

elect



Manual for Clerks

Wisconsin Elections Commission

February 2024

ElectEd Clerks Manual

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1. Introduction: Why ElectEd?

On January 11, 2024, the Wisconsin Elections Commission (WEC) launched [ElectEd](#), its new learning management system. This system replaces the previous one, The Learning Center (TLC), and introduces a series of features that improve the learning experience for clerks and poll workers. On ElectEd, clerks are able to:

- Add, manage, and remove poll worker accounts
- View and track their own and their poll workers' training
- Add in-person and live virtual training events they will be offering to the calendar
- Track how many hours they and their poll workers have accrued
- See and register for upcoming training events

Additionally, ElectEd allows WEC staff to create more interactive and agile presentations which facilitate the transmission of electoral knowledge. The previous trainings created under TLC have also been transferred to ElectEd.

This manual serves two purposes. First, it acts as an introduction for clerks who are new to ElectEd and want to explore its features. Second, it is intended as a troubleshooting reference for clerks looking to solve ElectEd-related issues for them or their poll workers.

2. Your ElectEd Account

In this section, you will learn how to enter ElectEd for the first time, how to navigate the basic pages of the website, and will understand the differentiated access levels of clerks and poll workers.

Clerks can log in to ElectEd in two ways. The WEC provides clerks that are not WisVote users with a username and a single-use password. Clerks that are WisVote users, though, must log in using the same credentials they use for WisVote.

a. Logging in for the First Time

If you are not a WisVote user, and you have [requested access to ElectEd](#) you will receive an email from ElectEd inviting you to activate your account. Be sure to check your spam and junk folders because it is an automated message. This email will include a clickable link to log you in and change your password. The email will also include your username.

From: ElectEd <noreply@electionsupport.wi.gov>
Subject: An administrator or clerk created an account for you at ElectEd WEC's learning site
Date: February 5, 2024 at 4:27:54 PM CST
To: golilith@hotmail.com
Reply-To: noreply@electionsupport.wi.gov

Jim Pollworker (WEC test user),

A site administrator or your municipal clerk has created an account for you at ElectEd, WEC's new learning platform. You may now log in by clicking this link or copying and pasting it into your browser:

<https://electiontraining.wi.gov/user/reset/45936/1707172070/x4y6ZQ7FJ70ugnvIZBNWFZMGQfjlQby9ybRaRnL5sU>

This link can only be used once to log in and will lead you to a page where you can set your password.

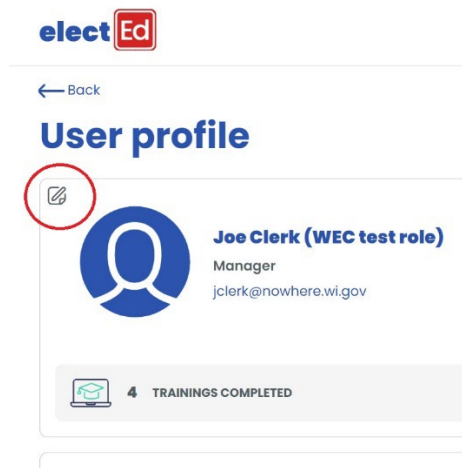
After setting your password, you will be able to log in at <https://electiontraining.wi.gov/user> in the future using:

