

rVotes Access & How To Get Started

Instructions

Version: Updated 7/28/2011

As a result of the Saturday, July 23rd, Ohio Liberty Council leaders meeting in Columbus, we have received many requests for access to rVotes. Please follow these instructions to gain free county-wide precinct access to the rVotes capabilities.

rVotes Administration

Please note that by receiving access to rVotes, you become an administrator for your county-wide precinct group / committee. This means that you will be able to give other users access to rVotes for your county-wide precinct group / committee. You will determine the access rights for each user, some of whom can have the same administrative rights as you.

rVotes Training

Online training will be provided by rVotes on an ongoing basis. Once you request rVotes access and are approved, you will receive e-mail invites from rVotes for these training sessions. Simple instructions to get you started in rVotes are noted below. These instructions show you how to create a walking list, add users to your group / committee, and have users in your group / committee make phone calls to voters from their homes. In addition, Warren Edstrom and Peter Wolf will organize extensive, centralized Ohio rVotes training events in the very near future. They will also include limited rVotes training in their regional training events, which you can schedule with them as discussed at the Ohio Liberty Council leaders meeting last Saturday, July 23rd. Once users are logged into rVotes they can also get help from the [“Help” menu](#) on the top right of the rVotes website.

rVotes Capabilities

Please recognize that rVotes has enormous capabilities. Further training on these advanced features will be provided in the future. It’s important to just get started!

rVotes Access Request

Please e-mail the following information to Warren Edstrom (warren@thevoicesofamerica.org) and copy Peter Wolf (pete@thevoicesofamerica.org). Warren will forward the information in a batch Excel sheet to rVotes. They, in turn, will provide you with the free county-wide precinct level access and e-mail you your **User Name** and initial **Password**.

It is important that we use this sign-up process to give you free county-wide precinct access to rVotes in Ohio. This assures that only those abiding to the core principles of limited government, free markets, and individual liberties are given access. Warren Edstrom will perform the appropriate due diligence. Neither Warren Edstrom, nor Peter Wolf, will have any control or access to the respective rVotes county groups / committees that you create once you have access.

Group /Committee Name <i>(Create a name you want to use.)</i>	
User Level – see below	Administrative Access
Your Ohio County	
Your Voting Precinct	
First Name	
Middle Initial	
Last Name	
Primary Phone Number	
e-Mail Address	
Member of Which Organization	
Organization Leaders Name	
Organization Leader’s Phone #	

User Levels: A=Group /Committee Admin - *able to add new users, create scripts / surveys, etc.*
U=Group / Committee User –*abilities vary based on permissions given by Admin.*

rVotes Log-In – once you receive your User Name and initial Password from rVotes

Go to - <http://www.ohiorvotes.com> and enter your assigned User Name and Password.



Once you log in, you may receive important messages from rVotes announcing new online training sessions.

The first time a new user logs into rVotes, they will see a screen that requires them to provide contact information and, importantly, the opportunity to change the password which the Admin assigned. A new user will then see the End User License Agreement. New users must agree to all terms by checking each individual box.

Walking List Creation

To start, click on “Main Menu” tab to start.

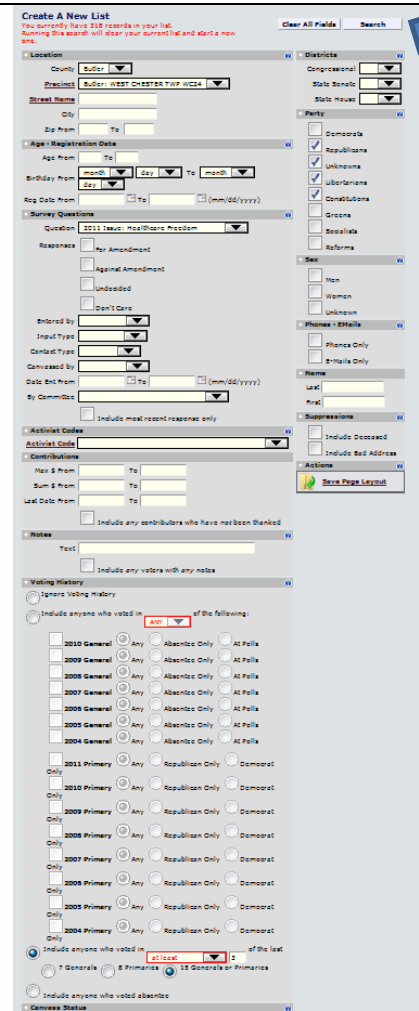
Click on “Create A New List - Build, edit, and print a list of voters.”

