VOTE.DIRECT

USER GUIDE · OCTOBER 2026 EDITION

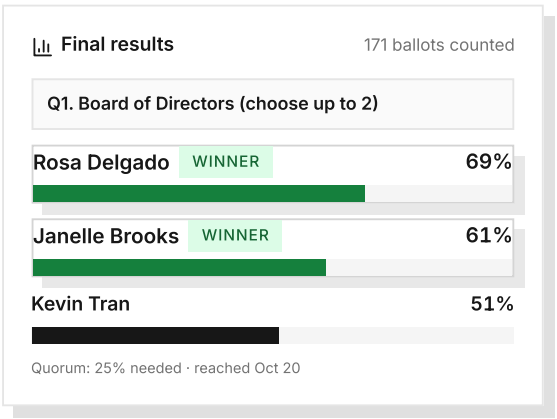
Run your election on vote.direct

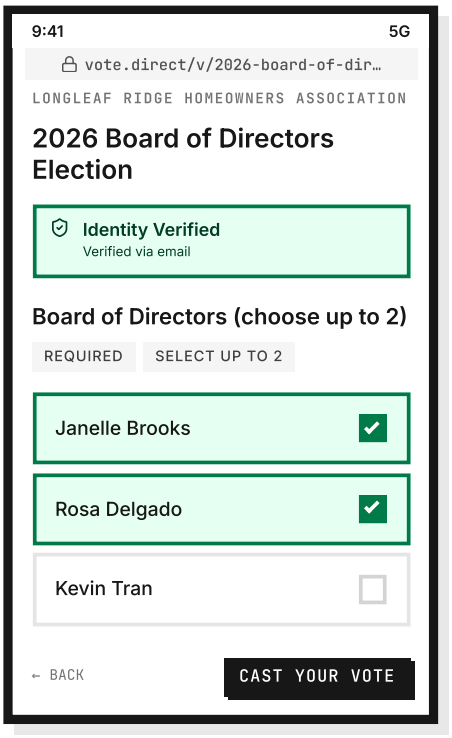
How to build, test and publish an election, what your voters see, and how to close it with a record you can stand behind. Plus surveys, live meetings, announcements, signatures, your team and billing.

For boards, managers, clubs and member organizations

Edition October 2026

Online vote.direct/user-guide





About this guide

This guide is for the person running a vote: a board member, a community manager, a club secretary, a nonprofit's staff. It walks through every part of vote.direct you can use yourself, screen by screen, in the order you meet them when you run an election.

How it is organized

- **Part One, Start here.** What vote.direct is, how an election moves from a draft to a closed record, and your account.
- **Part Two, Run an election.** Plan it, build it, add your voters, test it, publish it, send the ballots, watch turnout, close it and keep the record. Paper and mailed ballots, inspectors of elections and managed elections are here too.
- **Part Three, Beyond elections.** Surveys and quick polls, live meetings with motions voted from phones, announcements, electronic signatures, and Governance Center.
- **Part Four, Your account and help.** Your team and their roles, billing, every settings page, a troubleshooting guide, how to reach us, and a glossary.

If you are running your first election, read How vote.direct works and Plan your election first. After that, each chapter stands on its own.

How to read the pages

Bold text	A label you see on screen: a button, a tab, a heading or an option, spelled exactly as the product spells it.
`vote.direct/dashboard`	An address you can type into your browser, or a link you will see.
Tip	A shortcut or a good habit.
Good to know	A rule or a limit that is easy to miss.
Before you publish	Something that cannot be undone, or cannot be changed once voting starts.

About the screens in this guide

Every screen in this guide is drawn from the product itself, with the same labels, in the same order. The names and numbers are sample data from Longleaf Ridge Homeowners Association, a fictional community of 212 homes in Harlow Springs, North Carolina. Every person, address and email in it is invented. Your own screens will show your community, your dates and your voters.

The product is improved often. If a label on your screen differs from this edition, the screen is right. The latest edition of this guide is always at `vote.direct/user-guide`, with a PDF you can download.

What this guide does not cover

Prices. Prices change, so they are not printed here. They are on vote.direct/pricing, and the product always shows the price for your election before you pay.

Legal advice. Where this guide mentions state rules, it describes what the product checks or offers. That is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it. Your governing documents and your state's law decide what your election must do.

> NEED A HAND?
>
> Call or text **(512) 222-8191**, email **support@vote.direct**, or press **Report a problem** at the bottom left of any page once you are signed in. See Getting help.

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PART ONE

Start here

What vote.direct is, how an election moves from a draft to a closed record, and how your account and dashboard are laid out.

CHAPTER 1

How vote.direct works

The ideas behind every screen in this guide: what an election is made of, how it moves from a draft to a closed record, how ballots reach your voters, and what you hold at the end.

IN THIS CHAPTER

- What vote.direct is for
- The parts of the product
- The life of an election
- How ballots reach voters
- Secret, anonymous or identified
- What you hold at the end
- Who is involved
- What it costs
- What vote.direct does and does not do

What vote.direct is for

vote.direct runs private member elections and decisions: homeowners and condominium associations, co-ops, nonprofits, clubs, congregations and other organizations whose members vote. You build the ballot, upload your member list, and send each member their own ballot. Each member proves who they are before they vote, can vote once, and gets a confirmation code. When voting closes, the count is frozen and you have a results certificate, exports and an audit log you can hand to your board, your members or your attorney.

Most organizations run their elections themselves. If you would rather have us run it, see Managed elections.

The parts of the product

Part	What it is for	Where you find it
Elections	Verified votes: board elections, budgets, bylaw amendments, resolutions. One ballot per voter, a confirmation code for each, a frozen count and a certificate.	**Create** in the header, and the **Votes** tab on Home
Surveys and quick polls	Free, open feedback through a link anyone can answer. No verification, so not for binding decisions.	The **Surveys** tab on Home
Live meetings	Motions voted on from phones during a meeting, under Robert's Rules.	**Meetings** in the header
People	Your contact book. Everyone you add to an election is saved here for next time.	**People** in the header
Announcements	Email to your members from your own domain, with a plan that includes announcements.	**Announcements** in the header
Electronic signatures	Send a PDF to be signed on a phone or a computer, with a certificate of completion.	`vote.direct/dashboard/signatures`

Part	What it is for	Where you find it
Governance Center	A separate product for running a community: meetings and minutes, records, dues, requests, a member portal.	governance.center, or extra menu items when your plan includes them

The rest of Part One covers your account. Part Two covers elections. Part Three covers everything else.

The life of an election

Every election is in one of four states. The state decides what you can still change and what your voters can do. You see it as a badge on the election's card and at the top of its page.

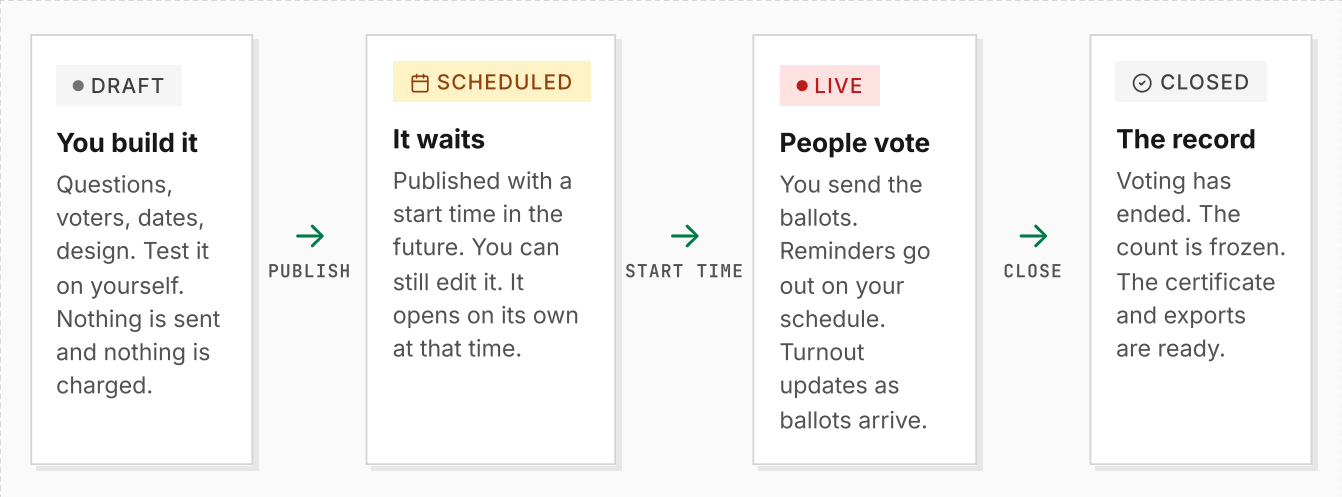


FIGURE 1.1 The four states of an election. Publishing an election whose start time has passed, or that starts immediately, takes it straight to Live.

Draft

An election starts as a draft in the Create wizard: five steps called **Your Vote**, **Voters**, **Schedule**, **Design** and **Review**. A draft can be changed freely and saved to finish later. You can send yourself a free test ballot that looks exactly like the real one. See Build the election and Test, then publish.

Publish

Publishing opens the election now, or schedules it to open at the start time you set. If the election has a price, you pay at this moment, from your prepaid balance or on a secure checkout page. An election needs at least one voter on its list before it can be published. A scheduled election can still be edited; the questions and rules lock when voting opens.

> GOOD TO KNOW
>
> Publishing does not email anyone. After you publish, the next screen has one button, **Email your voters their ballots**. Nothing reaches your voters until you press it, or until you hand out printed notices or paper ballots yourself.

Scheduled and Live

A scheduled election opens itself at its start time. While an election is live, voters can vote, and you can watch turnout, send the ballot to anyone who has not received it, add late voters, remind people who have not voted, and change the close time. The questions, the voting rules and who can see results are locked, so no ballot is ever judged by different rules from the one before it. See While voting is open.

Closed

An election closes at its close time, or earlier if you press **Close Early**. An election with no close time stays open until you close it. Once closed, no more ballots are accepted, online or on paper, and the count is frozen. The results, the certificate, the exports and the audit log are on the election's **Results** tab. See Close, results and the record.

How ballots reach voters

Each voter on your list has a way of voting. Most people get an email. You can set any voter to a different channel, so one election can reach everyone: members with email, members with only a mobile phone, and members who want paper. All of their ballots land in one count.

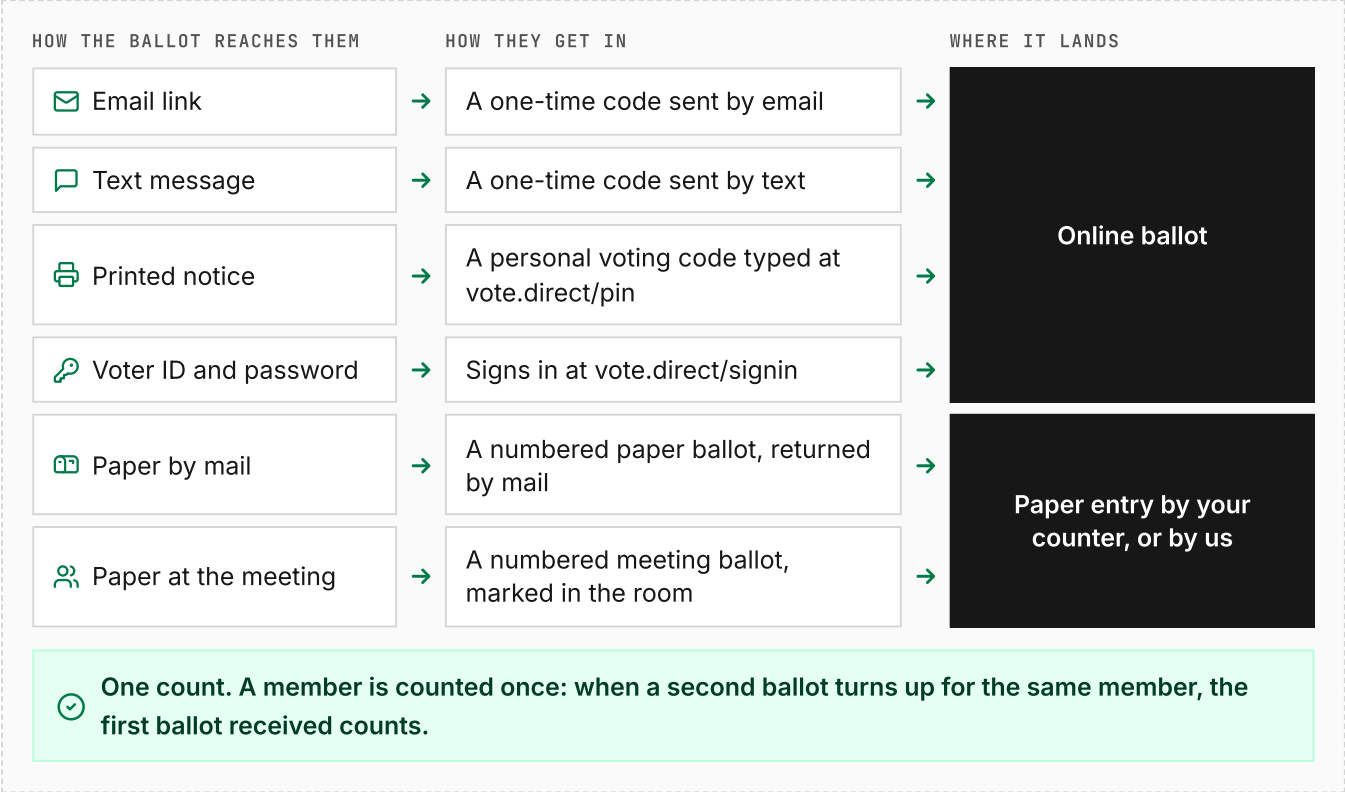


FIGURE 1.2 One election, many ways in. Every channel feeds the same count, and the same member cannot be counted twice.

Some things to know about the channels:

- **Email** is the default and needs nothing extra. A voter who gets an email proves who they are with a one-time code sent to that address.

- **Text messages** are included with paid elections. Elections with 25 voters or fewer are free and send email only. Before anyone is texted, you confirm that your organization has their permission to text them, because carriers require it.
- **Printed notices, link lists and Voter ID sheets** are files you download and hand out yourself. Each carries a code or a link that opens that voter's own online ballot.
- **Paper ballots** are printed, numbered and tracked in a ledger. You can print and mail them yourself, have us mail them, or have us mail them and enter the returns. See Paper, mail and in-person ballots.

Secret, anonymous or identified

Before an election goes live you choose how the link between a voter and their ballot is treated. This is called ballot secrecy. It locks when voting opens.

Setting	What it means
Identified	You can see who voted and how each person voted. Right for votes your documents require to be on the record.
Anonymous	Voters' identities are kept out of what you see, the results and the exports. You see who has voted, never how. Results stay hidden from voters until a minimum number of ballots are in (five unless you change it). This is the starting setting when you build from scratch.
Sealed	Each ballot is stored with no link to the voter at all. Nobody, you included, sees a tally until voting closes, voters cannot change a ballot, and paper ballots are not available. Built for rules that require permanent separation.

Whichever you choose, you always see turnout: who has voted and who has not. Build the election shows the setting itself.

What you hold at the end

- **Results.** The count for each question, the winners, ties reported as ties, and whether quorum and any required share to pass were met.
- **The results certificate.** A PDF with the election's details, turnout, quorum, results, how voters were verified, an audit summary and the integrity check.
- **Exports.** A CSV and a PDF of the results, and for identified elections a per-voter report.
- **The audit log.** Every action on the election, in order. Each entry is linked to the one before it, so an edited or deleted entry breaks the chain and the integrity check reports it. The chain's fingerprint is printed on the certificate, so a copy you keep can be compared with the record later. This is what makes the record tamper-evident.
- **Each voter's confirmation code.** A voter can keep it as their receipt and download a confirmation certificate. The code proves a counted ballot exists; it never shows how they voted.

Who is involved

You, the organizer	The person who creates the election, who can do everything on it. In a shared workspace, owners and admins can also close, cancel and export any election, and editors can change one. See Team and roles.
Your team	Other people in your workspace, each with a role: owner, admin, editor or viewer.
Your voters	The people on the election's voter list. Your list is your record of who may vote. vote.direct does not decide who is eligible.
An inspector of elections	Optional in most places: a neutral person who confirms the roster and certifies the count on their own private page. Some states' rules call for one. See Inspectors and state rules.
Counters and receivers	For paper ballots: people you give a link to, so they can photograph returned envelopes or enter ballots without an account.
Our support team	Reachable by phone, text and email. If you give us access to an election to help you, a banner says so on its page and you can revoke it at any time.

What it costs

Elections with 25 voters or fewer are free and send email only. Larger elections have one price, set by the number of voters on your list, charged once when you publish. When each unit gets its own ballot, the list is counted in ballots, not people: 21 owners of 27 units is a 27-ballot election, and the wizard says so beside the price. Email and text verification are included in every paid election, and nothing is charged while you build or test. Paper packets we print and mail are charged per packet, when the mailing is sent. Surveys are free. A subscription can cover your elections instead of paying for each one.

The prices themselves are on vote.direct/pricing, and the wizard shows the price for your list before you pay. See Billing and payments.

What vote.direct does and does not do

It does

- Send each voter their own ballot when you tell it to, and remind the ones who have not voted on the schedule you set.
- Check each voter's identity against your list before they vote.
- Accept one ballot per voter, and keep the first ballot received when a member votes twice.
- Count the ballots the way the question is set up, and report ties as ties.

It does not

- Contact your voters before you send the ballot.
- Decide who is eligible. Your list is the record.
- Pick a winner when candidates tie. Your governing documents decide how a tie is settled.
- Make an election valid or binding, or tell you that your process meets the law.
- Give legal advice. Where this guide or the product mentions a state rule, it is our reading of the rules to support your review, not legal advice. Have

- Freeze the count at close and produce the certificate, exports and audit log.
- Check your settings against the rules it holds for some states, and tell you what it finds.

your association's attorney confirm before your board relies on it.

CHAPTER 2

Your account and dashboard

How to create your account and sign in, what happens on your first visit, and the parts of the dashboard you use every day: Home, the header, notifications and workspaces.

IN THIS CHAPTER

- Create your account
- Sign in
- When sign-in does not work
- Reset a forgotten password
- Why email links open a page with a button
- Your first visit
- Home
- The header
- Notifications
- Workspaces
- Connect an AI assistant
- Report a problem

Create your account

You need an account to publish an election. You can start building one at `vote.direct/create` before you have an account; vote.direct asks you to create one before anything is published.

There are two ways to create an account: with your Google account, or with your email address and a password. Open `vote.direct/signup`. The card reads **Create your account**. If it reads **Sign in to your account** instead, press **Create one** at the bottom of the card.

With Google

Press **Sign up with Google** and choose your Google account. Google has already confirmed your address, so there is no code to type. You land on your dashboard.

With your email address

1. Type your address in **Email address**.
2. Type a password in **Password**. The only rule is length: at least 12 characters. The line **At least 12 characters** turns green with a check mark when the password is long enough. A few ordinary words in a row make a good password.
3. Press **Create Account**. The card changes to **Enter your code**.
4. Open the email with the subject "Confirm your Vote Direct account". It holds a numeric code and no link. Type the code on the card and press **Confirm and continue**.

Two kinds of password are refused even when they are long enough. A password that is easy to guess gets "That password is too easy to guess. Try a few unrelated words instead." A password found in a known data breach gets "That password has appeared in a known data breach. Choose a different one, ideally a few

unrelated words." The card keeps your email address, so you only type a new password.

A small security check from Cloudflare may appear above the button. If it cannot load, often because of an ad blocker or an office network, the card says **The CAPTCHA could not load. An ad blocker or your network may be blocking it. You can continue.** The button still works.

If you reached the sign-up card while building an election, a green box above the form says what you were setting up and that your account includes one free test election for up to 5 people. It also names the starting price for a real election; prices are on vote.direct/pricing.

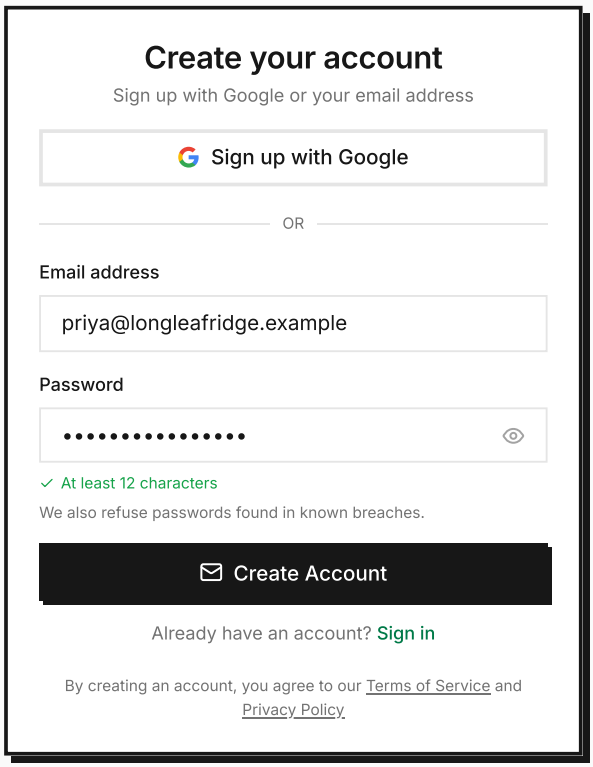


FIGURE 2.1 The sign-up card with a password long enough to pass. The security check that can appear above Create Account is left out.

The Enter your code screen

The code screen names the address the code went to. Type the code in the large box. It accepts digits only; if you paste a line such as "Code: 48302917", it keeps just the digits. Press **Confirm and continue**. The code expires in an hour.

- If your address is a Gmail, Outlook, Yahoo, iCloud, AOL or Proton address, a black button such as **Open Gmail** opens your inbox in a new tab.
- No email after a minute? Check your spam folder, then press **resend it** in the line "Nothing after a minute? Check spam, or resend it". A new code cannot be sent within a minute of the last one. If you ask too soon, the screen says "A code went out less than a minute ago. Wait a minute, then try again."
- Typed the wrong address? Press **Use a different email** to start again with an empty form.

> WHY A CODE AND NOT A LINK
>
> Many email systems, especially at offices, open every link in a message before you see it, to check it for danger. A link that confirms an account works only once, so the scanner would use it up. A scanner cannot type a code, so vote.direct confirms new accounts with a code.

If you already have an account

vote.direct and Governance Center share one sign-in. If you have signed up on either product with an address, that address already has an account, and the same password works on both. When you try to create an account with an address that already has one, vote.direct does not make a second account and does not send a code. It emails a link to choose a new password instead, with the subject "You already have a Vote Direct account". The box **Already have an account?** on the code screen explains this and offers **Sign in with this email** and **Reset my password**. Both keep the address you typed.

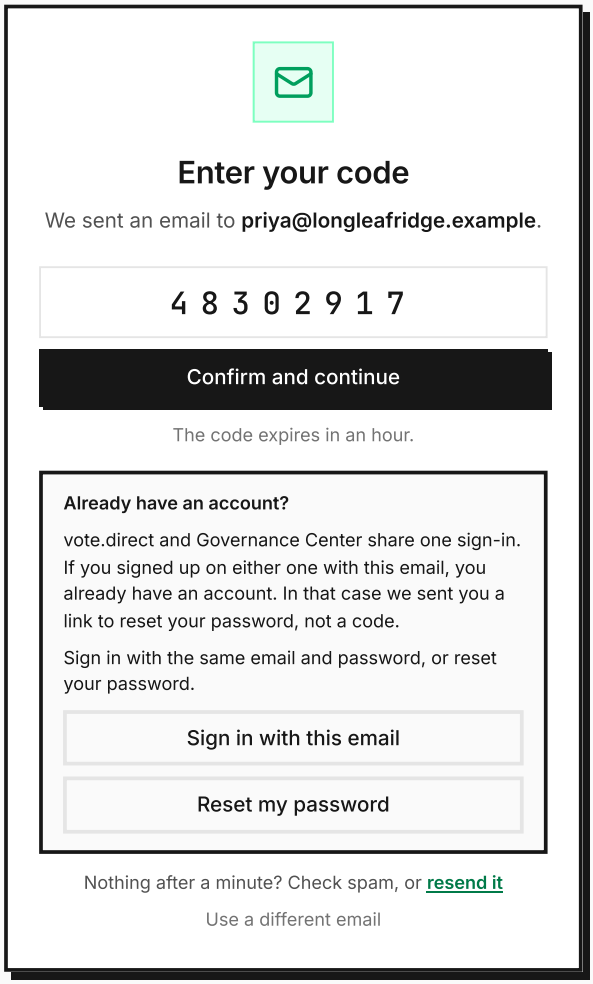


FIGURE 2.2 The code screen after Create Account. The box in the middle covers the case where the address already had an account and a reset link was sent instead of a code.

Sign in

Open `vote.direct/login`, or press **Sign In** at the top of any vote.direct page. The card reads **Sign in to your account**.

- If you signed up with Google, press **Continue with Google**.
- Otherwise, type your **Email address** and **Password** and press **Sign In**.

You land on your dashboard, or on the page you were trying to open when vote.direct asked you to sign in.

Those are the only two ways in. vote.direct has no emailed sign-in link, no sign-in by text message and no two-step verification of its own. If you sign in with Google, Google's own security settings, including its two-step verification, protect that sign-in.

If you are already signed in, opening the sign-in page or the vote.direct home page takes you straight to your dashboard. To sign out, press **Sign Out** (see The header).

When sign-in does not work

The card says what went wrong in plain words, and most messages come with a button or link that fixes it. The messages appear under the button, or in a box above the form.

What you see	What it means and what to do
That email and password don't match.	The address and the password do not belong to one account. The message names the usual reasons: you signed up with Google (use the Google button), you have the wrong password (press **reset your password** in the message), or you have no account yet (press **Create an account →**). The same password works on vote.direct and Governance Center.
Your email address has not been confirmed yet, so your password does not work until it is.	You created the account but never typed the code. Press **Send me a new code** and type the new code, or use **Forgot password?** to choose a new password, which also confirms the address. If you confirm with a new code, the account keeps the password you chose the first time.
This address signed up with Google. Use the Google button.	The account has no password. Press **Continue with Google**, which is now outlined in green.
That confirmation code has expired or was already used. We can send you a new one.	Press **Send me a new code**. Type your address first if the box is empty.
That code is incorrect or has expired. Check the latest email, or send a new code.	Shown on the code screen. Use the code from the newest email, or press **resend it**.
Your sign-in session expired.	This usually happens when a link opens in a different browser from the one you started in. Sign in again in the browser you are using now.
Google did not finish signing you in. Try signing in again.	Press **Continue with Google** again.

What you see	What it means and what to do
Too many sign-in attempts. Try again later.	After 10 attempts in 15 minutes from one network, sign-in pauses. Wait 15 minutes, or reset your password.
This account was closed, so you can no longer sign in to it.	The account was closed in Settings. Neither button works for a closed account. Email support@vote.direct about reopening it.
Please sign up with a permanent email address.	Throwaway email services cannot be used. Sign up with your regular address.
Too many signup attempts from this network.	Wait an hour and try again, or write to support@vote.direct.
This service is not available in your region yet.	vote.direct does not accept new accounts from a few regions.
The CAPTCHA could not load.	An ad blocker or your network is blocking the security check. Carry on: the form still works.

Reset a forgotten password

1. On the sign-in card, press **Forgot password?**. The card changes to **Reset your password**.
2. Type your **Email address** and press **Send Reset Link**.
3. The card reads **Check your email**. It says the link is on its way if the address has an account. For your privacy it says this whether or not the address has one.
4. Open the email with the subject "Reset your Vote Direct password" and press **Reset Password**.
5. A page opens with one button, **Continue to reset password**. Press it. The next section explains why this page exists.
6. On **Reset your password**, type a **New password** of at least 12 characters, type it again in **Confirm new password**, and press **Reset Password**.
7. The page says **Password updated**. Press **Go to Dashboard**.

The link works once and lasts an hour. If the page says **Invalid or expired link**, the link was already used or is too old: press **Back to Sign In** and send yourself a new one.

To change a password you still know, sign in and use **Change password** in Settings (see Settings reference).

Why email links open a page with a button

A link in an account email from vote.direct, such as the link in a password reset email, does not do its job the moment it opens. It opens a short page with a heading, one sentence and one black button. Nothing happens until you press the button.

This protects the link. Many email systems, especially at offices, open every link in a message before you see it, to check it for danger. If the link did its job by itself, the scanner would use it up, and you would be told your brand-new link had expired. A scanner does not press buttons, so the link waits for you. The page works without anything extra in your browser, even inside an email app.

The heading and button depend on what the email was for. For a password reset, they read **Reset your password** and **Continue to reset password**. A request to change your email address reads **Confirm your new email** and **Confirm and continue**. If the page is not what you expected, press **Sign in another way** under the button.

Some email programs cut long links in half. Then the page reads **This link is incomplete** and offers **Go to sign in** and **Create an account**. Sign in with your password or with Google, or send yourself a new email.

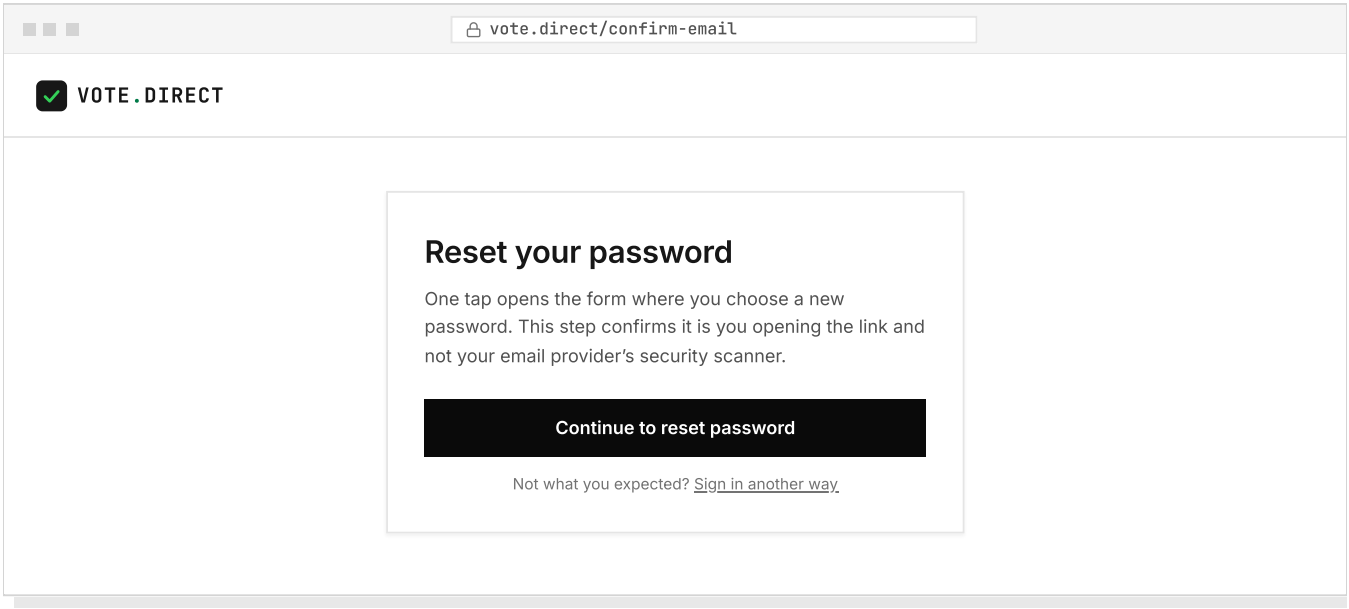


FIGURE 2.3 The page a password reset link opens. The reset form appears only after you press the button, so a mail scanner that opens the link cannot use it up.

Your first visit

The first time you open your dashboard, vote.direct creates a workspace for you. A workspace is where your elections, your team and your settings live; the product labels it **Organization** in Settings and in the workspace switcher (see Workspaces). You are its owner.

vote.direct names the new workspace after you, for example "Priya Raman's Organization". Rename it to your association's real name in **Settings**, **Organization**. vote.direct does not send ballot email under the generated name; until you rename it, messages to your voters fall back to vote.direct's own name as the sender (see Settings reference).

Next, a full-screen welcome asks **What do you want to run first?** It offers three cards:

Card	What it does
Run a board election	"Verified ballots for HOA, condo, or nonprofit board seats." Opens the election wizard filled in with the Leadership Election template.

Card	What it does
Approve a budget or document	"Pass a budget, amendment, or resolution with a clear record." Opens the wizard filled in with the Budget & Spending Approval template.
Just exploring	"Look around the dashboard first." Closes the welcome and shows Home.

Everything a template fills in can be changed in the wizard (see Build the election). Under the cards, the link **Already have your member list? Add your community first** opens People, where you can load your member list before you build anything (see Voters and your roster).

The line at the bottom says drafts are free and you pay only when you publish, and names the starting price. See vote.direct/pricing for prices.

> GOOD TO KNOW
>
> If your account already has elections, or you went straight to building an election, vote.direct creates the workspace without showing the welcome.

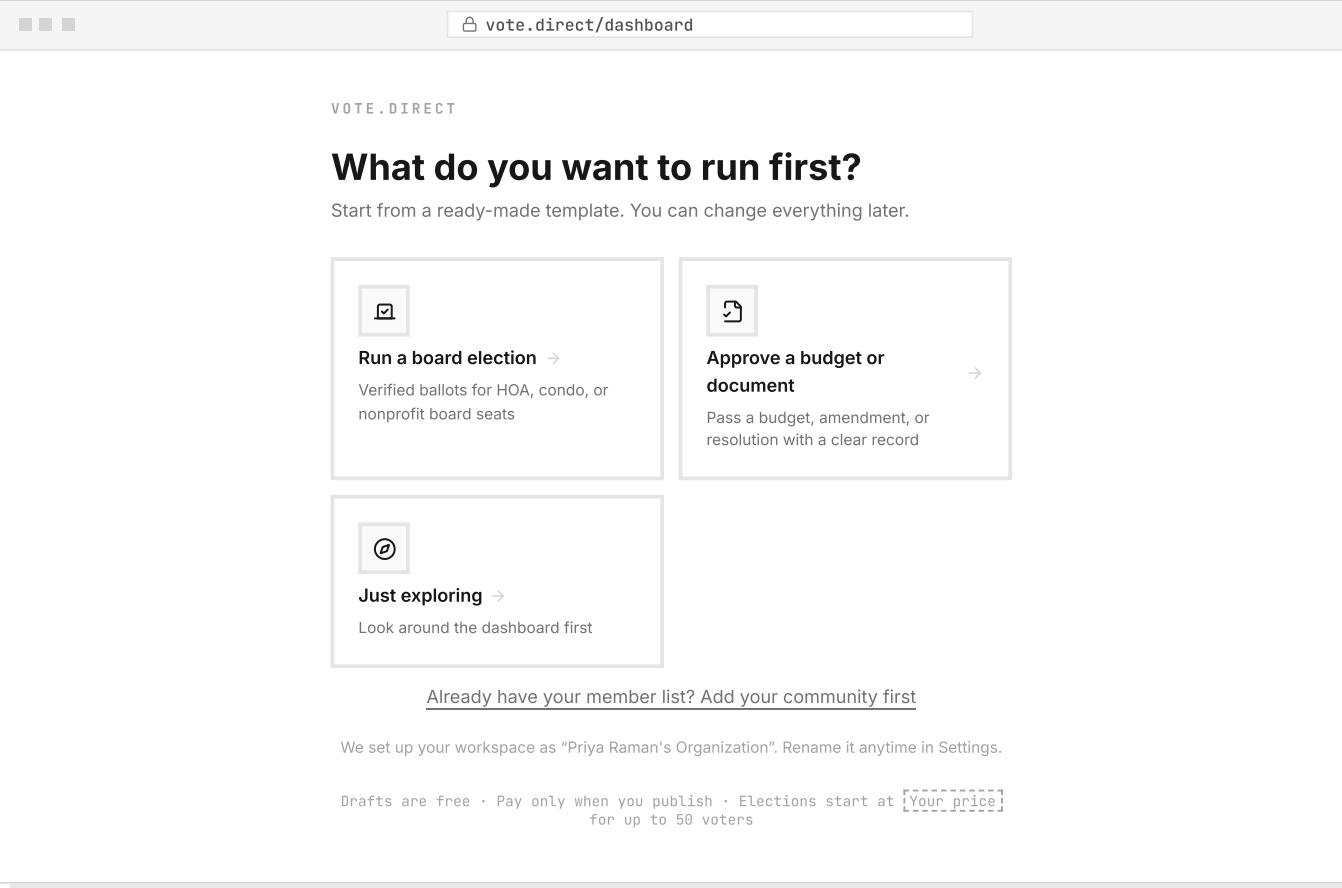
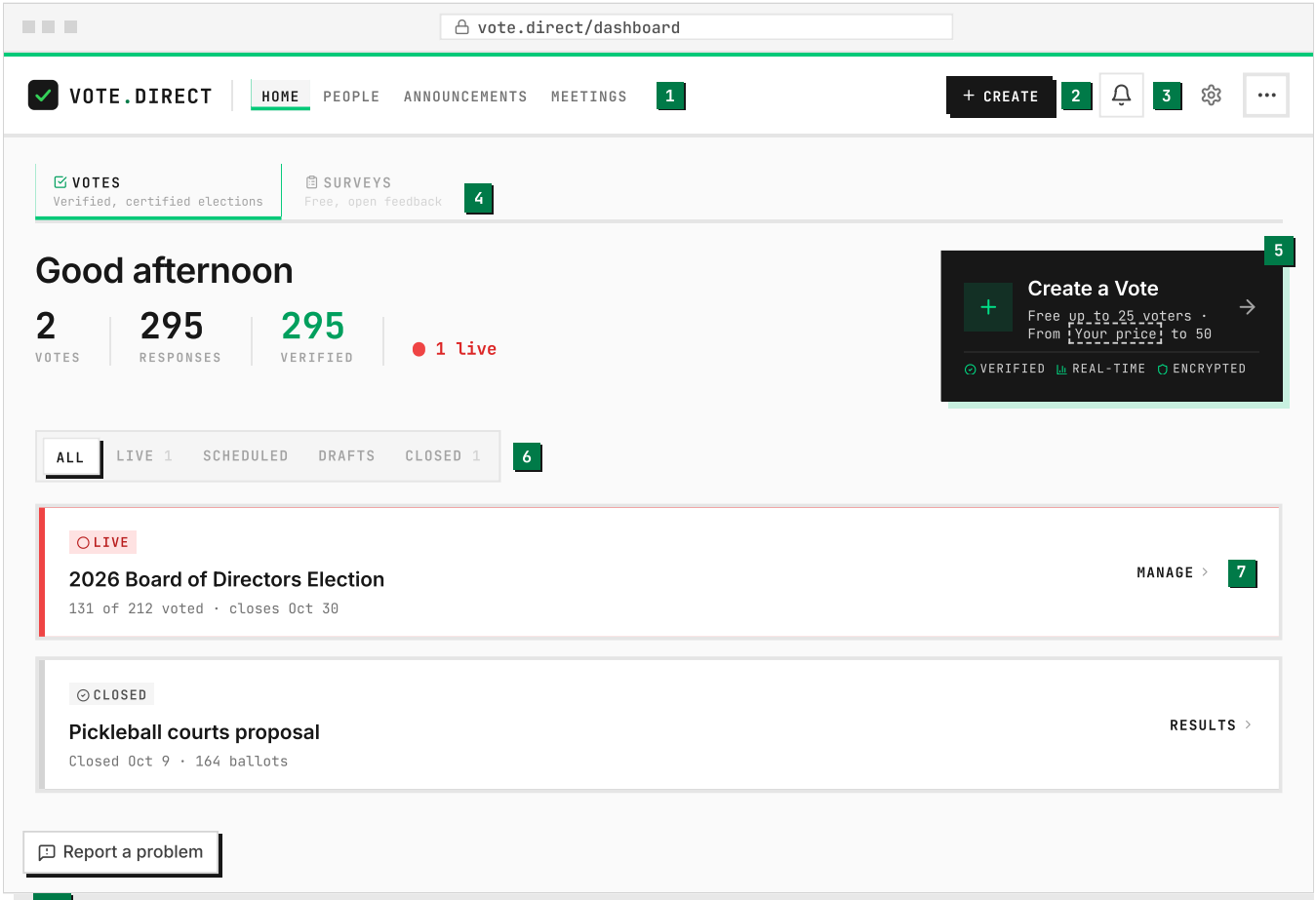


FIGURE 2.4 The welcome on a new account's first visit. It covers the whole window; the starting price appears where the figure says Your price.

Home

Home is the page at `vote.direct/dashboard`, and the **Home** link in the header. It lists the elections in your active workspace, including the ones your teammates created. Surveys have their own tab.



1. The navigation links. The page you are on is shaded and underlined in green.
2. **Create** starts a new election.
3. The bell opens your notifications.
4. The Votes and Surveys tabs.
5. The Create a Vote card does the same as Create.
6. Filters, with a count beside each status that has elections.
7. Each election is one card. The words on the right are the next step; press anywhere on the card to go there.

FIGURE 2.5 Home on a laptop during the 2026 Board of Directors Election. The Report a problem button sits in the bottom-left corner of every signed-in page; the starting price appears where the card says Your price.

The top of the page

Two tabs sit at the top: **Votes**, "Verified, certified elections", and **Surveys**, "Free, open feedback". The Votes tab is Home.

Below them, a greeting reads **Good morning**, **Good afternoon** or **Good evening**, by your computer's clock. Under the greeting, three counts cover every election in the workspace: **Votes** is the number of elections, **Responses** the ballots received across them, and **Verified** the ballots from voters who passed verification.

When elections are open, a red dot and "1 live" (or the number open) follow.

On the right, the dark **Create a Vote** card starts a new election, exactly like **Create** in the header. Its small print says elections of up to 25 voters are free and names the starting price for larger ones.

Cards that appear when they apply

Between the top of the page and your list, Home shows a few cards only when they have something to say.

Run a free test vote	One per account. It hides itself once you have used it. See The free test vote below.
Ready to publish	A green banner with the title of an election you built before you signed in, and a **Publish Now** button. If the election needs payment first, it stays a draft and a message says "Almost there: payment needed to publish"; vote.direct opens the election so you can finish. Press **×** to hide the banner.
You have an unfinished draft	An amber banner, "Continue where you left off", when you left the election wizard part way through on this computer. **Continue Editing** returns to the wizard. **×** discards that unsaved copy.
Getting started	A four-step checklist for new accounts. See below.
Coming up	A reminder of a real election you planned after a test run. See below.

The free test vote

Each account can run one free test vote: a real, small election that emails real ballots to you and up to 4 other people, so you can watch voting and live results before you pay for anything.

1. Press **Run a free test vote**.
2. Give it a name in **Vote name**. Left blank, it is called "My Test Vote".
3. Under **Also send to**, add up to 4 more addresses, one per box. **Add another person** adds a box. Board members, or a second address of your own, show how several ballots add up in the results.
4. Press **Create & send test vote**, or **Maybe later** to close without using it.

The dialog then reads **Your test vote is live** and lists the addresses a ballot was sent to. **Open my ballot** opens your own ballot in a new tab and **View live results** opens the results. Each voter confirms by email, votes, and sees the results change. The test is free and does not affect your billing.

Throwaway email addresses are refused: "Please use permanent email addresses for your test invites." Once the test is used, the card disappears; trying again from another tab gets "You've already used your free test vote. Create a real vote to send more ballots."

The Getting started checklist

A new account sees a box titled **Getting started** with four steps and a count such as "1/4". The first step not yet done is in bold, with a black button that takes you there.

Step	Done when	Button
Name your organization	The workspace has a real name instead of the generated one. Once it does, the step reads "Set up your organization" with a check mark.	**Name it** opens Settings, Organization.
Create your first vote	The workspace has an election, even a draft, or you have an unfinished draft on this computer.	**Create a vote**
Publish it	An election is published.	**Continue your draft** or **Open your draft**
Invite your voters	A published election has voters on its list or has received a ballot.	**Invite voters** opens your first published election.

The checklist reads your real progress, so there is nothing to tick. It disappears when all four steps are done. The × in its corner hides it on this computer.

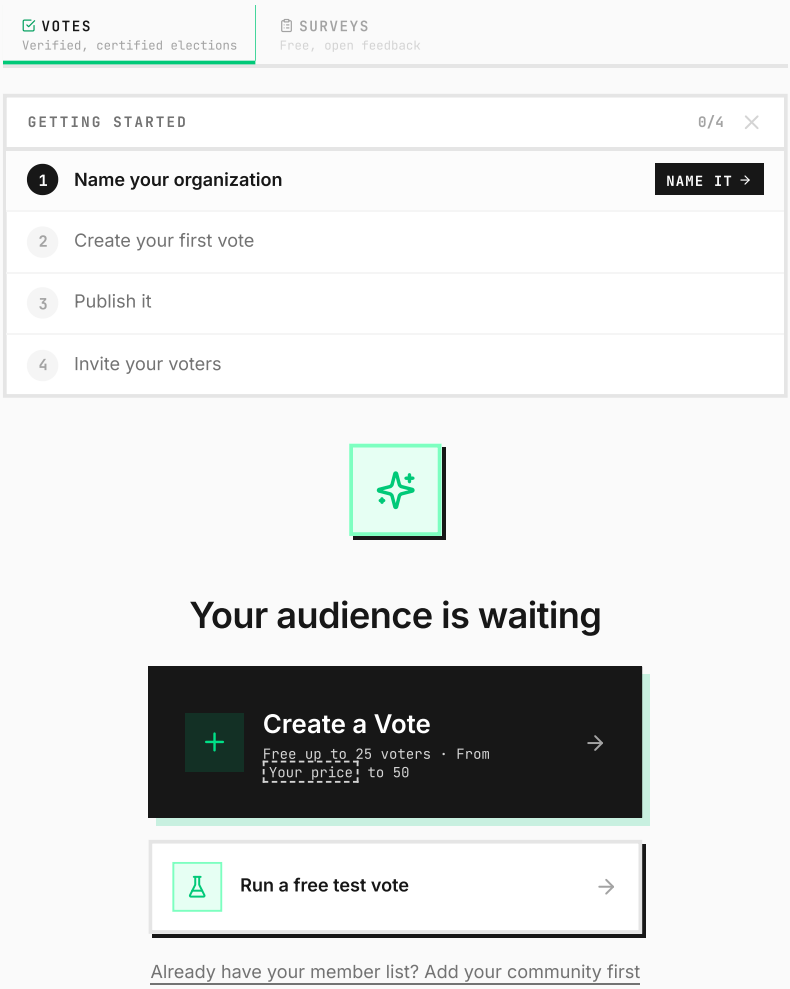


FIGURE 2.6 Home for a brand-new account: the checklist on top, then the empty list with its Create a Vote card and the free test vote. The line of text under the heading and the small print on the test vote card are left out.

Coming up cards

After a small election that looks like a test run, its page asks **Was this a test run?** If you answer **Yes, the real one is coming** and say when voting opens and about how many voters it will have, Home keeps a card near the top until that election happens. It reads **Coming up:** followed by the title, and a line such as "Opens Thursday, November 12 (in 46 days), about 115 voters." Its one button, **Start it from your test run**, starts the real election as a copy of the test's ballot.

Home shows up to three of these. A card goes away once a real election is published after it, or a week after its opening day. A card with no date goes away after 120 days. The card has no close button: change the plan on the test election's page.

Filters and election cards

The filters read **All**, **Live**, **Scheduled**, **Drafts** and **Closed**, with a count beside each one that has elections. If none match, the list says "No votes match this filter".

The list puts the most urgent first: live elections (closing soonest first), then scheduled ones (opening soonest first), then drafts (most recently edited first), then closed ones (most recently closed first). Each card shows a status chip, the title, one line saying where the election stands, and the next step on the right. Dates are shown in the election's own time zone. A colored bar down the left edge matches the status: red for live, amber for scheduled, gray for drafts and closed elections.

Status chip	Example of the status line	Next step on the card
Draft	"1 question · 212 voters", "no questions yet · open to anyone with the link", or "1 question · no voters yet"	**Finish and publish**, or **Add questions** when there are none. An invite-list election with nobody on it shows **Add voters** in amber.
Scheduled	"Opens Oct 19 · 212 voters"	**Manage**, or **Add voters** in amber when the list is empty.
Live	"131 of 212 voted · closes Oct 30"; an election open to anyone with the link shows "131 votes"	**Manage**, or **Add voters** in amber when the list is empty.
Closed	"Closed Oct 30 · 171 ballots"	**Results**

Press anywhere on a card to open the election at the place where its next step is done. **Add voters** opens the election's Voters section ready to add people; **Results** opens its results.

> GOOD TO KNOW
>
> There is no menu on a card. To edit, duplicate, export, close early or delete an election, open it and use its own page (see While voting is open and Close, results and the record).

When you have no elections yet

An empty Home shows a large green sparkle and **Your audience is waiting**, with a large **Create a Vote** card, the free test vote card if you have not used it, and the link **Already have your member list? Add your community first**, which opens People.

The Surveys tab

The **Surveys** tab lists the surveys you created, newest first. Each row shows the survey's status (**Open**, **Closed**, **Scheduled** or **Draft**), its title, and its number of responses and questions. Surveys are free and open to anyone with the link; **New survey** starts one, and an empty tab offers **Create your first survey**. See Surveys and quick polls.

The header

Every signed-in page has the same header: a thin green line along the very top, then a white bar. Its labels are in capital letters. From left to right:

VOTE.DIRECT	The logo. It takes you to Home.
Navigation	**Home**, **People**, **Announcements** and **Meetings**. The page you are on is shaded, with a green line under it.
Create	A black button that starts a new election (see Build the election).
Plan	If you have a subscription plan, a small box with its name. It opens Billing.
Workspace switcher	The name of the workspace you are in, with a small arrow (see Workspaces).
Bell	Your notifications (see Notifications).
Settings	A gear icon, with the word "Settings" beside it on wider screens (see Settings reference).
Sign Out	Signs you out and returns you to the sign-in page.

How much of this fits on one row depends on how wide your browser window is.

Window	What you see
Wide monitor	Everything in one row: the navigation, Create, your plan, the workspace switcher, the bell, Settings and Sign Out.
Most laptops	The navigation, Create, the bell and the gear. A button with three dots opens a panel with your plan, the workspace switcher and Sign Out.
Tablet or phone	A menu button with three lines replaces the navigation. It opens a panel with your plan, the workspace switcher, the navigation links, Settings and Sign Out. On a narrow phone, Create shows only a plus sign.

The panel opens under the header and covers the page. Press the button again, or the Escape key, to close it. The switches happen at window widths of 1,280 and 1,800 pixels; the word "Settings" joins the gear at 1,500.

Link	Opens
Home	Your elections and surveys, described above. An election's own page also counts as Home.

Link	Opens
People	Your member list, the source of your voter rosters (see Voters and your roster).
Announcements	Email messages to your members (see Announcements).
Meetings	Live meetings, where members vote on motions from their phones (see Live meetings).

Workspaces on a Governance Center plan see more links, such as **Documents** and **Dues** (see Governance Center).

> GOOD TO KNOW
>
> There is no account menu, profile picture or help link in the header. Your personal details are in Settings, and help starts with the **Report a problem** button (see Report a problem).

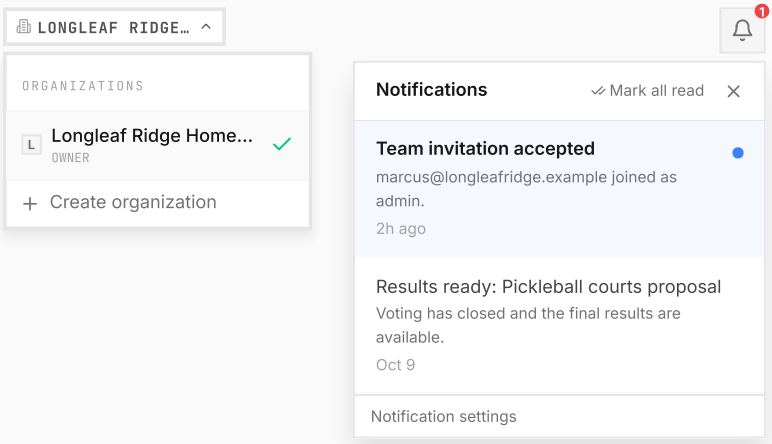


FIGURE 2.7 The two panels that open from the header: the workspace switcher on the left and the notifications panel on the right, with one unread notification. The small picture at the start of each notification row is left out.

Notifications

The bell in the header opens your notifications. A red number on the bell counts the unread ones, up to "9+". The panel lists your ten most recent notifications and checks for new ones every minute.

- Each notification shows a title, a short line of detail and how long ago it happened: "Just now", "5m ago", "3h ago", "2d ago", or a date such as "Oct 9" after a week.
- Unread notifications have a bold title, a light blue background and a blue dot. Pressing one marks it read and opens the page it is about.
- **Mark all read** appears at the top when anything is unread.
- **Notification settings** at the bottom opens **Settings**, **Notifications**.
- An empty panel says "No notifications yet".

The notifications you are most likely to see:

Title	When it appears
New vote: *title*	A teammate created an election in this workspace. The line under it names who.
"*title*" closes in 24 hours	An open election in this workspace closes in a day. The line under it says whether automatic reminders are on, and that you can remind voters who have not voted from the Voters tab.
Results ready: *title*	An election in this workspace closed: "Voting has closed and the final results are available."
Team invitation accepted, Team role changed, A teammate was removed	Someone else changed your team. You are not notified of your own changes.
Name your organization so voters recognise your ballots	Ballots were sent while your workspace still had its generated name.

A few others cover voter lists and email setup. The first three in the table can be turned off, for each workspace separately, in Settings (see Settings reference).

Workspaces

A workspace holds elections, members and settings for one association. The product labels it **Organization**. Each workspace has one owner and can have a team (see Team and roles). Your first workspace is created for you on your first visit, and you can belong to several: your own, any you create, and any you are invited to.

Switch workspaces

The workspace switcher shows the name of the workspace you are in. On a wide screen it sits in the header; otherwise open the panel with the three-dot or three-line button. Press the name to see the list titled **Organizations**. Each row shows a workspace's name and your role in it (**Owner**, **Admin**, **Editor** or **Viewer**), and a green check marks the one you are in. Choose another workspace to switch; the page reloads with that workspace's information.

Create another workspace

1. Open the switcher and press **Create organization**.
2. In the **New organization** dialog, type an **Organization name** of up to 100 characters. This is the name voters see on ballots and invitation emails.
3. Press **Create organization**. You become the owner of the new workspace and land in it.

Use at least two characters: the name field accepts one, but the workspace is not created with a one-letter name. You can create up to five workspaces in an hour; after that the dialog says "You have created several organizations in the last hour. Try again a little later."

What the active workspace decides

- Which elections Home lists, and the counts at the top of Home.
- Which workspace a new election is saved in.
- What the Settings pages under **Workspace** show and change: Organization, Team, Notifications and Sending Domain.
- Which workspace a new AI agent key is filed under.

> TIP
> After you accept an invitation to someone else's team, open the switcher and choose that team's workspace. Until you choose it, Home can keep showing your own workspace instead of the team's.

> GOOD TO KNOW
> There is no way to delete a workspace or to hand its ownership to someone else.

Connect an AI assistant

If you use an AI assistant that can connect to other services, such as Claude or ChatGPT, you can let it work in your vote.direct account. When the assistant connects, vote.direct shows a page headed with the app's name: "*App name* wants to work in your vote.direct account".

- It shows the account you are signed in as. **Use another account** signs you out and brings you back to the same page.
- Under "It will be able to:" it lists what the assistant may do, for example "See your elections and surveys, their status and turnout", "Draft elections and add voters to drafts", and "Create free surveys, which can go live right away for anyone with the link". A draft charges nothing and contacts no one, and sending invitations always stays with you.
- The checkbox **Also let it publish elections** is off unless you tick it. Publishing charges the election fee from your prepaid balance or plan.
- If vote.direct has not verified the app, a yellow warning appears above the buttons. Allow it only if you started the connection yourself, from an app you trust.

Press **Allow** or **Cancel**. You can disconnect an assistant at any time in **Settings**, **AI agents**, which also covers keys for assistants that do not sign in this way (see Settings reference).

Report a problem

Every signed-in page has a **Report a problem** button in the bottom-left corner. Use it when a page shows something wrong, even if nothing crashed.

1. Press **Report a problem**.
2. Describe what went wrong in your own words, for example "the results page says something went wrong". vote.direct attaches the page you are on and your account, so you do not need to include them.

3 Press **Send**. The dialog thanks you once the report is in the support inbox.

If the report cannot be sent, the dialog says "That did not send. Please email support@vote.direct or call (512) 222-8191."

If a page fails completely, vote.direct shows **Something went wrong** with **Try Again** and **Home** buttons. The details of the error are sent automatically. You can add a note under **What were you trying to do? (optional)** and press **Send to support**. For other ways to reach a person, see Getting help.

PART TWO

Run an election

Plan it, build it, add your voters, test it and publish it. Send the ballots, watch turnout, close it and keep the record. Paper and mailed ballots, inspectors of elections and managed elections close out this part.

CHAPTER 3

Plan your election

The decisions to make before you open the wizard, what each one changes, and where you set it. With these answers in hand, building the election takes minutes.

IN THIS CHAPTER

- Start from your governing documents
- Your voter list
- How each voter gets a ballot
- One vote per person, per unit, or weighted
- Secret, anonymous or identified
- Questions and how they are counted
- Dates and reminders
- Who sees results, and when
- Quorum and the share needed to pass
- Proxies, paper and inspectors
- Budget and a test run
- A planning checklist

Start from your governing documents

vote.direct applies the rules you choose. Your bylaws, your declaration or covenants, your election rules and your state's law decide what those rules should be. Before you build, look up the answers to these questions:

- Who may vote: every owner, one vote per home or unit, members in good standing, the board only?
- Does each vote count the same, or is it weighted by shares, lots or an ownership percentage?
- How many members must take part for the vote to count (quorum)?
- What share of the vote does a measure need to pass: a majority, two-thirds, two-thirds of all members?
- Must the ballot be secret?
- Are proxies allowed, and how many may one person hold?
- How much notice must members get before voting opens, and how?
- Does your state call for an independent inspector of elections?

> NOT LEGAL ADVICE
>
> The product can check your settings against the rules it holds for some states, and this guide names some of those rules. This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

Your voter list

Your voter list, also called the roster, is the record of who may vote. vote.direct checks every voter against it and does not decide who is eligible. Each row is one person who receives a ballot.

The easiest list to work from is the spreadsheet you already have, straight out of your management software or your secretary's records. The importer reads the columns for you, leaves out headings and totals, tidies names and spacing, and shows every change before anything is imported. If you are building a list from scratch, start

from the template at `vote.direct/voter-roster-template.csv`. Its columns are:

Column	What goes in it
Name	The voter's name, as you want it on their ballot.
Email	The address their ballot goes to.
Phone	A mobile number, for voters who get their ballot by text.
Notify By	How they get their ballot: `email`, `text`, `mail`, `in person` or `code`. Leave it blank for email.
Unit	Their unit, lot or home, if votes are counted per unit.
Weight	Their voting weight, if votes are weighted.
Address Line 1, Address Line 2, City, State, ZIP	A mailing address, needed only for voters who get a paper ballot by mail.

A few situations to plan for:

- **Co-owners.** If two owners share one home and your documents give the home one vote, give each owner their own row with the same unit and choose one vote per unit (below), or put both addresses in one email cell and let the importer give each a ballot with the first vote counting for the home.
- **Members with no email.** Give them a mobile number to vote by text, or a mailing address to vote on paper. A voter needs at least one way to be reached.
- **You do not have the list yet.** The wizard can make a link you forward to whoever has it, such as your manager or secretary. They upload the file without an account, and the voters land on your election. The link works for 14 days.

Everyone you add to an election is also saved to **People**, your contact book, so next year's election starts from this year's list. See Voters and your roster.

How each voter gets a ballot

Each voter has one way of voting, set on the list and changeable until they vote. Most elections are nearly all email with a handful of exceptions, and that is fine: everyone lands in one count.

Way of voting	What the voter gets	What you need on their row
Email link	An email with their own ballot link. They confirm with a code sent to the same address.	An email address
Text message	A text with their own link and a code by text. Included with paid elections only.	A mobile number, and your organization's permission to text them
Paper by mail	A printed, numbered ballot packet, returned by mail.	A name and a complete mailing address

Way of voting	What the voter gets	What you need on their row
Paper at the meeting	A numbered paper ballot marked at your meeting and entered afterwards.	Nothing extra
Voting code	A printed code they type at vote.direct/pin to open an online ballot, for example on a shared device.	Nothing extra

Instead of sending emails yourself through vote.direct, you can also hand ballots out: printable notices with a QR code and a personal code, a spreadsheet of each voter's link to send your own way, or a sheet of Voter IDs and passwords. You choose this on the wizard's **Voters** step under **How Voters Get Their Ballot**.

One vote per person, per unit, or weighted

One vote per person	The starting point. Every row on the list casts one ballot that counts as one.
One vote per unit	Co-owners of the same unit, lot or household share one ballot. The first of them to vote casts it, and the others are told it has already been cast and by whom. You can also choose how an owner of several units votes them: one ballot for all of their units, or a separate ballot for each.
Weighted voting	Each ballot counts by a number on the voter's record, such as shares, lots or an ownership percentage. A voter with no number counts as 1.

Units and weights come from your list. Make sure the columns are there and filled in before you import. You turn either rule on under **Voting Rules** on the wizard's **Voters** step.

Secret, anonymous or identified

Choose one of the three ballot secrecy settings. The choice locks when voting opens.

- **Identified** if your documents call for a recorded vote: you see how each person voted.
- **Anonymous** for most secret-ballot elections: you see who has voted, never how.
- **Sealed** if your rules require the ballot to be permanently separated from the voter. Sealed has consequences to plan for: nobody sees a tally until voting closes, voters cannot change a ballot, paper ballots are not available, and an owner of several units casts one ballot for all of them.

Questions and how they are counted

A ballot can hold as many questions as you need. For each one, decide:

- **The question type.** Yes / No for a measure, Single choice or Multiple choice for most board elections, and ranked, approval, scored or cumulative voting if your documents call for them.
- **How many seats.** For a board election, the number of seats to fill. A Multiple choice question limits each voter to that many choices.
- **Candidates.** Their names, and if you like, a photo and a short statement for each.

- **Write-ins and Abstain.** Whether voters may add their own candidate, and whether to offer an Abstain choice that counts toward turnout but never wins.
- **A required share to pass.** For a Yes / No measure that needs more than a simple majority, such as two-thirds of votes cast.

If any members vote on paper, plan to use Single choice, Multiple choice and Yes / No questions: those are the types a paper ballot can be entered for. See Ballot questions and voting methods.

Dates and reminders

- **When voting opens.** As soon as you publish, or at a start time you set.
- **When it closes.** A close time, or none, in which case it stays open until you close it.
- **Whether online voting closes earlier.** For an election decided at a meeting, the web ballot can stop when the meeting is called to order while paper and in-person ballots are still entered until the close.
- **Reminders.** Automatic reminders are on to start with: voters who have not voted are reminded 3 days and 1 day before voting closes, at 9:00 AM. You can choose another plan, write your own message, or turn them off.

> GOOD TO KNOW
> Times are set in the time zone of the computer you build the election on, and the Schedule step shows which zone that is. There is no separate time-zone picker, so build the election from a computer set to your community's time zone.

Your governing documents and your state's law set how much notice members must get. Set the dates with that in mind, and leave yourself time to send the ballots once the election is published.

Who sees results, and when

You always see the tally on your dashboard, except with sealed ballots before the close. What voters see is your choice:

Private	Voters never see results. They stay in your dashboard, during and after the vote.
After close	Voters get a results page once voting closes. This is the starting setting.
Live	Voters see a running tally while voting is open. That can influence people who have not voted yet, so it is unusual for elections. Not available with sealed ballots.

With anonymous ballots, voters see a locked screen until a minimum number of ballots are in, five unless you change it. If you appoint an inspector of elections, voters see results only after the inspector certifies them.

If your workspace has a team, you also choose who on it sees results before voters do. **Owners and admins** is the starting setting: you and the workspace's owners and admins see the tally, and editors and viewers see it when voters do. **Everyone on your team** shows it to every member, viewers included, so a clerk or a board can

watch the count without being able to close or delete anything. They cannot download the results, and on an anonymous ballot they wait for the minimum number of ballots, as voters do. Keep it with owners and admins when people on your team are on the ballot. See Team and roles.

Quorum and the share needed to pass

These are two different things, and many measures need both.

