



**SOSA**

**ELECTRONIC POLLBOOK GUIDE**

Durham County Board of Elections

2024 STATEWIDE GENERAL ELECTION



# SOSA

## ELECTRONIC POLLBOOK GUIDE

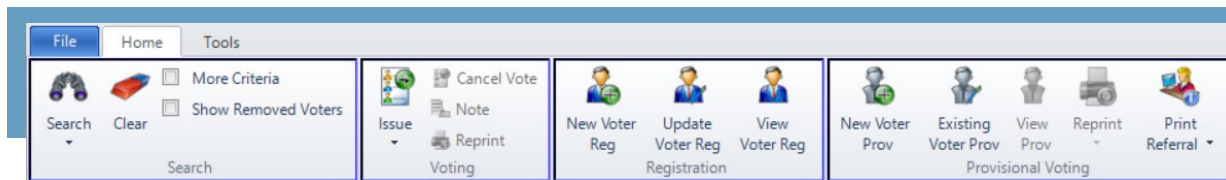
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# SOSA

## EARLY VOTING DATABASE

The Early Voting Application (SOSA) is the electronic poll book used during Early Voting to verify voter registration and check-in voters so they can receive their ballot and vote.



## MAIN TASK BAR

**Search:** Locate voters in SOSA by entering criteria in available fields. Name, DOB, and wildcard (%) options are available.

**Clear:** Remove data entered in the criteria fields.

**More Criteria:** Shows an address criteria field. This should **not** be checked on any computer.

**Show Removed Voters:** Includes all removed voters in the database. This should **only** be checked on the Help Desk computer.

**Issue:** Completes the voter check-in process and produces Early Voting Applications.

**Cancel Vote:** Removes voter history for a voter who was flagged as having voted.

**Reprint:** Prints replacement forms.

**Update Voter Reg:** Used to complete changes to a voter registration record (i.e. name, address).

**New Voter Reg:** Used to process Same-Day Registrations.

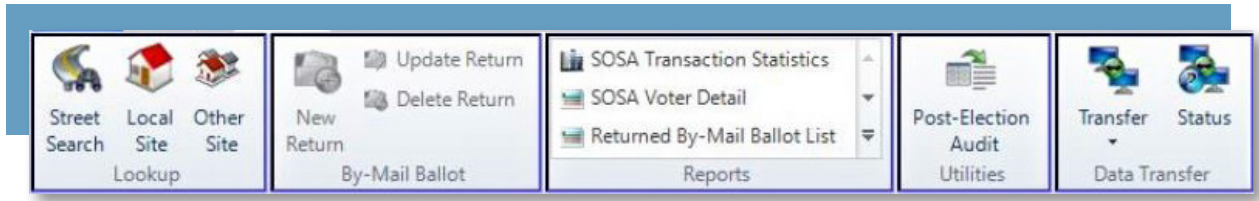
**View Voter Reg:** Used to view a voter's registration record in read only mode.

**New Voter Prov:** Process any voter who is not found in SOSA that requires a provisional ballot.

**Existing Voter Prov:** Process any existing voter that is required to vote a provisional ballot.

**Reprint:** Prints new copies of necessary provisional documents.

**Print Referral:** Prints new copies of Help Desk referral forms.



## SECONDARY NAVIGATION BAR (TOOLS TAB)

**Street Search:** Searches for street specific jurisdictional information.

**Local Site:** Displays information from other sites being used in the county.

**Other Site:** Displays other location information for the county.

**SOSA Transaction Statistics:** Displays SOSA transaction totals for the local machine.

**SOSA Voter Detail:** Displays all voters that have been processed on the local machine.

Do not use unless instructed to do so.







**SOSA Provisional Poll Book:** Displays all voters who have been processed in the provisional module of SOSA.

**Transfer:** Used to transfer voter transaction data to the Board of Elections each day.

**Status:** Displays the Status of a voter history transfer.

## SOSA SYMBOLS AND SEARCH OPTIONS

The following symbols will assist you with processing voters and will serve as guidelines for how to process voters and issue instructions:

	Inactive Voter
	Indicates that the selected voter is eligible to vote in the SOSA site
	Can indicate any of the following: <ul style="list-style-type: none"> <li>• Voter is not eligible in this election</li> <li>• Voter is Removed/Denied</li> <li>• Voter has previously voted</li> </ul>
	Indicates that the voter must provide proof of person before voting (HAVA)
	Indicates the voter does not have a ballot style for the election
	Indicates the voter has been processed through the provisional module

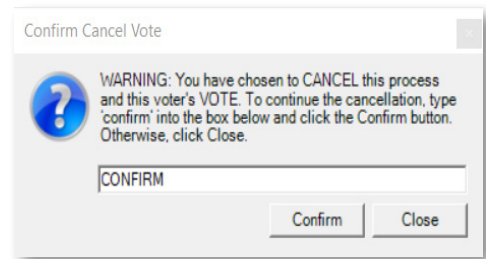
## ADDITIONAL SEARCH OPTIONS ARE AVAILABLE TO EXPEDITE VOTER CHECK-IN:

**% Wildcard:** To use this search option, place a % symbol after the first three letters of the first and last name. **Example:** Last name: SMI% | First name: JOH%. This search option will generate results for voters that match the characters entered. This will significantly expedite voter processing.

**DOB:** Using the Date of Birth field, enter in the voter's DOB and click search. This option will generate all voters with the entered DOB. It is important to clear out all other fields prior to completing this search. **Note:** Voters are not required to provide their Date of Birth.

### CONFIRM CANCEL VOTE MESSAGE

When canceling a voter's record during processing, the 'Confirm Cancel Vote' message will appear when the 'X' or 'Cancel Vote' button is selected. Type 'CONFIRM' and click the 'CONFIRM' button to complete the cancellation.



# EARLY VOTING APPLICATION CHANGES

## STATE BOARD OF ELECTIONS (SBE) UPDATES

There have been no major updates to the Early Voting Application. The most current version of the Early Voting Application is pictured here.

## CURRENT EARLY VOTING APPLICATION

The image shows a sample of the 'EARLY VOTING APPLICATION' form for North Carolina, County of Durham. The form is titled 'EARLY VOTING APPLICATION NORTH CAROLINA COUNTY OF DURHAM' and includes a barcode and a 'Voter's Certification of Voting Qualification' section. The certification section contains several checkboxes for voter eligibility, such as 'I am a registered voter in this county and I shall have resided at the address named above for 30 days immediately prior to this election.' Below this is a section for 'Change or Verification of Name and Address' and a 'Curbside Affidavit' section. The form also includes a signature line and a section for 'OFFICIAL USE ONLY'.

# PHOTO ID PROCESSING TIPS AND REMINDERS

Remember photo identification is required for all voters presenting to vote. Voters who do not have photo ID and wish to vote that day should be directed to the Help Desk with a Help Referral Form to be processed. Most voters will use their driver's license as an acceptable form of ID, but remember there are several acceptable forms of ID voters may present. Use the **Acceptable Voter ID List** to determine if the ID can be used.



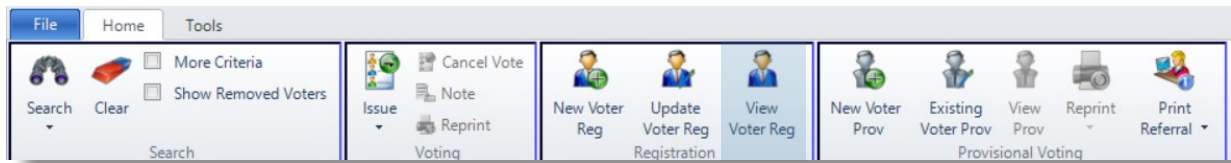
**Note:** New Driver's License and state ID designs will be in use during the 2024 General Election. These new designs are acceptable and should be evaluated just like the older designs.

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**Expired IDs:** The majority of acceptable IDs must be unexpired, or expired for one year or less at the time the voter presents the ID. However, if the voter is over the age of 65 and the ID was unexpired on the voter's 65th birthday, they may use the expired ID regardless of how long ago it expired.

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**Out of State IDs:** Out-of-state IDs may only be used if the voter registered to vote in NC within 90 days of the election. Check-In Operators will have to confirm the voter's registration date in SOSA. This is done by clicking the **View Voter Reg** button while the voter's record is highlighted.



If this voter was presenting an out of state ID for the November 5, 2024 election, their out of state ID **would** be acceptable as 8/11/24 is 86 days before November 5th.



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**Face Coverings:** If the face of the person presenting to vote is covered to such an extent that reasonable resemblance with the photo on the ID cannot be established, then the voter must be made aware and given the opportunity to briefly remove the face covering. If they choose not to remove the covering, then a challenge must be entered on the Help Desk Referral Form. See the "Take Action" section of the Photo ID Evaluation Guide for detailed instructions.

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**Dealing with Difficult Voters:** You may encounter some voters who do not wish to hand over their ID during the check-in process. When dealing with these voters, it is important to remember the following:

- The ideal photo evaluation involves the Check-In or Help Desk Operator being able to physically hold the ID. However, if the voter does not wish to physically hand over their photo ID, it can still be accepted as long as the Check-In or Help Desk Operator feels they are able to effectively evaluate reasonable resemblance.
- While voters must comply with NC election law, Check-In or Help Desk Operators must use common sense and deescalate in situations where the voter is upset.

# PROCESSING A VOTER

**REMINDER:** Photo identification is now required for **all** voters.

1. Ask the voter to state their **first and last name**.
  - If the voter needs to do a name change, see the Name Update section on page 77 of this manual.

2. Enter the voter's last name and first name and click the 'Search' button. When utilizing the search options, enter the first three letters of the voter's first and last name followed by a % symbol. Example: George Washington – Was% Geo%.
  - If multiple records are found, wait until Step 5 to confirm which record to select.

If the voter record is not found, ask if they would be willing to provide their Date of Birth (DOB). Perform a Date of Birth search by clearing all search information and enter in the voter's birthdate. All registered voters with that Date of Birth will appear. Exhaust all search options when looking for a voter registration record before printing a Help Referral Form and directing the voter to the Help Desk Station if they cannot be found in SOSA.

3. Ask the voter for an acceptable form of photo ID. If needed, refer the voter to the **Acceptable Voter ID List**.

- If the voter does not have an acceptable ID, ask the voter if they would like to retrieve and bring back to the polling place to vote a regular ballot. Ensure they know that they can be issued a provisional ballot immediately!
- If the voter does not wish to or is not able to retrieve an acceptable ID, follow the instructions for printing a Help Referral Form in the "Voter Does Not Have Acceptable ID" section of the **Photo ID Evaluation Guide**.



4. Once the ID is confirmed to be acceptable, determine if the photo on the ID bears a reasonable resemblance to the person presenting to vote. See Step 1 of establishing reasonable resemblance in the **Photo ID Evaluation Guide** for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.



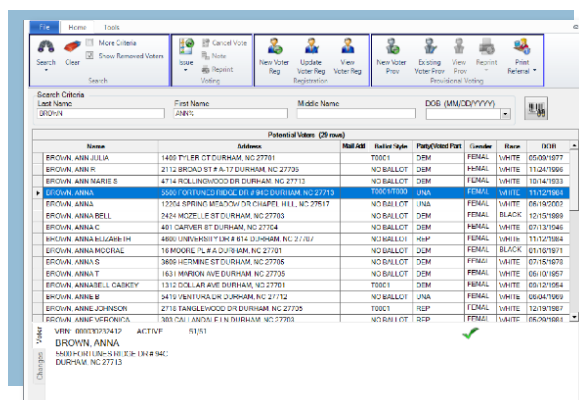
- Use the Date of Birth on the presented ID to confirm the correct voter record has been selected.
  - If the presented ID does not contain a Date of Birth, request the voter's YEAR of birth to verify the correct record has been located. (**Note:** Only request the voter's full DOB if further verification is needed. Voters are not required to share their year or date of birth.)
  - If the voter record still cannot be confirmed after exhausting all options, print a Help Referral Form and direct the voter to the Help Desk Station.

- Once the correct voter record has been selected, determine if the name on the ID is the same or substantially equivalent to the name on the voter's registration record. See Step 2 of establishing reasonable resemblance in the **Photo ID Evaluation Guide** for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.

Then, return the ID to the voter.