Select the “County” where you reside.
Once the selection box pops up, select the “Precinct” in which you are interested.

Then make your selections, based on whom you would like to contact. Key choices are:

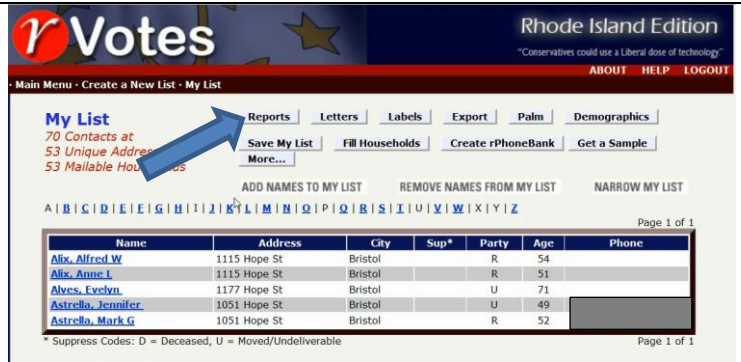
- **Party Affiliation**
- **Voting History**
- **Survey Question** –you will see sample survey scripts from the drop-down menu. In the future, we will provide instructions for Admins to create their own, customized survey scripts.

Then click on “Search” button to view results.



Next, you will see publicly available information from Voter Records, based on your selected “Search” criteria.

Click on the “**Reports**” button.

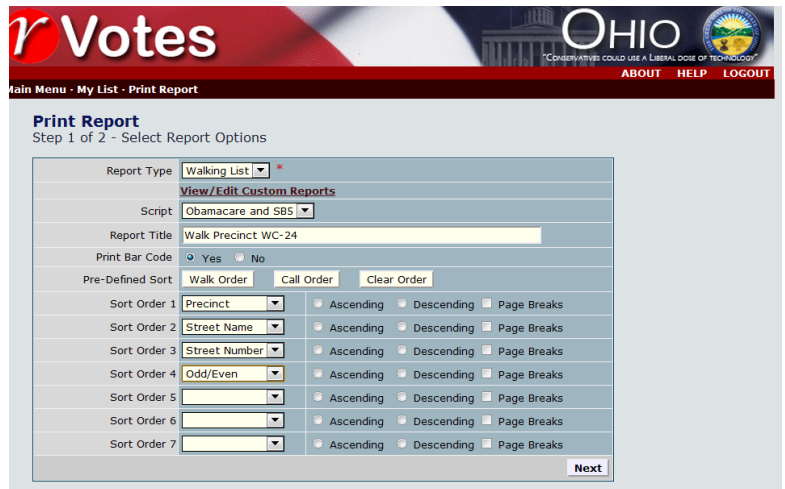


From the “**Report Type**” select “**Walking List**”

Select a “**Script**” –you will see sample survey scripts from the drop-down menu. In the future, we will provide instructions for Admins to create their own customized survey scripts.

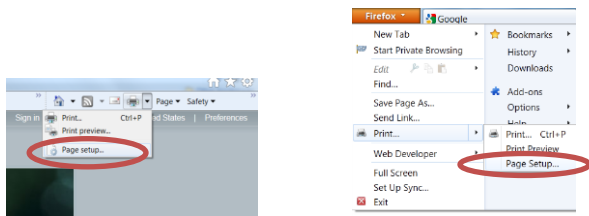
Create and enter a “**Title**” for the Walk List Report

Then decide the “**Walk Order**” preferences by making selections from the dropdown menus.



