

Modern Polling - Election Manager Training

Course duration: 1hr

Welcome to the Modern Polling

In this interactive course, we guide you through each step to deliver an election with the Modern Polling Platform. This includes tips on how to:

- **Validate Data and Create your Election**
- **Proof your Poll Cards and Ballot Papers**
- **Manage your Polling Station Staff, their Training and iPad Distribution**
- **Final Data Upload (minus 5 data)**
- **Monitor and Support your Polling Stations on Election Day**

Course Overview

What's new?

- Easier Election Creation
 - Improved Layout
 - More Responsive Across Devices
 - Reports - How to Generate Additional Reports
 - Reports - Download Count
 - Reports - File History
 - Reports - Sorting
 - Reports - Export All
 - Reports - Create Sealed Audit after Export All
 - Welsh Translation (beta)
 - Dark Mode (beta)
-

Overview

- Introduction
 - How to Log into the Modern Polling Portal
-

QR Code - Proofing Poll Cards and Ballot Papers

- QR Code Proofing
 - Pass/Fail Report
 - Proof Your Own QR Codes
-

Data Validation

- Data Validation (check your data in Modern Polling)
 - What files are required for Data Validation?
 - When are the files required?
 - Data Prep & Upload Instruction Video
 - Checking your Data in the Election Data tab
-

Initial (1st) Live Data Upload at Minus 19

- Initial (1st) Live Data Upload

Polling Station Staff Training

- Online Training
 - Online Training - Options
 - Online Training - Overview
 - Refresher Training - Live Webinars
 - Hands-On Training - Training Package is Recommended
-

Final (2nd) Data Upload at Minus 5

- Final Data Upload at Minus 5 - How to Overwrite Registers
-

Using the Modern Polling Portal - after Minus 5

- Overview
- Viewing your Polling Station Staff
- Assigning Staff (manually) Staff Manually
- Moving Staff (manually) from one Station to Another
- Viewing Polling Station Details
- Polling Station Details - Overview Tab
- Polling Station Details - Overview Tab > Devices

- Polling Station Details - Overview Tab > Signal Strength
 - Polling Station Details - BPA Tab
 - Adding an Emergency Proxy
 - Adding a Clerical Error
 - Change Voter to Postal Voter
-

iPad Delivery/Distribution to Presiding Officers

- Overview
 - iPad Delivery
 - iPad Distribution to Presiding Officers
 - Hardware Checks
 - Polling Station Requirements
-

Election Day - Dashboards

- Election Morning - Checks
- Election Day - Checks
- Election Day - Turnout
- Election Close of Poll - Checks
- Close of Poll - Election Reports

- Close of Poll - Downloading Reports

Election - Support

- Support (Election Lead-Up & Election Day)
- Voter's that were manually recorded on paper

Post Election (Reports, Feedback & iPad Collection)

- VIDEF (Voter Identification Evaluation Form)
- How to Generate Additional Reports
- Checking Generated Reports
- Sealed Reports
- Downloading Reports
- When do Reports Expire on Modern Polling?
- We appreciate your Feedback!
- iPad Collection

Key Dates

- Election: May 1st - Add me to your Calendar

Over to you (practice for Election Day) - please COMPLETE by 14th March

- Overview of the Modern Polling App - Training Election
- Overview of the Modern

What's new?

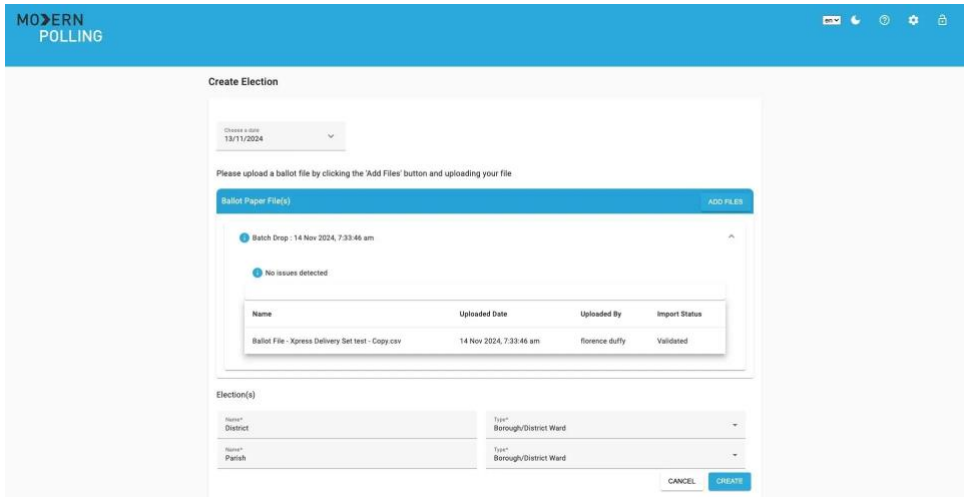
Easier Election Creation

Previously, when creating an election you had to have your ballot file open to name your election. You no longer need to do this, the portal cleverly extracts the name from the ballot for you once the ballot file is uploaded.

Once you have entered your election date, click '**ADD FILES**' to locate your ballot file(s).

The screenshot shows a web form titled "Create Election". At the top left, there is a date selection dropdown menu with the text "Choose a date" and the selected date "13/11/2024". Below this, a message reads: "Please upload a ballot file by clicking the 'Add Files' button and uploading your file". Underneath the message is a blue file upload area with the text "Ballot Paper File(s)" on the left and an "ADD FILES" button on the right. Below the upload area, a message states: "No files uploaded, click 'ADD FILES' to begin". At the bottom right of the form, there are two buttons: "CANCEL" and "CREATE".

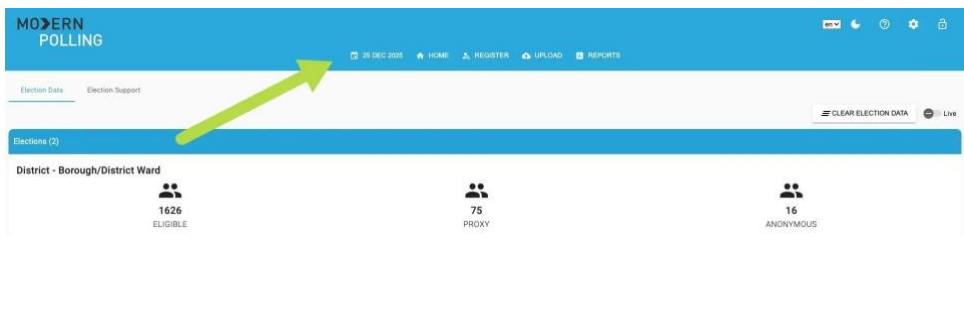
Once the ballot is added and validated, the Election names are extracted (e.g. District and Parish). You simply map them to their election types (e.g. Borough/District Ward and Parish) and click **CREATE**. Your ballot data is imported and your election created.



The steps to upload your remaining files has not changed.

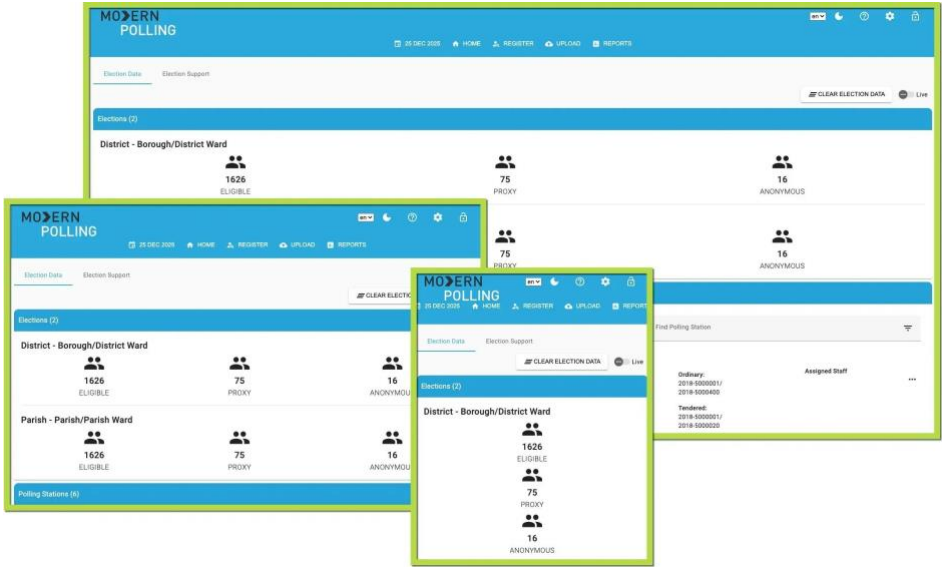
Improved Layout

The navigation menu has moved from the left to the top of the portal (beneath the header) to make maximum use of space.



More Responsive Across Devices

The portal has been designed to work well on a variety of screen sizes to provide a consistent user experience across devices, for example desktop, laptop, iPad and phone.



Reports - How to Generate Additional Reports

We generate the BPA and VIDEF, the most important reports, immediately at close of each station.

The screenshot shows the 'Reports' page in the MODERN POLLING application. It features a 'Generate Reports' button and a search bar. Below the search bar, there are two sections: 'Station Reports' and 'Amalgamated Reports'. The 'Station Reports' section contains a table with the following data:

Station Number	File Name	Created	Election Name	Size	Download	CSV History	PDF History
1	BPA Report	Jan 9, 2025, 5:23:17 PM	District	PDF: 22.86 KB			
1	BPA Report	Jan 9, 2025, 5:23:17 PM	Parish	PDF: 22.55 KB			
1	Voter Identification Evaluation Form	Jan 9, 2025, 5:23:16 PM	District	PDF: 23.04 KB			
1	Voter Identification Evaluation Form	Jan 9, 2025, 5:23:17 PM	Parish	PDF: 23.04 KB			

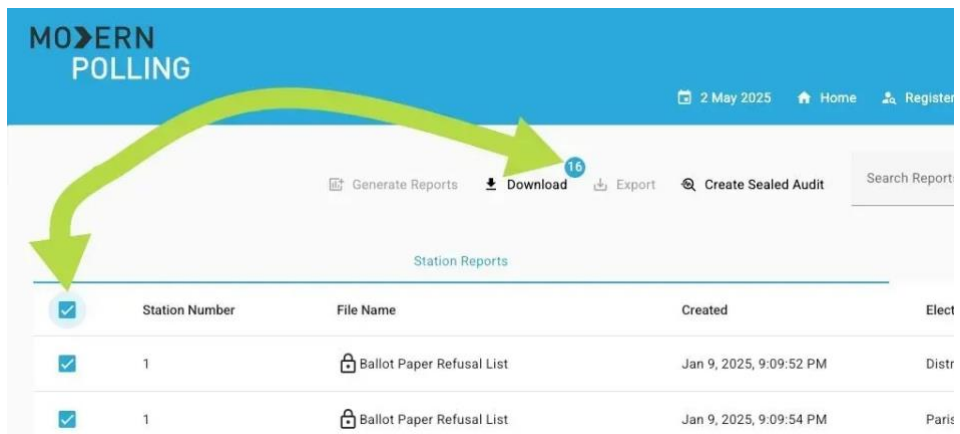
There are additional reports per station, per election, (which includes your CNL, BPRL, Voter Stats etc..) these take time to generate, and can be done post election when required.

The 'Generate Reports' button will be enabled when all polling stations close. Once pressed it will grey out, allow some time and refresh the browser to allow reports to filter through.

Reports - Download Count

Report downloads have been enhanced to show a count of the reports you have selected to download. The count is displayed to the right of the 'Download' button.

The screenshot below shows 16 reports selected for download. Click 'Download' to download all 16.



Reports - File History

There are 2 new columns in Reports:

- CSV History
- PDF History

Station Number	File Name	Created	Election Name	Size	Download	CSV History	PDF History
1	Voter ID Statistics	Jan 9, 2025, 8:23:29 PM	District	PDF: 19.48 KB			
1	Voter ID Statistics	Jan 9, 2025, 8:23:28 PM	Parish	PDF: 19.49 KB			
1	Voter ID Statistics	Jan 9, 2025, 8:23:28 PM	Parish	CSV: 403 Bytes			
1	Voter Identification Evaluation Form	Jan 9, 2025, 5:23:16 PM	District	PDF: 23.04 KB			
1	Voter Identification Evaluation Form	Jan 9, 2025, 5:23:17 PM	Parish	PDF: 23.04 KB			
1	Marked Register	Jan 9, 2025, 8:23:28 PM	District	CSV: 29.65 KB PDF: 85.71 KB			
1	Marked Register	Jan 9, 2025, 8:23:28 PM	Parish	CSV: 29.65 KB PDF: 85.71 KB			
1	Marked Proxy Register	Jan 9, 2025, 8:23:28 PM	District	CSV: 2.63 KB PDF: 21.76 KB			
1	Marked Proxy Register	Jan 9, 2025, 8:23:28 PM	Parish	CSV: 2.63 KB PDF: 21.76 KB			

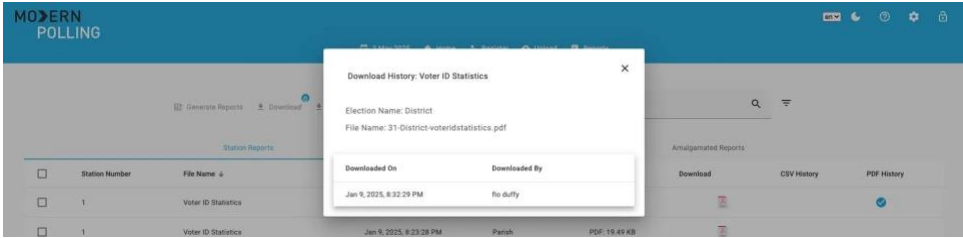
When a file is downloaded, a 'tick' icon is displayed in the corresponding column. For example, if the 'Voter ID Statistics' PDF file is downloaded.