- **Quorum** is how many must take part for the vote to count at all. Choose **No quorum requirement**, **Minimum voter count** or **Minimum percentage**. On a weighted election the percentage is of the total voting weight. When each unit gets its own ballot, the percentage is of units, not people: 10 percent of 27 units is 3 ballots, and the results page says so beside the quorum. Turnout is checked against quorum after every ballot, and the results page shows when it was reached.
- **The share needed to pass** is set on a Yes / No question: a simple majority, three-fifths, two-thirds, three-quarters or a custom percentage, measured against the votes cast or against all eligible voters. The results say whether it was met.

An election closes at its close time whether or not quorum was reached. If you close it early before quorum is reached, the product warns you that the results will be advisory only.

Proxies, paper and inspectors

Proxies

The wizard has a proxy voting switch, with a limit on how many proxies one person may hold, from 1 to 10. Members name their own proxy online: once a member has confirmed who they are, with an emailed or texted code, an email link or a voting code, their ballot page lets them name the person who will vote for them, by email address. No vote.direct account is needed. There is no form for you to record a proxy on a member's behalf, so if your members give paper proxies, call or text (512) 222-8191 before you build it.

Paper ballots

If some members will vote on paper, decide who does the work: you print and mail the packets yourself, we mail them and you count the returns, or we mail them and enter the returns for you. Someone must be named to count paper ballots before you can publish, unless we are counting them. Paper ballots must all be entered before the election closes. See Paper, mail and in-person ballots.

An inspector of elections

An inspector of elections is a neutral person who confirms the roster and certifies the count. For a few states, the product will not publish an election until an inspector has been appointed. Even where it is optional, an inspector gives you an independent check if a result is ever challenged. See Inspectors and state rules.

Budget and a test run

Elections with 25 voters or fewer are free and send email only. Larger elections have one price set by the number of voters on your list, charged when you publish. Mailed paper packets are charged per packet. The price for your list appears on the wizard's **Voters** step, in the corner of the wizard and again on **Review**, before

you pay. See Billing and payments.

Plan a test before the real thing. You can send yourself a free test ballot from any election, which is the real email, link, ballot and receipt, without publishing anything. Some boards also run a small practice vote among themselves first. See Test, then publish.

A planning checklist

Where each decision is made, and whether it can still change once voting has opened. Before then, while the election is a draft or scheduled, everything can change.

Decision	Where you set it	Once voting opens
Title, description, questions	Wizard, **Your Vote**	Locked
The voter list	Wizard, **Voters**, or the election's **Voters** tab	You can add voters and remove anyone who has not voted
Each voter's way of voting	The voter list	Changeable until that voter votes
Ballot delivery method	Wizard, **Voters**, **How Voters Get Their Ballot**	Every method stays available from the election page
Weighting, one vote per unit, quorum, ballot secrecy	Wizard, **Voters**, **Voting Rules**	Locked
Start time	Wizard, **Schedule**	Already passed
Close time and online cutoff	Wizard, **Schedule**, or the election's **Settings** tab	Changeable
Who sees results	Wizard, **Schedule**	Locked
Reminders	Wizard, **Schedule**, or the election's **Voters** tab	Changeable
Design and cover image	Wizard, **Design**	Locked
State compliance check	Wizard, **Schedule**, **Compliance**	Set only in the wizard
Sender name	Settings, **Organization**, or under the election's title	Changeable
Paper ballots and who counts them	The election's **Paper ballots** page	Entering continues until the close
Inspector of elections	The election's **Settings** tab	Can be appointed at any time; voters see results once the inspector certifies

> TIP
>
> If you need to change something that is locked, the usual answer is **Duplicate** on the election's **Settings** tab. It copies the ballot and its rules into a new draft, where everything can change again.

CHAPTER 4

Build the election

Start an election from scratch, from a template or from a copy of an earlier one, then work through the five steps of the wizard: your ballot, your voters, the schedule, the design and a final review.

IN THIS CHAPTER

- Start a new election
- Run an election again
- Find your way around the wizard
- Step 1: Your Vote
- Step 2: Voters
- Step 3: Schedule
- Step 4: Design
- Step 5: Review
- Drafts and autosave
- What you can change after publishing

Start a new election

Every election starts on the Create page, `vote.direct/create`. To get there, press **Create** in the bar at the top of any dashboard page, or press the large **Create a Vote** card on your dashboard's Home page.

You can open the Create page and build a ballot before you sign in. Adding voters needs an account, because your voter list is kept with it. If you save or publish while signed out, vote.direct asks you to create an account and holds your ballot for 48 hours while you do.

The Create page offers, from top to bottom:

- **What do you want to run?** Two cards for a first election: **Run a board election** and **Approve a budget or document**. Each opens the wizard with a ready-made template filled in: Leadership Election for the first, Budget & Spending Approval for the second. These cards show only until your workspace has its first election.
- **Start from scratch**. Opens the wizard empty, with one blank question.
- **Your Templates**. Templates you saved from your own past elections. This list appears once you have saved one.
- **Template Library**. Templates written by vote.direct, in two groups that open and close: **General Templates** and **HOA & Condo**.

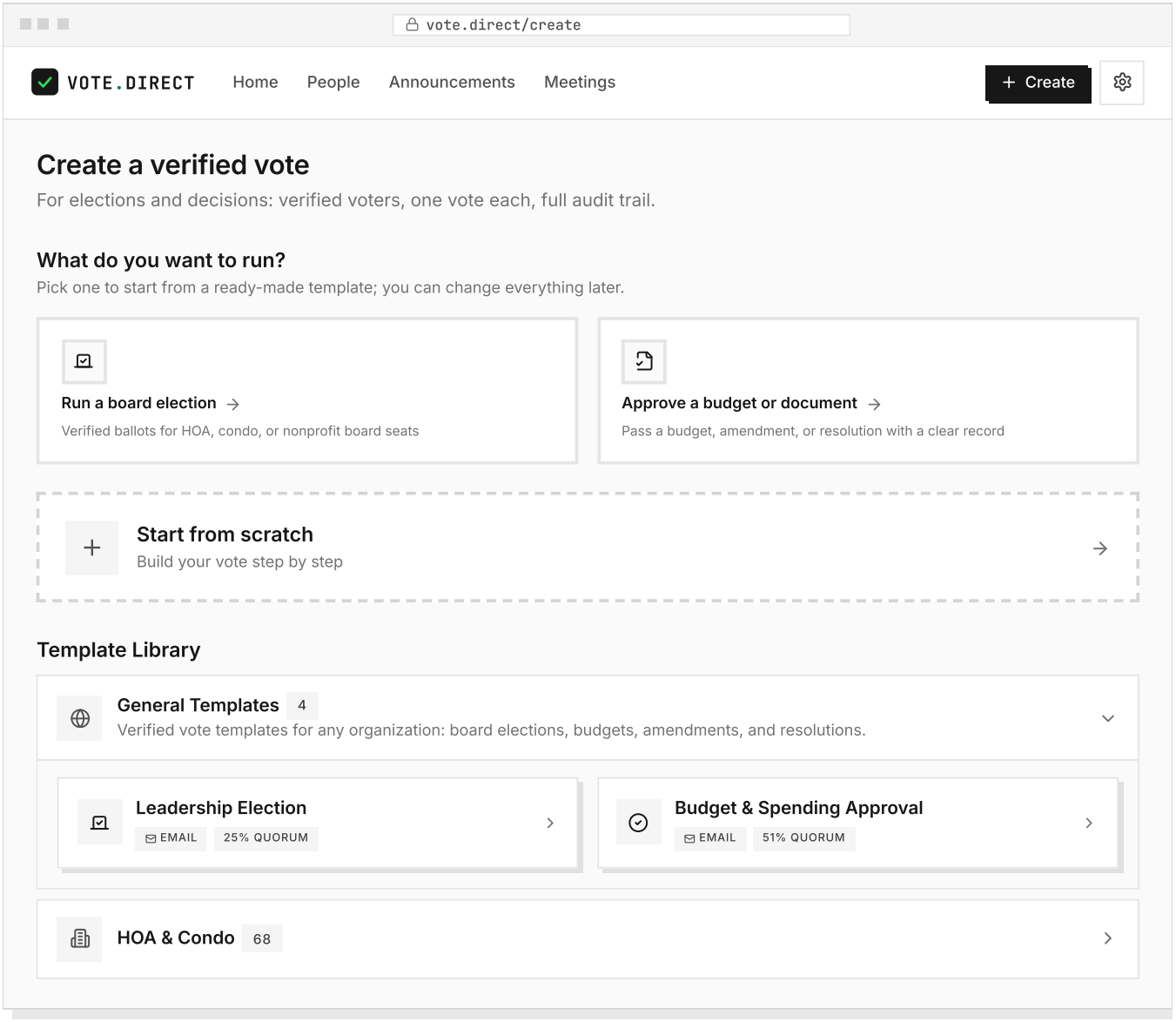


FIGURE 4.1 The Create page as a first-time creator sees it: two starting cards, Start from scratch, and the Template Library with General Templates open.

Pick a template

Press a template's name to open it. You see a short description, a blue box that reads **Pre-fills title** with the title it will put in, badges for the settings it sets, and a **Use Template** button. The template adds this year to its title, so Leadership Election becomes Leadership Election 2026. Press **Use Template** to open the wizard with everything filled in. You can change every setting afterwards.

If you already have an unfinished election in the wizard, vote.direct asks first: **Replace your unfinished draft?** Press **Use template** to discard the unfinished election and start from the template, or **Keep my draft** to keep it. Discarding cannot be undone.

General template	Starts with	Also fills in
Leadership Election	A Single choice question, "Select your candidate", with three placeholder rows: Candidate 1, Candidate 2, Candidate 3	A quorum of 25 percent
Budget & Spending Approval	A Yes / No question, "Do you approve the proposed budget?"	A quorum of 51 percent
Governing Document Amendment	A Yes / No question, "Do you approve the proposed amendment?"	A quorum of 51 percent, and a rule that two-thirds of the votes cast must say yes for it to pass
Meeting Resolution	A Yes / No question, "Do you approve the proposed resolution?"	A quorum of 25 percent

All four use an invite list and email verification, identified ballots (organizers can see who voted how) and results shown after voting closes. Replace placeholder rows such as Candidate 1 with real names, or delete the rows you do not need. Ballot questions and voting methods explains how placeholder rows are handled.

State templates for HOAs and condominiums

The **HOA & Condo** group lists templates by state: California, Florida, Texas, Colorado, Arizona, Nevada, Virginia, Illinois, Washington, Pennsylvania, Maryland, Hawaii, New York, New Jersey, Georgia, Massachusetts, North Carolina, Connecticut, Michigan, Ohio, Oregon and Indiana. Open a state to see its templates. Each state has a board election, a budget approval and an amendment of the governing documents, named the way that state names its documents: CC&R Amendment, Declaration Amendment, Dedicatory Instrument Amendment, Master Deed Amendment, Bylaws Amendment or Governing Document Amendment. California adds Special Assessment, Florida has separate HOA Board Election and Condo Board Election templates, and Massachusetts names its election Trustee Election.

A state template is a starting point that prefills settings. It fills in a question, a quorum and, for some votes, a share of the vote needed to pass, and some state templates turn on sealed ballots. It also selects its state, the kind of community and the kind of election in the Compliance section of Step 3, so that the product checks your settings against the rules it holds for that state. A badge such as **Sets CA compliance** means only that the template selects California for that check. A template does not make an election valid under any law, and its numbers may not match your governing documents. Check each number against them before you publish.

> GOOD TO KNOW
>
> This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

> TIP
>
> To reuse your own setup next time, open a live or closed election, choose its **Settings** tab, and press **Save as template** in the card titled This election. Your saved templates appear under **Your Templates** on the Create page.

Run an election again

To start from an election you ran before, open it and choose its **Settings** tab. In the card titled This election, the first line reads "Run it again. Copies the ballot and its rules into a new draft. You choose the roster, schedule and payment fresh." Press **Duplicate** beside it.

vote.direct shows **Making a copy of your vote...** while it reads the old election, then opens the wizard with the copy. If it cannot read the election, you see **Could not copy that vote**; try again, or start from a template.

The copy keeps the questions, the candidates and their bios, and the rules: how voters get their ballot, verification, ballot secrecy, quorum, proxy voting, weighting, one vote per unit, the information you collect from voters, who sees results, and the state. It does not copy the voter list, the opening and closing dates, the online cutoff, payment, or candidate photos, and the design and reminder plan start from their defaults. The title gets **(copy)** added to the end so you can tell the two apart. Change it to the new title.

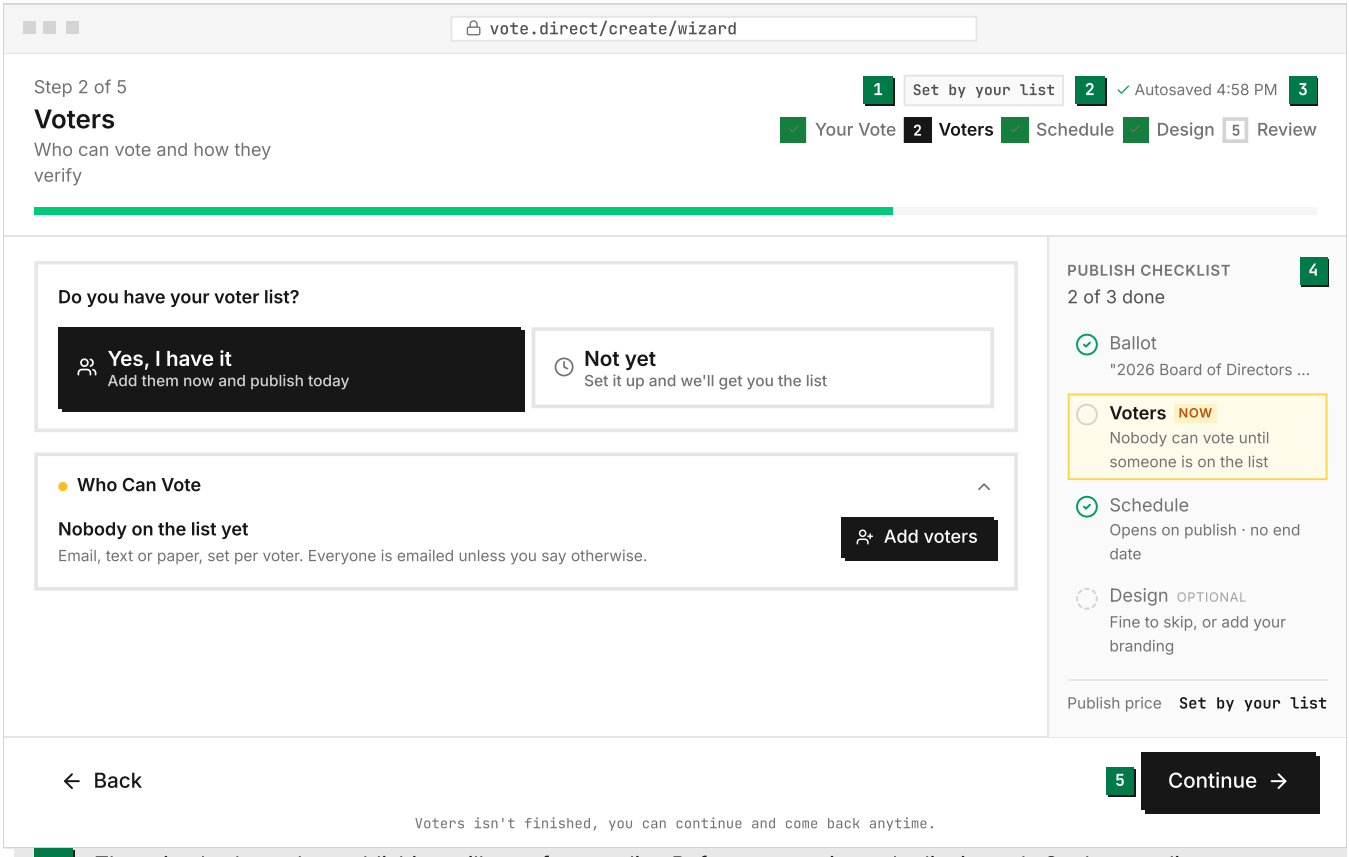
> TIP
>
> Read every question on the copy before you publish. A copy is a new election, and you check it like one.

A published test election offers another way to copy: its **Was this a test run?** card has a **Start it from this ballot** button, which makes the same kind of copy and removes rehearsal words such as Test from the title. See Test, then publish.

Find your way around the wizard

The wizard has five steps. You can move between them in any order and leave a step unfinished to come back to it. Only publishing checks that everything is ready.

Step	Line under its name	What you do there
1. Your Vote	Title and questions	Name the election, describe it, attach any documents voters should read, choose whether voters sign, and write the questions.
2. Voters	Who can vote and how they verify	Add the people who can vote, choose how they get their ballot and how they prove who they are, and set the voting rules.
3. Schedule	When voting runs, results, and access	Set when voting opens and closes, when voters see results, reminders, and the state check.
4. Design	Colors, fonts, and cover image	Choose the look of the ballot and add a header image.
5. Review	Confirm everything, then publish	Check everything, confirm consent for text messages if you send them, then publish or save.



1. The price badge: what publishing will cost for your list. Before anyone is on the list it reads Set by your list.
2. Autosaved and the time: your work is kept in this browser as you type.
3. The step squares. Green with a check means done, black is the step you are on, and a gray number is not ready yet. Press any square to go there.
4. The publish checklist. The row tagged Now or Next is the next thing to finish.
5. Continue always works. The line under it says when the step you are leaving is unfinished.

FIGURE 4.2 The wizard on Step 2 before any voters are added. Ballot and Schedule are done, Voters is next, and Design is optional.

The top of the wizard

- **The step's name. Step 2 of 5**, the step's name, and the line under it.
- **The price badge.** It shows what publishing will cost as you build: **Free** for an election of 25 voters or fewer, **Set by your list** before anyone is on the voter list, **Included in plan** when your plan covers the election, **Custom quote** above 5,000 voters, or the price for your list. The price also shows on the Voters step and again on Review before you pay. See vote.direct/pricing.
- **Autosaved. Autosaved** and the time mean your work is kept in this browser (see Drafts and autosave).
- **The step squares.** A green square with a check means that step has everything publishing needs. The black square is the step you are on. A gray number still needs something; Review stays gray until the whole election is ready. Design always shows a check, because it never blocks publishing. Press any square to go to that step. On a phone the squares become small dots.
- **The green bar.** The thin bar under the header fills as you complete the publish checklist. It is full when the election is ready to publish.

The publish checklist

On a wide screen, a panel titled **Publish checklist** runs down the right side of the wizard. On a phone, and on the Design step, it becomes a bar under the header that reads, for example, **2/3 ready · Next: Voters**. Press the bar to open the list.

The rows are **Ballot**, **Voters**, **Schedule** and **Design**, plus **Final checks** when your election sends text messages. Each row shows a green check when it is done and one line about what is done or what is missing. The first row that still needs work is outlined in yellow and tagged **Next**, or **Now** when it belongs to the step you are on. Design is marked **Optional** and never blocks you. Press a row to go to the step where you fix it.

Under the rows, **Publish price** repeats the price badge. When everything is done, the panel reads **Everything is ready**, and a green **Review & publish** button takes you to Step 5.

The buttons at the bottom

- **Back** goes to the previous step.
- **Continue** goes to the next step. If you left Review to fix one thing, it reads **Back to review** and takes you straight back there.
- When the step you are on is unfinished, a small line under the buttons says so, for example "Voters isn't finished, you can continue and come back anytime." **Continue** still works.
- On Review the buttons change to **Save draft** and one main button. While something is missing, the main button reads **Finish setup:** followed by the next item, for example **Finish setup: Voters**, and takes you to it with a yellow box that lists what is needed. When everything is ready, it reads **Publish Vote**, or **Pay & Publish** when payment is due. Test, then publish explains both. When anyone on your list votes on paper, it reads **Save and set up paper ballots** instead and stands alone; see Test, then publish.
- **Save draft** appears only on the Review step. It stays unavailable until the election has a title.

> KEYBOARD
>
> Press Command and Enter on a Mac, or Control and Enter on Windows, to go to the next step, or to publish from Review. Press Escape to go back a step, unless you are typing in a box.

Step 1: Your Vote

Vote Title is the only required box on this step. Type the name your voters will see, up to 200 characters, for example 2026 Board of Directors Election. A counter under the box shows how many characters you have used, and the election's web address is made from this title when the election is created.

Description (optional) is the text voters read first: the notice, the purpose of the vote, how candidates were nominated. It starts as a plain box that keeps your line breaks. Turn on the **Formatting & photos** switch to add headings, bold text, lists, links and photos; the box becomes a small word processor, and voters see the text exactly as it looks there. A description holds up to 20,000 characters, and formatting counts toward that limit. Near the limit a counter appears. Over it, a red line says how many characters to remove, and the publish checklist waits until you do.

If you turn formatting off again, vote.direct asks first, because headings, bold text, lists, links and photos are removed. Your words stay.

Documents for voters (optional) comes next, for the amendment, a budget, a cover letter or candidate statements that voters should read. Press **Add a PDF** and choose one file or several at once. Each must be a PDF of up to 10 MB, and a ballot carries up to 10 documents. Each one appears in a list with an × to remove it. The files upload when you save or publish, and voters open them from the ballot.

Below the documents is the **Require electronic signature** switch. When it is on, each voter types their full legal name and address and certifies they are the eligible voter before their ballot is cast, and the signature is stored with their ballot. When the ballot also carries documents, each voter must first open every document, read it to the end and confirm they reviewed it, then vote, and sign last. The ballot shows what voters see.

After the election is created, the Ballot card on the election page is where you add or remove documents and change the sender name your voters see.

Below a line, **Questions** lists your questions with a count beside it. A new election starts with one empty Single choice question. Press **Add Another Question** for more; there is no limit on the number of questions. Each question is a card with its own type, choices and settings, explained in full in Ballot questions and voting methods.

The Ballot row of the publish checklist names anything missing, for example **Add a title for your vote** or **Question 1 needs text**.

Step 2: Voters

The Voters step decides who can vote and how. When your list is empty it opens with a question. Below that are five sections that open and close: **Who Can Vote**, **How Voters Get Their Ballot**, **Identity Verification** and, under the heading **Advanced options**, **Voter Information** and **Voting Rules**. A closed section shows a short summary of its settings on the right.

Do you have your voter list?

While nobody is on your voter list, the step opens with **Do you have your voter list?** and two answers:

- **Yes, I have it** (Add them now and publish today). The wizard ends with publishing, as usual. A small link, **Don't have the list yet?**, stays in case you change your mind.
- **Not yet** (Set it up and we'll get you the list). The step then reads **Waiting on the list. That's fine.** You can finish everything else, and the wizard ends with one button, **Save & request the list**, which saves the election to your account instead of publishing it. Nothing is charged until you publish. To change your answer, press **Actually, I have it**.

After you answer **Not yet**, a panel titled **Don't have the list handy?** appears in Who Can Vote. Press **Ask someone for the list** to get a link you can forward to whoever keeps the member list, such as your manager or your secretary. They open it without an account and upload the file or paste the addresses, and the voters land on your list. The link works for 14 days, and vote.direct sends you an email when they upload it. The election needs a title before you can make the link.

> BEFORE YOU PUBLISH
>
> At least one voter is required. An election with nobody on its voter list cannot be published, because it would reach nobody.

Who Can Vote

This section holds your voter list. Its first line counts your voters and how each one gets a ballot, for example **212 voters · 198 by email · 9 by text · 5 by mail**. Press **Add voters** to open the window where you paste addresses or mobile numbers, type people in, upload a spreadsheet, or pick a saved group or contacts. Voters and your roster explains that window and the list in full.

Add voters is unavailable until your election has a title. The first time you press it, vote.direct saves your election to your account as a draft, because the list is kept with the election.

Everyone gets their ballot by email unless your file says otherwise. After you publish, you can switch any voter to text or to a mailed paper ballot on the election's Voters tab. If someone on a free election (25 voters or fewer) is set to get a text, a yellow note titled **Texts need a paid election** explains that they will not be texted, and that you can switch them to links you hand out yourself when you publish, or pay the price of a 26 to 50 voter election for this one and have them texted.

If you are not signed in, this section reads **Voters are added from your account**, with **Create a free account** and **Sign in** buttons. Your ballot stays in this browser while you sign up.

How Voters Get Their Ballot

Choose how your voters first receive their ballot. This is a starting point, not a lock: after publishing, every method stays available, and you can combine them in one election.

Card	What happens
Email invites (marked Recommended)	vote.direct emails each voter a personal, secure ballot link, and you can see who was sent it and who has voted. Reminders go by email. Nothing is sent until you press the send button after publishing.
Print notices yourself	After publishing, you download a PDF with one notice per voter: a QR code and a personal voting code the voter types at `vote.direct/pin`. You print the notices and hand them out or mail them. They open the online ballot; they are not paper ballots.
Share links yourself	After publishing, you download a spreadsheet file (CSV) with each voter's personal link and voting code, to put in a newsletter, a dues statement or your own message. Treat the file like a list of passwords: each link casts that voter's ballot.
Usernames & passwords	After publishing, you download a sheet with a Voter ID and password for each voter. Voters sign in at `vote.direct/signin`.

Every voter still needs a row on your list, even when you print notices or hand out passwords. For someone with no email address, the wizard suggests a placeholder such as `unit-12@your-hoa.invalid`. vote.direct does not email a voter you print for or give a password to unless you choose to.

Text messages are set per voter, for voters with a mobile number. Paper ballots that voters mark by hand and return are set up separately, on the election page's Paper ballots screen, and you can set them up before you publish. See Paper, mail and in-person ballots.

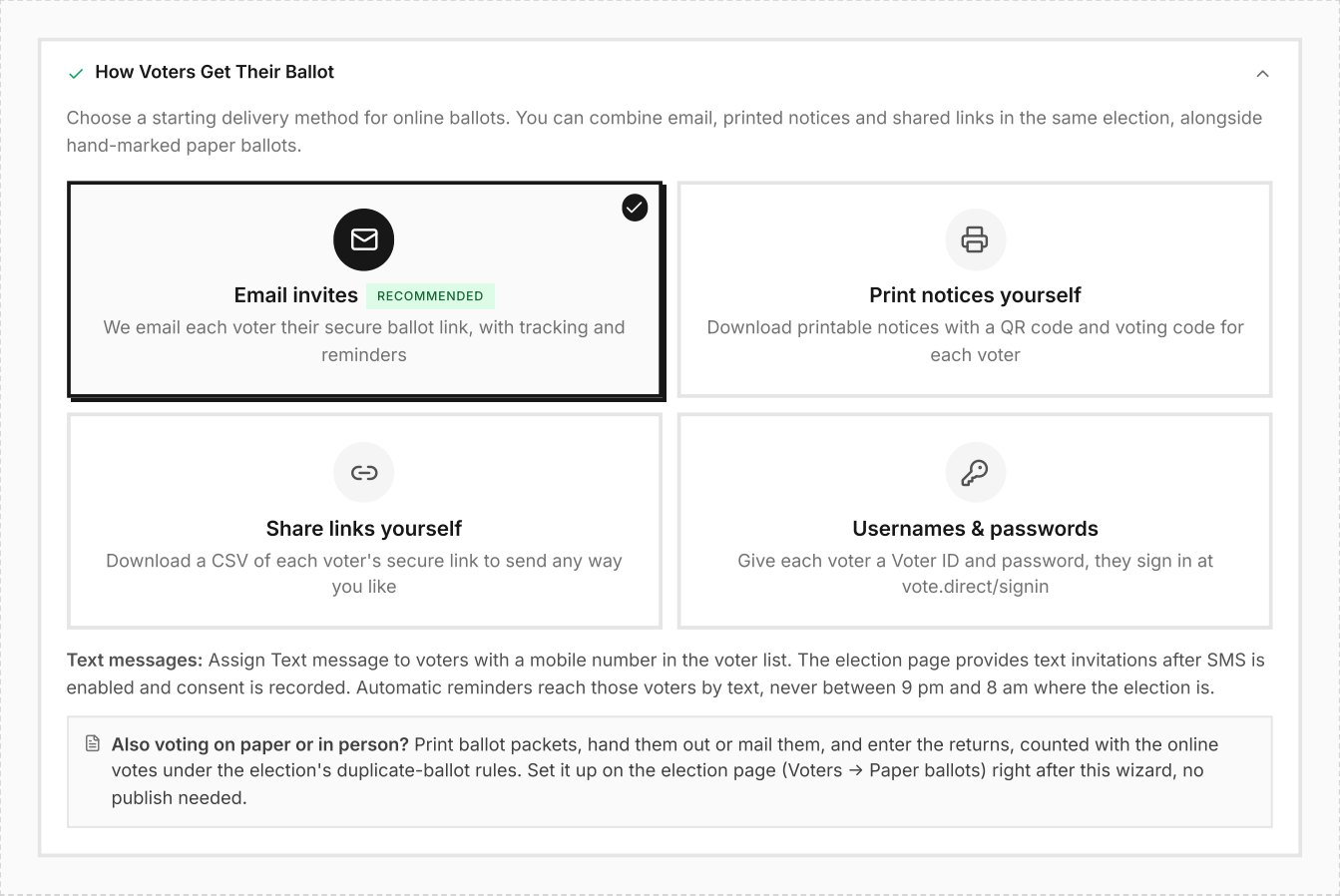


FIGURE 4.3 How Voters Get Their Ballot with Email invites chosen. The choice is a starting point; every method stays available after you publish.

Identity Verification

This section sets how a voter proves who they are before the ballot opens.

- **Email verification** (One-time code sent to email) is always on. Its box is checked and cannot be cleared, with the note **Required for invite-list votes**.
- **SMS verification** (Code sent to mobile number) adds a code sent by text message. It is available on paid elections. On an election of 25 voters or fewer, which is free, it cannot be turned on, and the box says "Free elections send email only. SMS is included with every paid election."
- When SMS verification is on, a yellow note explains that carriers require your organization to already have each voter's permission to text them, that you confirm this on the Review step before publishing, and that vote.direct records your confirmation against your account.

If you add someone who has a mobile number and no email address, SMS verification turns on, and the section says how many voters can only be reached by text.

If you chose **Print notices yourself** or **Usernames & passwords**, a blue note explains that those voters prove who they are with the code or password you give them, so no email or text code is sent to them. The boxes in this section then apply to any voters you also email a ballot link.

Voter Information

These switches, under **Advanced options**, ask each voter for information before they submit. All are off unless you turn them on.

Switch	What your voters are asked
Collect email address	Ask each voter for their email before submitting.
Collect full name	Ask each voter for their name before submitting.
Collect mailing address	Ask each voter for their mailing address before submitting.

With anonymous or sealed ballots, the information you collect is kept on the voter's record and is not shown next to their ballot.

The electronic signature is not here: it is on the first step, under the documents voters read. See Step 1: Your Vote.

Voting Rules

The last section, also under **Advanced options**, holds the rules that shape how the election counts.

Quorum Requirements

A quorum is the minimum participation your rules require for the result to count. Choose **No quorum requirement** (the setting when you start from scratch), **Minimum voter count** or **Minimum percentage**, then type a whole number in the box that appears. With weighted voting or one vote per unit, a percentage is measured against total voting weight, and the box is labeled **Minimum % of total voting weight**. If a count is higher than the number of voters on your list, a red line warns that it can never be reached.

A quorum is not the share of yes votes a measure needs to pass. That is a separate setting on each Yes / No question, described in Ballot questions and voting methods.

Weighted Voting

Weighted Voting gives some ballots more weight than others, for example by shares, ownership percentage or delegates. Pick a number field from your contacts in the list; **No weighting (equal votes)** is the default. Each voter's weight is read from that field, and a voter with no value counts as 1. If you have no number fields yet, the section says so and links to the page where you create one.

One vote per unit

One vote per unit gives one ballot to each unit, lot or household, so co-owners share a single vote. Pick the field that holds the unit; **None: standard voting** is the default. The first co-owner to vote casts the unit's ballot, and the other co-owners are then locked out. If your spreadsheet has a unit column, uploading it can turn this on for you.

Once a unit field is chosen, **Owners of more than one unit** offers three choices:

Choice	What an owner of several units gets
One ballot for all of their units	The default. They vote once, and their answers count for every unit they own.
One email, a ballot for each unit	One invitation naming their units, then a separate ballot for each unit in the same sitting, so they can vote each unit differently.
A separate email per unit	One invitation per unit, each naming its unit in the subject line and opening that unit's ballot alone, so they can vote one now and the rest later.

These choices are hidden when ballots are sealed; sealed ballots keep one ballot for all of an owner's units.

Proxy Voting

The **Proxy Voting** switch (Allow eligible voters to delegate their vote to another voter) is off by default. When you turn it on, **Maximum proxies per holder** appears: a whole number from 1 to 10, set to 3, for how many voters can delegate their vote to a single proxy holder.

Members name a proxy themselves, on their ballot page, once they have confirmed who they are. No vote.direct account is needed. The election page lists delegations in its Proxy Assignments card; see Voters and your roster.

Randomize option order

Randomize option order shows each voter the choices in a different random order, so the first name on the list gains no edge. A voter who returns sees the same order, and results list the choices in your original order.

Ballot secrecy

Ballot secrecy sets how the link between a voter and their ballot is treated. You choose, and the choice locks when the vote goes live.

Identified	Organizers can see who voted and how. For open board votes, roll calls and decisions that must be attributed.
Anonymous	The setting when you start from scratch. Organizers do not see who voted how, in the results, the ballot view or exports. vote.direct keeps the link between a voter and their ballot in restricted storage.
Sealed (permanent separation)	The ballot is stored with no link to the voter at all. Turnout and quorum are visible while voting is open, but nobody, you included, sees a tally until voting closes. Live results are not available, voters cannot change a ballot once cast, and each voter's confirmation code is shown once on screen instead of being emailed.

Most templates set Identified. Choose the setting your governing documents call for.

Privacy protection

With anonymous or sealed ballots, a box titled **Privacy protection** appears with **Minimum votes before showing results**: a whole number from 2 to 100, set to 5. Results and the list of who has voted stay hidden until that many ballots are in, so nobody can work out how the first few people voted.

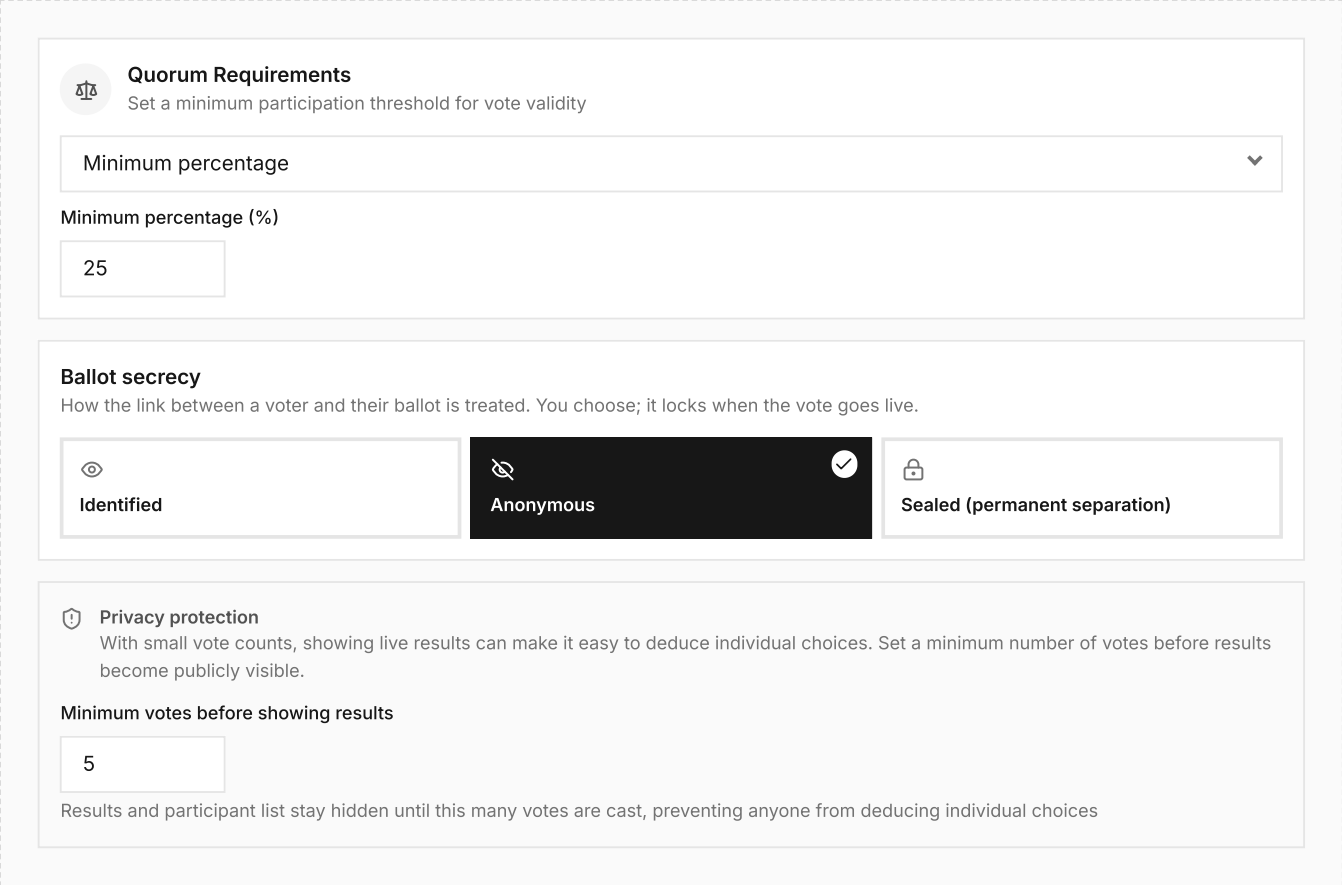


FIGURE 4.4 Part of Voting Rules for the 2026 Board of Directors Election: a 25 percent quorum, anonymous ballots, and the privacy threshold that appears with them.

The price on this step

A panel at the bottom of the step shows what this election costs for the list you have: **Nothing to pay yet** before anyone is on the list, **This election is free** for 25 voters or fewer, a flat rate charged once at publish for a larger list, **Custom pricing for elections this size** above 5,000 voters, or **Included in your plan**. The price for your list appears in that panel and again on Review before you pay. See vote.direct/pricing and Billing and payments.

For a list of 100 voters or more, or one with voters who vote only by mail, a one-line row under the price offers our paid help with running the election; see Managed elections.

Once your list is in and nothing else is missing, a green box reads
Your list is in. This election is ready to go live. It explains that the schedule and design already have working defaults, which you can change later. Its button, **Review and pay** followed by your price, takes you to Review, where you pay and publish.

Step 3: Schedule

A line at the top sums up the schedule, for example **10/19/2026 → 10/30/2026 (12 days)**, or **Opens immediately, closes manually**.

When voting happens

Under **When does voting happen?**, a gray line names the time zone, for example "Times are in America/New York · EDT. Voting opens and closes at these times there."

> GOOD TO KNOW
>
> There is no time-zone picker. The wizard uses your computer's time zone, names it under the heading, and reads every time you type in that zone. Check the zone shown before you set the times.

- **Start immediately** is on by default: voting opens the moment you publish. Turn it off to set **Opens at**, a date and time. If that time has already passed when you publish, voting opens at once, and a yellow line says "This start time has already passed: voting opens as soon as you publish."
- **Closes at (optional)** ends voting at a date and time. Leave it empty to close voting yourself from your dashboard. The close must be in the future and after the opening.
- **Close online voting earlier at (optional)** stops the online ballot before the vote closes, for example when your meeting is called to order. Paper and in-person ballots can still be entered until the vote closes. Leave it empty to close online voting with the vote.

Reminders before the close need a close date. Without one, voters who have not voted get one reminder 3 days after their ballot, or your own reminders counted from the ballot if your plan has any.

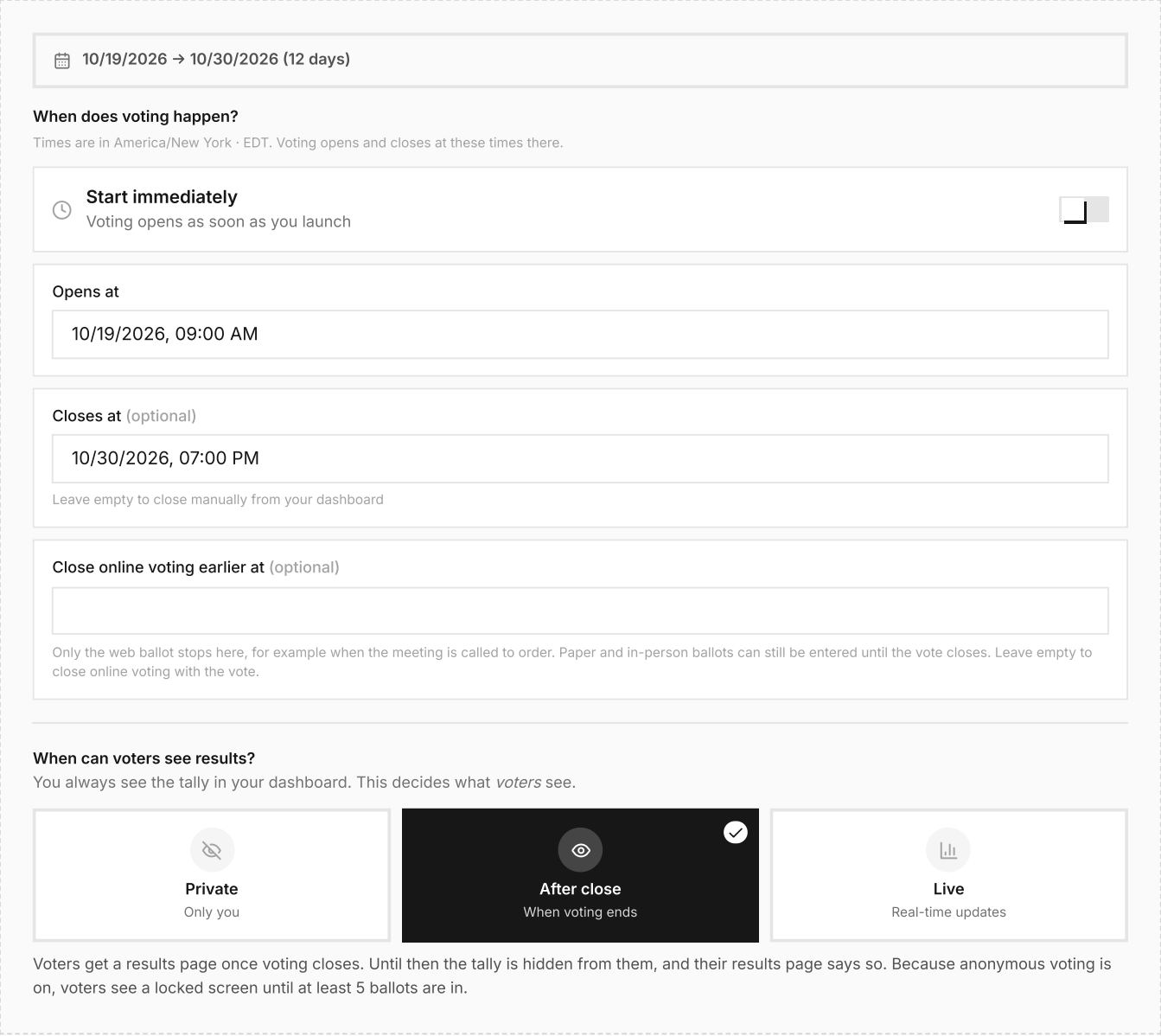


FIGURE 4.5 The top of the Schedule step: voting opens October 19 at 9:00 AM and closes October 30 at 7:00 PM, Eastern time, and voters see results after close.

When voters see results

Under **When can voters see results?**, choose one of three tiles. You always see the tally in your dashboard; this choice decides what your voters see.

Tile	What your voters see
Private (Never shown)	Voters never see a tally, not while voting and not after it closes. Results stay in your dashboard.
After close (When voting ends)	The default. Voters get a results page once voting closes. Until then the tally is hidden from them, and their results page says so.
Live (Real-time updates)	Voters see a running tally while voting is open, which can influence people who have not voted yet. Common for informal polls, unusual for elections.

With anonymous ballots, voters see a locked screen until your privacy threshold of ballots is in. With sealed ballots, **Live** is not available, and nobody sees a tally until voting closes.

When your workspace has a team and voters will not see a running tally, a second question follows: **Who on your team sees results before voters do?** (for a private election, **Who on your team sees results?**). Choose **Owners and admins**, the starting setting, or **Everyone on your team**. You can change it later on the election's **Settings** tab under **Results**, even while voting is open; the election's audit log records the change.

Reminders

Reminders nudge voters who have not voted yet. **Send automatic reminders** is on by default with the Standard plan: 3 days and 1 day before voting closes, at 9:00 AM in the election's time zone. You can choose another plan (Light touch, Thorough or Long election), change the reminders or add more up to six, pick the time of day, and write your own subject line and message. Each reminder shows the moment it is due to go out. Email reminders go only to voters whose ballot email was already sent and who have not voted. Invitations and reminders covers the reminder editor and the messages in full.

The election's web address

Your vote's address explains that every voter gets their own secure ballot link, and that the election also has an address made from its title, such as `vote.direct/v/2026-board-of-directors-election`. That address is included with every election.

Use your own domain lets you run the vote on an address such as vote.yourhoa.org. You set it up on the election page after the wizard: you add two records at your domain provider, and publishing waits until they are verified. A one-time fee applies; see vote.direct/pricing.

The state check

The **Compliance** section lets the product check your settings against the rules it holds for your state. Pick your state from the list. **No state selected (skip compliance check)** is the default, and the list offers California, Florida, Texas, Colorado, Arizona and Nevada. After you pick a state, choose the **Community type** (HOA (Homeowners Association) or Condominium Association) and the **Election type** (Board Election, Budget Approval, Bylaw Amendment, Resolution or Other).

A panel then shows the result: red with a count of violations that must be fixed before publishing, yellow with advisory notices, or green when the check found nothing to flag. Press the panel to see each item, the setting it looked at, a suggested change and the statute it cites. If a red result is still there when you publish, publishing stops and the election is kept as a draft until you change the setting it names. Some states also need an inspector of elections appointed on the election page before you publish; see Inspectors and state rules.

The state, the community type and the election type are set when the election is created and cannot be changed later.

> GOOD TO KNOW
>
> This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

Step 4: Design

Design changes how the ballot looks to your voters. Every election starts with the Vote.Direct design, and this step never blocks publishing.

Choose a design

The step opens on **Choose a Design**, with five groups: **Recommended** (Vote.Direct, marked Popular), **Professional** (Clean White, Corporate Navy, Modern Slate, Executive Dark), **Colorful** (Ocean Gradient, Sunset Warm, Forest Green, Royal Purple), **Minimal** (Paper, Ink) and **Community** (Civic Blue, Neighborhood). Each card draws a small ballot with your own title and first question. Press a card to choose it; a check marks your choice.

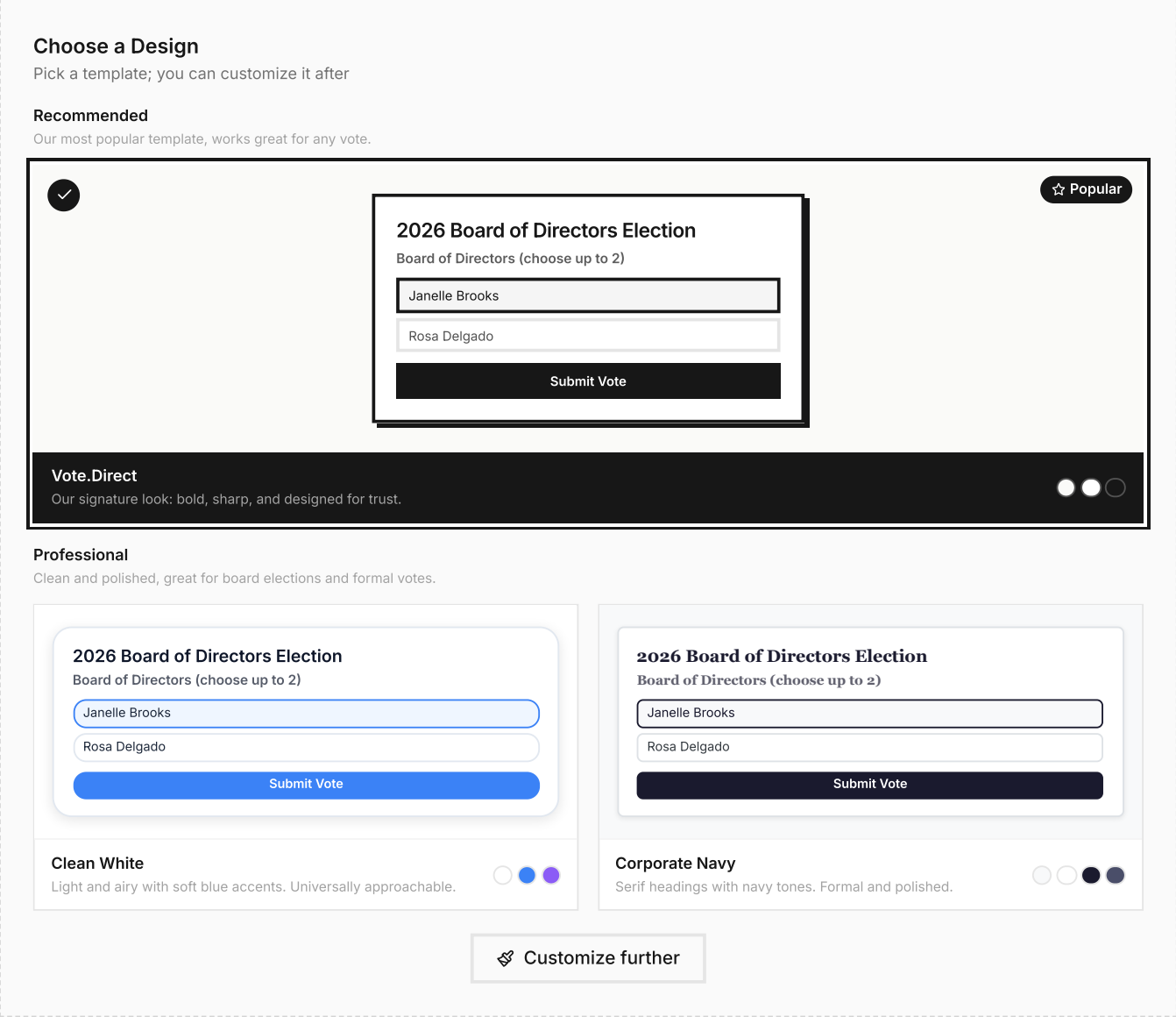


FIGURE 4.6 Choose a Design with the Vote.Direct design selected. Each card draws your own title and first question in that design.

Customize further

Press **Customize further** for the full editor. Settings sit on the left, and a **Live Preview** of your ballot sits on the right, with buttons for a desktop view and a phone view. **Back to templates** returns to the cards. Two tabs at the top of the settings, **BASIC** and **ADVANCED**, divide the controls.

The **BASIC** tab has five parts:

- **Templates**: the same designs, as a row of small tiles.
- **Brand Match**: pick or type one or two brand colors and press **GENERATE THEMES** to get four designs built from them, named Clean, Bold, Elegant and Dark. Press one to use it.
- **Accent Color**: seven color squares and a custom color picker. The accent changes buttons and highlights without changing the rest of the design.
- **Typography**: four fonts, each shown with your title: Inter, Poppins, Playfair Display and your device's own system font.
- **Images**: **Header Image** (16:9 recommended) adds a picture across the top of the ballot; after you choose a file, a **Crop Header Image** window lets you frame it. **Background** fills the page behind the ballot card.

The **ADVANCED** tab opens detailed settings in three groups: Style (Background, Colors, Typography), Components (Buttons, Cards, Poll Options) and Advanced (Layout, Animations). **Reset** returns a changed design to the template you started from.

> GOOD TO KNOW
>
> Images are not autosaved. They stay in this browser window until you save or publish. If you reload the page or come back later, choose them again.

Step 5: Review

Review shows everything in one place before you publish.

Vote Summary

The **Vote Summary** card has three parts. Each has an **Edit** link that opens the step where you change it.

- **Your Vote.** The title, the description as voters will see it, the number of questions, the design, whether you added a cover image, the documents voters will read, and the electronic signature when you require one.
- **Voters. Invite list only**, how ballots are sent, the number of voters, how they are contacted when your list mixes email, text and mail, the verification, the ballot secrecy, and anything you collect from voters.
- **Schedule.** When voting starts and ends, the online cutoff, who sees results and, when set, the randomized order, the quorum, proxy voting, weighting, the state and the reminder plan.

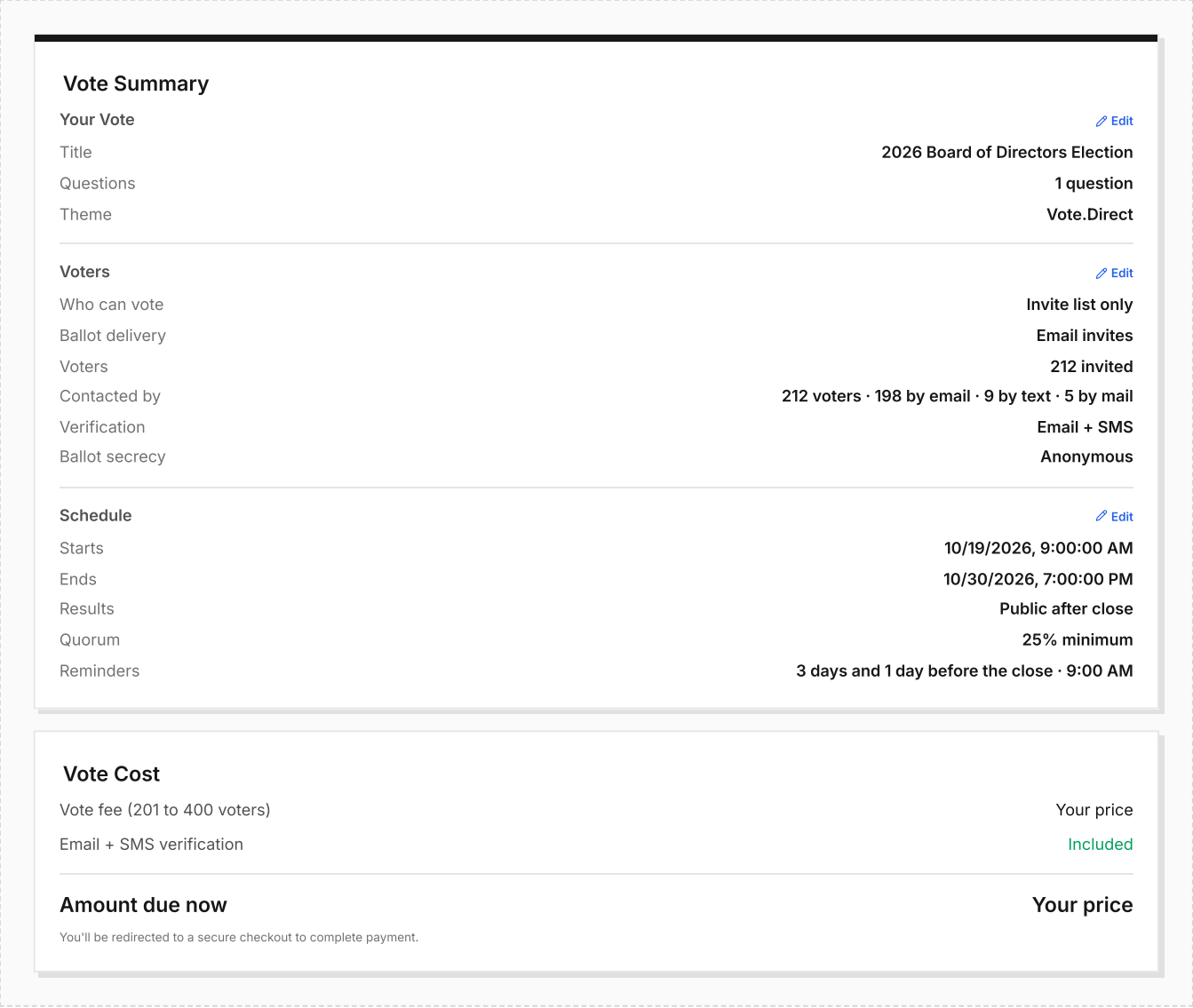


FIGURE 4.7 The Vote Summary and Vote Cost cards for the 2026 Board of Directors Election. The real fee and the amount due for your list appear where this figure says Your price.

Configured voter experience

This card lists, in numbered steps, what your voters will go through with the settings you chose: how the ballot reaches them, how they verify, how many questions they answer and when they see results. Read it as one of your voters would.

What it costs

Below the summary, a card shows the cost of publishing. For a priced election, **Vote Cost** lists the fee for your list's size band, **Email + SMS verification** as Included, and **Amount due now**. A line underneath says how you pay: from your prepaid balance, or on a secure checkout page. An election of 25 voters or fewer shows **Free**. If your plan covers the election, the card reads **Included in your plan**. Above 5,000 voters it reads **Custom setup required** with a link to ask for a quote. With nobody on your list yet, the card reads **Add your voter list to publish** instead, because nobody can vote until someone is on the list: **Add voters now**

takes you back to the Voters step and **Finish later** saves a draft. If someone else has the list, answer **Not yet** on the Voters step and the wizard ends at **Save & request the list**. The amounts for your list appear on this card; see vote.direct/pricing and Billing and payments.

When a price is due, more boxes may appear: one suggesting a free test before you pay, and one describing our offer to beat a lower quote from another provider. Test, then publish explains the free tests, and Billing and payments explains the offer.

Consent to text your voters

If your election sends text messages, a card titled **Confirm you have consent to text these voters** asks you to tick a box. By ticking it you confirm that every voter you are about to text gave your organization prior consent to receive election messages at the number on file, that you are authorized to act for your organization, and that you are responsible for honoring opt-out requests, and you accept the SMS Messaging Terms. Publishing waits until the box is ticked, and vote.direct records your confirmation against your account with the date. If you already confirmed consent when you added text voters, the box is ticked for you. If you are not sure you have that consent, turn SMS verification off on the Voters step and use email verification instead.

Ready to publish

At the bottom, a green box reads **Ready to publish** and says how publishing will be paid, or a yellow box asks you to pay first and explains that you go to a secure checkout page and that the election publishes when your payment goes through. If your voters get their ballots by email, a blue note reminds you that the next screen has one button to email everyone their secure ballot link, and that nothing goes out until you press it.

Then press **Publish Vote** or **Pay & Publish** at the bottom right, or **Save draft** to finish later. When anyone on your list votes on paper, the one button is **Save and set up paper ballots**. Test, then publish explains what happens next.

Drafts and autosave

The wizard keeps your work in two ways.

- **Autosave** keeps your progress in this browser as you type, and the header shows **Autosaved** with the time. It lasts 24 hours, and only in this browser on this computer; another computer or browser does not see it.
- **Save draft**, on the Review step, saves the election to your account, where you can open it from any device under Drafts on your dashboard.

Autosave does not keep pictures or files: the cover image, the background image, candidate photos and the documents for voters. Choose them again after a reload. A candidate card names any photos you need to add again, and the first step names any documents.

When you come back to the wizard within 24 hours, it asks **You have an unfinished draft**, shows the title and when it was saved, and offers **Continue Draft** or **Start Fresh**. **Start Fresh** discards the unfinished election. Your dashboard also shows a banner, **You have an unfinished draft**, with a **Continue Editing** button. Pressing × on that banner discards the unfinished election from this browser.

vote.direct also saves your election to your account as a draft on its own the first time you press **Add voters**, when you ask someone for the list, and when you press **Finish setup** on Review while something is still missing. That way your work is not lost if you leave, and you find it under Drafts. When you save or publish, the

election you saved replaces that draft.

After **Save draft**, an election with voters on its list opens the Draft saved page; one with an empty list opens its own election page, where you add voters and publish once they are in; and one with voters on paper opens its Paper ballots page, where you choose who prints, mails and counts them before publishing. A saved election is edited on its election page, not in the wizard. See Test, then publish.

What you can change after publishing

Most settings stay editable while an election is a draft or is scheduled to open. Once voting opens, the ballot is fixed.

When	What you can change
Draft, or scheduled to open	The questions and choices, the voter list, the schedule and the settings, on the election page.
Live (voting open)	The close date and the online cutoff, closing early, reminders, the sender name and the supporting document. The questions, the choices and the other ballot settings cannot change, and ballot secrecy is locked.
Closed	Nothing.
From the moment it is created	The state, the community type and the election type cannot be changed.
Once it is paid for	The verification cannot be changed. To change it, cancel the election for a refund and create a new one.
Once paper ballots are generated	The ballot is locked until you void the paper ballots on the Paper ballots screen.

> BEFORE YOU PUBLISH
>
> Read the ballot once more as a voter would. A free test ballot shows you exactly what your voters will receive; see Test, then publish.

CHAPTER 5

Ballot questions and voting methods

Write each question on your ballot, choose how it is answered and counted, and know what the results will show for it.

IN THIS CHAPTER

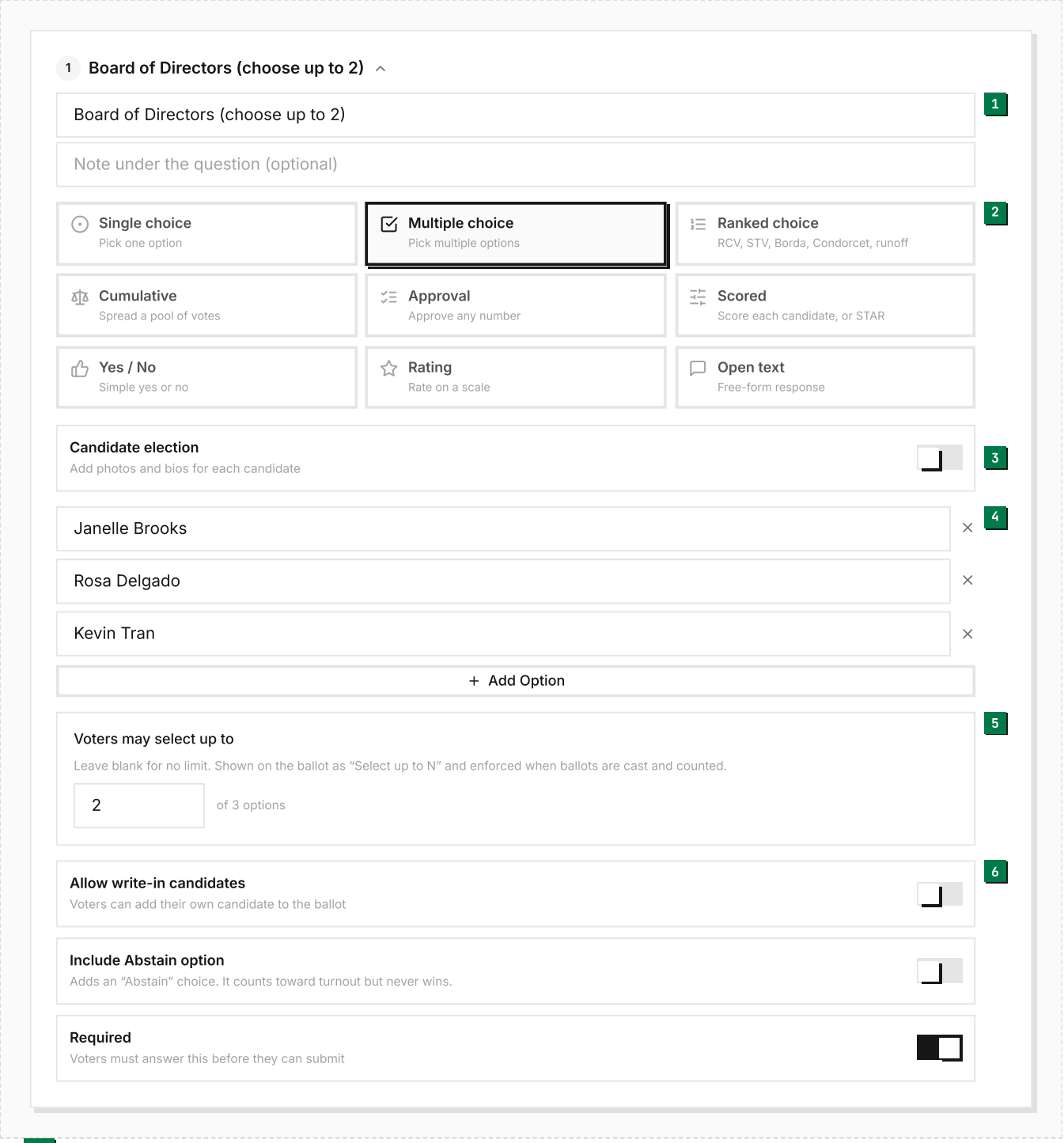
- The question card
- The nine question types
- Choices and candidates
- Settings for each type
- Write-ins, Abstain, Required and contact fields
- Counting methods
- Seats, winners and ties
- What the results show for each method
- Choosing a method

The question card

Every question on Step 1 of the wizard is a card. The same card is used when you edit the ballot later in the Ballot card on the election page, so everything in this chapter applies there too, until voting opens.