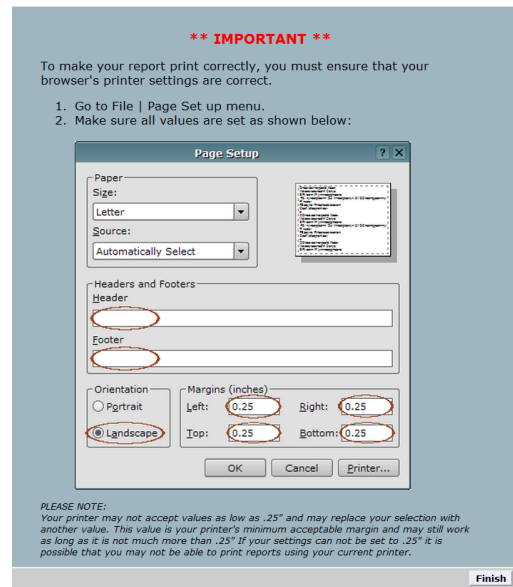
For your report to print correctly, you must ensure that your browser's printer settings are correct.

1. Go to the **Page Setup** menu for Printing – see below for Internet Explorer & Firefox
2. Make sure all values are set as shown on the instruction template to the right.



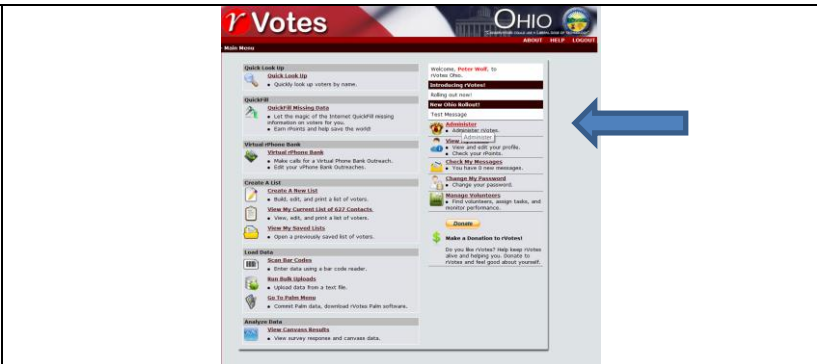
Click on “**Finish**” button to obtain your Walking List which can then be printed.

The Bar Codes identify every individual voter and can be used later in combination with survey responses from your precinct walk to enter data with an inexpensive Bar Code Scanner (*Code 39 Scanner*).



Add Users to Your County-wide Group / Committee – requires Admin access for your group/ committee

From the “Main Menu” section click on “Administer”



Click on “Administer Users”



Click on “Add User”

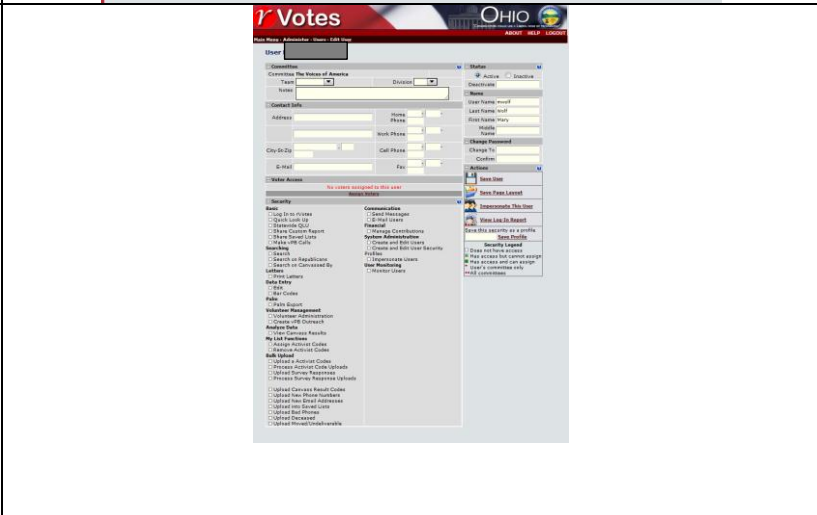


The interface to the right will then open up.