Station Number	File Name	Created	Election Name	Size	Download	CSV History	PDF History
1	Voter ID Statistics	Jan 9, 2025, 8:23:29 PM	District	PDF: 19.48 KB			
1	Voter ID Statistics	Jan 9, 2025, 8:23:28 PM	Parish	PDF: 19.49 KB			

To view the download history for the file, click on the 'tick' icon, a dialog is displayed with the file details:

- File Name downloaded
- Downloaded On
- Downloaded By

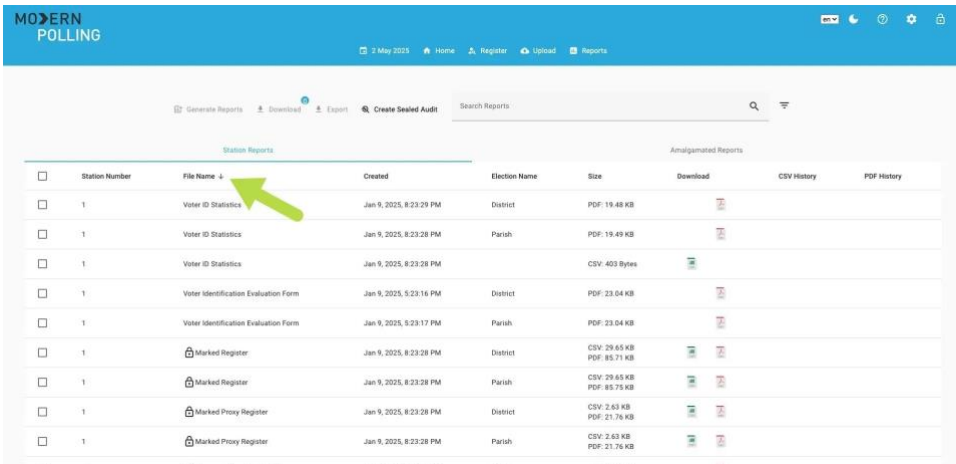
To close the dialog, click on the X in the top right.



Reports - Sorting

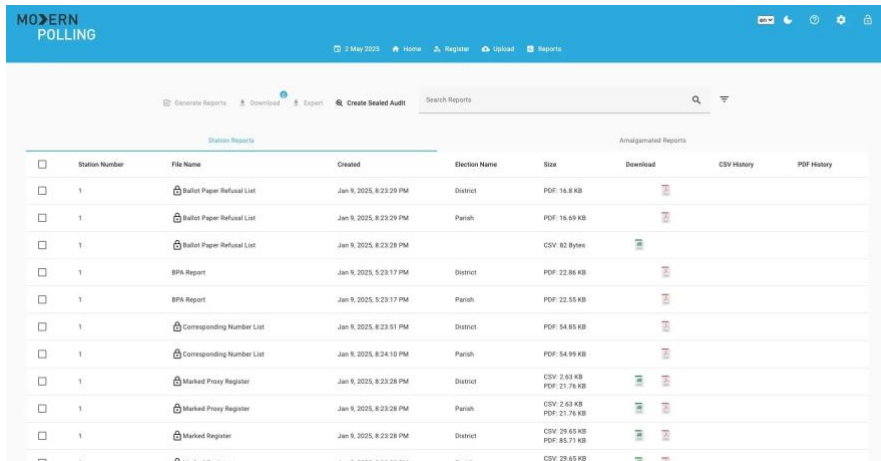
Reports can be sorted by toggling the arrows in the table header. The columns that can be sorted are:

- ◆ Station Number
- ◆ File Name
- ◆ Created
- ◆ Election Name
- ◆ CSV History
- ◆ PDF History

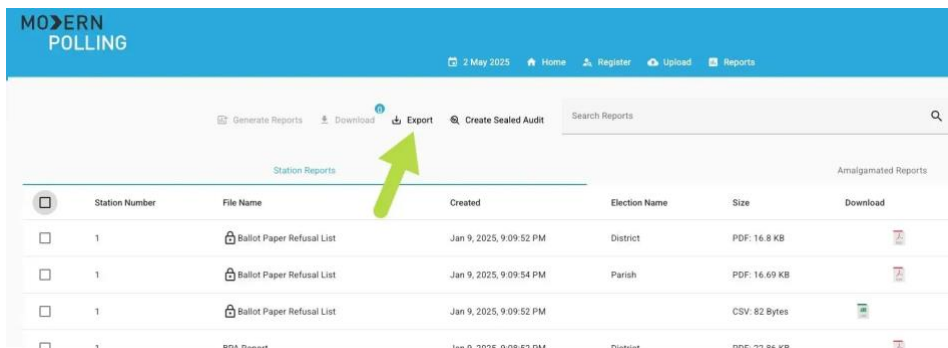


Reports - Export All

We recommend exporting files 35 working days post Close of Poll. Your Project Lead will be in contact with you to complete this, if you want to do sooner, please contact your Project Lead.



- Once the 'Export' button is enabled, click on it.



- All of your election reports are ready to export once the '**Export All Election Reports (ZIP)**' link is displayed in the banner beneath the Header.
- The 'Export' button is disabled.

↓ [Export All Election Reports \(ZIP\)](#)

Generate Reports Download Export

Station Reports

<input type="checkbox"/>	Station Number	File Name
<input type="checkbox"/>	1	🔒 Ballot Paper Refusal List
<input type="checkbox"/>		🔒

- To export all of your election reports, click **'Export All Election Reports (ZIP)'** link.
- A message is displayed stating "You are about to export all of your reports to your device. Once you have completed this action your project manager will contact you about deletion of data from Modern Democracy systems. Please remember to Create the Sealed Audit, and save it with the Export Zip."
- Select the checkbox 'I understand I am exporting all my reports and Modern Democracy will not be able to provide duplicates.'
- The 'EXPORT ALL' button is enabled, click to export all.
- Whoever completes the export is recorded, details of which can be found in the Sealed Audit Report.

↓ [Export All Election Reports \(ZIP\)](#)

You are about to export all of your reports to your device. Once you have completed this action your project manager will contact you about deletion of data from Modern Democracy systems. Please remember to Create the Sealed Audit, and save it with the Export Zip.

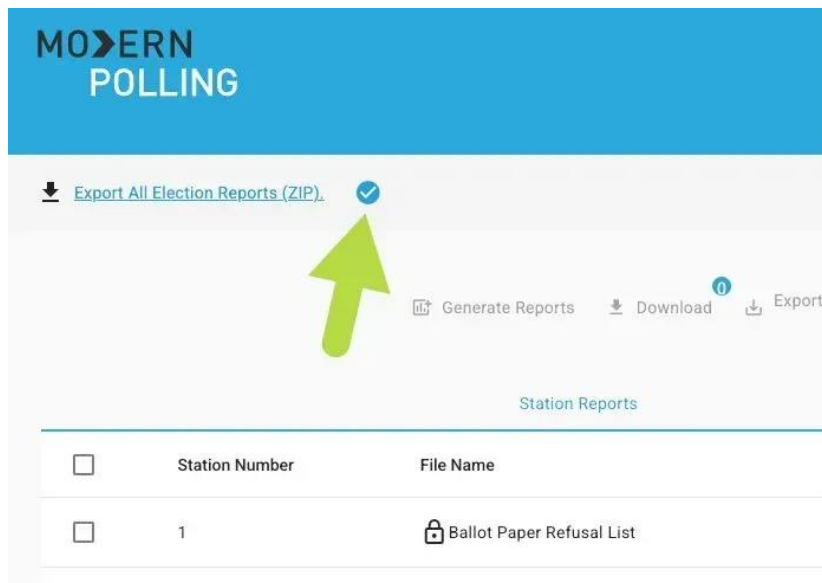
I understand I am exporting all my reports and Modern Democracy will not be able to provide duplicates.

EXPORT ALL Cancel

Note: When Exporting All reports, they are downloaded to your downloads folder as a zipped (compressed) file. To extract the zipped file into individual reports, you will need WinRAR or 7-Zip.

Please check all of your exported reports.

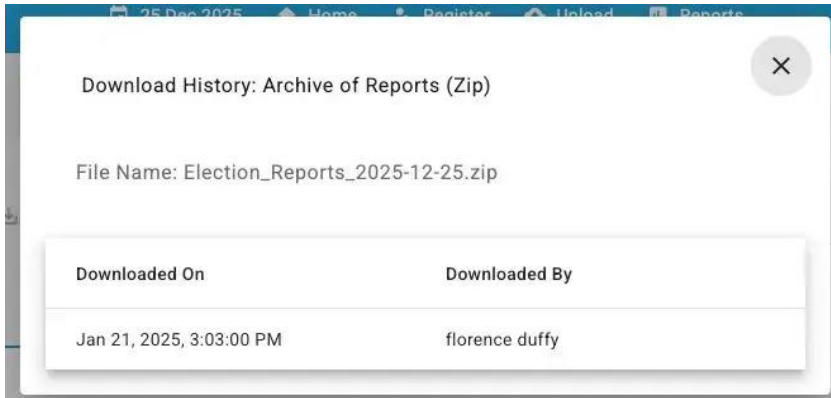
Once the 'Export All Election Reports (ZIP)' is exported/downloaded, a 'tick' icon is displayed to the right of the link.



The file history details are displayed, which include:

- File Name downloaded
- Downloaded On
- Downloaded By

To close the dialog, click on the X in the top right.



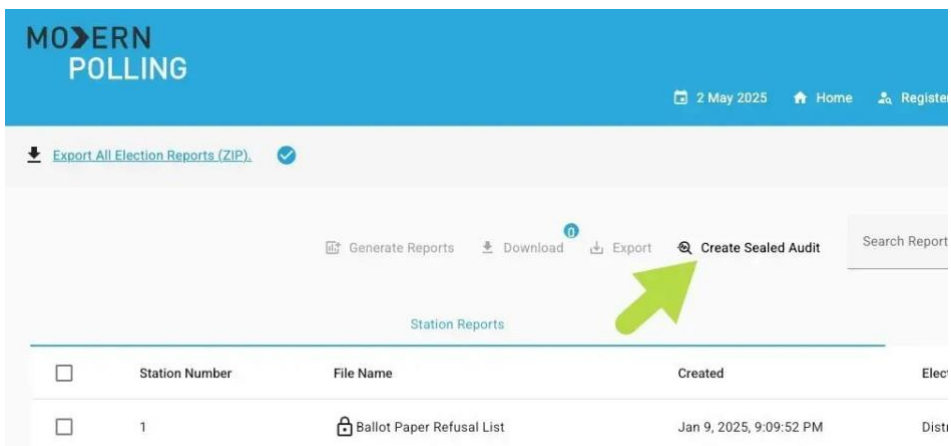
Reports - Create Sealed Audit after Export All

If a file has been downloaded, a blue tick will be displayed in the file history column, to view who has downloaded a specific sealed report (e.g. Marked Register), click on the 'tick' icon under the file history.

Tip! to find a specific report type (e.g. Marked Register), enter 'Marked Register' in 'Search Reports' to filter the list to only display marked registers.

We recommend doing a 'Sealed Audit Report' once you have exported all of your files. Click 'Create Sealed Audit' for all those files (as seen in previous section).

- To create a sealed audit report, click on the '**Create Sealed Audit**'.



- Click 'Download Sealed Audit Report (PDF)'.
It will be downloaded as a PDF to your downloads folder.
Ensure you navigate to the file and check it.

The screenshot shows the Modern Polling dashboard. At the top, there is a blue header with the logo and the date '25 Dec 2025'. Below the header, there are two main buttons: 'Export All Election Reports (ZIP)' and 'Download Sealed Audit Report (PDF)'. A green arrow points to the 'Download Sealed Audit Report (PDF)' button. Below these buttons, there is a navigation bar with 'Generate Reports', 'Download', 'Export', and 'Create Sealed Audit'. The main content area is titled 'Station Reports' and contains a table with the following data:

<input type="checkbox"/>	Station Number	File Name	Created
<input type="checkbox"/>	1	🔒 Ballot Paper Refusal List	Jan 15, 2025, 4:34:20 PM
<input type="checkbox"/>	1	🔒 Ballot Paper Refusal List	Jan 15, 2025, 4:34:21 PM

Welsh Translation (beta)

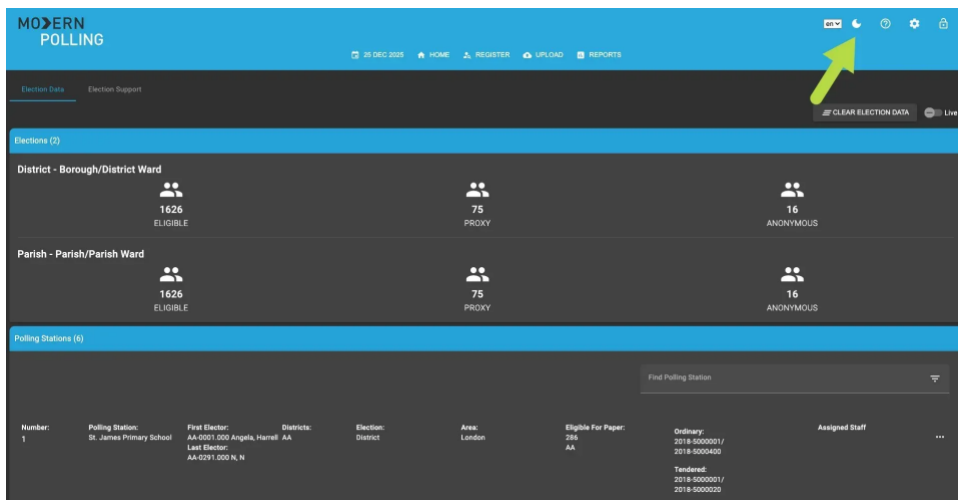
We are now pleased to offer our Welsh clients the ability to use our portal in the Welsh language. The new portal has the option to switch from English to Welsh at any time.

