

SETUP QUESTIONNAIRE & INSTRUCTIONS

ELECTION TIMELINE

1
week

TO ELECTION START: All documents and required information should be submitted a **minimum of 5 business days prior to the election start** date to ensure the election site launches on time.

2
days

TO ELECTION START: The election site will be provided to you typically 2 days prior (a minimum of 1 business day prior) to the election start for your review and testing. Any delay of document and information delivery by the client can affect the launch date. Please follow the testing procedures as outlined in the VM User Guide (a link to the guide is provided in your VM welcome email). It is **IMPERATIVE** that you clear out any test votes prior to the launch of the live election.

1
day

Send any changes or updates to Support@associationvoting.com for completion prior to the election launch and during business hours (9-5 eastern). **Changes sent after 4pm EST time will not be performed until the next business day.** Once changes are completed, you will be alerted by Support. **The Support team processes a single set of changes/updates to the initial set-up;** however, as VM admin you can make additional changes in the Voting Manager portal.

Silence is APPROVAL: If you have no changes or updates to provide, your election will remain unchanged and will launch at the election start date/time.

REQUIREMENTS FOR ELECTION LAUNCH QUESTIONNAIRE TO BE COMPLETED AND RETURNED TO AV

Please provide answers to the below questions so we may setup your election site properly

- 1 Election Site URL Acronym: for ex: American College of Emergency Physicians would enter ACEP
- 2 Voter Credentials for login: Select two credentials the user will use to log in to the election.
 - a. Last Name
 - b. Email Address
 - c. System Generated Password
 - d. Password
 - e. Member ID
 - f. Please Create a Unique ID For Me
 - g. Other: _____
 - h. Other: _____
- 3 Which Credential from above is unique to the voter: _____
Note: If the unique field value repeats for any voter in your upload file, the voter will be rejected.
- 4 Election **START** date _____ time _____ Time zone _____

- 5 Election **END** date _____ time _____ Time zone _____
- 6 Group Weighting: If your election has group or district specific voting, please provide the assigned weights for each group (**if the weights are NOT 1 vote per voter**):
- 7 Branding: Color Scheme. Please provide following color selections: [Link to HTML color codes \(3rd party\)](#)
 - a. Header Color (region behind the logo): _____
 - b. Primary Button Color (ex: #1aacd9): _____
 - c. Button Text Color (ex: white): _____
- 8 Election / Ballot Rules:
 - a. Write-ins Allowed: ___Yes ___No ____ (#) Write-ins allowed
 - b. Choose up to # ____ of Candidates per position.
 - c. Additional Voting Rules / Explanation:

DATA & FILES

PLEASE PROVIDE THE FOLLOWING ITEMS - ALL DATA SUBMITTED MUST BE FINAL. PLEASE DO NOT SEND ROUGH DRAFT DOCUMENTS OR PARTIAL VOTER LISTS.

- 1 Branding: Please send your logo for inclusion on the Voting Site.
Format: PNG, JPG, GIF. No larger than 1MB.
- 2 Voter List: The following fields are accepted but not all are required. Note 2 of these fields must represent the voter credentials used for the voter to login. Note 1 of the 2 credential fields must be unique to each voter (unique to each record in the excel provided). **Format: csv**

- d. First Name
- e. Last Name
- f. Member # / ID
- g. Email address
- h. Passcode / Password
- i. Property Number
- j. Company Name
- k. Zip Code
- l. Address
- m. Groups (if applicable)

Groups, if applicable, should be labeled in the csv file

Each column must be labeled.(ex: the name column should be titled "Name" and the Zip code column should be titled "Zip Code"

	A	B	C	D	E	F
1	First Name	Last Name	Ballot Number	Email	Organization Name	Groups
2	Casey	Edwards	1325543	casey@email.com	Results at Hand	Graphic Department

There should be **ONE** final voters list including headings and groups if applicable.

Note: The use of a date field (ex: birthdate) as a credential is not recommended in the CSV file. As the formatting can become garbled. If you must use a date please format as follows – mmddyyyy. Example of January 1st 2017 is 01012017.

- 3 Slate/Ballot instructions
- 4 Slate/Ballot
- 5 Candidate bios (optional): in word format, text file or electronic PDF. We will do our best to match the candidate bio format as provided. Candidate bio text is copied verbatim so ensure what you send us is what you want to see.
- 6 Candidate pics (optional): 100x100 png or jpg format. Our system will attempt to auto-size the picture to fit 100x100 pixels; however for optimal viewing please provide an image close to that. Images too large can be obscured on the ballot.
- 7 Bylaw / Proposition changes with language if applicable
- 8 Proxy language and Assignment Rules (Proxy service ONLY)

Setup service may require up to five business days for completion. **Once we receive your data, documents, and this completed questionnaire, we will setup your election site!** Please contact Support@associationvoting.com with any questions.

Thank You!
AV Support Team