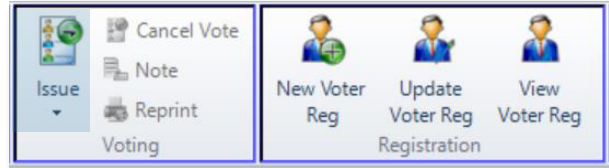
- After returning the ID to the voter, ask the voter to state their current residence address.

A **green check mark** will appear in the Voter Detail pane if the voter is registered and eligible to vote. Select the correct voter record.



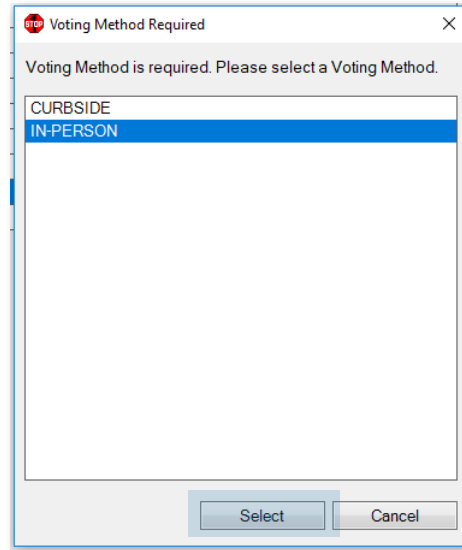
- If the voter has no ballot style, print and complete a **Help Desk Referral Form**, hand it to the voter and direct them to the Help Desk Station. See **Processing an Existing Voter Provisionally** on page 94 of this manual for instructions on how the Help Desk will complete this process.
- If the voter is in Inactive status, go to **Processing an Inactive Voter** on page 86 of this manual for instructions.
- If the voter's stated name is different than that on the voter record, go to **Name Change** on page 77 of this manual for instructions.
- If the voter's stated address is different than that on the voter record, go to **Address Change** on page 81 of this manual for instructions.
- If the voter is HAVA ID required, go to **Processing a HAVA ID Voter** on page 105 of this manual for instructions.

- Repeat the voter's name and residence address and indicate that the voter is duly registered to vote in Durham County.



Then, click the 'Issue' button on the main task bar.

- Select the correct voting method indicating if a voter is inside the site or is voting at curbside. 'IN-PERSON' will be highlighted by default.



Click the 'Select' button to print the Early Voting Application.

- It is important to ensure the voter carefully reads the oath in Section A prior to signing the form.

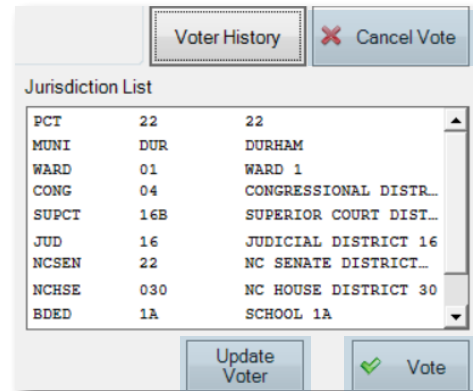
**The voter must sign Section A of the application. After the voter signs, the site worker must initial Section A of the application.**

**Note:** If it is a curbside voter, the Curbside Operator will handle all required signatures including Section A and Section C.

<b>EARLY VOTING APPLICATION</b>		EV-SORL-100-1	Pat	Stati	Party
NORTH CAROLINA COUNTY OF DURHAM		22	B	O	D
G0005		11/05/2024			
FRAUDULENTLY OR FALSELY COMPLETING THIS FORM IS A CLASS F/ELONY UNDER CHAPTER 163 OF THE NC GENERAL STATUTES.					
<b>A Voter's Certification of Voting Qualifications</b>					
BROWN, ANNETTE ANN		REG PARTY: DEM		PREBALE: BAL LOT	
2400 GLENBROOK DR DURHAM, NC 27704		REG DATE: 07/18/2012		AGE: 39	
Mailing Address		PCT: 22		VTD: 22	
I, ANNETTE ANN BROWN, certify that:					
<input checked="" type="checkbox"/> I am a registered voter in this county and I shall have resided at the address noted above for 30 days immediately prior to this election.					
<input checked="" type="checkbox"/> I am a United States Citizen.					
<input type="checkbox"/> I am at least 18 years of age, or will be by the date of the general election.					
<input type="checkbox"/> For partisan primary elections ONLY: I am registered _____ and I will receive a _____ ballot.					
<input checked="" type="checkbox"/> I understand that it is a felony to vote more than one time in an election.					
<input checked="" type="checkbox"/> I have not been convicted of a felony, or if so, I have completed my sentence (including any probation, post-release supervision, or parole).					
<input checked="" type="checkbox"/>					
<b>B Change or Verification of Name and Address</b> (Use this section to verify or change a voter's name or address in the registration records.)					
New Name: _____		Former Name: _____			
New Address: _____		Former Address: _____			
New Mailing Address: _____		Former Mailing Address: _____			
Have you lived here for 30 days or more? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
If yes, date moved: ____ / ____ / ____ I certify that I moved at least 30 days before this election to the new address.					
<input checked="" type="checkbox"/>					
<b>C Curbside Affidavit</b> (Affidavit of person voting outside voting place or enclosure.)					
STATE OF NORTH CAROLINA, COUNTY OF _____					
I do solemnly swear (or affirm) that I am a registered voter in _____ precinct. That because of age or physical disability, I am unable to enter the voting place to vote in person without physical assistance. That I desire to vote outside the voting place or enclosure. I understand that a false statement as to my condition will be in violation of North Carolina law.					
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>					
OFFICIAL USE ONLY					
Station	206627N27M	Ballot Signature	IN-PERSON	Voting Date/Time	08/24/2024 01:20:22 PM
Site	SC05	Transaction	006.1	Operator Name	Melissa

- 
11. After the voter has signed the Early Voting Application, you must click the 'Vote' button to ensure the voter receives voter history. **If you do not do this, you will have discrepancies at the end of the night.**

**Note:** If you need to adjust the voter's record, select 'Update Voter.' If you need to cancel the vote process, click 'Cancel Vote,' type 'CONFIRM' and click the 'CONFIRM' button to complete the cancellation.



- 
12. Direct the voter to the Ballot Station with the Early Voting Application.

**Note:** If the 'Vote' button has already been clicked for the voter, the voter record will update to indicate that the voter has already voted. This does NOT mean that the voter has already voted their actual ballot. It means that the voter has been successfully checked into the SOSA electronic poll book and is ready to receive their correct ballot from the Ballot Station. This information may also be verified by reviewing the 'Voted Date' field under the status symbol.

**If the voter chooses not to vote, the voter history must be canceled using the steps in Flagging a Voter as Canceled on page 91 of this manual.**

**If a voter's Early Voting Application does not print, follow the steps under Reprinting Voter Forms on page 90 of this manual.**

## NAME UPDATE

A name change is required anytime a voter indicates that their name of record is different from their listed name in SOSA.

1. Ask the voter to state their **first and last name**. Enter the voter's last name and first name and click the **'Search'** button. When utilizing the search options, enter the first three letters of the voter's first and last name followed by a % symbol.

**Example:** George Washington – Was% Geo%

If multiple records are found, wait until Step 4 to confirm which record to select.

**Note:** If the voter states they have had a recent name change, or are not sure which name they are registered under, ask if they would be willing to provide their Date of Birth (DOB). Perform a Date of Birth search by clearing all search information and enter in the voter's birthdate. All registered voters with that Date of Birth will appear. Exhaust all search options when looking for a voter registration record before printing a Help Referral Form and directing the voter to the Help Desk Station if they cannot be found in SOSA.

- 
2. Ask the voter for an acceptable form of photo ID. If needed, refer the voter to the **Acceptable Voter ID List**.
    - If the voter does not have an acceptable ID, ask the voter if they have an acceptable ID they would like to retrieve and bring back to the polling place to vote a regular ballot. Ensure they know that they can be issued a provisional ballot immediately!
    - If the voter does not wish to or is not able to retrieve an acceptable ID, follow the instruction for printing a Help Referral Form in the "Voter Does Not Have Acceptable ID" section of the **Photo ID Evaluation Guide**.
- 
3. Once the ID is confirmed to be acceptable, determine if the photo on the ID bears a reasonable resemblance to the person presenting to vote. See Step 1 of establishing reasonable resemblance in the **Photo ID Evaluation Guide** for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.
- 
4. Use the Date of Birth on the presented ID to confirm the correct voter record has been selected.
    - If the presented ID does not contain a Date of Birth, request the voter's YEAR of birth to verify the correct record has been located. (**Note:** Only request the voter's full DOB if further verification is needed. Voters are not required to share their year or date of birth.)
    - If the voter record still cannot be confirmed after exhausting all options, print a Help Referral Form and direct the voter to the Help Desk Station.
-

- Once the correct voter record has been selected, but before updating their voter record, determine if the name on the ID is the same or substantially equivalent to the name on the voter's registration record. See Step 2 of establishing reasonable resemblance in the Photo ID Evaluation Guide for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.

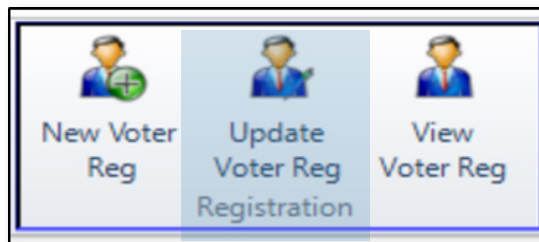
**Note:** If the name on the presented photo ID has is different from the current voter record **and** the voter indicated they have had a name change, this can be considered when determining reasonable resemblance.

Then, return the ID to the voter.

- After returning the ID to the voter, ask the voter to state their current residence address.
 

**Note:** If the voter indicates an address update is also necessary, refer to Address Update on page 81 of this manual.

- Once the voter confirms their residence address proceed with updating the voter's name, click **'Update Voter Reg'** from the main task bar to enter the voter's new name.



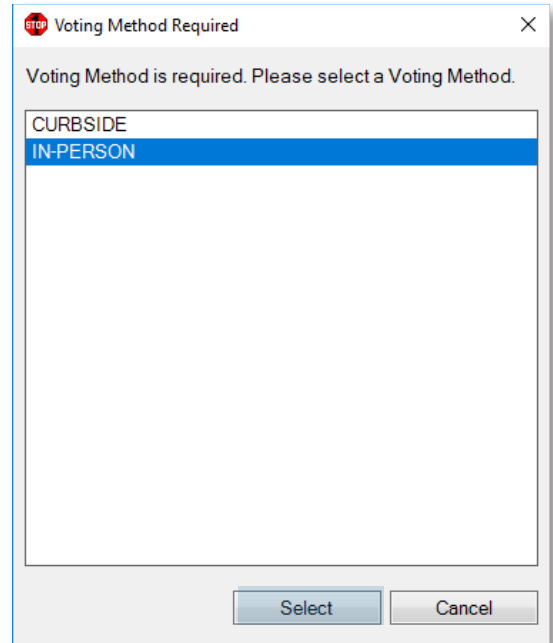
- Clear out the applicable name fields and enter the voter's new name in the appropriate fields.

**Repeat the voter's name and residence address and indicate that the voter is duly registered to vote in Durham County.**

Click **'Review.'**

- Select the correct voting method indicating if a voter is inside the site or is voting at curbside. **'IN-PERSON'** will be highlighted by default.

Click the **'Select'** button to print the Early Voting Application and Change of Name or Address Form.

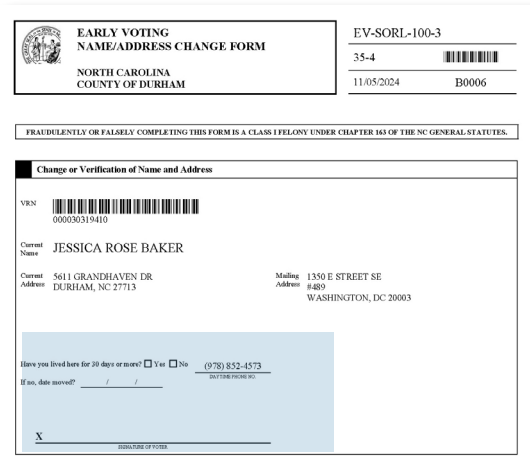


- It is important to ensure the voter carefully reads the oath in **Section A** prior to signing the form.