From top to bottom, a card has:

1. The header: the question's number and its text (or Question 1 until you type), with an arrow that folds the card away. A trash can appears when the ballot has more than one question; press it to delete this one.
2. **What would you like to ask?**: the question itself. Under it, **Note under the question (optional)** adds a line of up to 2,000 characters that voters see under the question.
3. Nine tiles, one for each question type. The tile with the black border is the type you chose.
4. The choices, for the types that have them, and the **Candidate election** switch.
5. Settings for the chosen type.
6. Switches for write-ins and Abstain where the type allows them, then **Required**.
7. **Map to contact field**, when your organization keeps custom fields on its contacts.



1. The question, and an optional note voters see under it.
2. The nine type tiles. Multiple choice is chosen.
3. Candidate election adds a photo and a bio to each choice.
4. The choices, two to ten.
5. The setting for this type. On Multiple choice it is also the number of seats.
6. Write-ins, Abstain and Required.

FIGURE 5.1 The question card for the 2026 Board of Directors Election: a Multiple choice question with three candidates, where each voter picks up to two.

A card with a problem turns red and says what is wrong, for example **Question text is required** or **Add at least 2 options**. The Ballot row of the publish checklist names the same problems until you fix them.

The nine question types

Choose a type by pressing its tile. The ballot your voters see changes with it.

Tile	Line on the tile	What voters do	Typical use
Single choice	Pick one option	Pick one choice.	One seat, or one choice among several.
Multiple choice	Pick multiple options	Pick several choices, up to the limit you set. The ballot shows, for example, Select up to 2.	Several seats on one ballot.
Ranked choice	RCV, STV, Borda, Condorcet, runoff	Put the candidates in order of preference. A line under the question says how the ranking is counted.	One seat decided by runoff or head-to-head, or several seats by transfer or points.
Cumulative	Spread a pool of votes	Spread a set number of votes across the candidates, all on one or split.	Director elections that use cumulative voting.
Approval	Approve any number	Mark every candidate they approve of. The ballot says Select every candidate you approve of.	Elections that let members support several candidates equally.
Scored	Score each candidate, or STAR	Give each candidate a score from 0 up to the top you set, or leave a candidate unscored.	Score voting, or STAR with its automatic runoff.
Yes / No	Simple yes or no	Answer Yes or No, and Abstain if you add it.	Motions, budgets, amendments and assessments.
Rating	Rate on a scale	Pick a number on a scale.	Gathering opinions, not electing anyone.
Open text	Free-form response	Type an answer.	Comments and suggestions.

Yes / No questions get their Yes and No answers automatically. Rating and Open text have no choices. When you change a question to one of these three types, its choices are cleared.

If the question has candidates with bios or photos, changing it to a type without a candidate list asks first, for example **Change this question to Yes / No?**, because the candidates, their bios and their photos are removed and do not come back if you change the type again. Press **Keep the candidates** to leave the question as it was.

Choices and candidates

Single choice, Multiple choice, Ranked choice, Cumulative, Approval and Scored questions need at least two choices. A new question starts with two empty rows, labeled Option 1 and Option 2 in gray. Press **Add Option** for another row, up to 10 choices per question; the button disappears at 10. Press the × beside a row to remove it, as long as at least two rows remain.

Candidate election: photos and bios

Turn on **Candidate election** (Add photos and bios for each candidate) to give each choice a photo and a statement. The choices you already typed become the first candidates. Each candidate is a card with:

- **Photo**: press the square and choose a picture (JPEG, PNG, GIF or WebP, up to 10MB). Point at a photo to show **Replace** and a button that removes it; on a phone they always show.
- A name box, labeled Candidate 1 name in gray until you type.
- A bio box for a statement of up to 2,000 characters, with a counter under it. Line breaks are kept.

Press **Add Candidate** for another card, up to 10 candidates per question. Press the × at the top right of a card to remove it, as long as at least two remain.

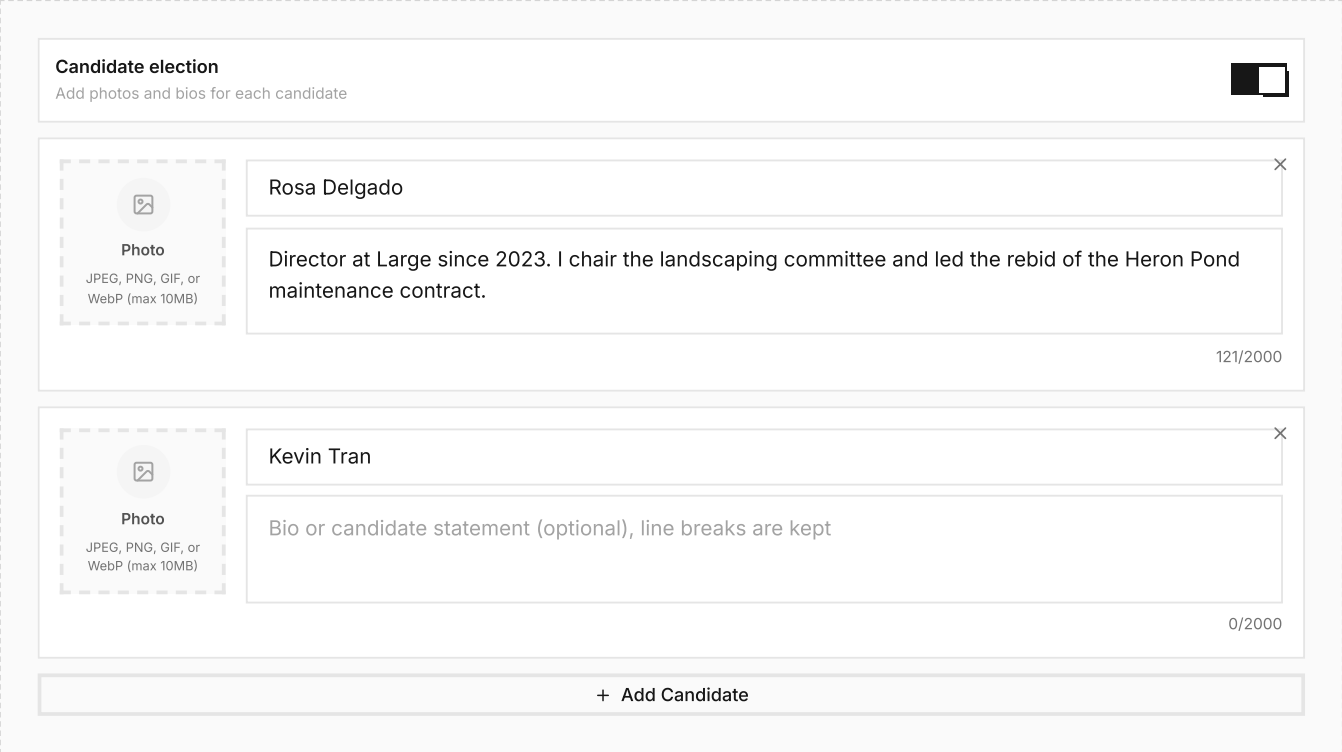


FIGURE 5.2 Candidate election turned on. Each candidate gets a photo square, a name and a bio of up to 2,000 characters.

> GOOD TO KNOW
>
> Candidate photos are not autosaved. A photo stays in this browser window until you save or publish. If you reload the wizard, the names and bios come back but the photos do not, and the question card names the candidates whose photo you need to add again, for example "One photo needs adding again: Rosa Delgado." Choose those photos again before you save.

Turning **Candidate election** off keeps the names but removes every bio and photo. If any candidate has a bio or a photo, vote.direct asks first (**Turn off candidate election?**), and the removed bios and photos do not come back if you turn the switch on again. Press **Keep candidate election** to leave it on.

Placeholder names

Templates fill in sample rows such as Candidate 1, Candidate 2 and Candidate 3. vote.direct treats a row that reads Candidate followed by a number, Option followed by a single letter (such as Option A), or Choice followed by a number as a placeholder.

- When a question has at least two real choices, leftover placeholder rows are dropped when you publish. They never reach your voters.
- When it has fewer than two real choices, the publish checklist asks you to fix it: "Question 1: replace the placeholder names (e.g. "Candidate 1") with real choices, or delete the rows you don't need."

Settings for each type

Multiple choice

Voters may select up to sets the most choices a voter can pick. Leave it blank for no limit. The ballot shows Select up to 2, and the limit is enforced when ballots are cast and counted. The number cannot be more than the number of choices, and a gray note beside it says, for example, of 3 options.

On a Multiple choice question this number is also the number of seats: with up to 2, the two candidates with the most votes win. Left blank, the question fills one seat.

Cumulative

Each voter gets a pool of votes to spread across the candidates however they like: all on one candidate, or split among several. **Votes per member** sets the pool. It is 3 when you choose the type, and it must be at least 2. **Seats to fill** sets how many candidates win; the highest vote totals take the seats when voting closes.

When the election uses weighted voting or one vote per unit, a switch appears above the pool: **Multiply the pool by each voter's entitlement**. When it is on, the box is renamed **Votes per unit or share**: each voter gets that many votes for every unit or share they hold, and the minimum becomes 1. For a board election, set it to the number of seats. The card then works the arithmetic through, for example "A member holding 1,000 shares gets 2,000 votes to spread across candidates."

Ranked choice

Voters put the candidates in order. **Counting method** sets how the rankings decide the result: "Voters rank candidates the same way under every method. The method decides who wins." The ballot looks the same under every method, and voters see one line under the question that explains how it is counted.

Instant runoff, Condorcet and the contingent vote always elect one winner. Single transferable vote and Borda count fill several seats and add **Seats to fill**. Three methods add a choice of rulebook, each starting on the default named first: **Counting rules** for STV, **Cycle rule** for Condorcet and **Point scale** for Borda. Every method and rulebook is listed under Counting methods.

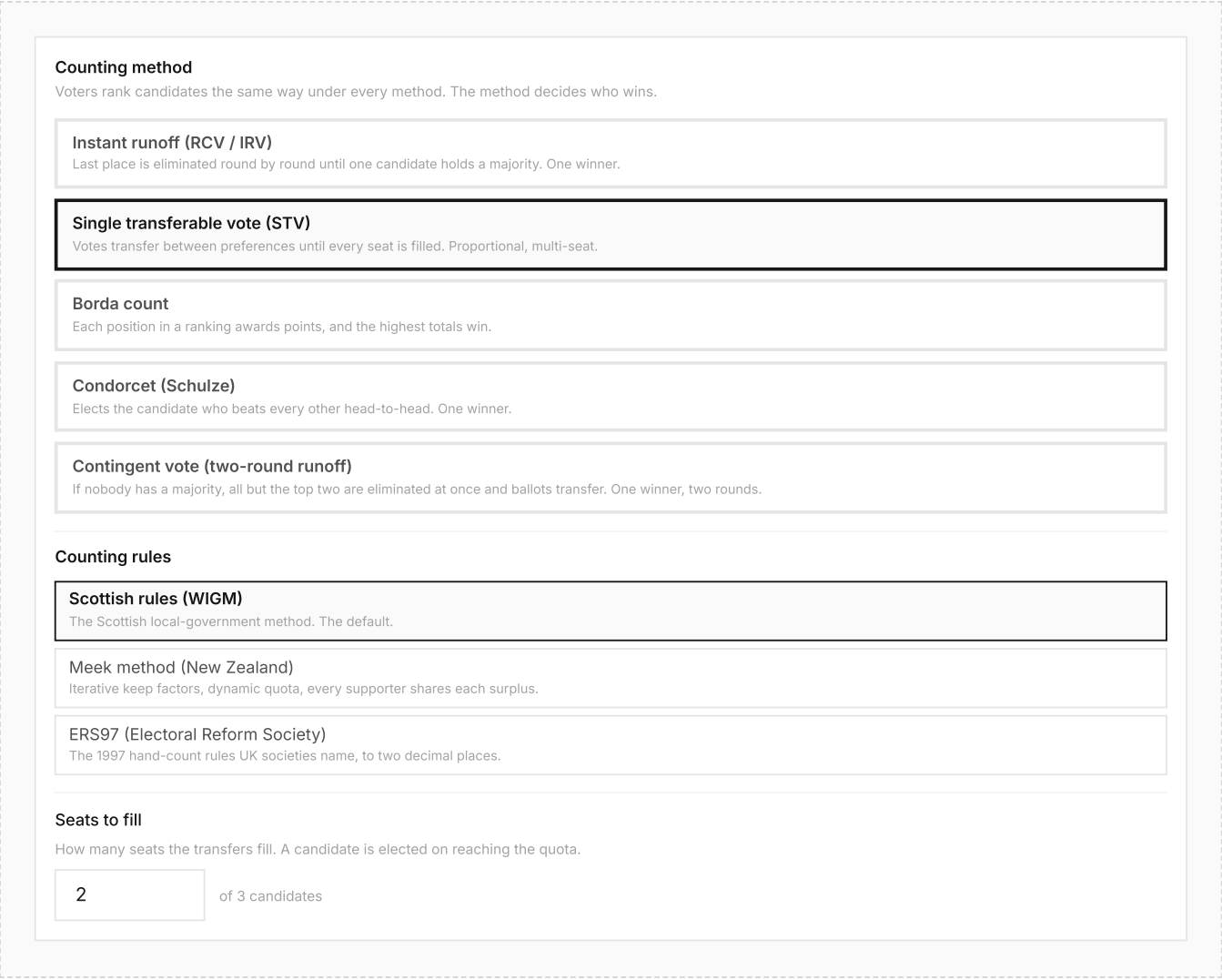


FIGURE 5.3 The settings of a Ranked choice question counted by single transferable vote under the Scottish rules, for two seats.

Approval

Voters mark every candidate they approve of, with no limit. **Seats to fill** sets how many of the most-approved candidates win.

Scored

Voters score each candidate independently, from 0 up to the **Scale top** you set: from 2 to 10, starting at 5. The ballot says "Score each candidate from 0 to 5" and "Leave a candidate unscored to skip them." Skipping a candidate gives them no points; scoring them 0 counts against their average. The highest point totals win, and **Seats to fill** sets how many.

Turn on **Automatic runoff (STAR)** to finish with a runoff: after scoring, the two highest totals go to a runoff decided by how many voters scored one above the other. STAR always elects one winner, so **Seats to fill** disappears while the switch is on.

Yes / No and the share needed to pass

Yes and No are provided for you. Turn on **Include Abstain** to add a third answer, Abstain.

Require a set share to pass sets the share of the vote the measure must win. It is off unless you turn it on, and it starts at two-thirds of the votes cast. Choose one of:

- **Simple majority**: more than half.
- **Three-fifths (60%)**, **Two-thirds (66.7%)** or **Three-quarters (75%)**.
- **Custom**: type a percentage from 1 to 100 in the box marked % needed.

Under **Measured against**, choose **Votes cast** (of the members who voted; abstentions are not counted either way) or **All eligible voters** (of everyone on the list, whether they voted or not, which is a harder bar). A line at the bottom states the rule in words, for example "To pass, this needs two-thirds of votes cast."

> GOOD TO KNOW
>
> The share needed to pass is separate from quorum. Quorum, on the Voters step of the wizard, asks whether enough members voted at all. The share needed to pass asks how many of them said yes. A measure can meet one and miss the other.

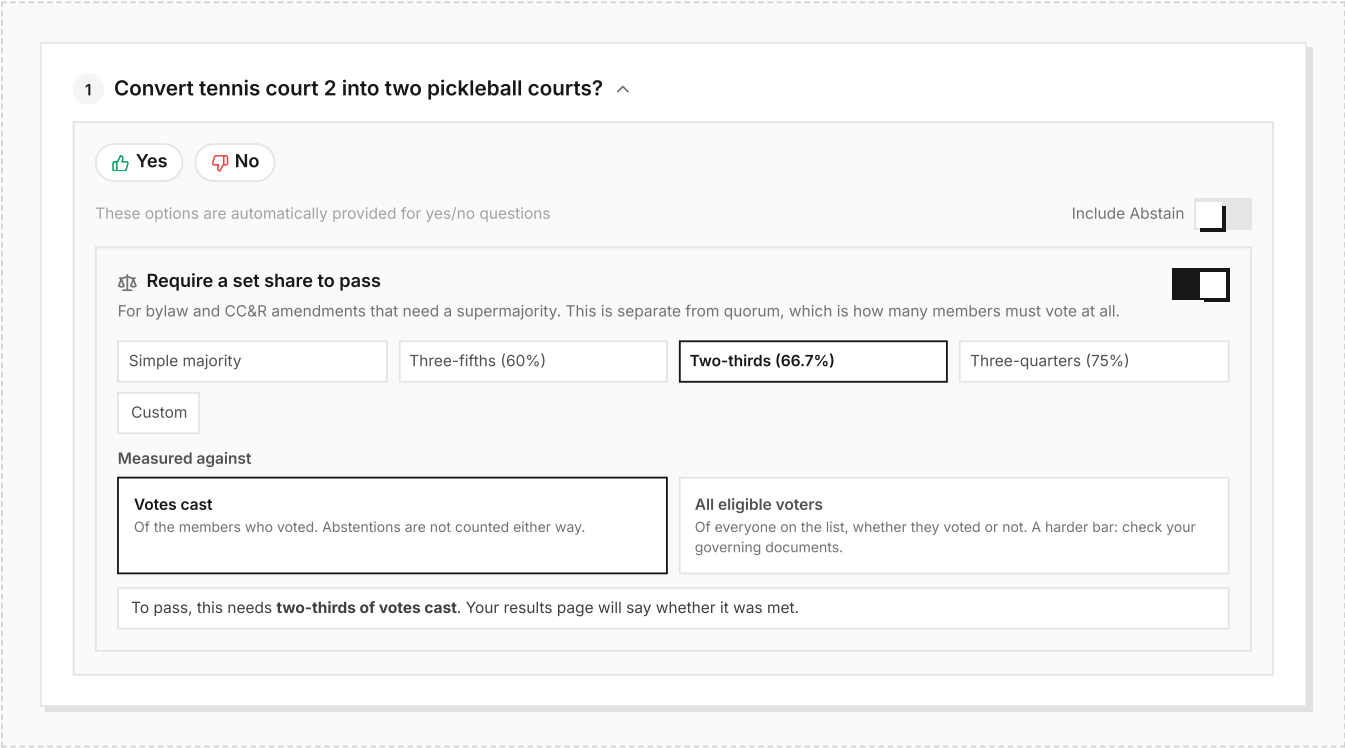


FIGURE 5.4 A Yes / No question with a two-thirds share required to pass, measured against the votes cast. The question's text box and type tiles are left out.

After voting closes, the results show **Carried** or **Did not carry**, with the share of yes votes and the share required. While voting is open they show **Passing so far** or **Not yet at the threshold**, and **Not yet determined** appears until a ballot is counted. When a measure falls short, a line says how many more votes in favor were needed. Every result carries the line "A count of the ballots recorded, not a legal determination that the measure is validly adopted."

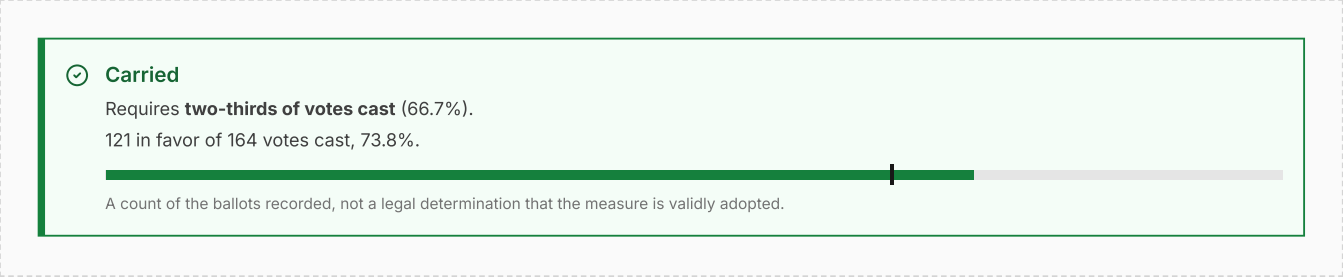


FIGURE 5.5 The result of the pickleball courts proposal with a two-thirds rule: 121 of the 164 votes cast said yes, 73.8 percent, so the measure carried. The black mark on the bar is the share required.

Rating

Min (1 to 10, starting at 1) and **Max** (2 to 10, starting at 10) set the scale. **Low label** and **High label** add optional words for each end, such as Poor and Excellent. Results show the average rating.

Open text

Placeholder text sets the gray hint in the answer box, and **Max characters** sets the longest answer, from 50 to 5,000, starting at 2,000. An Open text question starts as not required, so a voter can skip it. Results count the written answers; you read them in the CSV export.

Write-ins, Abstain, Required and contact fields

Write-in candidates

Allow write-in candidates (Voters can add their own candidate to the ballot) is available on Single choice, Multiple choice, Cumulative and Approval questions. On the ballot, voters press **Add write-in candidate** and type a name. **Write-ins per voter** sets how many names one voter can add:

- Single choice: one write-in per voter.
- Multiple choice: up to the **Voters may select up to** number, because write-ins count toward it.
- Cumulative: up to the size of the pool, because each write-in costs at least one vote from it.
- Approval: up to 10.

The most is 10 in every case. In the results, write-in names that differ only in capital letters or spacing are counted together, and a write-in candidate can win.

Abstain

Include Abstain option adds an Abstain answer to Single choice, Multiple choice and Approval questions; Yes / No has its own **Include Abstain** switch. An abstention counts toward turnout but never wins. Once Abstain is on for a question and your ballot has more than one question that can take it, a link under the switch reads **Apply to all 3 questions** (with your number). Press it to turn Abstain on for all of them; the link then reads **Abstain applied to all 3 questions**.

Required

Required (Voters must answer this before they can submit) is on for every type except Open text. Turn it off to let voters skip the question. On the ballot, a required question is tagged **Required**.

Map to contact field

When your organization keeps custom fields on its contacts, **Map to contact field** opens a list labeled **Save answer to contact field**. Pick a field, and each voter's answer is saved to that field on their contact record when they submit. Leave it on None to save nothing. Closing **Map to contact field** again removes the link to the field. If the fields cannot be loaded, a yellow bar above the questions reads **Could not load contact fields. Tap to retry.** Press it to try again.

Counting methods

This table lists every way vote.direct counts a question, with the name and the line shown in the wizard. In a weighted election, each ballot counts with the voter's weight under every method. On a Cumulative question whose pool is multiplied by each voter's entitlement, the weight is already in the pool, so it is not applied a second time.

Method	How it decides	Winners
Single choice	The choice with the most votes wins.	One
Multiple choice	The choices with the most votes win, one per seat.	The Voters may select up to number
Instant runoff (RCV / IRV)	"Last place is eliminated round by round until one candidate holds a majority. One winner." A majority means more than half of the ballots still counting in that round.	One
Single transferable vote (STV)	"Votes transfer between preferences until every seat is filled. Proportional, multi-seat." Counting rules: **Scottish rules (WIGM)**, the Scottish local-government method and the default; **Meek method (New Zealand)**, iterative keep factors and a dynamic quota, so every supporter shares each surplus; **ERS97 (Electoral Reform Society)**, the 1997 hand-count rules UK societies name, to two decimal places.	Seats to fill
Borda count	"Each position in a ranking awards points, and the highest totals win." Point scale: **Classic points (N−1, N−2, ...)**, where first place earns the number of candidates minus one, the default; **Dowdall (1, ½, ⅓, Nauru)**, where harmonic points reward first preferences far more. A candidate a voter left unranked earns nothing from that ballot.	Seats to fill
Condorcet (Schulze)	"Elects the candidate who beats every other head-to-head. One winner." When the head-to-head results form a cycle, the Cycle rule decides: **Schulze (beatpath)**, the most widely deployed rule and the default; **Ranked pairs (Tideman)**, which locks victories from the largest margin down; **Minimax**, where the smallest worst head-to-head defeat wins.	One
Contingent vote (two-round runoff)	"If nobody has a majority, all but the top two are eliminated at once and ballots transfer. One winner, two rounds."	One

Method	How it decides	Winners
Cumulative	Each candidate's votes are added up across the pools voters spread. The highest totals win.	Seats to fill
Approval	The candidates approved by the most voters win.	Seats to fill
Scored	The highest point totals win.	Seats to fill
Scored with Automatic runoff (STAR)	"After scoring, the two highest totals go to a runoff decided by how many voters scored one above the other. Single winner."	One
Yes / No	Counts Yes, No and Abstain. With a share needed to pass, the result says whether Yes reached it.	Not applicable

On a ranked ballot, voters see one of these lines under the question: "Counted by instant runoff: the last-place candidate is eliminated round by round until one holds a majority." "Counted by single transferable vote: your vote transfers between your choices until every seat is filled." "Counted by Borda points: each position in your ranking awards points, and the highest totals win." "Counted head-to-head: the winner is the candidate who beats every other in one-on-one comparison." "Counted as a two-round runoff: if no candidate holds a majority, all but the top two are eliminated at once and your vote moves to whichever of them you ranked higher." When a question fills more than one seat, the line adds, for example, "2 seats will be filled."

Seats, winners and ties

How many winners a question has depends on its type:

- Multiple choice: the **Voters may select up to** number. Blank means one seat.
- Approval, Scored (without STAR) and Cumulative: **Seats to fill**.
- Ranked choice: **Seats to fill** under single transferable vote and Borda; one seat under instant runoff, Condorcet and the contingent vote.
- Single choice, STAR and Yes / No: one.

Seats to fill cannot be more than the number of candidates; the box stops at that number, and beside it a gray note says, for example, of 3 candidates. If you delete candidates afterwards, the publish checklist says so, for example "Question 1: 3 seats but only 2 candidates, add candidates or lower the seat count."

While voting is open, the results mark front-runners **Leading**; nobody is a winner until voting closes. After the close, winners are marked **Winner**. On a question with more than one seat, a line reads, for example, "This question fills 2 seats, 2 winners elected."

Ties

vote.direct never picks a winner at random. It does not draw lots or flip a coin. Instead:

- When candidates are level during a count but every way of breaking the tie leads to the same result, the count goes on and says so, for example "Candidates finished level for elimination. Every possible order was counted, and each one elects the same winner."

- When a tie decides who wins, the result marks the candidates **Tied** and does not award the seat. It says the tie has to be resolved under your association's bylaws, and on a question with several seats it counts the seats that are undecided.
- With several seats, candidates above a tie for the last seat win outright. Only the seat the tie blocks stays open.

Resolve a tie the way your governing documents say, whether that is a runoff, a coin toss or something else, and keep a note of how you did it with your election records.

What the results show for each method

Every question's results start with a bar for each choice and its count. On a ranked question the bars show first preferences, and the **Winner** badge comes from the counting method, not from the longest bar. Below the bars, each method adds its own detail, on your dashboard and on the voters' results page whenever counts are shown. Close, results and the record covers the results pages in full.

Method	Detail under the bars
Instant runoff	**Elimination rounds**: each round's totals, who was eliminated, how many ballots moved to whom, the majority needed and the ballots set aside with no remaining choice. It appears when the count needed more than one round.
Single transferable vote	**Transfer stages**: the quota, each stage (first preferences, surpluses transferred, candidates excluded), who was elected at which stage, and the votes exhausted.
Borda count	**Borda point count**: a table of Candidate, Points, 1st choices and Ranked by.
Condorcet	**Head-to-head results**: a grid where each cell is the number of ballots preferring the row candidate over the column candidate, and a line that names the winner or explains how the cycle rule decided.
Scored	**Score totals**: a table of Candidate, Total points, Average and Scored by.
STAR	The **Score totals** table, with the **Winner** badge on the candidate who won the runoff. The runoff itself is not drawn.
Contingent vote	No extra detail: the bars and the **Winner** badge.
Yes / No with a share needed to pass	The **Carried** or **Did not carry** box shown earlier in this chapter.
Single choice, Multiple choice, Approval, Cumulative	The bars and **Winner** badges, plus the seats line when more than one seat is filled.
Rating and Open text	The average rating with a bar for each value, or the number of written answers.

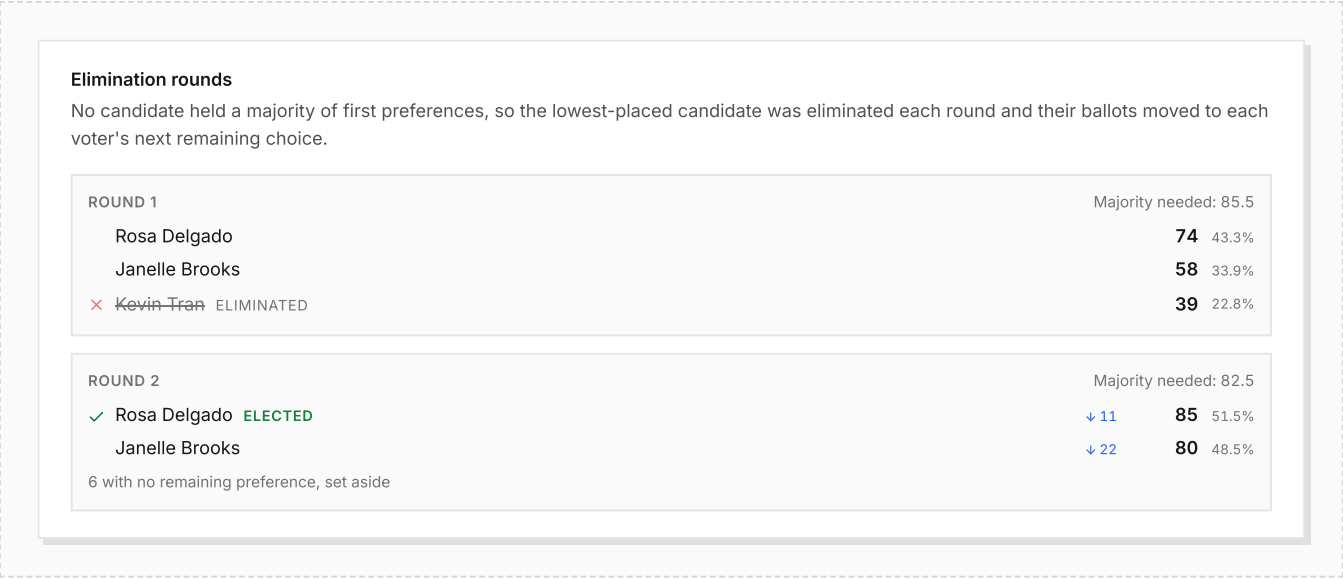


FIGURE 5.6 An example, not the sample election's real count: the same three candidates counted for one seat by instant runoff, with 171 ballots. Kevin Tran is eliminated in round 1; 11 of his ballots move to Rosa Delgado, 22 to Janelle Brooks, and 6 rank neither.

Choosing a method

Your governing documents decide how your organization votes. This table matches common wording to the setting that does the same thing. When in doubt, follow your documents and ask whoever interprets them for your board.

If your documents say	Use
Each member votes for one candidate, and the most votes wins	Single choice.
Each member votes for as many candidates as there are seats	Multiple choice, with **Voters may select up to** set to the number of seats.
Members may cast all their votes for one candidate or spread them (cumulative voting)	Cumulative, with the pool set to the number of seats. Turn on **Multiply the pool by each voter's entitlement** if votes count per unit or share.
Ranked ballots; eliminate the lowest until someone has a majority	Ranked choice, **Instant runoff (RCV / IRV)**.
Ranked ballots; the top two go to an instant runoff	Ranked choice, **Contingent vote (two-round runoff)**.
Single transferable vote for several seats	Ranked choice, **Single transferable vote (STV)**, with the rulebook your documents name.
Points by position in a ranking	Ranked choice, **Borda count**, with the point scale your documents name.
The candidate preferred over each other candidate one-on-one	Ranked choice, **Condorcet (Schulze)**, with the cycle rule your documents name.

If your documents say	Use
Members may approve as many candidates as they like	Approval.
Members score each candidate, or STAR voting	Scored, with **Automatic runoff (STAR)** for STAR.
Approve or reject a motion, a budget or an amendment, by a stated share	Yes / No, with **Require a set share to pass** set to the share and the basis your documents state.

> TIP
>
> Before you publish, send yourself a free test ballot to see the question exactly as your voters will. See Test, then publish.

CHAPTER 6

Voters and your roster

Your voter list decides who can vote and how each person gets a ballot. This chapter covers the Voters tab, adding and importing voters, units and weights, fixing and removing entries, and People, the contact book behind every list.

IN THIS CHAPTER

- The Voters tab
- The Voter List
- Add voters
- Import a spreadsheet
- Units, weights and co-owners
- Proxy voting
- Roster checks
- Remove voters
- Ask someone else for the list
- People: your contact book

The Voters tab

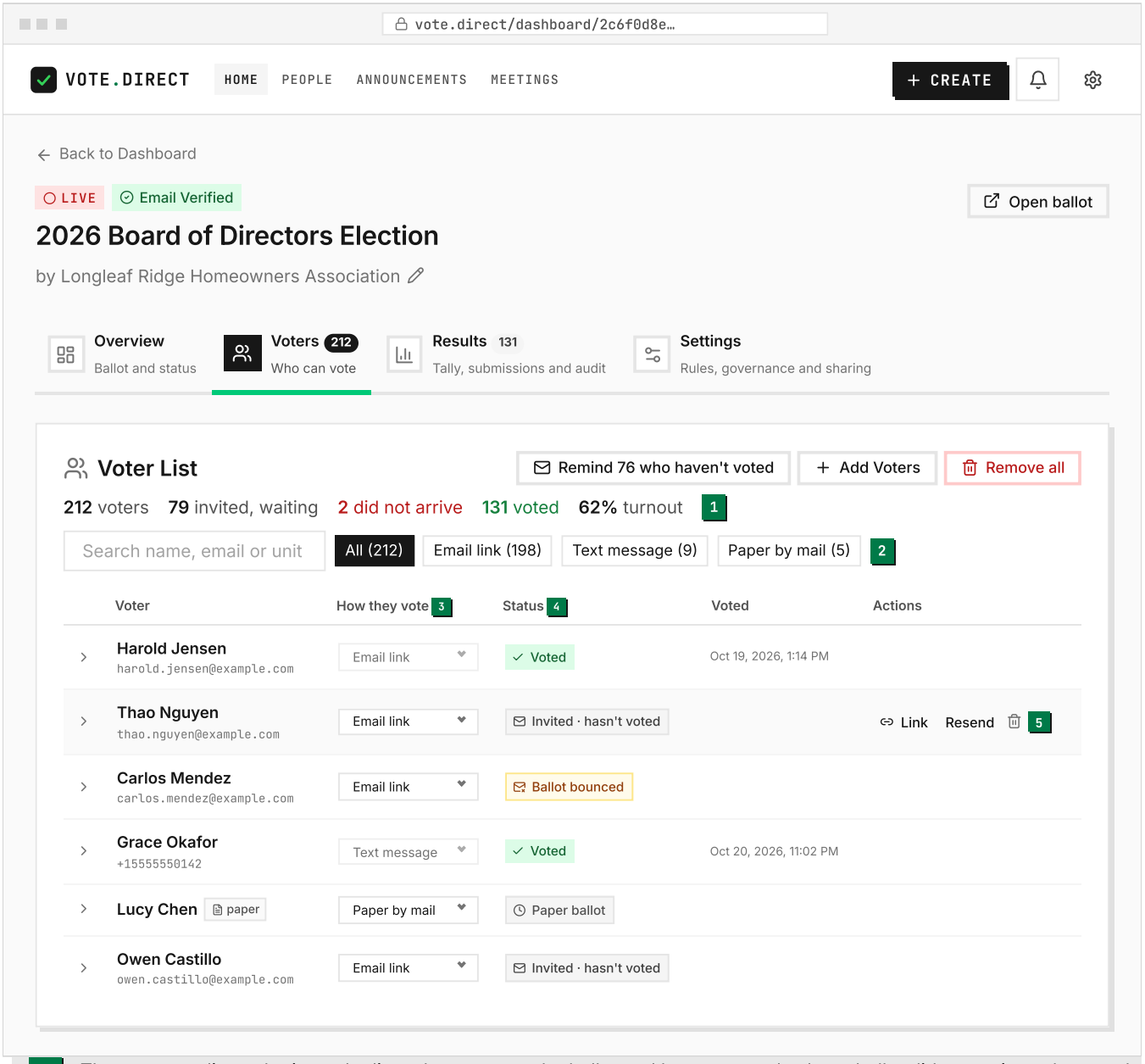
Every election you build in vote.direct has a voter list, also called the roster: the people allowed to vote. Only people on the list can vote. Open the election from your dashboard and four tabs sit under its title:

- **Overview**: ballot and status.
- **Voters**: who can vote. A count beside the label shows how many people are on the list.
- **Results**: tally, submissions and audit. It appears once the election is published.
- **Settings**: rules, governance and sharing.

The Voters tab holds everything about the people and how they are reached. From top to bottom, a live election shows:

1. **Reach voters in more than one way**: a summary of how many voters get email, a text or a paper ballot. Hidden once the election is closed.
2. **Text voters the link**: only when the election sends text messages and is scheduled or live.
3. **Distribute ballots yourself**: here when you hand out printed notices, links or sign-in sheets yourself, or when anyone votes with a printed voting code. Otherwise it waits further down.
4. **Reminders**: the automatic reminder plan. See Invitations and reminders.
5. **Units with more than one address** and **Voters with no {field}**: roster checks, only when they find something.
6. **Voter List**: the list itself.
7. **Paper ballots**: when anyone on the list votes on paper. See Paper, mail and in-person ballots.
8. **More ways to deliver ballots and help voters**: a fold-out panel with the delivery tools this election is not using yet, and **Voter rescue**.
9. **Proxy Assignments**: when proxy voting is on.

Who can change the list: the person who created the election, and teammates whose role is owner, admin or editor. Other teammates can open the list but cannot change it or send anything. See Team and roles.



1. The summary line: who is on the list, who was sent the ballot and has not voted, whose ballot did not arrive, who voted, and turnout.
2. Search, and one chip per way of voting when your list mixes them.
3. How each person gets and casts a ballot. Locked once they have voted.
4. Each voter's status, in words. Point at a badge to read what it means.
5. Row actions appear when you point at a row.

FIGURE 6.1 The Voters tab of a live election halfway through voting: 131 of 212 have voted, and two ballots bounced.

The Voter List

The Voter List card shows everyone on this election's list, oldest addition first.

Buttons at the top

Button	When it shows	What it does
Send to {n} unsent	The election is scheduled or live, someone set to get email has never been sent the ballot, and the yellow banner below is not already offering the same button.	Emails the ballot to everyone on email who was never sent it. See Invitations and reminders.
Remind {n} who haven't voted	The election is scheduled or live and someone on email was sent the ballot and has not voted.	Sends a reminder email now. Addresses that bounced are left out when it sends.
Add Voters	Always.	Opens the Add voters window.
Remove all	Anyone is on the list and the election is not closed.	Clears the list after you type DELETE. See Remove voters.

On a phone the labels shorten to **Send ({n})**, **Remind ({n})**, **Add** and **Clear**.

The summary line

{n} voters	Everyone on the list.
{n} not sent	People set to get email who have never been sent the ballot.
{n} not texted	People set to get a text who have never been texted the ballot.
{n} invited, waiting	Sent the ballot, not voted yet.
{n} did not arrive	The email service reported that their ballot bounced, was blocked or was marked as spam. These people are also counted in "invited, waiting".
{n} voted	Ballots received, online and on paper.
{n}% turnout	Voted divided by everyone on the list, rounded.
{n} need details	People whose way of voting is missing something it needs, such as a mobile number for a text. Press it to show only those people.

People who vote on paper or with a printed code are never counted as "not sent" or "waiting", because vote.direct never emails or texts them.

Banners above the list

When you deliver by email and some people have never been sent the ballot, a banner explains it:

- On a draft, in gray: **{n} voters on the roster: nothing sent yet**, with "Invitations go out when you send them after publishing. Nobody is emailed automatically."
- On a live or scheduled election, in yellow: **The ballot has not been sent to {n} voters**, with a button **Send to {n} unsent** (or **Send the ballot now** for one person). If nobody has been invited yet it says "Nobody has been invited yet. Adding people to the roster does not email them: send the ballot when you are ready." Otherwise it says "Voters added after publishing are not emailed automatically. Send them the ballot so they can vote."

If you hand out ballots yourself (printed notices, a links file or sign-in sheets), a gray line says you deliver these ballots yourself, and an **Also notify by email** button lets you use email for the people set to get it. When anyone votes on paper, a line says how many and that "Their ballots are tracked on the Paper ballots page."

Search and filters

The search box reads **Search name, email or unit**. It searches name, email, unit, mobile number and mailing address. The chips beside it filter the list: **All**, **Needs details** (when anyone needs a detail), and one chip per way of voting when your list mixes them, each with its count. If nothing matches you see "No voters match" followed by your search.

Columns

Column	What it shows
Voter	Name, with the email or mobile number underneath. Chips mark a paper voter ("paper"), a voter who votes at the meeting ("meeting"), and anything missing, such as "needs mailing address".
How they vote	A menu to choose each person's way of voting. See the next section.
Unit and Weight	Only on an election that counts one vote per unit or weights its ballots. For people who vote online they fill in when the person votes: the units the ballot covered and the weight it carried. For paper voters they show the entry's own unit and weight.
Status	A badge in words. The full list is below.
Sent	When the ballot was first emailed. Shown on wide screens when you deliver by email.
Voted	When the ballot was received.
Actions	Buttons for that row.

> GOOD TO KNOW
>
> The times in the Sent and Voted columns, and in a voter's full record, are shown in UTC (Coordinated Universal Time) without a label. In October, UTC is four hours ahead of Eastern Daylight Time, so a ballot cast at 9:14 AM EDT shows as 1:14 PM.

How they vote

Each person on the list has one way of getting and casting a ballot. People added with an email address start on email unless your spreadsheet says otherwise, people with only a mobile number start on text, and people with only a mailing address start on paper by mail. Change it in the **How they vote** menu on the row.

Choice	How the person votes	What the entry needs
Email link	Gets a personal voting link by email.	An email address.
Text message	Gets a personal voting link by text.	A mobile number. The election must send texts, which needs your consent statement and a paid election. See Text your voters.
Paper by mail	Gets a printed ballot packet by mail and returns it. Staff enter it.	A mailing address with street, city, state and ZIP.
Paper at the meeting	Marks a paper ballot at the meeting. Staff enter it.	Nothing more.
Voting code	Votes online with a printed code you hand them, for example at a shared device.	Nothing more.

- **Email link** cannot be chosen for someone with no email address.
- The menu is locked once the person has voted.
- If you pick a way of voting whose detail is missing, the row opens its edit form so you can type it in, and the row shows a yellow "needs" chip until you do.
- If you switch someone to **Text message** and you have not yet confirmed consent to text that person, a window asks you to confirm it. If the election does not send texts yet, it says texting will be turned on. The button is **Turn on texting**. If you decline, the person stays as they were. The consent statement is quoted in Text your voters.
- If a change cannot be saved, the menu goes back to the old choice and no message appears. Check the row after you change it.
- People on **Paper by mail**, **Paper at the meeting** and **Voting code** are never emailed or texted by vote.direct, including by reminders.

Row actions

On a computer most row actions appear when you point at the row. A **Send** button for someone never sent the ballot is always visible.

Action	When it shows	What it does
Add details	The row is missing a detail its way of voting needs.	Opens the edit form.
Text / Text again	A text voter on a scheduled or live election, who has not voted.	Texts this one person their link. See Text your voters.

Action	When it shows	What it does
Link	Online voters.	Copies this person's own ballot link. The note on the button says they confirm by email, and points you to Printable notices or the Links CSV for a code that works without email.
Send / Resend	Email voters who have not voted, on a scheduled or live election.	Emails the ballot to this one person.
Trash can	Anyone who has not voted, unless the election is closed.	Removes them from this election.

Paper and code voters show a dash in place of email actions. On a phone each person is a stacked block, with an **All details** link to open the full record.

A voter's full record

Press the arrow at the start of a row to open the full record: Name, Email, Mobile, Mailing address, Unit, Vote weight (on weighted elections), How they vote, Status, Ballot sent and Voted. Two buttons sit under it: **Edit details** and **Remove from roster**.

Edit details opens a form with Name, Email, Mobile, Mailing address, Unit and, on weighted elections, Vote weight. Labels marked in yellow name what this person's way of voting still needs. Press **Save details** to keep the changes.

- The email address is shown but cannot be changed. It identifies the entry. To correct an address, remove the person and add them again with the right one.
- Mobile numbers need digits with an area code. If the number cannot be read you see "That mobile number could not be understood. Use digits with an area code."
- A change that would leave the person with no way to be reached is refused: "This change would leave the voter with no way to be reached. Add an email, mobile number or mailing address first."
- Once the person has voted, a new Unit or Vote weight is refused: "This voter has already voted, and their ballot counts with the unit and weight they had then. You can't change those now." Their other details can still be changed.
- When your election counts one vote per unit, the Unit of someone with an email or mobile number cannot be left empty: "This election gives one vote per unit, so every voter needs a unit. Type their unit, or remove them from the voter list."
- When your election weighs ballots by a number field, the Vote weight of someone with an email or mobile number cannot be left empty: "Type the weight this voter's ballot should carry. A voter with no weight counts as 1, so type 1 for that."
- When a voter's weight comes from their units, a Vote weight is refused: "This election counts one vote per unit, so a voter's weight comes from the units they hold. Change their unit instead."

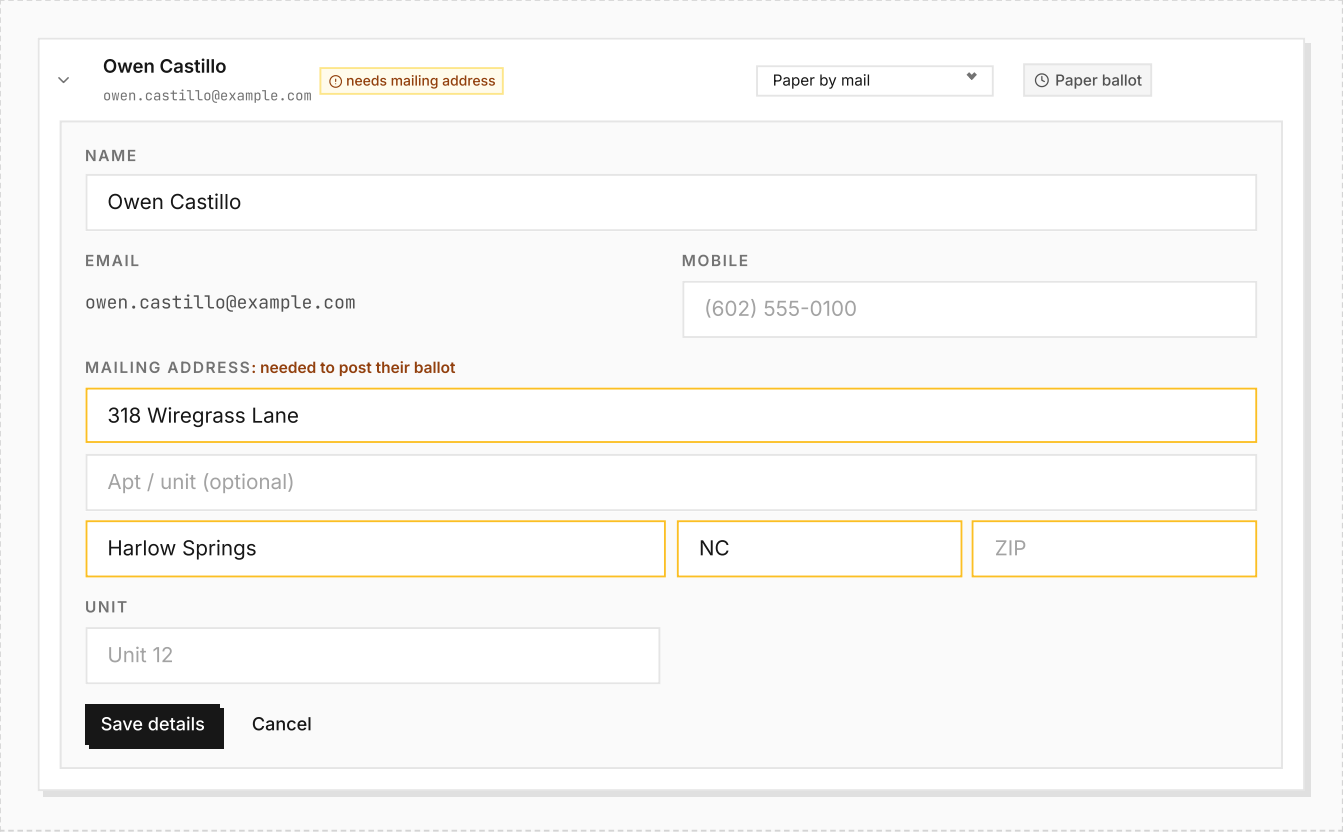


FIGURE 6.2 Owen Castillo switched to Paper by mail. The form opens on its own and marks the address fields a mailed ballot needs.

> **UNITS AND WEIGHTS ON THIS LIST**
>
> When your election counts one vote per unit, the Unit you save here is the unit this person's online ballot counts for. When it weighs ballots by a number field, the Vote weight you save here is the weight their ballot carries. Both are saved on the person's contact record in People, which is where online ballots read them, so the change also reaches your other elections that read the same field, for anyone who has not voted in them yet. A paper ballot made for the person after the change uses it too. On an election that counts neither, the Unit and Vote weight are notes on the list. For someone who votes online, the list fills in their unit and weight when they vote; to see them before then, open the person in People. See Units, weights and co-owners.

Status badges

The badge on each row says where that person stands. Point at it to read the explanation shown in the table below. When the email service gave a reason for a failure, it appears under the explanation as "Reported reason".

Badge	What it means
Not sent	This voter has not been sent the ballot yet.
Not texted	This voter has not been texted the ballot yet. Text the link from the Voters tab.

Badge	What it means
Invited · hasn't voted	They were sent the ballot and have not voted yet.
Not voted yet	You deliver this ballot yourself; status shows only whether they voted.
Voted	Ballot received.
Paper ballot	This member votes on paper; see Paper ballots.
Votes at the meeting	They mark a paper ballot at the meeting; staff enter it on Paper ballots.
Voted (paper)	Paper ballot received and counted.
Has a voting code	They vote online with a printed code you hand them; nothing is emailed.
Ballot bounced	Their mail server rejected the ballot, so it never arrived. Fix the address and send again, or switch them to a paper ballot.
Ballot blocked	Their mail server refused the ballot. Ask them to allow mail from us, use a different address, or switch them to a paper ballot.
Marked as spam	They reported the ballot as spam, so we will not email them again for this election. Reach them another way.
Delivery delayed	The mail service is retrying delivery. This usually clears within a few hours; no action needed yet. When the reason says the mailbox is full, the note asks you to have them free up space or reach them another way.

What to do about a failed email is in Bounced and failed emails.

Add voters

You can open the **Add voters** window from several places:

- **Add Voters** at the top of the Voter List, or **Add your first voters** when the list is empty.
- The yellow notice "You haven't added voters to" your election, shown on the election's other tabs until someone is on the list. Its button is **Add voters**.
- **Add voters** on the page you see right after publishing.
- **Add voters or import addresses** on the Paper ballots page.
- **Add voters** in the wizard's **Who Can Vote** section. See Ask someone else for the list for the wizard's other choices.

The window says: "Type someone in, paste a list, drop in a spreadsheet, pick a saved group, or choose from your contacts: they are added to this election and saved to your contacts for next time." Five tabs sit across the top: **Paste**, **Type in**, **File**, **Groups** and **Contacts**. You can use more than one before you press the button; the people from every tab are added together.

You can drop a spreadsheet anywhere on the window, whatever tab is open. A dashed outline says "Drop the member list" and "Excel or CSV: we read the columns for you."

Paste

Paste a list of email addresses or mobile numbers. The help line says: "Any list works: one per line, or separated by commas or spaces, straight from a spreadsheet, a document or your email client. Names and header rows are sorted out for you. Mobile numbers work too, for members with no email address."

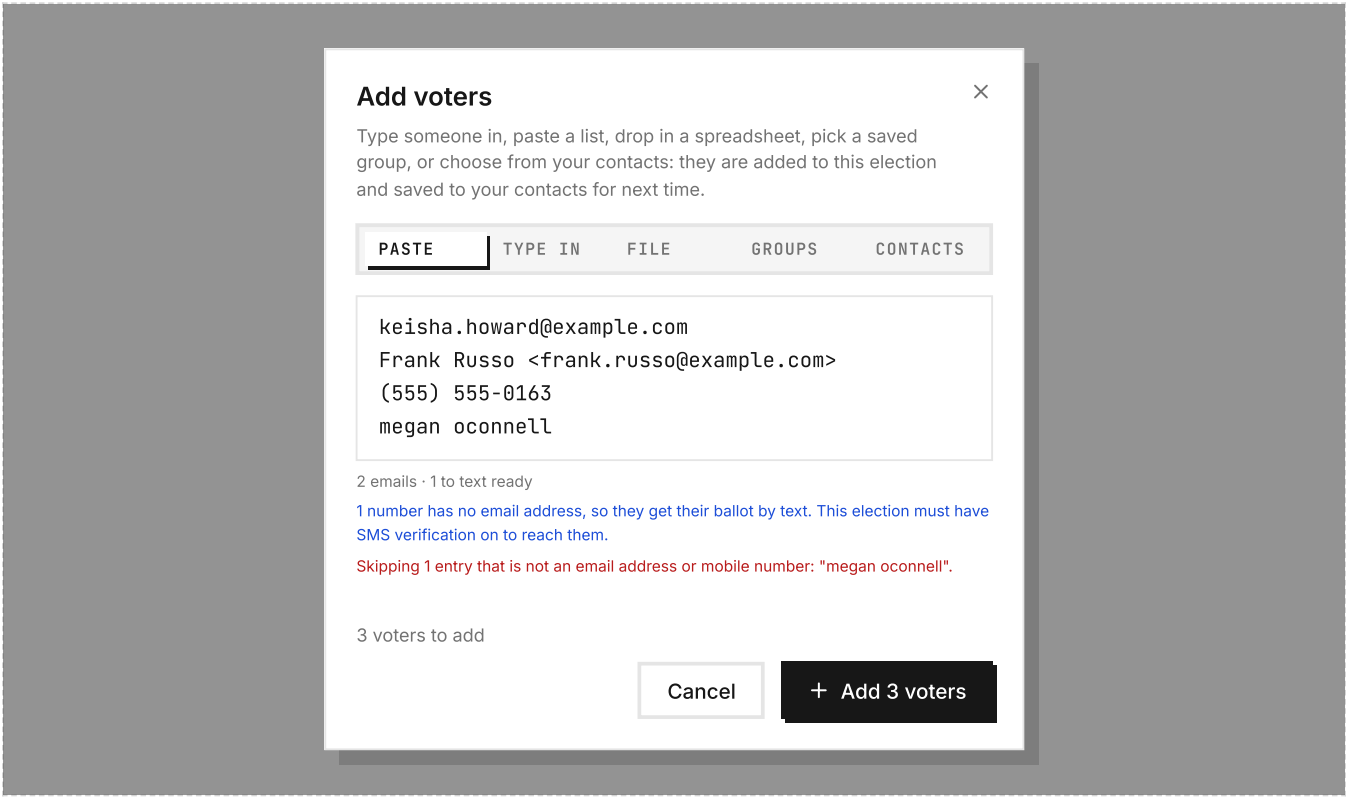


FIGURE 6.3 A paste with two addresses, one mobile number and one line that is neither. The window says exactly what it will add and what it skips.

How a paste is read:

- Each line that holds an email address adds that address. A name written with it, as in `Frank Russo <frank.russo@example.com>`, is not kept: the person is added by address only. To keep names, use Type in or a spreadsheet.
- A mobile number on the same line as an email address is not kept either. The person is added as an email voter.
- A line with a mobile number and no email adds a text voter. A number is read when it has 10 digits, 11 digits starting with 1, or a plus sign and a country code. Unit numbers and ZIP codes are not mistaken for phone numbers.
- A line that is neither is skipped and named in red, so you can see what was left out.
- Repeats are merged: "{n} duplicates in your paste were merged."

Type in

Type in is for one person at a time, with their details. Each person is a card with **Full name**, **Unit or lot (optional)**, **Email address** and **Mobile number**, and a fold-out **Mailing address** line: "for a paper ballot, or for someone with no email or mobile" (Street address, Apt, suite (optional), City, State and ZIP). **Add another voter** adds a second card.

The line under each card tells you what will happen:

- "An email or a mobile number is enough. A name, unit and address are kept on the roster." (before you type)
- "Ready to add." for an email voter.
- "Gets their ballot by text. This election must have SMS verification on to reach them." for a mobile number with no email.
- "No email or mobile, so this member is reached by mail." for a name with a complete mailing address and nothing else.
- In yellow, what is wrong: "That email address does not look right.", "That mobile number is too short to text.", "Add an email, a mobile number, or a full mailing address so this voter can be reached." or "Add an email address or a mobile number."

When a card has both an email address and a mobile number, only the email is kept: the person is added as an email voter and the mobile number is not saved. Add the number afterwards with **Edit details** on their row.

> GOOD TO KNOW
>
> The unit you type here goes on the voter-list entry. When the election counts one vote per unit, it is also saved in the unit field of the person's contact record in People, where their online ballot reads it, in place of any unit already there. Someone already on this voter list is not added again and keeps their unit: change it with **Edit details** on their row. If you turn on one vote per unit later, in the election's settings, the units you typed are saved to those contacts then, except where a contact already has a unit.

File

The File tab shows a dashed box headed **SMART IMPORT**: "Drop a spreadsheet here, or choose a file". Under it: "Excel or CSV, straight out of your management software. It works out which column is which, leaves out the headings and totals, and fixes the formatting. You see every change before anything is imported. Up to 5,000 rows." A link offers **Download the template**: "every column the importer understands, with one example of each kind of voter." The import itself is covered in Import a spreadsheet.

Groups

Groups are the saved groups from People, such as a building or a committee. The tab says "Choose which groups can vote:" and shows each group with its color, name and number of voters. Pick one or more. The line underneath counts the people "selected after removing overlaps". The groups are added by email address: someone in a group with only a mobile number or a mailing address is not added this way. If you have no groups yet, the tab says "No groups yet" and links to People with **Go to Contacts**.

Contacts

The Contacts tab lists people already in People who have an email address, with a **Search your contacts** box. Tick the people to add. It shows your first 100 contacts; to add anyone not listed, use the Paste tab.

The count, the button and what can stop an add

The bottom of the window counts everyone it is about to add, however they are reached ("{n} voters to add"), and the button says **Add {n} voters**. A few things can appear before it lets the voters in:

- **A higher price tier.** On a published election that has been paid for, adding people can move it into a higher price tier. A yellow note says so before you press the button and shows the difference you will be asked to confirm. If you go ahead, the window shows the new tier and the amount, paid from your prepaid balance, and the button becomes **Pay** followed by the amount and **and add**. A draft is priced when you publish, and a subscription plan that covers the election never adds a charge here. See Billing and payments and vote.direct/pricing.
- **Consent to text.** If you are adding people who get their ballot by text, and you have not yet confirmed consent for them, a yellow panel asks for it once. It explains that carriers require your organization to already have each person's permission, and that if you are not sure you have it you can give these voters an email address instead or leave them off. Tick the box and the button becomes **Turn on texting and add {n} voters**. If the election is free (25 voters or fewer), a box adds that the election will not text these voters, because texts come with paid elections. The statement you confirm is quoted in Text your voters.
- **Your contact limit.** Everyone you add is saved to People, which has a limit. If the new people would go over it, a panel says "This would go over your contact limit." with "Adding {n} voters would put you over your contact limit of {limit}. You have room for {r} more. Remove some people from the roster, or see plans with more room."

Other messages you may see:

Message	Why
Add at least one email or mobile number, upload a file, or pick a group or contact.	Nothing to add yet.
Still loading the selected groups, one moment.	The Groups tab is still counting.
Elections with more than 5,000 voters require enterprise pricing. This would take the roster to {n}. Please contact us.	One election can hold up to 5,000 voters on its own.
Too many requests. Try again in a bit.	You can add voters 10 times an hour.
This election has closed.	A closed election's list cannot change.
Could not add voters. Please try again.	The add failed. Nothing was added.

After you add

Election	What you see
Draft	"{n} voters added" with "Added to this election and saved to your contacts. Nobody is emailed until you send the ballot after publishing."
Scheduled or live, ballots by email	A window asks **Send the ballot to the {n} new voters now?**: "Adding people to the roster does not email them. Send now so they can vote, or do it later with "Send to unsent" in the voter list." Press **Send now** or **Later**. Later leaves them marked "Not sent".
You deliver ballots yourself	"{n} voters added", with a reminder to download notices, the links file or the sign-in sheet for the new voters.
Everyone was already on the list	"No new voters" with "Everyone you entered was already on the list."

Send now emails everyone you added who has an email address, except people voting on paper or with a printed code. People with only a mobile number are texted from the **Text voters the link** card. See Invitations and reminders.

Import a spreadsheet

The importer reads the member list your management company or your own records already have. It works out which column holds what, tidies the formatting, and shows you every decision before it adds anyone. The same importer runs in the Add voters window, on the public upload page (see Ask someone else for the list) and in People.

Files the importer reads

- Excel workbooks (`.xlsx` , `.xlsm`) and text files (`.csv` , `.tsv` , `.txt`), up to 5 MB.
- Up to 5,000 rows. A longer file is cut at 5,000 rows, with a note such as "File has {n} rows. Only the first 5,000 will be imported." (for a workbook, the note names the tab).
- The heading row is the first row with two or more cells filled in, so a title line above the headings is skipped. A column with data and no heading is named by its letter, such as "Column B". A heading used twice gets a number, such as "Phone (2)".
- A workbook with several tabs opens on the first visible tab that has rows, and a **Sheet** menu lets you pick another. Only the tab you pick is read.

Files the importer cannot open get a message naming the fix:

File	Message
Over 5 MB	That file is over 5MB. Send the member list on its own, without the extra sheets.
Older Excel (.xls)	That is an older Excel file (.xls). In Excel: File → Save As → Excel Workbook (.xlsx), then upload that.
Numbers	That is a Numbers file. In Numbers: File → Export To → Excel or CSV, then upload that.

File	Message
PDF or Word document	We can only read a spreadsheet, not a document. Copy the addresses out of it and paste them instead.
Anything else	Upload a spreadsheet: .xlsx, or .csv. From Google Sheets: File → Download → Microsoft Excel or CSV.
No columns or no rows	That file has no columns. Please check the format. / That file has no data rows. / No tab in that workbook has any rows under its headings.

The template

Download the template gives you a CSV file with every column the importer understands, and one example row for each kind of voter:

Column	What to put in it
Name	The person's full name. Voters see it on their ballot and paper voters on their envelope.
Email	Their email address. Two owners in one cell, separated by a semicolon, are read as co-owners.
Phone	Their mobile number.
Notify By	How they get the ballot. See the values below. Leave it blank for email.
Unit	The unit or lot. An owner of several units can list them separated by semicolons.
Weight	The vote weight, such as shares or an entitlement percentage.
Address Line 1, Address Line 2, City, State, ZIP	The mailing address. Needed for anyone voting on paper by mail.

Your own file does not need these exact headings. The importer recognizes the usual names, such as "Owner Name", "E-Mail Address", "Cell Phone", "Lot", "Unit #", "Voting Interest" or "Zip Code".

How rows become voters

- A row with an email address becomes an email voter.
- A row with a mobile number and no email becomes a text voter.
- A row with no email and no mobile, but a name and a complete mailing address (street, city, state and ZIP), becomes a paper voter reached by mail, or at the meeting if Notify By says so.
- Any other row is counted as invalid and left out.

The Notify By column understands words like these, in any capitals and spacing:

The voter gets	Words that mean it include
A text	text, texts, sms, txt, phone, mobile, cell, cellphone, yes, y, true, 1

The voter gets	Words that mean it include
An email	email, e, electronic, inbox, no, n, false, 0
A paper ballot by mail	mail, postal, post, paper, paper ballot, mail in, by mail, usps, letter, absentee
A paper ballot at the meeting	in person, meeting, at meeting, at the meeting, walk in, on site
A printed voting code	code, voting code, pin, credential, kiosk, shared device, ipad, tablet

A word the importer does not recognize leaves that person on email, and the import window says how many rows that affected. Someone set to get a text who has no usable number is emailed instead.

What we read

The import window is titled **Import Voters from a spreadsheet**, with the file name and row count under it. It opens with a summary of the file in your terms.

