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1. SYSTEM REQUIREMENTS

- Windows Operating Systems 7 or higher
- Connecticut EMS is fully supported on the following browsers:
  - Internet Explorer: Version 9.0 or higher
  - Firefox: Version 4.0 or higher
  - Safari: 4.0 or higher
  - Google Chrome: 28.0 or higher
- Minimum screen resolution 1280 x 758 to 1266 x 768

2. REGISTRAR LOGIN

**Purpose:** To allow the Registrar to log in with assigned permissions, change a password, and report a problem to or get help from State Admin (SOTS).

*Figure 2-1 Login screen*
Figure 2-2 First Time User Registration screen

How to Create First Time User - Registrar

1. The Login page will be displayed in the browser (Fig. 2-1).
2. Click on the “First Time Logging In?” link in the “Login Information” section.
3. The system will display the First Time User Registration screen (Fig. 2-2).
4. Select the town from the “Town” dropdown and “Registrar” from the “Select Role” dropdown. Enter information. Required fields are marked with a red asterisk.
5. Click the “Submit” button. The system will display an alert message. Select OK to close the pop-up.
6. The system will send a request to State Admin for approval of the new user.
7. Once State Admin has approved the user, the system will send a notification email to the Registrar’s email address that was entered on the First Time User Registration screen.
8. The Registrar will now be able to log in from the Login page (Fig. 2-1). In the “Login Information” section, select “Registrar” from the “Select Role” dropdown, enter Username and Password, and click the “Login” button.
9. Passwords expire in 90 days, at which time the user is prompted to enter a new password. The prompt for the password change will begin 10 days prior to the password expiration date. Please note that you may not use any of your last 3 passwords.

Note: Passwords must be between 8-26 characters long and must contain at least one character from three of these four character types:

- Uppercase alpha
- Lowercase alpha
- Numeric
- Special character
How to Log In
1. SOTS will send Registrars the URL for the live system. Enter the URL in the browser’s address bar and click Enter.
2. Select “Registrar” from the “Select Role” dropdown and enter the Registrar Username and Password on the Login Screen (Fig. 2-1). If logging in for the first time, see Section 2 How to Create a First Time User – Registrar.
3. Click the “Login” button.

How to Change a Password
1. From the Dashboard, select the “Maintenance” tab and click on “Change Password” to display the Change Password screen (Fig. 2-3).
2. Enter the Old Password, enter the New Password, and re-enter the New Password. Click the “Change Password” button. The system displays an alert message.

**Figure 2-3 Change Password screen**

![Change Password Screen](image)

**Note:** Passwords must be between 8-26 characters long and must contain at least one character from three of these four character types:
- **Uppercase alpha**
- **Lowercase alpha**
- **Numeric**
- **Special character.**

Please note that you may not use any of your last 3 passwords.

**NOTES:**

How to Report a Problem or Get Help - from the Login Screen
1. From the Login page, click on the “Report a Problem or Get Help” link (Fig. 2-4).
2. System displays the **Report a Problem or Get Help** screen (Fig. 2-5).

**Figure 2-5 Report a Problem or Get Help screen**

![Report a Problem or Get Help screen](image)

3. Enter information and summarize your problem or question in the "Message" section. Be sure to include your email address. You may attach a file using the "Browse" feature.

4. Click the **Send Message** button. Your message, attachments, and contact information will be sent to the State Admin EMS dashboard.

3. **REGISTRAR DASHBOARD**

**Purpose:** To allow the Registrar to access the functionality of the Connecticut Election Management System.
The Dashboard Basics
Once the user has logged in successfully, the system will display the Dashboard (Fig. 3.1), with the following tabs across the top of the screen that allow the user to access the Connecticut Election Management System functions:

- Dashboard
- Candidates
- Reports
- Head Moderator’s Return
- View Stats
- View Question Results
- Maintenance