**The voter must sign Section A of the application. After the voter signs, the site worker must initial Section A of the application.**

**Note:** If it is a curbside voter, the Curbside Operator will handle all required signatures including Section A and Section C.

**The voter must also sign the Change of Name or Address form. Place the Change of Name or Address form in the 'Change Forms' folder.**



11. After the voter has signed the Early Voting Application, you must click the 'Vote' button to ensure the voter receives voter history. **If you do not do this, you will have discrepancies at the end of the night.**

**Note:** If you need to adjust the voter's record, select 'Update Voter.' If you need to cancel the vote process, click 'Cancel Vote,' type 'CONFIRM' and click the 'CONFIRM' button to complete the cancellation.

The screenshot shows a software interface for managing voter records. At the top, there are two buttons: 'Voter History' and 'Cancel Vote'. Below this is a 'Jurisdiction List' table with three columns. The table contains the following data:

PCT	22	22
MUNI	DUR	DURHAM
WARD	01	WARD 1
CONG	04	CONGRESSIONAL DISTR...
SUPCT	16B	SUPERIOR COURT DISTR...
JUD	16	JUDICIAL DISTRICT 16
NCSEN	22	NC SENATE DISTRICT...
NCHSE	030	NC HOUSE DISTRICT 30
BDED	1A	SCHOOL 1A

At the bottom of the interface, there are two buttons: 'Update Voter' and 'Vote'.

12. Direct the voter to the Ballot Station with the Early Voting Application.

**Note:** If the 'Vote' button has already been clicked for the voter, the voter record will update to indicate that the voter has already voted. This does NOT mean that the voter has already voted their actual ballot. It means that the voter has been successfully checked into the SOSA electronic poll book and is ready to receive their correct ballot from the Ballot Station. This information may also be verified by reviewing the 'Voted Date' field under the status symbol.

**If the voter chooses not to vote, the voter history must be canceled using the steps in Flagging a Voter as Canceled on page 91 of this manual.**

**If a voter's Early Voting Application does not print, follow the steps under Reprinting Voter Forms on page 90 of this manual.**

## ADDRESS UPDATE (RESIDENTIAL OR MAILING)

An address change is required anytime a voter indicates that they have moved or had a mailing address change. **IMPORTANT:** Prior to proceeding with the address change, **you must ask the voter if they have resided at their new address for at least 30 days.** If the answer is yes, proceed with the address change. If the answer is no, the voter must vote based on their current residence on file. Mailing address changes can occur at any time.

1. Ask the voter to state their **first and last name**.
  - If the voter needs to do a name change, see the Name Update section on page 77 of this manual.

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2. Enter the voter's last name and first name and click the 'Search' button. When utilizing the search options, enter the first three letters of the voter's first and last name followed by a % symbol. Example: George Washington – Was% Geo%.
  - If multiple records are found, wait until Step 5 to confirm which record to select.

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3. Ask the voter for an acceptable form of photo ID. If needed, refer the voter to the **Acceptable Voter ID List**.
  - If the voter does not have an acceptable ID, ask the voter if they have an acceptable ID they would like to retrieve and bring back to the polling place to vote a regular ballot. Ensure they know that they can be issued a provisional ballot immediately!
  - If the voter does not wish to or is not able to retrieve an acceptable ID, follow the instruction for printing a Help Referral Form in the "Voter Does Not Have Acceptable ID" section of the **Photo ID Evaluation Guide**.

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4. Once the ID is confirmed to be acceptable, determine if the photo on the ID bears a reasonable resemblance to the person presenting to vote. See Step 1 of establishing reasonable resemblance in the **Photo ID Evaluation Guide** for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.

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5. Use the Date of Birth on the presented ID to confirm the correct voter record has been selected.
  - If the presented ID does not contain a Date of Birth, request the voter's YEAR of birth to verify the correct record has been located. (**Note:** Only request the voter's full DOB if further verification is needed. Voters are not required to share their year or date of birth.)
  - If the voter record still cannot be confirmed after exhausting all options, print a Help Referral Form and direct the voter to the Help Desk Station.

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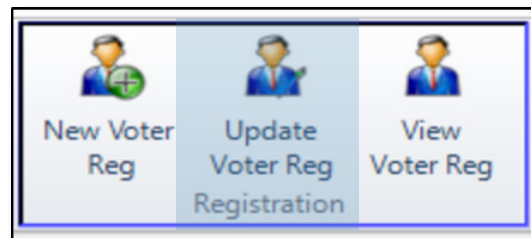


- 
- Once the correct voter record has been selected, determine if the name on the ID is the same or substantially equivalent to the name on the voter's registration record. See Step 2 of establishing reasonable resemblance in the **Photo ID Evaluation Guide** for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.

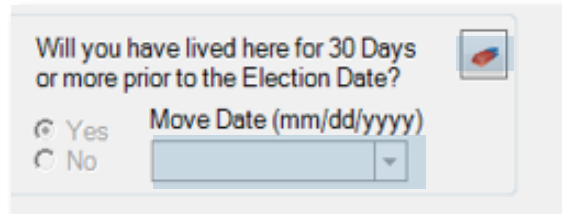
Then, return the ID to the voter.

- 
- After returning the ID to the voter, ask the voter to state their residence address.
- 
- If the voter indicates that they have moved then an address update is needed. Ask the voter to verify whether or not they have lived at the new residence for at least 30 days.**

- 
- After locating the voter and determining that they have an address change, click **'Update Voter Reg'** from the main task bar to enter in the voter's new address.



- 
- Click the red clear stamp and the address data in the residential address fields will depopulate.



- After entering the house number and street name ONLY, click the **'View Street Range'** button to see a list of address ranges. The range selected will be based on whether the house number is Even (E) or Odd (O). Double-click on the appropriate range and all fields excluding 'Unit' will populate. Be sure to add the unit number if required. **Be sure to ask the voter if they have a mailing address that needs to be added or changed!**

**Note:** If the voter's name needs to be updated it can also be done on this screen.

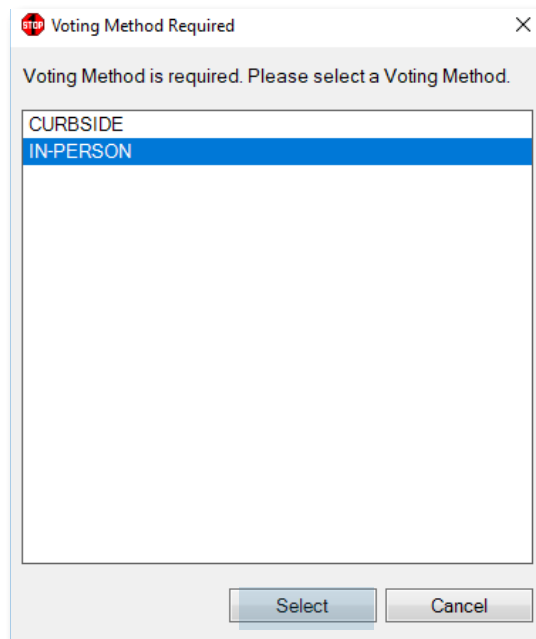
- Repeat the voter's name and residence address and indicate that the voter is duly registered to vote in Durham County.

Click **'Review'** and ensure the voter's information was entered correctly.

Jurisdiction List	DC#	ST
MDR	008	07
MDR	009	07
MDR	010	07
MDR	011	07
MDR	012	07
MDR	013	07
MDR	014	07
MDR	015	07
MDR	016	07
MDR	017	07
MDR	018	07
MDR	019	07
MDR	020	07
MDR	021	07
MDR	022	07
MDR	023	07
MDR	024	07
MDR	025	07
MDR	026	07
MDR	027	07
MDR	028	07
MDR	029	07
MDR	030	07
MDR	031	07
MDR	032	07
MDR	033	07
MDR	034	07
MDR	035	07
MDR	036	07
MDR	037	07
MDR	038	07
MDR	039	07
MDR	040	07
MDR	041	07
MDR	042	07
MDR	043	07
MDR	044	07
MDR	045	07
MDR	046	07
MDR	047	07
MDR	048	07
MDR	049	07
MDR	050	07
MDR	051	07
MDR	052	07
MDR	053	07
MDR	054	07
MDR	055	07
MDR	056	07
MDR	057	07
MDR	058	07
MDR	059	07
MDR	060	07
MDR	061	07
MDR	062	07
MDR	063	07
MDR	064	07
MDR	065	07
MDR	066	07
MDR	067	07
MDR	068	07
MDR	069	07
MDR	070	07
MDR	071	07
MDR	072	07
MDR	073	07
MDR	074	07
MDR	075	07
MDR	076	07
MDR	077	07
MDR	078	07
MDR	079	07
MDR	080	07
MDR	081	07
MDR	082	07
MDR	083	07
MDR	084	07
MDR	085	07
MDR	086	07
MDR	087	07
MDR	088	07
MDR	089	07
MDR	090	07
MDR	091	07
MDR	092	07
MDR	093	07
MDR	094	07
MDR	095	07
MDR	096	07
MDR	097	07
MDR	098	07
MDR	099	07
MDR	100	07

13. Select the correct voting method indicating if a voter is inside the site or is voting at curbside. **'IN-PERSON'** will be highlighted by default.

Click the **'Select'** button to print the Early Voting Application and Change of Name or Address Form.



14. **The voter must sign Section A of the application. After the voter signs, the site worker must initial Section A of the application.**

If it is a curbside voter, the Curbside Operator will handle all required signatures including Section A and Section C.

**The voter must also sign the Change of Name or Address form. Place the Change of Name or Address form in the 'Change Forms' folder.**

15. After the voter has signed the Early Voting Application, you must click the **'Vote'** button to ensure the voter receives voter history. **If you do not do this, you will have discrepancies at the end of the night.**

If you need to adjust the voter's record, select **'Back.'** If you need to cancel the vote process, click **'Cancel Vote,'** type **'CONFIRM'** and click the **'CONFIRM'** button to complete the cancellation.

The screenshot shows a software interface for managing voter history. At the top, there are two buttons: "Voter History" and "Cancel Vote" with a red 'X' icon. Below these is a table titled "Jurisdiction List" with three columns. The table contains the following data:

PCT	22	22
MUNI	DUR	DURHAM
WARD	01	WARD 1
CONG	04	CONGRESSIONAL DISTR...
SUPCT	16B	SUPERIOR COURT DIST...
JUD	16	JUDICIAL DISTRICT 16
NCSEN	22	NC SENATE DISTRICT...
NCHSE	030	NC HOUSE DISTRICT 30
BDED	1A	SCHOOL 1A

At the bottom of the interface, there are two buttons: "Update Voter" and "Vote" with a green checkmark icon.

16. Direct the voter to the Ballot Station with the Early Voting Application.

**Note:** If the 'Vote' button has already been clicked for the voter, the voter record will update to indicate that the voter has already voted. This does NOT mean that the voter has already voted their actual ballot. It means that the voter has been successfully checked into the SOSA electronic poll book and is ready to receive their correct ballot from the Ballot Station. This information may also be verified by reviewing the 'Vote Dated' field under the status symbol.

**If the voter chooses not to vote, the voter history must be canceled using the steps in Flagging a Voter as Canceled on page 91 of this manual.**

**If a voter's Early Voting Application does not print, follow the steps under Reprinting Voter Forms on page 90 of this manual.**

### ADDRESS CHANGE LESS THAN 30 DAYS

If the voter has lived at a new residence address for at least 30 days or more prior to Election Day, you may process the update. **If the voter has not been at the new address for at least 30 days prior to Election Day, you will not update their address, but vote them at the current address.** This voter would be processed under the 'Processing a Voter' section of this manual. A voter may take a registration form to complete and return to the Board of Elections once the voter has resided at the new address for at least 30 days.

## INACTIVE VOTER WITH OR WITHOUT RECORD CHANGES

An inactive voter is a voter that the Board of Elections has not been able to reach via mail, due to a qualifying reason, to confirm their address. Although these are still registered voters, they require an update.

1. Ask the voter to state their **first and last name**.

---

  2. Enter the voter's last name and first name and click the 'Search' button. When utilizing the search options, enter the first three letters of the voter's first and last name followed by a % symbol. Example: George Washington – Was% Geo%.
    - If multiple records are found, wait until Step 5 to confirm which record to select.