username: golilith
password: Your password

-- ElectEd team

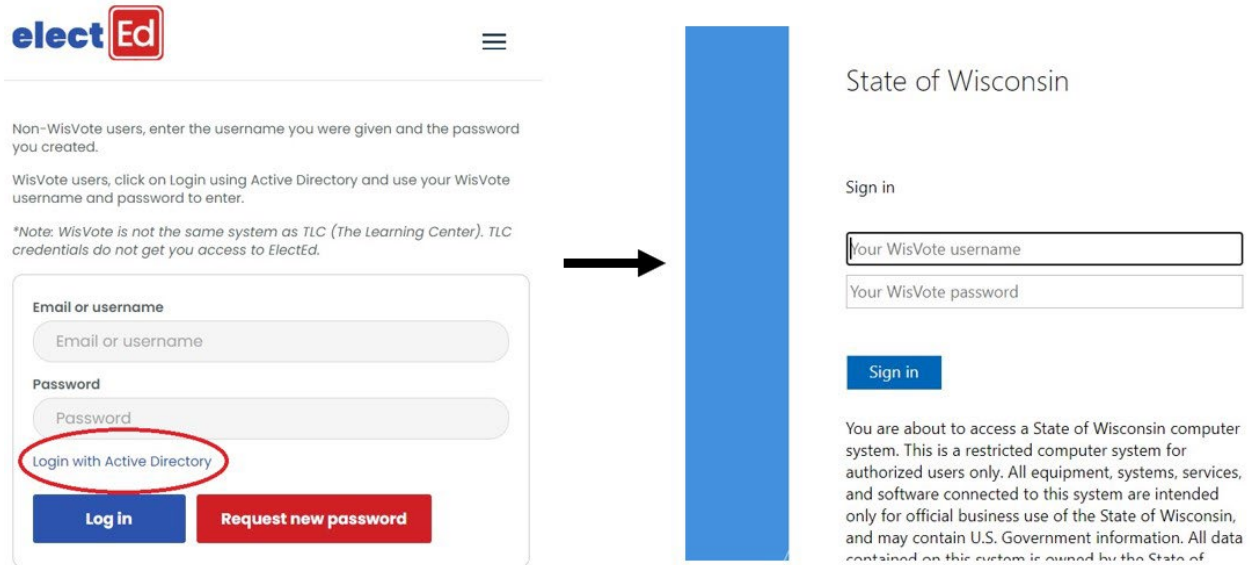
i. Changing Your Password

To change your password, click on your name on the upper right corner of the screen. Then, click on the **“pen and paper”** button, which will allow you to edit your account details. Scroll down to the password fields and type in your preferred secure password. Please remember to follow strong password recommendations, such as including upper and lowercase letters, numbers, and symbols. Also, we recommend that you change your password every 60 days.



b. Logging in as a WisVote User

If you are a WisVote user, you must access ElectEd using your WisVote credentials. To do so, go to <https://electiontraining.wi.gov/user/login> and click on **Login with Active Directory**. Then, type your WisVote username and your WisVote password. This will take you to the landing page of ElectEd. As a WisVote user, you will not be able to change your password on ElectEd. If you cannot remember your WisVote password, use the WisVote mechanism for recovering it. Please avoid clicking on the **Request new password** button on the ElectEd login page if you are a WisVote user.



c. The Profile and Home Pages

You can access your Profile page by clicking on your own name on the upper right corner of the screen. The top section of this page shows you, at a glance, your basic information, such as your name, email, credentials, date of first access to ElectEd, as well as how many trainings you have finished and, importantly, the number of training hours you have completed. At the bottom of the page, you can also see a list of all the trainings you have enrolled in, your progress in those trainings, and whether you have completed them. By clicking **Details**, you will be able to see your progress in more detail, including your progress on individual modules within trainings. This list, however, does not link directly to the trainings themselves, though you can find those on the Home page (see below.)

User profile





Joe Clerk (WEC test role)
Manager
jclerk@nowhere.wi.gov
Date joined Wednesday, November 29, 2023
Last access Wednesday, February 21, 2024
Member for 2 months 3 weeks

**2 CONNECTIONS**
Manage connections


**4 TRAININGS COMPLETED**

**1.00** **TRAINING HOURS COMPLETED**
2024 - 2025

By clicking on the **“pen and paper”** button on the upper left corner of your profile, you can go to the Edit Profile page, on which you can change your basic information, such as your name, email, and password. You can also add a profile picture that will be visible to other users.

You can access the Home page by clicking on **Home** at the top of any ElectEd screen. You can think of the Home page as the main page on any social media site. On the left you have a smaller version of the top of the Profile page, including the “pen and paper” button that allows you to change your information. Below that, you will see a list of your active trainings and then a list of upcoming events. On the right of the screen is the announcements section of the Home page, where you will be able to read communications from WEC staff regarding ElectEd. As in a social media platform, you can pin messages you deem relevant, so they stay at the top of your feed.