Figure 3-1 Registrar Dashboard

1. The Dashboard will display four sections: “Active Elections,” “Office Requests,” “Ballot Ordered Requests” and “Question Requests” (Fig. 3-1). The system will display Active Elections only for the town in which the Registrar is logged in.
2. The Registrar can view the Offices List, List of Nominees, Grids Report, and Winners Report for an election by clicking the respective link in the “Active Elections” section.
3. Offices which have been requested by the Town Clerk will be displayed under the “Office Requests” section, with Action status of “Requested,” “Accepted” or “Rejected.”
4. Ballot Ordered records which have been created by the Town Clerk and are pending review by the Registrar will be displayed under the “Ballot Ordered Requests” section. (This will be explained in detail in Section 9.)
5. Questions which have been submitted for state approval by the Town Clerk will be displayed under the “Question Requests” section, with Action status of “Requested,” “Accepted” or “Rejected.”

NOTES:
4. MAINTAIN POLLING PLACE

**Purpose:** To allow the Registrar to add, edit, delete and archive Polling Place(s).

How to Maintain (Add/Edit/Delete/Archive) Polling Places

1. From the Dashboard, select the "Maintenance" tab and click on "Maintain Polling Place" to display the **Maintain Polling Place** screen (Fig. 4-1).

**Figure 4-1 Maintain Polling Place**

2. To add a polling place, click the **"Add Polling Place"** button. The system will display data entry fields in the “Add Polling Place” section (Fig. 4-2).

**Figure 4-2 Maintain Polling Place screen—Add Polling Place**

3. Enter the polling place information. A red asterisk indicates a required field.
4. Click the **"Add Polling Place"** button to save the polling place.
5. The system displays an alert message. Select **OK** to add the polling place and return to the **Maintain Polling Place** screen.
6. To edit a polling place, click the **"Edit"** icon next to the polling place to edit. The system will display data entry fields populated with the current polling place information.
7. Make any desired changes to polling place information and click the "Update" button. The system displays an alert message.
8. To delete a polling place, click the "Delete" icon next to the polling place to be deleted. The system displays an alert message. Select OK to delete the polling place, or select Cancel to go back to the Maintain Polling Place screen.
9. To archive a polling place, select the checkbox next to the polling place to archive and click the "Archive" button. The system displays an alert message. Click OK to archive the polling place.
10. To unarchive a polling place, select the "Un-Archive" button. The system displays an alert message. Click OK to display a pop-up with archived polling places (Fig. 4-3).

**Figure 4-3 Maintain Polling Place – Un-Archive Polling Place**

11. Select the checkbox next to the polling place to un-archive and click the "Un-Archive" button. An alert message will display. Click OK to un-archive the polling place.

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**5. ASSIGN POLLING PLACE TO ELECTION**

**Purpose:** To allow the Registrar to assign polling places to elections.

**How to Assign Polling Places to an Election**

1. From the Dashboard, select the "Maintenance" tab and click on "Assign Polling Place to Election" to display the Assign Polling Place to Election screen (Fig. 5-1).
2. To assign polling places, select the election from the dropdown.
3. Select one or multiple polling places to assign by checking the checkbox(es) next to the polling places to be assigned.
4. To select all polling places use the “Select” checkbox.
5. Click the “Assign Polling Place to Election” button. The system displays an alert message.
6. Select OK to assign polling place(s), or select Cancel to return to the screen without taking any action. If OK is selected, the system adds the polling place(s) and displays the information in a grid below the polling place list (Fig. 5-2).

7. To unassign a polling place, click the “Delete” icon. The system displays an alert message. Select OK to unassign the polling place, or select Cancel to go back to the Assign Polling Place to Election screen without taking any action.
Additional Information:

1. The Registrar can Edit/Delete a polling place if it is NOT assigned to any election.
2. If a polling place is assigned to an election & NO Candidate vote results and stats are entered for that election, then
   a. Registrar can edit the polling place details.
   b. Registrar can delete the polling place by first un-assigning it from the election.
3. If a polling place is assigned to an election and the Candidate Results, Questions Results and Stats are entered and saved by Head Moderator for that election, then
   a. Registrar can edit the polling place name & address only.
   b. Registrar can delete the polling place by first un-assigning it from the election.
   c. Note: The un-assignment of polling place will delete the saved stats.
4. If a polling place is assigned to an election & Candidate Results, Questions Results and the Stats are submitted by HM for that election, then
   a. Registrar CANNOT edit the Polling place details. (See #5 below.)
   b. Registrar CANNOT delete the polling place.
   c. Registrar CANNOT un-assign the polling place.
5. When the Registrar edits a polling place as in #4(a) above, then the system will create a new polling place with the updated information and must keep the old polling place details as-is in order to maintain its previous election history.