---

  3. Ask the voter for an acceptable form of photo ID. If needed, refer the voter to the **Acceptable Voter ID List**.
    - If the voter does not have an acceptable ID, ask the voter if they have an acceptable ID they would like to retrieve and bring back to the polling place to vote a regular ballot. Ensure they know that they can be issued a provisional ballot immediately!
    - If the voter does not wish to or is not able to retrieve an acceptable ID, follow the instruction for printing a Help Referral Form in the "Voter Does Not Have Acceptable ID" section of the **Photo ID Evaluation Guide**.

---

  4. Once the ID is confirmed to be acceptable, determine if the photo on the ID bears a reasonable resemblance to the person presenting to vote. See Step 1 of establishing reasonable resemblance in the **Photo ID Evaluation Guide** for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.

---

  5. Use the Date of Birth on the presented ID to confirm the correct voter record has been selected.
    - If the presented ID does not contain a Date of Birth, request the voter's YEAR of birth to verify the correct record has been located. (**Note:** Only request the voter's full DOB if further verification is needed. Voters are not required to share their year or date of birth.)
    - If the voter record still cannot be confirmed after exhausting all options, print a Help Referral Form and direct the voter to the Help Desk Station.
-

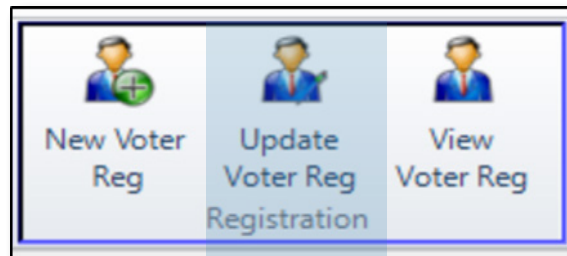
- Once the correct voter record has been selected, determine if the name on the ID is the same or substantially equivalent to the name on the voter's registration record. See Step 2 of establishing reasonable resemblance in the **Photo ID Evaluation Guide** for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.

Then, return the ID to the voter.

- The voter record indicates that the voter is inactive. The voter's record needs to be updated to Active status by using the **'Update Voter Reg.'**



- To proceed with processing an inactive voter, click **'Update Voter Reg.'**



- Ask the voter to state their current residence address. If the voter indicates they have moved, **ask the voter to verify whether or not they have lived at the new residence for at least 30 days.**

The voter may make a change to their name, residential address, or mailing address when updating their voter record. If the voter is making a change to their name, clear out the applicable name fields and enter the voter's new name.

If the voter is making a change to their residential address, click the **'View Street Range'** button to see a list of address ranges. Choose between Even (E) and Odd (O) street numbers when using the street index. To update a voter's mailing address, click the **red clear stamp** by the mailing address field to clear any existing information and type in the voter's address in the appropriate fields.

**Repeat the voter's name and residence address and indicate that the voter is duly registered to vote in Durham County** and click **'Review.'**

10. Select the correct voting method indicating if a voter is inside the site or is voting at curbside.

Click the **'Select'** button to print the Early Voting Application and Change of Name or Address Form.

**Note: Even if a voter did not make a change when going through the update process, a Change of Name or Address Form will print since the voter was in Inactive status.** The voter will be required to sign this form even if there are not changes on the form to confirm that their record is correct.

11. **The voter must sign Section A of the application. After the voter signs, the site worker must initial Section A of the application.**

If it is a curbside voter, the Curbside Operator will handle all required signatures including Section A and Section C.

**The voter must also sign the Change of Name or Address form. Place the Change of Name or Address form in the 'Change Forms' folder.**

12. Click the **'Vote'** button to ensure the voter receives voter history. **If you do not do this, you will have discrepancies at the end of the night.**

If you need to adjust the voter's record, click **'Back.'** If you need to cancel the vote process, click **'Cancel Vote,'** type **'CONFIRM'** and click the **'CONFIRM'** button to complete the cancellation.

The screenshot shows a software interface with a 'Jurisdiction List' table. At the top right, there are two buttons: 'Voter History' and 'Cancel Vote'. Below the table, there are two buttons: 'Update Voter' and 'Vote'.

Jurisdiction List		
PCT	22	22
MUNI	DUR	DURHAM
WARD	01	WARD 1
CONG	04	CONGRESSIONAL DISTR...
SUPCT	16B	SUPERIOR COURT DIST...
JUD	16	JUDICIAL DISTRICT 16
NCSEN	22	NC SENATE DISTRICT...
NCHSE	030	NC HOUSE DISTRICT 30
BDED	1A	SCHOOL 1A

13. Direct the voter to the Ballot Station with the Early Voting Application.

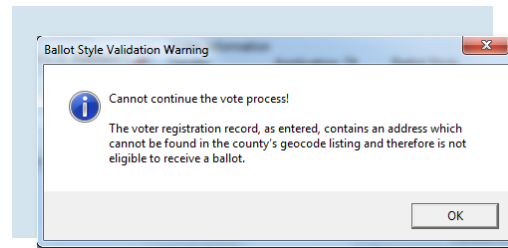
**Note:** If the 'Vote' button has already been clicked for the voter, the voter record will update to indicate that the voter has already voted. This does NOT mean that the voter has already voted their actual ballot. It means that the voter has been successfully checked into the SOSA electronic poll book and is ready to receive their correct ballot from the Ballot Station. This information may also be verified by reviewing the 'Voted Date' field under the status symbol.

**If the voter chooses not to vote, the voter history must be canceled using the steps in Flagging a Voter as Canceled on page 91 of this manual.**

**If a voter's Early Voting Application does not print, follow the steps under Reprinting Voter Forms on page 90 of this manual.**



## OUT OF COUNTY VOTERS OR GEOCODE ISSUES

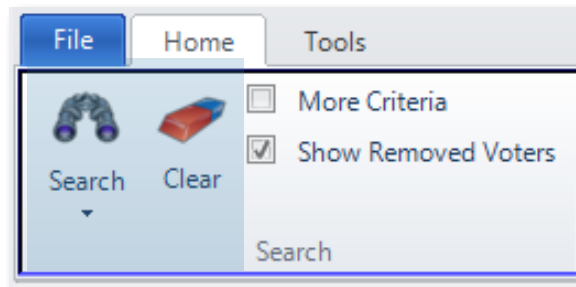


If a voter has a residential address that is not in Durham County's geocode, you will receive the error message above, while attempting to update the voter. All voters providing addresses responsive to this scenario, must be referred to the Help Desk to vote a Provisional Ballot.

## REPRINTING VOTER FORMS

If an Early Voting Application does not print due to toner, paper or other error, perform the following steps to reprint the form(s).

1. Use the **'Clear'** button to clear out the search fields. **'Search'** for the voter in the poll book.
2. Once found, select the voter's record.
3. Click **'Reprint'** under the 'Home' tab.



Search Criteria

Last Name: BROWN First Name: ANNE Middle Name: ANN DOB (MM/DD/YYYY): 04/10/1982

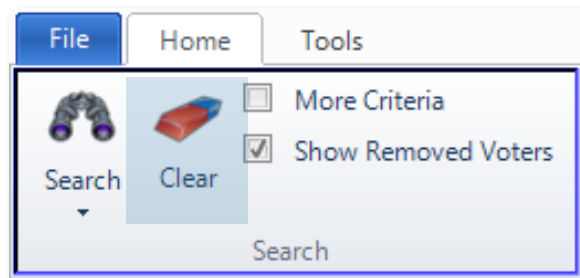
Name	Address	Mail Addr	Ballot Style	Party	Gender	Race	DOB
BROWN, ANN JULIA	1409 TYLER CT DURHAM, NC 27701		G0005	DEM	FEMALE	WHITE	03/12/1942
BROWN, ANNA ELIZABETH	5500 FORTUNES RIDGE DR # 94C DURHAM, NC 27713		G0001	UNA	FEMALE	WHITE	04/17/1999
BROWN, ANNA GARDNER	11303 SPRING MEADOW DR CHAPEL HILL, NC 27517	X	G0001	UNA	UNDESI	UNDESI	12/12/1957
BROWN, ANNABELL CASKEY	1312 DOLLAR AVE DURHAM, NC 27701		G0005	DEM	FEMALE	WHITE	11/20/1976
BROWN, ANNE JOHNSON	2718 TANGLEWOOD DR DURHAM, NC 27705		G0005	REP	FEMALE	WHITE	12/27/1955
BROWN, ANNETTE ANN	2400 GLENBROOK DR DURHAM, NC 27704		G0005	DEM	FEMALE	BLACK O	04/10/1982
BROWN, ANNETTE JOHNSON	314 GLADSTONE DR DURHAM, NC 27703		G0006	DEM	FEMALE	BLACK O	05/22/1987

## FLAGGING A VOTER AS CANCELED

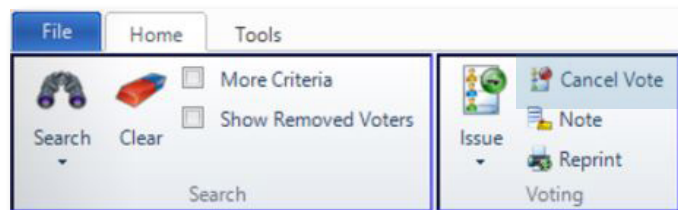
If you have checked in a voter in the electronic poll book and it is determined that this was done in error (examples: wrong voter chosen, or voter decides not to vote), you may cancel the vote on the machine that the voter was checked in on.

**Cancel the vote by following the steps below:**

1. Click the **'Clear'** button to clear the search fields. Click **'Search'** to locate the voter in SOSA. Once found, select the voter's record.



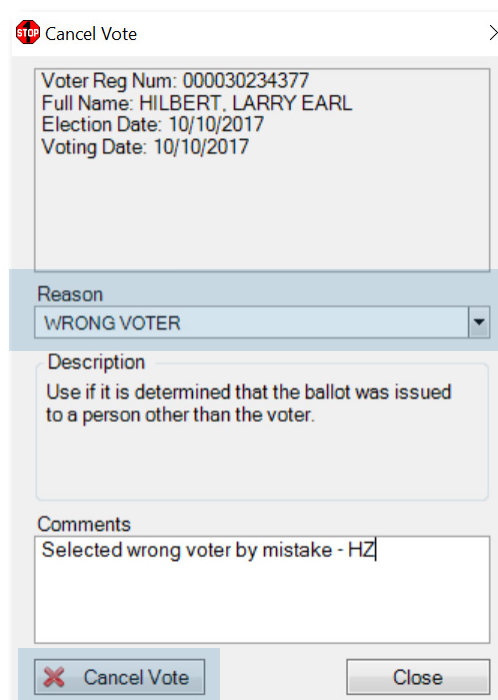
2. Click the **'Cancel Vote'** button in the voting pane.



3. In the Cancel Vote box, choose a reason from the drop-down menu. **Be sure to provide details in the 'Comments' section followed by your initials.**

Click **'Cancel Vote.'** Mark through the Early Voting Application Form and write 'Canceled'. Place the canceled form in your Canceled/Misc Forms folder.

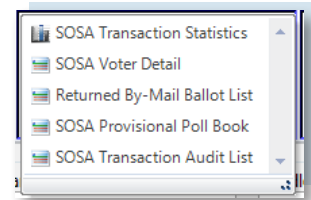
**Note:** If the voter who was canceled appears to vote, they can be processed on the same computer during Early Voting.

A screenshot of a 'Cancel Vote' dialog box. The dialog box has a title bar with a red stop sign icon and the text 'Cancel Vote'. Inside the dialog box, there is a text area containing the following information: 'Voter Reg Num: 000030234377', 'Full Name: HILBERT, LARRY EARL', 'Election Date: 10/10/2017', and 'Voting Date: 10/10/2017'. Below this information is a 'Reason' dropdown menu with 'WRONG VOTER' selected. Underneath the dropdown is a 'Description' text area with the text: 'Use if it is determined that the ballot was issued to a person other than the voter.' Below the description is a 'Comments' text area with the text: 'Selected wrong voter by mistake - HZ'. At the bottom of the dialog box, there are two buttons: 'Cancel Vote' (with a red X icon) and 'Close'.

# PRINTING SOSA STATISTICS/DETAIL REPORTS

There are five reports that can be printed in SOSA. You can choose the parameters for each report before viewing and/or printing.

The reports can be found under the 'Tools' tab and will provide:



## SOSA Transaction Statistics Report

This provides detail on the number of votes, new registrants, provisionals, updates, notes, and cancellations that are processed on a specific machine. It is most useful to resolve ballot reconciliation discrepancies when completing the Tabulator Match Sheet.