Fill in as much of the information for this user as is desirable. **You, as the Admin., will have to create a User Name and Password for each new user.**

At a minimum, in the “Security” section check the following:

- “Log In to rVotes”
- “Quick Look Up”
- “Make vPB Calls” (vPB=Virtual Phone Bank)



Provide the new users with the assigned User Name and Password. The new user will then be able to access rVotes.

The first time the new user logs into rVotes, they will see the screen on the right which requires them to provide contact information and, importantly, **change the password** which the Admin assigned.

The new user will then see the End User License Agreement. They must agree to all terms by checking each individual box.



Virtual Phone Calling List Creation – you must have Admin access to create this list and to assign users in your group / committee access to the list

Follow instructions for **Walking List Creation** from “Main Menu” through “Search”.

Then, instead of selecting “Reports”, select “Create RPhoneBank”.

The screenshot shows the 'rVotes Rhode Island Edition' interface. The main menu includes 'Create a New List - My List'. Below this, there are several buttons: 'Reports', 'Letters', 'Labels', 'Export', 'Palm', 'Demographics', 'Save My List', 'Fill Households', 'Create rPhoneBank', and 'Sample'. A blue arrow points to the 'Create rPhoneBank' button. Below the buttons is a table with columns: Name, Address, City, Sup*, Party, Age, and Phone. The table contains several rows of contact information.

Name	Address	City	Sup*	Party	Age	Phone
Alex, Alfred W	1115 Hope St	Bristol		R	54	
Alex, James L	1115 Hope St	Bristol		R	51	
Alex, Fredyn	1177 Hope St	Bristol		U	71	
Astell, Jennifer	1051 Hope St	Bristol		U	49	
Astell, Mark G	1051 Hope St	Bristol		R	52	401-396-9309

Enter the following information into the rPhoneBank fields.

- **Name** – create a name for the rPhoneBank list
- **Description** – describe the list
- **Survey Question** –you will see sample survey scripts from the drop-down menu. In the future, we will provide instructions for Admins to create their own customized survey scripts.

Then click the “Save” icon to make the “User Access” window pop-up.

Select a user from the right column of previously added users. Click the “Add” button to add them to the left “Users with Access” column.

Click “Save” icon again & you are done.

The screenshot shows the 'Saved rPhoneBank Outreach: WC-24 Phone List' form. The form has fields for Name, Description, Survey, and Folder. Below the form is a 'User Access' section with two columns: 'Users with Access' and 'Users without Access'. A blue arrow points to the 'Add' button between these columns.

When the user from your county-wide group / committee logs into rVotes, they will see the screen on the right.

Have them select the “Virtual rPhone Bank” to access the saved list created by the Admin for this group.

The screenshot shows the user's main menu. The 'Virtual rPhone Bank' section is highlighted with a blue arrow. The menu includes options like 'Quick Look Up', 'QuickFill Missing Data', 'View My Saved Lists', 'View My Profile', 'Check My Messages', and 'Change My Password'.

The user then selects the saved phone list, named in this example “WC-24 Phone List”

The screenshot shows the 'My rPhoneBank Outreaches' table. A blue arrow points to the 'WC-24 Phone List' row. The table has columns: vPhoneBank Outreach Name, Size, Owner, Users, Date, Outreach Details, and Tools.

vPhoneBank Outreach Name	Size	Owner	Users	Date	Outreach Details	Tools
WC-24 Phone List			2	7/27/2011	Access Not Available	Edit Delete

As soon as the phone list is selected, a voter's name, address, phone number, script, and survey pops up.