The screenshot shows the Modern Polling dashboard in Welsh. At the top, there is a blue header with the logo and the date '25 DEC 2025'. Below the header, there are two main buttons: 'Export All Election Reports (ZIP)' and 'Download Sealed Audit Report (PDF)'. A green arrow points to the 'Download Sealed Audit Report (PDF)' button. Below these buttons, there is a navigation bar with 'Generate Reports', 'Download', 'Export', and 'Create Sealed Audit'. The main content area is titled 'Station Reports' and contains a table with the following data:

<input type="checkbox"/>	Station Number	File Name	Created
<input type="checkbox"/>	1	🔒 Ballot Paper Refusal List	Jan 15, 2025, 4:34:20 PM
<input type="checkbox"/>	1	🔒 Ballot Paper Refusal List	Jan 15, 2025, 4:34:21 PM

Dark Mode (beta)

The new portal has the option to switch the User Interface to dark mode, which is ideal for reducing eye strain in low-light conditions and conserving battery power.



Overview

Introduction

Your secure Election Manager Portal is your council's hub to manage your election on Modern Polling. Here you will:

- **Validate your Data**, before your live upload
- Create your **Live election**, upload election data and **minus 5 data**
- See your **Election Day Dashboards**; monitoring **Voter Turnout, Polling Station Status** and **Device (iPad) Status**
- Access your **Close of Poll Reports: Single Polling Station** and **Amalgamated Polling Station Reports** (i.e, Ballot Paper Account(s), Corresponding Number List(s) etc.)

How to Log into the Modern Polling Portal

- Click on the portal link provided in your Customer Implementation Plan (CIP), the link is also available by clicking on your upcoming election in your '**Active Elections**' tab on the **Support / Knowledge Hub**.
Note: we recommend using the google 'Chrome' web browser.
- Type in your **Mobile Number**
- Click on **SUBMIT**
- On the next screen, enter the **6-digit passcode** (check your mobile text messages)
- Click on **SIGN IN**

Sign In
Enter your mobile number to receive a 6 digit passcode to your registered mobile phone.

Enter your mobile number*
+44 7XXXXXXXXXX

SUBMIT

Complete Sign-In
A 6 digit passcode has been sent to 77XXXXXXXXXX

□ □ □ □ □ □

CANCEL RESEND PASSCODE SIGN IN

QR Code - Proofing Poll Cards and Ballot Papers

QR Code Proofing

Modern Polling uses **QR codes** printed on **both** your **Poll Cards** and **Ballot Papers** which enables the use of the ‘**scan**’ functionality when searching for voters on the Modern Polling App.



1. Printer

You will need to advise your printer that you are using Modern Polling in your upcoming election, so that they can incorporate QR codes onto your poll cards and ballot papers. We recommend doing this e.g. 6 months prior to the May Election.

Our project leads have built good relationships with various print suppliers including Civica, PrintUK, Print Image, Sciprint & MPS.



2. Printer Specification

Send your printer our Modern Democracy [Printer Specification](#) document, which will instruct them on how to create and format the QR codes.

If your printer has any questions/queries, please notify us by raising a case, with the appropriate printer contact details, and your designated project lead will engage directly with them.

The [Printer Specification](#) document provides guidelines on size, location and format of the QR Codes for both the Poll Cards and Ballot Papers per EMS.

POLL CARD - QR CODE FORMATS

XPRESS

PD Code-ENO

- For example:
If an elector has the elector number **AA-1** then the QR code must be constructed as AA-1 (**AA is the PDCode** and **1 is the ENO**).

IDOX EROS

PD Code-ENO

- For example:
If an elector has the elector number **AA-1**, then the QR code must be constructed as AA-1 (**AA is the PDCode** and **1 is the ENO**).

DEMOCRACY COUNTS

PDCode-RollNo

- ◆ For example:
If an elector has the elector number **AA-0001/125** then the QR code must be constructed as **AA-0001.125** (**AA is the PDCode** and **0001.125** is the ENO).

BALLOT PAPER - QR CODE FORMATS

XPRESS

UIM+BPPrefix,OrdinaryStart – UIM+BPPrefix,OrdinaryEnd

***BPPrefix** included in the above, if not it will be:

UIM,OrdinaryStart - UIM,OrdinaryEnd

Note: if the number of digits in **OrdinaryStart** does not match the number of digits in **Colour 1 B.P.Finish No**, zeros will be added.For example:

- If *Colour 1 B.P.Start No.* is *1*
and *Colour 1 B.P.Finish No.* is *0000400*
Colour 1 B.P.Start No. will have zeros added to and instead of being *1* it will be *0000001*

IDOX EROS

Colour 1 B.P.UIM.Prefix,Colour 1 B.P.Start No. - Colour 1 B.P.UIM.Prefix,Colour 1 B.P.Finish No.

Note: if the number of digits in **Colour 1 B.P.Start No** does not match the number of digits in **Colour 1 B.P.Finish No**, zeros will be added.

For example:

- If *Colour 1 B.P.Start No.* is *1*
and *Colour 1 B.P.Finish No.* is *0000400*
Colour 1 B.P.Start No. will have zeros added to and instead of being *1* it will be *0000001*

DEMOCRACY COUNTS

UIMPrefix+ElectoralAreaID,Colour1BPStartNo –
UIMPrefix+ElectoralAreaID,Colour1BPEndNo

Note: if the number of digits in *Colour1BPStartNo* does not match the number of digits in *Colour1BPEndNo*, zeros will be added.

For example:

- If *Colour1BPStartNo* is *1*
and *Colour1BPEndNo* is *0000400*
Colour1BPStartNo will have zeros added to and instead of being *1* it will be *0000001*



3. Proofs to be Checked

When you receive an electronic copy of your poll card proofs from your printer, please upload these to Modern Democracy for checking and to get signed off before anything goes to print.

Our secure [digital uploads portal](#) ensures that documents are destroyed & no longer accessible by us, after 24 hours.

- When you receive an electronic copy of your poll card/ballot paper proofs from your printer, upload these to Modern Democracy for checking:

<https://uploads.moderndemocracy.com>

Username: **MDuploadsAdmin**

Password: **Upl04dM3Md920!**

Note: when proofing poll cards, it is advisable to include proxies.

- **Your Project Lead will spot-check and randomly select 20 poll cards** and provide you with a pass/fail report to advise your printer. We recommend completing additional checks to cover all contests for each election.

Pass/Fail Report



20 random Poll Cards will be proofed by the Project Lead.

For each contest to be proofed - please speak with your project lead about additional services.

Your designated project lead will provide you with a **pass/fail report** so that you can further advise your printer. If proofs do not pass checks, we will advise you on what your printer must do to easily rectify these.

In addition to the standard checking we do, we highly recommend that **you** complete additional proofing checks, to cover all contests for each election. You can do so by following our step-by-step instructions by watching our quick video **next**.

Proof Your Own QR Codes

Click to watch the video:
<https://youtu.be/69E6-JjL814>

Data Validation

Data Validation (check your data in Modern Polling)

Data Validation

We ask that you practice and familiarise yourself with exporting the required data files from your EMS (**test data files**) using our step-by-step instructions.

Please create an election on your Modern Polling portal (using a random date) and upload these test data files.

This helps to pre-empt issues/errors which can be ironed out **before** you create your **live election**.

What files are required for Data Validation?



1. **Ballot Paper**
 2. **Polling Station Registers**
 3. **Absent Voter List**
 4. **Staff Allocation**
-

When are the files required?

Upload can be done from now after this Election Manager (EM) training is complete.

Please allow some time after data validation to ensure the stats are correct and the election manager portal display is correct.

When data validation has been completed and signed off, we will then delete the election and be ready for the live upload after close of nominations.

Data Prep & Upload Instruction Video

The video below outlines the instructions on how to prepare your data files & how to upload them to the Modern Polling Portal.

Click to watch the video:
<https://youtu.be/Nhh7F5GnNhA>

Checking your Data in the Election Data tab

When you open your election the **Overview** screen is displayed. There are two tabs, **Election Data** (to check your election data) and **Election Support** (to check your Election on Election Day - progress of the election and status of polling stations).

The **Election Data** tab is selected by default.

The screenshot shows the 'MODERN POLLING' interface. At the top, there is a navigation bar with the date '25 DEC 2025' and links for 'HOME', 'REGISTER', 'UPLOAD', and 'REPORTS'. Below this, there are tabs for 'Election Data' (selected) and 'Election Support'. A 'CLEAR ELECTION DATA' button and a 'Live' indicator are also present.

The main content area is divided into three sections:

- Elections (2)**: This section displays data for two levels: 'District - Borough/District Ward' and 'Parish - Parish/Parish Ward'. For each level, there are three categories: 'ELIGIBLE' (1554), 'PROXY' (42), and 'ANONYMOUS' (24).
- Polling Stations (1)**: This section contains a table with one row of data for a polling station. The table has columns for Number, Polling Station, First/Last Elector, Districts, Election, Area, Eligible For Paper, Ordinary/Tendered dates, and Assigned Staff.

Number:	Polling Station:	First Elector:	Districts:	Election:	Area:	Eligible For Paper:	Ordinary:	Assigned Staff	...
1	St. James Primary School	AA-1 Angela B. Hamill Last Elector: AA-279 N N	AA	District	London	258 AA	2018-02-05/2018-02-05 Tendered: 2018-02-05/2018-02-05		

The **Election(s)** panel shows the Election data:

- Election Contest and Type
- Total Electors (Eligible)
- Proxy
- Anonymous

The **Polling Stations'** panel shows all your polling stations and the detail for each:

- Number (Polling Station Number)
- Polling Station (Polling Station Name)
- First Elector (their Name and Number on the Register)
- Last Elector (their Name and Number on the Register)
- Districts
- Area
- Eligible for Paper
- Ballot UIMs and Ranges (Ordinary and Tendered)
- Assigned Staff and their role
- Actions - (click the Edit icon to Add/Edit or Move Staff between Polling Stations)

Note: you can click on the Polling Station to view further details.

Initial (1st) Live Data Upload at Minus 19

Initial (1st) Live Data Upload

Following the **same process** as before when you created a test election, please create your **live election** and upload your **actual/live data files**, as soon as you know which elections and areas will be contested, which may be **on or close to the deadline for withdrawals of nomination (-19)**.



Export: Data Files from EMS

We work with all EMS'. Please export **3** file types (at this stage) following our easy step-by-step instructions: **Ballot Paper, Polling Station Registers & Absent Voter List**.



Create: Live Election

Log into your Modern Polling portal and create your live election.



Upload: Live Data Files

Please upload the **3 file types** you exported from your EMS.

Validate the data on the election overview and confirm it is accurate. This includes voter information (eligible electors, number of proxies and anonymous), ballot paper information (ranges and UIM's) and poll station information.

Note: You will only upload the ballot paper file once, which is at this stage. This is the same file you have provided your printer with and is the data we use to check your ballot paper proofs. **No information in the ballot file can be changed after the file has been uploaded, it is important that data is correct. If there are errors, depending on the type of error you will need to either delete the election and start again or fix the ballot file(s) in your EMS, export and re-upload again.**

We understand that this may cause a change in processes as this file can be changed up to and including election day when using a manual process. However Modern polling cannot support changes to the ballot file after this upload. This includes changing ballot ranges, UIM or ballot numbers.

Do not upload a staff file at this point. This will be done at minus 5.

Polling Station Staff Training

Online Training

Sufficient training will enable your staff to use Modern Polling in the Polling Station, on election day.

As Election Managers, it is your responsibility to ensure that your staff are comfortable using Modern Polling.

We provide **online** training for your polling station staff - **Poll Clerks & Presiding Officers**.

Our courses will enable your staff to use Modern Polling in the Poll Station, on election day.



Project Lead

1. Your project lead will provide you with **2** training course links - one for your **Poll Clerks** and one for your **Presiding Officers**.



Election Manager

2. You as the Election Manager, will provide your staff with their online training course links.



Staff

3. It is the responsibility of each member of staff to complete their Modern Polling training course.

Online Training - Options

Included as Standard - non assessed

Non-assessed online training.

Users will have access to our comprehensive, interactive training resource library.

Additional Service Training - assessed

Assessment based online training, this is additional service and worth considering because of the advantages, which are:

- 1. Gradebook** – we provide a link to a gradebook where you can see a breakdown of:
 - Who has completed the course
 - Performance and grades
- 2. Confidence on Election Day** you know that your Staff are knowledgeable on how to use modern polling which in turn means:
 - Less support required from you on election day

Your designated project lead will discuss training options with you during your Implementation Meeting.

Online Training - Overview



Poll Clerk

- Getting Started
- Voter Arrives with Poll Card
- Voter Arrives without a Poll Card
- Additional Scenarios

Presiding Officer

- Getting Started
- Voter Arrives with Poll Card
- Voter Arrives without a Poll Card
- Additional Scenarios
- Collecting iPad and Performing Checks
- Submitting the Ballot Paper Account
- Troubleshooting

Refresher Training - Live Webinars



For the bigger elections (e.g. May), we hold **2** live 'refresher' training webinars.

These take place in **April** and are open to all polling station staff across all councils.

Your designated project lead will provide you with registration links to these, nearer the time.

Hands-On Training - Training Package is Recommended

We recommend that you purchase our Training Package.

What is it?