Home



Joe Clerk (WEC test role)

Manager

Trends

Last 7 days

Training(s) completed -->

Current training(s) 1+1

WEC Admin *pinned post*

Monday, February 12, 2024

When adding an event to the calendar, remember to check the box to "Publish only to your municipality" if you don't want everyone in the state to see it, be able to register, and/or attend.

And when the event is over, make sure the list of registrants matches your attendance list before marking it complete to give attendees their credit.

8

Like

WEC Admin *pinned post*

Tuesday, February 13, 2024

WEC staff cannot troubleshoot poll worker accounts. Please let them know to contact you, their clerk if they are having issues.

3

Like

2 CONNECTIONS

Manage connections

WEC Admin

Monday, February 19, 2024

you are up to date

By clicking on **Manage your dashboard**, you will have the option of rearranging all the sections of the home page to a layout of your preference. You can always set it back to the default layout.

d. Roles and Privileges for Clerks and Poll Workers

Clerks, their staff, and poll workers have different levels of access on ElectEd:

- Clerk – County and Municipal clerks
 - Can add and manage poll worker accounts
 - View poll worker training
 - Assign poll workers to catalog trainings

- Set up and manage training events on the calendar
- Can log in using "Login with Active Directory" if they are a WisVote user
- Has access to Management for user accounts and Training Hours Report
- Can add offline training hours for themselves or their poll workers. Clerk training shows up on WEC training hours report view
- Clerk Staff – deputies and other clerk staff that work on elections
 - Can add and manage poll worker accounts
 - View poll worker training
 - Assign poll workers to trainings
 - Set up and manage training events on the calendar
 - Can log in with SSO if WisVote user
 - Has access to Management for user accounts and training hour
 - Can add offline training hours for themselves or their poll workers.
 - Training shows up on municipality's training hours report
- Poll workers – chiefs and election inspectors who do/will not have WisVote access
 - Can see/take only non-WisVote and non-clerk training in the catalog
 - Can register for calendar events Does not have access to Management
 - Cannot add offline training hours
 - Cannot create any events or content

3. Taking Trainings

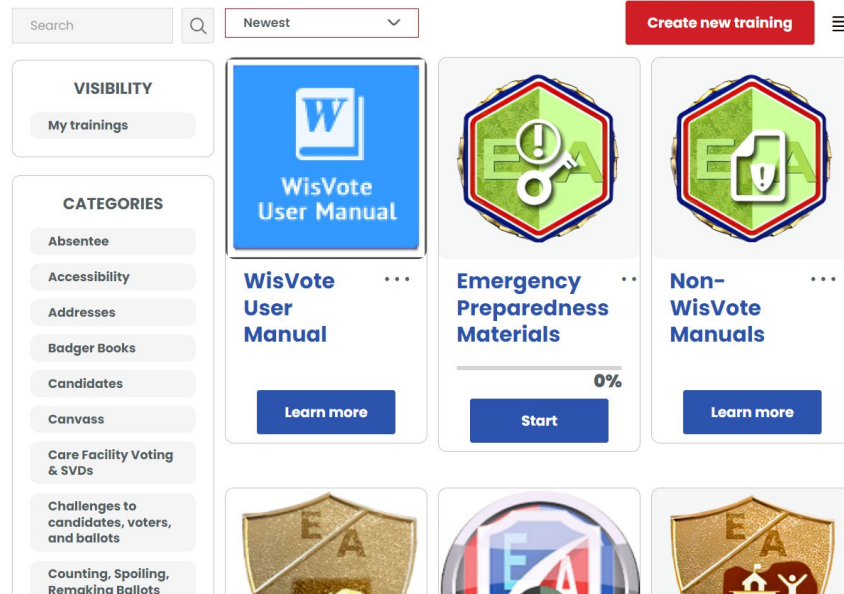
In this section, you will become familiar with the ElectEd's training catalog and will learn how to enroll in trainings. You will also learn how to interact with the content, how to review your progress, and how to add offline training hours.

a. The Catalog Page

By clicking on the **Catalog** button at the top of every ElectEd page, you can access a list of all the trainings offered on the WEC's learning platform. When you click on any of the training tiles you will be taken to that training's main page, from which you can learn more about it, enroll, or assign it to other users, including your poll workers.