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6. MAINTAIN INVENTORY

Purpose: To allow the Registrar to add/maintain inventory for a Town based on the election. Once submitted, the user can generate a Maintain Inventory report from the Reports tab.

How to Maintain Inventory

1. From the Dashboard, select the "Maintenance" tab and click on "Maintain Inventory" to display the Maintain Inventory screen. Until inventory has been added, the system displays "No Data Found" (Fig. 6-1).
2. To display inventory previously entered, select the election and click the "Search" button. The system displays any inventory matching the search criteria.

3. Click the "Add Inventory" button to display the Maintain Inventory data entry screen (Fig. 6-2).

4. Select the Election from the "Election Name" dropdown. Select the Moderator(s), using the type ahead option, and click the "Add" button. The system displays the Moderator and contact number below the search field.

5. Enter the inventory details and click the "Add Inventory" button. An alert message will display.

6. Select OK to add the inventory record and display the Maintain Inventory screen (Fig. 6-3).
7. To view the inventory, click the “View” icon.
8. To edit the inventory, click the “Edit” icon to display the Maintain Inventory screen. The data entry fields will be populated with information for the polling place inventory.
9. After updating the details, click the “Update” button. The system will display an alert message.
10. To delete the inventory, click the “Delete” icon. The system will display an alert message. Select OK to delete the inventory, or select Cancel to go back to the Maintain Inventory screen.

NOTES:

7. MAINTAIN HEAD MODERATOR/MODERATOR/DATA ENTRY USER

Purpose: To allow the Registrar to maintain (add/edit/delete) the roles of Head Moderator, Moderator, and Data Entry as Election Management System Users.

How to Add, Edit and Delete Moderator and Data Entry Roles

1. From the Dashboard, select the “Maintenance” tab and click on “Maintain Moderator/Head Moderator” to display the Maintain Moderator/Head Moderator screen. The system displays “No Moderators Found” until a Moderator has been added (Fig. 7-1).

Figure 7-1 Maintain Moderator/Head Moderator screen

2. To add a moderator, click the “Add Moderator” button.
3. The **Maintain Moderator/Head Moderator** data entry screen will display (Fig. 7-2).

**Figure 7-2 Maintain Moderator/Head Moderator – Data Entry screen**

4. The following roles are available from the “Role” dropdown:
   - Head Moderator
   - Regular Moderator
   - Regular or Absentee Moderator
   - Absentee Moderator
   - Data Entry.

5. Select a role and enter the new user's information. Required information is indicated by a red asterisk.

6. To indicate that a Regular Moderator or Absentee Moderator has Head Moderator permissions, check the “Select as Head Moderator” checkbox (indicated by arrow in Fig. 7-2).

7. Click the “**Add Moderator**” button. The system displays an alert message. Select **OK** to add the moderator and to display the Moderator grid (Fig. 7-3).

**Figure 7-3 Moderator Grid**

8. Username and password are required for Head Moderator and Data Entry, but not for Regular Moderator or Absentee Moderator.

9. If Head Moderator, Absentee Moderator, or Data Entry is selected, the “Polling Place” dropdown is disabled.
10. The Regular Moderators created for one Party-based Election type cannot be used for another Party-based Election type.
11. To edit a Moderator, click the "Edit" icon. The system displays an alert message. Select OK to continue to the data entry screen for that moderator, or select Cancel to close the pop-up without taking any action.
12. After updating the details, click the "Update" button. The system displays an alert message. Click OK to update the moderator's information.
13. To delete a moderator, click the “Delete” icon. The system displays an alert message. Select OK to delete the record or select Cancel to close the message without taking any action.