- 2 iPads to keep for the duration of your Modern Democracy contract.
- On your Modern Polling portal - a training election is created and set up by Modern Democracy, pre-populated with test election data.
- Training package materials are available on the [support/knowledge hub](#), which includes sample poll cards and ballots to use alongside your training election on your 2 training iPads.

The 2 iPad's can be used for by-elections, for internal and external hands on experience pre-election, and as contingency iPad's on election day

Why purchase our Training Package?

- **We recommend that at least 1 person, working at each polling station, has had hands-on experience using the iPad and Modern Polling app, before election day.**
- **We recommend that you hold in-person group training sessions which allow staff to see and experience scanning poll cards and ballot papers using the iPad.**
- Your election team, can complete a demonstration using the iPads and training materials provided and then allow staff to try using the iPads themselves.
- The election can be cleared down between training sessions and used for training repeatedly, simply click on the 'CLEAR ELECTION DATA' on the 'HOME' screen, under the 'Election Data' tab.

Final (2nd) Data Upload at Minus 5

Final Data Upload at Minus 5 - How to Overwrite Registers

When you navigate to the UPLOADS page, you will see that your Polling Station Registers from Minus 19. You will be overwriting these with your Minus 5 Polling Station Registers. Follow the steps below:

1. In the Polling Station Registers section, click on **Add Files**.

This clears your existing uploaded files enabling you to drop/add your new files.

The screenshot displays the MODERN POLLING interface. At the top, there is a navigation bar with the logo and menu items: HOME, REGISTER, UPLOAD, and REPORTS. The main content area is split into two panels. The top panel, titled 'BALLOT PAPER (can only be uploaded once)', shows a successful upload of a file named 'Ballot File - Xpress Delivery Set test - Copy.csv' on 20 Nov 2024. The bottom panel, titled 'POLLING STATION REGISTERS', shows a warning to upload an updated absent voter file and a table of four successfully uploaded files, all named 'Combined Election Register X Delivery Set.csv' (where X is 2, 4, 1, and 6). A green arrow points to the 'ADD FILES' button in the top right corner of the 'POLLING STATION REGISTERS' section.

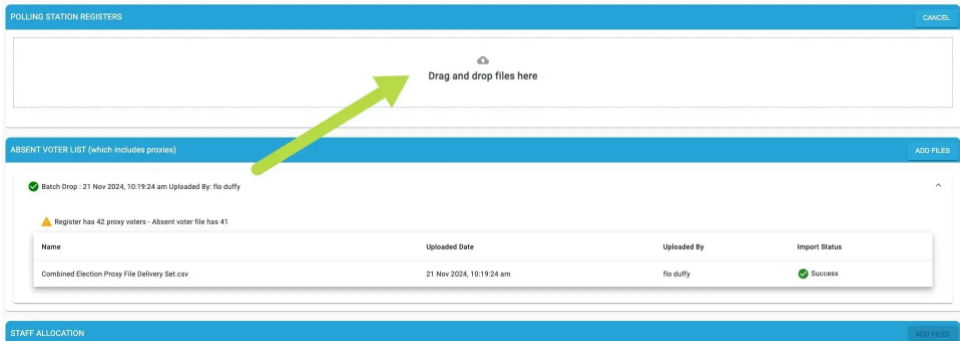
Name	Uploaded Date	Uploaded By	Import Status
Ballot File - Xpress Delivery Set test - Copy.csv	20 Nov 2024, 11:27:16 am	flr duffy	Success
Combined Election Register 2 Delivery Set.csv	21 Nov 2024, 10:12:58 am	flr duffy	Success
Combined Election Register 4 Delivery Set.csv	21 Nov 2024, 10:12:58 am	flr duffy	Success
Combined Election Register 1 Delivery Set.csv	21 Nov 2024, 10:12:58 am	flr duffy	Success
Combined Election Register 6 Delivery Set.csv	21 Nov 2024, 10:12:58 am	flr duffy	Success

The cloud icon is displayed.

2. Drag n drop or click to select (browse) files

Note: if you didn't intend to clear the files you uploaded, you can revert to them by clicking **Cancel** (top right of the panel).

Your registers will then be validated and imported



The screenshot displays the 'POLLING STATION REGISTERS' section of the Modern Polling Portal. It features a large white area with a cloud icon and the text 'Drag and drop files here'. A green arrow points to this area. Below this is the 'ABSENT VOTER LIST (which includes proxies)' section, which shows a green checkmark and the text 'Batch Drop: 21 Nov 2024, 10:19:24 am Uploaded By: flo duffy'. Below this is a table with the following data:

Name	Uploaded Date	Uploaded By	Import Status
Combined Election Proxy File Delivery Set.csv	21 Nov 2024, 10:19:24 am	flo duffy	Success

Once all registers have been uploaded and validated successfully, you can then proceed with your:

- Absent Voter File and
- Staff Allocation File.

Note: Only one staff allocation can be uploaded. Please ensure that the file is correct before uploading as any errors must be amended manually on the portal.

We do not accept any more data uploads after minus 5.

Any changes to your staff after minus 5 can be made manually at any time using the Modern Polling portal - see section 'Use the Modern Polling Portal after Minus 5'.

IMPORTANT - CHECK YOUR DATA IS CORRECT

To check ALL your data, navigate to the HOME page, this is your REGISTER and will be downloaded and used on the iPads in the Polling Stations.

Elections (2)

District - Borough/District Ward



1554
ELIGIBLE



42
PROXY



24
ANONYMOUS

Parish - Parish/Parish Ward



1554
ELIGIBLE



42
PROXY



24
ANONYMOUS

Polling Stations (6)

Find Polling Station



Number:	Polling Station:	First Elector:	Districts:	Election:	Area:	Eligible For Paper:	Ordinary:	Assigned Staff	...
1	St. James Primary School	AA-1 Angela S. Hamell Last Elector: AA-279 M N	AA	District	London	263 AA	Ordinary: 2018-5020001/ 2018-5020490 Tendered: 2018-5020001/ 2018-5020020		

Using the Modern Polling Portal - after Minus 5

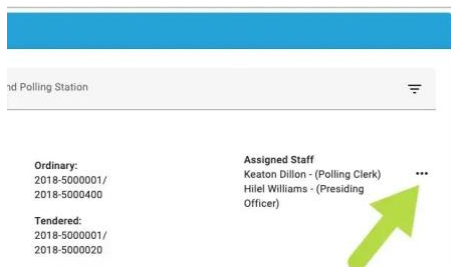
Learning objective: This section will give you the tools to view and manage your Election(s) in the build up to Election Day.

Viewing your Polling Station Staff

Staff are assigned to the station once the staff allocation file is uploaded successfully. However, if there are staff changes after -5, these are added manually per polling station.



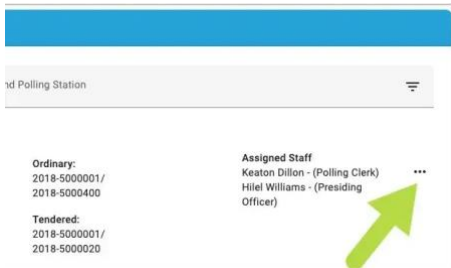
Number	Polling Station	First Elector	Last Elector	Districts	Election	Area	Eligible For Paper	Ordinary	Tendered	Assigned Staff
1	St. James Primary School	AA-T Angela S. Hamell	AA-279 N N	AA	District	London	263 AA	2018-5000001/ 2018-5000400	2018-5000001/ 2018-5000020	Keaton Dillon - (Polling Clerk) Hilal Williams - (Presiding Officer) ...



Assigned Staff
Keaton Dillon - (Polling Clerk) Hilal Williams - (Presiding Officer) ...

- To add a staff member to a Polling Station (e.g. Station 1) on the far-right column (to the right of Assigned Staff) click on the ellipsis (...) icon. Then click on **ADD/EDIT STAFF** in the menu.

Assigning Staff (manually) Staff Manually



To add a staff member to a Polling Station (e.g. Station 1) on the far-right column (to the right of Assigned Staff) click on the ellipsis (...) icon. Then click on **ADD/EDIT STAFF** in the menu.

The Polling Staff Details are displayed for the polling station. You can add a new staff member by clicking on ADD STAFF and filling in their details. It will take a few minutes for it to appear on the Home page (under Assigned Staff column in Polling Stations).

Polling Staff Details

Polling Station: 1

St. James Primary School

The screenshot shows a dialog box titled 'Polling Staff Details' with a close button (X) in the top right corner. Below the title, it displays 'Polling Station: 1' and 'St. James Primary School'. At the bottom right of the dialog, there is a blue button labeled 'ADD STAFF' with a plus icon. A green arrow points to this button. Below the button is a table with the following data:

First Name	Last Name	Role	Contact Number	Actions
Keaton	Dillon	Polling Clerk	+44710000001	
Hiel	Williams	Presiding Officer	+44710000007	

The 'Add New or Assign Existing Staff Member' dialog is displayed, enter the details:

- First Name
- Last Name
- Role (defaults to Poll Clerk)
- Phone Number (enter without the zero).
Note: this number must be unique, otherwise it will fail to add.
- Click on **SAVE**.

The screenshot shows a dialog box titled 'Add A New Or Assign An Existing Staff Member' with a close button (X) in the top right corner. The dialog contains the following fields:

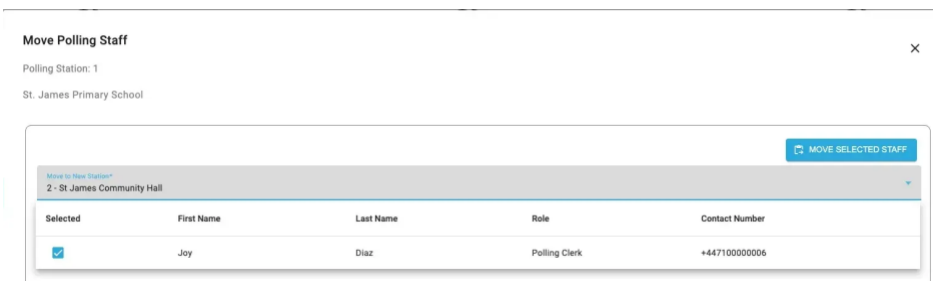
- First Name:
- Last Name:
- Role: (dropdown menu)
- Phone Number:

At the bottom of the dialog, there are two buttons: 'CANCEL' and 'SAVE'.

Moving Staff (manually) from one Station to Another

Staff can be moved from one polling station to another.

This is also done by clicking on the **ellipsis** icon (...) and selecting **MOVE STAFF** from the menu.



- Under the '**Selected**' column in the table, select the Staff member you wish to move.
- Above the table from the '**Move to New Station**' dropdown menu, select the station you want to move the staff member to.
- Click on **MOVE SELECTED STAFF** button above the dropdown menu.
- A message is displayed "**Are you sure you want to move e.g. 1 staff to e.g. station: 2?**
- Click **YES**.
- Click on the **Close** icon (x).
- On the Home page, under polling stations you can see the staff member assigned to a new station (E.g. station 2) and removed from the previous (e.g. Station 1).

Viewing Polling Station Details

To view a polling stations details, you can click on any of the text (e.g First Elector for that station) or by clicking on the ellipsis (...) icon to the far right (beside Assigned Staff) and then clicking on 'VIEW STATION DETAILS'.

Published date: FEBRUARY 2025

Polling Stations (6)										
Find Polling Station										
Number: 1	Polling Station: St. James Primary School	First Elector: AA-1 Angela S. Harrell Last Elector: AA-279 N N	Districts: AA	Election: District	Area: London	Eligible For Paper: 263 AA	Ordinary: 2018-5000001/ 2018-5000408 Tendered: 2018-5000001/ 2018-5000020	Assigned Staff: Kaitlan Dillon - (Polling Clerk) Hilar Williams - (Presiding Officer)	...	VIEW STATION DETAILS ADD/EDIT STAFF MOVE STAFF
Number: 2	Polling Station: St. James Community Hall	First Elector: AB-1557 Dean S. O'Brien	Districts: AB	Election: District	Area: London	Eligible For Paper: 271	Ordinary: 2018-5000401/	Assigned Staff: Oscar Pennington - (Presiding Officer)	...	

Polling Station details displays the Number, Name and Address.

Beneath which are two tabs:

- **Election Data** tab - displays the Polling Station Name, Address, Election Contest(s), the breakdown of the electorate for that polling station.
- **Election Support** tab - displays the turnout per election and per hour for that station.

As you scroll, the **Overview** and **BPA** (Ballot Paper Account) tabs are displayed.

Scroll down to see **Devices** and **Signal Strength**.


NOTE: for this information to be accurate, the iPad(s) must have 4G internet connectivity or Wifi.

Overview BPA





Ballots

Election Ref	Electoral Area	Ordinary Ballots	Tendered Ballots
District	London	Color	4 Color
		Box	1 Box
		Book Count	4 Book Count
		UM	2018 UIM
		From	5000001 From
		To	5000400 To
		5000001	5000020
Parish	London	Color	4 Color
		Box	1 Box
		Book Count	4 Book Count
		UM	12 UIM
		From	5000001 From
		To	5000400 To
		5000001	5000020

Devices

 Florence Duffy
 Station Machine
 Device ID: 5f96c48416a468499643b432037ef99
 Battery: 85%
 Records to Sync: 0
 Role: Election Manager
 Contact: [\[Redacted\]](#)

Signal Strength

 O2
  Vodafone
  EE
  Three

Polling Station Details - Overview Tab > Devices

The Devices section displays the staff member and their **status** as their **battery** level.

You can monitor this on election day in the Election Support tab, if they are not active then the voters processed offline will not sync to the Election Manager portal. The polling station must have a 4G internet connection or wifi for the portal and app to communicate (you will not see an accurate turnout or BPA for that station if there is not internet connectivity).