On the left of the Catalog page there is a series of filters that will help you narrow down the list of trainings. You can select to view only the trainings you are enrolled in ("My trainings"), trainings of a specific length ("Duration") or trainings on different stages of completion ("Status"). You can also filter by using a comprehensive list of topics ("Categories"). Whatever you choose, make sure to scroll all the way down until you find the **Apply** button that you will need to click on to activate the filters.

Training catalog



b. Enrolling in Trainings

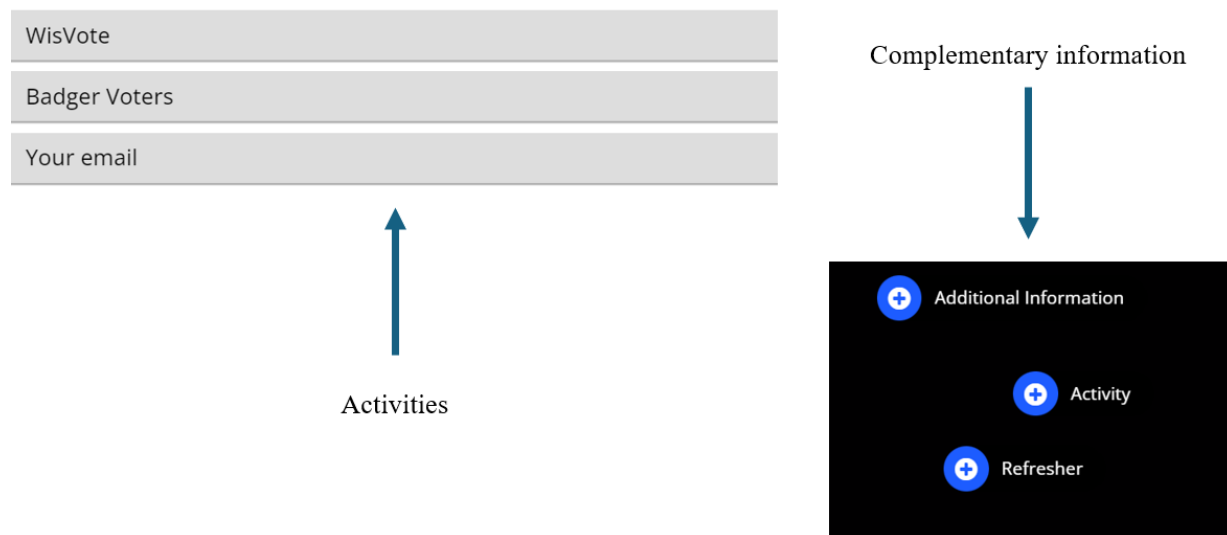
Enrolling in a training is straightforward. From the catalog, click on the tile for any training, which will take you to that training's landing page. Click on **Enroll** and, when prompted, on Join training. Once you have enrolled, you can start the training at any time. Enrolling in a training is a necessary step when trying to assign that training to poll workers. (See section Assigning training to poll workers.)

c. How to Use Interactives, Documents, and Other Elements

Once you have enrolled in a training, you just need to click on **Start** and follow the instructions until you complete the training. Most of the trainings currently on ElectEd consist of interactive videos. That is, videos in which prompts pop up from time to time for participants to complete activities like multiple choice or true/false questions, fill in the blanks, or interactive flashcards. Additionally, videos may show icons that, when

clicked on, take the participant to supplementary information. You must complete these activities in order to complete a training.

Your ElectEd credentials may be synchronized with what other credentials?