DURHAM COUNTY BOARD OF ELECTIONS SOSA TRANSACTION STATISTICS								
WHERE machine_nbr = '100'								
	Machine	All Votes	Cancels	Actual Votes (votes_canceled)	Updated Registrations	New Registrations	Provisionals	Notes
Election Site:	NCCU	100	5	0	5	1	1	0
Total:		5	0	5	1	1	0	0

## SOSA Voter Detail

This provides a detailed list of voters that have been processed on a specific machine at the Early Voting Site. It is most useful to resolve ballot reconciliation discrepancies when completing the Tabulator Match Sheet.

DURHAM COUNTY BOARD OF ELECTIONS SOSA VOTER DETAIL										
WHERE machine_nbr = '100' and site_nbr = 'NCCU' and vts_b BETWEEN '9/11/2017' and '9/11/2017'										
Name/VRN#	Address	Vote Type	Ballot Number	Party	Vote Date	Age	Gender	Race	Election Site	Machine
BOWENS, DEREK	2112 SOUTHWEST CROSSING DURHAM, NC 27715	V	1000007	DEM(DEN)	09/11/2017	30			NCCU	100
Votes: 1										
Cancels: 0										
Actual Votes: 1										

## Returned By-Mail Ballot List

This provides a detailed list of voters' that have returned Absentee Ballots to the Early Voting Site. **This report is not used by the Durham County Board of Elections.**

DURHAM COUNTY BOARD OF ELECTIONS RETURNED BY-MAIL BALLOT LIST									
Voter Name	VRN	Delivery Name	Relationship to Voter	Application Number	Return Date	Election Site	Machine	Update Operator	Name
HART, DEBORAH S		00000541008	Derek Bowens	0PMANDCHILD	09/11/2017	NCCU	100	05ADMN	
Total Ballots: 1									

## SOSA Provisional Poll Book

This provides detail on the number of Provisional Ballots processed at the Early Voting Site. This report must be printed at the end of each night, if you processed provisional voters that day, and placed in the orange provisional bag with Provisional Ballots.

DURHAM COUNTY BOARD OF ELECTIONS SOSA PROVISIONAL POLL BOOK						
OS Site: NCCU ONE STOP						
Machine ID: 100						
Election: 10/10/2017 PRIMARY						
Count	Poll Book No.	Voter Name& address	Ballot Style Issued	Voted Date	PN Number	
1	NCCU-100-1	WEBB, REBEKAH BARLOW 21 SUNRISE PL DURHAM, NC 27705	N001	09/11/2017	BL87-100-1	
Grand Total: 1						

## SOSA Transaction Audit List

This provides detail on all transactions performed at the Early Voting Site. This report is most useful if you have a discrepancy between the number of Early Voting Applications, ballots cast, and machine totals.

DURHAM COUNTY BOARD OF ELECTIONS SOSA TRANSACTION AUDIT LIST							
Type = 'Absentee', Machine = '100', Date Range = 'ALL'							
Ballot (for Form) = '100', Connection = 'LOCAL'							
Name	Application Number	Record Type	Completed Vote Process	Process Date	Ballot ID		
BOWENS, DEREK	OS-BDR-100-1	ISSUE VOTE	N	10/07/2018 10:13:32 PM	100-1		
BOWENS, DEREK	OS-BDR-100-2	ISSUE VOTE	N	10/07/2018 10:14:10 PM	100-2		
BOWENS, DEREK	OS-BDR-100-3	ISSUE VOTE	N	10/07/2018 10:16:53 PM	100-3		
BOWENS, DEREK	OS-BDR-100-4	ISSUE VOTE	N	10/07/2018 10:18:23 PM	100-4		
BOWENS, DEREK	OS-BDR-100-5	ISSUE VOTE	Y	10/07/2018 10:20:50 PM	100-5		
HART, DEBORAH S	OS-BDR-100-6	UPDATE VOTER	N	10/07/2018 11:00:39 PM	100-6		
ADAMS, ONELIA	OS-BDR-100-7	ISSUE VOTE	N	10/07/2018 11:54:38 PM	100-7		
Complete: 1							
Incomplete: 6							
Total: 7							

To print any of these reports, click the printer icon at the top of the document preview.

# HELP DESK

## HELP DESK REFERRALS

Voters are directed from the Check-In Station to the Help Desk Station if:

- They are not listed in the poll book.
- They do not have a photo ID and wish to vote that day.
- Reasonable resemblance cannot be established with the presented photo ID.
- They need to show HAVA ID.
- They need to be processed as a Same-Day Registrant.
- They have any other situation that requires a Provisional Ballot.

**Note:** Any voter that is referred to the Help Desk is required to have a Help Referral Form. This form will be placed in the Help Referral Form folder unless instructed otherwise under this section of the manual.

### NO VOTER SHOULD BE TURNED AWAY

Site workers shall not turn away any person who presents themselves to vote. Anyone who wishes to vote MUST be allowed the opportunity to do so even if it is by way of a provisional ballot. Be sure all voters review the affirmation section of all forms to ensure they are aware of eligibility requirements.

# PROCESSING AN EXISTING VOTER PROVISIONALLY

After exhausting all search options, it may be determined that a voter with an existing voter record must vote a provisional ballot. In most situations, these voters will have a **Help Desk Referral Form** with information from the voter's record already filled in.

Remember: No voter should ever be turned away at the polls.

1. Review the Help Desk Referral Form provided by the voter. Utilize the **'Voter's Information'** section of the form to expedite voter record search when possible.
  - If the 'ID Not Provided' box is checked on the Help Desk Referral Form, provide the voter with the **Photo ID Exception Guide** and ask if one of the photo ID exceptions applies to them OR if they wish to return to the BOE office with an acceptable ID before the county canvass. This information will be used later when selecting the provisional voting reason. Then proceed to locate the voter's record and continue to Step 7.
  - If the 'Name Not Substantially Equivalent' or 'No Reasonable Resemblance' boxes are checked, notify the Site Coordinator so that a Reasonable Resemblance Evaluation Hearing can be held. The Site Coordinator will instruct on next steps depending on the outcome of the hearing. If the reasonable resemblance challenge is sustained, the **Help Desk Referral Form** will be placed in the clear plastic sleeve of the provisional envelope along with the voter's provisional application. If the voter does not want to vote provisionally, or the challenge is not sustained, place the Help Desk Referral Form in the Help Referral Form Folder and complete an Incident Report.
  - If none of the aforementioned reasons are listed, proceed with Step 2.

---

2. Refer to the voter's **Help Desk Referral Form** for their **first and last name**.

---

3. Enter the voter's last name and first name and click the 'Search' button. When utilizing the search options, enter the first three letters of the voter's first and last name followed by a % symbol. Example: George Washington – Was% Geo%.
  - If multiple records are found, wait until Step 6 to confirm which record to select.

---

4. Ask the voter for an acceptable form of photo ID. If needed, refer the voter to the **Acceptable Voter ID List**.
  - **Note:** If the voter does not have an acceptable form of ID continue with the provisional process as outlined in the following steps.

---

5. Once the ID is confirmed to be acceptable, determine if the photo on the ID bears a reasonable resemblance to the person presenting to vote. See Step 1 of establishing reasonable resemblance in the **Photo ID Evaluation Guide** for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.
  - **Note:** For issues related to no acceptable form of ID, this step does not apply.

- 
6. Use the Date of Birth on the presented ID to confirm the correct voter record has been selected.
    - If the presented ID does not contain a Date of Birth, request the voter's YEAR of birth to verify the correct record has been located. (**Note:** Only request the voter's full DOB if further verification is needed. Voters are not required to share their year or date of birth.)
- 

7. Once the correct voter record has been selected, determine if the name on the ID is the same or substantially equivalent to the name on the voter's registration record. See Step 2 of establishing reasonable resemblance in the **Photo ID Evaluation Guide** for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.

Then, return the ID to the voter.

- **Note:** For issues related to no acceptable form of ID, this step does not apply.
- 

8. **Repeat the name and residence address back to the voter.**

- If the voter needs to update their name or address, this can be done on the first **'Provisional (Existing) Data Entry'** screen after clicking **'Existing Voter Prov.'**
- 

9. Click **'Existing Voter Prov'** to process the voter.
- 

10. Review the voter's information and click **'Next'** to move forward or click **'Cancel Vote'** if the voter chooses not to move forward with the voting process. If the voter changes their mind about completing the provisional process, click the **'Acknw Only'** button. The voter is not required to sign the form indicating they were offered the option to vote provisionally, but they are encouraged to do so. Regardless of whether the voter signs or not, place the form in the Canceled/Misc Forms folder.

- **Note:** It is possible that a **Proof of ID** window will appear. If this happens, refer to Step 8 of 'Processing a New Voter Provisionally' on page 99 of this manual.
- 

11. Select the **Provisional Voting Reason** from the dropdown on the 'Provisional (Existing) Data Entry' screen.
  - **Note:** If the voter is voting provisionally via curbside, check the **'Curbside'** box.

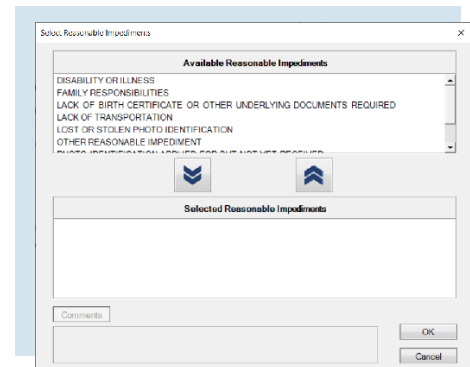
**Note:** Three of the provisional reasons in the dropdown menu will require the voter to sign an **'ID Exception Form'**;

- v. ID Not Provided- Exception – Natural Disaster
  - For voters who were victims of a natural disaster within 100 days of the election, as declared by the President of the United States or the Governor of NC.
- v. ID Not Provided- Exception – Religious Objection
  - For voters who have a religious objection to being photographed.
- v. ID Not Provided- Exception – Reasonable Impediment
  - For voters who have a reasonable impediment preventing them from showing a Photo ID\*.

The voter must sign the ID Exception Form. It will later be inserted into the front cover of the Provisional Envelope.

\*If 'ID Not Provided – Exception – Reasonable Impediment' is selected as the provisional voting reason, upon clicking **'Review'**, the **'Available Reasonable Impediment'** menu will appear. Voters must choose one or more of the following choices from this menu:

- Disability or Illness
- Family Responsibilities
- Lack of Birth Certificate or Other Underlying Documents Required
- Lack of Transportation
- Lost or Stolen Photo Identification
- Photo Identification Applied for but not yet Received
- State or Federal Law Prohibits Listing the Impediment
- Work Schedule
- Other Reasonable Impediment
  - If this reason is one of the choices, an additional window will appear requiring explanation of the reasonable impediment that was not an available option.



Once an option is selected, click the **'Down'** arrow to move it to the **'Selected Reasonable Impediments'** box.

12. If necessary, click the **'Ballot Style Override'** button on the 'Provisional (Existing) Data Entry' screen to update the ballot style. The **Ballot Style Issued** field will automatically populate the voter's default ballot style. However, in some scenarios, the ballot style may need to be updated. Examples of reasons to change the ballot style are:

- The voter wishes to vote in a race that is not on their default ballot style.
- Voter does not have a ballot style.

Clicking the **'Ballot Style Override'** button will bring up the **'Provisional Ballot Style Override'** window where the correct ballot style can be selected. Select the voter's desired ballot style from the "Ballot Style" dropdown.

13. Click the **'Review'** button to continue. The pre-populated Provisional Voting Application will print. Have the voter review the application and sign the 'Voter's Affirmation of Eligibility to Vote' section. The site worker must sign where it reads 'Election Official Signature.' Click 'Vote' to process the voter.

**If you need to make changes on the application, click the 'Previous' button and review the voter's information.**

14. The voter's provisional ballot instructions will print. If the voter was required to show ID and did not have it, place emphasis on the ID reminder section on the bottom of the form (highlighted) and print the voter an **Acceptable Voter ID List** from the **Election Admin Folder**.



# PROCESSING A NEW VOTER PROVISIONALLY

After exhausting all search options, it may be determined that the voter must vote a provisional ballot. In situations where a voter could not be found at the Check-In Station, they will have a **Help Desk Referral Form** with the first and last name handwritten.