The Presiding Officer should have informed you that they are working offline, if not you need to contact the Presiding Officer to investigate as it also means the station will not receive clerical errors and emergency proxies.

IMPORTANT: The Poll Clerks and Presiding Officers are trained to monitor the battery level, however it is also important for you to also monitor it to ensure they are using Modern Polling to process voters. Additionally, keeping the iPad charged helps ensure that the station can continue to operate if a power cut happens.

Devices

 Florence Duffy
Status: Inactive
Device ID: 9d96c48416a46849f63b6320574f99
Battery: 83%
Records to Sync: 0
Role: Election Manager
Contact: [\[redacted\]](#)

Polling Station Details - Overview Tab > Signal Strength

The Signal Strength section displays the mobile phone networks available in the area:

- O2 (SIM provided)
- EE
- Vodafone
- Three

Note: these are only indicators, and a proper field test would need to be executed in order to ensure 4G internet connectivity.

If you do not wish to use O2 and use an alternative provider, please contact your Project Lead.

Signal Strength

O2



Vodafone



EE



Three





Polling Station Details - BPA Tab

The BPA tab shows a live view of your Ballot Paper Account(s) for the polling station, it is updated in realtime throughout the day.

If the Ballot Paper Account has been submitted, there is a green tick and timestamp displayed under the 'Submitted' column.

Station staff may attach notes to the BPA, which you can view in the 'Notes' column.

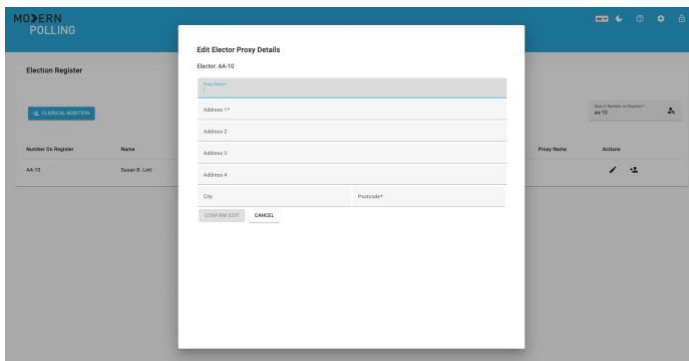
Note: this will only be accurate if the iPad has 4G internet connectivity or Wifi.

Overview		BPA					
Election Ref	Electoral Area	Ordinary Totals		Tendered Totals		Submitted	Notes
District	London	First Ballot Number	2018-5000001	First Ballot Number	20185000001	 Feb 5, 2025, 10:27:40 AM	Was late submitting The BPA due to connectivity issues,
		Next Ballot Number	2018-5000006	Next Ballot Number	20185000002		
		Total Received	400	Total Received	20		
		Total Unused	395	Total Unused	20		
		Total Issued	5	Total Issued	0		
		Total Issued and Not Spoilt	5	Total Issued and Not Spoilt	0		
Total Spoilt	0	Total Spoilt	0				
Parish	London	First Ballot Number	12-5000001	First Ballot Number	125000001	 Feb 5, 2025, 10:27:40 AM	
		Next Ballot Number	12-5000006	Next Ballot Number	125000002		
		Total Received	400	Total Received	20		
		Total Unused	395	Total Unused	20		
		Total Issued	5	Total Issued	0		
		Total Issued and Not Spoilt	5	Total Issued and Not Spoilt	0		
Total Spoilt	0	Total Spoilt	0				

Adding an Emergency Proxy

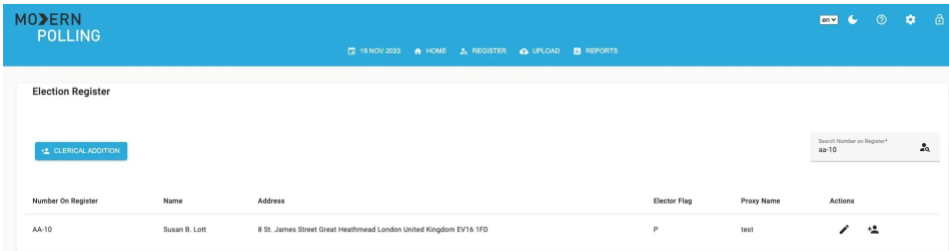
The **Register** allows you to **Edit an Elector's details**, add **Emergency Proxy** and **Add an Elector to the Register** (Clerical Error).

- To add an Emergency Proxy, from the top navigation menu click on **REGISTER**.
- First, you need to find the elector by entering the Elector's number on the register (including the polling district letters) in the **Search Number on Register** box and click the **Search icon**(or tap Enter on keyboard). The elector's details are displayed.
- Click on the **Add Emergency Proxy** icon (hover to see the tooltip)
- Enter the Proxy voter's details as required and click **CONFIRM EDIT**.
- **"Successfully Assigned Proxy"** Message will be displayed.
- Click **OK**



You are returned to the Register screen with the voter's details. Under the Elector Flag column you can see a P flag displayed. To check the proxy voter details you just added click on the **Add Emergency Proxy** icon.

Note: for this to be displayed on the iPad in the polling station, the iPad must have 4G internet connectivity or Wifi.



Adding a Clerical Error

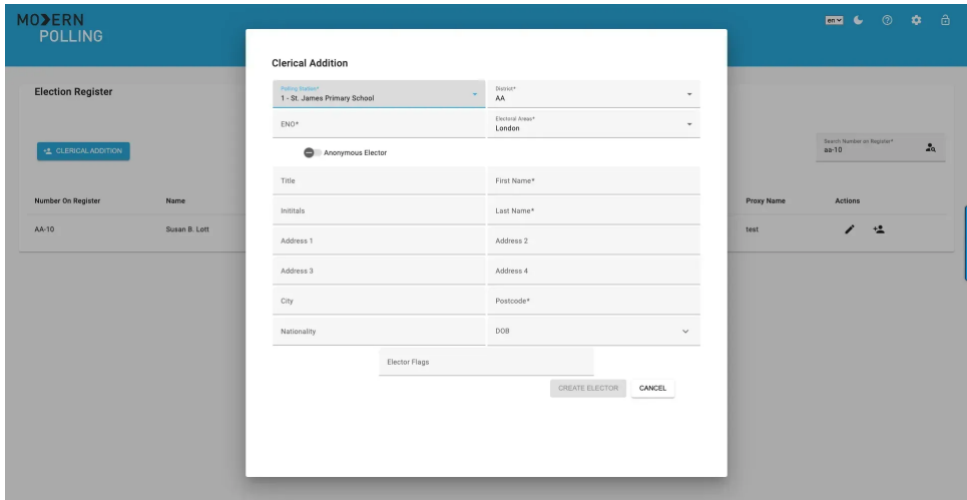
You may need to add an elector manually (i.e., a Clerical Error) after the -5 electoral registers are uploaded.

You may need to add an elector manually (i.e., a Clerical Error) after the -5 electoral registers are uploaded.

- Click **CLERICAL ADDITION**.
- Enter the Elector's details
- Click **CREATE ELECTOR**.
- Elector has been added successfully.
- Click **OK**.

The newly added Elector is displayed.

Note: for this to be displayed on the iPad in the polling station iPad must have a 4G internet connection or Wifi.



Change Voter to Postal Voter

Voters can switch to postal vote up to and including polling day.

If a voter becomes entitled to a postal vote on election day the process is as follows:

- The Election Manager determines what station the elector is registered to.
- The Election Manager logs into an iPad to check if the voter has already voted.
- If the voter has not already voted, the Election Manager prints the postal pack and presents it to the voter.
- The Election Manager changes the voter to be a postal voter on the portal

To change an elector to a postal:

Perform a search on the **Register**.

- Under the '**Postal**' column, simply click on the checkbox and it changes the voter to a postal voter.

Note: the elector did not have **Elector Flags** prior to this and now has an '**A**' Elector Flag displayed.

Note: The change to postal status will synchronise to the iPad, **ONLY** if the iPad is online. Please check the iPad for that station is online (see section Election Day - Dashboards).

Election Register							
Number On Register		Name	Address	Postal	Elector Flag	Proxy Name	Actions
AA-12		Kevin C. Jones	10 St. James Street Great Heathmead London United Kingdom EV16 1FE	<input checked="" type="checkbox"/>	A		

The example above, displays a voter who is now a postal voter, the corresponding A flag is displayed under Elector Flags. **Note:** No other Elector Flags.

Let us look at another scenarios: Elector **has a Proxy Flag** - how to make them a postal proxy.

1. Elector has a Proxy Flag - how to make them a postal proxy

- Perform a search on the Election Register.
- Under the **Elector Flags** column, a 'P' flag is displayed and under the **Proxy Name** column, the name (e.g., Harry Smith) is displayed.

Election Register							
Number On Register		Name	Address	Postal	Elector Flag	Proxy Name	Actions
AA-30		Inga Q. Davenport	28 St. James Street Great Heathmead London United Kingdom EV16 1FE	<input type="checkbox"/>	P	frank torres	

- Under the 'Postal' column, simply click on the checkbox and it changes the elector to a **postal proxy** voter.
- Under the **Elector Flags** column, 'PA' flags are displayed.

Election Register

Clerical Addition

Search by Elector Details*
aa-30

Number On Register	Name	Address	Postal	Elector Flag	Proxy Name	Actions
AA-30	Inga Q. Davenport	28 St. James Street Great Heathmead London United Kingdom EV16 1FE	<input checked="" type="checkbox"/>	PA	frank torres	 



iPad Delivery/Distribution to Presiding Officers

Learning objective: How to distribute your iPads to your Presiding Officers before Election Day.

iPad Delivery

The most important aspect of the Modern Polling pre-election preparation is the iPad distribution process by Presiding Officers.

Your iPad's will arrive 1 week before the election, the details of which will be agreed upon nearer the time, with your Project Lead.



iPad Delivery

A paper copy checklist will be provided with the delivery of iPads. This will contain the number of iPads, Power Supply Units (PSUs), and lightning cables that are assigned to you. You will check that you have the correct equipment numbers and report any issues to your Project Lead at your earliest convenience.

iPad Distribution to Presiding Officers

When?

iPads should be distributed to the Presiding Officers prior to Election Day.

It is very important that the iPads are distributed following the steps below.

We ask Presiding Officers to log in and check their station details. This ensures that they:






- **Can log in to the iPad**
- **Are assigned to the correct station.**
- **Complete checks and quit the app.**

When logged in they must then complete the data checks, confirming the total number of electors and that the ballot book details match the ballots in the ballot box.

Next, they must log out of the app and then quit the app. **This is a vital step that cannot be missed as doing this enables the Presiding Officer to use Modern Polling on Election Day if they do not have internet access. If this step is not completed, and they do not have internet connectivity on election morning, then they will not be able to use Modern Polling.**

Please print the below and ensure your PO's follow these steps on collection of their iPads.

iPAD COLLECTION

- 1**  **LOG IN**
Click on the **Modern Polling App** icon and log into the Modern Polling App.
- 2**  **CONFIRM POLLING STATION**
Confirm the **Polling Station Details** AND the **Ballot Paper Range(s)**.
- 3**  **CONFIRM TOTAL ELECTORS**
Tap on **Search Register** on the home screen, check all electors have loaded. ALSO check you can search for an elector AND check the number of Total Ballots, tap **View CNL**.
- 4**  **LOG OUT**
Tap on the **Lock icon** on the top right of the screen, then tap **YES** on the 'Are you sure you want to log out?' dialog.
- 5**  **QUIT THE APP**
You **MUST** quit the app after logging out. Press the **'home'** button on the iPad twice and **slide the Modern Polling App up** and off the screen.

If the Presiding Officer cannot log in

Please check on the Modern Polling portal that the Staff member is allocated to the correct Polling Station, has the correct role and is using the correct Mobile number. If all these details are correct and the Presiding Officer cannot log in, please **raise a case** on our [Support/Knowledge Hub](#).

Hardware Checks

A paper copy checklist is provided with the delivery of the iPads. This will contain the number of iPads, Power Supply Units (PSUs) and lightning cables that are assigned to you. Please check that you have the correct hardware numbers as stated on the checklist. If there are any discrepancies, please advise your Project Lead.

Please complete your section of the checklist to sign off on equipment numbers being returned and include this in the box on collection.

Note: You are liable to pay for any missing/damaged hardware.

Contingency iPads

- Modern Democracy recommend having 10% contingency iPad's of the number of polling stations using Modern Polling on election day.
 - We recommend that you give these to your Polling Station Inspectors, in case your polling staff require them. They can deliver them to the affected polling station.
 - Consider having a contingency iPad in rural Polling Stations which are within a longer distance to reach if one needs to be delivered.
 - If a contingency iPad is needed, the PO must isolate the original, with a sticker containing the poll station number and a brief explanation, so that this can be investigated post-election.
 - If a contingency iPad is needed, data must be synced on the original iPad, to submit the BPA. Simply log into Modern Polling on the original iPad, in an area of good internet connectivity and the data will sync.
-

Polling Station Requirements



Location of Power Sockets

Do consider the location of the power sockets as you plan for setting up the booths for each polling station. We recommend that the iPads are plugged in at all times throughout election day.



Extension Leads

Depending on the location of the power sockets, you may need to consider having extension leads for charging the iPads. We recommend that the iPads are plugged in at all times throughout election day.



Power Banks

If power via a power socket or via an extension lead is not possible, do consider having power banks that are fully charged, as a back up. Use these to recharge the iPads when it falls to 70% or below.



Wi-Fi

While the iPads come with a 4G enabled data sim, it is always advisable to check for Wi-Fi access in the stations as a backup. This is crucial, especially in stations where it is known to be in an area with poor coverage.