NOTES:

8. VIEW CANDIDATE(S)

**Purpose:** To allow the Registrar to view candidates. Information from this screen will flow into pre- and post-election reports.

**How to View Candidates**

1. From the Dashboard, select the “Candidates” tab and click on the “View Candidate(s)” menu item to display the View Candidate(s) screen (Fig. 8-1).

**Figure 8-1 View Candidate(s)**

2. To search for a candidate, select an election and enter information in one or more of the following fields: Office, Party, Name on Ballot, First Name, and Last Name. Partial names may be entered.
3. The “Name on Ballot” uses type-ahead search - begin typing the candidate name, and the dropdown will display a list of candidates whose names begin with those letters.
4. Click the “Search” button to display the search results in a grid below the “Search Candidate” section (Fig. 8-2).
9. BALLOT ORDERED

**Purpose:** To allow the Registrar (and Town Clerk) to certify the number of ballots ordered for a polling place/district.

**How to Create and Submit Ballot Ordered**

1. From the Dashboard, select the "Maintenance" tab and click on "Ballot Ordered" to display the **Ballot Ordered** screen. Until a Ballot Ordered record has been created, the system displays "No Data Found" (Fig. 9-1).

2. To create Ballot Ordered for a polling place, click the "Enter Ballot Ordered" button to display the **Ballot Ordered** data entry screen (Fig. 9-2).
3. Select an “Election/Primary Date” and “Polling Place Name” from the respective dropdown.

4. Enter the “Number of Ballots Ordered” and “Percentage of Ballots per Voter Ordered.”

5. Enter Historical Information for the last 4 similar elections. As the “Number of Registered Voters” and “Number Checked as Having Voted” are entered, the system will calculate the “Turnout Percentage.” To add rows, click the icon.

6. Once data is entered, click the “Certify” button. The system displays an alert message. Select OK to save Ballot Ordered details and return to the previous screen, where a summary row will be displayed for the Ballot Ordered record created.

7. To view Ballot Ordered records that have previously been entered for an election, select the election from the dropdown and click the “Search” button. The system displays the Ballot Ordered summary rows for that election.

8. To edit a Ballot Ordered record, click the “Edit” icon next to the record to be edited. The system will display an alert message. Select OK to continue to the Ballot Ordered grid, which will be populated with the Ballot Ordered details.

9. After updating the Ballot Ordered details, click the “Update Certification” button. The system will display an alert message.

10. To delete a Ballot Ordered record, click the “Delete” icon. The system displays an alert message. Select OK to delete the record, or select Cancel to close the pop-up without taking any action.

11. Both the Registrar and the Town Clerk must certify the Ballot Ordered. Either may create the initial Ballot Ordered record for a polling place.

12. If the Town Clerk initially creates and certifies the Ballot Ordered, the system will display a summary row for the Ballot Ordered on the Registrar’s dashboard under “Ballot Ordered Requests” (Fig. 9. 3).
13. To certify the Ballot Ordered and submit to the state, click “View.” Click OK to close the alert message and display a pop-up window with the Ballot Ordered that has been certified by the Town Clerk (Fig. 9-4).

**Figure 9-4 Ballot Ordered – Submit to State**

14. Click the “Submit to State” button. An alert message will display. Click OK to certify and submit the Ballot Ordered to the state.

15. If the Registrar has initially created and certified the Ballot Ordered, the record will display on the Town Clerk dashboard. The Town Clerk will review, certify, and submit to the state.

16. Either the Registrar or the Town Clerk can edit the most recent Ballot Ordered, regardless of the user who initially created it. Any edit will send an updated record to the appropriate dashboard.
17. To print the Ballot Ordered report, select “Ballot Ordered” from the “Reports” screen and click the “Generate Report” button. The system will generate a Ballot Ordered report.

18. The Registrar of Voters must have assigned at least one polling place to the primary/election before a Ballot Ordered can be created for that election.