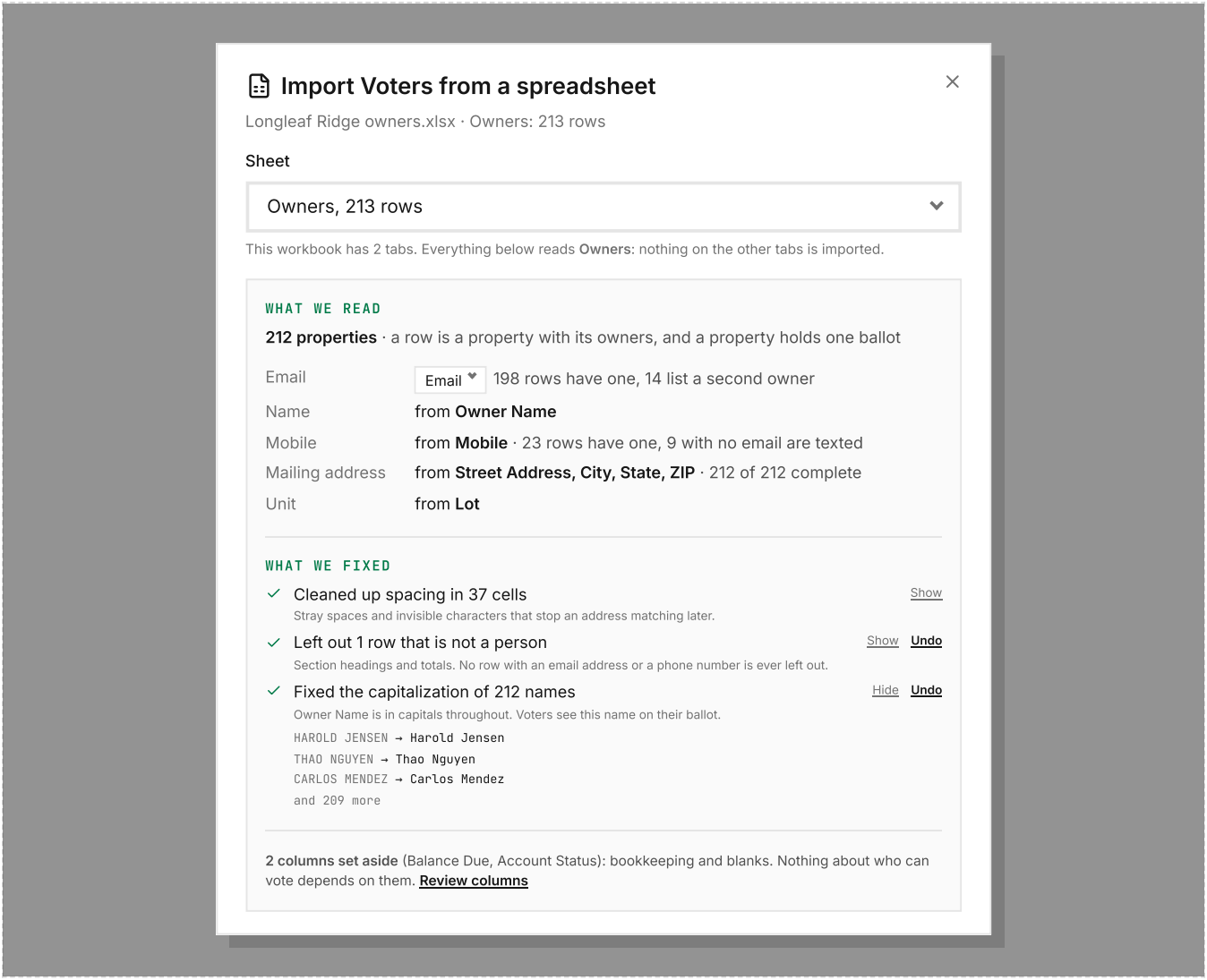


FIGURE 6.4 The top of the import window for a 213-row owner export: one totals row left out, 212 properties read, names fixed, and two bookkeeping columns set aside.

The **What we read** box says where each kind of information comes from:

- How many rows, or properties when the file lists second owners.
- **Email**: which column holds the addresses, with a menu to choose another. The first choice, **This file has no email column**, is right for a list of postal addresses.
- **Name**: one column, or first and last name columns together. If there is none it says "no name column found; voters are addressed by email".
- **Mobile**: which column, how many rows have a number, and how many of those have no email and will be texted.
- **Mailing address**: which columns, and how many rows have a complete address.
- **Voting weight**, **Unit** and **Notify by**, when the file has them.

When the importer could ask an AI model about the columns, a short description of the file may appear at the top, with a note at the bottom: "Column names and value patterns were checked by an AI model. The names, emails, phone numbers and addresses themselves were read and tidied in your browser, and never sent anywhere."

What we fixed

Every change the importer makes to your data is listed, counted and reversible. **Show** lists up to three examples from your own file. **Undo** imports that part exactly as written, and **Apply** turns it back on.

Fix	What it does
Cleaned up spacing	Removes stray spaces and invisible characters. Always on.
Left out rows that are not people	Leaves out section headings, totals and a repeated heading row. No row with an email address or a phone number is ever left out.
Put names in first-name-first order	Turns "Jensen, Harold" into "Harold Jensen" when most of a name column is written last name first.
Fixed the capitalization of names	Turns names written all in capitals, or all in lower case, into ordinary capitals.

Columns set aside and the column review

Columns that have nothing to do with voting are set aside, each with a reason, for example "empty in every row", "dollar amounts", "a status or category, not a member detail", "the management company's bookkeeping", "a second number" (when a file has two phone columns, only one is texted) or "filled in on 3 of 212 rows". **Review columns** opens the full column list in four groups:

- **In use**: columns the importer recognized.
- **Verify matches**: columns that look like one of your existing contact fields. **Confirm all suggestions** accepts them.
- **Could not place**: columns with real content the importer could not place. "Left out unless you keep them. Nothing about who can vote depends on them." **Confirm all new fields** keeps them as new contact fields.
- **Set aside**: with their reasons.

Each column has a menu: Ignore this column, Display Name, Member first name, Member last name, Co-owner first name, Co-owner last name, Phone, Notify By (Email / Text), Mailing address, any of your existing fields, or **+ Create new field** (Text, Number, Boolean, Date or Select). A column you have not decided on is left out when you import; it does not block the import.

The preview and detection notes

Preview (first 5 rows) shows the columns in use, with a link to show them all. The email column is tinted green, a weight column violet and a unit column blue. When the importer finds a vote weight column, a note says it will be saved as a number field you can choose for weighted voting.

Owners on several rows

Management exports often list an owner of two units on two rows with the same email address. When that happens, a blue panel says how many owners are listed on more than one row and asks what to keep:

- **All their units on one voter** (recommended): one voter carrying every unit they own.
- **First row only.** Their other units are left out of this election.

The same email on several rows with the same unit, or with no unit, is a plain repeat: the first row is imported and the badge "{n} emails repeat, first row kept" lists them.

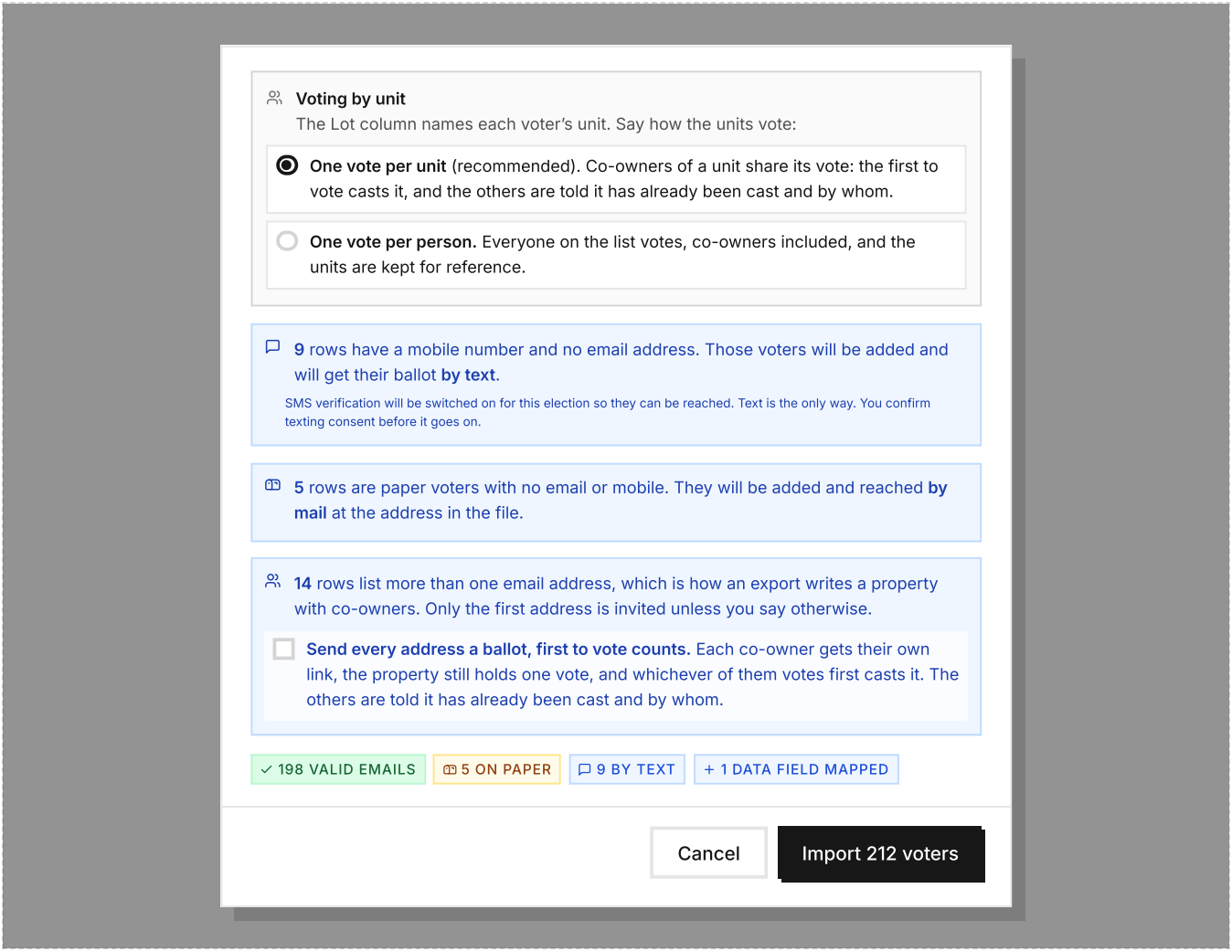


FIGURE 6.5 Further down the same window: how units vote, the text-only and paper rows, the co-owner question, the counts, and the Import button.

Voting by unit

When the file has a unit column and you are adding voters to an election, the window asks how the units vote:

- **One vote per unit** (recommended): co-owners of a unit share its vote. The first to vote casts it, and the others are told it has already been cast and by whom.
- **One vote per person.** Everyone on the list votes, and the units are kept for reference.

If the window lists units with more than one owner, it says each counts once, for whichever owner votes first. If some owners hold more than one unit, it also asks how they vote, with the three choices described in Units, weights and co-owners.

Your answer changes the election's rules only while it is a draft or scheduled. After you import, a message confirms it ("One vote per unit is on") or explains why not ("Voters added, voting rules unchanged" because voting has already started, or because the election already votes by another unit field).

Text-only rows, paper rows and co-owner email cells

- **Text-only rows.** Rows with a mobile number and no email are added as text voters. If the election does not send texts yet, the note says it will be switched on and that you confirm consent first. On a free election (25 voters or fewer) the note says nobody is texted unless your plan covers texts, and that you can hand those voters their links yourself, give them an email address, or pay for texts when you publish. If the file has numbers but no column was recognized as Phone, a yellow note tells you to set a column to **Phone** so those rows are added instead of skipped.
- **Paper rows.** Rows with no email and no mobile but a name and a complete address are added as paper voters reached by mail. Rows with no name or an incomplete address are counted and skipped.
- **Co-owner email cells.** A cell with two addresses is a property with co-owners. Only the first address is invited unless you tick **Send every address a ballot, first to vote counts**. With the box ticked, each co-owner gets their own link and the property still holds one vote.
- **Notify By.** When the file has a Notify By column, a note counts how many will be texted and how many emailed, and lists any values it could not read.

The counts and Import

Badges near the bottom count what the import will do: **{n} valid emails**, **{n} on paper**, **{n} by text**, **{n} invalid** (press it to list the rows), **{n} emails repeat, first row kept** and **{n} data fields mapped**. The bottom bar stays in view while you scroll, with **Cancel** and **Import {n} voters**.

Pressing **Import {n} voters** adds them; there is no second confirmation in the Add voters window. Price, consent and contact-limit questions still stop the add, as described in Add voters. New fields the import creates, such as a Lot field, are saved to People first, so each person's values land on their contact record.

Units, weights and co-owners

By default every voter casts one ballot worth one vote. An association can count differently in two ways, and both read the person's contact record in People:

- **Weighted voting.** Each ballot counts by a number on the voter's contact, such as shares, lots or an entitlement percentage. The weight is read when the person submits their ballot. A missing value, or one that is not a number, counts as 1. A zero is allowed and counts as zero. The field must be a Number field.
- **One vote per unit.** One ballot per unit, lot or household. Co-owners of the same unit share a single vote: the first to vote casts it. The units are read from the person's contact, from the field you choose. Several units can be separated with a semicolon or a comma, and capitals do not matter.

Where you set them:

- In the wizard, under **Advanced options**, **Voting Rules**: **Weighted Voting** and **One vote per unit**.
- On the election's **Settings** tab, in the **Who can vote** group: **Weighted voting** ("Off: every ballot counts as 1" or a number field) and **One ballot per unit** ("Off: one ballot per voter" or a field). These change only while the election is a draft or scheduled.
- In the spreadsheet import, with **Voting by unit**.

If you have no suitable field yet, the menu says so and links to the Fields page in People ("Create one").

Owners of more than one unit

With one vote per unit on, choose how someone who owns several units votes them. This is fixed once voting opens.

Choice	What happens
One ballot for all of their units	They vote once and their answers count for every unit they own. Simplest, and right when an owner votes the same way for all of them.
One email, a ballot for each unit	One invitation naming their units, then a separate ballot for each one in the same sitting. They can vote unit 4 one way and unit 12 another.
A separate email per unit	One invitation per unit, each naming its unit in the subject line and opening that unit's ballot alone. They can vote one now and the rest later.

With sealed ballots, each owner casts one ballot for all of their units, and the other two choices are not offered. When an election uses both weights and units, each unit can carry its own weight: list the weights in the same order as the units, separated by semicolons. A single number on an owner of several units is their total, not a number for each unit.

What a voter sees when a unit is already taken: "This property's ballot has already been cast by {name}. Each property votes once." for co-owners sharing one ballot, or "All your units have already been voted:" followed by each unit and who voted it. A voter whose contact has no unit in the chosen field sees "No unit assignment found for your account" and cannot vote: give them a unit with **Edit details** on the voter list, or on their page in People. See What your voters see.

Co-owners

There are two ways to give co-owners of one property their own links while the property keeps one vote:

- Put each co-owner on the list as their own voter with the same unit, and turn on one vote per unit.
- In a spreadsheet, list both addresses in the email cell and tick **Send every address a ballot, first to vote counts**. Each address becomes its own entry on the voter list and gets its own ballot, and the first to vote casts the property's ballot.

The election's count of eligible ballots counts such a property once. The Voter List shows each co-owner as a separate row.

> GOOD TO KNOW
>
> The **Also email** addresses on a person in People are not added to any election's voter list. To give a second owner a ballot, add them as a voter.

Proxy voting

You can turn on proxy voting for an election and set how many people one holder may vote for:

- In the wizard, under **Advanced options**, **Voting Rules**: the **Proxy Voting** switch ("Allow eligible voters to delegate their vote to another voter") and **Maximum proxies per holder** (1 to 10, starting at 3).

- On the election's **Settings** tab, in the **Voting rules** group: **Proxy voting** and **Max proxies per holder**, while the election is a draft or scheduled.

Delegating happens online, from the voter's side. Once a member has confirmed who they are, with an emailed or texted code, an email link or a voting code, their ballot page shows **Name a proxy**. They enter the email address of the person who will vote for them and, if they like, their own name. No vote.direct account is needed. The person they name must be on the voter list, if the election has one, and must confirm who they are with that same email address. Their ballot page then lists the ballots they hold, each with **Cast proxy ballot**, and the member can take the proxy back with **Take back** until it is used. There is no form for you to record a proxy yourself, on paper or online.

When proxy voting is on, the Voters tab shows a read-only **Proxy Assignments** card: each holder "on behalf of" the person who delegated, with a badge (**Active**, **Used** or **Revoked**) and the date. With none it says "No proxy assignments yet".

> TIP
>
> Ask members who hold proxies to cast those ballots before their own. Once a holder has cast their own ballot, the ballots they hold can no longer be cast. If your members give paper proxies, call or text (512) 222-8191 before you build the election: there is no form for you to record them.

Roster checks

Two cards above the Voter List appear only when they find something.

Units with more than one address

This card finds the same owner listed more than once on one unit, for example under two email addresses. It says how many units are affected and how many extra ballots that unit could cast: "{n} units have the same owner listed more than once, which is {k} extra ballots that unit could cast. Co-owners with different names are not counted here." It adds: "This is often deliberate, so the ballot reaches an owner wherever they read their mail. Confirm and we won't raise it again." Each unit lists its entries with a **This is intentional** button. Confirmed units move under a "{n} confirmed as intentional" link, where **Undo** brings one back.

If the entries are not deliberate, remove the extra ones (see Remove voters), or turn on one vote per unit so the unit counts once.

Voters with no {field}

On a weighted election, this card lists voters whose weight field is blank or not a number: "{n} voters have no usable value in {field}, and will each be counted as 1." Each row ends in "Blank" or "Not a number:" with the value found. The card explains that their ballots still count, each carrying one {field}, which is unlikely to match your bylaws, and that a value you add on each contact applies straight away, with no need to rebuild the election. Thousands separators and text such as "N/A" are the usual causes; enter digits only.

Remove voters

To remove one person, point at their row and press the trash can, or open their record and press **Remove from roster**. The confirmation asks **Remove {name} from the roster?**:

- On a draft: "They will not be sent a ballot for this election. They stay in your contacts."
- On a live election: "Their ballot link stops working and they are no longer counted toward turnout. They stay in your contacts."

To clear the list, press **Remove all** and type `DELETE` to unlock the button.

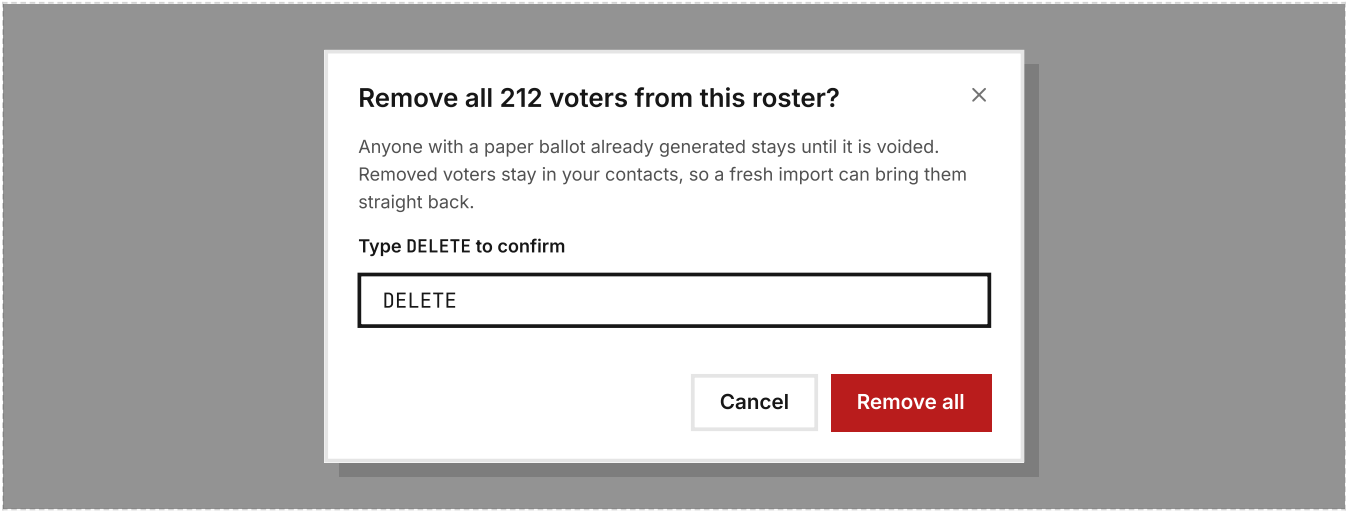


FIGURE 6.6 Clearing the list of a draft election. The button stays gray until DELETE is typed.

What stays when you remove people:

- Anyone who has voted. Their ballot is counted and their row stays. On a list where some have voted, the question reads "Remove the {n} voters who have not voted?" and says how many will stay.
- Anyone with a paper ballot already generated, until that ballot is voided on the Paper ballots page.
- Their contacts in People. Removing someone from an election never deletes the person.

After **Remove all** a line reports what happened, for example "212 voters removed." or "81 voters removed. 131 stayed: 131 already voted."

Removing voters does not lower the price you paid. Removal is refused once the election is closed: "This election has closed. Its roster is part of the record."

Ask someone else for the list

Often the member list sits with a manager or the secretary. The wizard's Voters step lets you finish everything else and send them a link.

1. On the Voters step, the wizard asks **Do you have your voter list?** and says either answer works. Choose **Yes, I have it** ("Add them now and publish today") or **Not yet** ("Set it up and we'll get you the list").

2. With **Not yet**, the wizard says "Waiting on the list. That's fine." and its last button becomes **Save & request the list** in place of publishing. **Actually, I have it** switches back.
3. In the **Don't have the list handy?** panel, press **Ask someone for the list**. The election needs a title first. You get a private link with **Copy**: "Forward this to whoever has the member list. It works for 14 days."
4. Send the link to whoever has the list. They do not need an account.
5. When they upload, vote.direct notifies you in the app and by email, and the people appear on your list. If the wizard is still open, the panel reports how many voters were uploaded and a message says "Your voter list arrived".

The same panel appears on a draft's Overview tab. The link works only while the election is a draft and for 14 days.

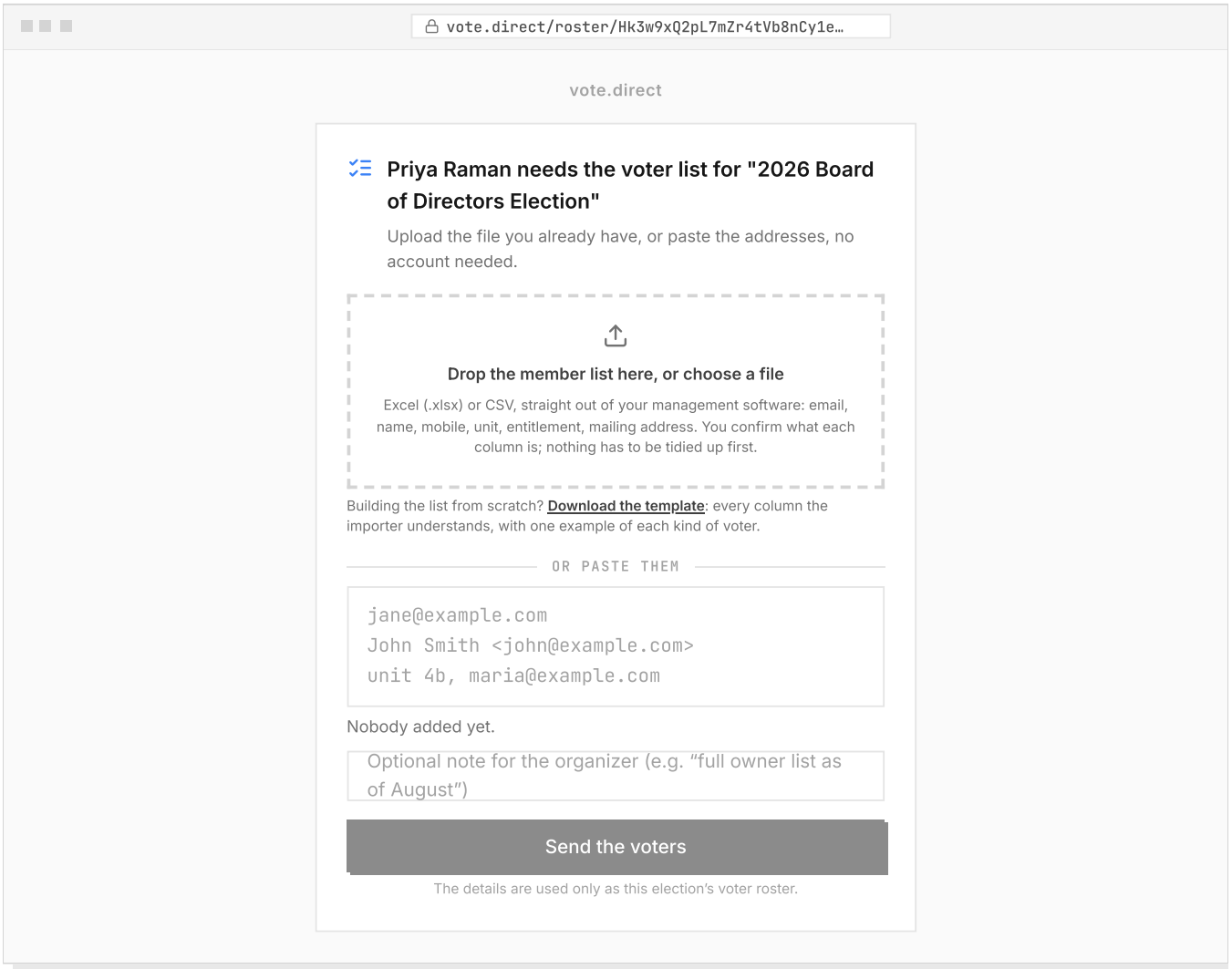


FIGURE 6.7 The page the link opens. The person with the list uploads the file or pastes addresses, with the same importer you use.

The person with the list uploads the file and confirms the columns with **Check the columns**, the same importer described in Import a spreadsheet, or pastes addresses, and presses **Send {n} voters**. They see "List received, thank you" with how many were added and how many were already on the list, and can press **Add more voters** to send more. An expired link shows "This link is no longer active", and once the election is published it shows "This election already launched".

Some decisions stay with you. People uploaded as text voters cannot be texted until you confirm consent on the Voters tab. Uploading never spends money: the price is set when you publish.

> BEFORE YOU PUBLISH
>
> At least one voter is required to publish. An election with an empty list is refused: "This election has nobody on its voter list, so publishing it would not reach anyone. Add your voters, or send yourself the upload link and publish once the list is in." See Test, then publish.

People: your contact book

People in the top bar opens your contact book at `vote.direct/dashboard/contacts`. Everyone you add to any election is saved here, and you can add people here first and pick them later with the Groups or Contacts tabs of Add voters.

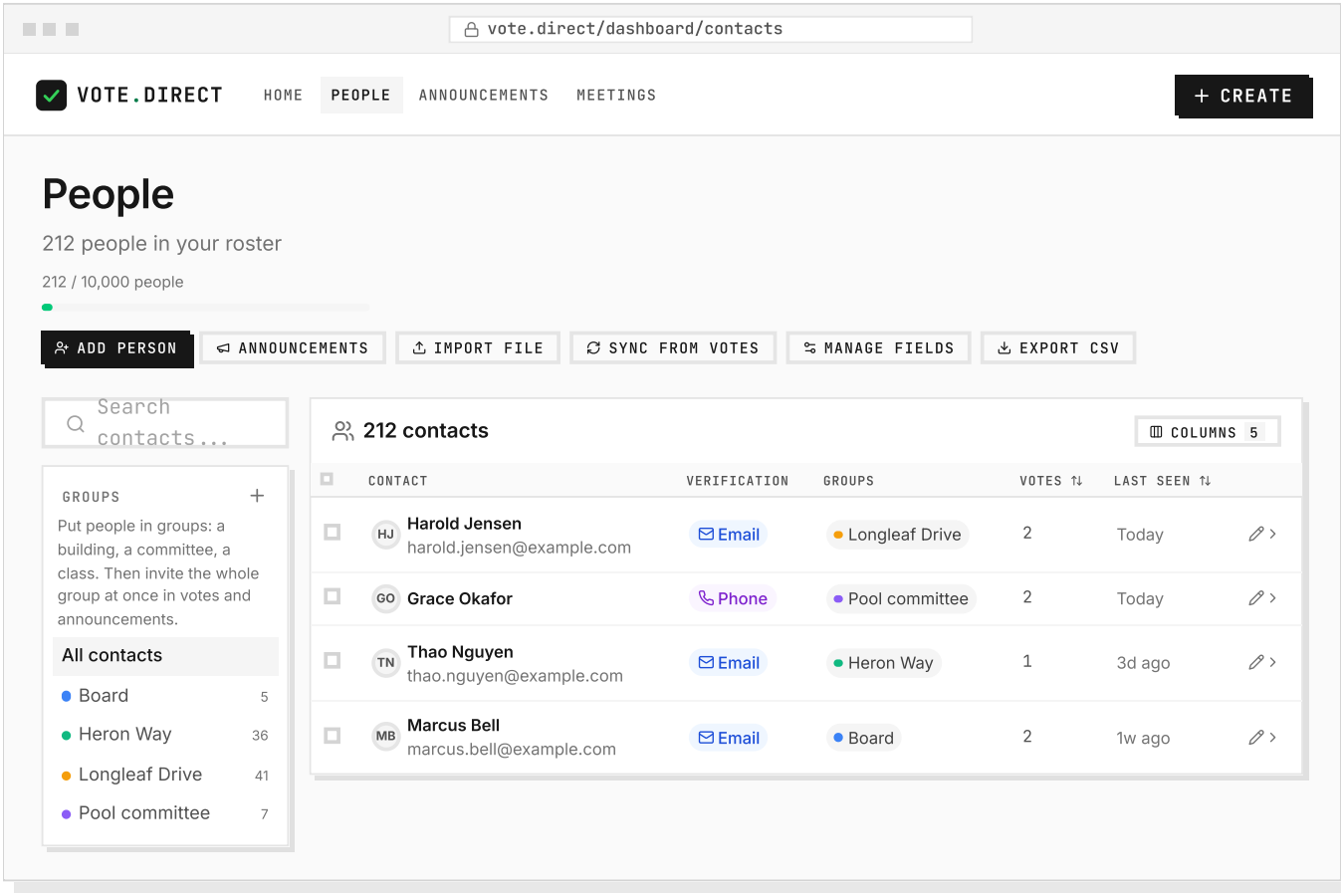


FIGURE 6.8 People for Longleaf Ridge: 212 contacts, the toolbar, saved groups on the left, and the contact table.

The page

The heading reads **People**, with how many people are in your roster and, under it, how much of your contact limit you have used ("212 / 10,000 people"). An **Upgrade** link appears when you reach the limit. The buttons across the top:

Button	What it does
Add Person	Adds one person. Disabled when you are at your contact limit.
Announcements	Opens Announcements. See Announcements.
Import file	Imports a spreadsheet of people.
Sync from Votes	Adds people who voted in your elections. Shows what it will change first.
Manage Fields	Opens your custom fields, such as Lot or Ownership %.
Export CSV	Downloads everyone as a spreadsheet.

A **Member Accounts** button also appears. Member sign-in comes with Governance Center community plans; see Governance Center.

On the left: a search box (it searches names and email addresses, not phone numbers), a **Verification** card that filters by how people confirmed their identity when they voted, and a **Groups** card. The table shows, by default, Contact, Verification, Groups, Votes (how many of your elections they voted in) and Last Seen. **Columns** lets you show Email, Phone, Mailing address, Source, Notes, First Seen and your custom fields, and you can drag the headings to reorder them. The table loads 100 people at a time, with **Load more** at the bottom.

Tick people to open a dark bar at the bottom of the screen with **Add to group**, **Remove from group**, **Start a vote** (opens the wizard with their email addresses) and **Delete**. When everyone on the page is ticked and more match, **Select all {n}** extends the choice to everyone matching.

Add or edit a person

Add Person opens **Add a person**: "Name and email is enough; everything else can come later." The fields are **Full name**, **Email**, **Mobile** (optional), **Also email** (optional) and a fold-out **Mailing address** (needed only for mailed ballots). Press **Add person**. An email address or a mobile number is needed. If the email address is already on another person, the window asks before using it again, with **Add person anyway** and **Use a different address**. The pencil on a row opens the same form as **Edit this person**.

> CHANGING AN EMAIL DURING AN ELECTION
>
> An election checks both its voter list and People. Changing a person's email in People does not change the address on any election's voter list. While an election is open, a voter whose list address no longer matches anyone in People is refused at the ballot with "You are not in the eligible voter list for this vote". To change someone's address mid-election, change it in People and also remove and re-add them on the election's voter list with the new address.

Import into People

Import file uses the same importer as Add voters, titled **Import Contacts from a spreadsheet**, with a button **Import {n} contacts**. It does not ask how units vote, because no election is involved, and it adds an **Add to group** section where you can put everyone imported into a group, or create one with **New group**. A row matches an existing person by email address, then by mobile number, then by exact name when it has neither, and updates that person. Success shows "CSV imported" with how many were created, updated and skipped. A file that would go over your contact limit is refused whole, with "Import refused" and a message saying how much room you have. You can import 30 files an hour.

Groups

Groups are labels such as a street, a building or a committee. Press the plus on the **Groups** card, type a name ("Group name, e.g. Building A or Board"), pick one of eight colors and press **Create group**. To put people in it, tick them in the table and choose **Add to group**. The pencil beside a group renames it, changes its color, or deletes it with **Delete this group**. Deleting a group keeps the people: "only the group label is removed. Open votes that were limited to this group will no longer count them."

Fields

Manage Fields opens **Custom Fields**: "Define metadata fields for your contacts". **Quick Add** offers ready-made fields: Unit / Address, Ownership %, Member Since, Department, Position / Title, Lot Number, Building, Membership Type, Notes and Status. **Add Field** opens a form with Label, Machine Name ("Lowercase, underscores only") and Type: Text, Number, Yes/No, Date or Select. A field's name and type cannot be changed after it is created. Weighted voting needs a Number field. The archive button hides a field; existing values are kept.

A person's field values are edited on their own page, in the **Roster details** card: click the value, or "Not set", type, and press the check mark. Online ballots read a voter's weight and unit from these fields. **Edit details** on an election's voter list saves a changed unit or weight into the field that election counts, so you can change them in either place.

Sync from Votes

Sync from Votes adds people who cast a ballot in your elections and are not in People yet, and updates those who are. It shows what it will do before it does it: **Sync {n} roster changes?**, with the elections it read, how many contacts will be created and updated, and "Nothing changes until you confirm; contact changes are retained in the audit history." Press **Confirm roster sync**. When there is nothing to do, a message says "Roster already up to date".

Each confirmed sync is listed under **Roster sync history**. The most recent one has an **Undo** button: "Undo this roster sync?" with **Undo roster sync**. Contacts you edited after the sync are kept. You can apply a sync 3 times an hour.

Export

Export CSV downloads a file named with today's date, for example `contacts-2026-10-24.csv`, with Name, Email, Phone, Verified Name, Verification Level, Source, Votes Participated, Tags (your groups), First Seen, Last Seen, Notes and your custom fields. Mailing addresses are not included. One file holds up to 25,000 people.

A person's page

Press a name to open the person's page: their details with **Edit**, their groups with **Add to group**, the **Roster details** card, **Voting History** (each election they voted in), **Notes** with **Save Notes**, and **Delete Contact**.

Rules for People

- Changing People needs the owner or admin role in your workspace. Other teammates can look but their changes are refused with "Only workspace owners and admins can manage the roster".
- The contact limit is 5,000 people for an account that has never paid, 10,000 once it has paid for anything, or your plan's limit when that is higher. Adding voters to an election counts against it.
- Removing a voter from an election keeps them in People. Deleting a person from People is permanent: ballots they already cast still count, but in an open election they can no longer vote, even if they are still on its voter list.

CHAPTER 7

Test, then publish

Try a ballot for free before anyone else sees it, then publish your election and send your voters their ballots. This chapter also explains what a refused publish looks like and how to fix it.

IN THIS CHAPTER

- The free test vote
- Send yourself a test ballot
- Dry runs and your real election
- Publish from the wizard
- Publish a saved draft
- What publishing does
- After publishing: send the ballots
- When publishing is refused
- Paying by card and coming back

vote.direct offers two free ways to try a ballot. The free test vote, on your dashboard, is a small sample election you can run once to see how voting and results work. A test ballot sends you a copy of your own election, exactly as your voters will receive it. Neither one touches your real election, and neither costs anything by email or text.

The free test vote

Your dashboard's Home page offers one free test vote per account: a real, small election with a sample ballot, sent to you and up to four other people. Use it to try voting and to watch results come in before you build your own election. The button reads **Run a free test vote**, with the line **Free · Up to 5 people · See voting + live results in 2 minutes** under it. It disappears once you have used it.

1. Press **Run a free test vote**.
2. In **Vote name**, type a name, or leave it empty to use My Test Vote.
3. Under **Also send to**, type up to four email addresses, for example your fellow board members. Press **Add another person** for each new box. Use permanent addresses; temporary inbox addresses are refused.
4. Press **Create & send test vote**, or **Maybe later** to close the window.

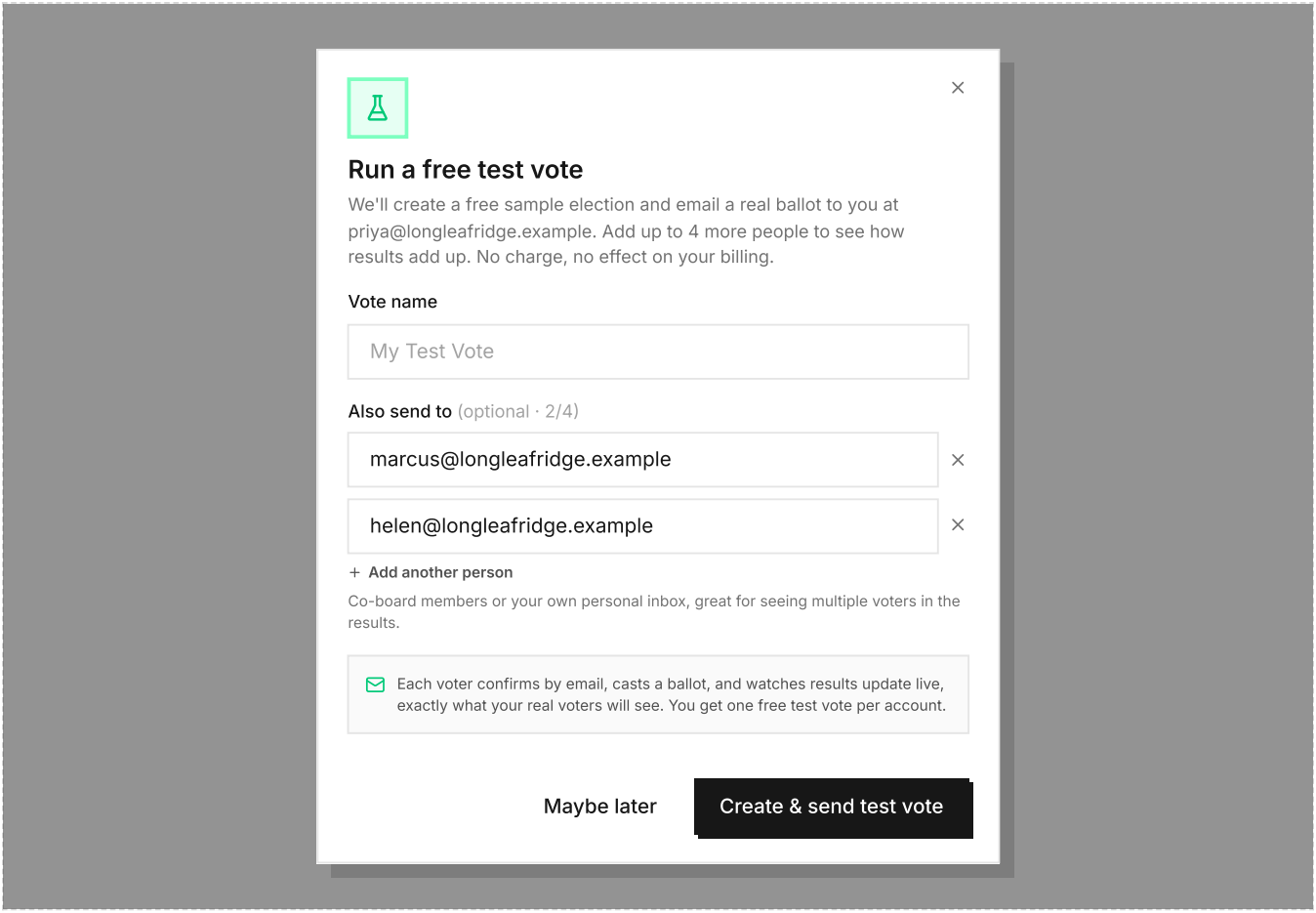


FIGURE 7.1 The free test vote window, with two board members added. Each person on it gets a real ballot by email.

The test vote opens at once with a sample ballot of two questions that you cannot change: "Which meeting time works best for you?" (Weeknight at 7:00 PM, Saturday morning, Sunday afternoon) and "Do you approve the proposed 2026 annual budget?" (Yes / No). Each person confirms their email and votes. Results are visible while it is open, and it closes on its own after 7 days.

When it is ready, the window reads **Your test vote is live**, lists the addresses the ballot was sent to, and offers **Open my ballot** and **View live results**. A line at the bottom confirms that the test is free and does not affect your billing.

Send yourself a test ballot

A test ballot tests your own election. vote.direct makes a hidden copy of the election with you as its only voter and sends you the real invitation, so you see exactly what your voters will get: the message and its subject line, the link, the verification code, the ballot and the confirmation code at the end. Nothing you do on it is counted in your real election.

You send a test ballot from the election page. On the **Overview** tab, a draft's **Publish checklist** card has a row labeled **Test ballot**, marked Optional, that reads **Send yourself a test ballot**. A scheduled or live election has the same row in its **Next steps** card. Press the row to open the panel.

1. Open your election: from Drafts on your dashboard, or with **Continue editing** on the Draft saved page.
2. On **Overview**, press the **Send yourself a test ballot** row.
3. Choose **Email** or **Text**. Your email address is filled in for you; for **Text**, type your mobile number.
4. Press **Send test ballot**.
5. Open the message, verify with the code, vote, and note the confirmation code you are given.

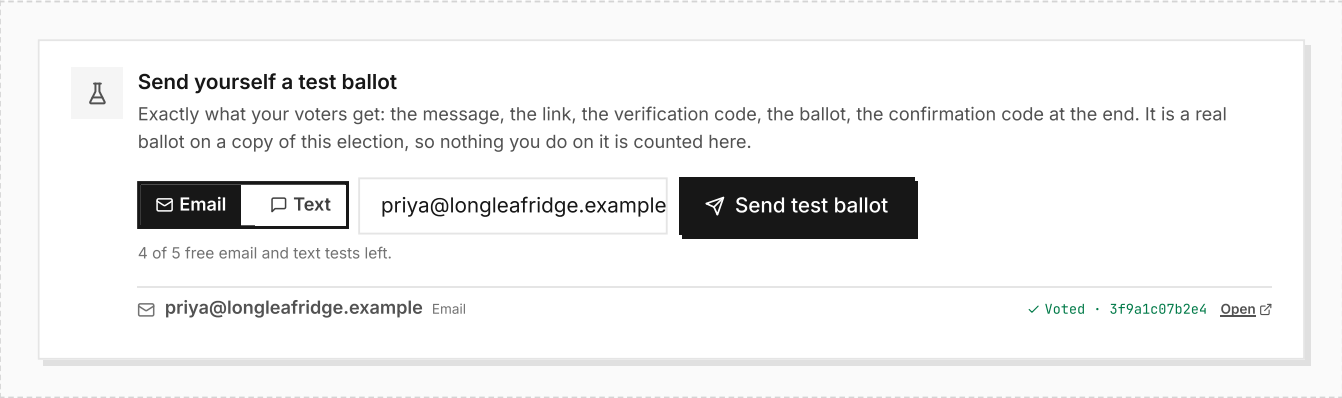


FIGURE 7.2 The test ballot panel after one email test. Priya voted on it, and the list shows the confirmation code she was given.

The panel keeps a list of every test: where it went, how it was sent, whether it was sent, and, once you vote, **Voted** with the confirmation code. **Open** goes straight to that test ballot.

- **Limits.** Each election gets 5 free email and text tests. The panel counts down, for example "4 of 5 free email and text tests left." An election can have up to 20 tests in all, mailed test packets included. A text test needs an election that has a price (more than 25 voters) or that your plan covers; on a free election the panel asks you to send yourself the email test instead. When your election can mail paper packets, a third choice, **Paper packet**, mails you a printed test packet, charged like a real one; see Paper, mail and in-person ballots.
- **What the copy keeps.** The title (so the subject line in your inbox is the real one), the description, the questions, the design, the ballot secrecy and the information you collect from voters. A text test verifies with a code by text; an email test verifies by email.
- **What it leaves out.** Your voter list (you are the only voter), the opening date (the test opens at once), the state, and the quorum and proxy rules, which shape results rather than what a voter sees.
- **When it closes.** The test uses your election's close date, online cutoff and time zone when the close is still ahead. If your election has no close date, the test has none either, so it shows no countdown and no deadline, just as your voters see none; it closes on its own 7 days after you send it. If your close date has already passed, the test closes 7 days after you send it.
- **What it never touches.** The test never appears in your list of elections, costs nothing by email or text, and is not counted in your real election's results, turnout, certificate or invoice.

The invitation itself carries no test marking, so you see it exactly as a voter will. Once you open it, the election's page, the ballot and the final screen with your confirmation code each carry a yellow banner: **TEST BALLOT · This is exactly what your voters receive. Nothing you do here is counted in the real election.** The verification screens do not show it.

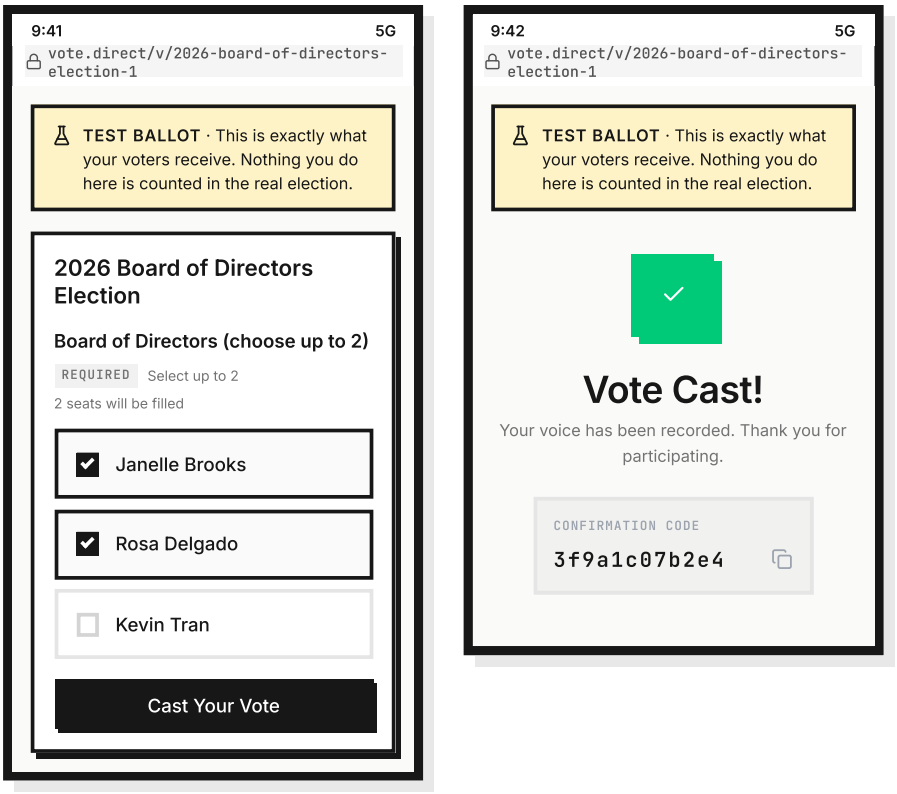


FIGURE 7.3 A test ballot on Priya's phone, simplified. The banner sits above the ballot and above the final screen, so a test is not mistaken for a real vote. The copy has its own address, here ending in -1.

> TIP
>
> Send one test by email and, if your election texts voters, one by text. Check the subject line, the sender name, the wording of each question and the deadline shown on the ballot.

Dry runs and your real election

Many organizers publish a small rehearsal before the real election. vote.direct treats a published election as a possible dry run when its title contains a word such as test, trial, practice, dry run, demo, sample or mock, or when it has 10 or fewer voters. Such an election's success page and its **Overview** tab show a card that asks **Was this a test run?**

- **Yes, the real one is coming** opens a short form titled **Your real election**: **When does voting open?** (a date, or tick **Not sure yet**), **About how many voters?** (a rough number is fine) and **Anything we should know?**. Answer what you know and press **Save**; you can change it later.
- **No, this was the real vote** closes the card.

Once saved, the card reads **Saved to your dashboard** with a sentence such as "Your real election opens Monday, October 19, with about 212 voters." It offers **Start it from this ballot**, which copies the ballot into a new election and removes rehearsal words such as Test from the title, and **Change**. Your dashboard then shows a card headed **Coming up:** with a **Start it from your test run** button. The copy keeps the ballot and its rules, and you add the real voter list and dates; see Run an election again.

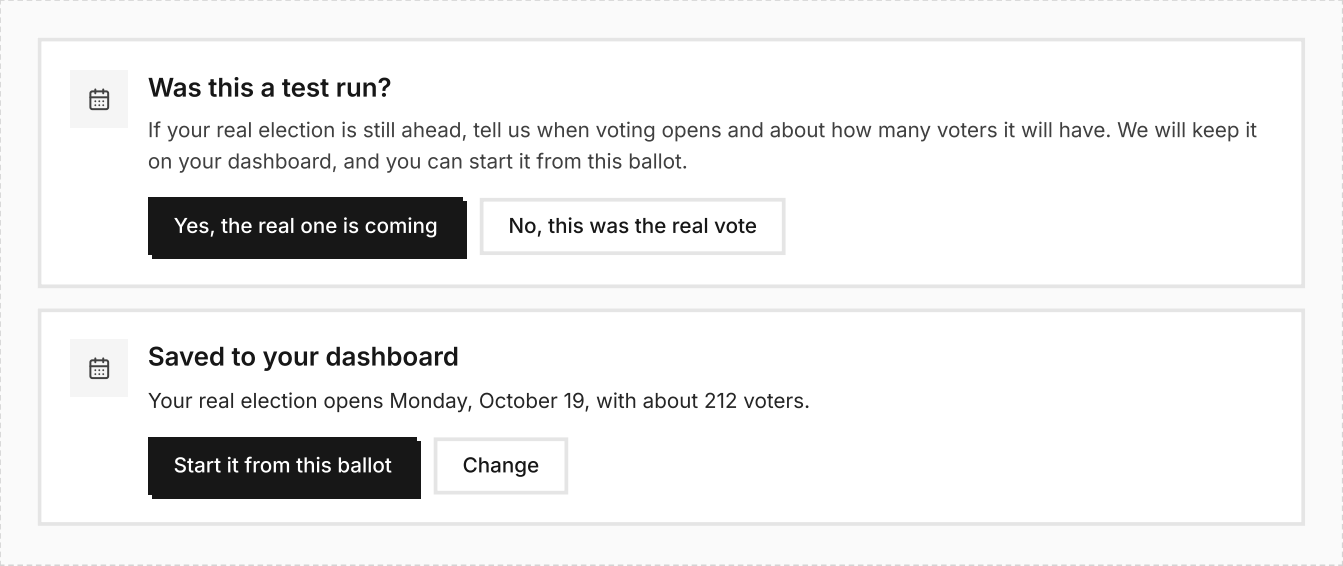


FIGURE 7.4 The test-run card before and after Priya answers it. Start it from this ballot copies the rehearsal into the real election.

The wizard helps too. When a price is due, Review shows a box that begins **Want a dry run first?** with a **Save draft to test first** button. It saves your election so that you can send yourself a test ballot from the election page before you pay. If your title contains the word test, Review also reminds you that elections of 25 voters or fewer are free and that a free test ballot sends you the ballot without publishing anything.

Publish from the wizard

On Review, the main button at the bottom right shows what publishing will do. It changes with the state of your election:

Button	When you see it	What happens when you press it
Finish setup: ...	Something is still missing, for example Finish setup: Voters.	Takes you to the step that needs it, with a yellow box listing what is needed.
Save & request the list	Your voter list is empty and you answered Not yet to Do you have your voter list?	Saves the election to your account and opens its election page, where you add voters or share the upload link. The message reads Saved. Now get the list.
Publish Vote	Nothing is owed, your plan covers the election, or your prepaid balance covers the price. When your balance pays, a green stamp on the button shows the amount.	Publishes the election. The button reads Publishing vote... while it works.
Pay & Publish	A price is due and your balance does not cover it. A green stamp on the button shows the price.	Saves the election, then opens a secure checkout page run by our payment processor. See Paying by card and coming back.

Button	When you see it	What happens when you press it
Save and set up paper ballots	Anyone on your list votes on paper, by mail or at the meeting. It is the only button; Review says "Next: the paper ballots".	Saves the election and opens its Paper ballots page. An election with paper voters publishes only after you choose who prints and mails their ballots and, on Self-print and We mail them, who counts them. The paper page then says what publishing still waits on, and links back to the election page to publish (or pay and publish). See Paper, mail and in-person ballots.

Save draft, beside the main button, saves without publishing. Drafts and autosave explains where you land. If your election texts voters and the consent box on Review is not ticked, publishing stops with **Confirm SMS consent first**.

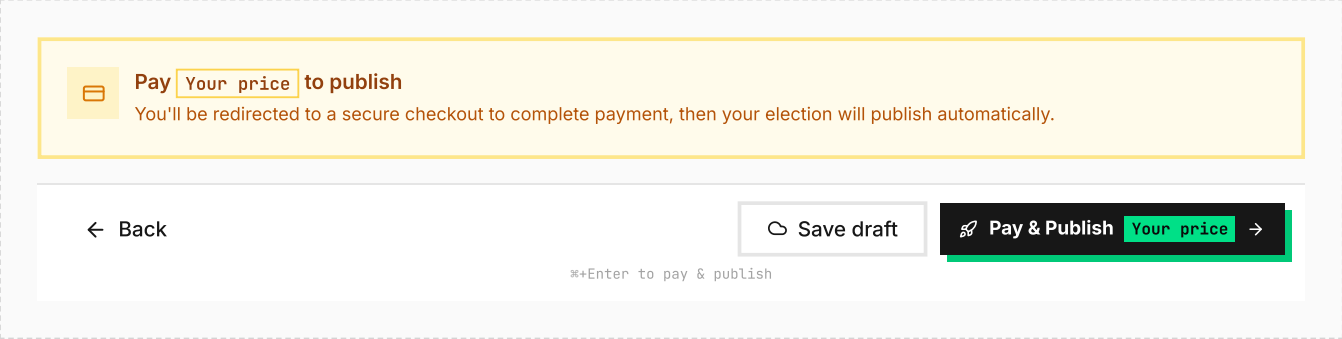


FIGURE 7.5 The end of Review when payment is due. The price for your list appears where this figure says Your price.

Publish a saved draft

A saved election is published from its **Publish checklist** card. The card appears on the Draft saved page you reach after **Save draft**, and at the top of the election page's **Overview** tab while the election is a draft.

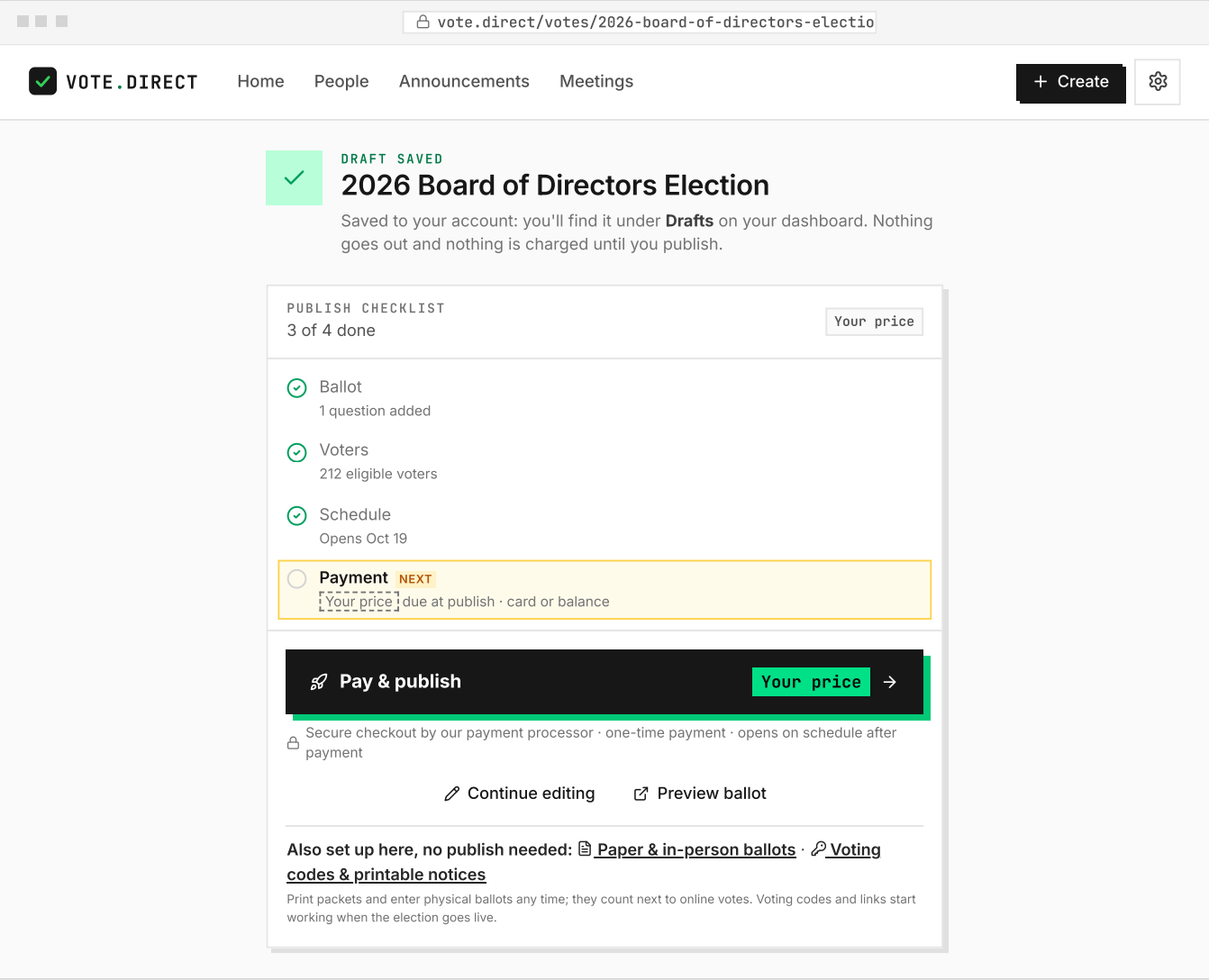


FIGURE 7.6 The Draft saved page for the 2026 Board of Directors Election. Payment is the last row left, so the main button is Pay & publish. The price for your list appears where this figure says Your price.

The header of the card reads **Everything is ready**, **Everything is set except the voter list**, or a count such as **3 of 4 done**. The badge on the right shows the price: Priced by your list, Free, Included in plan, Paid, or the amount for your list.

Row	What it says
Ballot	The number of questions, or Add at least one question.
Voters	The number of eligible voters, or No voters yet. Publishing waits on this row; with an empty list, the card also offers the Ask someone for the list link.
Schedule	Opens and the date, Opens as soon as you publish, or Fix your voting window with the reason.
Payment	What publishing will charge and how, for example the price followed by due at publish · card or balance, Balance covers publish, Election paid, Election included in your plan, or Free election (25 voters or fewer), nothing charged at publish.

The card on the Draft saved page shows those four rows, plus **Paper ballots** and **Counting** when voters are set to vote on paper. The card on the election page adds rows when they apply: **Compliance** (the state check), **Web address** (your own domain), **Paper ballots** and **Counting** (when voters are set to vote on paper), and the optional **Voter details** and **Test ballot**. Publishing checks all of them wherever you press the button.

The first row that blocks publishing is outlined in yellow and tagged **Next**. Press a row to go to where you fix it; on the Draft saved page, most rows open the election page. Pressing **Payment** opens a box for adding funds to your balance without leaving the page; see Billing and payments.

The main button is always the next real step:

- **Finish setup:** followed by the step, while something is missing.
- **Pay & publish**, with a green price stamp, when only payment is left and you can pay by card. The line under it reads "Secure checkout by our payment processor · one-time payment · goes live right after payment", or "opens on schedule after payment" when the opening is in the future.
- **Publish now** when everything is ready, with a line that says how it is paid and when it opens, for example "Free · live immediately", "From your prepaid balance · opens on schedule" or "Included in your plan · live immediately".

Under the main button sit **Continue editing** and **Preview ballot**. A last line lists what you can set up before publishing: **Paper & in-person ballots** and **Voting codes & printable notices**. On the election page, once everything is ready, the rows fold away and **Show checklist** brings them back.

If voters are set to get a text on a free election (25 voters or fewer), a yellow note says it cannot be published while anyone is set to get a text, with a button such as **Hand these 2 voters their links yourself**. Pressing it moves those voters to links you pass on yourself; nothing is texted. A second button under it, which starts with **Pay**, takes you to pay by card instead: you pay the price of a 26 to 50 voter election for this one, it publishes when the payment goes through, and those voters are texted.

When publishing succeeds, you see **Vote published!** with "Your vote is now live and ready for voting.", "Your vote is scheduled and will go live at the set time.", or "The start time you set had already passed, so voting is open now." Then the success page opens.

What publishing does

- **It opens voting, now or later.** If the opening time is in the future, the election becomes Scheduled and opens on its own at that time. Otherwise it goes Live at once, including when a start time you set has already passed.
- **It takes payment.** A priced election that your plan does not cover is paid for when you publish: from your prepaid balance, or by card through the checkout described under Paying by card and coming back. Elections of 25 voters or fewer are free. See Billing and payments.
- **It checks your settings.** Publishing runs the checks described under When publishing is refused, and the election stays a draft until they pass.
- **It confirms by email when voting opens at once.** When publishing opens voting immediately, vote.direct sends you a confirmation email, unless the election looks like a test run. Publishing a scheduled election sends no email at that moment.
- **It fixes the ballot once voting opens.** See What you can change after publishing.

INVITATIONS ARE NOT SENT AUTOMATICALLY

Publishing makes the ballots available. It does not send them. You send them from the success page, or later from the election page.

After publishing: send the ballots

After publishing you land on the success page. Its header shows **LIVE**, with a pulsing green dot, or **SCHEDULED**, then your title and one sentence: for example "2026 Board of Directors Election is live for 212 voters. Send them their ballots below.", or "2026 Board of Directors Election opens October 19, 2026 at 9:00 AM EDT." Under it, **Manage vote** opens the election page and **Add voters** opens its Add voters window.