Remember: No voter should ever be turned away at the polls and **Same-Day registration is an option available for voters who are not registered!**

1. Review the **Help Desk Referral Form** provided by the voter. Search for the voter in SOSA again to ensure they do not have a voter record.
  - If the 'ID Not Provided' box is checked on the Help Desk Referral Form, provide the voter with the **Photo ID Exception Guide** and ask if one of the photo ID exceptions applies to them OR if they wish to return to the BOE office with an acceptable ID before the county canvass. This information will be used later when selecting the provisional voting reason.
  - If the 'No Reasonable Resemblance' box is checked, notify the Site Coordinator so that a Reasonable Resemblance Evaluation Hearing can be held. The Site Coordinator will instruct on next steps depending on the outcome of the hearing. If the reasonable resemblance challenge is sustained, the **Help Desk Referral Form** will be placed in the clear plastic sleeve of the provisional envelope along with the voter's provisional application. If the voter does not want to vote provisionally, or the challenge is not sustained, place the Help Desk Referral Form in the Help Referral Form Folder and complete an Incident Report.
  - If none of the aforementioned reasons are listed, proceed to Step 2.

2. Click '**New Voter Prov**' to process the voter.

Remember: If the voter is an existing voter, but not eligible to vote, you can select '**Existing Voter Prov**.' This option will prepopulate all information on the existing voter record. For instructions on processing an existing voter provisionally go to page 94 of this manual.

3. Enter all information highlighted in yellow. This includes: U.S. Citizenship Confirmation, First and Last Name, Date of Birth, House Address Number and Street Name, 30-Day Residency Question, Gender, Race, Party, Phone Number and either their NC Driver's License, the last 4 digits of their SSN, or check the "No Identification # to Provide" box.

The screenshot shows a 'Provisional Data Entry' form with several sections. Yellow highlights are placed on the following fields: 'U.S. Citizen' (with a dropdown menu), 'First Name', 'Last Name', 'Date of Birth', 'House Address' (including fields for House Number, Street Name, and Type), '30-Day Residency Question', 'Gender', 'Race', 'Party', 'Phone Number', 'NC Driver's License' (with a dropdown menu), 'Last 4 Digits of SSN' (with a dropdown menu), and the 'No Identification # to Provide' checkbox.

- 
4. After entering the required information, **repeat the name and residence address back to the voter.**
- 
5. Ask the voter for an acceptable form of photo ID. If needed, refer the voter to the **Acceptable Voter ID List.**
- **Note:** If the voter does not have an acceptable form of ID continue with the provisional process as outlined in the following steps.
- 
6. Once the ID is confirmed to be acceptable, determine if the photo on the ID bears a reasonable resemblance to the person presenting to vote and if the name provided by the voter in Step 3 is the same or substantially equivalent to the name on the ID. See Step 1 of establishing reasonable resemblance in the **Photo ID Evaluation Guide** for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.
- **Note:** For issues related to no acceptable form of ID, this step does not apply.
- 
7. Review the voter's information and click **'Next'** to move forward or click 'Cancel Vote' if the voter chooses not to move forward with the voting process. If the voter changes their mind about completing the provisional process, click the **'Acknw Only'** button. The voter is not required to sign the form indicating they were offered the option to vote provisionally, but they are encouraged to do so. Regardless of whether the voter signs or not, place the form in the Canceled/Misc Forms folder.
- 
8. The **'Proof of ID Required'** HAVA ID prompt will appear. Provide the voter with the **'Notice to Voters with No Acceptable ID'** form for a list of acceptable ID's. The voter may provide one of the documents listed on the form via electronic means. If the voter does not have one of the ID's listed, click **'NO ID'** and proceed with the provisional process. If the voter chooses not to proceed with the provisional process, select **'Cancel.'**
- If the voter has one of the acceptable forms of HAVA ID, choose the type of ID presented and click **'Select'**. The voter may provide the same ID used to establish reasonable resemblance in earlier steps. However, to satisfy the HAVA ID requirement, the photo ID must have the voter's current name and address and be unexpired.
- 
9. Select the **Provisional Voting Reason** from the dropdown on the 'Provisional (New) Data Entry' screen.
- **Note:** If the voter is voting provisionally via curbside, check the **'Curbside'** box.

The screenshot shows a web form titled "Provisional Voting Reason". It features a dropdown menu at the top. Below the dropdown is a checkbox labeled "Curbside". The form is organized into two columns of input fields. The first column contains "Party Voted" and "Ballot Style Issued" (with the value "B0006" entered). The second column contains "Default Ballot Style" (with the value "B0006" entered) and "Ballot Style Precinct" (with the value "16" entered). At the bottom of the form is a button labeled "Ballot Style Override".

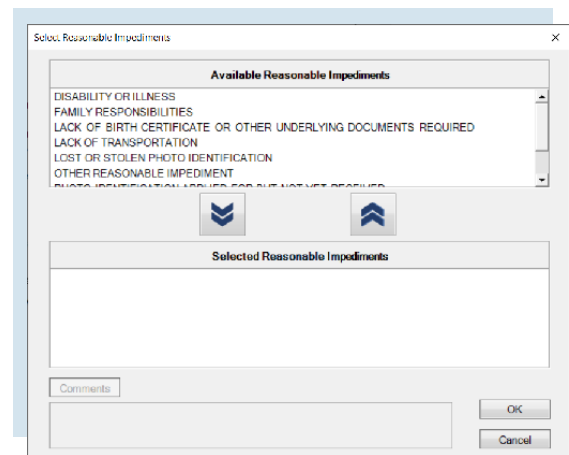
**Note:** Three of the provisional reasons in the dropdown menu will require the voter to sign an **'ID Exception Form'**;

- v. ID Not Provided- Exception – Natural Disaster
  - For voters who were victims of a natural disaster within 100 days of the election, as declared by the President of the United States or the Governor of NC
- v. ID Not Provided- Exception – Religious Objection
  - For voters who have a religious objection to being photographed.
- v. ID Not Provided- Exception – Reasonable Impediment
  - For voters who have a reasonable impediment preventing them from showing a Photo ID\*.

The voter must sign the ID Exception Form. It will later be inserted into the front cover of the Provisional Envelope.

\*If 'ID Not Provided – Exception – Reasonable Impediment' is selected as the provisional voting reason, upon clicking **'Review'**, the **'Available Reasonable Impediment'** menu will appear. Voters must choose one or more of the following choices from this menu:

- Disability or Illness
- Family Responsibilities
- Lack of Birth Certificate or Other Underlying Documents Required
- Lack of Transportation
- Lost or Stolen Photo Identification
- Photo Identification Applied for but not yet Received
- State or Federal Law Prohibits Listing the Impediment
- Work Schedule
- Other Reasonable Impediment
  - If this reason is one of the choices, an additional window will appear requiring explanation of the reasonable impediment that was not an available option.



Once an option is selected, click the **'Down'** arrow to move it to the **'Selected Reasonable Impediments box'**.

10. If necessary, click the **'Ballot Style Override'** button on the 'Provisional (New) Data Entry' screen to update the ballot style. The **Ballot Style Issued** field will automatically populate the voter's default ballot style. However, in many scenarios, the ballot style will need to be updated. Examples of reasons to change the ballot style are:

- The voter wishes to vote in a race that is not on their default ballot style.
- Voter does not have a ballot style.

Clicking the **'Ballot Style Override'** button will bring up the **'Provisional Ballot Style Override'** window where the correct ballot style can be selected. Select the voter's desired ballot style from the "Ballot Style" dropdown.

11. Click the **'Review'** button to continue. The pre-populated Provisional Voting Application will print. Have the voter review the application and sign the 'Voter's Affirmation of Eligibility to Vote' section. The site worker must sign where it reads 'Election Official Signature.' Click 'Vote' to process the voter.

**If you need to make changes on the application, click the 'Previous' button and review the voter's information.**


12. The voter's provisional ballot instructions will print. If the voter was required to show ID and did not have it, place emphasis on the ID reminder section on the bottom of the form (highlighted) and print the voter an **Acceptable Voter ID List** from the **Election Admin Folder**.

## PROVISIONAL BALLOTS


1. Using the Provisional Voting Application, complete the **'POLL WORKERS COMPLETE'** section on the back of the provisional envelope. Most of this information can be found on the bottom of the Provisional Voting Application. **It is VERY important to leave clear and precise notes in the "Additional Notes for BOE" section of the provisional envelope.** This section is used during post-election audits. (See provisional ballot form example on next page.)
2. Bring the Provisional Voting Application to the Ballot Station to retrieve the appropriate ballot. The Ballot Station Operator will stamp the word **'PROVISIONAL'** at the top of the ballot in the designated section and trifold the ballot. (See image below).
3. Once the ballot is retrieved from the Ballot Station, place the Provisional Voting Application in the clear plastic sleeve of the envelope and seal.
  - If the reasonable resemblance challenge is sustained, the **Help Desk Referral Form** will be placed in the clear plastic sleeve of the provisional envelope along with the voter's provisional application. If the voter does not want to vote provisionally, or the challenge is not sustained, place the Help Desk Referral Form in the Help Referral Form Folder and complete an Incident Report.
4. Ensure that the ballot has been trifolded prior to giving it to the voter.
5. Instruct the voter to sit behind the privacy screen or the booth designated for provisional voters and provide the voter the ballot and provisional envelope. If the voter requires additional assistance any site worker may provide assistance, given it is consistent with the Voter Assistance Section on page 47 of this manual.
6. The voter must place their ballot in the provisional envelope and return it to the Help Desk Station.
7. Place the sealed envelope in the designated orange Provisional Bag.

Sample Ballot  
Durham County, North Carolina  
October 10, 2023

**PROVISIONAL**

**T0001**  
  
Typ:01 Seq:0001 Spl:01

**BALLOT MARKING INSTRUCTIONS**  
A. With the marking device provided or a black ball point pen, completely fill in the oval to the left of each candidate or selection of your choice as shown.  
B. If you tear, deface or wrongly mark this ballot, return it to request a replacement.



# PROVISIONAL BALLOT EXAMPLE

The highlighted fields and arrows below indicate the important information required for the **POLL WORKERS COMPLETE** section of the provisional envelope.

<b>PROVISIONAL VOTING APPLICATION - DURHAM COUNTY</b>		ELECTION: <b>10/10/2023</b>	PB: <b>EAST-100-1</b>
Location Voted: <b>EAST</b>	PIN:	Existing Voter VRN:	
<b>VOTER REGISTRATION/UPDATE FORM</b>			
ARE YOU A CITIZEN OF THE UNITED STATES OF AMERICA? YES <input checked="" type="checkbox"/> NO <input type="checkbox"/>		IF YOU CHECKED "NO" IN RESPONSE TO EITHER OF THESE QUESTIONS, DO NOT COMPLETE THIS FORM.	
WILL YOU BE AT LEAST 18 YEARS OF AGE ON OR BEFORE ELECTION DAY? YES <input checked="" type="checkbox"/> NO <input type="checkbox"/>			
LAST NAME: SMITH	FIRST NAME: CHELSEA	MIDDLE NAME: ANN	SUFFIX:
RESIDENTIAL ADDRESS (STREET ADDRESS WHERE YOU NOW LIVE):		CITY:	STATE   ZIP   COUNTY:

## POLL WORKERS COMPLETE

Date Ballot Cast: <u>9/22/23</u>	<b>Additional Notes for BOE</b> <u>DON'T FORGET TO WRITE GOOD NOTES!</u> Worker Initials <div style="border: 1px solid black; padding: 5px; display: inline-block; font-size: 2em;">PW</div>
Voter's Name: <u>Chelsea Smith</u>	
Poll Book No.: <u>EAST-100-1</u>	
Voting Precinct: <u>35-5</u>	
Ballot Style Issued: <u>T0001</u>	

**Indicate Provisional Voting Reason**

<input type="checkbox"/> INCORRECT PRECINCT	<input type="checkbox"/> INCORRECT PARTY	<input type="checkbox"/> NOT REGISTERED
<input type="checkbox"/> JURISDICTION DISPUTE	<input type="checkbox"/> UNREPORTED MOVE	<input checked="" type="checkbox"/> NO ID PROVIDED
<input type="checkbox"/> VOTER ALREADY VOTED	<input type="checkbox"/> ADDRESS NOT FOUND	<input type="checkbox"/> ID EXCEPTION FORM
<input type="checkbox"/> PREVIOUSLY REMOVED	<input type="checkbox"/> EXTENDED HOURS VOTING	

I have not been convicted of a felony, or if so, I have completed my sentence (including probation, post-release supervision, or parole).  
 ▼ My reasons for voting provisionally are noted below ▼

The election official cannot find a record of my registration. **(No Record of Registration)**

I submitted a voter registration application to the DMV, either in-person or online on \_\_\_\_\_, My driver license number is \_\_\_\_\_.