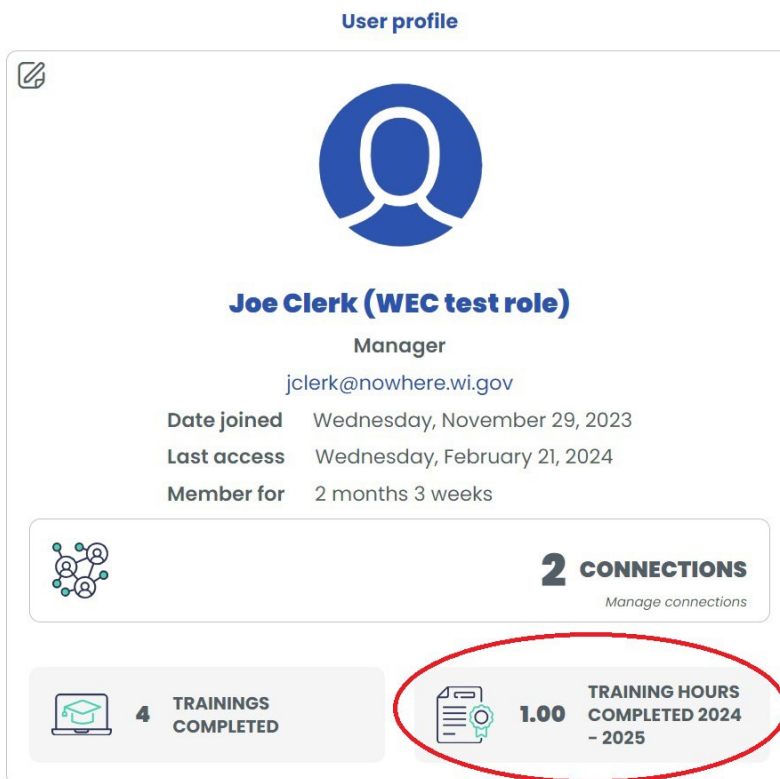
Starting a training also gives you access to additional resources, including manuals and slides. You will find these resources on the right column of the trainings you are enrolled in. Please note that a small number of trainings, such as “Non-Wisvote Manuals,” were created as manual repositories for clerks to easily access those materials. By design, these trainings do not include any other learning activities and no time credit will be recorded for entering those trainings.

d. How to View Your Progress

You can view your own training progress by going to your profile page, which can be accessed by clicking on your name on the top right corner of any ElectEd page. You will be able to see a list of all the trainings you are enrolled in as well as the percentage of

each training you have completed. More importantly, you will be able to see at the top of your Profile or Home pages the number of training hours you have completed.

User profile



Joe Clerk (WEC test role)
Manager
jclerk@nowhere.wi.gov

Date joined Wednesday, November 29, 2023
Last access Wednesday, February 21, 2024
Member for 2 months 3 weeks

4 TRAININGS COMPLETED

2 CONNECTIONS
Manage connections

1.00 TRAINING HOURS COMPLETED 2024 - 2025

Note: If you hit the Restart training button, that training's progress will go back to zero and you will have to go through every module again if you are interested in a particular piece of information. However, restarting a training *does not* impact your overall training hours in any way.

e. Offline Training Hours

Besides participating in online training, ElectEd also allows you to record and view training hours that you have taken in person. To access this function, first click on the **Management** button on the upper right of any ElectEd screen. This will display a list of options on a blue background. Then click on **Training Hours Report**, which will take

you to a new page. On this page, you can view any hours you and your poll workers have completed within a time frame by adding the start and end dates and clicking on **Filter**.

Whenever possible, you should use online events for training, instead of adding them as offline. However, if there was an election training attended that occurred in person and was not recorded in the system (for instance, at a clerk conference or district meeting), those hours can be added by clicking on **Create new offline training hours** and filling in the corresponding fields. If you are creating the training for yourself, add your name in the user field. If you are creating it for a poll worker, add their name. Then click Save to submit.

The screenshot shows the 'electEd' logo in the top left and a hamburger menu icon in the top right. The main heading is 'Create Offline Training'. The form contains the following fields:

- Title:** A text input field with the value 'My Training'.
- Description:** A text area with the value 'A training example'. Below the text area is a placeholder text: 'A short description of the offline training completed.'
- User:** A dropdown menu with 'jane' selected. Below the dropdown is a red button labeled 'Jane Pollworker (WEC test user) - TOWN OF ALBION - DANE COUNTY (101)'.
- Hours:** A text input field with the value '2'. Below the field is a placeholder text: 'The amount of hours that should be applied to the given user.'

At the bottom, there are two tabs: 'Revision information' (which is active) and 'URL alias'.

Once the hours are submitted, you will be directed back to your home page. If the hours were submitted by the clerk for one of their poll workers, the hours will appear in the Training Hours Report right away because they are already approved. Clerk hours, however, will not appear on the Training Hours Report until WEC staff approves them.