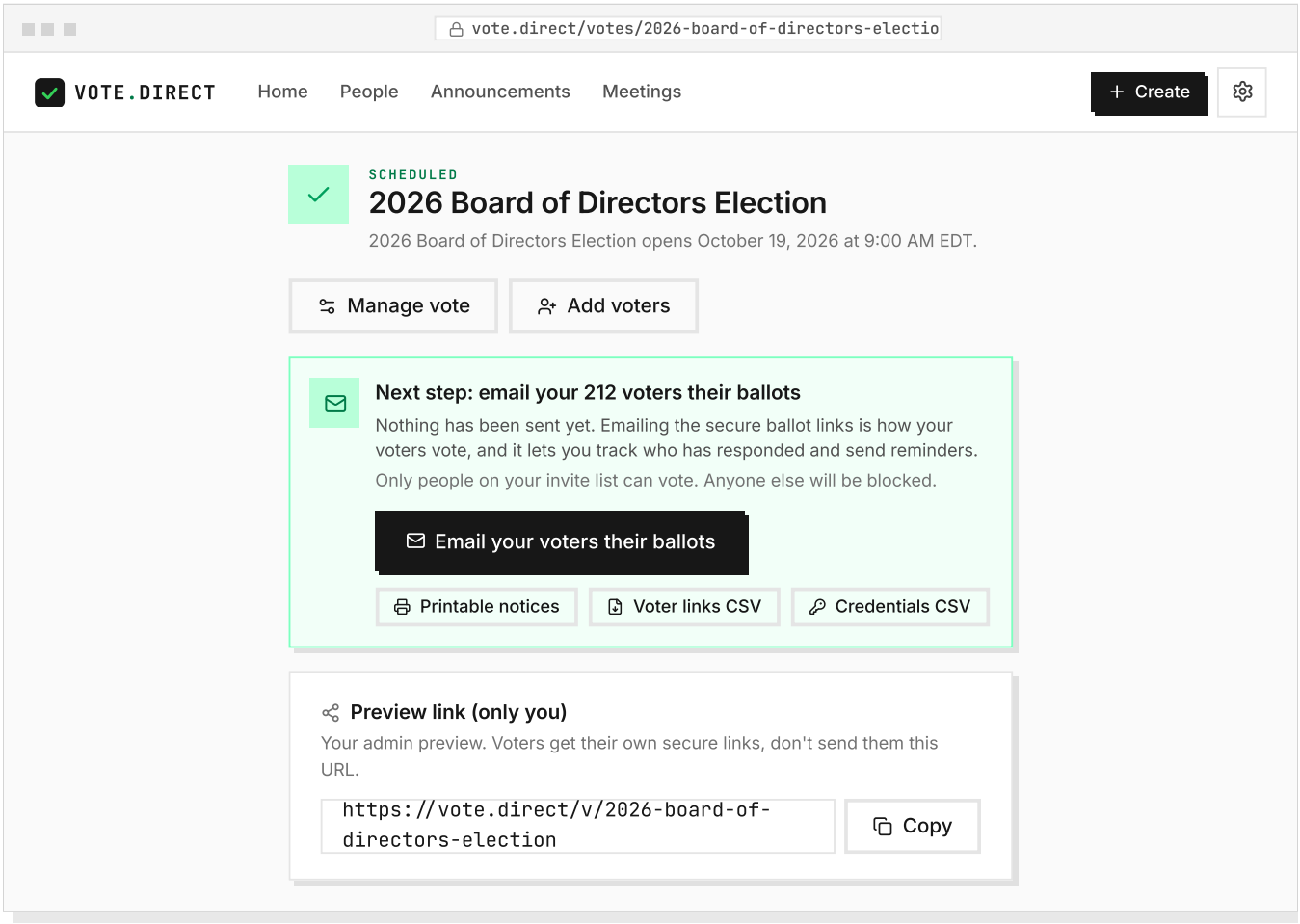


FIGURE 7.7 The success page after publishing the 2026 Board of Directors Election, which opens October 19. Nothing has been sent to voters yet.

The green card holds the next step for the delivery method you chose in the wizard:

Delivery method	Card heading	Main button
Email invites	Next step: email your 212 voters their ballots (with your number)	Email your voters their ballots

Delivery method	Card heading	Main button
Print notices yourself	Next step: print your voting notices	Download printable notices (PDF)
Share links yourself	Next step: download your voter links	Download voter links (CSV)
Usernames & passwords	Next step: download your voter credentials	Download voter credentials (CSV)
Everyone votes on paper	Next step: the paper ballots	Open paper ballots

Smaller buttons under the main one offer the other methods: **Printable notices**, **Voter links CSV**, **Credentials CSV** and, when you chose a method other than email, **Email invites too**. Treat a links or credentials file like a list of passwords.

When you press **Email your voters their ballots**, vote.direct sends the ballot email to every voter set to get email who has not been sent it yet, confirms **Invitations sent** with the number emailed, and the button changes to **Invitations sent**. Pressing it again later emails nobody twice. When some voters are on paper, the heading counts only the others, for example "Next step: email your 4 online voters their ballots", and a line under it points the paper ones to the Paper ballots page. Voters set to get a text, and voters on paper, are sent their ballots separately from the election page; see Invitations and reminders and Paper, mail and in-person ballots.

Below the card, **Preview link (only you)** shows the election's address. It is your private preview: voters get their own secure links, so do not send them this address. At the bottom, **Go to dashboard** returns to your dashboard.

When publishing is refused

vote.direct checks your election when you publish. If something stops it, the election stays a draft and nothing is sent.

- From the wizard, you see **Almost there: this vote is a draft** with the reason, and you land on the Draft saved page, or on the Paper ballots page when the reason is the paper setup.
- From the Publish checklist card, a message names the problem, for example **Add your voters first**, **Change a setting first**, **Fix the voting window** or **Texts need a paid election**, and the page takes you to the place to fix it where it can.

Reason	What the message says	What to do
Nobody is on the voter list	"This election has nobody on its voter list, so publishing it would not reach anyone. Add your voters, or send yourself the upload link and publish once the list is in."	Add at least one voter. An election cannot be published without one.
Voters on paper, no paper setup	"This election has 5 paper voters. Choose how paper ballots are handled (you print and mail them, or Vote.Direct does) before publishing."	Open the Paper ballots screen and choose, then assign who counts the returned ballots if it asks.

Reason	What the message says	What to do
The state check found a problem	"Fix before publishing:" with each suggested change and the statute it cites, then "Your draft is saved. The Compliance card on the election's Settings tab has the details."	Change the setting it names, then publish again.
An inspector of elections is needed	That your state requires an independent inspector of elections, with the statute, and that your draft is saved.	Appoint an inspector on the election page, then publish. See Inspectors and state rules.
The close date has passed	"The close date is in the past: move it to a future date and time."	Change the close date in the schedule.
The ballot is unfinished	"Finish the ballot before publishing:" followed by each problem, such as Question 1 needs text.	Complete the questions it names.
Not enough prepaid balance	The election's cost and your current balance.	Add funds, or pay by card with Pay & publish.
The voter list grew past what you paid for	How many eligible voters the election now has, the price band that needs, and the band you paid for.	Remove voters to fit what you paid for, or cancel the election for a refund. See Billing and payments.
Your own domain is not verified	That the domain has not been verified yet, and to finish the setup or remove the domain.	Finish connecting the domain on the election page, or remove it.
Voters set to get a text on a free election	"Text messaging is included with paid elections. Free-tier elections send email only; texts cost carrier fees on every send." followed by how many voters are set to get a text.	Hand those voters their links yourself, switch them to email, or pay the price of a 26 to 50 voter election for this one and they are texted. Texts are included without that once the election has more than 25 voters.
More than 5,000 voters	"Elections with more than 5,000 voters require enterprise pricing. Please contact us."	Contact us for a quote.

> GOOD TO KNOW
>
> This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

For any other problem, the Troubleshooting chapter lists what each message means; see Troubleshooting.

Paying by card and coming back

Pay & Publish in the wizard and **Pay & publish** on the Publish checklist card both take you to a secure checkout page run by our payment processor. Before you get there, vote.direct checks the things that would stop publishing, such as the state check, the schedule, the ballot and the paper setup, so most problems show up before you pay. If one does, you see a message such as **Checkout failed** or **Change a setting first** with the reason, and nothing is charged.

On the checkout page you can enter a promotion code if we gave you one. Then:

- **When you finish paying**, you return to the Draft saved page, which shows **Publishing your vote…** and publishes the election. You see **Vote published!** and the success page opens. If the payment is still being confirmed, the page waits and tries again a few times.
- **If the election cannot publish after payment**, you see **Payment received, but the election has not published yet** with the reason. A card on the Draft saved page names the next step, for example **Fix the voting window** or **Choose how paper ballots are handled**, with a button to the page where you fix it. Your payment stays on the election; publish again once it is fixed.
- **If you cancel the checkout**, you return to the Draft saved page with **Checkout cancelled**: your draft is saved, and you can pay and publish when you are ready.

Prices, balances, receipts and refunds are explained in Billing and payments.

CHAPTER 8

Invitations and reminders

Publishing an election sends nothing. This chapter covers sending each voter their ballot by email or text, handing out notices yourself, the automatic reminder plan, what to do when an email bounces, and exactly what your voters receive.

IN THIS CHAPTER

- Nothing is sent when you publish
- Send the ballot by email
- Who your invitations come from
- Text your voters
- Other ways to deliver
- Automatic reminders
- Bounced and failed emails
- What your voters receive

Nothing is sent when you publish

Publishing makes the election ready to vote in. It does not email or text anyone. Each voter gets their ballot when you send it, and every voter gets their own personal link.

Right after you publish, a page confirms the election is live or scheduled and offers the next step. When you chose email delivery in the wizard, the next step is to email everyone. Further down the same page, the election's main address, `vote.direct/v/2026-board-of-directors-election`, appears under **Preview link (only you)**: "Your admin preview. Voters get their own secure links: don't send them this URL."

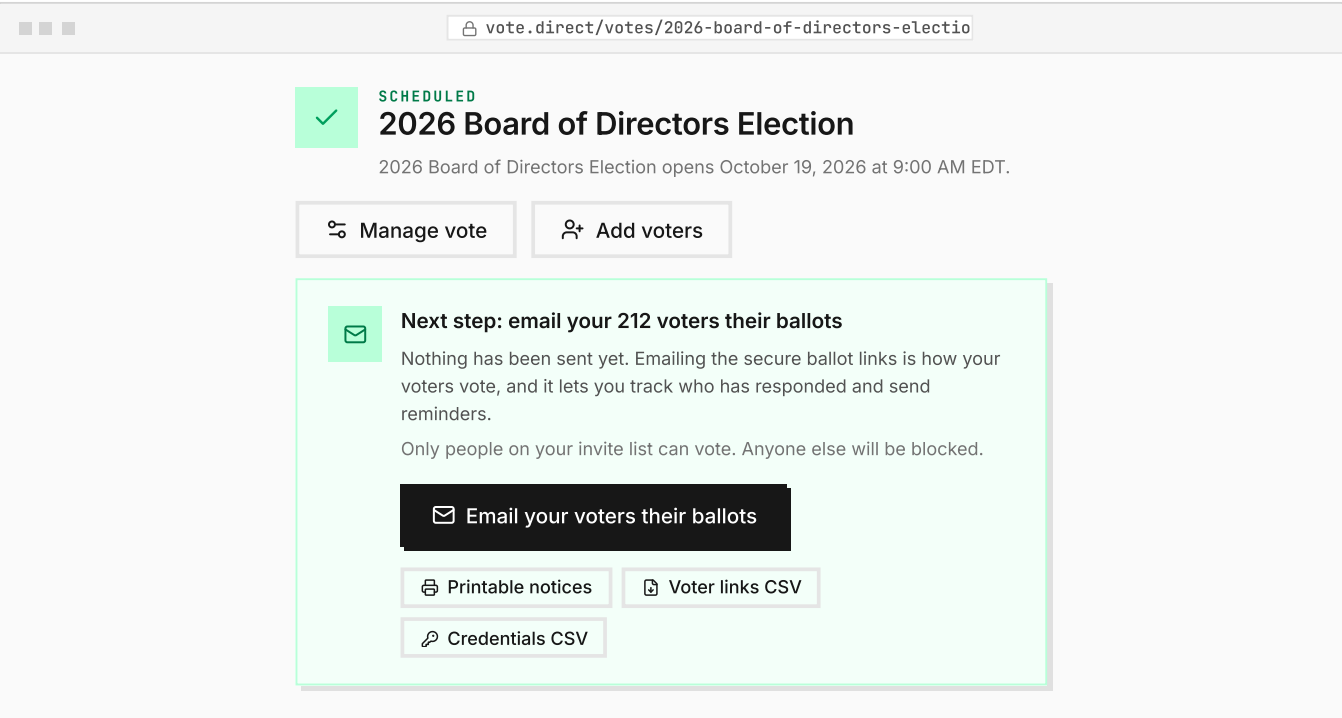


FIGURE 8.1 The page after publishing a scheduled election. Nothing has been sent until you press Email your voters their ballots.

Email your voters their ballots emails everyone on the list who is set to get email and has never been sent the ballot. When it finishes, the button reads **Invitations sent** and a message says how many voters were emailed. People set to get a text, a paper ballot or a printed code are not emailed: text them from the Voters tab (see Text your voters), and handle paper ballots on the Paper ballots page (see Paper, mail and in-person ballots).

The smaller buttons, **Printable notices**, **Voter links CSV** and **Credentials CSV**, download notices, a links file or a sign-in sheet instead. If you chose to hand out ballots yourself in the wizard, the page leads with that download (for example **Download printable notices (PDF)**) and offers **Email invites too**. Every one of these downloads needs **Distribute ballots yourself** on. Choosing **Print notices yourself**, **Share links yourself** or **Usernames & passwords** in the wizard turns it on for you, so the download works straight away. On an election set to **Email invites**, turn it on first on the election's Voters tab; until then a download stops with "Distribute ballots yourself is off for this election, so no voting codes were made." A download does not mark anyone as sent. See Other ways to deliver.

If you leave this page without sending, nothing is lost. The election's Voters tab says the ballot has not been sent and offers the same send, and the Overview tab lists it as a step: "Email the ballot to {n} voters", with "Nobody is emailed automatically. Send the ballot so they can vote."

> GOOD TO KNOW
>
> You can send while an election is scheduled. The invitation names when voting closes, not when it opens. What a voter sees if they open their link early is in What your voters see.

Send the ballot by email

All sending happens on the election's **Voters** tab. Ballots go only to people on that election's list, and only to people set to get email: someone voting on paper or with a printed code is never emailed, even if you name them.

Send to everyone not yet sent

When some email voters have never been sent the ballot, the Voter List shows a yellow banner, "The ballot has not been sent to {n} voters", with a **Send to {n} unsent** button (or **Send the ballot now** for one person). A confirmation asks **Send the ballot to {n} voters?**: "Each one gets an email with their own secure voting link. People already invited or who have voted are not emailed." Press **Send the ballot**.

The rows switch to "Invited · hasn't voted" and a message confirms: "Ballot sent" with "Queued {n} of {n} emails." Queued means the email was handed to the email service; vote.direct cannot see whether it reached the inbox, but it shows any failure the email service reports (see Bounced and failed emails).

Send to one person

Point at a voter's row. Someone never sent the ballot has a **Send** button that is always visible; someone already invited has **Resend**. A message confirms "Invitation sent" with "Email sent to" and the address.

People added after you sent

Adding people to a live or scheduled election does not email them. Right after you add them, a window asks **Send the ballot to the {n} new voters now?** Press **Send now**, or **Later** to leave them marked "Not sent". The yellow banner then says "Voters added after publishing are not emailed automatically. Send them the ballot so

they can vote." until you send.

Guards against sending twice

- **Send to {n} unsent**, **Send now** and the button on the page after publishing skip anyone this election's ballot reached in the last 12 hours. Pressing a send button twice never emails the same person twice.
- A single voter's **Resend** goes at most once every 15 minutes. Inside that window you see "Already sent" with "{address} was sent this ballot in the last 15 minutes. If it has not arrived, ask them to check their spam folder before you send it again."
- One address can be resent to at most 10 times an hour: "Too many sends to this recipient. Try again later."
- Someone who has voted is never sent the ballot again.

Messages after a send

Message	What it means
Ballot sent	"Queued {q} of {n} emails." with, when some were left out, "Skipped" and why: sent this ballot in the last 12 hours, or already on their way.
Already sent	"Nobody was emailed twice." Everyone you chose had already been sent the ballot.
Nothing was sent	Everyone on the list has already voted or was emailed too recently.
Nothing to send	"Everyone on the roster has been sent the ballot."
Failed to send	The send was refused. The reason follows, for example "Add a payment method to email your voters." Add one under Billing and send again.

If every remaining voter is on text or paper, the send is refused with a message that says so, for example "No email recipients to send to: all {n} remaining voters are assigned to text messages. Use "Text voters" to reach them."

Who your invitations come from

The name in the From line of every invitation and reminder is your organization's name as the election carries it: the name under the election's title, after "by". With no name, the email comes from "vote.direct". The address the email is sent from is vote.direct's shared sending address, unless you set up your own sending domain (below).

Who is this ballot from?

If the election has no usable organization name when you press **Send to {n} unsent** or **Send now**, a window asks **Who is this ballot from?** It explains that your organization has no name set, so the ballots would come from "vote.direct", and that voters open an email from a name they know. Type the name in **Organization name** and press **Save and send**, or press **Send as vote.direct** to send without it. The window notes that the name is used on every election in this workspace, including the ones you have already built.

The name must be your organization's name, not an email address: "Use your organization's name here, not an email address. Voters see this as who the ballot came from, and mail providers treat a sender name containing an address as spoofing, it lands in spam." The automatic name vote.direct creates for a new account, such as "Priya Raman's Organization", is refused for the same reason. If a ballot does go out under "vote.direct", the notification bell says "Name your organization so voters recognise your ballots".

Change the name

- **For the whole workspace: Settings**, **Organization** ("Name and sender identity"). Change **Organization name** and press **Save Organization**. Elections that carried the old name, or no name, take the new one. An election you gave a different name of its own keeps it. Only an owner or admin can change these settings.
- **For one election:** while it is a draft or scheduled, use the **Sender name** field when you edit the ballot. On a live election, press the pencil beside the name under the title, type, and press the check mark.

The same page has an **Email sender name** field ("Leave blank to use the organization name."). It applies to invitations and reminders only once you have your own sending domain.

Your own sending domain

By default, mail goes out from vote.direct's shared address with your organization's name. With your own sending domain, invitations and reminders are sent from an address at your association's domain, which can help mail providers trust them. You need access to the domain's DNS settings (usually where the domain was bought).

1. Go to **Settings**, **Sending Domain** ("Email authentication"). Owners and admins only.
2. Under **Use your own domain**, enter the **Domain**, a domain your association owns (a mailbox domain such as gmail.com or yahoo.com cannot be used), the **Mail subdomain** ("Usually "em".") and the **From address**, which must use that domain. Press **Create DNS records**.
3. Add the records shown at your DNS provider, then press **Verify DNS records**. "DNS changes can take up to 48 hours to propagate. A failed check does not remove your configuration." Press **Retry verification** later if needed.
4. When the card says **Domain verified** with a **Ready** tag, messages can be sent from your address.

With a verified domain, an election with no organization name of its own uses the workspace's **Email sender name**, or its organization name. **Remove domain** asks "Remove this sending domain?" and messages go back to the shared address.

Text your voters

Voters set to **Text message** get their ballot link by text. Three things must be true before vote.direct texts anyone:

- **The election sends texts.** It does once you add someone who can only be reached by text, or switch someone to Text message, and confirm consent. You can also choose text verification in the wizard.

- **The election is paid.** "Text messaging is included with paid elections. Free-tier elections send email only; texts cost carrier fees on every send." An election of 25 voters or fewer is free and sends email only, unless your plan covers texts.
- **You confirmed consent.** For each text voter, once.

A free election with anyone set to get a text cannot be published as it is. Publishing stops with that sentence, says how many voters are set to get their ballot by text, and offers three ways forward: hand them their voting links yourself (nothing is texted), switch them to email, or pay the price of a 26 to 50 voter election for this one, and they are texted. The button that starts with **Pay** takes you to pay by card, and the election publishes when the payment goes through. The button **Hand these {n} voters their links yourself** moves them to printed voting codes and turns on **Distribute ballots yourself**; after publishing, you download their links from the Voters tab. See Test, then publish.

Consent, once per voter

vote.direct texts a voter only after you confirm that your organization already has their permission to be texted. It asks once for each person who gets texts: when you add them, when you switch them to text, or on the text card before the first send. The statement you confirm when adding voters reads:

"I confirm that every voter I am about to text gave my organization prior express consent to receive election and account notification messages at the number on file, that I am authorized to act for that organization, and that I am responsible for honoring opt-out requests. I accept the SMS Messaging Terms."

vote.direct records who confirmed it and when. Once a person is covered you are not asked again for them. People uploaded through the hand-off link are not texted until you confirm on your own Voters tab. If you are not sure you have permission, give those voters an email address instead.

The Text voters the link card

On a scheduled or live election that sends texts, the Voters tab shows **Text voters the link**.

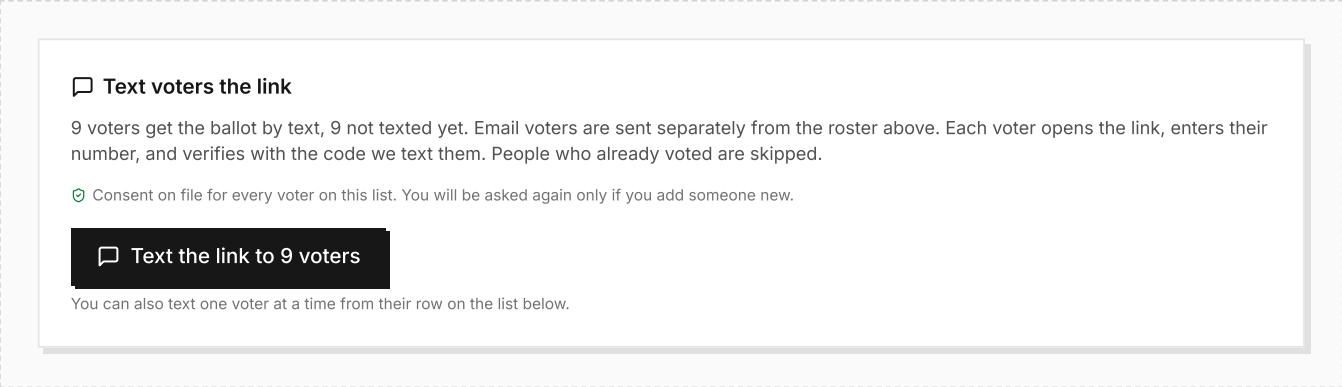


FIGURE 8.2 The text card for Longleaf Ridge's 9 text voters. Consent was confirmed when they were imported, so the card goes straight to the send button.

- If anyone on text is not yet covered, a checkbox replaces the green line: "I confirm every recipient gave prior express consent to receive election texts at the number on file, and I am responsible for that consent under the SMS Messaging Terms. You will not be asked again for these voters." When only some are new, it

names them instead ("these {n} newly added voters"). The button stays gray until it is ticked, and a row's **Text** button asks you to tick it first.

- Pressing the button asks "Text the voting link to everyone with a phone number on file?" ("Each voter gets an SMS and verifies with a code sent to their number. People who already voted are skipped.") Press **Send texts**.
- Afterwards the card reports "Sent {n} of {n} texts", the time, and that those voters now read "Invited". **Text again** brings back the send button for another round.
- To text one person, use **Text** (or **Text again**) on their row.
- If voting has not opened yet, the text says when it opens and when it closes, and vote.direct sends a second text when voting opens.
- One send texts up to 1,000 numbers. With more, a message says how many were not texted; send again to reach them, and each send goes first to people never texted.
- You can send 6 text rounds an hour from the card, and 60 single texts an hour from the rows.

STOP and HELP

Every text tells the voter to reply STOP to opt out. A voter who replies STOP gets: "vote.direct: you are unsubscribed and will get no more texts from us. Reply START to resubscribe." From then on vote.direct does not text that number, for any election, except a verification code the person asks for themselves. Replying START resubscribes them. Replying HELP returns: "vote.direct: election invitations, voting notices and verification codes for votes you are invited to. Msg frequency varies. Msg & data rates may apply. Help: support@vote.direct. Reply STOP to opt out."

Opted-out numbers do not show on the Voter List. You find out only in the result of a send, for example "{n} voters have replied STOP and were not texted; reach them by email or paper." Switch those voters to email or paper.

Other ways to deliver

The **Reach voters in more than one way** card at the top of the Voters tab shows how many voters get email, a text and a paper ballot, with links to set up reminders, **Open paper ballots**, and **Open notices and links**.

Distribute ballots yourself

Instead of email or text, you can hand each voter a personal voting code: printed on a notice, in a links file you send your own way, or as a Voter ID and password. Anyone holding a voter's code can cast that voter's ballot, so codes exist only while this is switched on. They are created when you first download. If you chose **Print notices yourself**, **Share links yourself** or **Usernames & passwords** in the wizard, it is already on: go straight to step 3.

1. On the Voters tab, find **Distribute ballots yourself**. It sits near the top when you chose to hand out ballots yourself in the wizard or when anyone on the list votes with a voting code, and otherwise inside **More ways to deliver ballots and help voters**. While it is off it says: "Off. Turn this on to generate a personal voting code for each voter: printable notices, a links CSV, or a Voter ID + password sheet. Codes are only created while this is on, and turning it off revokes them."

2. Press **Turn on**. A message gives the address voters use, for example "Voters go to vote.direct/pin/K7RX4 and enter their personal code."
3. Download what you need: **Printable notices** (a PDF, one page per voter), **Links CSV** (each voter's link and code) or **Credentials** (a Voter ID and password for each voter, for the sign-in page at vote.direct/signin). The card says "Treat downloads like a password list."

- A gray line shows the address voters type, `vote.direct/pin/K7RX4` in this example, with **Copy**, so you can print it in a newsletter or read it out at a meeting.
- On a draft, a yellow note warns: "This vote is still a draft. Voting codes only work once you publish, so notices printed now won't let anyone vote yet. Publish first, then distribute."
- The links file has the columns name, email, status, ballot_link, access_code, mobile and election_code. The sign-in sheet has name, email, status, username, password, signin_url, ballot_link, mobile and election_code.
- One notices PDF holds up to 2,000 voters. For a longer list, use the Links CSV.
- The person who created the election, and the workspace's owners and admins, can turn this on and download. Editors and viewers do not see this card.
- To stop, press **Turn off & revoke**. The card says how many codes will be permanently revoked and that "Notices, CSVs and credential sheets you have already printed or handed out will stop working immediately." Press **Revoke {n} codes**. It then stays off until you turn it on again, even on an election you set up to hand out ballots.

> A DOWNLOAD IS NOT A SEND
>
> Downloading printable notices, the Links CSV or the credentials sheet does not mark anyone as sent. The voter list keeps showing who vote.direct emailed or texted, **Send to {n} unsent** still includes everyone set to get email who was never emailed, and reminders go only to voters who were sent the ballot. You can download and email in either order.

Voter rescue

When a voter is stuck at the identity check, for example because their emailed code never came, you can issue it for them. Open **More ways to deliver ballots and help voters** and turn on **Voter rescue**: "Issue verification on a voter's behalf when they're stuck (e.g. a delayed email code). Every rescue is opt-in, capped, and audit-logged, and the voter is emailed a notice."

- The table lists voters who started confirming but did not finish, with **Rescues used** (up to 3 per voter) and **Send rescue**. With nobody waiting it says "No voters are waiting on verification right now."
- **Send rescue** opens "Rescue a stuck voter". Choose **Magic link** ("You deliver it") or **SMS code** ("We text it"). For a code, enter the phone number and tick "I confirm this voter agreed to receive a verification text at this number."
- Write the reason in **Reason (recorded in the audit log)**, at least 10 characters, then press **Generate link** or **Send SMS code**. A magic link is shown for you to copy and pass on yourself. It works once.

Automatic reminders

Every new election starts with reminders on: the **Standard** plan, 3 days and 1 day before voting closes, at 9:00 AM in the election's time zone. You can change the plan in the wizard's **Schedule** step, under **Reminders**, or on the Voters tab at any time before the election closes.

The Reminders card

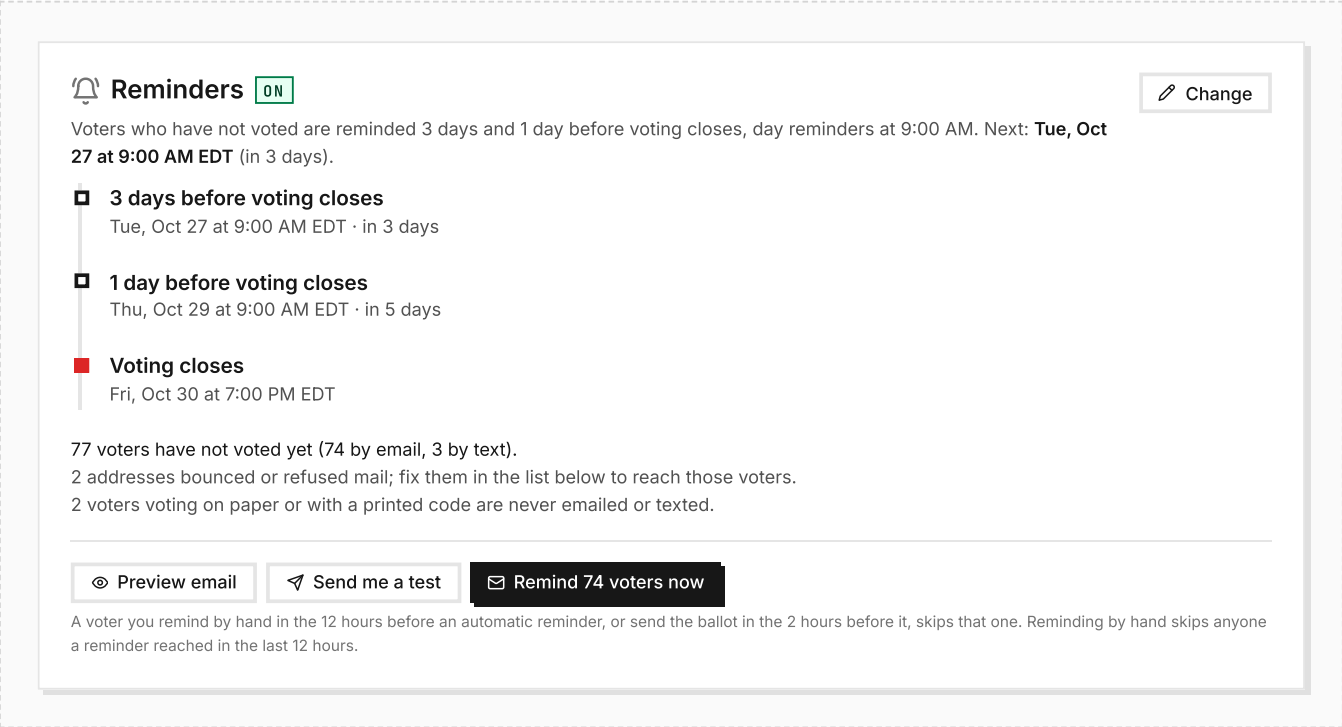


FIGURE 8.3 Longleaf Ridge's reminders on Saturday, October 24: two reminders scheduled, and who is still waiting.

The card shows, from the top:

- **On or Off**, the plan in one sentence, and when the next reminder goes out. With reminders off it says "No automatic reminders. You can still remind voters by hand." On a live election whose reminders have all passed, it adds "No automatic reminder is left before voting closes."
- **A timeline** of each reminder, ending at "Voting closes". A reminder you gave its own wording carries an "Own message" tag.
- **Who is waiting**: how many have not voted, by email and by text, plus notes for people not yet sent the ballot (they are not reminded), addresses that bounced, paper and code voters (never emailed or texted), text voters with no consent on record (not texted), and, in an election with a unit field, owners who have not voted but whose every unit has been voted (not reminded). When nobody on the list votes by email or text, it says that nobody gets a reminder instead.
- **Buttons**: **Preview email**, **Send me a test** and, on a live election, **Remind {n} voters now**. **Change** (or **Set up reminders** when off) opens the editor.

The timeline line under each reminder says where it stands:

Line	What it means
{date} at {time} · in 3 days	Scheduled.
Going out at the next hourly run	Its time has come.
Sent to {n} voters	It went out.
To each voter as their time comes	A reminder counted from each voter's ballot, so it goes out person by person.
{date} at {time} · passed, not sent	Its time passed without it going out, for example because it was added too late.
{date} at {time} · before voting opens, will not be sent	It falls before voting opens.
Needs an end date to be scheduled	The election has no closing date yet.

An election set up before reminders could be customized shows a note explaining that its 1 day reminder is the email every election with a voter list has always sent the day before voting closes, and that you can keep it, change it or turn reminders off.

Change the plan

Press **Change** to open the editor.

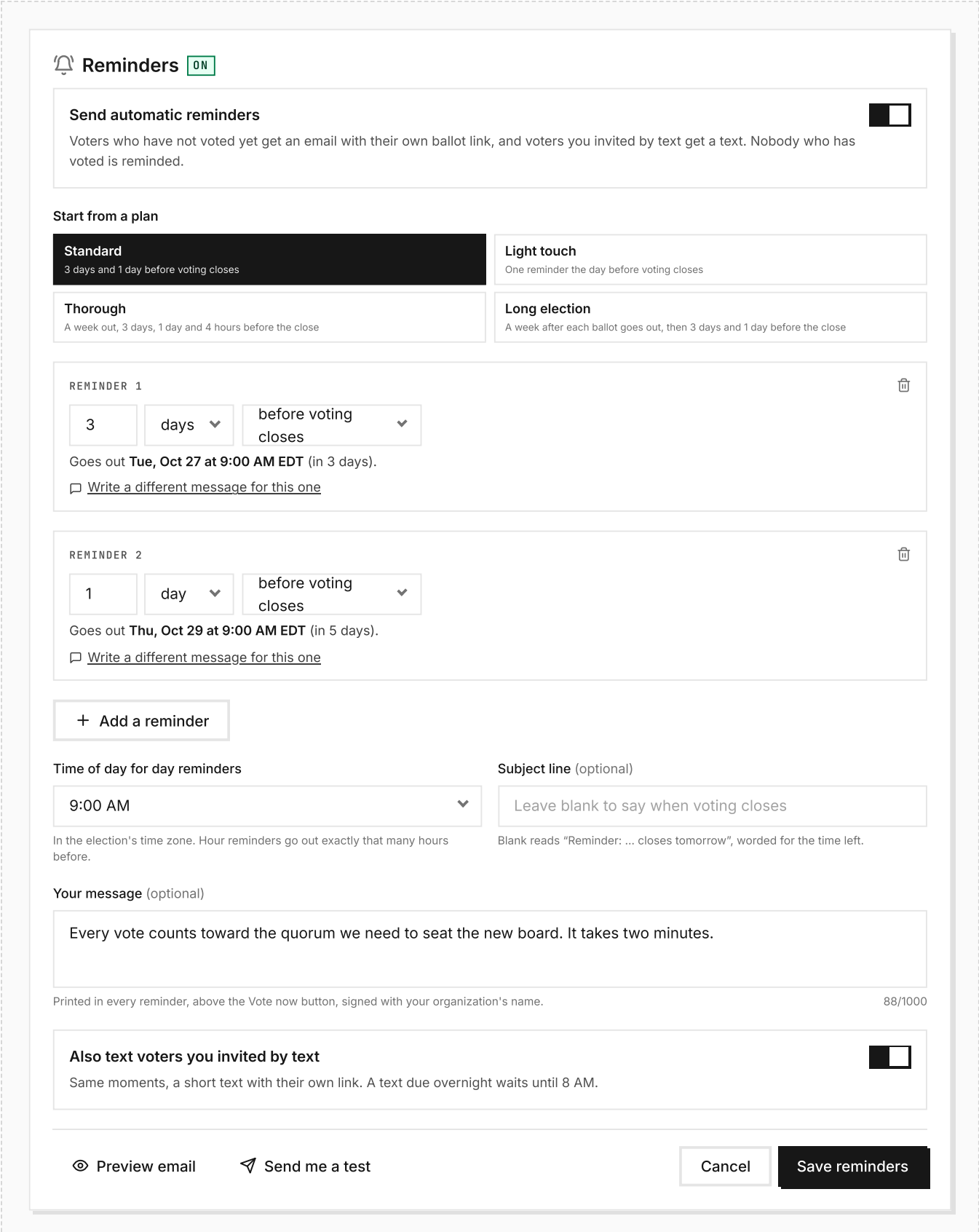


FIGURE 8.4 The reminder editor with the Standard plan, a shared message, and texts on for the 9 text voters.

- **Send automatic reminders** turns the plan on or off. Off means nothing at all goes out.
- **Start from a plan** fills in the reminders below:

Plan	Reminders
Standard	3 days and 1 day before voting closes.
Light touch	One reminder the day before voting closes.
Thorough	A week out, 3 days, 1 day and 4 hours before the close.
Long election	A week after each ballot goes out, then 3 days and 1 day before the close.

- Each reminder is a number, **days** or **hours**, and **before voting closes** or **after the ballot is sent**. Under it, the editor shows exactly when it goes out, worked out the same way the sending does. A reminder counted from the ballot "Goes to each voter" that many days after their ballot is sent.
- Limits: up to 6 reminders; 1 to 72 hours or 1 to 30 days; a reminder after the ballot needs at least 12 hours; two reminders cannot be set for the same time. Messages explain each one, for example "Two reminders are set for the same time. Change or remove one."
- **Time of day for day reminders** places day reminders at a clock time from 7:00 AM to 8:00 PM in the election's time zone. **Same time of day as the close** keeps them at whole days before the close instead. Hour reminders always go out exactly that many hours before.
- If a reminder would go out between 9 PM and 7 AM, a yellow warning says "That is the middle of the night for your voters."
- **Subject line (optional)** holds up to 150 characters. Blank uses a subject worded for the time left (see What your voters receive).
- **Your message (optional)** holds up to 1,000 characters and is printed in every reminder. **Write a different message for this one** gives one reminder its own wording.
- **Also text voters you invited by text** appears when anyone gets texts. Text reminders go at the same moments, but never between 9 PM and 8 AM where the election is: a text due overnight waits until 8 AM.
- Press **Save reminders**. A message confirms "Reminders saved" with the plan in a sentence, or "Automatic reminders are off" if you switched them off.

The election's **Settings** tab has a **Reminders** group that summarizes the plan: **Automatic reminders** (On or Off), **When**, **Time of day** and **Message** ("Standard wording" when you wrote none). Its **Change** button brings you here.

Preview and test

Preview email opens "What voters receive": a **Reminder** menu to pick which reminder (when there is more than one), the From name and Subject, and the email exactly as it will be sent, worded for the moment it goes out. **Send this one to me** emails you that reminder. **Send me a test** on the card emails you the next reminder. The test goes only to your own account's email address, with "[Test]" in front of the subject and a yellow note at the top: "Test reminder. This is what your voters receive." The test's button opens the election's ballot page; each voter's own email carries their personal link. While you are editing, the preview and the test use your unsaved changes. You can send 10 tests an hour.

Remind now

Remind {n} voters now on the card, or **Remind {n} who haven't voted** on the Voter List, sends a reminder email right away, using your subject and message. The confirmation reads **Send a reminder to {n} voters?** "Only people who were sent the ballot and have not voted are emailed. Anyone who got a reminder in the last 12 hours is skipped." Press **Send reminders**; a message confirms "Reminders sent" with how many were queued and why any were skipped. Addresses that bounced are left out. In an election with a unit field the confirmation reads **Send a reminder to the owners who still have a unit to vote?** instead, and an owner whose every unit has been voted, by a co-owner or on a paper ballot, is left out; the message counts them as "whose units have all been voted". Reminding by hand sends email only; text voters are reached from the text card.

Who gets a reminder, and when

- Reminders go only to people who were sent the ballot and have not voted: by email to email voters whose address has not bounced, and by text to text voters with consent on record, when texts are on. People not yet sent the ballot are not reminded. In an election with a unit field, an owner is not reminded, automatically or by hand, once every unit they own has been voted, by them, a co-owner or a paper ballot.
- vote.direct checks for due reminders every hour. A reminder never goes out before voting opens, or in the last 30 minutes before it closes.
- Each reminder reaches a voter once. If you move the closing date more than 12 hours later, the reminders before the close go again before the new deadline. Changing the time of day never repeats one.
- A voter is skipped for a reminder if you reminded them by hand in the 12 hours before it, or sent them the ballot in the 2 hours before it.
- A reminder you add after its time has passed never goes out. If a run is missed, a reminder can still go up to 6 hours late; once a later reminder is due, the earlier one is skipped.
- Reminders before the close need a closing date: "Reminders before the close are scheduled once the election has an end date. Set one under Settings, Schedule. Until then, voters who have not voted get one reminder 3 days after their ballot, at 9:00 AM." That one reminder appears on the timeline as "3 days after the ballot is sent, while voting has no end date". A plan with its own reminders counted from the ballot sends those instead.

Bounced and failed emails

vote.direct hears from the email service only when something goes wrong. A row without a failure badge means no failure was reported; it does not prove the voter read the email. When a failure is reported, the row's badge changes, the summary counts it as "did not arrive", and pointing at the badge shows the explanation and the "Reported reason" the email service gave.

Badge	What to do
Ballot bounced	The address does not work. The email on a voter-list entry cannot be edited, so remove the person and add them again with the right address, then send. Or switch them to **Paper by mail**, or to **Text message** if you have their mobile number and consent.
Ballot blocked	Their mail server refused it. Ask them to allow mail from your sender, give you a different address, or switch them to paper. Then use **Resend**.

Badge	What to do
Marked as spam	They reported the email as spam. Reach them another way, such as a paper ballot or a text.
Delivery delayed	The email service reported a delay and is still trying. No action is needed yet; check the row again later. If the reason says their mailbox is full, ask them to free up space, or reach them another way.

A new send clears the badge; if the new send fails too, the badge comes back. Automatic and hand reminders skip addresses that bounced, were blocked or were marked as spam. When nobody else is left to remind, the message says how many addresses bounced: "Fix those on the voter list and send the ballot again."

Changing a person's email in People does not change the address on an election's voter list. See People: your contact book.

What your voters receive

This section shows each message exactly as vote.direct builds it. What a voter sees after opening their link is in What your voters see.

The invitation email

- From: your organization's name (see Who your invitations come from).
- Subject: "{Organization} invited you to vote: {title}", or "You're invited to vote: {title}" when there is no organization name.
- When the election gives owners of several units a ballot per unit, the subject names the unit, using your unit field's own word, for example "(Lot 12)". With a separate email per unit, each unit's email opens that unit's ballot alone.
- The button and the link are the voter's own personal link. Email programs that show plain text get the same content as words: "You've been invited to vote!", the title, "Cast your vote here:" with the link, and the closing date.

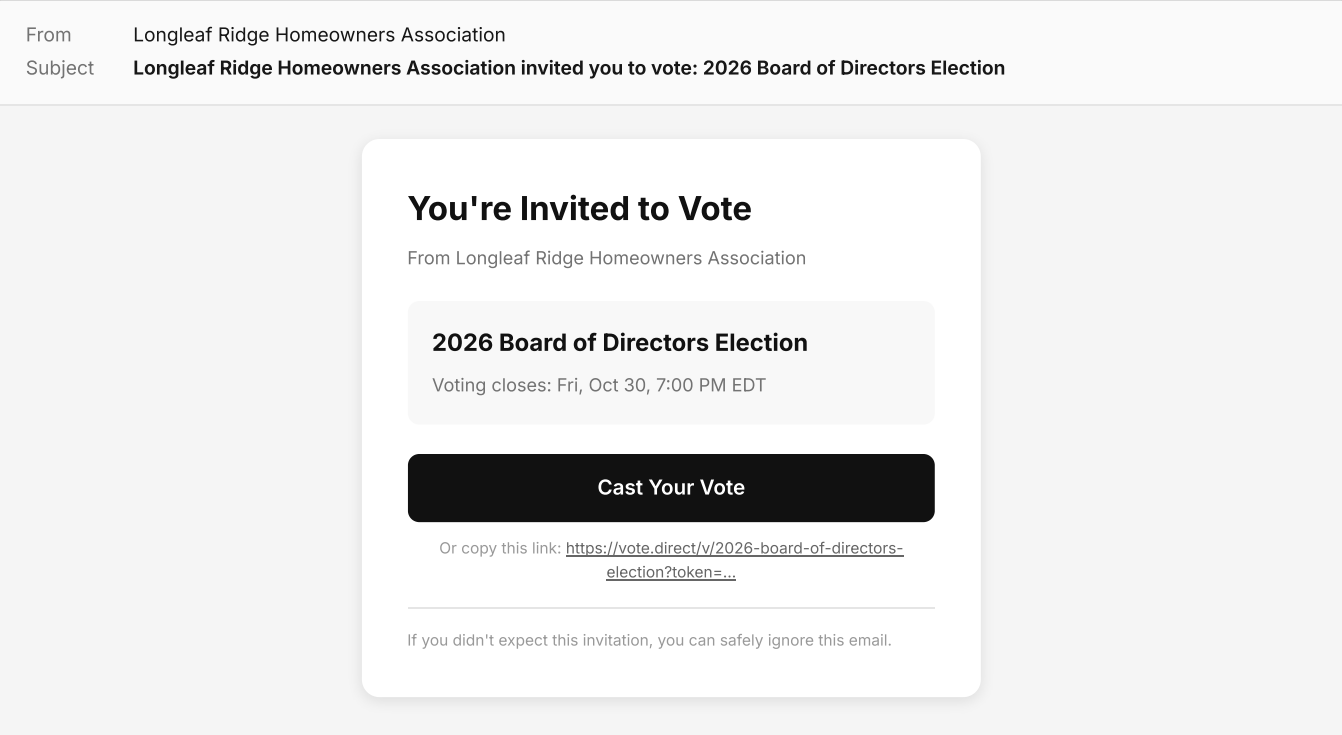


FIGURE 8.5 The invitation Harold Jensen receives. The button carries his own link.

The reminder email

The reminder's wording follows the calendar day it is sent, counted in the election's time zone:

When it goes out	Tag and heading	Subject when yours is blank
Two or more days before the closing day	Reminder: "Your vote is still needed"	Reminder: please vote in {title} by {day and date}, for example "by Friday, Oct 30"
The day before the closing day	Closes tomorrow: "Voting closes tomorrow"	Reminder: {title} closes tomorrow
The closing day	Closes today: "Voting closes today"	Last chance to vote: {title} closes today

Your own subject line replaces the default. Per-unit reminders add the unit to the subject. The button is the voter's own link, the same one their invitation carried.

From Longleaf Ridge Homeowners Association
Subject **Reminder: 2026 Board of Directors Election closes tomorrow**

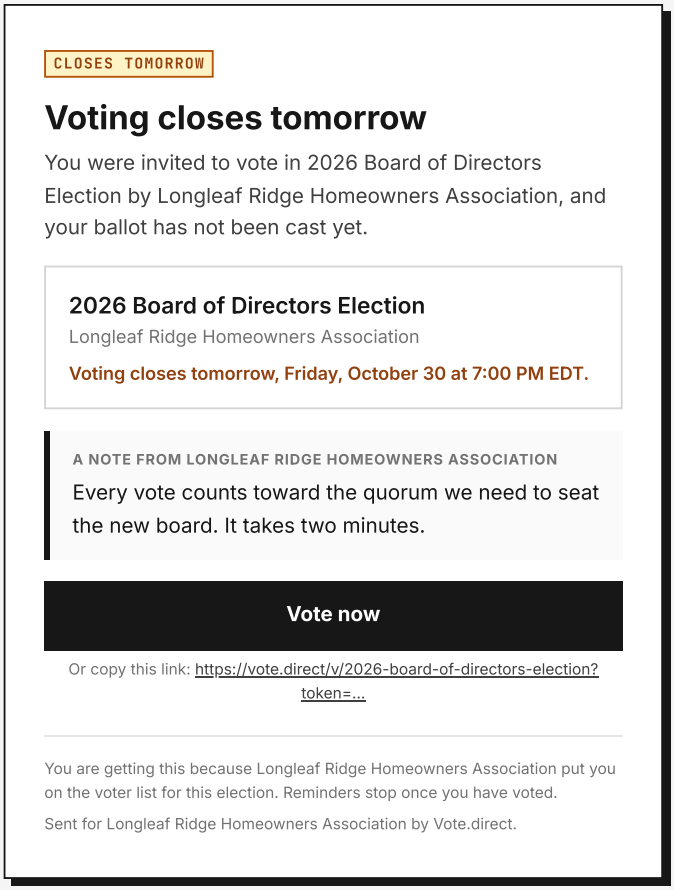


FIGURE 8.6 The "1 day before" reminder, sent Thursday, October 29 at 9:00 AM, with the organization's message.

Text messages

Texts name the organization, the election and the deadline in the election's time zone, and carry the voter's own link. To keep texts short, an organization name is cut at 40 characters and a title at 50, and the title is left out when it matches the organization's name. vote.direct sends three kinds:

- **The invitation**, from the text card or a row's **Text** button. Before voting opens, it says when voting opens and closes and "We'll text you when it opens."
- **"Voting is now open"**, sent when voting opens to text voters who were texted before it opened and have not voted: "{Organization} (via vote.direct): voting is now open in "{title}". Vote by {deadline}: {link} Reply STOP to opt out."
- **Reminders**, when texts are on in the reminder plan. Worded for the time left, like the emails.

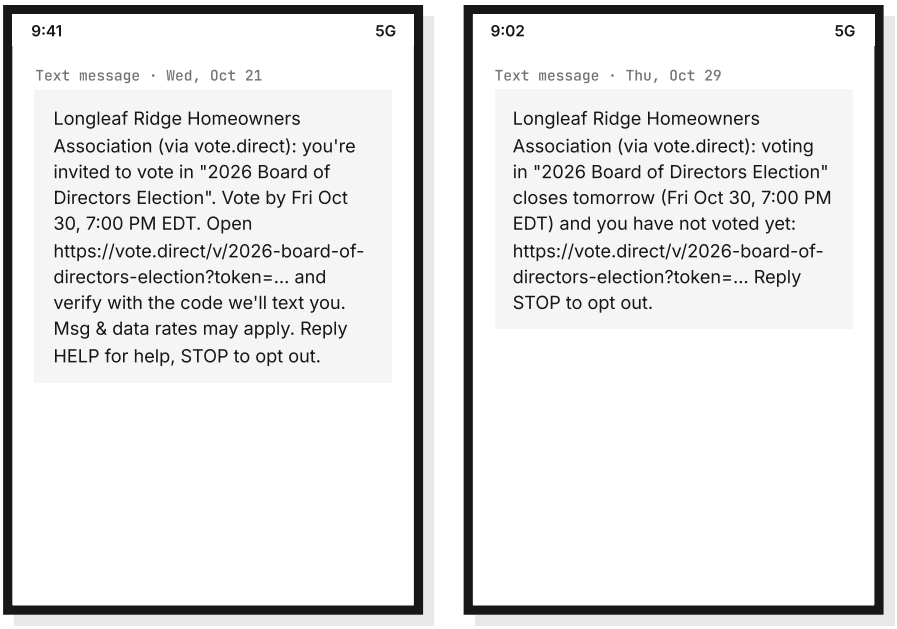


FIGURE 8.7 Grace Okafor's invitation text, and the "1 day before" reminder text.

On the closing day the reminder reads "last chance, voting in "{title}" closes today ({deadline}) and you have not voted yet". Earlier reminders read "reminder, you have not voted yet in "{title}". Voting closes {deadline}."

The printed notice

With **Distribute ballots yourself** on, **Printable notices** builds a PDF with one page per voter, to print and hand out or mail yourself. Each page has a QR code that opens the voter's ballot, the typed address with the election code, and the voter's 6-digit personal code. The opening date appears only while voting has not opened yet.

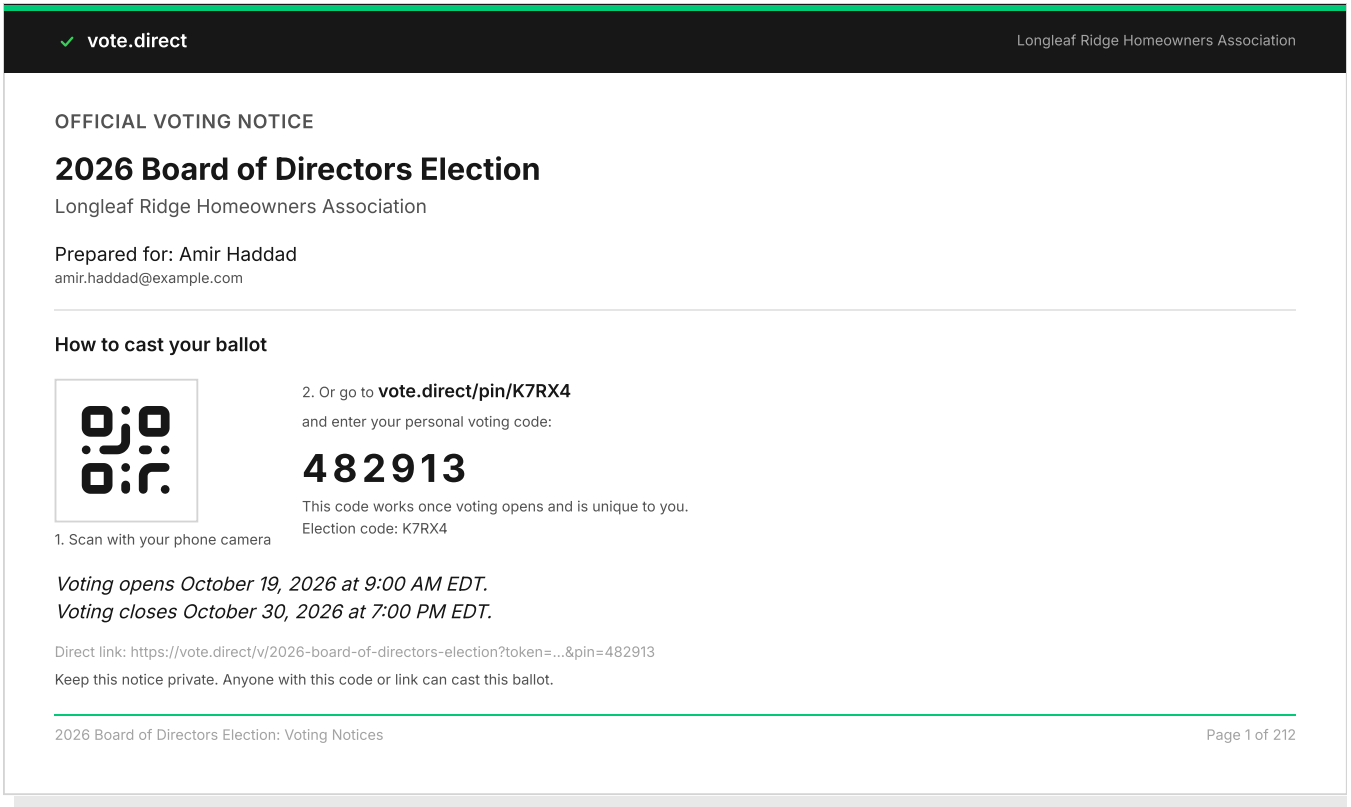


FIGURE 8.8 The first page of Longleaf Ridge's printable notices, printed before voting opened.

Treat the notices like a password list: anyone holding a notice can cast that voter's ballot. Turning off **Distribute ballots yourself** revokes every code. Downloading the notices does not mark anyone as sent (see Other ways to deliver).

CHAPTER 9

What your voters see

Your voters see a different vote.direct than you do. This chapter walks through every email, text and screen a voter meets, in the order they meet them, so you can answer their questions with the exact words on their screen.

IN THIS CHAPTER

- The voter's path at a glance
- The invitation
- The election page
- Private elections: the identity check page
- Proving who they are
- The code email and its button
- Printed notices and Voter ID slips
- The ballot and its question types
- Voting for more than one unit
- When something goes wrong
- The thank-you screen and receipts
- Changing a ballot
- Results, languages and accessibility
- Questions voters ask

The voter's path at a glance

Most voters meet vote.direct for the first time in your invitation. A voter you invited by email takes these steps, each covered in its own section below:

1. Opens your invitation and taps **Cast Your Vote**.
2. Reads your election page: the title, your description and documents, the deadline, and **Vote Now**. When the page has nothing of yours to show, vote.direct skips it.
3. Proves who they are with a 6-digit code. A voter who comes from your invitation types nothing: the code is sent to their address automatically.
4. Answers the ballot, one question per screen, and presses **CAST YOUR VOTE**.
5. Sees the thank-you screen with a confirmation code. A receipt may also be sent by email or text.

Voters you set up for text take the same steps from a text message. Voters with a printed notice or a Voter ID slip skip step 3, because the code they hold is their proof. See Printed notices and Voter ID slips.

> GOOD TO KNOW
>
> Voters meet two kinds of page. The election page and the ballot wear your election's design: your colors, cover image and fonts, with no vote.direct menu. The verification screens, the code pages and the results page add a plain white top bar with the VOTE.DIRECT logo, the words "Verified Voting" and a language menu. A voter who asks whether they have left your election has not: it is the same election.

The invitation

When you send invitations (see Invitations and reminders), each voter is sent a personal link to the election. The link identifies the voter, which is why a voter who uses it never types their email address. Opening it does not use it up, and you can resend it from the **Voters** tab.

The invitation email

The email is sent under your organization's name. Its subject reads "Longleaf Ridge Homeowners Association invited you to vote: 2026 Board of Directors Election", or "You're invited to vote:" followed by the title when the election has no organization name. Inside are the heading **You're Invited to Vote**, a gray box with the election title and the closing time, a black **Cast Your Vote** button, and the same link written out under it.

The closing time is the online deadline. If you set online voting to close before the election itself closes, the email shows the earlier time. When you give owners of several units a ballot for each unit, the email names their units under the title and in the subject line. With **A separate email per unit**, each email names one unit, for example "(Lot 14)" at the end of the subject.

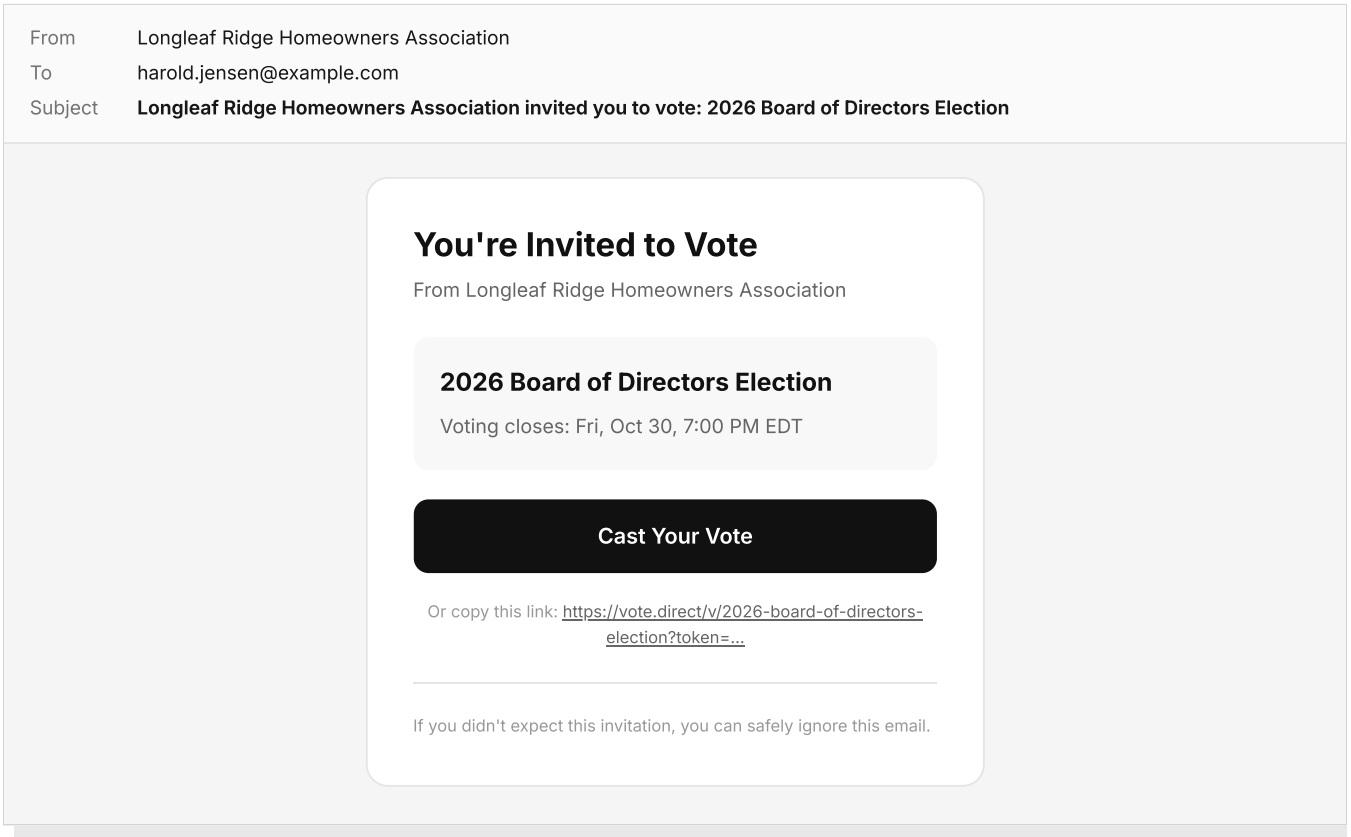


FIGURE 9.1 The invitation email Harold Jensen is sent: your organization's name as the sender, the closing time, and one button that opens his personal link.

The text invitation

Voters you set up for text get a text message instead (see Voters and your roster). If voting has not opened yet, the text names the opening and closing times and promises a second text. When voting opens, vote.direct sends "voting is now open" to each texted voter who has not voted. A text sent while voting is open names the

deadline instead: "Vote by Fri Oct 30, 7:00 PM EDT." The invitation text ends with the rates notice and "Reply HELP for help, STOP to opt out."

The link in a text works like the email link. A voter who replies STOP is sent no more election texts, but a code they ask for on the verification screen is still sent.

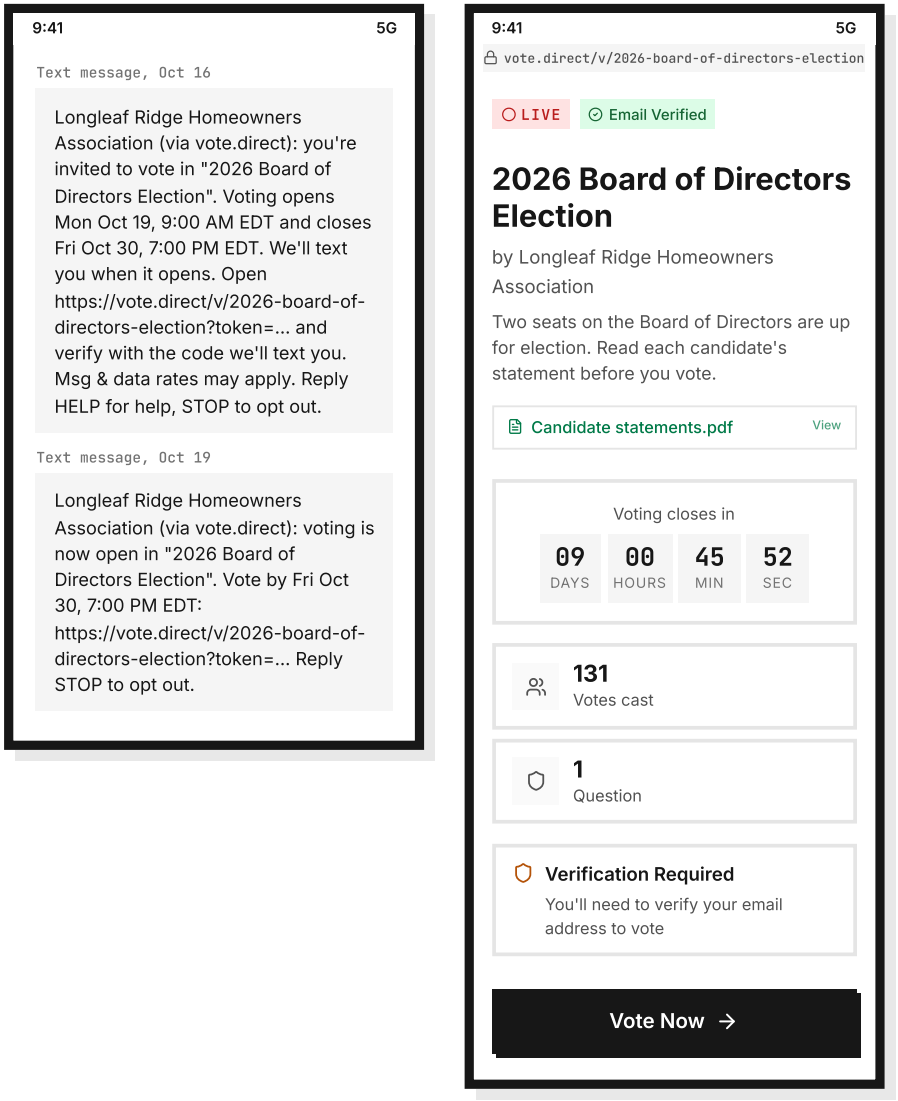


FIGURE 9.2 Left, the two texts a voter set up for text is sent when invitations go out before opening day; right, the election page Harold Jensen sees while voting is open.

Reminders

If you schedule reminders, they carry the same personal link and are sent only to voters who have not voted yet. On the last day the default subject reads "Last chance to vote: 2026 Board of Directors Election closes today". Each reminder explains why the voter is getting it and says "Reminders stop once you have voted." The schedule and wording are covered in Invitations and reminders.

The election page

The invitation opens your election page, at `vote.direct/v/` followed by the election's address, for example `vote.direct/v/2026-board-of-directors-election`. What it shows depends on the moment.