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10. HEAD MODERATOR’S RETURN TEMPLATE

Purpose: To allow the Registrar of Voters or Town Clerk to generate a Head Moderator’s Template. This form is a paper copy of the Head Moderator’s Return. Names of candidates will be in the same order as the tapes for easy data entry.

How to Generate the Head Moderator’s Template

1. From the Dashboard, select the “Reports” tab and click on “Head Moderator’s Return Format” to display the Head Moderator’s Return Format screen (Fig. 10-1).

Figure 10-1 Head Moderator’s Return Format screen

2. Select the election and click the “Generate Report” button to generate the blank Head Moderator Return template with all the Candidates and Offices listed for the selected election in PDF format (Fig.10-2).
3. The report can be printed from a configured printer.
4. The votes will be manually entered by the Polling Place Moderator and duly signed.

NOTES:__________________________________________________________________________________________
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11. HEAD MODERATOR’S RETURN

**Purpose:** To allow the Registrar to view the Head Moderator’s return.

**How to View the Head Moderator’s Return**

1. From the Dashboard, select the “Head Moderator’s Return” tab to display the **Head Moderator’s Return** screen (Fig. 11-1).

**Figure 11-1 Head Moderator’s Return screen**

2. If returns have previously been entered, a summary row for each return will be displayed. To filter returns by election, select an election from the dropdown and click
the "Search" button to display the results for the selected election that have been submitted by Head Moderator. Each original and amended return that has been submitted for the selected election will be displayed and available to View (Fig. 11-2).

**Figure 11-2 Returns for a Selected Election**

3. To view the results, click on the "View" link in the "Actions" section to display a pop-up window that shows the results submitted by the Head Moderator (Fig. 11-3).

4. Click the "Close" button to close the pop-up window.

**Figure 11-3 Head Moderator's Return Results**
12. VIEW STATS

**Purpose:** To allow the Registrar to view and print the stats submitted by Head Moderator.

How to View and Print Municipal Stats submitted by Head Moderator

1. From the Dashboard, select the "View Stats" tab from Menu Bar to display the View Stats screen (Fig. 12-1).

![View Stats](image)

![Figure 12-1 View Stats](image)

2. Select the election and click the “Search” button to display the results submitted by the Head Moderator for the selected election.

3. Click the "View" link in the "Actions" section to display a pop-up window that shows the stats submitted by the Head Moderator (Fig. 12-2).

![Figure 12-2 Stats](image)

4. The stats may be printed from this screen by right clicking and selecting "Print." Use the scroll bars to view all stats.
13. VIEW QUESTIONS RESULTS

**Purpose:** To allow the Registrar to view the Questions Results submitted by the Head Moderator.

**How to View Questions Results**

1. From the Dashboard, select the “View Question Results” tab to display View Questions Results screen (Fig. 13-1).

**Figure 13-1 View Questions Results screen**

2. Select the election and click the “Search” button to display the Questions Results submitted by Head Moderator in the grid below the “Search Election” section.

3. Click the “View” link in the “Actions” section to display a pop-up window that shows the Question Results submitted by Head Moderator (Fig. 13-2).

4. Click the “Close” button to close the pop-up.

5. Click on “Generate Report” to display a report in PDF format that shows the Questions Results information. The “Generate Report” link will not be available until the Head Moderator has submitted results.
Figure-13-2 Question Results

