The dialog contains three input fields: 'Login Name' (a dropdown menu currently showing 'EBURTON'), 'New Password', and 'Confirm New Password'. At the bottom of the dialog are three buttons: 'Change Password', 'Reset Password', and 'Cancel'.

## SECTION 5: SITE INFORMATION

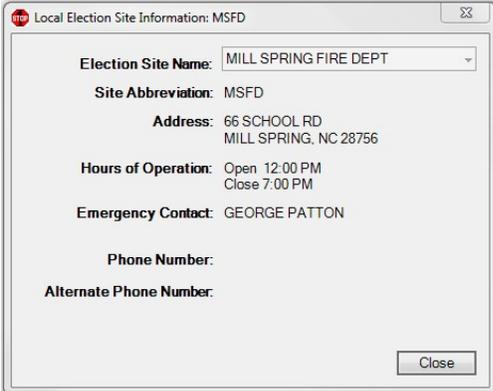
SOSA provides site information in three ways through the File menu and Tools ribbon. These items will allow the user to find out information about the site to which the machine is currently set, other Election Day voting sites within the county, as well as information about the current machine. To access the 'Local Site Information: <XXX>' (where XXX is the precinct of the current machine) and 'Other Election Sites' select the Tools ribbon and then click 'Local Site' or 'Other Site'. To access the local machine information, click File → Information → Machine Information.

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## LOCAL SITE INFORMATION

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Local Site Information gives the user address and contact detail for the one-stop site for the current machine. Access to this tool is from the Tools ribbon (*Tools* → *Local Site*) and will display the screen shown to the right. In the sample, the SOSA machine was set to site “MSFD”.



The screenshot shows a dialog box titled "Local Election Site Information: MSFD". It contains the following fields and values:

<b>Election Site Name:</b>	MILL SPRING FIRE DEPT
<b>Site Abbreviation:</b>	MSFD
<b>Address:</b>	66 SCHOOL RD MILL SPRING, NC 28756
<b>Hours of Operation:</b>	Open 12:00 PM Close 7:00 PM
<b>Emergency Contact:</b>	GEORGE PATTON
<b>Phone Number:</b>	
<b>Alternate Phone Number:</b>	

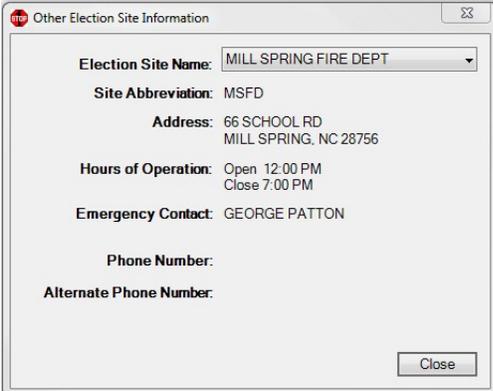
A "Close" button is located at the bottom right of the dialog box.

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## OTHER SITE INFORMATION

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Other Election Sites gives the user address and contact detail for other one-stop sites within the county. Access to this tool is from the Tools ribbon (*Tools* → *Other Site*) and will display the screen shown to the right. To view information for other sites, simply select the site from the drop-down list.



The screenshot shows a dialog box titled "Other Election Site Information". It contains the following fields and values:

<b>Election Site Name:</b>	MILL SPRING FIRE DEPT
<b>Site Abbreviation:</b>	MSFD
<b>Address:</b>	66 SCHOOL RD MILL SPRING, NC 28756
<b>Hours of Operation:</b>	Open 12:00 PM Close 7:00 PM
<b>Emergency Contact:</b>	GEORGE PATTON
<b>Phone Number:</b>	
<b>Alternate Phone Number:</b>	

A "Close" button is located at the bottom right of the dialog box.

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## MACHINE INFORMATION

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Machine Information gives the user details about the local machine. Access to this tool is from the File menu (*File* → *Information* → *Machine Information*) and will display the screen shown to the right. Information that will be displayed includes the Election, Site, Machine, Validation Status and Validation Date for the SOSA machine. It also shows the MBSN and GUID of the machine as well as any ‘Status’ messages. There are also indicators for “Full Install” mode and if the “Post Election Audit” has been completed.



The screenshot shows a dialog box titled "SOSA Voting Information". It contains the following fields and values:

<b>Election Date:</b>	01/05/2016	
<b>Election Site:</b>	ONSLow COUNTY BOARD OF ELECTIONS OFFICE	
<b>Machine:</b>	SBEWK01RM108	<b>ID:</b> 102
<b>Validation Status:</b>	VALIDATED	
<b>Validation Date:</b>	12/17/2015 12:09:47 PM	
<b>MBSN:</b>	MJFFBA0	<b>Full Install:</b> Y
<b>GUID:</b>	e446be15-0fce-40ef-ad16-e0c578e41660	<b>Export Post Election Audit Data Complete:</b> N

**Status**  
No current issues.

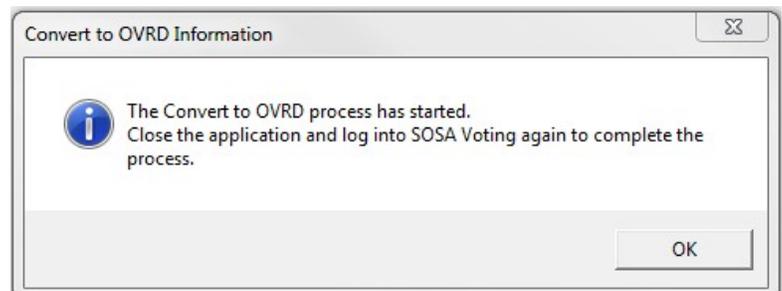
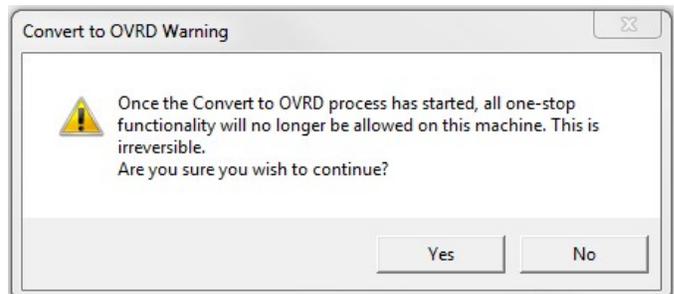
An "OK" button is located at the bottom right of the dialog box.