While voting is open

From the top, as on the right-hand phone in the figure above:

- Your cover image, if you added one.
- A red **LIVE** tag and a green tag naming how voters prove who they are: **Email Verified**, **Phone Verified** or **ID Verified**.
- Your title, "by" and your organization's name, your description and your documents. A document opens in a viewer on top of the page, with **Open in new tab** for phones that cannot show it there.
- A countdown headed "Voting closes in", in days, hours, minutes and seconds. If online voting closes before the election does, the countdown runs to that moment instead and reads "Online voting closes in".
- Two boxes: the number of ballots cast so far, labeled **Votes cast**, and the number of questions. Counts of 1,000 or more are shortened, for example 1.2K. On an Anonymous ballot, until the number set in **Minimum votes before results show** is reached, the first box reads "Votes are being collected" and "Results available soon" instead. If you keep turnout from voters (see Ballots in Settings), there is no Votes cast box and the questions box takes the whole row.
- A box headed **Verification Required**: "You'll need to verify your email address to vote", or "You'll need to verify your phone number via SMS".
- A black **Vote Now** button. If **Show results during voting** is on, an outlined **View Live Results** button sits under it.

Before voting opens

Until the opening time the tag reads **SCHEDULED** and the page becomes a preview, shown on the left in the figure below: a dark panel with your organization's name, **Voting Opens Soon**, the opening time and a countdown; four tiles named **Opens**, **Closes**, **Verification** and **Ballot**; and a **How to Vote** card. In place of Vote Now there is a gray **Voting Not Yet Open** button with "This page will update automatically when voting begins". It does: once the opening time passes, an open page turns into the live page without the voter doing anything.

The **Ballot** tile tells voters how private their ballot is before they vote: "Identified", "Secret ballot" or "Sealed ballot", matching your **Ballot secrecy** choice of Identified, Anonymous or Sealed. The How to Vote card has three numbered steps:

1. "When voting opens, enter your email on this page" on an election limited to your voter list, or "When voting opens, visit this page and click "Vote Now"" on an open one.
2. "Verify your identity via email: you'll receive a secure link", or "Verify your identity via SMS: you'll receive a one-time code".
3. "Cast your vote: 1 question on the ballot". On an Anonymous ballot it reads "Cast your anonymous vote".

A last line suggests "Bookmark this page: it will become your ballot when voting opens".

After voting closes

The tag reads **CLOSED** and a card says "Voting has ended", "Closed on Oct 30, 2026" and how many ballots were cast, for example "171 votes were cast", as on the right in the figure below. If **Show results after closing** is on, a **View Results** button follows. If it is off, the card ends "Thank you to everyone who participated." The count is left out on an Anonymous ballot that closed below your minimum, and on every election of yours when you keep turnout from voters.

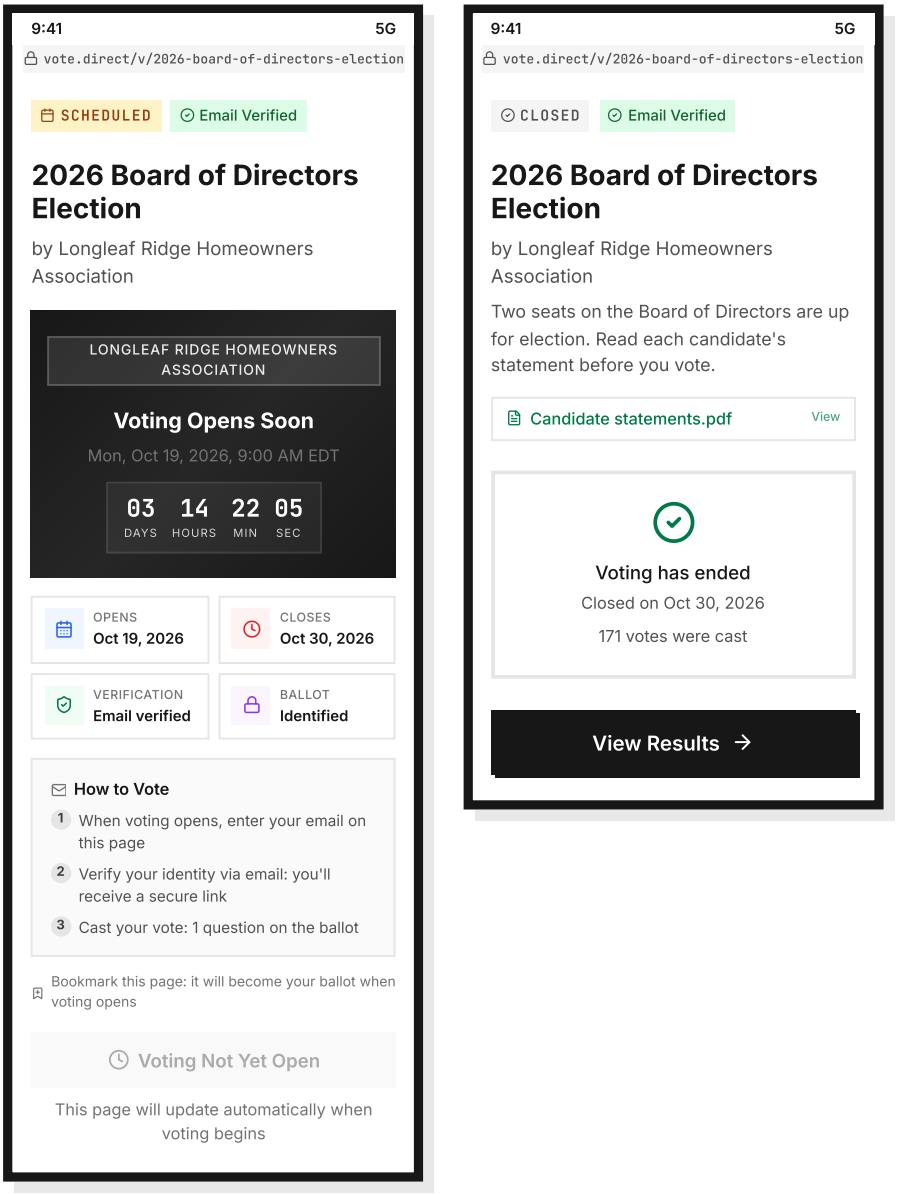


FIGURE 9.3 The same election page before voting opens (left), with its preview tiles and How to Vote card, and after voting closes (right), with the ballot count and View Results.

When online voting closes early

You can stop online voting before the election closes, for example when your meeting is called to order, with **Online voting closes** in the Schedule group on the **Settings** tab. After that moment the election page shows a clock with "Online voting has closed" and "Online voting closed on Oct 30, 2026, 5:00 PM. Ballots may still be

cast in person or by paper as described in the election notice." There is no Vote Now button. A voter already on the ballot sees the same message in place of the questions, and the verification screens stop sending codes. See Paper, mail and in-person ballots.

Notices above the title

A few notices appear at the very top of the election page, above everything else:

Notice	When it appears
"You have already voted in this election. Your ballot was recorded."	The voter used a code link from an email after their ballot was cast.
"This link no longer works. Type your email on this page to get a fresh code."	The voter used a code link that expired or was replaced by a newer code. It appears only while online voting is open.
"This link has been opened too many times from your network. Type your email on this page to get a fresh code."	The same code link was opened many times from one network.
"There was a problem with your ballot link. Try entering your code manually at vote.direct/pin."	A printed notice's QR code could not open the ballot.
"Your voting code is valid. Voting opens Mon, Oct 19, 2026, 9:00 AM EDT. Come back then, or keep this page open and your ballot will load automatically."	The voter scanned a printed notice before voting opened.
The translation line and the TEST BALLOT banner	See Languages and Test ballots.

When voters go straight to the verification screen

If your election page has no description, no attached document and no cover image, a voter who opens their invitation while voting is open skips it and goes straight to the verification screen. The deadline still shows there. Add a description or a document if you want every voter to see something first.

Private elections: the identity check page

An election limited to your voter list is private. When someone opens its address without a personal link, for example a link a neighbor forwarded or one typed from your newsletter, vote.direct shows an identity check page in place of the election page. The voter proves they are on your list before the ballot opens.

The page is a card with the election title and your organization's name at the top, then a box headed **About this decision**:

- **Purpose**: your description.
- **Deadline**, for example "October 30, 2026 at 7:00 PM EDT", and **Ballot overview**, for example "1 question".
- "Eligibility is based on the private member list supplied by Longleaf Ridge Homeowners Association." and "Your contact detail is checked only to match you to that list and send a one-time code."

- A line about ballot privacy that matches your Ballot secrecy setting. On an Identified ballot it reads "This organizer has configured an identified ballot." On an Anonymous ballot it reads "Your ballot choices are recorded separately from your verified identity." On a Sealed ballot it says the ballot is stored with no link to the voter and the tally opens when voting closes.
- "If you believe the list is wrong, contact the organizer or visit Support."

Under the box, the voter types the email address you hold for them in **ENTER YOUR EMAIL TO VOTE** and presses **CONTINUE**. If your election also verifies by text, a link reads **Use my mobile number instead**, and a voter who came from a text message starts on the mobile field, **ENTER YOUR MOBILE NUMBER TO VOTE**.

Every voter then reads the same line: "If you are an eligible voter, you'll receive an email with a verification code." The page says this whether or not the address is on your list, so it never reveals who is on it. A code is sent only to an address on this election's list, and not to a voter who has already voted. This code email has no button: the voter types the six digits in **VERIFICATION CODE** and presses **VERIFY**, with **Change email** and **Resend code** underneath. The ballot opens next. Wrong or old codes read "Invalid verification code", "Verification code expired. Please request a new one." or "Too many attempts. Please request a new code."

Before voting opens, the page sends the voter to the election page and its preview. After voting closes it shows the title and "This vote is not currently open."

Proving who they are

Before the ballot opens, each voter proves who they are with a one-time code sent to an email address or mobile number on your list. The verification screen is a single card. Its top bar reads **IDENTITY VERIFICATION** on the left and **STEP 01 OF 02** or **STEP 02 OF 02** on the right. Under it are a thin stripe in your election's color, then your organization's name and the election title, so voters can see who is asking before they type anything. The bottom line reads **Secured by Vote.Direct** beside two progress dots. Above the card, the page's top bar has a **Back** link to the election page and three numbered steps, Verify, Vote and Done; on a phone only the numbers show.

Step 1: an email address or a mobile number

The card asks **Enter your email**, "We'll send you a verification code to confirm your identity.", or **Enter your phone number**, "We'll send you an SMS with a verification code." Under the heading, a line in capitals gives the deadline, for example **CLOSES OCT 30, 7:00 PM EDT**, so a voter who skipped the election page still sees it.

- Email: one field labeled **EMAIL ADDRESS**.
- Phone: a country menu beside the number field. It lists 12 countries, with the United States and Canada (+1) first. Under the field: "Enter the mobile number where you can receive a text message. Include your area code." and a paragraph in which the voter consents to the code and election notices by text.
- The button is **SEND ACCESS CODE**. Under it: "Questions? Contact whoever sent you this ballot."
- When your election accepts both email and text codes, a link switches between them: **Prefer SMS? Verify by phone instead** or **Verify by email instead**.
- At the bottom: "Your email will only be used to verify your identity for this vote. By continuing, you agree to the Terms of Service and Privacy Policy." The phone version names the phone number.

Voters who come from their invitation

A voter who opens the link in their invitation email types nothing. The screen knows their address from the link, sends the code at once, and opens on step 2. They see step 1 for only a moment, with the button reading "Sending code...".

Voters you set up for text

When your roster sets a voter to text (see Voters and your roster), their link opens the phone version of step 1 and adds: "Your organization set you up to vote by text. Use the mobile number ending in 0187." The voter types their number; vote.direct does not fill it in. The setting chooses which screen opens, not which code the voter may use: a voter whose number has changed can press **Verify by email instead**, and an email code works when your list has an email address for them.

The code text reads: "vote.direct: Your verification code is 617204. It expires in 30 minutes. Reply HELP for help."

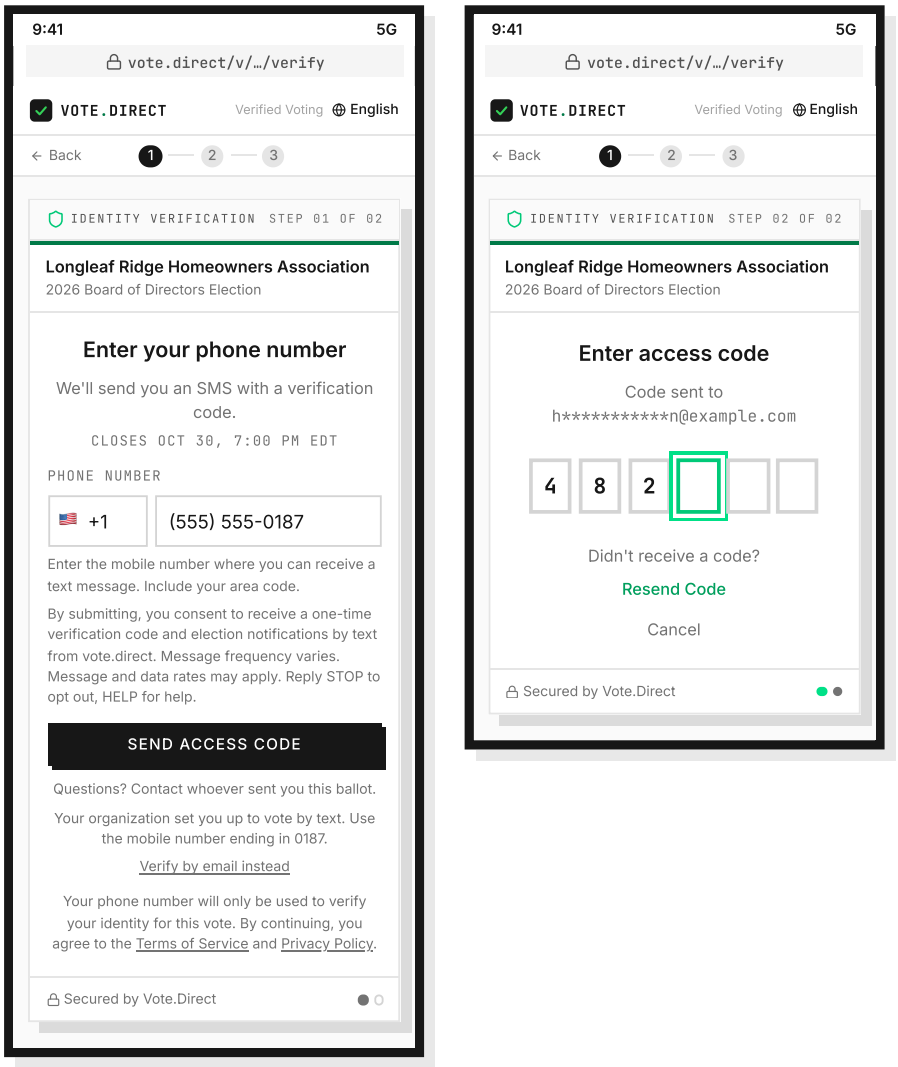


FIGURE 9.4 Step 1 for Thao Nguyen, whom the roster sets to vote by text (left), and step 2 for Harold Jensen, who came from his invitation and never typed his address (right).

Step 2: the six-digit code

Step 2 reads **Enter access code** and "Code sent to h**********n@example.com", or "Code sent via SMS to +1 ***-***-0187": part of the address is hidden with stars. Six boxes take the digits. The voter can type them or paste the whole code, and the last digit sends it without a button.

- **Resend Code** (or **Resend SMS**) sits under "Didn't receive a code?". After a resend it counts down, for example **Resend in 59s**, before it can be pressed again.
- A code works for 30 minutes from when it was first sent. Pressing resend while it is still good sends the same code again, so a voter holding two code emails can use either one.
- Each code allows three tries. A wrong code shows "Invalid code. 2 attempts remaining." with a **TRY AGAIN** button. After three wrong tries the code stops working: the next try reads "Too many attempts. Please request a new code." A code older than 30 minutes reads "Verification code has expired. Please request a new one." Either way the screen says "You'll need a new code to continue." and offers **REQUEST NEW CODE**.
- One address or number can be sent at most five codes in 15 minutes. After that the voter reads "Too many codes sent to this address. Please wait a few minutes and try again."
- **Cancel** returns to step 1, where the voter can correct the address.

Success

When the code matches, the card's border and stripe turn green, the corner reads **VERIFIED**, and a stamp says **IDENTITY VERIFIED** with "Your identity has been confirmed. Redirecting to your ballot." Then the ballot opens.

The ballot opens only in the browser where the code was entered. If the voter moves to another phone or computer, they confirm their address again there; see When something goes wrong.

> GOOD TO KNOW
>
> If your election uses a government ID check arranged with our team, voters enter their email, then photograph their ID and take a selfie in a separate secure tab, instead of typing a code.

The code email and its button

A voter invited by email is sent two emails from your election: your invitation, and then, when they reach the verification screen, a code email. Tell voters to expect both. The code email is sent as "Longleaf Ridge Homeowners Association via vote.direct" with the subject "Your verification code from Longleaf Ridge Homeowners Association". It carries the six digits and a black **Verify and continue voting** button, and says "This link and code expire in 30 minutes." The voter can type the code on the verification screen or tap the button. Either one opens the ballot.

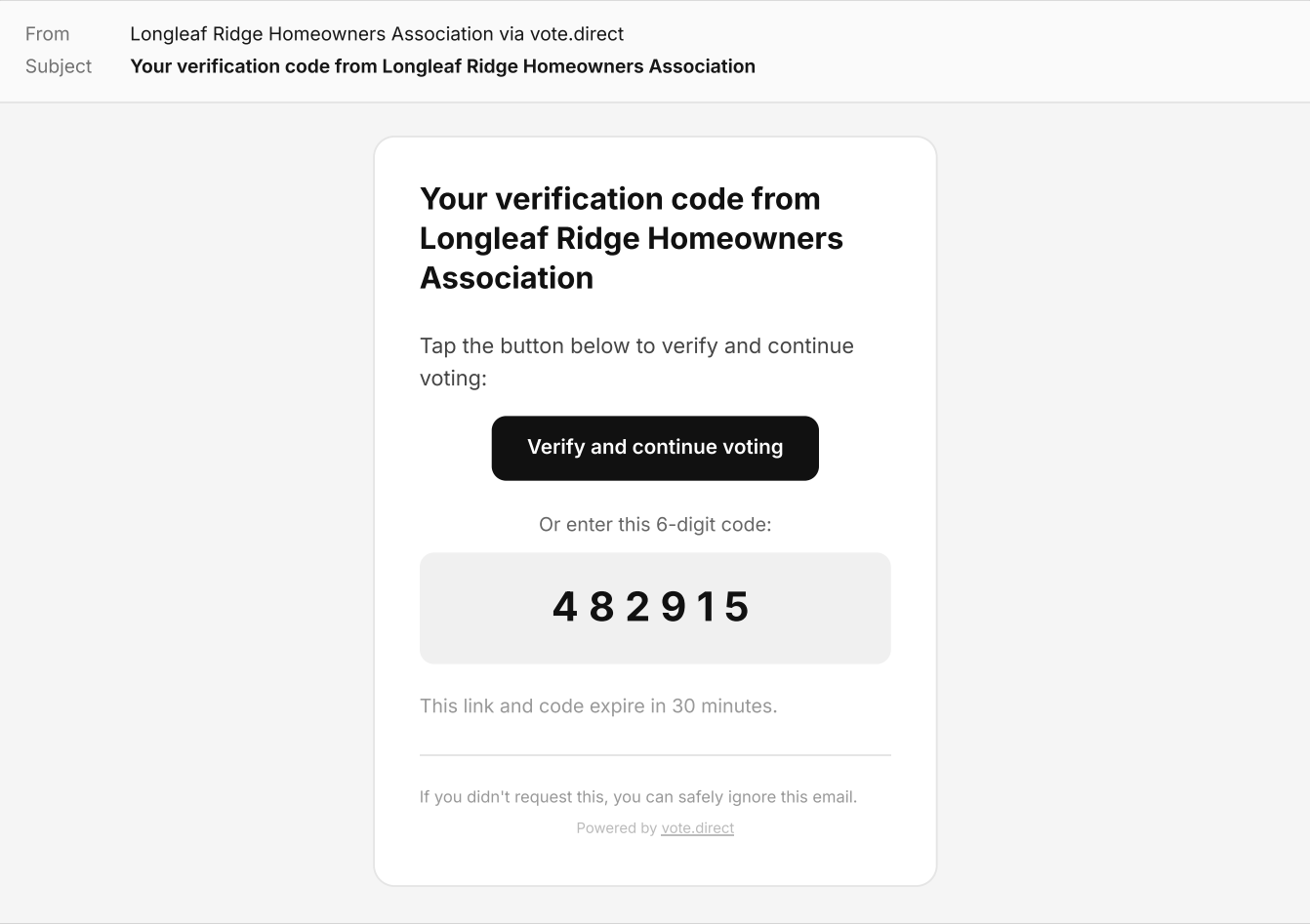


FIGURE 9.5 The code email Harold is sent when he reaches the verification screen: he can type the six digits there or tap Verify and continue voting.

Why the button leads to one more button

Some workplace and school email systems open every link in an incoming message to check it for danger. If opening the link were enough to use the code, such a system would spend the voter's code moments after it was sent, and the voter would then be told their code no longer works. So the button opens a page that does nothing on its own, shown on the left in the first figure of the next section. It shows your organization's name, the election title, "Tap the button to open your ballot. This step makes sure it is you opening the link, not your email provider's security scanner." and **CONTINUE TO MY BALLOT**. Only a person's tap opens the ballot, in the browser where they tapped. Under the button: "If you did not ask for this, close this page. Nothing happens until the button is tapped."

The button keeps working until the code expires, and it can be used more than once in that time, for example after a double tap or on a second device, until the voter has voted. When it can no longer open a ballot, the page says why and offers **GET A NEW CODE**, which returns to the election page:

Heading	What it says
This link has expired	"Verification links and codes expire for your security. Get a new code and use the newest email."

Heading	What it says
This link was already used	"If you opened your ballot from it, go back to that tab or window. Otherwise, get a new code."
This link no longer works	"A newer code may have replaced it. Use the newest email, or get a new code."

A voter who has already voted is taken to the election page instead, which says "You have already voted in this election. Your ballot was recorded."

Printed notices and Voter ID slips

If you hand out or mail printed notices (see Invitations and reminders), each voter's notice carries a QR code, the address `vote.direct/pin/H7RQ4` (your election's 5-character code follows /pin), and a 6-digit personal voting code. It also says "This code works once voting opens and is unique to you." and "Keep this notice private. Anyone with this code or link can cast this ballot." The code is the voter's proof: there is no email step and no code to wait for.

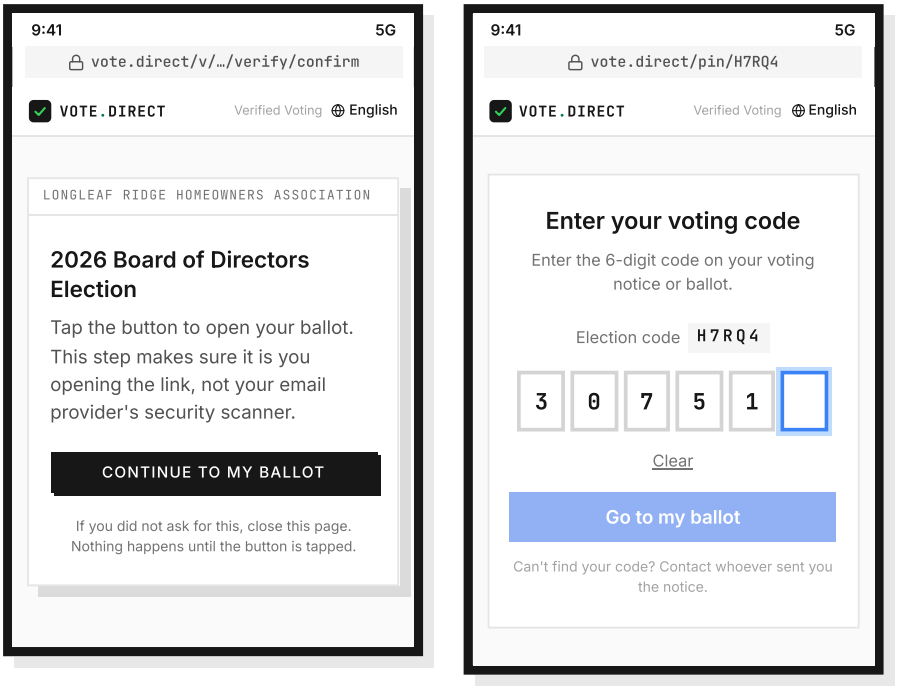


FIGURE 9.6 Left, the page the code email's button opens, where nothing happens until the voter taps CONTINUE TO MY BALLOT; right, Lucy Chen typing the code from her printed notice at vote.direct/pin.

Typing the code at vote.direct/pin

The page reads **Enter your voting code**, "Enter the 6-digit code on your voting notice or ballot." The election code from the address shows as a badge beside **Election code**, so the voter types only the six digits, and the last digit sends them. The page then says "Ballot found, taking you there now..." and opens the ballot. **Clear** empties the boxes; after an error they empty on their own so the voter can type the code again. The blue **Go to my ballot** button also sends a complete code. The help line reads "Can't find your code? Contact whoever sent you the notice."

A voter who types only `vote.direct/pin` is asked for the election code when it is needed: "Almost: we also need the election code from your notice. It's the short code in the web address, just after /pin."

Message on vote.direct/pin	What it means
"Code not recognized. Double-check the 6-digit code on your notice or ballot."	The six digits do not match a voter in this election.
"Your voting code is valid, but voting hasn't opened yet. Come back on October 19, 2026 at 9:00 AM EDT."	Voting has not opened. The date shows in the election's time zone.
"This vote has ended, so your voting code is no longer valid."	Online voting is closed, either because the election closed or because online voting closed early.
"Too many attempts. Please try again in 15 minutes."	Ten tries came from one network within 15 minutes.
"Network error. Please check your connection and try again."	The phone or computer lost its connection.

Scanning the QR code

Scanning a notice's QR code with a phone camera opens the election with the voter's code already in it. While voting is open, the voter lands on the ballot, ready to vote. Before opening day, the election page shows the preview with a blue line: "Your voting code is valid. Voting opens Mon, Oct 19, 2026, 9:00 AM EDT. Come back then, or keep this page open and your ballot will load automatically." If the code cannot be used, an amber line reads "There was a problem with your ballot link. Try entering your code manually at vote.direct/pin."

Signing in at vote.direct/signin

If you gave voters a Voter ID and password instead, they go to `vote.direct/signin`. The page reads **Voter sign-in**, "Enter the Voter ID and password from your credential slip or notice." The fields are **Voter ID**, which shows "e.g. unit-12" as an example, and **Password**, the 6-digit password. The button is **Go to my ballot**. Under it: "Only have a 6-digit voting code? Enter it at vote.direct/pin" and "Can't find your credentials? Contact whoever sent them to you." A wrong pair reads "We couldn't find a ballot matching that Voter ID and password. Double-check both against your slip."

> GOOD TO KNOW
> Voters who use a printed code or a Voter ID are not sent a receipt message. Their proof is the confirmation code and the certificate on the thank-you screen.

The ballot

The ballot wears your election's design and carries no vote.direct menu and no advertising. From the top, as in the figure below:

- A countdown to the deadline, such as "09d 00h 45m 52s". If the election closes while the voter is on the ballot, they are taken back to the election page, which says voting has ended. If online voting closes first, the questions give way to the "Online voting has closed" message.
- A card with your organization's name in small capitals, the title, your description and your documents.

- A green banner, **Identity Verified**, with the election's method underneath, such as "Verified via email".
- On a ballot with more than one question, a progress line such as **QUESTION 1 OF 3** with a percentage and a bar, and the question's number, for example 01 / 03, above each question.
- The question, its description, a **REQUIRED** tag when an answer is required, and any hint for the question type.
- At the bottom, **BACK** on the left and **NEXT** on the right. On the last question the right button reads **CAST YOUR VOTE**.

Moving through the ballot

- One question shows at a time. **NEXT** stays gray until a required question is answered. A question without the REQUIRED tag can be skipped.
- Picking an answer on a one-choice, yes-or-no or rating question moves to the next question on its own after a moment, with a short bar and "Next question...". This does not happen on the last question.
- **BACK** returns to the previous question with its answer kept.
- On a keyboard, Enter does the same as **NEXT** once the question is answered.
- Nothing is recorded until the voter presses **CAST YOUR VOTE** and the thank-you screen appears. While the ballot is being sent, the button reads **CASTING...** and cannot be pressed twice.
- If you turned on **Randomize option order**, each voter sees the answers in an order of their own. The same voter gets the same order each time.

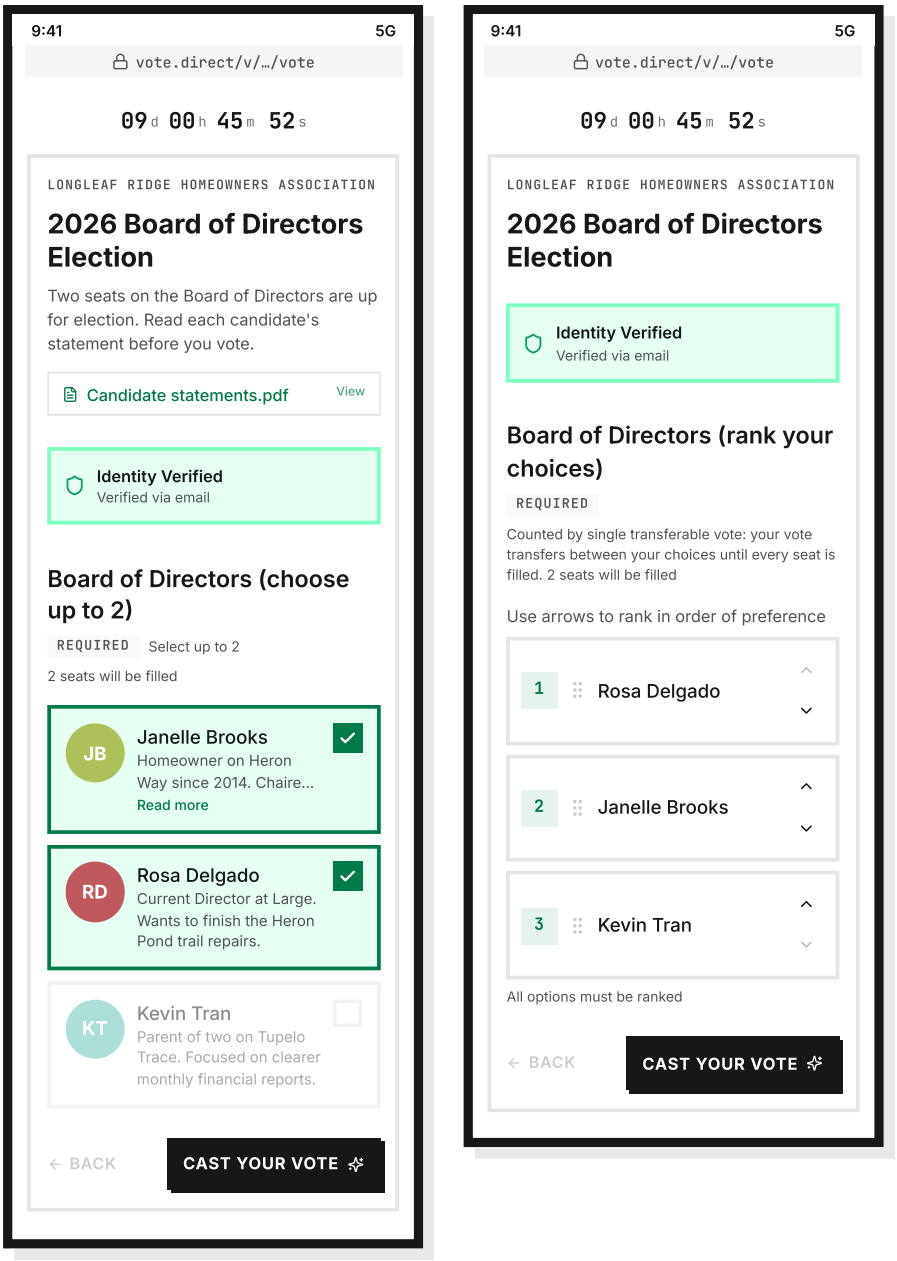


FIGURE 9.7 Harold's ballot with two of the three candidates picked, so the third is dimmed until he removes one (left), and the same two seats drawn as a ranked question (right).

Question types as the voter sees them

The way you set up each question decides what the voter sees (see Ballot questions and voting methods):

Question type	What the voter sees	How they answer
One choice, and Yes or no	Full-width answer rows, each with a square at the right that fills with your color and a white check when picked. A Yes or no question offers Yes and No, plus Abstain if you added it.	Tap one answer. The ballot moves to the next question by itself.
Candidates with photos and bios	Each candidate's photo in a circle, or their initials on a colored circle when there is no photo, then the name and the first two lines of the bio, with **Read more** for a longer one.	As for the question type the candidates belong to. Tapping Read more opens the bio without picking the candidate.

Question type	What the voter sees	How they answer
Multiple choice	Square boxes, "Select up to 2" beside REQUIRED, and "2 seats will be filled" when the limit is 2 or more.	Tap to tick and untick. At the limit, the other answers dim and take no tick until one is removed.
Approval	Square boxes and "Select every candidate you approve of".	Tick every candidate the voter approves of.
Ranked	A numbered list with up and down arrow buttons on each row, "Use arrows to rank in order of preference", a line naming the counting method, and "All options must be ranked".	Move choices with the arrows. The order on screen when the voter moves on is the ranking recorded, so tell voters to arrange every choice first.
Scored	A row of numbered buttons for each candidate, 0 to 5 unless you chose another top score, with "Score each candidate from 0 to 5" and "Leave a candidate unscored to skip them".	Tap a score. Tap it again, or **Clear score**, to take it back. A 0 is a real score.
Cumulative	A bar that stays in view, "Votes remaining" with a count such as "3 of 3", and a minus button, a number and a plus button for each candidate. Where you size the pool by each voter's share, an owner of more units gets more votes.	Spread the votes, all on one candidate or split. On a required question the voter places at least one vote, and every vote when you require the full pool.
Write-in	Under the answers, **Add write-in candidate** opens a box, "Write in a candidate", with an X to remove it.	Type a name. Each write-in counts as one of the voter's choices, including toward "Select up to".
Rating	Numbered buttons, 1 to 10 unless you set another range, with "Low" and "High" at the ends, or your own end labels.	Tap a number. The ballot moves on by itself.
Open text	A large box with "Share your thoughts..." or your own prompt, and a counter such as "0 / 2000" that turns into "Limit reached".	Type an answer, up to 2,000 characters unless you set another limit.

On a ranked question, the counting-method line reads one of these:

- "Counted by instant runoff: the last-place candidate is eliminated round by round until one holds a majority."
- "Counted by single transferable vote: your vote transfers between your choices until every seat is filled."
- "Counted by Borda points: each position in your ranking awards points, and the highest totals win."
- "Counted head-to-head: the winner is the candidate who beats every other in one-on-one comparison."
- "Counted as a two-round runoff: if no candidate holds a majority, all but the top two are eliminated at once and your vote moves to whichever of them you ranked higher."

The Your information step

If you turned on **Collect name**, **Collect email** or **Collect address**, the ballot ends with one more step. The progress line reads **YOUR INFORMATION**, and the step is headed **Almost there** with "The vote organizer has requested the following information." The fields are **Full Name**, **Email address** and **Mailing Address** (street address, city, a state menu and ZIP). Every field you collect must be filled in, and an email address that is not complete stops the voter with "Please enter a valid email address." On an owner's ballots for several units, the step appears only on the first ballot.

The electronic signature

If you turned on **Require electronic signature** on the wizard's first step, or **Electronic signature** on the election page (Settings tab, Ballot options), a box sits above the cast button on the last step, as on the right in the first figure of the next section. It reads **ELECTRONIC SIGNATURE**, **Sign your ballot**, and "This election requires each ballot to carry the voter's name, address and signature. Typing your name below is your electronic signature." The voter types their **Full legal name** and **Address or unit**, then ticks a box beside: "I certify that I am the owner of record or the authorized voter for the address/unit shown, that I am casting this ballot myself, and that typing my name here is my electronic signature." The cast button stays gray until all three are done. The receipt and the certificate say only that a signature was captured; they never show the name or address. On an election with identified ballots, the **Per-voter** download lists the name and address each voter typed and when they signed.

When a ballot that must be signed also carries documents, it opens with a step headed **Review the documents**: "Before you vote and sign, open each document and read it to the end. Then tick the box to confirm you reviewed it." Each document reads **Not reviewed yet** until the voter opens it, reads to the end (a **Scroll to bottom** button jumps there) and ticks **I confirm I've reviewed this document**. It then reads **Viewed**, and the ballot moves on only once every document does. The voter votes next and signs last, so the signature covers the documents and the vote above it.

Voting for more than one unit

When your election gives one ballot per unit (the **One ballot per unit** setting; see Voters and your roster), what a voter sees depends on how many units they own and how you set **Owners of more than one unit**.

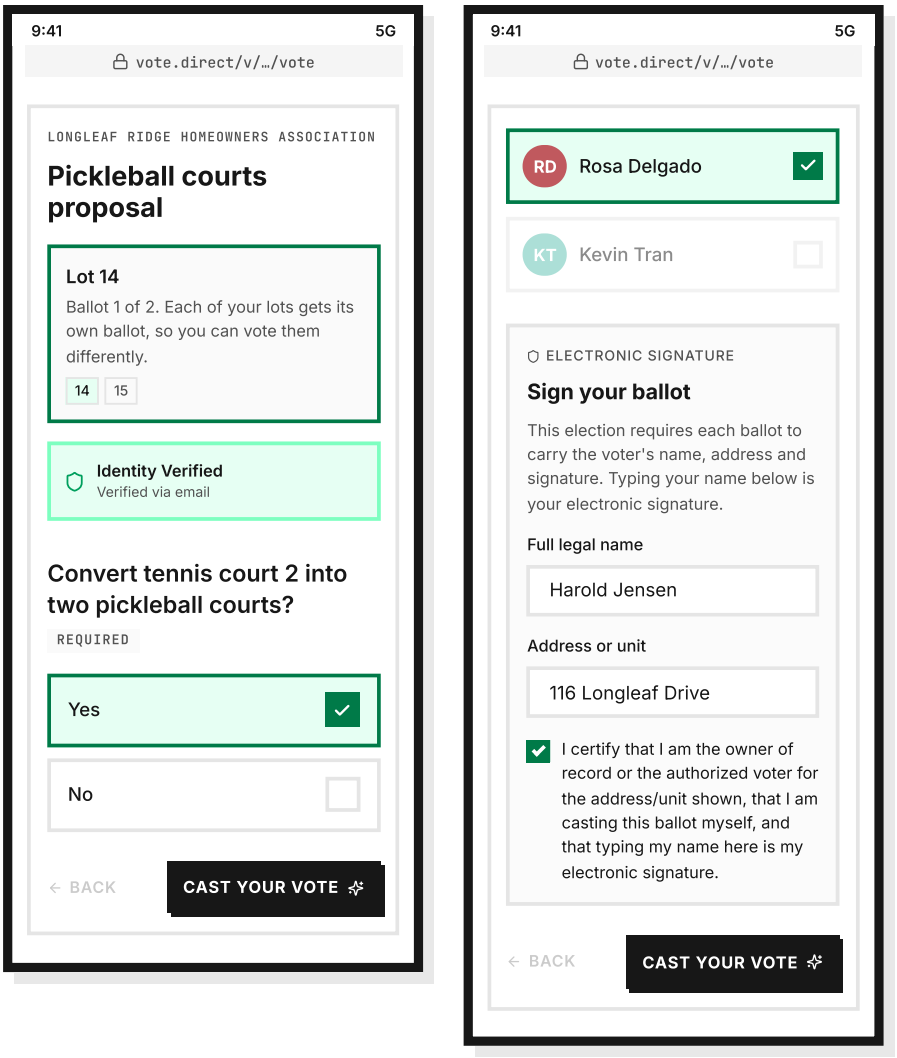


FIGURE 9.8 Left, Frank Russo, who owns two lots, on the first of his two ballots for the pickleball proposal; right, the bottom of Harold's ballot with the electronic signature filled in above the cast button.

One ballot for all of their units

With **One ballot for all of their units**, an owner of several units votes once. A box above the questions reads **You are voting on behalf of:** with a tag for each unit, such as "Unit 14" and "Unit 15", and "Your vote carries a weight of 2". The tags always say "Unit", whatever your roster calls a unit. If a co-owner has already voted some of the units, the box adds **Already voted:** with a line for each, for example "Unit 15, voted by Grace Okafor on 10/21/2026", and the ballot counts for the units still open.

A ballot for each unit

With **One email, a ballot for each unit**, the owner fills in one complete ballot per unit, one after another, as on the left in the figure above. A box at the top names the unit, such as **Lot 14**, and reads "Ballot 1 of 2. Each of your lots gets its own ballot, so you can vote them differently." with a tag per unit that gains a check mark as each is done. The word for a unit comes from your roster's unit field, so an association that calls them lots sees "Lot". Pressing **CAST YOUR VOTE** on one unit's ballot opens the next one. Nothing is sent until the last, and then all of them are recorded together.

With **A separate email per unit**, each email opens one unit's ballot, which says "This ballot counts for lot 14." The owner can vote one unit now and the others later.

On the thank-you screen, a box names the units recorded, for example "Ballots recorded for 14 and 15", and lists each unit's own confirmation code. After a ballot opened from a separate email it reads, for example, "Ballot recorded for 14" and adds "You still have 1 left to vote: 15. Use the link sent for each one."

Co-owners who share one ballot

Co-owners of the same unit share its ballot, and the first to vote casts it. A co-owner who comes later sees a box in place of the questions: **Your unit has already voted**, a line such as "Unit 14, voted by Harold Jensen on October 21 at 6:14 PM", and "If you believe this is an error, contact the election administrator."

When your roster listed two owners' addresses for one household, each owner is sent an invitation and either may vote. The second learns only on pressing **CAST YOUR VOTE**, which is refused with "This property's ballot has already been cast by Harold Jensen. Each property votes once."

Voting weight

On an election that weighs ballots, the thank-you screen can show the voter's share in a box headed **YOUR VOTING WEIGHT**, for example "2 of 212 total" and "0.9% of total voting power". The certificate repeats it.

Proxy ballots

When proxy voting is on and a voter casts a ballot as another member's proxy, a banner in your election's color sits at the top of that ballot: "Voting as proxy for Thao Nguyen" and "This ballot will be recorded as a proxy vote on their behalf." The ballot counts for the member who named the proxy. The proxy holder still has their own ballot to cast, and casts the ones they hold first. If the member votes themselves before their proxy does, the proxy has no ballot left to cast.

When something goes wrong

Each message below appears on the voter's screen exactly as quoted. Answers already entered on the ballot stay on screen after an error, so the voter can fix the problem and press **CAST YOUR VOTE** again. An error on the ballot shows twice: in a red box above the buttons, and in a short notice headed "Submission failed", at the top of a phone screen or the bottom right of a computer screen.

What the voter sees	What it means	What to tell them
"You are not on the eligible voters list for this election. If you believe this is an error, please contact your board or election administrator."	The address typed is not on this election's voter list.	Check the address on the Voters tab and correct or add it, or ask them to use the address you hold.
"That mobile number is not on this election's voter list. If your organization has a different number on file, try verifying by email instead, or contact your board."	The number does not match your list.	Check the number on the Voters tab, or have them verify by email.

What the voter sees	What it means	What to tell them
"This email/phone has already voted"	A ballot has already been cast with that address or number.	Their ballot is in. The Voters tab shows them as voted. See Can a voter change a ballot?
"Too many codes sent to this address. Please wait a few minutes and try again."	Five codes went to that address or number within 15 minutes.	Wait 15 minutes, then use the newest code.
"Invalid code. 2 attempts remaining."	The digits did not match.	Check the newest email or text. Each code allows three tries.
"Verification code has expired. Please request a new one." or "Too many attempts. Please request a new code."	The code is more than 30 minutes old, or its three tries are used up.	Press REQUEST NEW CODE.
"Too many verification attempts. Try again later."	Many requests came from one network, such as a meeting room's Wi-Fi.	Try again a little later, or on mobile data.
"For your security, confirm your email again on this device to open your ballot."	This browser is not the one that entered the code, or it blocks cookies.	See the next section.
"Your unit has already voted"	A co-owner has already voted every unit this voter holds.	The unit's ballot is cast. The box names who voted and when.
"This property's ballot has already been cast by Harold Jensen. Each property votes once."	A co-owner sharing the household's ballot voted first.	The household's ballot is cast.
"You have already voted"	The voter tried to vote a second time, and vote changes are off.	Their first ballot stands.
"Online voting has closed" or "Online voting has closed for this election"	The online cutoff has passed.	Vote in person or on paper, as your election notice says.
"A lot of ballots are being submitted from this network right now. Wait a few seconds and submit again: your answers are still here."	Many voters on one network pressed cast at the same moment.	Wait a few seconds and press CAST YOUR VOTE again.
"We had trouble loading this vote. Please try again: your verification status is preserved."	The ballot did not load.	Press Try Again. They do not need a new code.

"Confirm your email again on this device"

A ballot opens only in a browser that proved who the voter is. A voter who opens their ballot in a different phone or computer, or whose browser blocks cookies, sees a box: "For your security, confirm your email again on this device to open your ballot." and "This site needs cookies to open your ballot. If your browser blocks cookies, allow them for this site and try again." with a **CONFIRM MY EMAIL** button. It returns to the verification

screen, which waits for the voter to press **SEND ACCESS CODE** instead of sending a code by itself. If this happens as they press **CAST YOUR VOTE**, their answers are kept in that browser tab for 12 hours, and when the ballot opens again it says "Your earlier answers were kept. Check them, then cast your vote."

The thank-you screen

When the ballot is recorded, the questions give way to the thank-you screen, under your election's name and title, as on the left in the figure below. From the top:

- A green square with a white check and widening rings, **Vote Cast!**, and "Your voice has been recorded. Thank you for participating."
- A box headed **CONFIRMATION CODE** with the voter's code, 12 letters and digits such as 3f9a1c07b2de, and a copy button. The code is the voter's receipt.
- On a Sealed ballot, a note under the code says the code is shown only once, on this screen, and is not sent by email or text, so the voter should save it.
- On a weighted election, the **YOUR VOTING WEIGHT** box.
- The turnout line, for example "131 of 212 eligible voters have participated", unless you keep turnout from voters.
- **Download Certificate**.
- **View Results**, only when **Show results during voting** is on.

The screen does not repeat the voter's answers, and nothing in vote.direct shows a voter their answers after the vote.

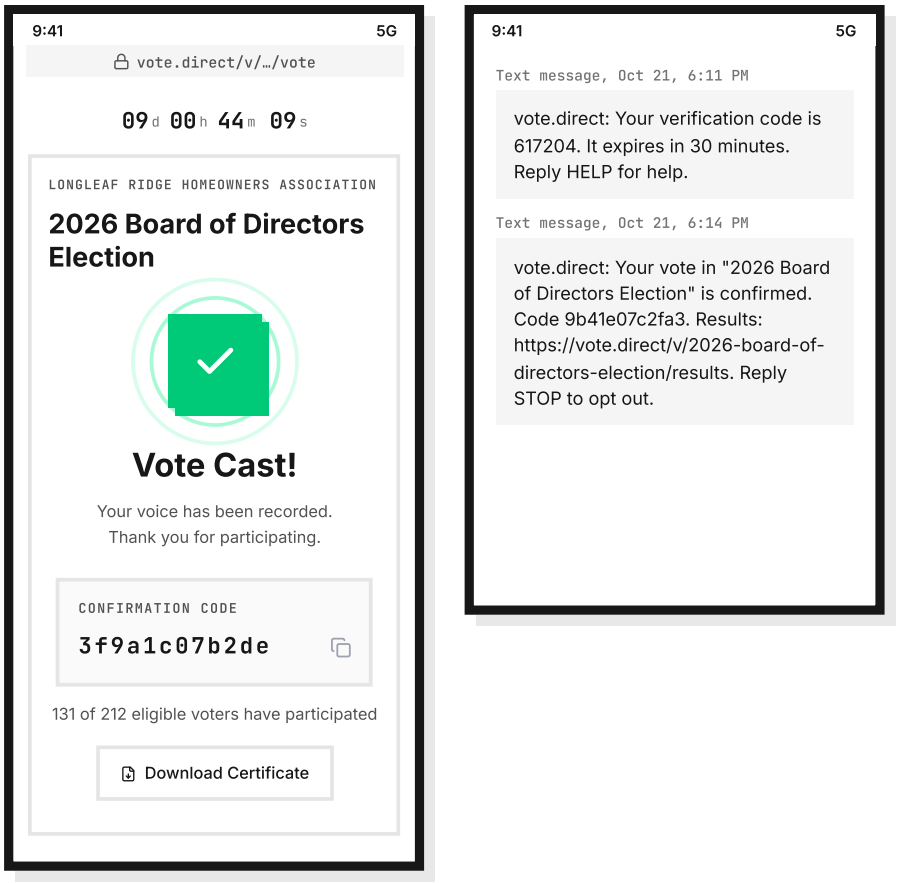


FIGURE 9.9 Harold's thank-you screen with his confirmation code, the turnout line and Download Certificate (left), and the code and receipt texts sent to Thao Nguyen, who verified by text (right).

The turnout line

The turnout line is on by default. To keep turnout between you and your board, open **Settings**, then **Ballots**, turn off **Show turnout to voters**, and press **Save ballot settings**. The switch applies to every election you create. With it off, voters see no count of ballots anywhere: not this line, not the Votes cast box on the election page, and not the participation line on the certificate. The confirmation code, the receipt and the certificate itself stay, and whether voters see results is still each election's own results setting.

The certificate

Download Certificate saves a one-page PDF named after the code, for example vote-confirmation-3f9a1c07b2de.pdf. Headed "Vote Confirmation Certificate", it lists the vote, your organization, the date, the confirmation code as the Reference No., the voter's weight and units on a weighted election, participation (for example "131 of 212 eligible voters", left out when you keep turnout from voters), how the voter was verified, "Electronic signature captured" when there was one, and when the ballot was submitted. On a Sealed ballot it says "Sealed: stored with no link to the voter" and gives only the day the ballot was cast. It does not list the voter's answers.

The button is only on the thank-you screen, so ask voters who want the certificate to download it before they leave the page. If the download fails, a notice reads "Download failed" and "Your confirmation code is the official proof of your vote."

Receipts by email and text

After the ballot is recorded, vote.direct sends a receipt to a voter who verified by email or text, when it holds their address or number for this election.

- An email receipt comes from vote.direct with the subject "Vote Confirmed: 2026 Board of Directors Election (Longleaf Ridge Homeowners Association)", shown in the figure below. It shows the confirmation code and "Submitted Oct 21, 2026, 6:14 PM EDT" in the election's time zone, adds "Electronic signature captured with your ballot" when there was one, and ends "Keep this email as your voting receipt. Your confirmation code is proof of your vote."
- A voter who verified by text is sent a text instead, beginning "vote.direct: Your vote in "2026 Board of Directors Election" is confirmed. Code 9b41e07c2fa3.", shown on the right in the thank-you screen figure above.
- Voters who used a printed code or a Voter ID are not sent a receipt message.
- On an election set to Anonymous or Sealed, vote.direct usually does not keep the address a voter verified with, and then no receipt is sent. The thank-you screen is the one receipt every voter sees.
- A receipt sent on a Sealed ballot never includes the code. It explains that the code was shown once on screen and asks the voter to keep the code they saved.

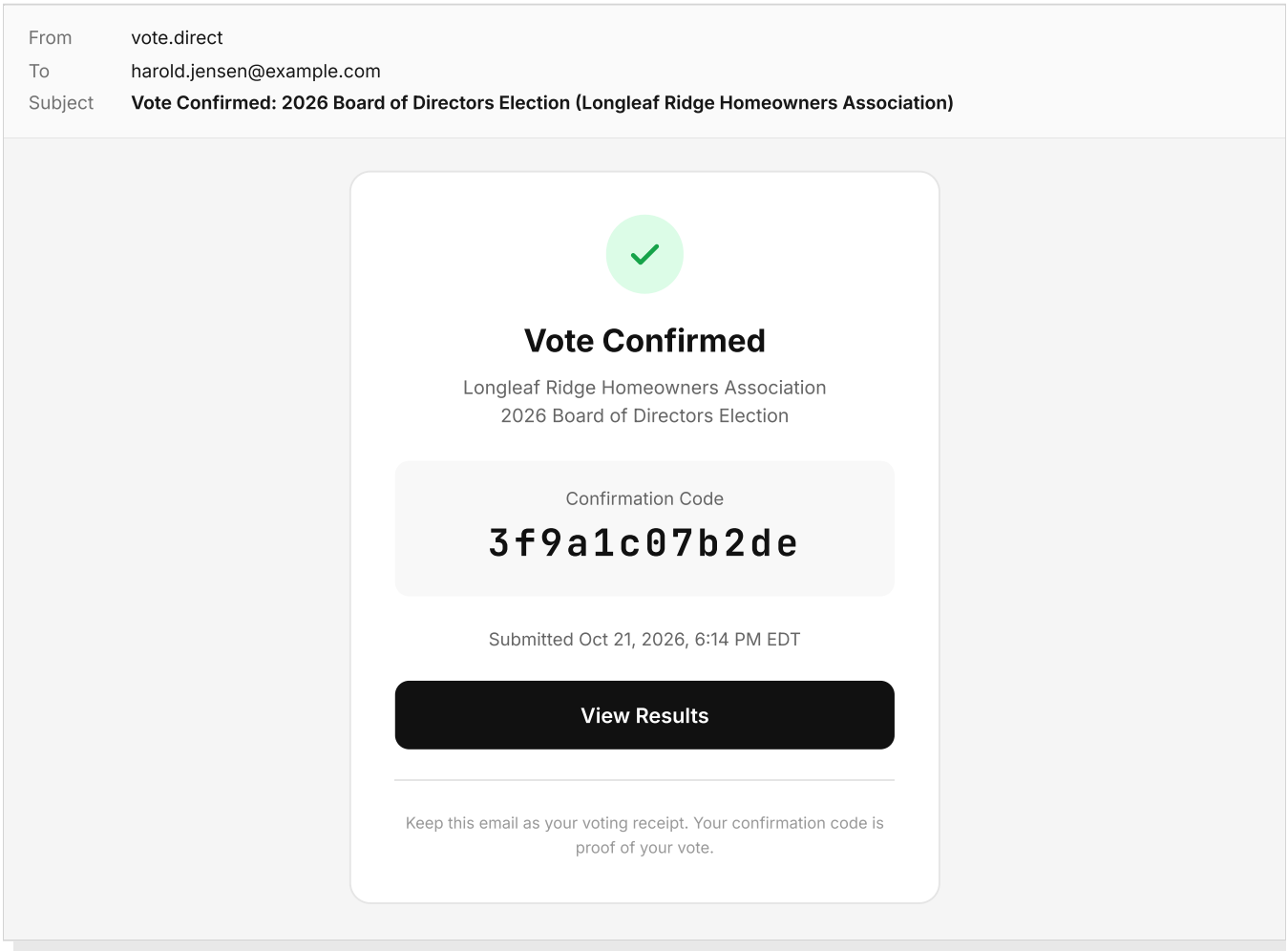


FIGURE 9.10 The receipt email sent to Harold from vote.direct after his ballot was recorded, repeating his confirmation code and the time it was submitted.

Can a voter change a ballot?

A cast ballot is final unless you turned on **Allow vote changes** before voting opened. The switch is on the election page: **Settings** tab, **Ballot options**, **Change**. The wizard always saves it off, and it locks once voting opens. It is never available with Sealed ballots, because a sealed ballot has no link to its voter to find and replace.

With the switch on, a voter can reopen the ballot and change their answers until voting closes, but only in one of two ways:

- From the same browser they voted in, which vote.direct remembers for up to 90 days: for example by reloading the ballot page after voting, or by opening it again from that browser's history.
- By entering their printed voting code again at `vote.direct/pin`, or their Voter ID and password at `vote.direct/signin`.

A voter cannot get back in with a new email or text code. Once someone has voted, the verification screen refuses another code with "This email/phone has already voted", and an earlier code link opens the election page with "You have already voted in this election. Your ballot was recorded." Opening the invitation again leads to the same verification screen and the same refusal.

The reopened ballot starts empty, so the voter answers every question again. When they cast it, it replaces their earlier ballot and gets a new confirmation code. A ballot cast on paper cannot be changed online ("Your ballot was cast on paper and cannot be changed online."), and neither can an online ballot that was set aside in favor of the member's paper ballot. With the switch off, a voter who tries to vote again is told "You have already voted".

What voters see on the results page

The results page is the election's address followed by /results, for example `vote.direct/v/2026-board-of-directors-election/results`. Voters reach it from **View Live Results** or **View Results** on the election page, from **View Results** on the thank-you screen, or from a receipt. What they see depends on your results settings (see Close, results and the record):

Situation	What a voter sees
Show results during voting on, voting open	The live tally. It updates as ballots come in, with a notice "New vote received".
Show results after closing on, voting closed	The final results, open to anyone with the link.
Show results after closing only, voting open	"Results Not Available Yet", "Results for this vote will be available after voting closes." and "Check back after Oct 30, 2026", with a **Back to Vote** button.
Both off	"Results Not Available Yet" and "The vote creator has chosen to keep results private."

Situation	What a voter sees
Anonymous ballot below your minimum	A lock with "Results are protected until 5 votes are cast", "To protect voter anonymity, results are hidden until enough people have voted" and a count such as "3 of 5 votes received". The number comes from Minimum votes before results show.
Sealed ballot, before close	"Sealed ballot box". The tally stays closed to everyone, you included, until voting closes.
Waiting for an inspector's certification	No tally after close until your inspector of elections certifies the results. See Inspectors and state rules.

The results page shows a **LIVE RESULTS** or **FINAL RESULTS** tag, the number of ballots and how many were verified, the quorum when you set one, and a card for each question with a bar for each choice. Ranked questions add the counting rounds. On a weighted election, voters can switch between **Weighted** and **Raw Count**. Open-text questions show only how many written responses came in, never the text. After close, a **Tamper-Evident Results** box shows the results' SHA-256 fingerprint. Voters can print the page with **Save as PDF** or copy its address with **Share Results**. The page never shows who voted for what.

Languages

A ballot can be offered in English, Spanish, Simplified Chinese and Traditional Chinese. You choose the languages on the election page's **Languages** card. When an election offers more than one, a language menu sits at the top right of the election page and of the ballot. Each language is listed in its own words: English, Español, 中文（简体）, 中文（繁體）. The choice is remembered in that browser.

- The voter's choice changes your title, description, questions and answers, and the ballot's buttons and labels.
- A translated ballot carries a line, in the voter's language, saying it was translated automatically and that the version in the original language is the official one. In English it reads "This ballot was translated automatically. The English version is the official one."
- Answers count the same in every language: a Yes chosen in Spanish and a Yes chosen in English are the same choice.
- A voter who picked a language on another election that yours does not offer sees your ballot in its original language, with a line such as "This ballot is available in English only."
- Some lines stay in English: the code step ("Enter access code", "Resend Code"), "Read more" on candidate bios, "Votes remaining" and "Add write-in candidate", the TEST BALLOT banner, and some error messages. Invitations, code messages and receipts are sent in English.
- The language menu in the top bar of the verification screens also lists Français. Choosing it changes vote.direct's own buttons and labels; your ballot's text stays in its original language.

Accessibility

- Text sizes follow the browser's text size setting, so a voter who has made text larger in their browser gets a larger ballot. Pinch-to-zoom works on phones. There is no text-size control on the page itself.

- Buttons are at least 44 pixels tall, and the fields on the verification screen use text large enough that iPhones do not zoom in when the voter taps them.
- The ballot can be used with a keyboard: Tab moves between controls, Enter moves to the next question, and the arrow keys move between the code boxes. Ranked questions are ordered with buttons, not by dragging.
- Screen readers announce the code boxes as "Digit 1 of 6", read instructions for the ranking buttons, and start at the ballot's title after verification.
- Status tags pair color with an icon and a word, so nothing depends on color alone. The default colors are high-contrast; if you change the ballot's colors, check that the text stays easy to read.
- For a voter whose device asks for reduced motion, moving between questions does not scroll with animation.
- Documents open in a viewer inside the page. Some phones cannot show a PDF there, so **Open in new tab** is always offered.

Test ballots

A test ballot (see Test, then publish) is a hidden copy of your election, sent to you by email or text the way a voter's invitation is, through the same screens. The invitation looks exactly like a voter's, with no test marking. The election page, the ballot and the thank-you screen carry an amber banner with a black border: "TEST BALLOT · This is exactly what your voters receive. Nothing you do here is counted in the real election." It cannot be dismissed. The verification screens do not show it.

vote.direct/verify checks records, not codes

Voters who want to check an election sometimes find `vote.direct/verify`. That page checks an election's audit package, a .json file of the election's record, by recomputing it in the browser (see Close, results and the record). It does not look up a voter's confirmation code, and confirmation codes are left out of the audit packages you share. A voter's proof is the code and certificate from their thank-you screen.

Questions voters ask

"I never got the invitation."	Ask them to check spam or junk mail and to search for your organization's name, since the email is sent under it. You can resend from the Voters tab. On an election limited to your voter list, the voter can also open the election's address and type the email you hold for them: a code is sent if that address is on the list.
"My code doesn't work."	Codes work for 30 minutes and allow three tries. Ask them to use the newest code email or text, or press Resend Code. If they pressed send twice while the first code was still good, both messages carry the same code.
"It says I'm not on the list."	The address or number must match the one on your voter list for this election. Check the spelling on the Voters tab, or ask which address they used and suggest the one you hold.
"It says this email/phone has already voted."	A ballot has been cast with that address or number, and the Voters tab shows it. Whether they can change it depends on Allow vote changes.

"Did my vote count?"	If they saw Vote Cast! and a confirmation code, the ballot was recorded. The code is their proof. A receipt email or text, when one is sent, repeats it.
"I closed the page and lost my code."	If a receipt was sent, the code is in it, except on a Sealed ballot election. Otherwise there is no way for a voter to look it up later, and the certificate download is only on the thank-you screen. The Voters tab still shows that they voted.
"Can I see how I voted?"	No. After the ballot is cast, vote.direct does not show a voter their answers: not on the thank-you screen, not in the receipt and not on the certificate.
"Can I change my vote?"	Only if you turned on Allow vote changes before voting opened, and then only from the browser they voted in or with their printed code or Voter ID. See Can a voter change a ballot?
"Why does it ask me to confirm my email again?"	They opened the ballot in a different browser or device from the one where they entered the code, or their browser blocks cookies. They press CONFIRM MY EMAIL and enter a new code in the browser they want to use.
"Is my vote secret?"	It depends on your Ballot secrecy setting, and voters can see which kind it is on the Ballot tile before voting opens and on the identity check page. On an Identified ballot, organizers can see who voted and how. On an Anonymous ballot, the voter's identity is withheld from organizers, results and exports. On a Sealed ballot, the ballot is stored with no link to the voter at all.
"I don't use email."	Voters can be set up for text on your roster, or given a printed notice, a Voter ID slip or a paper ballot. See Paper, mail and in-person ballots.
"The page says voting has not opened."	Voting opens at the time shown. A page left open turns into the live election page on its own once that time passes.
"It says online voting has closed, but the meeting hasn't happened yet."	You set online voting to close early. They can vote in person or on paper, as your election notice describes.
"I own two homes. Do I vote twice?"	It depends on Owners of more than one unit: one ballot that counts for both, a ballot for each home in one sitting, or a separate email for each home.
"Can I vote for my spouse?"	Each person on your voter list gets their own link. If your election gives one ballot per unit, co-owners share one ballot and the first to vote casts it.

CHAPTER 10

While voting is open

Once an election is published, you run it from its election page. This chapter shows where to watch turnout, how to close voting early, what you can still change, and how to duplicate, cancel or delete an election.

IN THIS CHAPTER

- Your elections on Home
- The election page
- Who can act on an election
- The Overview tab
- Closing voting early
- Watching turnout on the Voters tab
- The Settings tab while voting is open
- Duplicate, template, cancel and delete

Your elections on Home

Press **Home** in the top bar to open `vote.direct/dashboard`. The **Votes** tab lists every election in your workspace, one card per election. Above the cards, a row of filters narrows the list: **All**, **Live**, **Scheduled**, **Drafts** and **Closed**. A number beside a filter shows how many elections it holds.

The list is sorted by what needs you first. Live elections come first, the one closing soonest at the top. Scheduled elections follow, the one opening soonest first. Then drafts, most recently changed first, and finally closed elections, most recently closed first.

Each card has a colored stripe on its left edge (red for live, amber for scheduled, gray for drafts and closed elections), a status badge, the election title, a one-line status, and a next step on the right. The whole card is one link: click anywhere on it to open the election page at the place where that next step is done.