Portable Hotspot Hubs

If the polling station has no Wi-Fi backup, and is in an area with poor connectivity, it is advisable to check if there are portable hotspot hubs, or use personal hotspots via mobile phones, for internet access.

Election Day - Dashboards

Election Morning - Checks

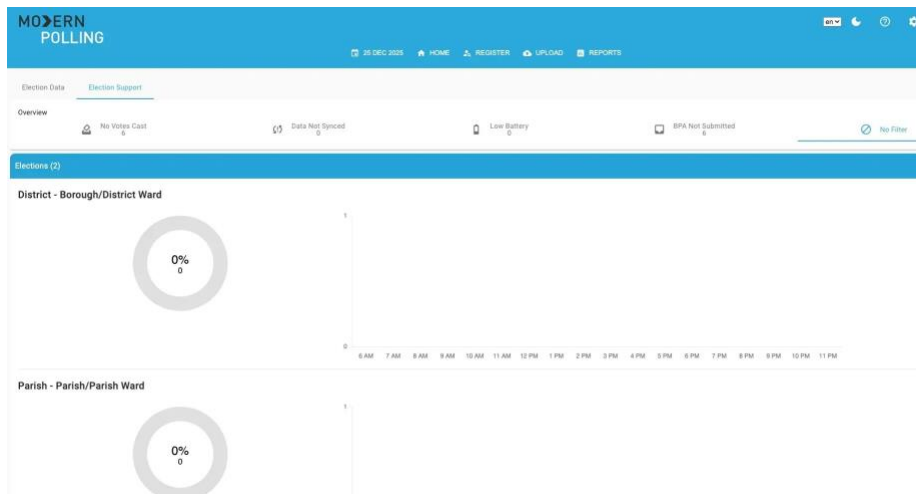
On election morning, you will want to be checking for:

- **Status of Devices (iPad's)**
- **No Votes Cast**

The **Election Support** tab on your portal, is where you will see this information.

- Device status will allow you to see if the iPad is active/in use, therefore if the user (staff member) is logged in, and it displays the details of the user.
- No Votes Cast allows you to view the overall number as well as individual details of polling stations in which no voters have been processed.

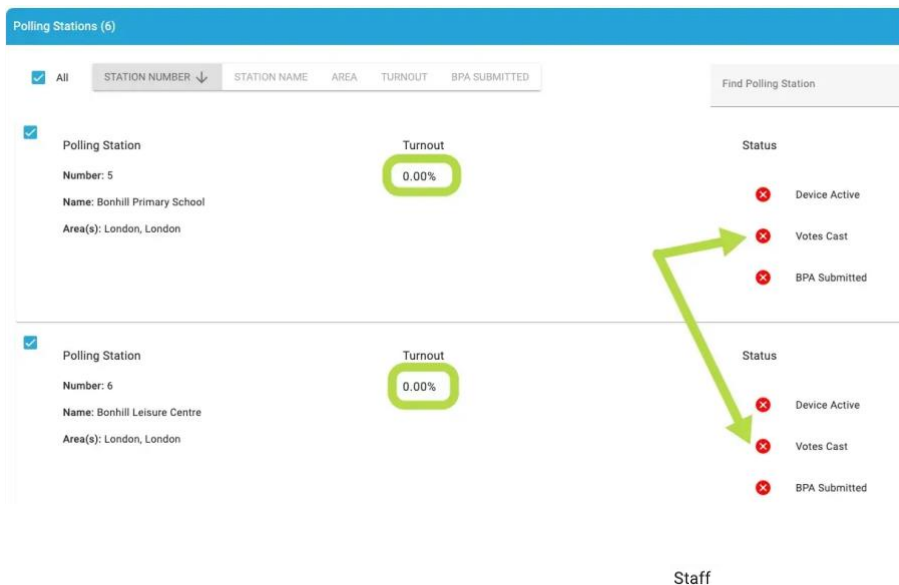
These tools allow you the option to make decisions on whether you need to make contact with a PO at a particular polling station.



In this example, I clicked on 'No Votes Cast - 2 Stations', A filter will be applied to display the two stations. Turnout graphs are at zero. If I scroll down the list of filtered Polling Stations (2), there are 2 Polling Stations where there has been no votes cast.

If there are **no votes cast** a **red** icon with an x is displayed and the **Turnout is 0.00%**.

If the station is open with **no votes cast**, logged out and the Election Manager has not been notified of 4G internet connectivity issues, contact the Presiding Officer for that polling station.



Under the Staff column, the staff member's name is displayed. Details on their **Status, Battery, Records to Sync** and **Role** are displayed. It is important to keep an eye on this throughout the day, advise your staff to keep the iPad charged at all times.

Green battery $\geq 50\%$

Amber battery 21% to 49%, battery in low power mode (need to charge)

Red battery $\leq 20\%$ (need to charge immediately)

Election Day - Checks

Throughout the day, it is important to keep the **Election Support** tab open. During election day, you will want to be checking for:

- **Turnout**
- **Data Not Synced**
- **Low Battery**

You are able to view turnout per station, per election, and per hour. Turnout is displayed in graph format for all stations by default, although it is also displayed numerically.

Data not synced will display stations that connectivity issues may be occurring.

Low battery helps identify iPad's which have fallen below our recommended level of charge.

These tools allow you the option to make decisions on whether you need to make contact with a PO at a particular polling station.

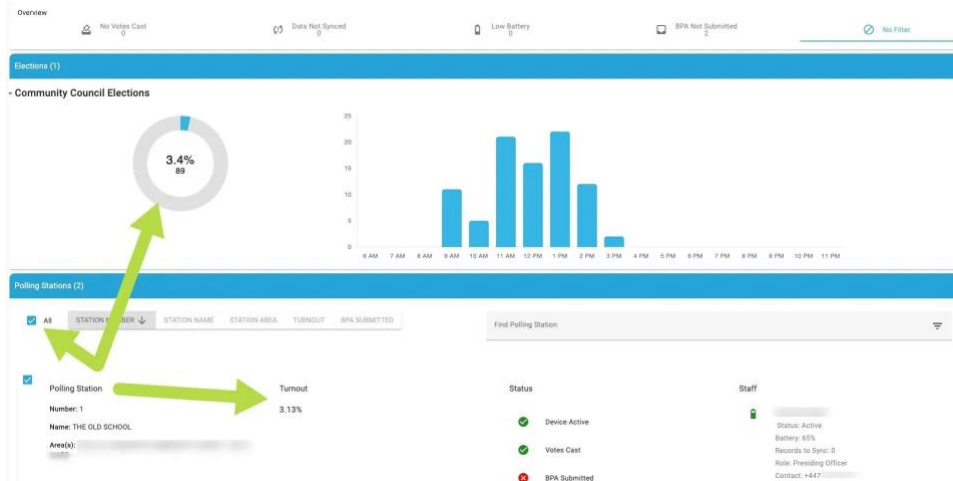
In the Overview panel you will see if there are iPads with **Data Not Synced** and if there are iPads with **Low Battery**.

You will also be keeping an eye on the turnout. **Note:** the graphs default to turnout for all polling stations. To see the turnout for specific stations, scroll down to the Polling Stations table (we will view this in the next slide).

STATION NUMBER	STATION NAME	STATION AREA	TURNOUT	BPA SUBMITTED	find polling station
✓	2	St James Community Hall	3.13%	Device Active Votes Cast BPA Submitted	Staff Status: Active Battery: 65% Records to Sync: 0 Role: Presiding Officer Contact: +44

Election Day - Turnout

Turnout is displayed in graph format for all stations by default and it is also displayed numerically in the Polling Stations table.



To see the turnout for a particular polling station - graphically, you deselect the checkbox in the table and then select the checkbox on the polling station you wish to view. It will show you turnout per station, per election and per hour. You can remove individual stations from this view by left-clicking on the checkbox beside their entry. This will update the graphs accordingly.

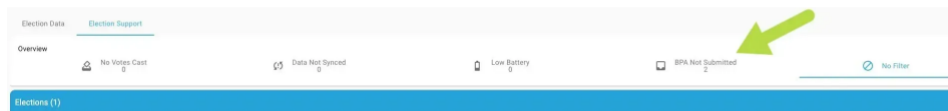
Election Close of Poll - Checks

At close of poll, you will want to be checking for:

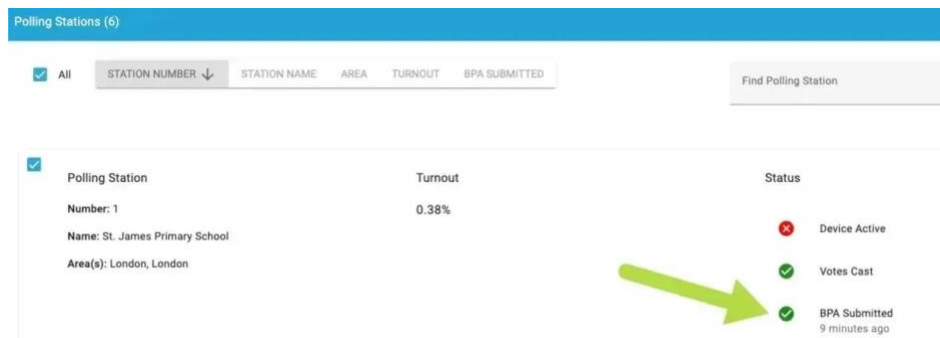
- **BPA not submitted**

The **election support** tab on your portal, is where you will see this information.

You are able to see which polling stations have/have not, submitted their Ballot Paper Accounts by clicking on '**BPA Not Submitted**' this will filter the view to only show stations that have not submitted their ballot paper accounts.



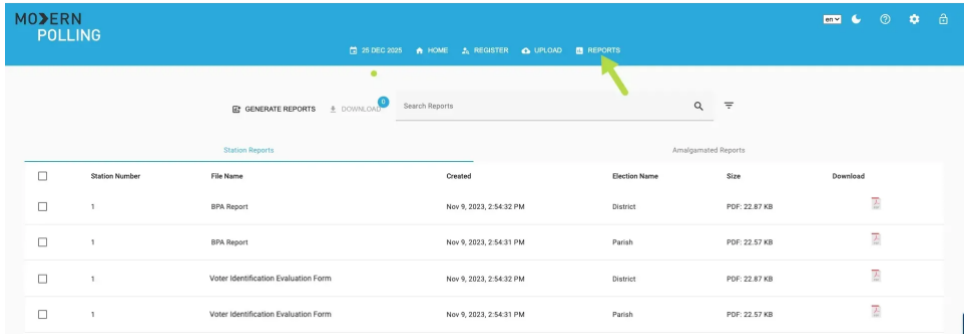
Ballot Paper Accounts that have been submitted successfully are timestamped, and are displayed in the Polling Stations table with a green tick.



Close of Poll - Election Reports

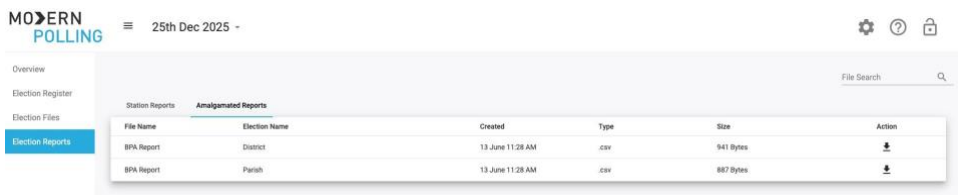
Election Reports are available when the PO submits the Ballot Paper Account(s) for their station at Close of Poll.

- To view the reports, click on **REPORTS** in the left-hand navigation menu.
- In the **Station Reports** tab, the **BPA Report** (Ballot Paper Account) and **Voter Identification Evaluation Form (VIDEF)** are the most important reports, therefore generated immediately for each station and for each election.



In the **Amalgamated Reports** tab, the amalgamated **BPA Report** is displayed for each election for all stations.

Note: the **Voter Identification Evaluation Form** is not amalgamated until all POs have submitted their BPA Reports.



There are additional reports per station per election (which includes your CNL, BPRL, Voter Stats etc..) these will take time to generate... and can be done post-election when required.

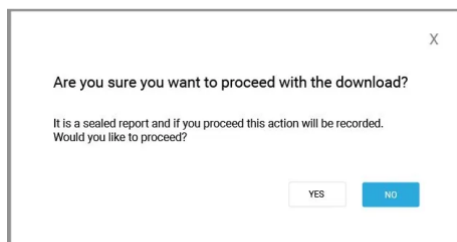
To generate the additional reports, go back to the **Station Reports** tab and click on **Generate Reports**.

You can see the additional reports for each station and for each election in csv and pdf formats:

- **Ballot Paper Refusal List** (BPRL) - this is a Voter ID report in line with the Elections Act 2022
- **BPA Report** (Ballot Paper Account)
- **Corresponding Number List** (CNL)
- **Marked Proxy Register**
- **Marked Register**
- **Voter Identification Evaluation Form** (VIDEF) - this is a Voter ID report in line with the Elections Act 2022
- **Sealed CNL and Marked Register Report** (displayed if Seal is broken and was co-signed by an Polling Agent)
- **Voter ID Statistics**

In the Amalgamated Reports tab, the **Voter Identification Evaluation Form** (VIDEF) is not generated until **Ballot Paper Accounts** (BPAs) have been submitted for ALL polling stations.

Close of Poll - Downloading Reports



Election reports can be downloaded in csv and pdf format.

IMPORTANT: if you click on a 'sealed report' one with a padlock, you will be asked if you are sure you want to proceed with the download. All downloads of sealed reports are recorded and a **Seal Audit Report** can be generated (typically done after exporting all your election files).