## SECTION 6: CONVERT TO OVRD

SOSA has two functions: one-stop voting and Election Day use. One-stop voting is the initial function in which the application begins; however, it can be converted to Election Day use. Once switched between functions, there is no way to switch back outside of re-installing the application. When the application is converted to Election Day use, it is referred to as the On-Site Voter Registration Database application (OVRD).

Certain steps need to be followed to convert a SOSA machine that was used to process one-stop activity to a viable OVRD machine. These steps should be followed once the one-stop period is over or the user knows the machine will no longer be used for one-stop voting purposes.

1. Run the Post-Election Audit task (see [One-Stop Post-Election Audit](#)).
2. It is required that a current data transfer is performed (see [Transfer Data from the County BOE](#)) between the end of the one-stop period and Election Day. This guarantees the local machine contains the latest data before Election Day voting begins. If this is not done, the user will receive a warning message upon login.
3. Select *File* → *Information* → *Convert to OVRD* from the Menu bar. A verification pop-up screen, as shown to the right, will display. This allows the user to not continue if they did not wish to start this, as once the conversion is complete, it cannot be undone. Click 'Yes' to continue.
4. A pop-up screen will display alerting the user they must log out and back into the application to complete the conversion process.
5. After logging back into SOSA, the user will be notified that they must select an election site. The options screen will appear. Set any options that are needed (site and alphabet range are required before OVRD will be functional). Please see the OVRD User Manual for further information.



Notice that once conversion is complete, the SOSA screen title has changed to OVRD. Many of the application references have changed to OVRD to reflect Election Day use.

## DOCUMENT CHANGES LOG

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DATE	CHANGES MADE
05/06/2010	Updated OVRD file name (naming convention) and screenshot on page 54.
09/16/2010	Updated screenshots and edited Options section. Added info about “flag as absentee” to chapter 9. Added Site Information section to chapter 8.
02/11/2011	Removed all references to label printing. Updated page 42 with information about passwords now being case sensitive. Updated page 46 with new screenshots showing the print button for Local and Other Site Information.
05/26/2011	Added references to label printing back to document.
10/10/2011	Minor change made to page 50 regarding incomplete applications search (used to be called pending applications).
01/06/2012	Added references for SOSA IPR Confirmation form for new registrations on pages 35-36. Updated chapter 2 and chapter 5 with new messages that may be encountered when performing address updates.
01/18/2013	Updated screen shots. Added Disclaimer
10/10/2013	Reformatted to match admin guide template. Screenshots and text updated.
10/18/2013	Overhaul of entire document: screenshots, formatting, and text data was all updated. Removed OVRD references and put them in a new OVRD only manual.
10/22/2013	Further modifications to screenshot positioning, fixed formatting to match sosa admin guide formatting.
11/04/2013	Final modifications to spelling/grammar/formatting/screenshots
12/09/2013	Updated documentation and screenshots for changes to SOSA Voting
1/9/2014	Updated doc update date and added new note icon to icon section
03/26/2014	Added screenshot of tools ribbon to chapters 6 and 7. Also added to section 6 information on how to print reports from SOSA
10/01/2014	Updated printing screenshots in chapter 6.
02/06/2015	Provisional voting information added to appropriate sections. Updates to multiple chapters for changes and new functionality stemming from the upcoming SOSA release
04/17/2015	Various typo fixes and other updates/removals
07/24/2015	Updated screenshots on multiple pages. Fixed references to Transfer items that moved to the Tools tab. Added 2D Barcode Scanning section.
12/17/2015	Changed references to CONNECTED, HYBRID and DISCONNECTED to COUNTY and LOCAL. Also

	updated corresponding screenshots.
12/18/2015	<p>pg 9-10: updated screenshot and table to add new button "Print Referral"</p> <p>pg 18: updated ID Documents List and screenshot</p> <p>pg 19: added bullets regarding new buttons-Vote Provisional and Print Referral.</p> <p>pg 24-27: updated provisional screenshots and added sections regarding printing an Acknowledgment of Voting Options form (#5) and using the Curbside checkbox and the Reasonable Impediment radio button (#8)</p> <p>pg 29: added screenshots for 2 new DL Expired messages</p> <p>pg 30-32: updated screenshots. added info to #3 regarding new buttons-Vote Provisional and Print Referral. Added Note regarding Religious Objection flag (checkbox).</p> <p>pg 36: updated transfer status screenshot</p> <p>updated screenshots throughout entire document where necessary</p>
01/13/2016	Multiple updates to screenshots and text based on development suggestions/review. Added section for help referral form.
02/02/2016	Several edits to various pages and added back the Same Day Registration instructions
04/15/2016	Updated screenshots of ribbon to reflect new icon labels, updated icon label text in document, and added new section to the reports for the new transaction audit list report
07/21/2016	Updated screenshots throughout as necessary. Added information to NCDL barcode scanning regarding auto-population of voter data.
08/25/2016	Updated help referral form screenshot
08/30/2016	Removed references to Reasonable Impediment
01/27/2017	Updated pg 7 sosa title bar; updated screenshots pg 51
06/29/2017	Updated screenshots throughout and some minor edits