FIGURE 10.1 Two election cards on Home in the middle of the board election. The status line says where each election stands, and the label on the right says what clicking the card opens.

What each status line means:

Status	Status line (example)	Next step	Where the card takes you
Draft	1 question · 212 voters	**Finish and publish**, or **Add questions** if the ballot has none	The election page
Draft, no voters	1 question · no voters yet	**Add voters** (amber)	The Voters tab with Add voters open
Scheduled	Opens Oct 19 · 212 voters	**Manage**	The election page
Live	131 of 212 voted · closes Oct 30, or "no end date" if you did not set one	**Manage**	The election page
Scheduled or live, no voters	Live · no voters yet · closes Oct 30	**Add voters** (amber)	The Voters tab with Add voters open
Closed	Closed Oct 30 · 171 ballots	**Results**	The Results tab

The date on a scheduled card is the opening date from your schedule. The date on live and closed cards is the closing date from your schedule.

The election page

Click a card to open its election page. The browser tab shows the election's title, so you can tell several open elections apart. The page has the same frame on every visit: a header, any banners that apply, four statistic tiles, and four tabs.

The header

- **Back to Dashboard** returns you to Home.
- A status badge: **DRAFT**, **SCHEDULED**, **LIVE** or **CLOSED**. These four are the only statuses an election has.
- A verification badge that names how voters prove who they are, for example **Email Verified** or **Phone Verified**.
- The election title and description, then "by" and the sender name your voters see on emails, for example "by Longleaf Ridge Homeowners Association".
- On a live election, a pencil beside the sender name (**Edit sender name**) lets you change it. After you save, a message confirms "Sender name updated". While the election is a draft or scheduled, you change the sender name in the ballot editor instead.

The header has one button on the right, and its label follows the status. On a draft it reads **Preview ballot**. On a scheduled or live election it reads **Open ballot**. On a closed election it reads **Open results**. Each opens the page your voters see, in a new browser tab. Each voter has a personal ballot link, so use this button to look, not to hand out the ballot.

Banners above the tabs

Most of the time there are none. These appear only when they apply:

- **Support access.** If our support team has been given access to the election, an amber banner reads "vote.direct support has access to this election" and describes the access. Press **Revoke access** to end it at any time.
- **No voters.** If the voter list is empty, an amber notice says so, with an **Add voters** button.
- **Failed submissions.** If voters' attempts to submit a ballot failed in the last 24 hours, an amber notice counts them, for example "2 submission attempts failed in the last 24 hours", and shows the last error and when it happened.

The four tiles

Once an election is published, four tiles sit above the tabs. On a live election, a red **LIVE** marker and the words "Stats update in real time" sit above them. If the page loses its live connection for a moment, the marker reads **Reconnecting...** until it is back.

Total Votes	Ballots counted so far. A ballot set aside under your election's rules is not counted.
Verified Votes	Ballots from voters who completed verification.
Turnout	People on your voter list who have voted, divided by the number of people on the list. It is the same percentage the Voters tab shows.
Question or Questions	How many questions the ballot has.

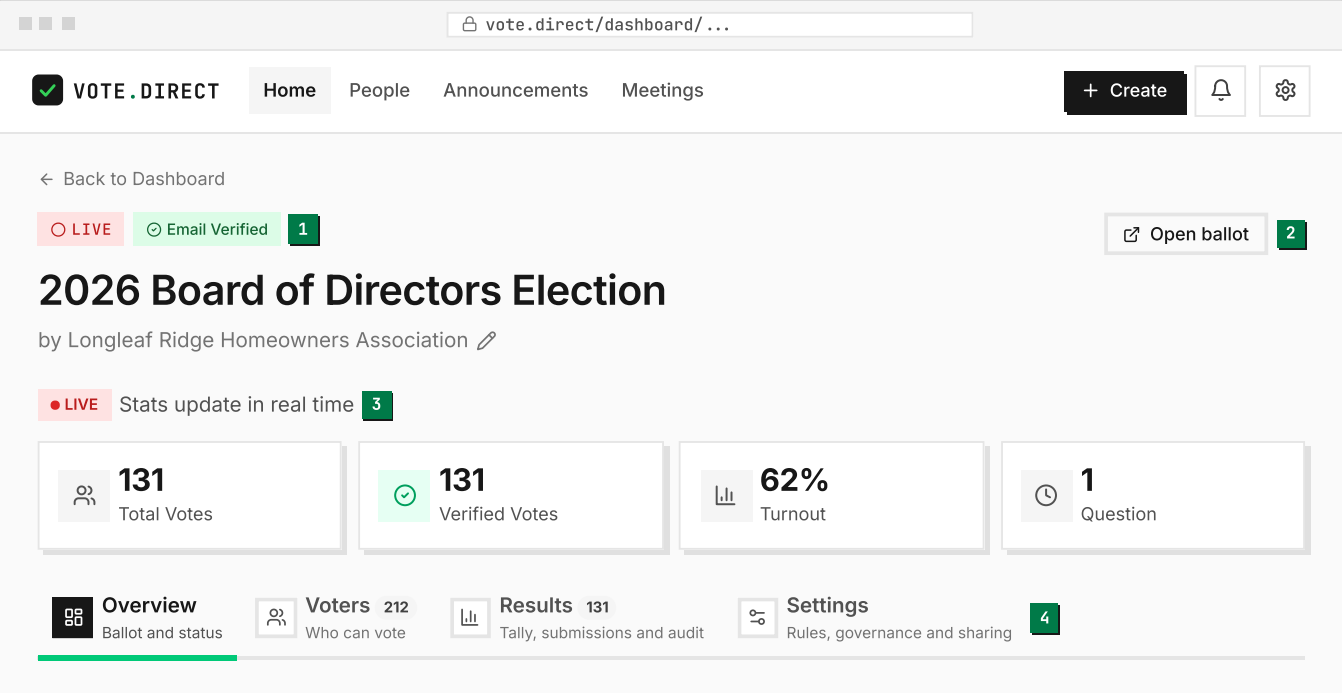
Large numbers are shortened on the tiles, so 1,200 shows as 1.2K.

The four tabs

The tabs are **Overview** ("Ballot and status"), **Voters** ("Who can vote"), **Results** ("Tally, submissions and audit") and **Settings** ("Rules, governance and sharing"). The Voters tab carries a count of the people on your voter list, and the Results tab a count of ballots cast.

- The **Results** tab is hidden while the election is a draft, because there is nothing to count yet.
- The **Voters** tab appears for every election with a voter list. Every election you build in the wizard has one.

The first time you open an election, the page starts on **Overview**, unless the link you followed points to another tab: the **Results** link on a closed election's card opens the Results tab. If you leave the election and come back without reloading the page, it returns to the tab you were on.



1. The status badge and the verification badge.
2. The one header button. It opens the ballot page in a new tab.
3. The live marker, shown only while voting is open, above the four tiles.
4. The four tabs, with counts of voters and ballots.

FIGURE 10.2 The top of the election page on a live election, with 131 of 212 voters done.

Who can act on an election

Everyone in your workspace can open an election from Home and read its pages and its voter list. The person who created the election can do everything on it, whatever their role. The workspace's owners and admins can also:

- close the election early;
- cancel or delete it;
- see the tally at any time (editors and viewers see it when voters can, or sooner when the election shares its results with everyone on the team);
- export results and download the certificate and the audit package;
- see the Submissions table and the Audit Log;
- appoint or remove an inspector of elections;
- run paper and mailed ballots, and download printable notices and voting codes.

Editors can change any election's ballot, settings, schedule and voters, publish it, and send its ballots and reminders. Anyone in the workspace can duplicate an election. Each person sees only the buttons their role allows. A few things stay with the person who created the election: its own web address, its roster request link, asking for a free election, seeing and revoking vote.direct support access, and paying for it by card. For roles in a workspace, see Team and roles.

The Overview tab

Overview shows where the election stands, what is left to do, and the ballot itself. What it holds depends on the status.

While the election is scheduled

An amber card shows the **SCHEDULED** badge, "Voting scheduled", and "Voting opens in:" with a countdown in days, hours, minutes and seconds. vote.direct opens the election by itself at the opening time. There is no close or cancel button on a scheduled election. To move the opening or closing time, use the Settings tab.

Until voting opens, the **Ballot** card still offers **Edit** and **Design**, and every settings group can be changed. If paper ballots have already been printed, the ballot is locked: the card says "Paper ballots have been generated, so the ballot is locked" and points you to the Paper ballots screen, where voiding them unlocks it. For editing, see Build the election.

While the election is live

The top card has a pink tint. It shows the **LIVE** badge, "Voting is active", and a **Close Early** button on the right. Below that:

- With a closing time, "Voting closes in:" and a countdown. When the countdown reaches zero, it reads "Voting has ended", and vote.direct closes the election at its next check (see Close, results and the record).
- Without a closing time, "No end date. Voting stays open until you close it here."

Below the status card is the **Next steps** card, the published election's to-do list. It is built from the same voter list as the Voters tab. Its header counts required steps, for example "4 of 5 done". When every required step is done it reads "Every ballot is out: now it is up to the voters." The next step to do has an amber outline and a **NEXT** tag. Optional steps carry an **OPTIONAL** tag. Click a row to go where its step is done.

Row	Shown when	Not done yet	Done
Email ballots	Anyone votes by email, unless you hand out ballots yourself (printed notices, links or sign-in sheets)	"Email the ballot to 3 voters", with a black **Send to 3 unsent** button (or **Send the ballot** for one voter). Nobody is emailed automatically.	"Ballot emailed to 198 voters"
Text ballots	Anyone votes by text	"Text the ballot to 2 voters". You send texts from the Voters tab.	"Ballot texted to 9 voters"
Test ballot (optional)	Always	"Send yourself a test ballot". Opens the test ballot panel. See Test, then publish.	"Test ballot sent to you"
Paper ballots	Anyone votes on paper	Choose how paper is handled, print the ballots, then "Enter 3 paper ballots". A paper ballot is not in the results until you enter it.	"All 5 paper ballots recorded"
Counting	Anyone votes on paper	"Assign who counts the paper ballots"	"Counter assigned for paper ballots"

Row	Shown when	Not done yet	Done
Voter details (optional)	Someone's voting method is missing an email, mobile number or mailing address	"Finish details for 2 voters"	The row goes away
Closing (optional)	Always	"No end date: close the vote yourself when voting is done", with **Set an end date**	"Closes Oct 30, 7:00 PM"

For the paper rows, see Paper, mail and in-person ballots.

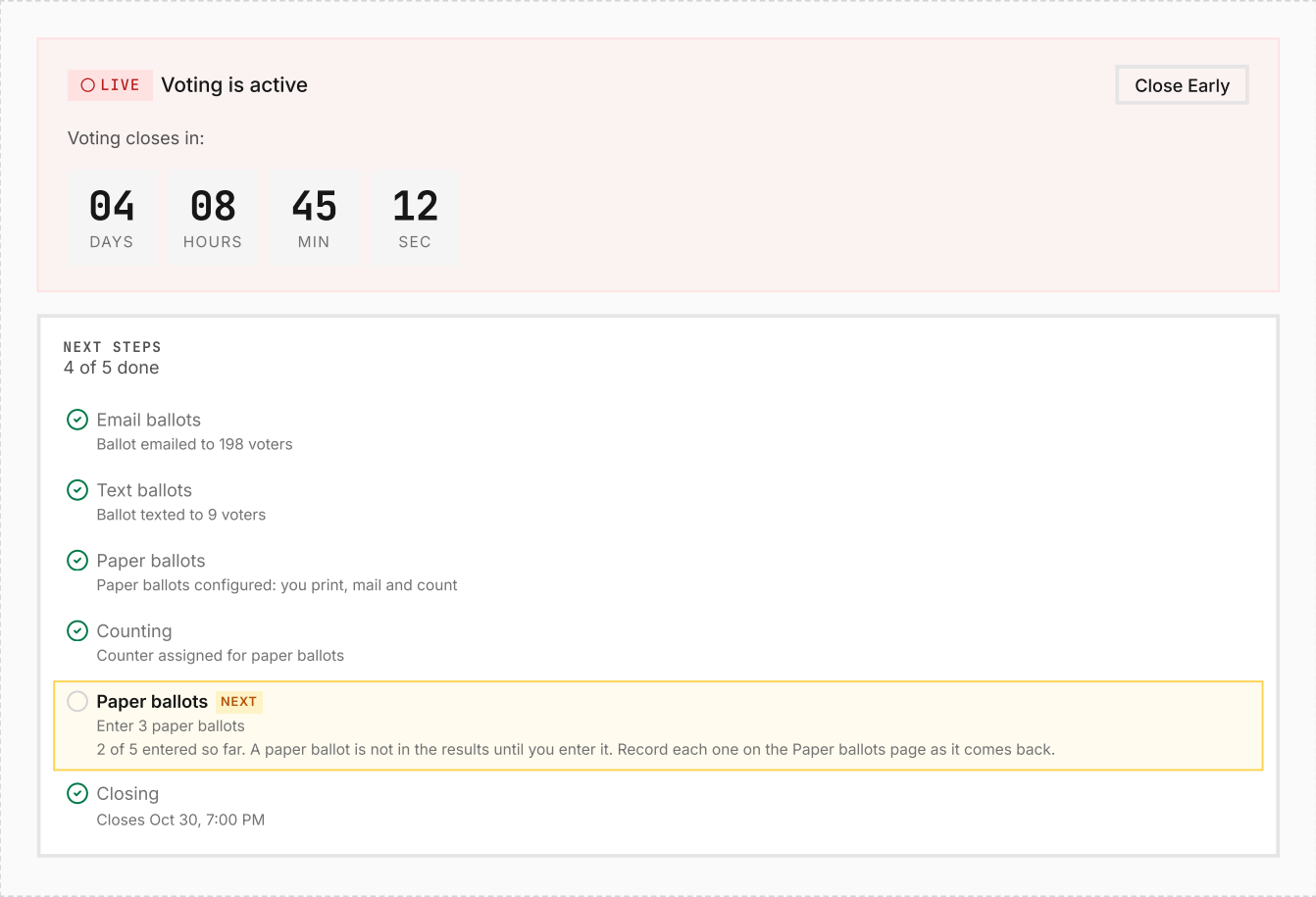


FIGURE 10.3 The Overview tab of a live election: the status card with its countdown, and the Next steps card. Here every email and text ballot is out, and three mailed paper ballots still need entering.

Further down Overview:

- A card titled "Was this a test run?" appears on a published election whose title sounds like a rehearsal (for example "test" or "practice") or whose voter list has 1 to 10 people. Press **Yes, the real one is coming** to note when the real election opens and about how many voters it will have, or **No, this was the real vote** to dismiss the question for good. Once saved, **Start it from this ballot** copies the ballot into a new draft.
- The **Ballot** card shows the ballot as your voters see it: "What voters see: the description, any photos or documents, and every question. Try the controls; nothing here is recorded." On a live or closed election it has no Edit or Design button.

- The **Languages** card lists the languages the ballot is offered in.

After the election closes

The status card goes away, and so does the Next steps card. Overview keeps the read-only Ballot and Languages cards. The tally, downloads and record live on the Results tab, described in Close, results and the record.

Closing voting early

An election with a closing time closes by itself at that time. You only need to close by hand if the election has no end date, or if your board decides to end voting before the scheduled time. You can close only a live election, and only from the status card on the Overview tab. The person who created the election, and the workspace's owners and admins, can close it.

1. Open the election and stay on the **Overview** tab. Press **Close Early** on the status card.
2. Read the dialog. Its title is "Close voting early?" and it says: "Voting ends immediately and results are finalized. Voters who have not submitted yet will no longer be able to. This cannot be undone."
3. If paper ballots have not all been counted, the dialog adds a line that starts "PAPER BALLOTS:" and gives the number. Stop here and press **Cancel**: a closed election can no longer accept a paper count, so enter every paper ballot on the Paper ballots screen first.
4. Press **Close voting**.
5. If your election has a quorum and it has not been reached, a second dialog appears: "Quorum has not been reached. You can still close the vote, but the results will be advisory only rather than binding." Press **Close anyway** to close, or **Cancel** to keep voting open.
6. A message confirms "Voting closed". If you closed without quorum, it adds "Results are advisory (quorum not met)."

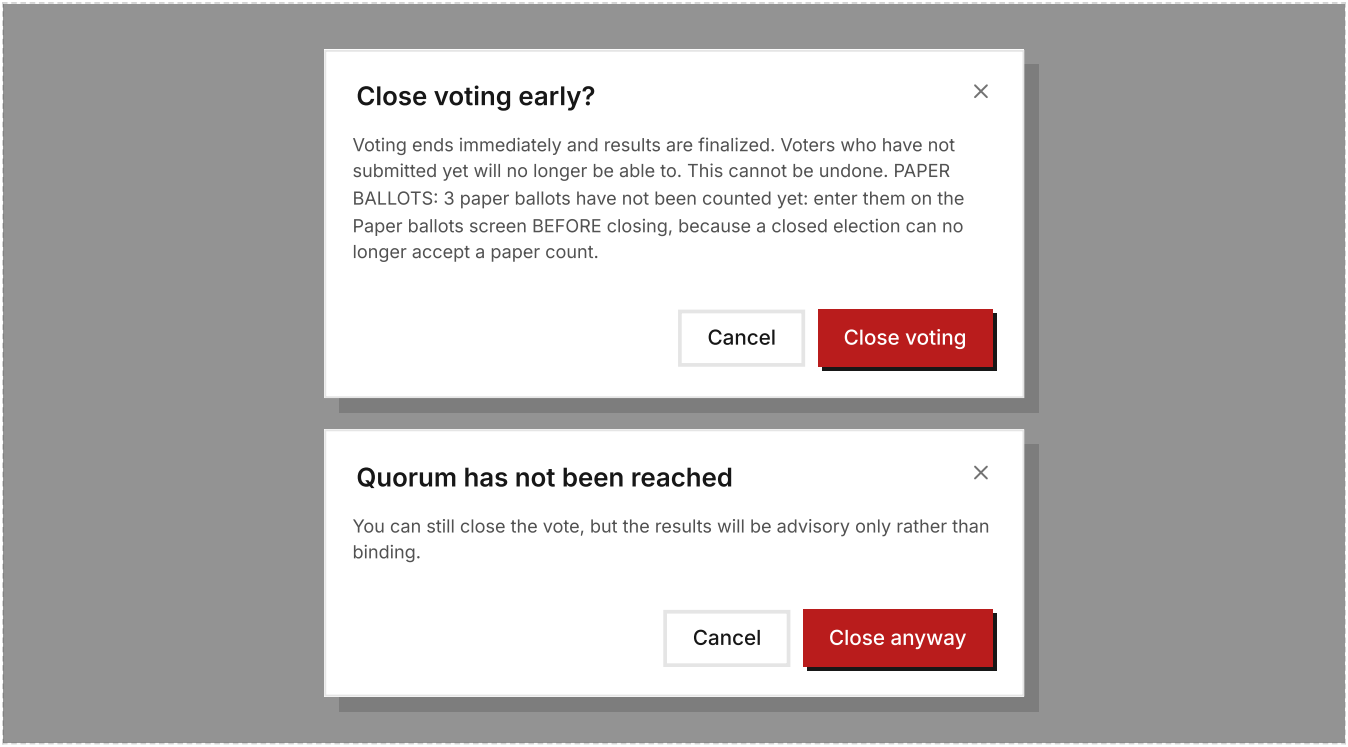


FIGURE 10.4 The two dialogs of Close Early. The paper line appears only while paper ballots are still out, and the second dialog only when a quorum is set and has not been reached.

> BEFORE YOU CLOSE
>
> Closing cannot be undone. A closed election cannot be reopened, and its settings can no longer be changed. If your board only wants more time, move the closing time instead (see the Settings tab while voting is open).

What closing does, and what you and your inspector receive, is described in Close, results and the record.

Watching turnout on the Voters tab

The Voters tab is where you see who has voted and who has not. This section covers what to read there while voting is open. For importing and editing your voter list, see Voters and your roster. For sending ballots and reminders, see Invitations and reminders.

The Voter List header

The **Voter List** card has buttons in its header, each shown only when it can do something:

- **Send to 3 unsent**: emails the ballot to voters who have never been sent it.
- **Remind 74 who haven't voted**: emails a reminder to voters who were sent the ballot and have not voted.
- **Add Voters**: adds people to the list.
- **Remove all**: removes everyone who has not voted.

Under the header, one summary line adds up the list. Each part appears only when it is not zero:

212 voters	Everyone on the list.
3 not sent	Email voters who have never been sent the ballot.
2 not texted	Text voters who have never been texted the ballot.
78 invited, waiting	Sent the ballot, not voted yet.
1 did not arrive	The mail provider reported the ballot email as bounced, blocked or marked as spam. These voters are also counted in "invited, waiting".
131 voted	Ballots received, including paper ballots you have entered.
62% turnout	Voted divided by everyone on the list.
2 need details	Voters whose voting method is missing a detail. Click it to show only those voters.

Below the summary, a search box ("Search name, email or unit") and filter buttons narrow the list, for example **All (212)**, **Email link (198)**, **Text message (9)** and **Paper by mail (5)**. The table lists each voter, how they vote, their status, when the ballot was sent and when they voted. The Sent and Voted times are shown in UTC (Coordinated Universal Time), not your local time.

Status words

Hold the pointer over a status to read a one-line explanation.

Status	What it means
Voted	Ballot received.
Invited · hasn't voted	They were sent the ballot and have not voted yet.
Not sent	An email voter who has not been sent the ballot. Adding someone to a live election does not email them.
Not texted	A text voter who has not been texted the ballot.
Not voted yet	You deliver this ballot yourself (printed notices, a links file or voter IDs), so the status shows only whether they voted.
Ballot bounced	Their mail server rejected the ballot. Fix the address and send again, or switch them to a paper ballot.
Ballot blocked	Their mail server refused the ballot. Ask them to allow mail from us, use a different address, or switch them to paper.
Marked as spam	They reported the ballot as spam, so they are not emailed again for this election. Reach them another way.
Delivery delayed	The mail service is retrying. This usually clears on its own. If the reason is a full mailbox, the explanation says so.

Status	What it means
Voted (paper)	Their paper ballot was received and counted.
Paper ballot	This voter votes on paper by mail; nothing is emailed or texted to them.
Votes at the meeting	They mark a paper ballot at the meeting, and staff enter it.
Has a voting code	They vote online with a printed code you hand them.

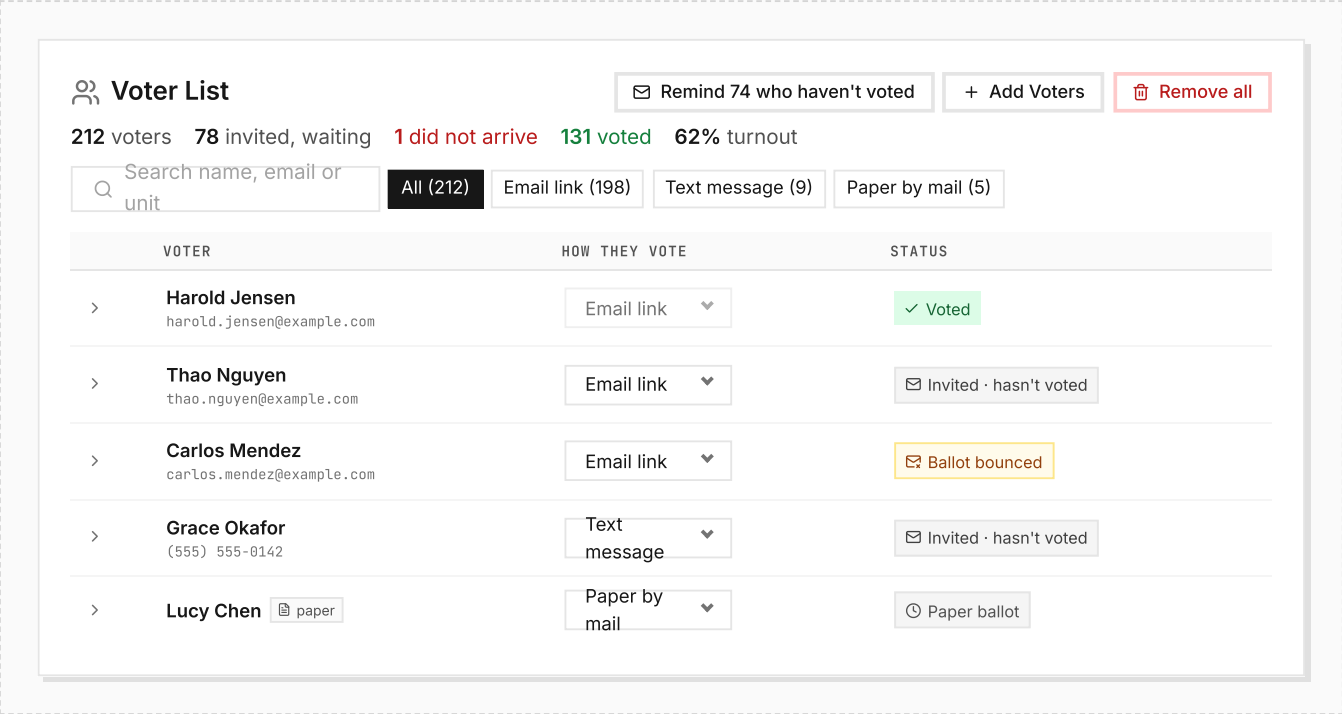


FIGURE 10.5 The Voter List mid-election, with the Sent, Voted and Actions columns left out. The summary line counts the whole list, and each row's status says what, if anything, that voter needs.

Reminding voters who have not voted

Press **Remind 74 who haven't voted**. A dialog asks "Send a reminder to 73 voters?" and explains: "Only people who were sent the ballot and have not voted are emailed. Anyone who got a reminder in the last 12 hours is skipped." The number in the dialog can be smaller than the button's, because addresses that bounced are left out. In an election with a unit field the dialog asks "Send a reminder to the owners who still have a unit to vote?" instead, and owners whose every unit has been voted are skipped. Press **Send reminders**. A message confirms "Reminders sent" with the number queued, and names anyone skipped. If nobody can be reminded, you see "No one to remind" instead. Automatic reminders have their own card on this tab; see Invitations and reminders.

Removing a voter

Hold the pointer over a voter's row and press the trash icon at the end of it. The dialog asks "Remove Thao Nguyen from the roster?" and explains: "Their ballot link stops working and they are no longer counted toward turnout. They stay in your contacts." Press **Remove**.

- A voter who has already voted cannot be removed, and neither can anyone once the election is closed.
- **Remove all** removes everyone who has not voted. Voters who have voted stay, and so does anyone with a paper ballot already generated, until it is voided. You must type `DELETE` in the dialog to confirm.

Adding voters to a live election

Press **Add Voters** and add people as described in Voters and your roster. Adding someone does not email them. When your election sends ballots by email, vote.direct asks right away: "Send the ballot to the 2 new voters now?" with the explanation "Adding people to the roster does not email them. Send now so they can vote, or do it later with “Send to unsent” in the voter list."

- Press **Send now** to email their ballots.
- Press **Later** to wait. A message confirms "2 voters added, not sent yet": they show as "Not sent" in the voter list until you send the ballot.

If you deliver ballots yourself (printed notices, a links file or voter IDs), there is no question. A message reminds you to download notices, links or credentials for the new voters.

The Settings tab while voting is open

The Settings tab opens with the **Settings** card. Each group of settings reads as one short sentence. Anything you changed from the usual setting is in bold. Press **Show every setting** to see every individual setting.

Once voting opens, the rules lock, so ballots already cast are never judged by different rules. An amber notice at the top of the card explains this: "Locked while voting is open. Ballots have been cast under these rules, so they can’t change mid-vote. You can still send or resend invitations and add voters on the Voters tab, edit the sender name under the title, change the close date below, and close voting early from the status card on Overview."

Group	While live
Who can vote	Locked. Shown with a padlock.
Results	Locked. Who sees results, and when, stays as it was set.
Voting rules	Locked: quorum, option order, proxy voting and ballot delivery.
Ballot options	Locked: ballot secrecy, vote changes, required questions, information collected and electronic signature.
Schedule	The closing time and the online voting cutoff can change. Press **Change**.
Reminders	Can change. **Change** takes you to the Reminders card on the Voters tab.

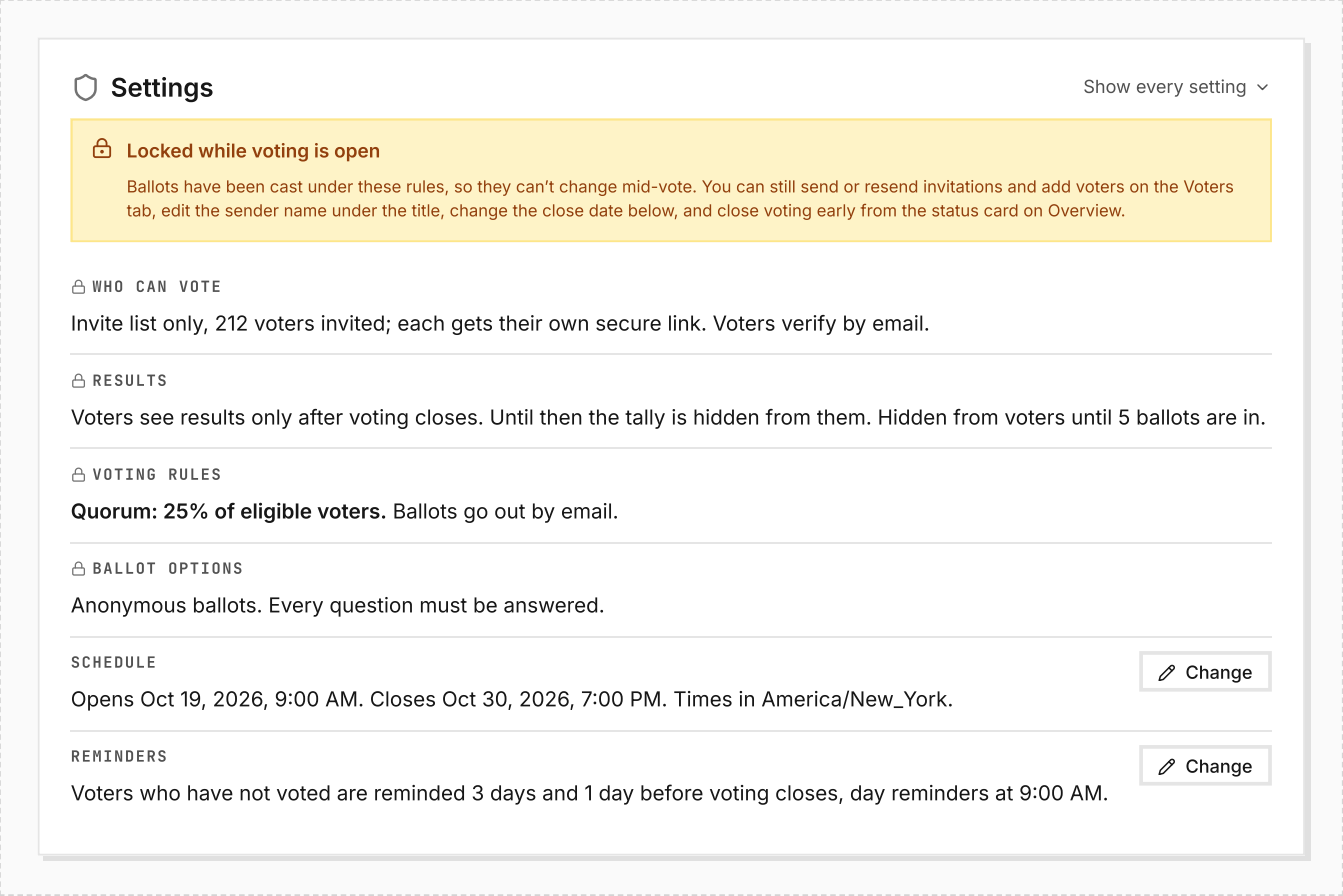


FIGURE 10.6 The Settings card on a live election. Four groups carry a padlock; only Schedule and Reminders offer Change.

Changing the closing time

1. Open the **Settings** tab and press **Change** beside **Schedule**. The group opens for editing with a green outline.
2. **Opens** is grayed out with the note "Voting has already opened." Set the new time in **Closes**. Times are in the election's own time zone, which is named in the group.
3. To stop only the web ballot earlier, for example when the meeting is called to order, set **Online voting closes**. Leave it empty to close online voting with the election. Paper and in-person ballots can still be entered until the election closes.
4. Press **Save**. A message confirms "Changes saved". Press **Cancel** to leave the schedule as it was.

> GOOD TO KNOW
>
> Pick a closing time in the future. vote.direct closes any live election whose closing time has passed, so a time you set in the past ends voting at the next check.

Below the Settings card, the Settings tab holds the **Inspector of elections** card and, when your election has a state, the **Compliance** card (both covered in Inspectors and state rules), then the **Vote address** card, with your preview link and a reminder that voters get their own secure links, and the **This election** card.

Once the election closes, the notice reads "This vote is closed. Settings are kept for the record and can no longer be changed."

Duplicate, template, cancel and delete

The rare actions sit at the bottom of the Settings tab in a card titled **This election**. Each is a sentence with one button. Which rows you see depends on the status:

Button	Draft	Scheduled	Live	Closed
Duplicate	Yes	Yes	Yes	Yes
Save as template	No	No	Yes	Yes
Cancel election	No	No	Yes	No
Cancel and refund	Only a draft that was paid for and never published	No	No	No
Delete	Yes	Yes	No	Yes

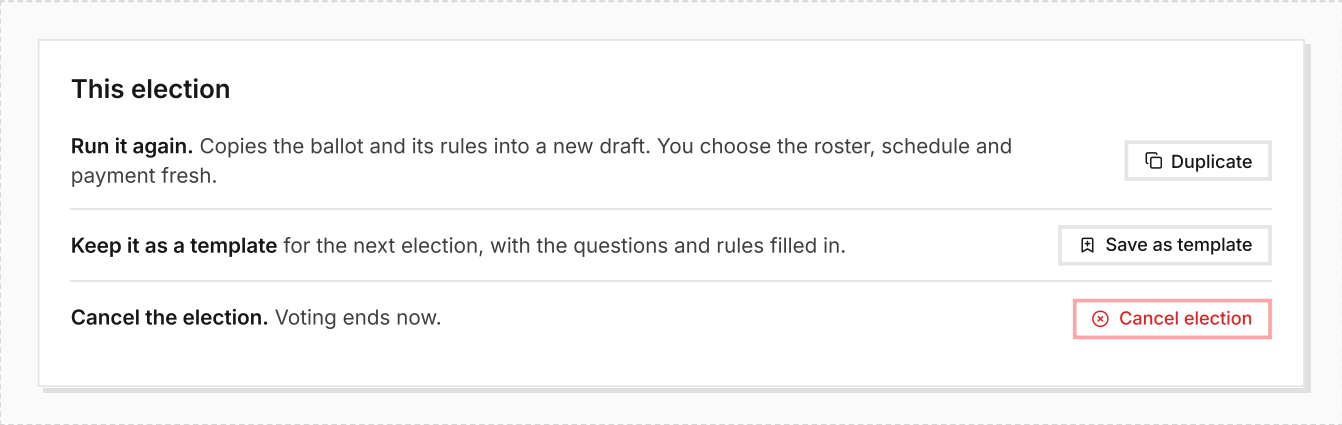


FIGURE 10.7 The This election card on a live election. Delete does not appear until the election is closed. The cancel sentence is shortened here; the text below describes how refunds work.

Duplicate

Press **Duplicate** to start a new draft in the wizard with this election's ballot and rules filled in. The voter list, the schedule and payment are not copied: you choose them fresh. Use it to run the same election next year, or to turn a test into the real election.

Save as template

Press **Save as template**. The dialog "Save as Template" explains: "Save this vote's configuration as a reusable template. Questions, verification level, quorum settings, and visibility will be saved. Voter data is never included." Type a name in **Template Name** (the example reads "e.g., Annual Board Election") and press

Save Template. A message confirms "Template saved". You pick your templates when you create a new election.

Cancel election

Cancel election appears only on a live election, and only the person who created the election, or an owner or admin of the workspace, can use it. Press it and a dialog titled with the election's name tells you how much of the fee goes back and where, then asks you to confirm. Press **Keep election** to back out, or **Cancel election** to go ahead. What happens next depends on whether anyone has voted:

- **No ballots cast.** Voting ends and the election closes. If the election was paid for, each payment goes back the way it was made: what was paid by card goes back to that card, and what was paid from an account balance, such as the difference paid when the list grew into a bigger band, goes back to that balance. The refund goes to whoever paid, even when an owner or admin cancels an election someone else paid for. A message confirms "Election cancelled" and says how much was refunded and where. A free election has nothing to refund.
- **Ballots cast.** The election cannot be cancelled automatically, and nothing changes. You see "Cannot cancel automatically" with the message "This election has received votes and cannot be cancelled automatically. Please contact support@vote.direct to request a cancellation and refund."

There is no separate "cancelled" status. A cancelled election shows **CLOSED**, and its audit log records "Election Cancelled". For refunds and your balance, see Billing and payments.

Cancel and refund

A draft that was paid for at checkout but never published shows **Cancel and refund**: "Cancel and get the fee back. This draft was paid for but never published." It then says where this draft's fee goes: "The fee goes back to the card it was paid with, and the draft stays saved" when it was paid by card, or "The fee goes back to the account balance it was paid from, and the draft stays saved" when it was paid from a balance. The dialog opens with "This draft was paid for but never published, so nobody has voted," names how much goes back and where, and adds: "The draft, its ballot and its voter list stay saved, and publishing it later charges the fee again." Press **Cancel and refund** in the dialog to go ahead, or **Keep election** to back out. If the refund cannot be processed, the draft keeps counting as paid and you are told to try again; trying again returns only what has not gone back yet.

Delete

Delete is for drafts, scheduled elections and closed elections. A live election cannot be deleted: close it first. Press **Delete**. The dialog "Delete this vote?" explains: "It disappears from your dashboard and its links stop working for voters. The official record (ballots, results, certificate and audit log) is retained for election-record retention and can be restored on request." Press **Delete vote**. A message confirms "Vote deleted", and you return to Home. To restore a deleted election, contact support (see Getting help).

CHAPTER 11

Close, results and the record

This chapter explains how an election closes, how to read the Results tab, and what goes into the files you keep: the exports, the certificate of results, the submissions list and the audit log.

IN THIS CHAPTER

- How an election closes
- What happens at close
- The Results tab
- Reading the results card
- Downloads
- The certificate of results
- Submissions
- The audit log
- What your voters see
- Checking a record at vote.direct/verify

How an election closes

An election closes in one of three ways.

- **At its closing time.** vote.direct checks once a minute for live elections whose closing time has passed, and closes them. It does this whether or not quorum was reached. The results page and its rules treat the election as closed from the closing time itself, even before that check runs.
- **When you close it early.** On the Overview tab, press **Close Early** on the status card. If a quorum is set and has not been reached, you are asked to confirm, and the results are then advisory. See Closing voting early.
- **When you cancel it.** Cancelling a live election that has no ballots also closes it. See Duplicate, template, cancel and delete.

An election with no end date stays open until you close it. If you set an online voting cutoff, the web ballot stops at that time, but paper and in-person ballots can still be entered until the election closes.

What happens at close

- **Voting stops.** No new online ballot is accepted, and no paper ballot can be entered. Enter every paper ballot before the election closes.
- **The tally is saved.** vote.direct saves the results with a fingerprint called the integrity hash: a long code computed from the tally. The same code appears on your inspector's page and in the inspector's certification statement.
- **Sealed ballots open.** If the election uses sealed ballots, the ballot box is shuffled at this moment, and the tally becomes readable for the first time.
- **Your team is notified.** Members of your workspace see "Results ready: 2026 Board of Directors Election" in the notification bell (the bell icon in the top bar), with "Voting has closed and the final results are available." Anyone who turned that notification off does not see it.

- **Your inspector is notified.** If you appointed an inspector of elections, they receive an email headed "Ready for your certification", and voters see no results until the inspector certifies them. If the inspector never accepted the appointment, you receive an email headed "Action needed". See Inspectors and state rules.

vote.direct does not email the results to your voters. If you want them to have the results, share the results page or the certificate yourself.

The Results tab

The Results tab appears once an election is published, so you can watch the tally while voting is open and read the final result afterwards. From top to bottom it holds:

1. a banner that says whether your voters can see the results right now;
2. the results card, with the tally;
3. the **Export Results** card, with your downloads;
4. the **Submissions** table;
5. the **Audit Log**.

If you created the election, or you are an owner or admin of its workspace, you always see the tally on this tab, whatever your voters can see, along with the Export Results card, the Submissions table and the Audit Log. Editors and viewers see the tally only when voters can, and do not see those three. One exception applies to everyone: nobody, including you, can read a sealed-ballot election's tally until it closes.

The banner: who can see the results

The banner follows your setting for who sees results, and when (Settings tab, Results group), and the election's status. Its main forms:

Banner title	When	What it tells you
Voters can see the live tally	Live, results shown while voting is open	"Results update as ballots come in and anyone who can open the ballot can watch them."
Voters cannot see this while voting is open	Live, results shown after close	Voters get the results page after voting closes. Until then they cannot see the tally.
Voters can see these final results	Closed, results shown after close	"Voting is closed and the results page is open to anyone with the link."
Voters see a locked screen for now	Voters would see results now, but the election uses anonymous voting and has fewer ballots than your minimum (5 unless you changed it)	Voters see a locked screen until that many ballots are in. You always see the tally.
Voters cannot see this yet	Scheduled, before voting opens	When voters will see results.

Banner title	When	What it tells you
Voters cannot see this	Closed, when results were set to show only during voting	That voters no longer can see results.
Private: voters never see results	Results never shown to voters	"Voters never see a tally, before or after close. Share numbers yourself if you want them known."
Sealed ballot box: opens when voting closes	Sealed ballots, before close	No one, you included, can see the tally until voting closes. Turnout is on the Voters tab.

On the right of the banner, a button opens the results page in a new tab. It reads **Public results page** when voters can see results now, and **Results page (as you see it)** otherwise. A **Copy link** button appears when voters can see the results now or will see them after close. If you appointed an inspector, voters see no results after close until the inspector certifies them.

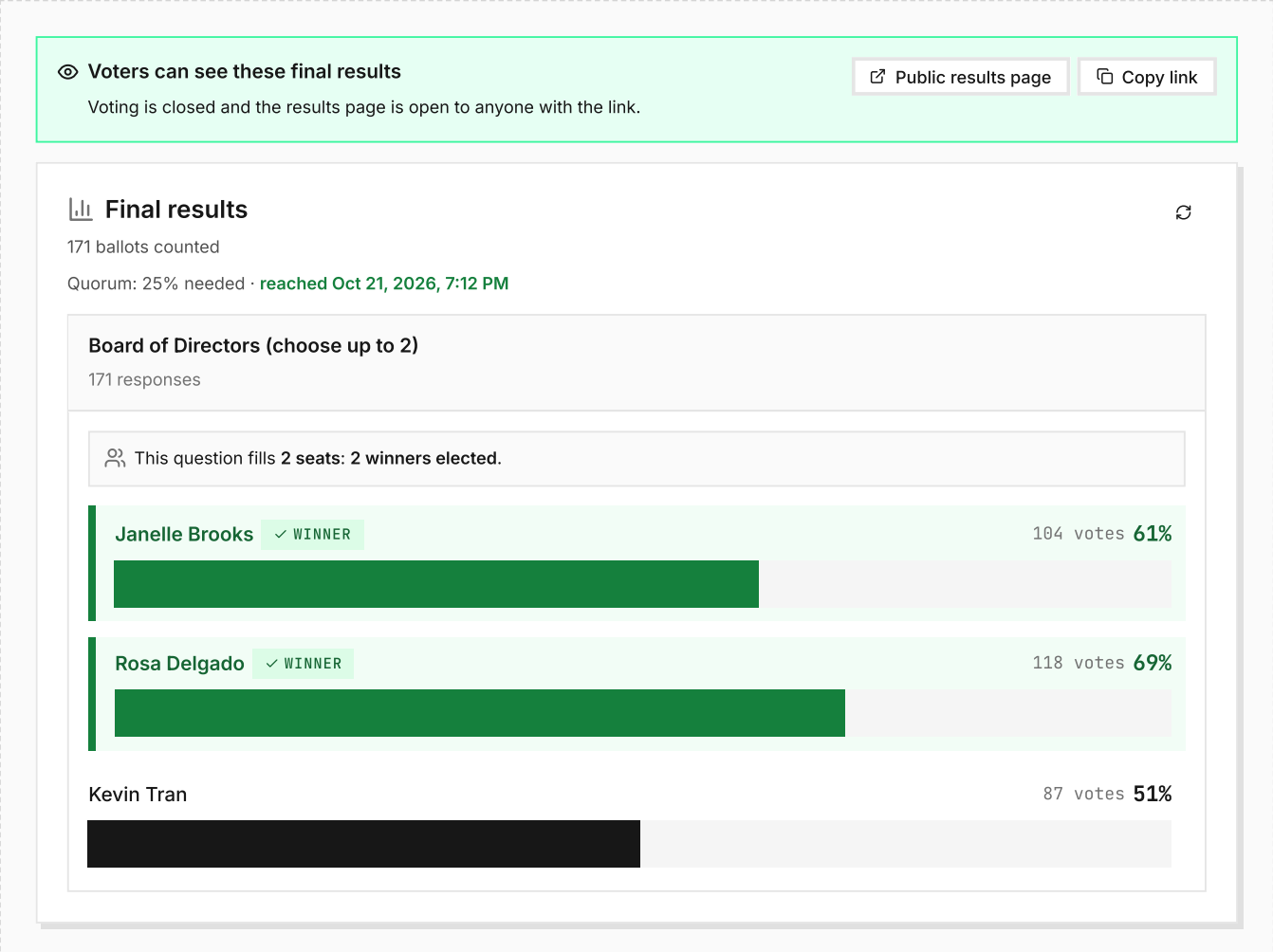


FIGURE 11.1 The Results tab after the board election closed and the inspector certified it. Percentages are shares of the 171 people who answered, so with two picks each they add up to more than 100%.

Reading the results card

The card's title is **Results so far** until the election closes, then **Final results**. Under the title, "171 ballots counted" gives the number of ballots. While voting is open it adds "updates as votes come in". On a closed election whose tally comes straight from the results saved at close (plain single-seat questions), it adds "certified final tally". That wording is about the saved tally. It does not mean an inspector has certified anything. The refresh button at the top right reloads the tally.

- **Quorum line.** If your election has a quorum and ballots are in, a line reads, for example, "Quorum: 25% needed · reached" with the date and time it was reached, or "not yet reached".
- **Weighted / Raw count.** On a weighted election, a switch shows the tally by voting weight or by number of ballots.
- **Questions.** Each question has its own block with its text and the number of responses. With several questions they are numbered Q1, Q2 and so on.

Times on this tab, in the quorum line and in the banner, are shown in UTC (Coordinated Universal Time), not your local time.

Bars and badges

Each option has a bar, its count ("104 votes", or "voting weight" on a weighted election) and its percentage. On most questions the percentage is the share of people who answered the question, so on a "choose up to 2" question the percentages add up to more than 100%. On cumulative and scored questions it is the share of all votes or points given.

WINNER	Green badge, green bar. Winners are named only after the election closes.
LEADING	Gray badge. While voting is open, the options currently in front show as leading, never as winners.
TIED	Gray badge, after close. Options tied for a winning place are marked tied, and none of them is marked as a winner.

- An option named "Abstain" is counted in the total but can never win.
- Write-in names are grouped (capital letters and extra spaces do not matter) and appear as their own rows. A write-in can win a single-choice, multiple-choice, cumulative or approval question.
- An option with no votes never wins, even if a seat would otherwise be empty.

Seats and ties

When a question fills more than one seat, a line above the bars says so: "This question fills 2 seats: 2 winners elected." While voting is open it reads instead "Voting is still open, so nobody is elected yet", with the number of candidates currently leading.

If candidates are tied for the last seat when voting closes, vote.direct does not pick a winner. The line turns amber and says how many seats are undecided: "1 seat is undecided because candidates are tied for it. The tie has to be resolved the way your governing documents say: a runoff, a coin toss, or whatever they specify. We

report the tie rather than picking a winner." Candidates above the tie keep their seats. On a single-seat question, a tie shows as TIED badges on the bars and, after close, the same amber line.

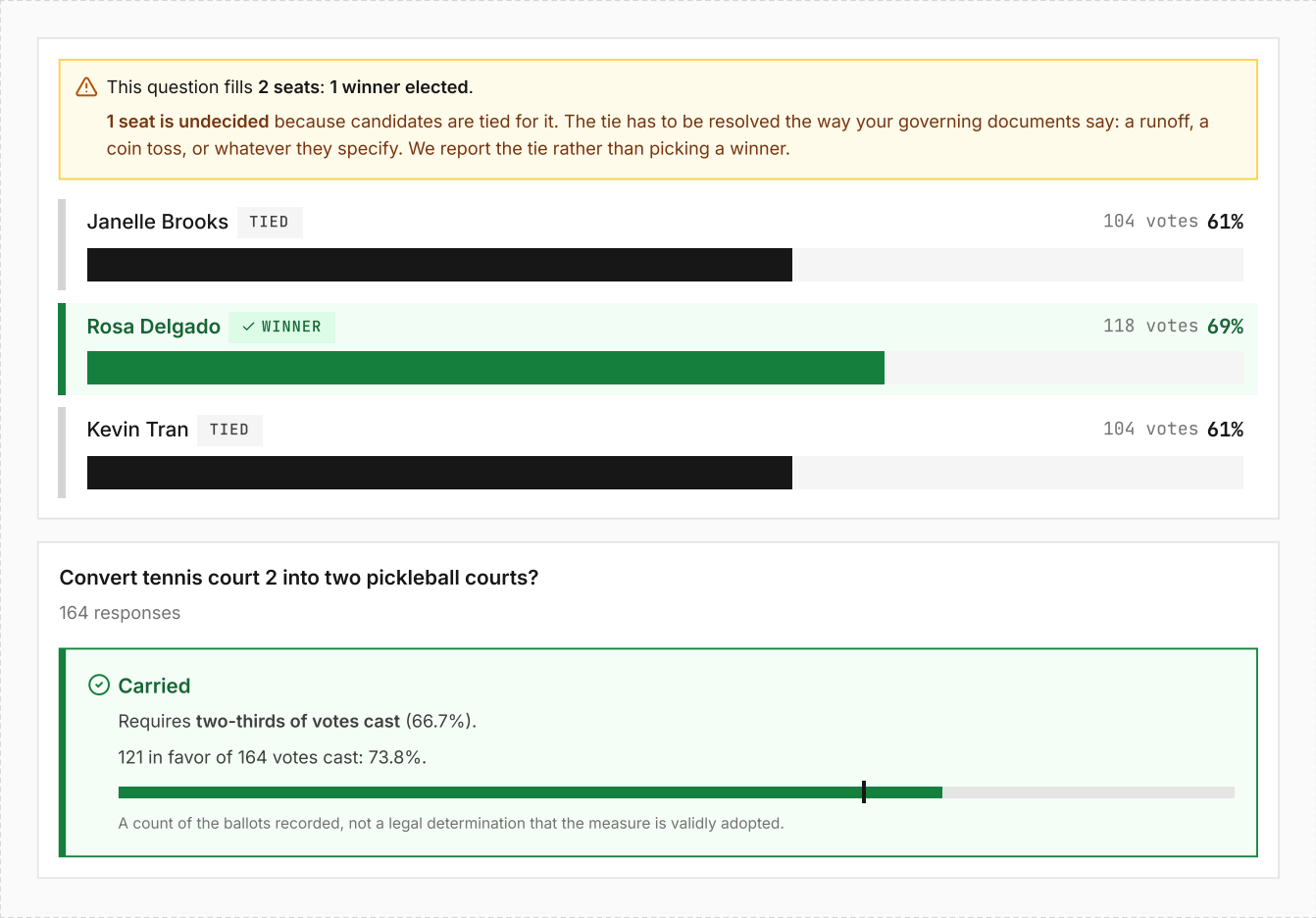


FIGURE 11.2 Two verdict boxes. Top: a made-up variation of the sample, as if Janelle Brooks and Kevin Tran had both finished at 104 votes for the second seat. Bottom: the pickleball question, as it would read if the board had required two-thirds of votes cast.

How each counting method is shown

On a ranked question, the bars show first choices: how many voters put each candidate first. The counting method decides who wins, so the winner is not always the longest bar. Below the bars, a block shows the working.

Counting method	Block below the bars	What it shows
Instant runoff (ranked choice)	Elimination rounds	Each round: the votes per candidate, "Majority needed", who was eliminated and who was elected, and ballots set aside with no remaining choice. If a candidate won a majority of first choices outright, there are no rounds to show.
Single transferable vote	Transfer stages	The quota, each stage (first preferences, a surplus transferred, a candidate excluded), and who was elected at which stage.

Counting method	Block below the bars	What it shows
Borda count	Borda point count	A table with columns Candidate, Points, 1st choices and Ranked by.
Condorcet	Head-to-head results	A grid where each cell counts the ballots preferring the row candidate over the column candidate, and a note naming the winner.
Scored voting	Score totals	A table with columns Candidate, Total points, Average and Scored by. The bars show total points; the highest total wins.
Contingent vote, and scored voting with the STAR runoff	None	Only the bars and the WINNER badge. The badge comes from the runoff, so it can go to a candidate whose bar is not the longest.

When a ranked count ends in a tie it cannot break, its block says the tie has to be resolved under your association's bylaws. When a tie arose during the count but every way of breaking it gives the same winner, the block says so.

Approval thresholds

A yes-or-no measure can carry an approval threshold, such as "Two-thirds of votes cast" (see Ballot questions and voting methods). The results card then shows a box under the bars with one of these headings:

Heading	When
Carried	Closed, and the measure reached its threshold.
Did not carry	Closed, and it fell short. A line says how many more votes in favor would have been needed.
Passing so far	Voting is open and the measure is above its threshold right now.
Not yet at the threshold	Voting is open and it is below its threshold. A line says how many more votes in favor are needed at the current turnout.
Not yet determined	No ballots have been counted on the question yet, or the threshold is measured against all eligible voters and that number is not on record.

The box also states the requirement, for example "Requires two-thirds of votes cast (66.7%).", and the count in favor. Abstentions do not count toward the votes cast. Every box ends with the same footnote: the result is a count of the ballots recorded, not a legal determination that the measure is validly adopted. Your association's attorney and governing documents decide that.

Rating and open-text questions

- **Rating.** The average in large type, a row of stars, "out of 5" (or your scale), and a bar for each rating showing how many people chose it.

- **Open text.** The number of written answers, for example "38 written responses: download the CSV export to read them". The answers themselves are in your CSV and PDF downloads, never on the results page voters see.

Empty and sealed states

- Before the first ballot: "No ballots yet. Results appear here as soon as the first vote is cast."
- A sealed-ballot election before it closes shows a padlock and, for example, "131 ballots in the sealed box. The tally opens when voting closes."

Downloads

Below the results card, the **Export Results** card offers your files. Each button opens or downloads the file in a new browser tab. The card is shown to the person who created the election and to the workspace's owners and admins, who can all download them.

Button	File	What is in it
CSV	A spreadsheet file	Summary rows (title, organization, ballots cast, eligible voters, participation, the scheduled opening and closing times, verification level, status, export date), then one row per option with Votes, Percentage and Winner (Yes, Tie or No). Weighted elections add weighted columns. Instant-runoff questions add a row per candidate for each round. Open-text questions add one row per written answer.
PDF	A results report	The title, a participation box ("171 of 212 voted, 81% participation"), and a results table per question, with ✓ for a winner and TIE for a tie. It includes instant-runoff rounds and written answers.
Certificate	The certificate of results (PDF)	The formal record described in the next section.
Per-voter	A spreadsheet file, identified ballots only	One row per counted ballot: Ballot #, Voter (when names are on file), Email, Submitted, Source (online, paper or in person), Weight (on weighted elections), then each question with that voter's answer. If the election requires an electronic signature, three more columns follow Source: Signed name, Signed address and Signed at, which are what the voter typed to sign online and when. They are blank for a ballot entered from paper, which carries its signature on the sheet. Header rows give the election, organization, status, "Ballot secrecy: Identified", the number of counted ballots, any voided ballots left out, and the certification the voters signed.
Audit package	A .json file, once voting has closed	The election's full record in one file: its settings, the audit log with every fingerprint, the saved results, proxy records, how ballots were cast and verified, the paper ballot ledger, the inspector on record, and a fingerprint of the whole file. Voters' confirmation codes are left out. Anyone you give it to can check it at `vote.direct/verify`.

- **Per-voter** appears only on elections with identified ballots, the one mode that tells you who voted how. Anonymous and sealed elections never offer it.
- **Audit package** appears once the election has closed, with a line under the buttons: "The audit package is the full record of this election in one file. You, or anyone you give it to, can check it at vote.direct/verify." See Checking a record at vote.direct/verify.

- You can download before voting closes. The files then show the standings at that moment and mark the current leaders as winners. The per-voter file adds a note that voting is still open. Download again after close for the final record.
- Before a sealed-ballot election closes, the CSV and PDF downloads are refused, and the certificate records turnout only.
- If you download many files in a short time, you may see "Too many export requests. Try again later."

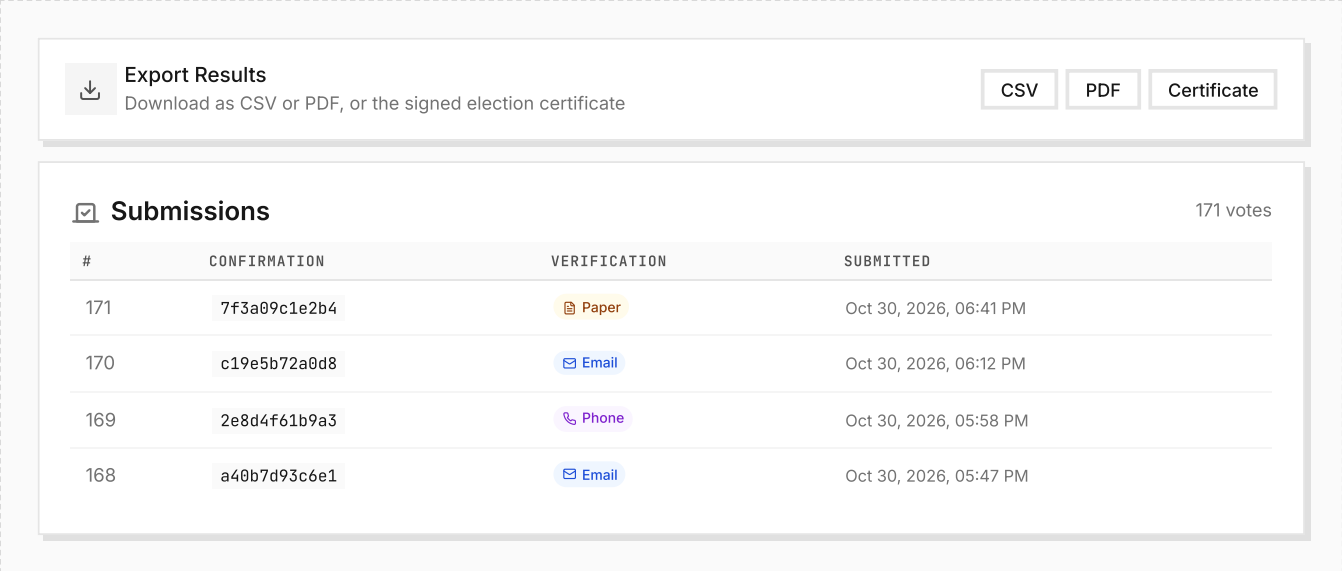


FIGURE 11.3 The Export Results card and the start of the Submissions table on the board election, which uses anonymous ballots. With no names to show, the table has no Voter column. An identified election adds Per-voter to the card and a column per question to the table. Once the election closes, the card adds Audit package.

The certificate of results

Press **Certificate** to download the certificate of results, a PDF titled "ONLINE ELECTION RESULTS CERTIFICATE". It is the document to file with your minutes or hand to a member who asks. Every time you download it, vote.direct generates it fresh from the current record, with a new certificate ID, and notes the download in the audit log. Dates on the certificate are in the election's time zone.

Its sections, in order:

Election details	Certificate ID, election status, when it was created, the voting period, when voting actually closed (only if it closed early or had no end date), time zone, verification method, whether option order was randomized, eligible voters, votes cast, verified votes and participation rate. Lines are added for proxy votes, ballots by channel (online, paper, in person), ballots versus members on a ballot-per-unit election, an approved voter list, and weighted voting.
Quorum status	Only when a quorum is set: "QUORUM MET" or "QUORUM NOT REACHED: RESULTS ARE ADVISORY ONLY", with the arithmetic, for example "171 of 212 eligible voters (81%), 25% required".

Election results	A table per question: Option, Votes, Percentage and Winner (ELECTED or TIED); weighted elections add weighted columns. Ranked, scored and approval questions carry a note on how they were counted. A measure with an approval threshold ends with a line naming the threshold, whether it was MET or NOT MET, and the count in favor.
Verification method breakdown	How the voters who cast counted ballots proved who they were: email link, email code, text code, proxy, paper ballot entered by staff, and so on, with counts and percentages.
Voter participation	Only when you ask for it (see below): each voter's name, verification method and time voted. It never shows how anyone voted.
Audit trail summary	The number of events in the audit log, and a table of the key ones: creation, publishing, each verification and ballot, quorum reached, the close, and paper ballot decisions.
Integrity verification	The result of rechecking the audit log ("Hash Chain Status: VERIFIED", or a warning if the check failed or could not run), the number of entries, and the chain head: the fingerprint of the latest entry.
Inspector of elections	Only when an inspector was appointed: their name and credential, then either their signed certification statement or a note that the record is preliminary.

To include the voter participation list, open the results page: press the results page button in the banner on the Results tab, or, once the election is closed, **Open results** in the election page header. As the organizer, you see an **Election Certificate** button there with an **Include voter list** checkbox beside it. Tick the box, then press the button.

ONLINE ELECTION RESULTS CERTIFICATE

Longleaf Ridge Homeowners Association

2026 Board of Directors Election

ELECTION DETAILS

Certificate ID:	CERT-4F8A2C1D-MH2K9QZ1
Election Status:	CLOSED
Voting Period:	Mon, Oct 19, 2026, 9:00 AM EDT to Fri, Oct 30, 2026, 7:00 PM EDT
Timezone:	America/New_York
Verification Method:	Email Verification (OTP)
Total Eligible Voters:	212
Total Votes Cast:	171
Participation Rate:	81%
Ballots by Channel:	online 166 · paper 5 · in person 0

QUORUM STATUS

QUORUM MET
171 of 212 eligible voters (81%), 25% required

ELECTION RESULTS

Board of Directors (choose up to 2)

Option	Votes	Percentage	Winner
Janelle Brooks	104	61%	ELECTED
Rosa Delgado	118	69%	ELECTED
Kevin Tran	87	51%	

VERIFICATION METHOD BREAKDOWN

Method	Count
Email magic link	158 (92.4%)
SMS code	8 (4.7%)
Paper ballot (entered by staff)	5 (2.9%)
Total members verified	171

INTEGRITY VERIFICATION

Hash Chain Status: VERIFIED

Audit entries: 642
Chain head (SHA-256): 5e0c2a91f7d3b648e2a05c7d9b31f4e6a8c0d27b5e93f1a4c6d8e02b7f9a3c51

INSPECTOR OF ELECTIONS

Walter Kim · Notary public

Results certified by the inspector of elections on 2026-10-31

"I, Walter Kim, Notary public, serving as inspector of elections for Longleaf Ridge Homeowners Association, certify that I reviewed the eligible-voter roster (212 eligible), the ballots received (171) and the tabulation for "2026 Board of Directors Election", and that the results reported are the results as tabulated. Quorum was met. The tabulated results carry integrity hash 9b1e4c7a0d2f8e63c5a17b94e0d3f6a2c8e1b57d4a09f3e6c2b8d71a5f0e4c93."

Signed: Walter Kim

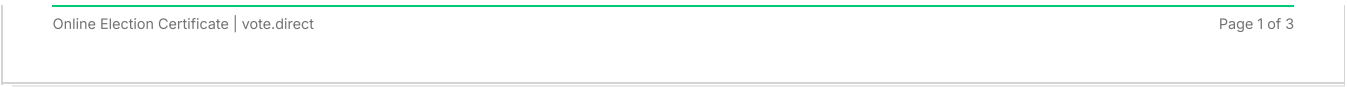


FIGURE 11.4 A shortened certificate for the board election: some detail lines, the audit trail summary and the closing lines are left out. The real document runs to several pages.