**View Questions Results**

**Election: 12/30/2015 - Glastonbury State Election**

<table>
<thead>
<tr>
<th>DISTRICT 1- DISTRICT 3 - Smith Middle School</th>
<th>Polling Place</th>
<th>Absentee Ballots</th>
<th>Election Day Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tabulator Write-In Hand Total</td>
<td>Tabulator Write-In Hand Total</td>
<td>Tabulator Write-In Hand Total</td>
<td>Grand TOTAL</td>
</tr>
<tr>
<td>DISTRICT 2-District 2 - Helbron Avenue School</td>
<td>1305 0 0</td>
<td>1365 26 0 0</td>
<td>26 0 0 0</td>
</tr>
<tr>
<td>DISTRICT 3-District 3 - Helbron Avenue School</td>
<td>1407 0 0</td>
<td>1467 79 0 0</td>
<td>79 0 0 0</td>
</tr>
<tr>
<td>DISTRICT 4-District 4 - Glickon Wellness School</td>
<td>Yes</td>
<td>10 0 0</td>
<td>10 0 0</td>
</tr>
<tr>
<td>DISTRICT 5-District 5 - Nayaug Elementary School</td>
<td>No</td>
<td>5 0 0</td>
<td>5 0 0</td>
</tr>
<tr>
<td>DISTRICT 7-District 7 - Academy Building</td>
<td>Total</td>
<td>2787 0 0</td>
<td>2787 101 0 0</td>
</tr>
</tbody>
</table>

NOTES:__________________________________________________________________________________________
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Shall the Constitution of the State be amended to remove restrictions concerning absentee ballots and to permit a to vote with appearing at a polling place on the day of an election?

Shall the revenue be collected every year?
14. REPORTS

**Purpose:** To allow the Registrar to generate reports based on the selection of election and office. All the reports can be generated in PDF and Excel format and downloaded to another device or printed from a configured printer.

**How to Generate Reports**

1. From the Dashboard, select the “Reports” tab to display the Reports screen (Fig. 14-1).

**Figure 14-1**

Below is the list of reports:

- Notification of Number of Electors and Number of Polling Places
- List of Offices to be Filled
- List of Nominees
- Question Report
- Grids Report
- Affidavit of Absentee Ballot
- Ballot Ordered
- Polling Places Report
- Moderator/Head Moderator’s List
- Election Day Registration, Turnout and Absentee Ballot Statistics
- EDR Ballots Report
- Overseas Ballots Report
- Military Ballot Report
- Presidential Ballot Report
- Provisional Ballot Report
- Winners Notification Report
- Certificate
- Total Votes Cast by Office / Candidate
- Inventory Report
- Election Results by Voting District
2. In order to generate the reports related to results, the Head Moderator’s Return, Stats and Question Results must have been approved/accepted.

3. In order to generate the reports related to the winners, the winners must have been announced.

4. Select the report by clicking the radio button beside the desired report. If the report selected is specific to election or office, dropdowns will be enabled to select the election and/or offices.

5. Click the “Generate Report” button to generate the report.

6. Reports can be generated only for the statistics/results for the town in which the Registrar is logged in.

How to Generate a Statement of Vote

1. To generate a Statement of Vote, select the “Reports” tab from the Dashboard and click on “Statement of Vote.” The Statement of Vote screen will display (Fig. 14-2).

![Figure 14-2 Statement of Vote screen](image)

2. Select the Election, Office(s), and File Type from the respective dropdowns and click the “Generate Report” button.

3. The system will generate the Statement of Vote for the selected election and office(s).

How to Generate a Head Moderator’s Return Format

1. To generate a Head Moderator’s Return Format, which can be printed and used for manual data entry at polling places, select the “Reports” tab from the Dashboard and click on “Head Moderator’s Return Format.” The Head Moderator’s Return Format screen will display (Fig. 14-3).

![Figure 14-3 Head Moderator’s Return Format screen](image)

2. Select the Election from the dropdown and click the “Generate Report” button.
3. A user may generate the blank Head Moderator Return with all the Candidates & Offices listed for an Election in a PDF; the user will print the form and votes will be manually entered (Fig. 14-4).

**Figure 14-4 Head Moderator Return Format – sample output**

![Head Moderator Return Format](image)

**How to Generate a Moderator’s Return form**

1. To generate a Moderator’s Return, select the “Reports” tab from the Dashboard and click on “Moderator’s Return.” The **Moderator’s Return** will display as a fillable PDF (Fig. 14-5).

2. Enter the information to prepare the form for printing. The form can be printed and distributed for use in polling places. This is a stand-alone form; that is, when information is entered in the fields on this form, the information does NOT populate any fields in the Election Management System.