4. Management

One of the most important features of ElectEd is clerks' ability to manage the training of poll workers in their municipality. In this section, you will learn how to add poll workers to the system, how to assign trainings to them, as well as how to create new online or offline events.

a. Poll workers

It is the responsibility of municipal clerks to create user accounts for their election inspectors and chief election inspectors, as well as to keep track of their training progress. WEC staff, on the other hand, is in charge of the accounts for municipal clerks and their staff.

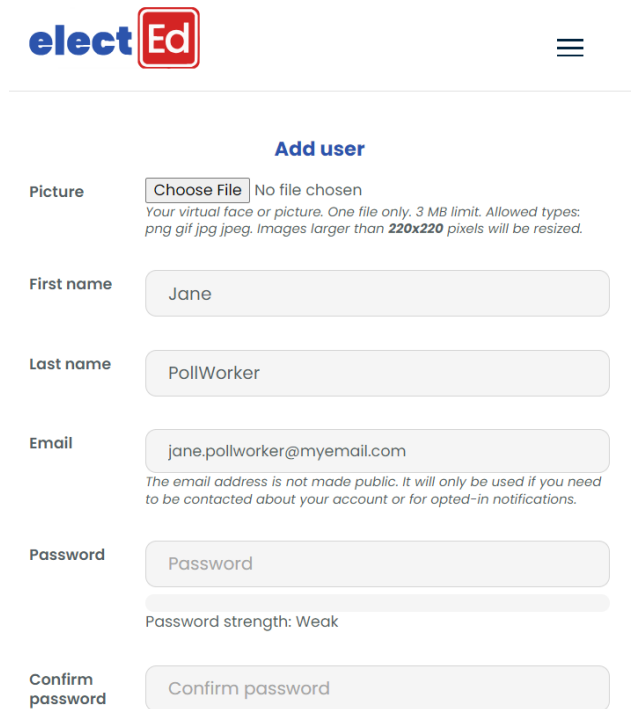
Note that municipal clerks are in no way required to use ElectEd for their poll workers! It is entirely optional and clerks may track their poll workers' training and hours elsewhere.

Clerks and clerk staff accounts include a **Management** button located on the top right corner of an ElectEd screen that is not visible to other users (i.e. poll workers) and allows them to oversee their municipality's accounts.

i. Creating New Poll Worker Profiles

To add a new user profile on ElectEd, first click on **Management** and then on **Users**. This will take you to a screen that lists all the users in your municipality. Next, click on **Add user**. Then, fill in all the required fields, such as name, email address, and password. The

password should be a generic one, such as "Password1," because the new users will have to change the first time they visit ElectEd.



The screenshot shows the 'Add user' form on the ElectEd website. At the top left is the 'electEd' logo, and at the top right is a hamburger menu icon. The form is titled 'Add user' in blue. It contains the following fields:

- Picture:** A 'Choose File' button with the text 'No file chosen' next to it. Below the button is a note: 'Your virtual face or picture. One file only. 3 MB limit. Allowed types: png gif jpg jpeg. Images larger than 220x220 pixels will be resized.'
- First name:** A text input field containing the name 'Jane'.
- Last name:** A text input field containing the name 'PollWorker'.
- Email:** A text input field containing the email 'jane.pollworker@myemail.com'. Below the field is a note: 'The email address is not made public. It will only be used if you need to be contacted about your account or for opted-in notifications.'
- Password:** A text input field containing the word 'Password'. Below the field is a password strength indicator showing a single bar and the text 'Password strength: Weak'.
- Confirm password:** A text input field containing the text 'Confirm password'.

When creating an account, make sure to use an active, unique email address, because otherwise users will not be notified of their account and will not be able to access the website.

Before clicking Create new account, make sure that:

- Status is set to Active.
- You have selected the correct county *and* municipality from the drop-down menus.
- The County clerk option is *not* selected.
- Notify user of account is selected.

After reviewing the information, click on **Create new account**. The new user will receive an email that includes a link to ElectEd, their username, and the temporary password you created for them.