- You can filter the reports by **Type** or **Election Name**, e.g. enter **Parish**

Election - Support

Support (Election Lead-Up & Election Day)

Support is available up to and including Election Day.

- Please ask your Presiding Officers and Poll Clerks to contact, you their Election Manager in the first instance, and then please contact Modern Democracy if further support is needed.

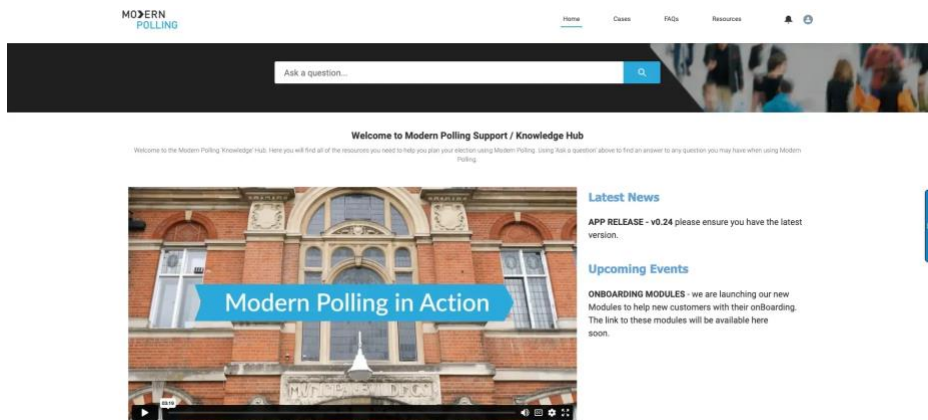
Election Managers can raise cases directly with Modern Democracy. On Election Day a resolute team will be on hand to manage these, with Election Day SLAs to ensure the highest levels of support.

Modern Democracy Support / Knowledge Hub

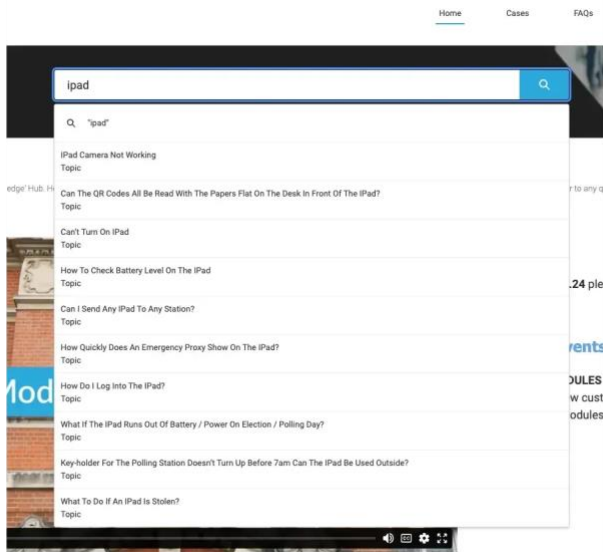
To get help with an issue, please use our new knowledge hub.

Log into Modern Democracy [Support/Knowledge Hub](#)

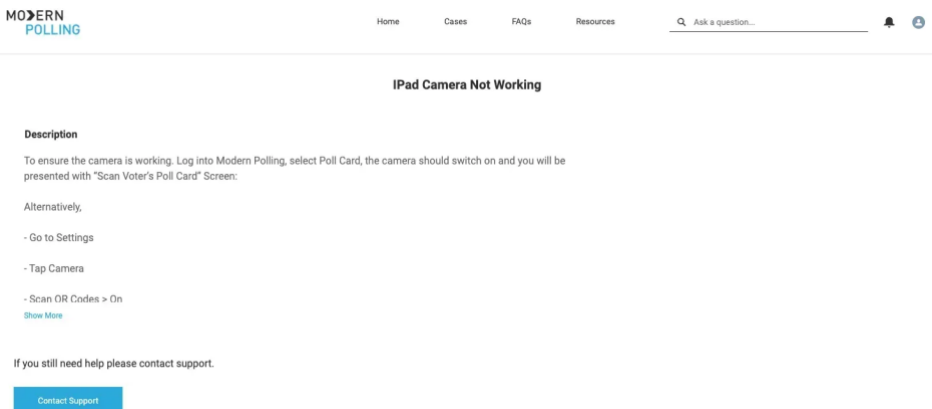
- ♦ Enter your query in the 'Ask a question...' search box



- ◆ As you start to type, autocomplete generates predictions that help you save time by allowing you to quickly complete the search.
- ◆ Select the search option to find out more information



- ◆ You are then redirected to more information on your query.



- Click on 'Show More'
- Then follow the steps as outlined (and pass the information onto your staff).
- If that does not resolve the issue, please click on '**Contact Support**' to raise a case.

In the unlikely event that any issues need escalating a standalone Critical Incident team will also be in operation

All of Support and Contingency is covered in the **Support Process** document under **Resources** in our Support /Knowledge Hub.

Voter's that were manually recorded on paper

If a PO was unable to use the Modern Polling app and had to record voters on paper, at close of poll, or during a quiet time at your station those voters need to be added to the Modern Polling app to ensure the BPA and election reports are correct.

For example, if you processed the first 10 ballots manually (on paper) then log into the app and process the next voter (e.g. voter number 11) you would have skipped the first 10 ballots to get back on track. This then means the details need to be added manually to the app to match what was recorded on paper.

If your staff had to record manually, please raise a case using your Support / Knowledge hub.

Post Election (Reports, Feedback & iPad Collection)

VIDEF (Voter Identification Evaluation Form)

Voter identification evaluation form

Polling station information		
Date: 5/2/2024	Polling Station Number: 1	
Post: AA	Polling Station Address: Main Street, Great Heathmead, London, EY16 1LV	
Was a meeter/greeter employed at your polling station (for the majority of the day) who would ask voters whether they had voter ID before they got to the front desk?	YES / NO	
1. Electoral identity documents (information from voter identification notes sheet section 1)		
How many voters produced each of these identification documents?		
1a	A Voter Authority Certificate	1
1b	An Anonymous Elector's Document	1
2. Privacy (information from voter identification notes sheet section 2)		
How many times did voters ask to show their identification in private		0
3. Unable to issue a ballot paper (information from voter identification notes sheet section 3)		
3a	How many voters were not issued with a ballot paper in total?	1
3b	How many voters came back and were issued with a ballot paper?	0
4. Refusal to deliver a ballot paper (information from Ballot Paper Refusal List)		
4a	How many voters did the Presiding Officer refuse to issue a ballot paper to? (Count all entries in left-hand column)	1
4b	How many voters came back later and were issued with a ballot paper? (Count all entries in right-hand column)	0

The BPA Report and Voter Identification Evaluation Form (the VIDEF) are displayed for each election type and for each station in PDF format and there's also a csv version of the VIDEF.

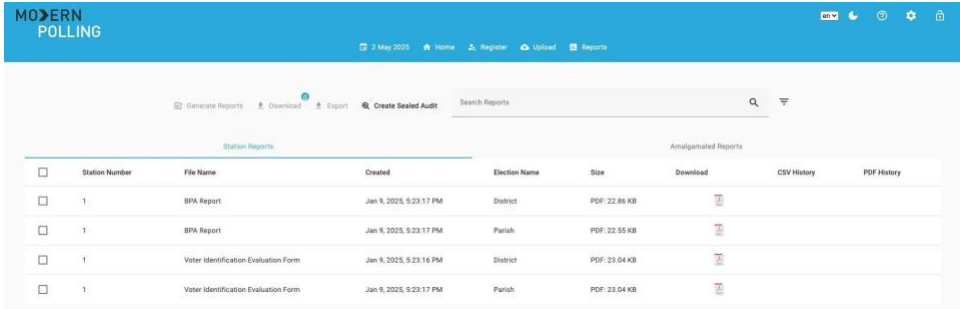
One record will not be populated by using Modern Polling:

"Was a meeter/greeter employed at your polling station (for the majority of the day) who would ask voters whether they had voter ID before they got to the front desk?"

The Yes/No question will not be completed automatically by Modern Polling. You should refer to the latest Electoral Commission guidance for how to collect and submit that information.

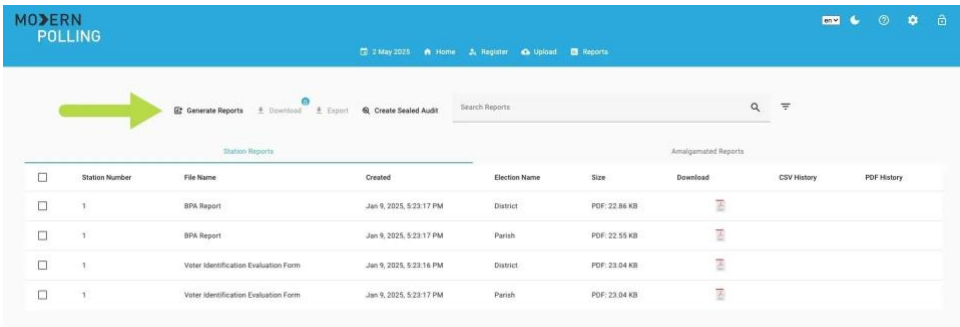
How to Generate Additional Reports

We generate the BPA and VIDEF, the most important reports immediately at close of each station.



There are additional reports per station, per election, (which includes your CNL, BPR, Voter Stats etc..) these take time to generate, and can be done post election when required.

To generate all of your reports you must contact your Project Lead and they will enable the **Generate Reports** button (disabled by default).



Once enabled, click **Generate Reports**. A message is displayed 'Polling station reports and amalgamated reports are being generated. Note: the Generate Reports button will be disabled.' Click OK.

Reports are displayed as they are generated.

Station Reports				Amalgamated Reports				
<input type="checkbox"/>	Station Number	File Name	Created	Election Name	Size	Download	CSV History	PDF History
<input type="checkbox"/>	1	Ballot Paper Refusal List	Jan 9, 2025, 8:23:29 PM	District	PDF: 16.8 KB			
<input type="checkbox"/>	1	Ballot Paper Refusal List	Jan 9, 2025, 8:23:29 PM	Parish	PDF: 16.69 KB			
<input type="checkbox"/>	1	Ballot Paper Refusal List	Jan 9, 2025, 8:23:28 PM	District	CSV: 82 Bytes			
<input type="checkbox"/>	1	BPA Report	Jan 9, 2025, 5:23:17 PM	District	PDF: 22.86 KB			
<input type="checkbox"/>	1	BPA Report	Jan 9, 2025, 5:23:17 PM	Parish	PDF: 22.55 KB			
<input type="checkbox"/>	1	Corresponding Number List	Jan 9, 2025, 8:24:51 PM	District	PDF: 54.85 KB			
<input type="checkbox"/>	1	Corresponding Number List	Jan 9, 2025, 8:24:10 PM	Parish	PDF: 54.99 KB			
<input type="checkbox"/>	1	Marked Proxy Register	Jan 9, 2025, 8:23:28 PM	District	CSV: 2.63 KB PDF: 21.76 KB			
<input type="checkbox"/>	1	Marked Proxy Register	Jan 9, 2025, 8:23:28 PM	Parish	CSV: 2.63 KB PDF: 21.76 KB			
<input type="checkbox"/>	1	Marked Register	Jan 9, 2025, 8:23:28 PM	District	CSV: 29.65 KB PDF: 83.71 KB			
<input type="checkbox"/>	1	Marked Register	Jan 9, 2025, 8:23:28 PM	Parish	CSV: 29.65 KB			

Checking Generated Reports





- **Ballot Paper Refusal List (BPR)** - this is a Voter ID report in line with the Elections Act 2022
- **BPA Report** (Ballot Paper Account)
- **Corresponding Number List (CNL)**
- **Marked Proxy Register**
- **Marked Register**
- **Voter Identification Evaluation Form (VIDEF)** - this is a Voter ID report in line with the Elections Act 2022
- **Voter ID Statistics**
- In the Amalgamated Reports tab, the **Voter Identification Evaluation Form (VIDEF)** is not generated until **Ballot Paper Accounts (BPAs)** have been submitted for **ALL** polling stations.

Station Number	File Name	Election Name	Date	Size	Action
1	Ballot Paper Refusal List	District	2025-01-09 17:29:29	16.8 KB	
1	Ballot Paper Refusal List	Parish	2025-01-09 17:29:29	16.69 KB	
1	Ballot Paper Refusal List	District	2025-01-09 17:28:28	82 Bytes	
1	BPA Report	District	2025-01-09 17:17:17	22.86 KB	
1	BPA Report	Parish	2025-01-09 17:17:17	22.55 KB	
1	Corresponding Number List	District	2025-01-09 20:51:51	54.85 KB	
1	Corresponding Number List	Parish	2025-01-09 20:10:10	54.99 KB	
1	Marked Proxy Register	District	2025-01-09 17:28:28	2.63 KB 21.76 KB	
1	Marked Proxy Register	Parish	2025-01-09 17:28:28	2.63 KB 21.76 KB	
1	Marked Register	District	2025-01-09 17:28:28	29.65 KB 83.71 KB	
1	Marked Register	Parish	2025-01-09 17:28:28	29.65 KB	

If you wish to amalgamate these and combine all the reports for all stations, you can do this in the **Amalgamated Reports** tab.

Note: to generate the amalgamated Voter Identification Evaluation Form (VIDEF) for all polling stations, all Ballot Paper Account(s) must be submitted by the POs.