I submitted a voter registration application to \_\_\_\_\_ (specify agency, board of elections office, or another person) on \_\_\_\_\_.

I moved within my county and my voter registration was not updated prior to election day. **(Unreported Move)**

I am choosing to vote at a voting place assigned to a precinct in which I do not live. **(Incorrect Precinct)**

I am voting provisionally due to a photo ID issue: ID NOT PROVIDED - NO EXCEPTION FORM/RETURN WITH ID

My voter registration was previously cancelled but I believe I am eligible to vote today. **(Previously Removed)**

I am choosing to vote a ballot style for a party of which I am not shown to be registered. **(Incorrect Party)**

The election official cannot locate my residential address in their records to determine my proper ballot style. **(Unrecognized Address)**

The registration records indicate that I have already voted in this election. **(Voter Already Voted)**

I dispute the \_\_\_\_\_ election district to which I am assigned. I believe I live in \_\_\_\_\_ election district. **(Jurisdiction Dispute)**

I am voting during extended voting hours. **(Voting During Extended Hours)**

Other: \_\_\_\_\_

FRAUDULENTLY OR FALSELY COMPLETING THIS FORM IS A CLASS I FELONY UNDER CHAPTER 163 OF THE NC GENERAL STATUTES

Provisional Voter's Signature: \_\_\_\_\_ Election Official Signature: \_\_\_\_\_

Date/Time: 09/22/2023	Site: EAST	Station: BOEHN4KQ73-L
Operator: egalloway	Trans ID: 1009	PIN: BL101-100-1
HAVA ID Provided: _____	<input type="checkbox"/> Curbside	
VoterView Precinct: 35-5	Provisional Precinct: 35-5	Ballot Style Issued 
VoterView Party: UNA	Provisional Party: UNA	
VoterView Ballot: T0001	Provisional Ballot: T0001	

## HAVA ID VOTER

Certain first-time voters who registered by mail and did NOT provide their Driver's License Number OR the last 4 digits of their Social Security Number on their registration form, are required to show a HAVA ID as required by State and Federal law. All HAVA ID required voters will be assisted at the Help Desk Station unless the Site Coordinator authorizes completion by the Check-In Operator.

The 'Notice to Voters with No Acceptable ID' form will be displayed at the Help Desk Station. This form provides a full list of HAVA ID options for voters to present. HAVA documents must be current. Of the documents listed in the 'Notice to Voters with No Acceptable ID', any valid non-photo ID document or government-issued photo ID document can be presented electronically.

### EXAMPLES OF ACCEPTABLE DOCUMENTS ARE AS FOLLOWS:

#### DOCUMENTS NOT ISSUED BY A GOVERNMENTAL AGENCY:

- Utility Bill (including mobile service providers).
- Bank Statement.
- Paycheck (government or nongovernment).

#### VALID DOCUMENTS SHOWING NAME AND CURRENT ADDRESS

- Driver's license or ID card issued by NC or another state.
- Citizenship document issued by the U.S. Department of Homeland Security or U.S. Citizenship and Immigration Services.
- Property tax statement or vehicle registration issued by a governmental agency.
- Government check, including any Social Security, employment, pension, benefit, or reimbursement check from any government entity.
- Government invoice, statement, or receipt.
- Public housing identification card, lease or rental statement.
- Public educational institution documents, including any student card, transcript, tuition statement, invoice, or receipt issued by any public educational institution.
- Government insurance plan card, drug discount card, or drug prescription issued by a government care facility (including military and veterans' facilities).
- Discharge certificates, pardons, or other government documents issued in connection with the resolution of a criminal case, indictment, sentence, or other matter.
- Public transportation authority cards, invoices, receipts, or correspondence.
- Public assistance or disability agency documents.
- Documents issued by any government shelter or temporary/transitional housing facility.
- Drug prescription issued by a government doctor or other governmental health care provider.

If voters required to show HAVA ID do not have one of the acceptable ID types to satisfy the HAVA requirement, the voter must proceed with the provisional process. Check-In Operators will be provided with a copy of the 'Notice to Voters with No Acceptable ID' document.

## PROCESSING A HAVA ID VOTER

1. Ask the voter to state their **first and last name**.

---

2. Enter the voter's last name and first name and click the 'Search' button. When utilizing the search options, enter the first three letters of the voter's first and last name followed by a % symbol. Example: George Washington – Was% Geo%.
  - If multiple records are found, wait until Step 5 to confirm which record to select.

---

3. Ask the voter for an acceptable form of photo ID. If needed, refer the voter to the **Acceptable Voter ID List**.
  - If the voter does not have an acceptable ID, ask the voter if they have an acceptable ID they would like to retrieve and bring back to the polling place to vote a regular ballot. Ensure they know that they can be issued a provisional ballot immediately!
  - If the voter does not wish to or is not able to retrieve an acceptable ID, follow the instruction for 'Processing an Existing Voter Provisionally' on page 94 of this manual.

---

4. Once the ID is confirmed to be acceptable, determine if the photo on the ID bears a reasonable resemblance to the person presenting to vote. See Step 1 of establishing reasonable resemblance in the **Photo ID Evaluation Guide** for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.

---

5. Use the Date of Birth on the presented ID to confirm the correct voter record has been selected.
  - If the presented ID does not contain a Date of Birth, request the voter's YEAR of birth to verify the correct record has been located. (**Note:** Only request the voter's full DOB if further verification is needed. Voters are not required to share their year or date of birth.)

HAVA voters will have the **blue HAVA ID** symbol in the voter detail pane.



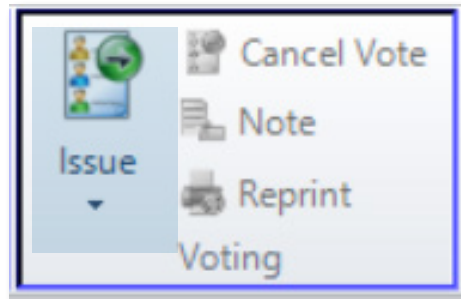


6. Once the correct voter record has been selected, determine if the name on the ID is the same or substantially equivalent to the name on the voter's registration record. See Step 2 of establishing reasonable resemblance in the Photo ID Evaluation Guide for detailed instructions and guidelines, as well as steps to take if reasonable resemblance cannot be established.

Then, return the ID to the voter.

7. **Repeat the voter's name and residence address and indicate that the voter is duly registered to vote in Durham County.**

Click the **'Issue'** button on the main task bar.



8. The **'Proof of ID Required'** HAVA ID prompt will appear. Provide the voter with the **'Notice to Voters with No Acceptable ID'** form for a list of acceptable ID's. The voter may provide one of the documents listed on the form via electronic means. If the voter does not have one of the ID's listed, click **'Cancel'** and begin the provisional voting process with the voter. If the voter has one of the acceptable forms of HAVA ID, choose the type of ID presented and click **'Select'**.

- The voter may provide the same ID used to establish reasonable resemblance. However, to satisfy the HAVA requirement, the photo ID must be current and valid, except that the address does not have to be current. If the voter presents a HAVA document, it must include the voter's current name and residence address.

9. Select the correct voting method indicating if a voter is inside the site or is voting at curbside. **'IN-PERSON'** will be highlighted by default.

Click the **'Select'** button to print the Early Voting Application.

10. It is important to ensure the voter carefully reads the oath in **Section A** prior to signing the application.

**The voter must sign Section A of the application. After the voter signs, the site worker must initial Section A of the application.**

If it is a curbside voter, the Curbside Operator will handle all required signatures including Section A and Section C.

11. After the voter has signed the Application, you must click the **‘Vote’** button to ensure the voter receives voter history. **If you do not do this, you will have discrepancies at the end of the night.**

If you need to adjust the voter’s record, select **‘Update Voter.’** If you need to cancel the vote process, click **‘Cancel Vote,’** type “CONFIRM” and click the **‘Confirm’** button to complete the cancellation.

Jurisdiction Code	District	District Name
PCT	22	22
MUNI	DUR	DURHAM
WARD	01	WARD 1
CONG	04	CONGRESSIONAL DISTR...
SUPCT	16B	SUPERIOR COURT DIST...
JUD	16	JUDICIAL DISTRICT 16
NCSEN	22	NC SENATE DISTRICT...
NCHSE	030	NC HOUSE DISTRICT 30
BDED	1A	SCHOOL 1A

12. Direct the voter to the Ballot Station with the Early Voting Application if the voter is voting in person.

**Note:** If the ‘Vote’ button has already been clicked for the voter, the voter record will update to indicate that the voter has already voted. This does NOT mean that the voter has already voted their actual ballot. It means that the voter has been successfully checked into the SOSA electronic poll book and is ready to receive their correct ballot from the Ballot Station. This information may also be verified by reviewing the ‘Voted Date’ field under the status symbol.

**If the voter chooses not to vote, the voter history must be canceled using the steps in Flagging a Voter as Canceled on page 91 of this manual.**

**If a voter’s Early Voting Application does not print, follow the steps under Reprinting Voter Forms on page 90 of this manual.**

## PROCESSING A SAME-DAY REGISTRATION

During the Early Voting voting period, individuals who are not registered to vote, and meet all other requirements under the law, may register to vote. **All same-day registrants must provide a proof of residency document as shown on the 'Notice to Same-Day Registrants' form.** The voter can provide either the original document or a copy of that document in paper or electronic format, including by showing the document on a cell phone.

**Note: If a voter is 17 years of age and will be 18 by the date of the General Election, the voter will be eligible for same-day registration.**

1. Ask the voter to state their **first and last name**.

---

2. Enter the voter's last name and first name and click the '**Search**' button. When utilizing the search options, enter the first three letters of the voter's first and last name followed by a % symbol. Ex: George Washington – Was% Geo%

If the voter record is not found, **search SOSA again** to ensure there were no spelling errors. If the record is still not found, perform a **Date of Birth search** by clearing all search information and enter in the voter's birthdate. All registered voters with that Date of Birth will appear. Exhaust all search options when looking for a voter registration record before beginning a Same-Day Registration.

---

3. Ask the voter if they plan on voting today.
    - If they do not plan on voting the same day they're registering, be sure the voter knows they will have to wait until the second day following their initial appearance at the site to vote so the registration can be processed and their record is accessible in SOSA. Additionally, they need to know that they **MUST** vote during the Early Voting period and may not vote on Election Day.
    - If the voter says they do not plan on voting in the current election and wish to register so they can vote in the subsequent election, **DO NOT** complete a Same-Day Registration. Instead, print a Voter Registration Form from the Election Admin Folder on the desktop of the laptops. Upon completion, place the application in the Black Accordion Folder in the Misc. Registration Forms section.
-

- 
4. **Ask the voter if they have one of the forms of ID listed on the 'Notice to Same-Day Registrants' form with current name and address.**
    - If the voter does not have one of the forms of identification, find out if they are a student that lives on campus at NCCU or Duke. If they are, see if their residency can be verified with a student ID and the Student Address Verification Database according to the instructions on page 113.
    - If they say no, you may start the provisional process. The voter may also leave and come back before the close of early voting with an acceptable proof of residency document.
- 

5. After completing all search options, verifying that the voter is not registered to vote, and that the voter has an acceptable proof of residency ID as listed on the **'Notice to Same-Day Registrants' form, the voter must complete a Voter Registration Application page from the Same-Day Registration pad. The voter MUST sign this form!**

**Note:** If the voter did not include an email or phone number when completing the application, ask the voter if they would be willing to include them. Although technically not required, these two pieces of contact information will help ensure the BOE can resolve any issues that may prevent the voter's registration from being processed or ballot from being counted.

- 
6. **Retrieve the signed Voter Registration Application.**
    - If the voter indicated in Step 3 that they wish to vote today, click the **'New Voter Reg'** button and continue with the following steps.
    - If the voter indicated in Step 3 that they will not be voting today, place the signed Voter Registration Application in the red **Same-Day Registrations folder** and complete an Incident Report.