If a poll worker loses the email with their ElectEd information, *you cannot generate that email again*. Instead, you must create a new password for the poll worker and send them this information in an email. First, find the poll worker's profile by clicking on **Management** and then **Users**. This will display a list of the users in your municipality. Find the poll worker and click on their name. Next, click on the **"Pen and Paper"** icon to edit that user's profile. Type in a new temporary password of your choosing and click **Save**. Then, write an email to the poll worker that includes their username (in this case, their email address), the password you created, and a reminder that they should change the temporary password to one of their choosing.

ii. Assigning Training to Poll Workers

You can assign any of the trainings available on the ElectEd catalog that you think are pertinent to your staff or poll workers. First, find the training you are interested in assigning and click on its tile. Then, click on **Enroll**. While you do not have to complete the training yourself, you will not be able to assign a training unless you are enrolled in it. Once you have enrolled, you will be directed to the training's page. Click then on the three horizontal dots on the upper right corner of the training's description, which will display a list of options. Click on **Add members** to see a list of your municipality's members. You can then click on a name to add them to the training. You can add several users at once by holding the Ctrl key while clicking on their names. You need to write a short note explaining why you want them to take this training and sign it. If you want the user to be able to access the training from the message, copy the URL for the

training and paste it into the message as well. After you have added all the users you want, make sure **Notify user** is selected and click on **Send invitation**.

Note: If you do not see a user you know exists on the list to add them to a training, it is because that user is already enrolled in the training.

To remove a user from a training, click Show instead of the blue Add Member button and click the trash can next to the user you wish to remove.

iii. **Tracking Poll Workers' Progress**

You can easily verify the amount of training a user in your municipality has completed. Click **Management** and then **Users** to see a list of your poll workers and your office staff. From there you can scroll down until you find the person you are looking for, or you can type part of their name or email on the search bar at the top. Click then on the name. This will take you to that user's page, which is full of information about them, such as their level of access, when they joined ElectED, and when they last accessed the platform. If you scroll down, you can see how many trainings they have completed, how many hours they have spent on the platform, and a list of all the trainings they have enrolled in.

Under some circumstances, you may want to delete a user's profile. For example, if you know for certain that someone will no longer serve as a poll worker. Do not delete a poll worker account if there is even a small possibility they will come back, as you will want a record of their training. To delete an account, first click on the user's name. Once you are on their profile, click on the **"pen and paper"** button to the left of their name. This will allow you to edit their profile. All the way to the bottom you will find the **Cancel account** button. Clicking it will display four options:

- Disable the account and keep its content and groups. Choose this option if the user is clerk staff and is simply taking a temporary leave.
- Disable the account and unpublish its content. Choose this option for poll workers who may return or are simply moving to another municipality.
- Delete the account and make its content belong to the Anonymous user. This action cannot be undone. It does not apply to poll workers as they are unable to create content. Use this option for clerk staff who are permanently leaving the municipality but who created training events and/or training content that need to remain in the system.
- Delete the account, its content and groups. This can be used for poll workers who will not be returning or are not moving to another municipality to work.

b. Events

The Calendar function on ElectEd is a useful tool for WEC staff and clerks to announce and promote events both online and offline.

i. The Calendar Page

To access the full calendar, simply click on the corresponding button at the top of the screen. This will show you all upcoming events. You can also filter for type of event, for specific time frame, or for events you created. You will also see an abbreviated version of the calendar on your Home page.

ii. How to Add and Manage Events

Clerks can create in-person training events on the ElectEd calendar. To do this, first click on **Calendar** on the navigation bar at the top of the screen. This will show you all upcoming events. In the upper right corner of the screen, click on the button **Create new event**, which will take you to a new page titled Create event. Fill in the required fields, such as the title of the event, the date in which it will take place, and the event's capacity. You can also include a short description of the event. From the Attendees field you can add any users that should be invited to the event. Change the status to Closed when you are no longer accepting registrations and Completed after the event has ended and you have verified the physical attendance list against the list of registrants in the system. You can unregister someone by checking the box next to their name or they may do so themselves. Click **Save** to generate the new event.

Note: make sure to click on **Publish only to your municipality** or the training will show up for every ElectEd user in the state. When county clerks click on Publish only to our municipality, every municipality in their county can see it. If you wish to limit the training to people in a certain area or with certain roles (clerks only, chief inspectors only, etc.), you will need to put that information in the description.