Call the number manually using your home or cell phone and enter the responses into the form on your computer. Once done, click on the **“Save & Get Next”** button to call the next voter. The data will be saved and linked to the data of the voter you called.

Note that you can **tag voters with “Activist Codes”** at the bottom of the form, such as “Volunteer”, join “Mailing List”, or “Want to contribute”. This is valuable information! For example, you can later search your voter data base for those who “volunteered” to help with door-to-door canvassing, sending out mailers, or fundraising. Note that a “User” of rVotes can also be a “Volunteer”, but a “Volunteer” is not automatically a “User” of rVotes, unless you gave them access to the rVotes system.

If you have a [free Skype account](#) and Skype is running on your computer, you can just click on the voter's phone number to make the call from your computer. You may need the [browser Skype plugin](#). Installation may take quite some time, so be patient.

rVotes may, as warranted at a future time, also provide connections to third-party phone system providers. The Application Programming Interface (API) software capability exists in rVotes to seamlessly exchange data with any third-party phone system.

In all of the above cases, since the caller initiates the call, no “dead time” will occur when the voter answers the phone, as is typically the case with computerized phone systems. When voters hear “dead time”, they are tipped off that the call is from a computerized phone bank and the call may not be as effective in eliciting candid voter responses.

The screenshot shows the rVotes web application interface. At the top, there is a navigation bar with the rVotes logo, the Ohio state logo, and a slogan: "CONSTITUTIONALISM COULD USE A LIBERAL DOSE OF TECHNOLOGY". Below the navigation bar, there is a status bar with the following information: "Main Menu - rPhone Bank Outreaches - rPhone Bank", "Canvass: Obamacare and SSB3 - WPB Name: WPC-04-Phone List", "Fish bowl: 627 Locks: 1 Total Completed: 0 You called: 0 Your %: 0% Total Calls Remaining: 627 [Refresh]".

The main content area is a survey form for a voter. The form is titled "Voter contact information blocked to protect privacy." and has a "Save & Get Next" button. The form contains the following text: "Hello, _____? (confirm name). My name is _____, I am a volunteer with _____ and I'd like to conduct a quick, two question survey about two issues that will be on the November ballot. This should take less than a minute. Do you have a moment? [If not, thank them and go to next contact. If yes, continue.] Last year Congress passed the Patient Protection and Affordable Care Act, frequently referred to as "Obamacare". The Healthcare Freedom Amendment has been placed on the ballot to exempt Ohio citizens from Obamacare. 1) If the election were held today, how do you stand on the Healthcare Freedom Amendment? (FOR Amendment?, AGAINST Amendment?, Undecided?, DON'T CARE.) This year the Ohio's General Assembly passed a collective bargaining reform bill frequently referred to as Senate Bill 5. A referendum has been placed on the ballot to repeal Senate Bill 5. 2) If the election were held today, would you be for repealing Senate Bill 5, against repealing Senate Bill 5, or are you undecided? (FOR repeal?, AGAINST repeal?, Undecided, Don't care)".

Below the survey text, there is a section titled "Call Results (if not completed):" with radio button options: Completed (selected), Busy, Call Back, Deceased, Not Home, and Refused.

There are two numbered questions with radio button options:

1) If the election were held today, would you stand on the Healthcare Freedom Amendment?
 For Amendment
 Against Amendment
 Undecided
 Don't Care

2) Are you FOR repealing Senate Bill 5 (SB5) in Ohio?
 For Repealing
 Against repealing
 Undecided
 Don't Care

At the bottom of the form, there is a section titled "Activist Codes:" with checkboxes for: Mailing List, Volunteer, Want to contribute, and Yard Sign.

At the very bottom of the form, there is a note: "That's all the questions I have. Thank you very much for your time. [Checkboxes may be used to record if people volunteer the information that they would like to help as a volunteer, make a contribution, put up a yard sign, or get on mailing list. This is only recorded for those who indicate support for our side of the issues.]"