- Using the information from the signed Voter Registration Application (fields in red), enter the required voter information into the **'New Registration'** screen:

**Note:** Fields in red are required.

- **Confirmation of U.S. Citizenship**
- **Last Name**
- **First Name**
- **Date of Birth**
- **Voter Verification**

**Note:** Voters will need to provide either their NC Driver's License number, the last 4 of their Social Security number, or check the box that they do not have either. Although this section is not red in SOSA, you will not be allowed to move forward with process until one of these three items are selected.

- **Residential Address**

**Note:** Before inputting a voter's residence address, confirm they can receive mail at this address. If not, they need to submit a mailing address. The voter needs to know that a verification card must be delivered to the address through the US Postal Service. If the card is returned to the BOE office as **'undeliverable'**, their registration and ballot could be denied.

- **30-Day Residency Question**
- **Party**

**Note:** Remember, when entering the residential address, you **ONLY** need to put in the **'House #'** and **'Street Name'**. Once you do this, click the **'View Street Range'** button and select the appropriate range based on the house number (Even or Odd). If the voter is a student and lives on campus, see the Student Verification Database instructions on page 113 of this manual.

There is not an email address field on the **'New Registration'** screen. If the voter included one on their form, you do not need to enter it into SOSA. BOE staff will enter it during future processing.

- 
- Recite the name and address to the voter for verification.** If changes are needed, make the appropriate edits. If the voter does not want to proceed with the process, click **'Cancel Vote.'**

Click the **'Review'** button.

- 
- Select the type of ID provided by the voter to establish proof of residency. (Remember, any valid non-photo ID document or government-issued photo ID document with current name and residence address can be presented electronically.)

Click **'Select.'**

- 
- Select the correct voting method indicating if a voter is inside the site or is voting at curbside. **'IN-PERSON'** will be highlighted by default.

Click the **'Select'** button to print the Voter Registration Application.

11. The Voter Registration Application will print. **Have the voter review and sign the document.** If there are errors on the registration form, click '**Back**' to make updates. **Staple both signed forms together and place them in the red folder for Same-Day Registrations.**
- If the voter has signed the Voter Registration Form, but decides that they do not wish to vote that day, click '**Cancel Vote**'. A Confirm Cancel Vote box will appear. Type CONFIRM and click '**Confirm**'. Ignore the 'Canceled Vote Documents Information' warning that appears after and click '**OK**'. Complete a detailed Incident Report with the voter's information and place the stapled Same-Day Registration applications in the red folder for Same-Day Registrations.

- 
12. **Repeat the voter's name and residence address and indicate that the voter is duly registered to vote in Durham County.**
- 

13. Ask the voter for an acceptable form of photo ID. If needed, refer the voter to the **Acceptable Voter ID List**.

Use the **Photo ID Evaluation Guide** to determine the next steps. If you are able to confirm the ID is acceptable, examine the provided photo ID to complete step 1 only of establishing reasonable resemblance as is outlined in the **Photo ID Evaluation Guide**. Then, return the ID to the voter.

- 
14. Click '**Vote**' to proceed. This will print the voter's Early Voting Application.
- 

15. It is important to ensure the voter carefully reads the oath in **Section A** prior to signing the application.

**The voter must sign Section A of the application. After the voter signs, the Official must initial Section A of the application.**

If it is a curbside voter, the Curbside Operator will handle all required signatures including Section A and Section C.

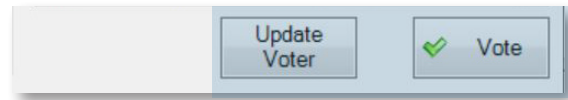
- 
16. Direct the voter to the Ballot Station with the Early Voting Application.

**Note:** If the 'Vote' button has already been clicked for the voter, the voter record will update to indicate that the voter has already voted. This does NOT mean that the voter has already voted their actual ballot. It means that the voter has been successfully checked into the SOSA electronic poll book and is ready to receive their correct ballot from the Ballot Station. This information may also be verified by reviewing the 'Voted Date' field under the status symbol.

**If a voter's Early Voting Application does not print, follow the steps under Reprinting Voter Forms on page 90 of this manual.**

## CANCELING A SAME-DAY REGISTRATION

If the 'Vote' button is clicked for a voter, the voter record will update to indicate that the voter has already voted. The voter will have a printed Same-Day Registration Form and Early Voting Application once they are



successfully checked in as a new voter. **If a voter completes this process and decides to vote at a later time, the Same-Day Registration CANNOT be cancelled in the SOSA Electronic Poll Book.**

1. Write **Spoiled** on the Early Voting Application.
2. **The Site Coordinator must complete a detailed Incident Report** for the voter stating their intent to not complete the voting process. Include the voter's information on the electronic form.
3. Staple the spoiled Early Voting Application to both signed Same-Day Registration applications.
4. Place the three stapled documents in the red folder for Same-Day Registrations.

**IMPORTANT NOTE:** Since this cancellation cannot occur in the SOSA voting application, the closing totals for Early Voting voter history will be greater than the ballots cast at closing. It is important to account for this occurrence to reconcile your totals. **The BOE will reconcile this count for your site upon receiving the produced records and incident report at the nightly audit.**

## STUDENT ADDRESS VERIFICATION DATABASE (USED FOR SAME-DAY REGISTRATION)

Eligible prospective registrants may use the Student Address Verification Database to satisfy the proof of residency requirement for Same-Day Registration. This database is for students who live on campus at Duke University or North Carolina Central University and do not have proof of residency. The following conditions apply to the use of the Student Address Verification Database.

# USING THE STUDENT ADDRESS VERIFICATION DATABASE

## NCCU Requirements

NCCU students living on campus can meet the proof of residency requirement for Same-Day-Registrations by providing an ID from the **Acceptable Photo ID** List and being found in the **Student Address Verification Database**.

An NCCU Student ID is **NOT** required for this process.

## Duke Requirements

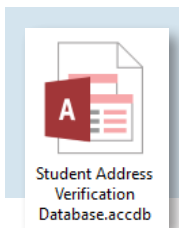
Duke students living on campus can meet the proof of residency requirement for Same-Day Registrations using the **Student Address Verification Database** if they present a **Duke Student Voter ID** or **Duke Card (Student ID)**.

Electronic Duke Student IDs cannot be accepted.

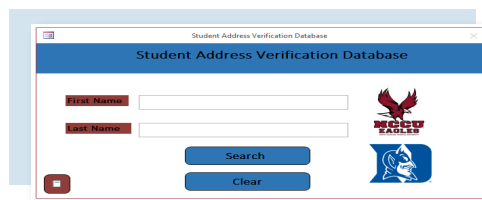
Complete the following to confirm residency on campus:

1. Open the Student Address Verification Database. This is found on the desktop of the Help Desk laptop.
2. The Student Address Verification Database will open. Enter the voter's first name and last name, in full or in part, and click the 'Search' button.
  - **Note:** If you have a student by the name of 'Derek Bowens', you can enter 'Der' and 'Bow' and the database will pull back any individual with those letter combinations in their name. You can also do a search on First OR Last Name only. If the student is in the database, a report will appear with the student's name and on-campus residence. The report will also include the applicable institution.
3. If the voter is found, the database can be used to satisfy the proof of residency requirement for Same-Day Registration.

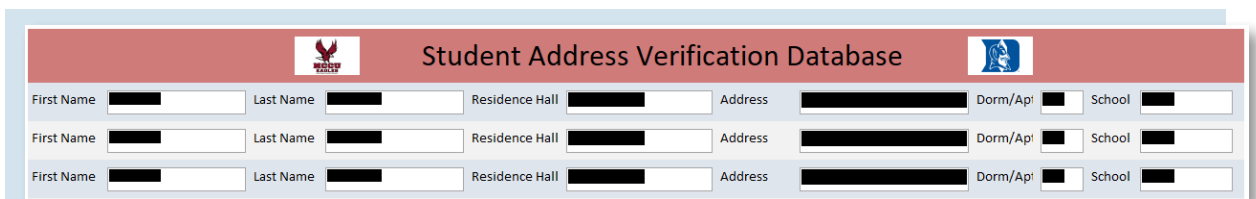
1



2



3





# ENTERING STUDENT ADDRESS INFORMATION IN SOSA

It is very important that address information for NCCU or Duke students living on campus is entered very precisely into SOSA using the guidelines below. Submissions with incorrect or incomplete addresses could result in the student's registration being denied or their ballot not counted.

For the Student Address Verification Database to satisfy the proof of residency requirement, **only the address listed in the database can be used as the residence address**. If the student states that the address listed in the database is not their current residence address, they will be required to provide another proof of residency document as listed on the '**Notice to Same-Day Registrants**.'

## **Duke Students**

The student's residence address must be entered into SOSA as it appears in the Student Address Verification Database, if it is being used for proof of residency. For Duke students that opt to use the database, the address will often be '**1400 West Main Street, Durham, NC 27705**' (East Campus) or '**440 Chapel Drive, Durham, NC 27708**' (West Campus). However, some Duke students may live on Central Campus. These are apartments owned by Duke University but fall outside Duke's East and West Campus. These students' addresses will be listed in the database with the street address of their apartment complex.

Duke students must also provide a mailing address. They may enter any mailing address they wish. However, if the student wishes to receive their mail on campus, the mailing address must be filled out as follows:

**NOTE: Students living on Central Campus may use their residence address or Duke Campus Box.**

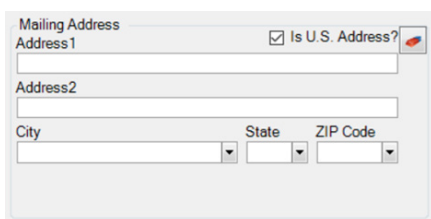
- Address1: ***Duke Campus Box XXXXXX***
- City: ***Durham***
- State: ***NC***
- Zip Code: ***27708***

## **NCCU Students**

NCCU students must provide their full name, including first, middle (if applicable), and last name when completing a Same-Day Registration. This helps ensure that the NCCU Student Mail Center directs the student's mail to the correct person.

The student's residence address must be entered into SOSA as it appears in the Student Address Verification Database, if it is being used for proof of residency. For NCCU students that opt to use the database, this often be '**1801 Fayetteville Street, Durham, NC 27707**'.

NCCU students must also provide a mailing address. They may enter any mailing address they wish. However, if the student wishes to receive their mail on campus, the mailing address must be filled out as follows:



The image shows a screenshot of a web form titled "Mailing Address". It includes a checkbox labeled "Is U.S. Address?" which is checked. Below the checkbox are two text input fields: "Address1" and "Address2". At the bottom of the form are three dropdown menus labeled "City", "State", and "ZIP Code".

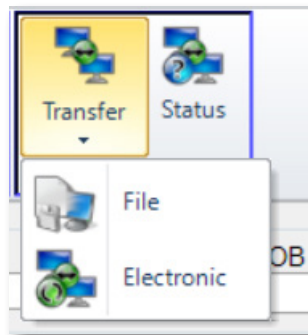
- Address1: ***1801 Fayetteville St.***
- Address2: ***Dorm Room Name and Number***
- City: ***Durham***
- State: ***NC***
- Zip Code: ***27707***

## DATA TRANSFER

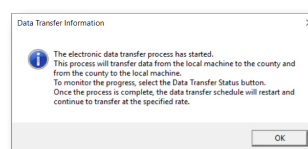
After the site has closed, on each machine, you will need to perform an electronic transfer to the Board of Elections. To complete this, do the following on each machine.

1. Click the **'Tools'** tab.

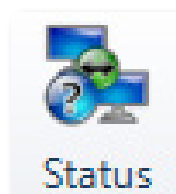
2. Click the **'Transfer'** button and select **'Electronic.'**



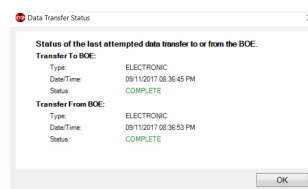
3. Click **'OK'** to the data transfer message that appears.



4. Click the **'Status'** button to confirm that the transfer was completed and occurred after the close of the site and the last voter has voted.



5. If there are any issues completing the transfer, call the Board of Elections immediately!





**DURHAM**  
**COUNTY**

Board of Elections