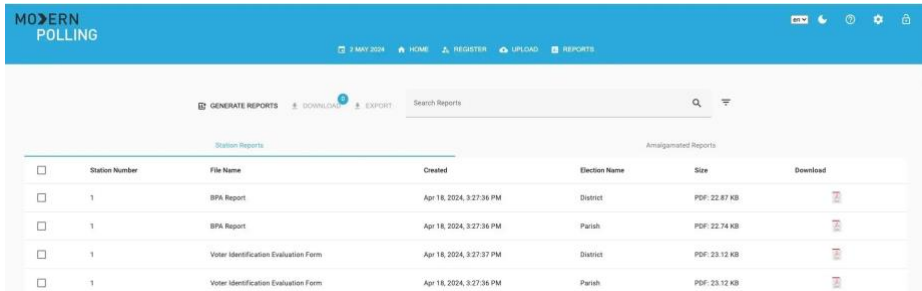
Sealed Reports

File Name	Election Name
 Ballot Paper Refusal List	District
 Ballot Paper Refusal List	Parish
 Ballot Paper Refusal List	
BPA Report	District
BPA Report	Parish
 Corresponding Number List	District





- Digital sealed documents, have the equivalence of how paper-based electoral files are sealed.
- A padlock icon verifies that the reports are sealed - the Ballot Paper Refusal List, CNL and Marked Register.
- If sealed documents on the portal are accessed for download, the user is informed that all downloads are reported and an Audit trail report is generated.
- One to four people (agents) can sign and apply a unique seal to ensure seal integrity (using the Modern Polling app via the View BPA screen).

Downloading Reports

To download reports, you can do this individually by clicking on the file type (e.g. PDF or CSV).



The screenshot shows the 'MODERN POLLING' interface. At the top, there is a navigation bar with the date '3 MAY 2024' and links for 'HOME', 'REGISTER', 'UPLOAD', and 'REPORTS'. Below this, there are tabs for 'GENERATE REPORTS', 'DOWNLOAD', and 'EXPORT'. A search bar is present with the text 'Search Reports'. The main content area is divided into two sections: 'Station Reports' and 'Amalgamated Reports'. The 'Station Reports' section contains a table with the following data:

<input type="checkbox"/>	Station Number	File Name	Created	Election Name	Size	Download
<input type="checkbox"/>	1	BPA Report	Apr 18, 2024, 3:27:36 PM	District	PDF: 22.87 KB	
<input type="checkbox"/>	1	BPA Report	Apr 18, 2024, 3:27:36 PM	Parish	PDF: 22.74 KB	
<input type="checkbox"/>	1	Voter Identification Evaluation Form	Apr 18, 2024, 3:27:37 PM	District	PDF: 23.12 KB	
<input type="checkbox"/>	1	Voter Identification Evaluation Form	Apr 18, 2024, 3:27:36 PM	Parish	PDF: 23.12 KB	

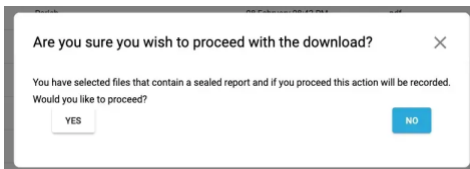


IMPORTANT: if you click on a 'sealed report' one with a padlock, you will be asked if you are sure you want to proceed with the download. All downloads of sealed reports are recorded and can be viewed by clicking on **Create Seal Audit**.

If you wish to download all the files, click on the 'master select' checkbox on the top left of the table.

<input type="checkbox"/>	Station Number	File Name	Created	Election Name	Size	Download
<input type="checkbox"/>	1	Ballot Paper Refusal List	Dec 17, 2024, 4:01:00 PM	District	PDF: 18.04 KB	
<input type="checkbox"/>	1	Ballot Paper Refusal List	Dec 17, 2024, 4:01:00 PM	Parish	PDF: 18.03 KB	
<input type="checkbox"/>	1	Ballot Paper Refusal List	Dec 17, 2024, 4:00:59 PM		CSV: 152 Bytes	
<input type="checkbox"/>	1	BPA Report	Apr 18, 2024, 3:27:36 PM	District	PDF: 22.87 KB	
<input type="checkbox"/>	1	BPA Report	Apr 18, 2024, 3:27:36 PM	Parish	PDF: 22.74 KB	
<input type="checkbox"/>	1	Marked Proxy Register	Dec 17, 2024, 4:01:00 PM	District	CSV: 2.43 KB PDF: 21.76 KB	
<input type="checkbox"/>	1	Marked Proxy Register	Dec 17, 2024, 4:01:00 PM	Parish	CSV: 2.43 KB PDF: 21.76 KB	
<input type="checkbox"/>	1	Marked Register	Dec 17, 2024, 4:01:00 PM	District	CSV: 29.65 KB PDF: 85.74 KB	
<input type="checkbox"/>	1	Marked Register	Dec 17, 2024, 4:01:00 PM	Parish	CSV: 29.65 KB PDF: 85.78 KB	
<input type="checkbox"/>	1	Voter Identification Evaluation Form	Apr 18, 2024, 3:27:37 PM	District	PDF: 23.12 KB	

IMPORTANT: when you download ALL REPORTS it will include 'sealed reports' ones with a padlock, you will be asked if you are sure you want to proceed with the download. All downloads of sealed reports are recorded and a **Seal Audit Report** is generated.

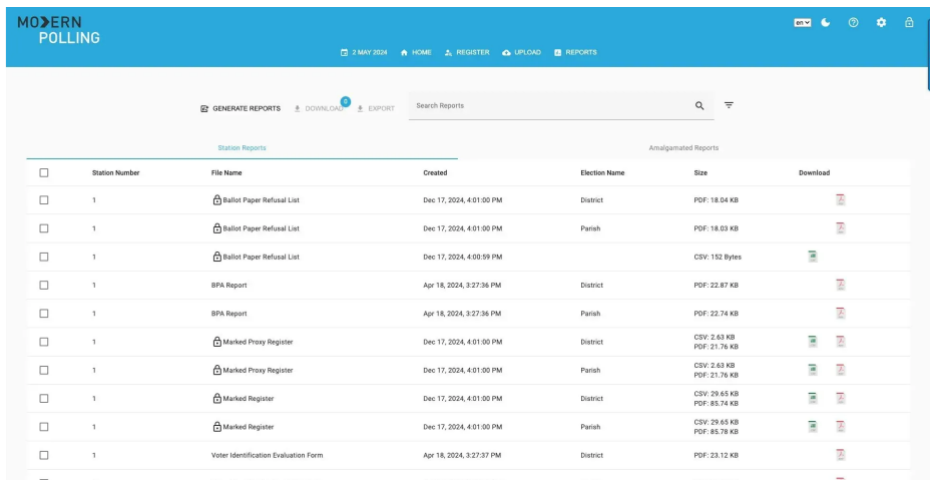


Note: When downloading all reports, they are downloaded as a zipped (compressed) file. To extract the zipped file into individual reports, you will need **WinRAR** or **7-Zip**. If you do not have WinRAR or 7-Zip, you will have to download the reports individually at polling station level.

When do Reports Expire on Modern Polling?

We recommend generating reports and exporting files at 35 working days post Close of Poll. Please contact your Project Lead to enable the 'EXPORT' function and guide you through the steps.

Note: When Exporting All reports, they are downloaded as a zipped (compressed) file. To extract the zipped file into individual reports, you will need WinRAR or 7-Zip.



The screenshot shows the 'MODERN POLLING' web application interface. The top navigation bar includes '3 MAY 2024', 'HOME', 'REGISTER', 'UPLOAD', and 'REPORTS'. Below the navigation bar, there are buttons for 'GENERATE REPORTS', 'DOWNLOAD', and 'EXPORT', along with a search bar labeled 'Search Reports'. The main content area displays a table of reports, categorized into 'Station Reports' and 'Amalgamated Reports'. The table has columns for 'Station Number', 'File Name', 'Created', 'Election Name', 'Size', and 'Download'. The data rows include various report types such as 'Ballot Paper Refusal List', 'BPA Report', 'Marked Proxy Register', 'Marked Register', and 'Voter Identification Evaluation Form'.

Station Number	File Name	Created	Election Name	Size	Download
1	Ballot Paper Refusal List	Dec 17, 2024, 4:01:00 PM	District	PDF: 18.04 KB	
1	Ballot Paper Refusal List	Dec 17, 2024, 4:01:00 PM	Parish	PDF: 18.03 KB	
1	Ballot Paper Refusal List	Dec 17, 2024, 4:00:59 PM		CSV: 152 Bytes	
1	BPA Report	Apr 18, 2024, 3:27:36 PM	District	PDF: 22.87 KB	
1	BPA Report	Apr 18, 2024, 3:27:36 PM	Parish	PDF: 22.74 KB	
1	Marked Proxy Register	Dec 17, 2024, 4:01:00 PM	District	CSV: 2.43 KB PDF: 21.76 KB	
1	Marked Proxy Register	Dec 17, 2024, 4:01:00 PM	Parish	CSV: 2.43 KB PDF: 21.76 KB	
1	Marked Register	Dec 17, 2024, 4:01:00 PM	District	CSV: 29.65 KB PDF: 85.74 KB	
1	Marked Register	Dec 17, 2024, 4:01:00 PM	Parish	CSV: 29.65 KB PDF: 85.78 KB	
1	Voter Identification Evaluation Form	Apr 18, 2024, 3:27:37 PM	District	PDF: 23.12 KB	

We appreciate your Feedback!



Post-election we will be sending out a **feedback form** to gather your election experience with Modern Polling. Your feedback is essential as we continually aim to improve our products and services.

iPad Collection



iPad Collection

Your iPad's will be collected **the week after** the election.

You, as the Election Manager, will be asked to complete and sign a similar checklist to sign off on equipment numbers being returned. The iPad's will be collected the week after the election. iPad delivery & collection details will be agreed upon nearer the time, with your Project Lead.

iPAD COLLECTION

1



LOG IN

Click on the **Modern Polling App** icon and log into the Modern Polling App.

2



CONFIRM POLLING STATION

Confirm the **Polling Station Details** AND the **Ballot Paper Range(s)**.

3



CONFIRM TOTAL ELECTORS

Tap on **Search Register** on the home screen, check all electors have loaded. ALSO check you can search for an elector AND check the number of Total Ballots, tap **View CNL**.

4



LOG OUT

Tap on the **Lock icon** on the top right of the screen, then tap **YES** on the 'Are you sure you want to log out?' dialog.

5



QUIT THE APP

You **MUST** quit the app after logging out. Press the '**home**' button on the iPad twice and **slide the Modern Polling App up** and off the screen.

Key Dates

Election: May 1st - Add me to your Calendar



Step 1: Implementation Meeting with Project Manager

3rd - 7th March.

[Add to Outlook Calendar](#)



Step 2: Election Manager Training

To be complete before validation upload.

[Add to Outlook Calendar](#)



Step 3: Poll Card Proofing

Reminder to upload Poll Card proofs to Modern Democracy for checking when ready from printer. February/March.

[Add to Outlook Calendar](#)



Step 4: Data Validation (check your data in Modern Polling)

We would highly recommend completing this, to give you the opportunity to upload the data and have it validated before the live election upload

[Add to Outlook Calendar](#)



Step 5: Initial (1st) Live Data Upload

From 2nd April.
At close of nominations.

[Add to Outlook Calendar](#)



Step 6: Ballot Paper Proofing

From 4th April.
After close of nominations.

[Add to Outlook Calendar](#)



Step 7: Polling Station Staff to complete Training Course

To be complete before 30th April.

[Add to Outlook Calendar](#)



Step 8: Final (2nd) Data Upload at Minus 5

To be complete 24/25th April.

At Minus 5.

[Add to Outlook Calendar](#)



Step 9: iPad Delivery

Delivery: 23rd to 25th April.

[Add to Outlook Calendar](#)



Step 10: iPad Distribution to POs

Distribute 28th to 30th April.

[Add to Outlook Calendar](#)



Step 11: Election Day

1st May.

[Add to Outlook Calendar](#)



Step 12: Post Election (iPad Collection, Report Generation & Feedback)

Collection: 7th May.

Feedback sessions from 7th to 9th May.

[Add to Outlook Calendar](#)

End of Section 14

Over to you (practice for Election Day) - please COMPLETE by 14th March

Overview of the Modern Polling App - Training Election

The Modern Polling App is designed with an intuitive interface to ensure ease of use. Polling Station Staff use the online training to get an understanding of the app, however, it is also important for you (and your Election Management team) to understand how to use the Modern Polling App for two reasons:

1. During the hands-on training session, you will be assisting them as they go through the 'training' scenarios on the iPad.

Note: the training election is dated '25th December 2025'

2. During the hands-on training session, you will be monitoring their activity on the app via your Modern Polling Portal Dashboard. At the end of each session you will be checking the reports generate correctly.

3. On election day, you are the first line of support for your polling station staff.

Click to watch the video:

https://www.youtube.com/watch?v=SKyB2_pbnQk

Click to watch the video:

https://youtu.be/ieqvU_x4k

Poll Clerk (PC)

The video above shows how to scan a poll card, find a voter using search and assign ballots to the voter.

Presiding Officer (PO)

The video above shows how to search for a voter when logged in as PO and how to submit the BPA.

Tick the below boxes, to confirm you understand how to do the following on the App:

Scan Poll Card

Find Voter (via Search Register)

Add Notes

Submit BPA

Overview of the Modern Polling Portal Dashboards

Tick to confirm you know how to do the following on the Portal:

The Modern Polling Portal is also designed with an intuitive interface to ensure ease of use. You (and your Election Management team) will use this during the hands-on training sessions and on election day to monitor all of your polling stations that are using the Modern Polling App, you will also use at close of poll to check your reports.

- Check Staff are logged in
- Check Votes Cast
- Check Turnout
- Check BPAs are submitted
- Check VIDEFs
- Generate Additional Reports
- Create Sealed Audit Report
- Export ALL Reports