If an inspector was appointed but has not certified, the inspector section says the certificate is a preliminary record: "Awaiting the inspector's certification: this is a preliminary record" once they have accepted, or "Inspector appointed; acceptance pending: this is a preliminary record" before. If the appointment ended without a certification, the section says no independent certification is on record. A certificate downloaded while voting is still open shows the status and the standings at that moment, so download it again after close.

Submissions

The **Submissions** table lists every counted ballot, newest first, with the number of votes at the top right. The person who created the election, and the workspace's owners and admins, can see it.

Column	What it shows
#	The ballot's number, counting up from the first ballot cast.
Voter	The voter's name, with their email under it, or their email or phone number. Shown only when at least one ballot carries a name, email or phone number.
Confirmation	The ballot's confirmation code, the same code the voter was given when they voted.
Verification	How the ballot arrived or was verified: Email, Phone, Paper, Paper · meeting, or No verification.
Submitted	The date and time the ballot was cast.
One column per question	Identified ballots only: each voter's answer, or "No answer" when they skipped an optional question.

What the table shows depends on the election's ballot secrecy setting:

- **Identified.** Names, and how each person voted, question by question.
- **Anonymous.** Never names, email addresses or phone numbers, and never answers. You see that a ballot was cast, its confirmation code, how it was verified and when.
- **Sealed.** Nothing until the election closes. The table reads "Sealed ballot box" and explains that ballots are stored with no link to the voter. After close, it lists the ballots by confirmation code, in no particular order, with the day cast but not the time.

A ballot set aside under your election's rules, for example an online ballot from a member whose paper ballot was received first, is kept in the record but not listed here or counted. Before the first ballot, the table reads "No votes submitted yet".

The audit log

The **Audit Log** is the election's history: every action recorded in order, from the moment the election was created. Each entry carries a fingerprint (a SHA-256 hash) computed from its own contents and from the entry before it, so the entries form a chain. If a recorded entry were edited, moved or deleted afterwards, the chain would no longer check out. That makes the log tamper-evident: a later change shows up when the log is checked. It is not a promise that a change is impossible.

Each row shows what happened, who did it, the time, and the first characters of the entry's fingerprint (hold the pointer over it to see all of it). "System" means vote.direct did it automatically. A person appears as "User" or "Voter" followed by the first characters of an internal code, never by name, and your inspector's actions show as "inspector". Times in the audit log are shown in UTC (Coordinated Universal Time), not your local time. Repeated "Results Accessed" entries by the same person are folded into one row with a count and a time range. Long histories scroll inside the card.

Press **Verify Integrity** to recheck every fingerprint now. The result appears beside the button: a green "Verified" with the number of entries, or a red "Integrity Error" with the number of the first entry that failed. The certificate prints the same check, with the chain head.

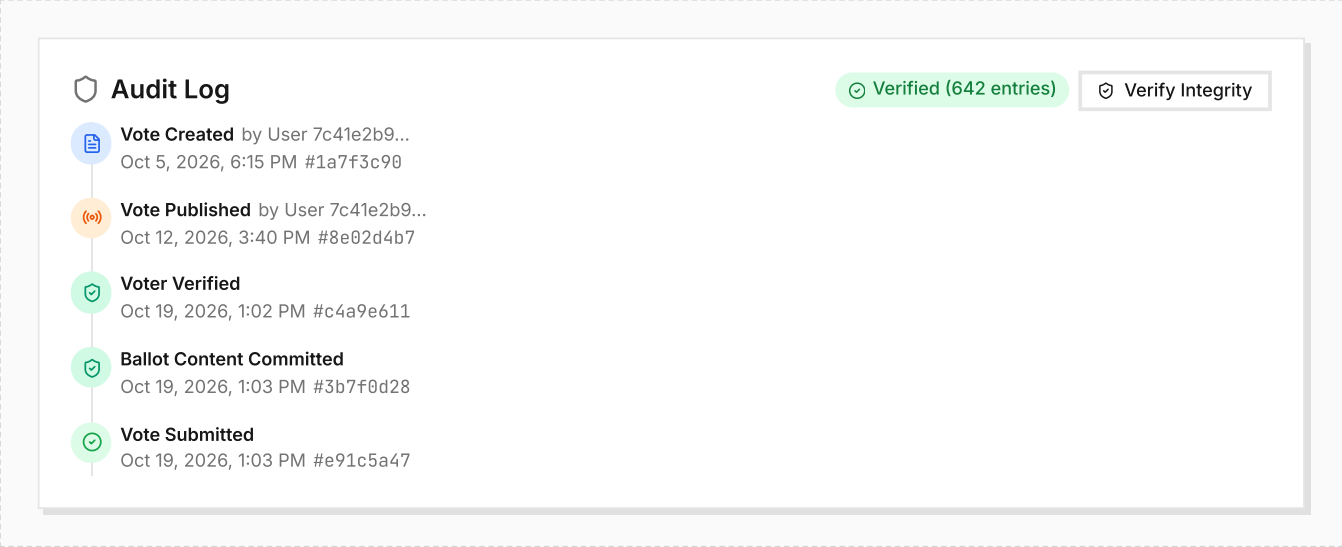


FIGURE 11.5 The first entries of the board election's audit log after Verify Integrity was pressed. Times are in UTC: the first voter verified at 9:02 AM in North Carolina.

What the audit log does not prove

The chain shows that the recorded entries have not been changed since they were written. It does not prove that the right people were on your voter list, that each voter was who they said they were (the verification method on each ballot records how they proved it), or that the election was run the way your governing documents require. The record is also written by vote.direct. Copies kept outside vote.direct are what anchor it: a certificate filed with your minutes on the day, which prints the chain head, and your inspector's signed certification, which names the integrity hash.

What your voters see

Voters see results at the election's results page, `vote.direct/v/2026-board-of-directors-election/results`, which the **Open results** button in your header opens once the election is closed. When your setting allows it, the page shows the title, the number of votes, the bars and the winners, with buttons to save the page as a PDF and share the link. When results are not available yet, voters see "Results Not Available Yet" with the reason, or a locked screen when anonymous voting has fewer ballots than your minimum. For the voter's whole journey, see What your voters see.

Checking a record at vote.direct/verify

Anyone can check an election record at `vote.direct/verify` without trusting vote.direct. The page takes the election's audit package, a .json file you download with **Audit package** on the Results tab once voting closes (see Downloads). Your inspector of elections can also download it from their inspector page (see Inspectors and state rules). Drop the file on the page, or press **Choose file**. The page recomputes every fingerprint in the audit chain, and for a sealed election it checks the ballot box against the checksum recorded when the box was shuffled at close. The check runs in the visitor's own browser, and the page does not upload the file. The result reads "Verified", "Does not verify" or "Cannot be checked", with a line for each part that was checked. Like the audit log itself, it shows that the record has not been altered since it was written; it does not show who was eligible or whether the election followed your rules.

CHAPTER 12

Paper, mail and in-person ballots

Some members vote on paper: a packet in the mail, or a ballot handed to them at a meeting. This chapter shows how to set that up, print or mail the ballots, take them back in, and enter each one so it counts in the same tally as the online votes.

IN THIS CHAPTER

- Before you start
- Choose who votes on paper
- What paper adds to publishing
- The Paper ballots page
- Choose who handles the paper
- Counting links and receiving links
- Set up the packet
- Generate the ballots
- Print and mail them yourself
- Have vote.direct mail them
- The ledger
- Ballots at a meeting
- What the printed ballot looks like
- Enter a returned ballot
- When a member votes twice
- Receive envelopes with a phone
- Photograph envelopes and ballots at the count
- The page a ballot's QR code opens
- Deadlines and closing

Before you start

A paper ballot on vote.direct is a numbered sheet printed for your election. A member marks it by hand. It comes back, and a person enters its marks on the **Enter ballots** screen. From that moment it counts in the same tally as the online votes, and your result certificate shows how many ballots arrived online, on paper and in person.

Mail ballot	A packet sent by mail: a notice page, the ballot, candidate statements if you add them, and room for a return envelope. It is printed for one named member, the voters your roster lists as **Paper by mail**. The sheet itself is headed "Official Absentee Ballot" unless you change that heading in Setup.
Meeting ballot	The ballot page only, headed "Meeting Ballot" unless you change it in Setup, handed out at a meeting. It can be printed for a named member, the voters your roster lists as **Paper at the meeting**, or left blank.

Paper ballots work only when all of these are true:

- The election's **Who can vote** setting is **Invite list only**. On an election anyone can open, the page refuses to make ballots with "Paper ballots need an invite list; this vote is not private."
- The election does not use sealed ballots. With sealed ballots the Paper ballots card says **Not available with sealed ballots**, because a paper ballot has to stay linked to its member for the duplicate rules to work. Use standard anonymous voting for an election that mixes paper and online votes.

- If your election gives an owner of several units a separate ballot for each unit (**One email, a ballot for each unit** or **A separate email per unit**), only owners of one unit can vote on paper. A paper ballot does not say which unit it is for, so an owner of several units is skipped when ballots are made and votes each unit online. With **One ballot for all of their units**, paper works for every owner.
- You created the election, or you are an owner or admin of its workspace. Only those accounts can open the Paper ballots page and the Enter ballots screen. Anyone else who opens the address is taken back to the election page, or sees a page-not-found screen. To let someone else enter ballots, give them a counting link (see Counting links and receiving links).

> PLAN YOUR QUESTIONS FOR PAPER
>
> Only single choice, multiple choice and yes/no questions can be entered from paper. Every other question type still prints on the ballot with its own instructions, but the Enter ballots screen records it as blank. If any member will vote on paper, build the ballot from those three types only.

> THE BALLOT LOCKS
>
> Once any paper ballot exists, you cannot change the ballot's questions or choices. The Ballot card on the election page says: "Paper ballots have been generated, so the ballot is locked. Void them on the Paper ballots screen to make changes." Finish and proofread the ballot before you generate paper ballots.

Printed notices and voting codes are a different thing. They carry a code that opens the online ballot, and nothing is marked by hand. See Invitations and reminders.

Choose who votes on paper

Each voter on your roster has a **How they vote** setting. You find it in the **How they vote** column of the voter list on the election's Voters tab. Two of its five choices mean paper.

How they vote	What it means on screen
Email link	"Gets a personal voting link by email."
Text message	"Gets a personal voting link by text."
Paper by mail	"Gets a printed ballot packet by mail and returns it."
Paper at the meeting	"Marks a paper ballot at the meeting; staff enter it."
Voting code	"Votes online with a printed code, e.g. at a shared device." This is an online ballot, not a paper one.

1. Open the election and go to its voter list. In the **How they vote** column, pick **Paper by mail** or **Paper at the meeting** for each member who votes on paper. A small chip, **paper** or **meeting**, appears next to the name.

2. For **Paper by mail**, the member needs a complete mailing address: street, city, state and ZIP. Open the member's record and fill in **Mailing address**. Until the address is complete, the row shows the chip **needs mailing address**.
3. To add someone who has no email and no mobile number, use **Add voters**, then **Type in**, and open **Mailing address** under the row. The row then reads "No email or mobile, so this member is reached by mail." You can also bring addresses in from a spreadsheet. See Voters and your roster.

A member set to paper, to the meeting, or to a voting code is never emailed or texted. The voter list says so above the rows, for example "5 members vote on paper and are never emailed or texted. Their ballots are tracked on the Paper ballots page." Plan their notices and reminders by mail or in person. Once a member has voted, their **How they vote** menu is locked.

Stop online voting before a meeting

If members can also vote at a meeting, you can stop the online ballot when the meeting is called to order while paper and in-person ballots are still accepted. In the wizard's timing step, the field is **Close online voting earlier at (optional)**. On a saved election, edit the schedule in the election's settings: the row is **Online voting closes**, and it reads **With the vote** when no cutoff is set. The time must be at or before the election's close. Only the web ballot stops there. Paper and in-person ballots can still be entered until the election closes.

What paper adds to publishing

As soon as one voter is set to **Paper by mail** or **Paper at the meeting**, two items join the list of what is left before you publish. You cannot publish until both are done. If a publish is refused for this reason, the message points you to the Paper ballots page with **Open Paper ballots**. See Test, then publish.

Item in the list	Its button	Done when
Choose how 5 paper voters are handled	**Set up paper ballots**	You pick who handles the paper. The item then reads "Paper ballots configured", followed by the tier.
Assign who counts the paper ballots	**Assign a counter**	On Self-print or We mail them, you name yourself or create a counting link. The button opens the Paper ballots page on its **Returns & counting** tab, where that is done. On Full service it is done for you and reads "Vote.Direct counts the returned ballots".

You can set up the packet and generate the ballots while the election is still a draft. On a draft's checklist card, the line **Also set up here, no publish needed** links to **Paper & in-person ballots**. Entering and counting ballots starts only when the election is live.

Once the election is live, its checklist follows the paper all the way to the tally. It shows "Print 5 paper ballots" until the ballots exist, then "Enter 5 paper ballots" until every ballot is entered or set aside, then "All 5 paper ballots recorded". A paper ballot is not in the results until its marks are entered.

The Paper ballots page

Open it with **Open paper ballots** on the Paper ballots card. The card sits in the Voters section of the election page once anyone votes on paper. Otherwise it is under **More ways to deliver ballots and help voters**. The card has two buttons, **Open paper ballots** and **Enter ballots**, and once ballots exist it counts how many are **Generated**, **Mailed**, **Received** and **Counted**. The dark button is the next step: **Open paper ballots** while every ballot is still to print, **Enter ballots** once one has gone out or come back. The **Reach voters in more than one way** card at the top of the Voters section has the same **Open paper ballots** link.

The page header carries **Back to election**, the title **Paper ballots**, a chip naming who handles the paper with a **Change** link, the election title and a status line that follows the ballots, such as "5 mail ballots · 0 mailed · 0 counted". Voided ballots are left out of that count, and a ballot that has come back still counts as mailed. On a draft election a line under it says what publishing still waits on here, for example "It can publish once someone is named to count the ballots", or, once nothing does, links **Publish it from the election page**. On the right is a refresh button and, once a ballot exists, **Enter ballots**. That button is outlined while the ballots are still to print, and turns dark once a ballot has been mailed, handed out or returned, because entering is then the next step. On Full service it stays outlined and reads **Enter a ballot**, because vote.direct enters the returns. Use it there only for a ballot that reached you directly.

Under the status line, one line points back to the online half of the election: "Email and text ballots go out from the election's Voters tab. Paper voters are left out of those sends." **Voters tab** is a link.

The first time you open the page it asks one question, who handles the paper (see Choose who handles the paper), and shows nothing else. Once you choose, five tabs appear under the header, in the order the work happens:

Tab	What you do there
Setup	Decide what prints on every packet, and open a sample of it.
Print & mail	Step 1 generates the mail ballots from your roster. Step 2 gets them out: you print and mail them, or vote.direct mails them.
Meeting ballots	Generate the ballots handed out at a meeting, and download the meeting kit.
Returns & counting	Say who counts, see how many ballots are counted, and follow the envelopes when someone photographs them.
Ledger	See every ballot and its status. Reprint, replace or void one.

The **Returns & counting** tab tells you on its own label when it needs you. It reads **Returns & counting (needs a counter)** until someone is assigned to count, and, for example, **Returns & counting (3 to review)** when photographed envelopes are waiting for a decision. The **Meeting ballots** and **Ledger** tabs show how many ballots they hold.

After that first choice, the page opens on the tab that holds the next piece of work, so you do not have to find it:

Where the paper stands	The page opens on
No ballot exists yet	Setup
Mail ballots are waiting to go out, and none has come back	Print & mail, with the download or the mailing in view
The only ballots are meeting ballots, and none is entered	Meeting ballots
Every mail ballot is mailed, or any ballot has come back	Returns & counting

A link that names a tab, such as a button on the election's checklist, opens that tab. And the page never moves you by itself: finishing a step leaves you on the tab you are on.

Choose who handles the paper

A new election opens this page with one question: **Who handles the paper ballots?** Paper ballots are printed, mailed out, returned and entered into the count. The answer decides who does each part.

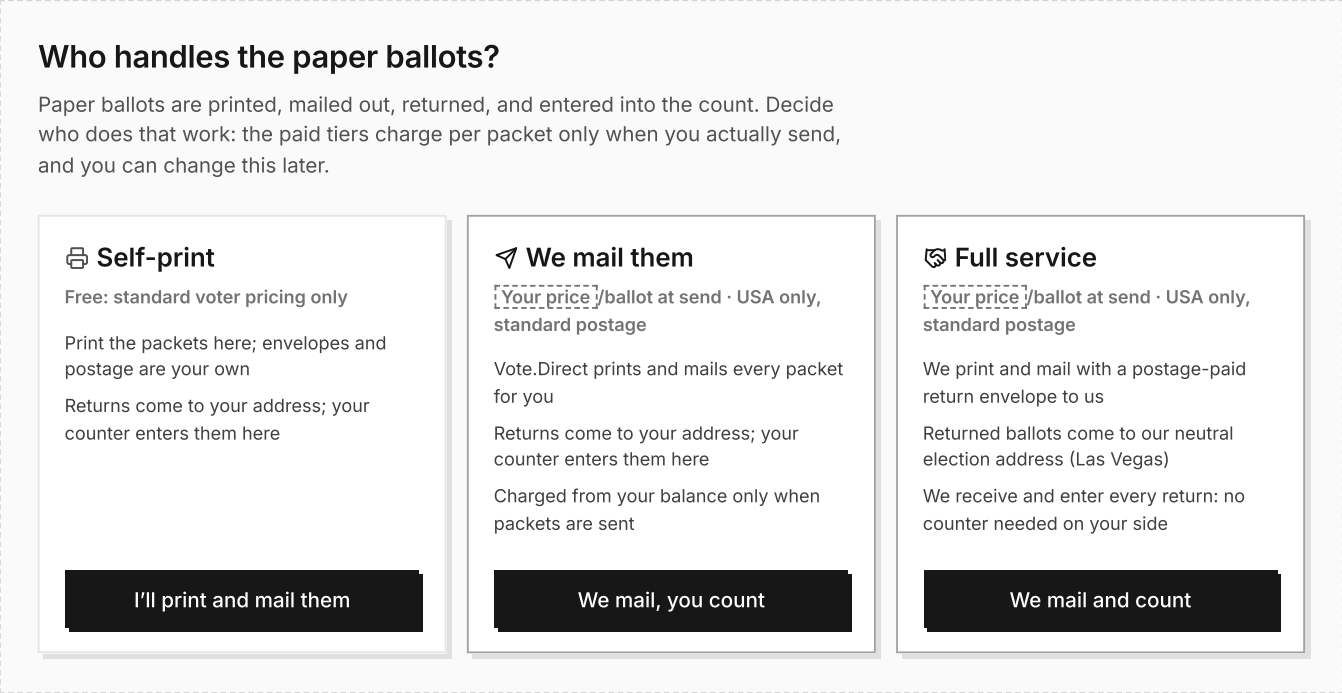


FIGURE 12.1 The first question on a new election's Paper ballots page. The per-packet price for each paid tier appears where the figure shows Your price.

Tier and button	Who prints and mails	Where ballots come back	Who enters them	Cost
Self-print I'll print and mail them	You print the packets from this page. Envelopes and postage are yours.	Your return address	Your counter	Free: standard voter pricing only

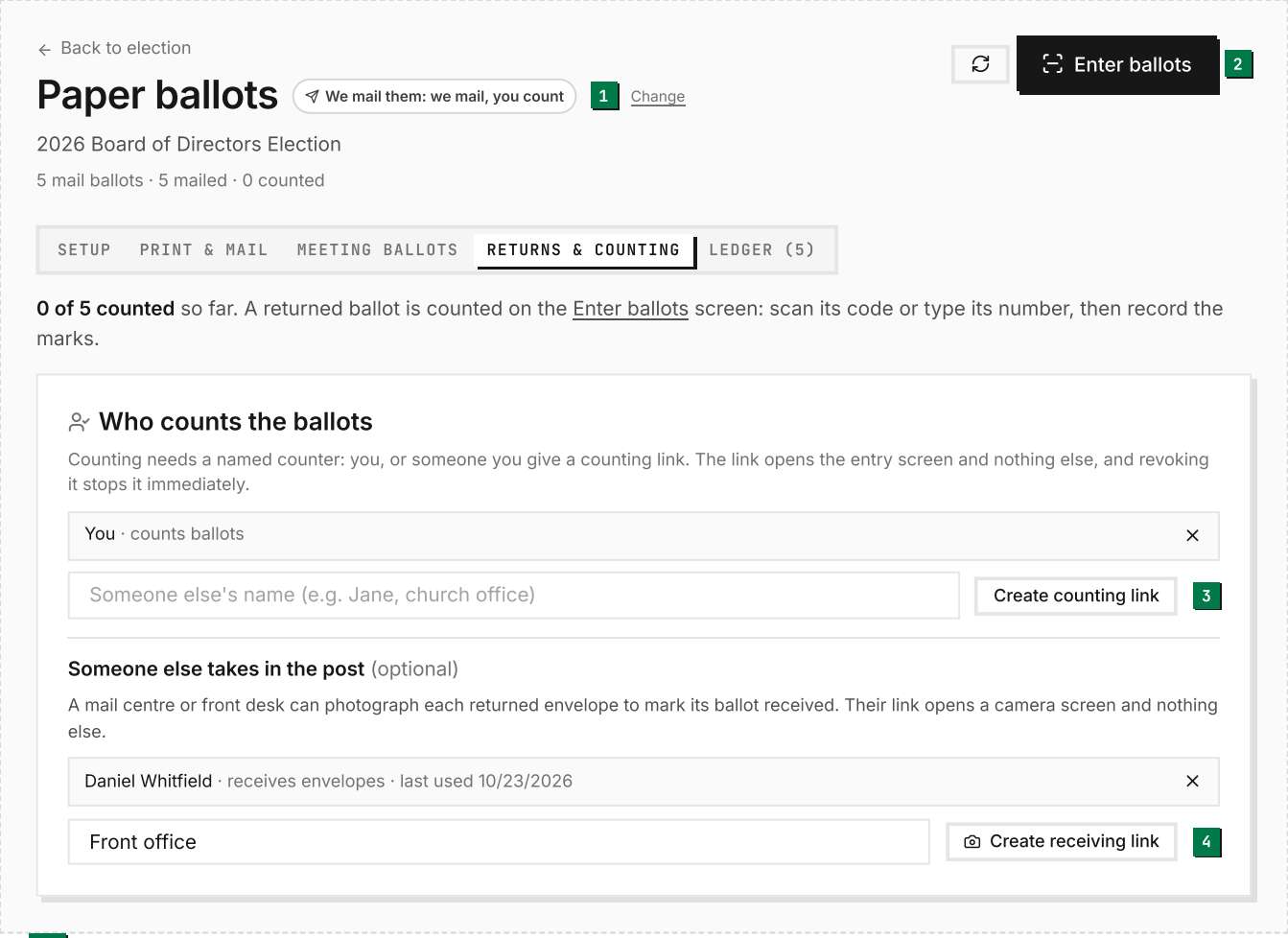
Tier and button	Who prints and mails	Where ballots come back	Who enters them	Cost
We mail them **We mail, you count**	vote.direct prints each packet and hands it to the postal service, First-Class, USA addresses only	Your return address. The packet can carry a return envelope addressed to you; the member adds a stamp.	Your counter	A price per packet, charged from your balance only when packets are sent
Full service **We mail and count**	vote.direct prints and mails each packet with a postage-paid return envelope	vote.direct's neutral election address in Las Vegas	vote.direct. You need no counter.	A higher price per packet, charged when packets are sent

The price per packet shows on each card and again in the confirmation before anything is sent. Choosing a paid tier costs nothing by itself. See Billing and payments and vote.direct/pricing.

- Your choice shows as a chip next to the page title, in the card's own name: **Self-print: you print, mail and count**, **We mail them: we mail, you count**, or **Full service: we mail and count**. **Change** reopens the chooser; **Keep current setup** closes it again.
- Under the cards, **See managed elections** opens vote.direct/managed-elections. vote.direct can run the whole election, paper side included, but that is arranged with vote.direct, not picked here. See Managed elections.
- An older election that already had ballots before this choice existed keeps its tabs and shows a yellow banner above them: **Who handles the paper ballots for this election?** with a **Choose** button. It opens the same three cards; **Not now** closes them again. Your ballots stay as they are.

Counting links and receiving links

Open the **Returns & counting** tab. Its first line says how many ballots are counted so far, for example "0 of 5 counted", and links the **Enter ballots** screen where a returned ballot is counted. Before any ballot is out it says "No ballots are out yet, so none can come back.", and adds a sentence asking you to name a counter only while nobody is named. Under it, the **Scans and reconciliation** card opens the page where every photographed envelope and ballot is checked, reconciled and counted (see Photograph envelopes and ballots at the count). The next card, **Who counts the ballots**, decides who may enter ballots. Its second part, **Someone else takes in the post (optional)**, is for a mail centre or front desk that photographs the returned envelopes. On Full service, where vote.direct counts, the card is **Who receives the envelopes** and offers receiving links only.



1. Who handles the paper. **Change** reopens the chooser.
2. Opens the Enter ballots screen.
3. A counting link for someone who will enter ballots.
4. A receiving link for whoever collects the returned envelopes.

FIGURE 12.2 The Returns & counting tab on the We mail them tier, with Priya assigned as counter and a receiving link for the board secretary. The Scans and reconciliation card, which sits between the first line and Who counts the ballots, is left out here.

	Counting link	Receiving link
Opens	The Enter ballots screen, at an address starting `vote.direct/count/`. A button at its top, **Photograph every envelope and ballot**, opens the scanner at an address starting `vote.direct/scan/`.	The scanner for arriving envelopes, at an address starting `vote.direct/receive/`
Can	Find ballots, attribute meeting ballots to members, record receipt, add photos, enter marks, count, and record a ballot as not counted. In the scanner: photograph envelopes as they arrive, envelopes at the count and ballots, and type in a count by hand.	Photograph each returned envelope as it arrives, and type in a count by hand. An envelope matched to its home marks that ballot received.
Cannot	Void, replace or print ballots, change the setup, open the ledger, or open Scans and reconciliation	See what a photo was read as, or look up, enter or count a ballot

	Counting link	Receiving link
Offered on	Self-print and We mail them	Every tier

1. To count yourself, press **I'll count them myself**, the dark button while nobody is assigned. A row reading "You · counts ballots" appears.
2. To give counting to someone else, type their name and press **Create counting link**. For envelopes, type a name under **Someone else takes in the post** and press **Create receiving link**.
3. The new link appears once, with a **Copy** button. Copy it and send it to that person. It is not shown again. Neither link needs an account.

To revoke a link, press the X at the end of the person's row. There is no confirmation, and the link stops working at once ("Revoked: the link stopped working"). A row shows when its link was last used.

On a secret ballot election (see Set up the packet), a counting link never sees whose ballot it is: the name reads "Secret ballot", and units and contact details are hidden.

The Envelopes received card

Every envelope photographed as it arrives lands in the **Envelopes received** card on the **Returns & counting** tab, whoever took the photo: a receiving link, a partner sign-in, or a counting link or you in the scanner's **Envelopes as they arrive** pass. Envelopes photographed again at the count are not added here; they are compared on the Scans and reconciliation page. On Self-print and We mail them the card appears once you have created a receiving link, or once an envelope has been photographed. On Full service it is there from the start. Its description ends: "A photo marks an envelope received; a ballot is counted only when its envelope is opened." Until the first photo it holds one more line: "No envelopes photographed yet. Each photo taken through a receiving link or a partner sign-in lands here." After that, five tiles count the envelopes: **Photographed**, **Received**, **For review**, **Second envelopes** and **Not ballots**. Each photo is read shortly after it is taken, so an envelope can take a moment to show as received.

Two buttons switch the list between **Needs a decision** and **Every envelope**. Each row shows the envelope's photo, its running number, the time, and what was read from its return corner. An envelope that could not be matched waits for you to decide:

- Press one of the suggested ballots, shown as **Ballot 000002 · Grace Okafor**, or type the number in **Ballot number** and press **Match this ballot**.
- Press **Not a ballot**, then **Yes, not a ballot**, for a photo of anything else. **Keep it** cancels.
- An envelope logged as damaged or late is flagged for a look even when it matched. Press **Looked at it** once you have checked it.

When nothing is waiting, the card reads "Every photographed envelope is matched. Nothing to decide."

Set up the packet

The **Setup** tab decides what prints on every packet: "the meeting notice (page 1), the ballot (page 2) and the candidate statements (page 3). Ballots are numbered and carry a QR code automatically." Each part is a section you open with a click, and every section starts closed. A closed section shows one line of what prints from it, and says plainly what is missing, for example "no contact email or phone prints" or "no return deadline prints". A check mark means the section is filled in, and a section that is missing something required opens itself with a yellow chip. Press **Save setup** when you are done; it reads **Saved** when nothing has changed. Packets are built from the saved setup each time you download or mail them, so save before you print. At the foot of the tab, **Next: Print & mail** takes you to the next tab. With unsaved changes it reads **Save and go to Print & mail** and saves first.

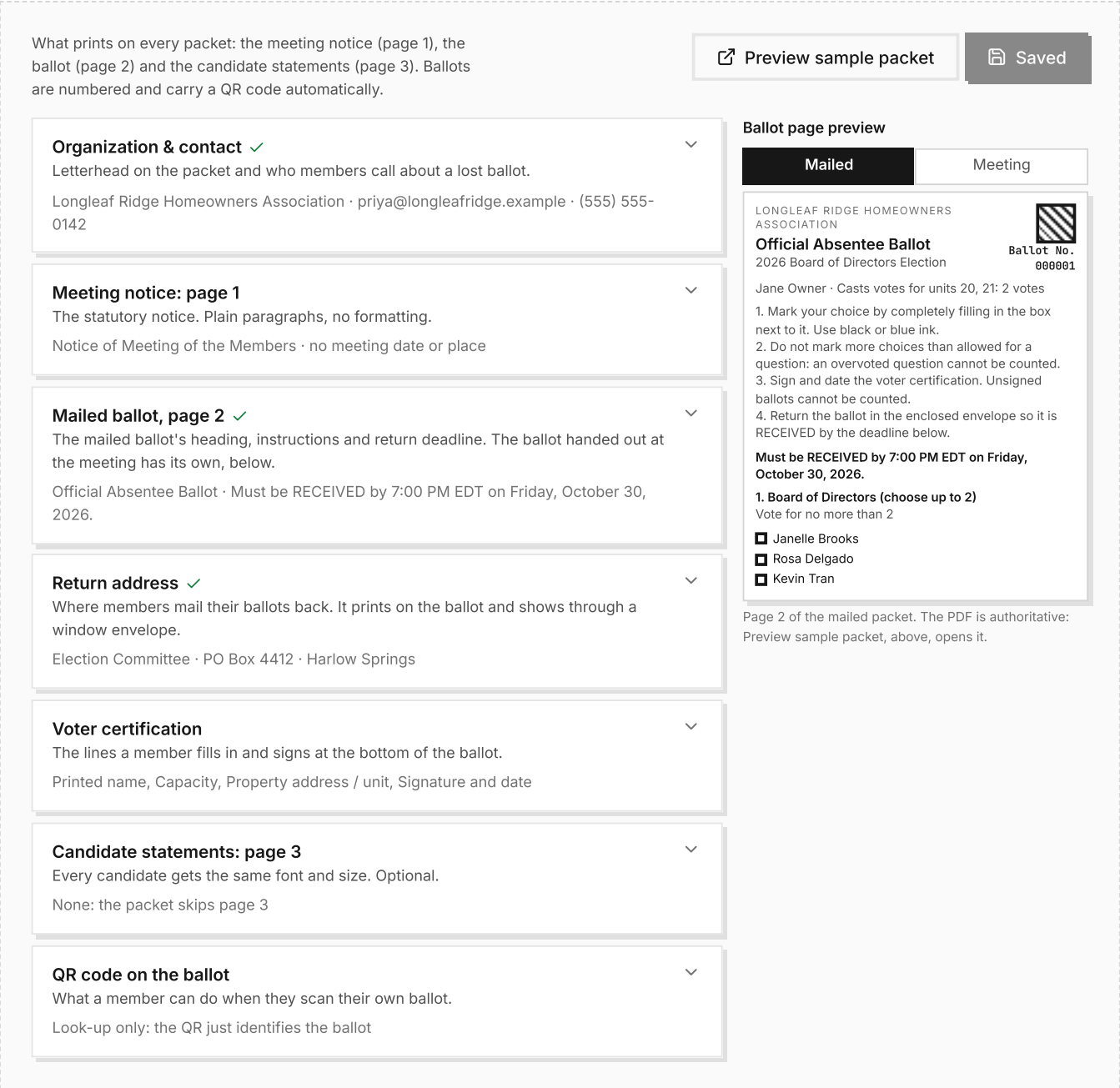


FIGURE 12.3 The Setup tab for Longleaf Ridge with every section closed, and the preview beside it (cut short here). The preview uses a sample name; the real packet prints each member's own.

Section	What you set	What it starts with
Organization & contact	**Organization name** (the letterhead), **Administrator**, **Contact email**, **Contact phone**, **Replacement instructions**, **Online voting hint**	Your organization's name. Replacement instructions: "Lost or spoiled ballot? Contact the administrator for a replacement; the original will be voided." Online voting hint: "Members who received an online ballot may vote online instead. Only the first ballot received from each member is counted."

Section	What you set	What it starts with
Meeting notice: page 1	**Heading**, **Called by**, **Purpose**, **Meeting date**, **Meeting time**, **Place**, **Backup place**, **Paragraphs** and **Agenda** (one per line)	Heading "Notice of Meeting of the Members". Purpose "To vote on:" followed by the election title.
Mailed ballot, page 2	**Mailed ballot heading**, **Mailed ballot instructions** (one per line), **Deadline (printed in bold)**, **Write-in lines**, **Secret ballot (envelope variant)**	Heading "Official Absentee Ballot" and four numbered instructions (see What the printed ballot looks like)
Meeting ballot	**Meeting ballot heading**, **Meeting ballot instructions** (one per line)	Heading "Meeting Ballot" and the four standard meeting instructions, shown in the box until you change them. Clear the box to go back to the standard wording.
Return address	**Name**, **Address line 1**, **Address line 2**, **City**, **State**, **ZIP**	Empty on Self-print and We mail them. On Full service it is vote.direct's address and cannot be edited.
Voter certification	Which lines the member fills in and signs, your own extra lines, the certification text, and whether it prints on meeting ballots	The **Association** set of lines
Candidate statements: page 3	One entry per candidate: **Candidate name**, **Units**, **Statement**. Offered only when a question has choices.	None. "No candidate statements. The packet skips page 3."
QR code on the ballot	**Photo submission** and **Vote online instead**	Both off

Mailed ballot, page 2

- **Deadline (printed in bold)**: leave it blank and the ballot prints "Must be RECEIVED by" followed by the election's close date and time. Type your own sentence to replace it. The preview and the closed section both show the exact line that will print. If you write nothing and the election has no close date, no deadline prints at all; the field says so, the **Print & mail** tab warns you while ballots are still to go out, and the instructions leave out the words "so it is RECEIVED by the deadline below", which would point at nothing. See Deadlines and closing.
- **Instructions** print exactly as you type them, one numbered line each, except that a pointer to the deadline is left out when no deadline prints. The meeting ballot has its own heading and instructions, set under **Meeting ballot** below; the preview's **Meeting** view shows them.
- **Write-in lines** appears only when a question accepts write-in candidates. Blank means 2 lines, 0 means none, and a question never gets more lines than the write-ins it accepts.
- **Secret ballot (envelope variant)** "Moves the certification off the ballot onto its own page; the member signs the outer envelope." The ballot sheet then carries no name, only its number and QR code.

Return address

On Self-print and We mail them, this is where members mail their ballots back. It prints on the ballot and, when vote.direct mails the packet, shows through the window of the return envelope. If it is empty, the section opens itself with the chip **No return address** and the summary "The ballot would print with no way back to you".

vote.direct will not mail packets without it.

Voter certification

These are the lines at the foot of the ballot that a member fills in and signs. Start from one of three sets under **Start from**:

Set	Lines
Association	"Printed name, capacity, property address or unit, signature and date."
Membership	"Printed name, signature and date. No unit numbers, no capacity."
Signature only	"A signature and date. Nothing else is asked for on the ballot."

Then tick or untick single lines under **Lines on the ballot**: **Printed name**, **Capacity (owner, trustee, officer, agent)**, **Property address / unit**, **Mailing address**, **Email**, **Phone**, **Member number** and **Signature and date**. **Add line** adds up to four lines of your own, printed above the signature. Edit the sentence itself in **Certification text**.

Setup warns you when the block cannot do its job. Without a signature line it says "No signature line. The member fills in the lines above but never signs, so nothing on the ballot ties the marks to a person at the count." If your instructions still tell members to sign, it adds "Your printed instructions still tell them to sign. Edit them under Mailed ballot or Meeting ballot so the sheet does not contradict itself." The **Meeting ballot** section warns the same way when the meeting ballot has nothing to sign but its instructions ask members to sign.

The switch **Print it on meeting ballots** is on by default. Turn it off when members sign the check-in sheet at the door instead. Mailed ballots always carry the certification.

> GOOD TO KNOW
>
> The notice section is labeled as the statutory notice. What your notice must say, and how far ahead it must go out, is set by your governing documents and your state's rules, not by this page. This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

QR code on the ballot

Every ballot carries a QR code. These two options decide what a member can do when they scan their own ballot. Both are off unless you tick them.

- **Photo submission**: "they can photograph the marked ballot straight into a review queue. The photo never counts by itself; the counter checks it and enters the marks."
- **Vote online instead**: "a member whose ballot is linked to the roster can follow the QR to cast online. First ballot received wins, exactly as with any online-plus-paper pair."

With both off, the QR page tells the member what their ballot is and how to return it. See The page a ballot's QR code opens.

The preview

Beside the sections, **Ballot page preview** draws the ballot page as you type. Switch between **Mailed** and **Meeting** to see either sheet. A question type that cannot be entered from paper shows as "not printable as a paper question". The preview is a sketch. **Preview sample packet** opens the real PDF: your packet as it will print, made out to a sample voter, with ballot number 000000 and the word SAMPLE across every page. It needs no ballot, so you can open it before you generate any. It shows the sheet chosen beside the preview, **Mailed** or **Meeting**, and it shows the saved setup, so save first to see your latest edits.

Generate the ballots

Mail ballots are generated on the **Print & mail** tab, in step 1, **1. Generate the ballots**. The normal way is straight from your roster: every voter set to **Paper by mail** gets a ballot linked to their own row. Generating a ballot prints and mails nothing; that is step 2. If you are handing ballots out at a meeting instead, a line in step 1 takes you to the **Meeting ballots** tab (see Ballots at a meeting).

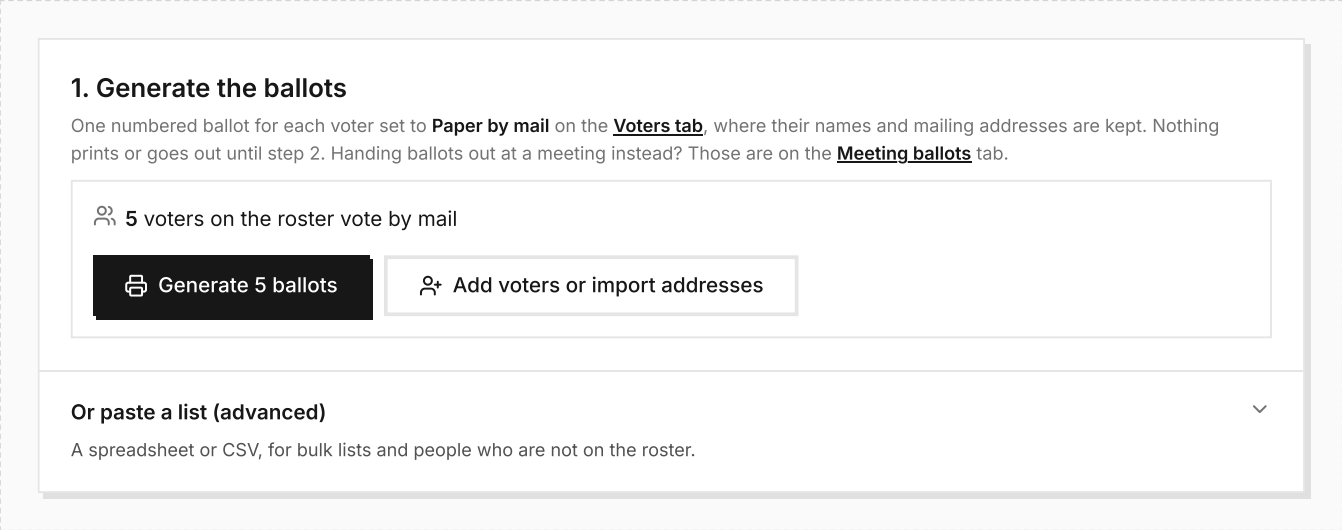


FIGURE 12.4 Five Longleaf Ridge members are set to Paper by mail, so one press generates their five ballots.

1. Read the roster line. It says how many voters are set to **Paper by mail**, how many already have a ballot, and how many still need a name and a complete mailing address, with a link to finish them on the Voters tab.
2. Press **Generate 5 ballots**. A green box under the button confirms "5 ballots generated" and points to step 2. The roster line now says "all 5 have a ballot, so there is nothing left to generate", and the Generate button is gone until someone new is ready. If any voter was left out, the same box lists them with the reason.
3. Go on to step 2 on the same tab. On Self-print it is **2. Print and mail them**. On the other tiers it is **2. Mail the packets**.

Each ballot gets the next number in order (000001, 000002 and so on) and its own QR code. Ballots generated from the roster create nothing new and cost nothing extra. The **Generate** button is offered only when a ballot can be generated. When none can, the roster line says why: "No one on the roster is set to Paper by mail yet.

Add them, or change how a voter votes on the Voters tab.", or how many voters still need a name and a complete mailing address, or that everyone already has a ballot. **Add voters or import addresses** opens the same Add voters window as the Voters tab, and it is the dark button while nobody is set to paper by mail.

A member who already has a live ballot of the same kind is never given a second one. Rows left out are listed with a reason:

Reason shown	What to do
not on the roster	Fix the email or phone, or add the member through Add voters.
already has a live ballot of this kind	Nothing. To send a new one, use Replace in the ledger.
appears twice in this request	Remove the duplicate row.
no mailing address	Add the address to the member's record.
holds more than one unit, and each unit gets its own ballot here; they vote each unit online	Nothing. That owner votes online (see Before you start).

Or paste a list (advanced)

This closed section at the foot of step 1 is for a bulk list or for people who are not on the roster. Open it and, under **This list is for**, pick **Mail ballots** for mailed packets or **Meeting ballots** for named ballots handed out at the door. Paste a spreadsheet or press **Upload CSV**. The columns are name, email, phone, units, weight and address (or line1, line2, city, state and zip), plus country and external_id. **Use the sample** fills in an example, and a table previews the rows before anything is made. Press **Generate** (it shows the number of rows) to generate the ballots; a green box then lists what was created and skipped, with a button to download the new ballots as a PDF. A row with an email or phone is linked to that member's roster row. A row with neither becomes a new paper-only member of the roster.

Leave **Also mail members with an email/phone who are not on the roster** unticked unless you mean it. Unticked, a row whose email or phone is not on the roster is skipped, because it is usually a typo. Ticked, those people get a ballot and join the roster as paper-only voters.

New paper-only voters are priced like any other voters you add. If they take the election past what you paid for, a yellow panel shows the exact difference before anything is charged. It offers a button to pay the difference from your balance and generate, a card payment button when it is the election's first charge, and **Not now**. See Billing and payments.

Print and mail them yourself

On Self-print, step 2 on the **Print & mail** tab is one card, **2. Print and mail them**. It shows two numbers: how many ballots are still to print and mail, and how many are mailed. Until ballots exist the card holds one line, "Nothing to print yet. Generate the ballots in step 1 first."

- **Download the ballots to print (PDF)**: one PDF of every mail packet, in ballot-number order. Every packet has the same page count, padded with blank pages where needed, so the stack collates cleanly.

- **Download address list (CSV)**: one row per ballot, in the same order as the PDF, for your own labels or a print shop.
- Two reminders under the buttons: print on both sides of the paper, and put a return envelope in every packet. Members mail the ballot back to your return address and pay the postage unless you pre-stamp the envelope.
- **Mark all as mailed**, on its own line at the foot of the card: records that the packets went into the post.

If no return address is set, the card warns "No return address is set, so the ballot prints with no way back to you." with a **Set it in Setup** link. Set it before you print. If no return deadline would print either, a second warning reads "These ballots print no return deadline: none is written in Setup, and the election has no closing date." Its **Write one in Setup** link opens the deadline field.

1. Download the PDF and the address list. Print, stuff and post the packets.
2. Press **Mark all as mailed**. The dialog **Mark all 5 mail ballots as mailed?** explains that they move from "generated" to "mailed" with today's date, that meeting ballots are not affected, and that the step is recorded in the audit log.
3. Press **Yes, mark as mailed**.

Once every mail ballot is marked mailed, the card says "All 5 mail ballots are in the post." with a link to count them on **Returns & counting**. The print reminders, the warnings and **Mark all as mailed** are gone, because nothing is left to send; **Download the ballots again (PDF)** and the address list stay for a reprint.

> GOOD TO KNOW
>
> Downloading a PDF never marks anything as mailed. Mark the ballots only after the packets have gone to the post office.

Have vote.direct mail them

On We mail them and Full service, step 2 on the **Print & mail** tab is **2. Mail the packets**. vote.direct prints each packet and hands it to the postal service, First-Class, to the address on the ballot. On We mail them, returns come back to your return address. On Full service, the packet carries a postage-paid return envelope to vote.direct, and vote.direct enters the returned ballots.

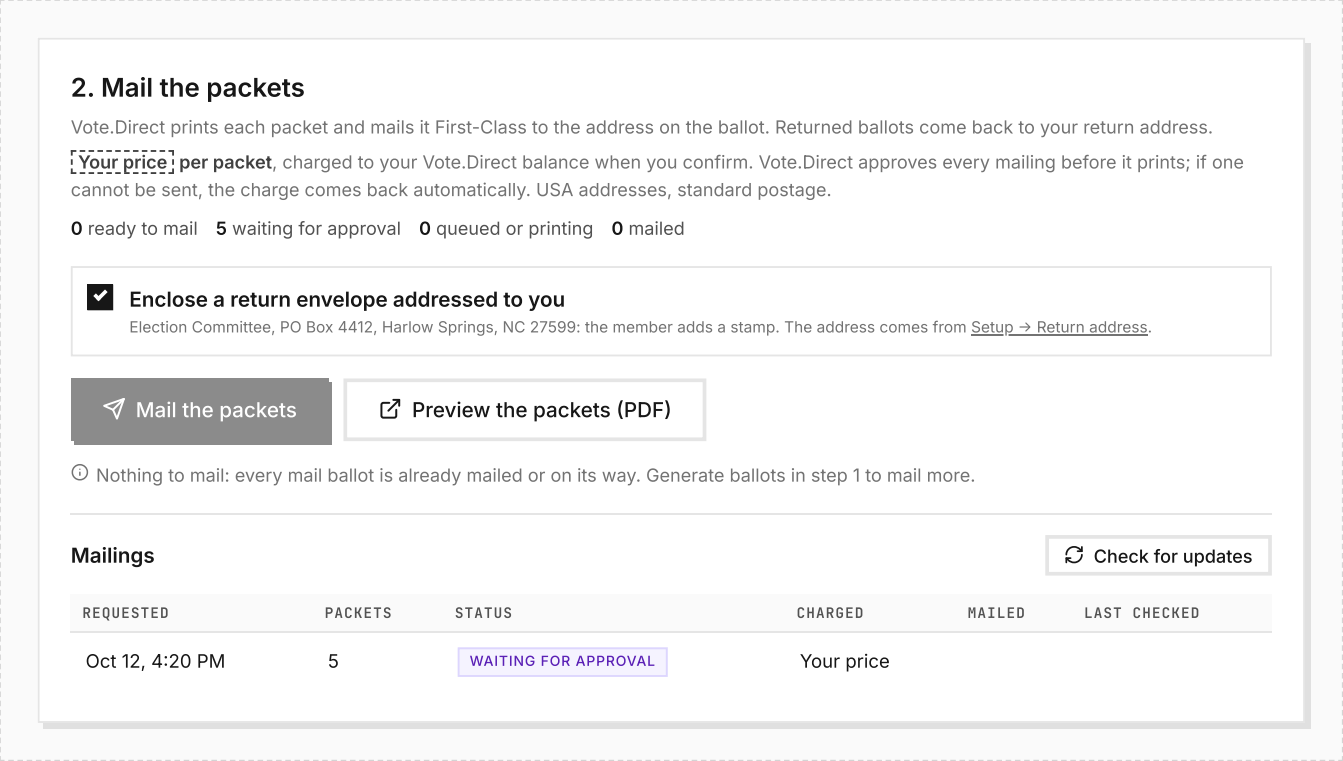


FIGURE 12.5 The mailing card on We mail them after Priya requested the five packets. Nothing prints until vote.direct approves the mailing. The charge for your mailing appears where the figure shows Your price.

1. On We mail them, check the return address first. Without one, the card says "Set your return address first" and the mail button stays off. With one, the box **Enclose a return envelope addressed to you** is ticked. Leave it ticked: the packet's notice and its return box say a return envelope is enclosed whether or not you tick it.
2. Read the price box. It multiplies the number of packets by the price per packet, says the charge comes from your vote.direct balance, and shows your balance. If the balance is short, it says so with an **Add funds** link.
3. Press **Mail 5 packets** (the button also shows the total). **Preview the packets (PDF)** opens every mail packet first if you want one last look.
4. Confirm. The dialog **Mail 5 packets for** (the total) describes the mailing in plain words, for example "First-Class Mail (USA addresses) · black on white paper · printed both sides · return envelope enclosed (the member adds a stamp)." It says the total is charged to your balance now, that vote.direct approves every mailing before it prints, and that "Once printed, a mailing cannot be recalled." Press the mail button in the dialog, or **Cancel**.

The mailing then waits as **Waiting for approval**. vote.direct reviews every mailing before it prints and emails you the outcome. An approved mailing's email has the subject "Your mailing for 2026 Board of Directors Election is on its way to print". A declined one reads "Your mailing for 2026 Board of Directors Election was not sent" and gives the reason. When a mailing is declined or cannot be sent, the charge is returned to your balance. The ballots of a declined mailing are ready to mail again.

Status	What it means
Waiting for approval	Charged and held. Nothing is at the printer yet.
Sending to print	Approved and on its way to the print service.
Queued for printing	Accepted by the print service.
Printing	Being printed.
Mailed	Handed to the postal service. The ballots move to Mailed in the ledger.
Not sent	Declined or failed. The row explains why, and any charge is returned to your balance.
On hold	"Vote.Direct is looking into this mailing." Nothing more is needed from you.
Cancelled	Cancelled before printing.

Once a mailing is approved, its progress at the printer shows only when you press **Check for updates**. The line beside it then reads, for example, "Checked Oct 15, 9:10 AM: 5 updated, 5 now mailed". In the ledger, each ballot in a mailing shows its mailing status under its own status.

- A ballot already in a mailing is never sent twice. To mail a member again, replace the ballot in the ledger and mail the replacement.
- vote.direct mails to USA addresses only. A mailing with bad addresses is refused and names them, for example "1 ballot has no mailable address: 000004 (missing city)". Fix the addresses on the Voters tab.
- Once the election closes, no more packets can be mailed.
- To see the packet in your own mailbox first, use **Send yourself a test ballot** on the election page and pick **Paper packet**. It is a real packet, priced per packet like the others, and nothing on it is counted. See Test, then publish.

The ledger

The **Ledger** tab lists every paper ballot: number, recipient, units, weight, kind, status, the dates it was mailed, received and counted, the reason for any status change, and how many photos it has. Search by name, ballot number or units (`123`, `#123` and `000123` all find ballot 123), or filter with **All statuses** and **All kinds**. The kind is **Mail** or **Meeting**. **Export ledger CSV** downloads the whole list with every date. To reload the list, use the refresh button beside the page title.

Status	Meaning
Generated	Printed, not yet recorded as mailed
Mailed	In the post
Received	Back in hand, marks not yet entered
Counted	Entered. Its votes are in the tally.
Rejected	Recorded as invalid, for example unsigned or unreadable

Status	Meaning
Set aside (duplicate)	The member's other ballot stands
Late	Recorded as arriving after the deadline
Void	Cancelled. It can no longer be received or counted.

Each row has these actions:

- **Reprint**: the ballot's PDF again, same number.
- **Enter** (**Open** once counted): opens the ballot on the Enter ballots screen.
- **Replace**, for a lost or spoiled ballot: "Voids this ballot and issues a new number to" the same member. Type a **Reason**, optionally a **New mailing address**, and press **Void & issue replacement**. Reprint or mail the new number.
- **Void**: type a **Reason** and press **Void ballot**. This cannot be undone. Voiding a counted ballot also removes its vote from the tally, and the member can vote again.

Void and replace stop when voting stops. After the close, the ledger is frozen: "This vote has ended; its paper-ballot ledger is frozen."

Ballots at a meeting

Meeting ballots are generated on the **Meeting ballots** tab. There are two kinds, and both print the ballot page only, headed "Meeting Ballot" unless you set your own heading in Setup, under **Meeting ballot**, with no notice page, deadline or return box:

- **Named meeting ballots** for members set to **Paper at the meeting**. When your roster has any, the top of the tab says how many, for example "3 voters on the roster vote at the meeting", with a **Generate 3 named ballots** button. Each is printed for its member and already linked to them, so it needs no look-up when it is entered. When nobody on the roster is set to the meeting, this part is not shown.
- **Blank meeting ballots**, for anyone else: type **How many blank ballots** (1 to 500, 25 to start) and press **Generate 25 blank ballots**. Each carries its own number and QR code but no name. The green box shows the number range and **Download these ballots (PDF)**. Blank ballots cost nothing.

A meeting ballot prints its own instructions, not the ones you set for the mailed packet. Unless you change them under **Meeting ballot** in Setup, they are the standard wording, which ends by asking the member to return the ballot to the election staff before the polls close.

> ADD WALK-INS BEFORE THE MEETING
>
> A blank ballot counts only after it is matched to a member on the roster. The Meeting ballots tab reminds you of this and warns when you print more blank ballots than the roster holds. The meeting kit tells the person at the door not to add anyone to the roster at the meeting. Follow both: add every member you expect to attend through Add voters before the meeting. A roster addition is priced like any other voter, with the price shown before anything is charged.

The meeting kit

The Meeting ballots tab's **Meeting kit** card has **Download meeting kit (PDF)** and **Download lists (CSV)**. The kit is built at the moment you download it, so print it right before the meeting. It contains:

- **Already voted.** Members with a ballot on file, online or on paper, who must not get an in-person ballot. It shows who voted, never how.
- **Unit already voted by a co-owner.** Only on elections where each unit votes once and a co-owner has already voted a member's unit.
- **Not yet voted: sign-in sheet.** One row per member who may receive one numbered ballot, with columns for the ballot number and a signature, and lines at the foot for ballots handed out, ballots collected, and who checked the sheet.
- **Two blank sign-in sheets** for attendees who are on neither list. They sign in and receive no ballot.
- **Instructions for the person running the meeting**: before, during and after the meeting.

At the meeting

1. Check each arriving member against the "Already voted" list. A member on it gets no ballot.
2. Hand each member on the "Not yet voted" list one numbered ballot. Write the ballot number beside their name and have them sign.
3. Someone on neither list signs the blank sheet and gets no ballot. A spoiled ballot is kept, marked "spoiled" beside the name, and the next number is handed out.
4. Collect every marked ballot. The kit says not to open, sort or count them at the meeting.
5. Enter each ballot on the Enter ballots screen while the election is still open, with **Received via** set to **In person (at the meeting)**. A blank ballot first asks who cast it (see the next sections). If the member already voted online, the screen says so and asks which ballot stands.

> SET THE CLOSE AFTER THE MEETING
>
> Paper and in-person ballots can be entered only while the election is open. Set the election's close time after the meeting, with time to enter the ballots, and use **Close online voting earlier at** to stop the web ballot when the meeting is called to order. The kit's instructions name that setting when no separate online cutoff is set.

What the printed ballot looks like

A mailed packet has up to four parts, in this order:

1. **The notice (page 1).** Your return address and the member's name and address sit at the top, placed for a double-window envelope, with "OFFICIAL ELECTION MAIL" on the right. Below them come your organization's name, the notice heading, the election title, "Dated" with the day the ballot was made, then

Called by, Purpose, the meeting date, time and place, your paragraphs and agenda. It ends with "Enclosed: your official absentee ballot", the ballot deadline in bold, the online voting hint, and a line of contact details beginning "Questions:".

2. **The ballot (page 2)**, shown below.
3. **Candidate statements (page 3)**, only if you added them: "Statements are printed as submitted; every candidate was offered the same space."
4. **Voter Identification and Certification**, only on a secret ballot. The member signs this page instead of the ballot: "Staff verify your certification, then separate it from your ballot before the ballot is opened."

8

LONGLEAF RIDGE HOMEOWNERS ASSOCIATION

OFFICIAL ABSENTEE BALLOT

1 Ballot No. **000002** Scan or enter the number

2026 Board of Directors Election
Issued to: Grace Okafor 2

Instructions 3

1. Mark your choice by completely filling in the box next to it. Use black or blue ink.
2. Do not mark more choices than allowed for a question: an overvoted question cannot be counted.
3. Sign and date the voter certification. Unsigned ballots cannot be counted.
4. Return the ballot in the enclosed envelope so it is RECEIVED by the deadline below.

Must be RECEIVED by 7:00 PM EDT on Friday, October 30, 2026. 4

1. Board of Directors (choose up to 2) 5

Vote for no more than 2.

- ☐ Janelle Brooks
- ☐ Rosa Delgado
- ☐ Kevin Tran

Voter Certification 6

I certify that I am the owner of record (or the authorized representative of the owner) of the unit(s) listed above and that I have not cast a ballot in this election by any other means.

If the unit is owned by a trust or entity, print your name and capacity.

Printed name: _____

Capacity (owner, trustee, officer, agent): _____

Property address / unit: _____

Signature: _____ Date: _____

RETURN YOUR BALLOT 7

Return in the enclosed envelope to:
Longleaf Ridge Homeowners Association
c/o Election Committee
PO Box 4412
Harlow Springs, NC 27599
Must be RECEIVED by 7:00 PM EDT on Friday, October 30, 2026.
Lost or spoiled ballot? Contact the administrator for a replacement; the original will be voided.
Questions or a replacement ballot: Priya Raman, Vice President · priya@longleafridge.example · (555) 555-0142

Members who received an online ballot may vote online instead. Only the first ballot received from each member is counted.

1. The ballot number and its QR code. Either one finds the ballot on the Enter ballots screen.
2. The member it was printed for. A secret ballot leaves this out.
3. Your instructions from Setup, numbered.
4. The deadline, in bold.
5. Each question with a box beside every choice, and its limit.
6. The voter certification lines you chose.
7. Where to send the ballot, the deadline again, and who to call for a replacement.

8 One of four black squares, one near each corner of every ballot page. They let a phone photo of the sheet be squared up.

FIGURE 12.6 Page 2 of Grace Okafor's packet as the sample packet PDF prints it, with the default instructions and certification.

- A long ballot continues on more pages, each headed with the ballot heading and "Ballot No. 000002 (continued)".
- Every page carries a footer with the ballot number, the election title and "Page 1 of 2". In a merged PDF every packet is padded to the same number of pages with pages reading "This page intentionally left blank".
- When vote.direct mails the packet on We mail them with a return envelope, the ballot page also prints your return address near its foot, under the line "Fold so this address shows through the envelope window".
- A question that accepts write-in candidates gets lines reading "Write-in:" under its choices.
- Every ballot page, the first and any continuation, has four small black squares, one near each corner. No other page of the packet has them. They let a phone photo of the sheet be found and squared up, so every box can be measured against that ballot's printed layout (see Photograph envelopes and ballots at the count). A ballot printed before the squares were added still works, but a person always decides it.

Enter a returned ballot

Open **Enter ballots** from the Paper ballots page or the card on the election page. The screen is built for a phone: you can photograph a sheet, scan its QR code, or type its number. A counter with a counting link sees the same screen, under the line "You are counting this election's ballots: find each one, check its marks and count it."

Ballots can be looked up at any time, but they can be counted only while the election is live. Before it opens, a yellow note says "This election is not live yet. Ballots can be looked up; counting opens when the election is live." After the close it says "This election is closed. Ballots can be looked up but no longer counted."

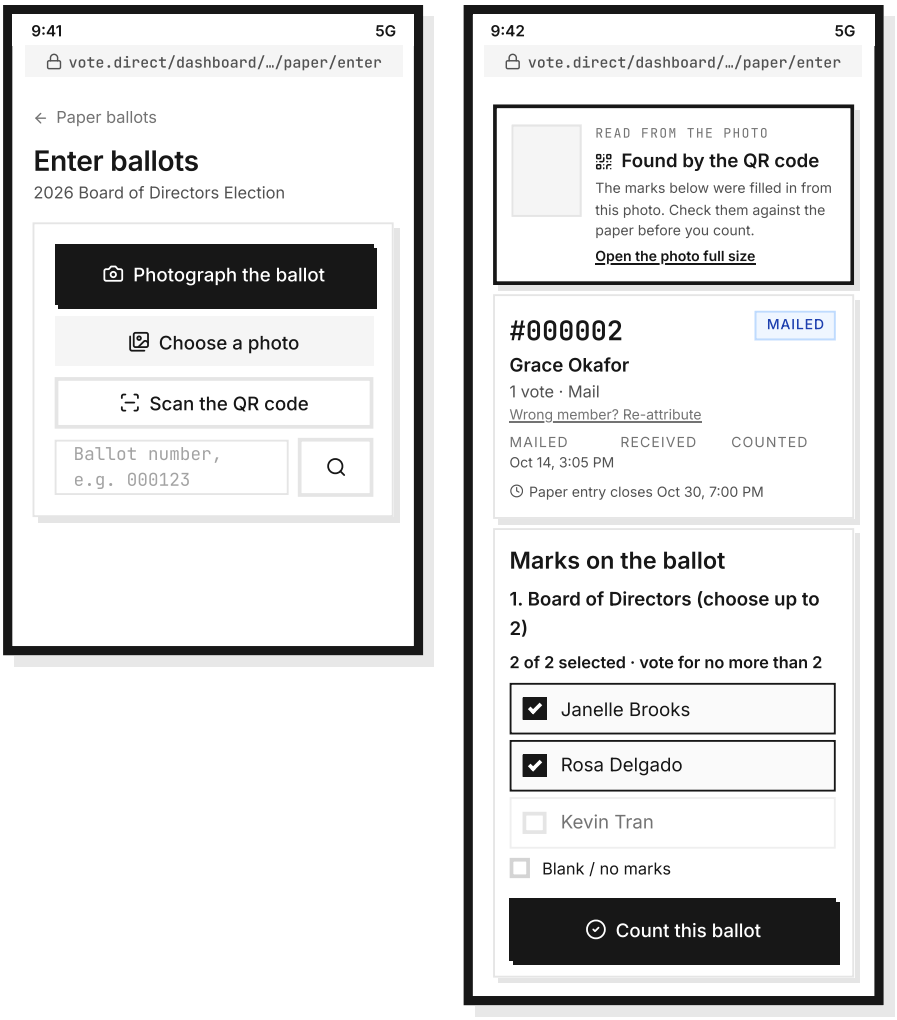


FIGURE 12.7 Left: the Enter ballots screen waiting for a ballot. Right: Grace Okafor's ballot after a photo of the sheet, with the marks the reader proposed already ticked. The Received and Photos cards, which sit between the ballot card and the marks, are left out here.

1. Find the ballot

- **Photograph the ballot** opens the camera; **Choose a photo** takes one you already have. The screen shows "Reading the ballot..." while it works.
- **Scan the QR code** opens a live camera view: "Point the camera at the QR code on the ballot". **Close** stops it.
- Or type the number printed under the QR code and press the search button. Leading zeros and # are optional.

If nothing matches, the screen says "No ballot with that number or code in this election." A QR code from something else reads "That QR code is not a Vote.Direct paper ballot."

2. Let the reader propose the marks

A photographed ballot is read automatically. The reader finds the ballot by its QR code, or by its printed number if the QR cannot be read, and proposes the marks in the form below. It never counts anything. A person checks the paper and presses **Count this ballot**.

- If the ballot was found by its printed number, tick **The sheet says Ballot No. 000002** after checking the number on the paper. Counting waits until you do.
- A question the reader was unsure of, or one with more marks than allowed, is left unmarked with a yellow note, for example "The reader was not sure about the marks here. Check this question against the sheet." Change its marks, or tick **Checked against the paper**. Until you do, a line beside the count button says which question is waiting.
- An overvoted question is never repaired: the note quotes the ballot's rule that marking more than the number allowed means the item is not counted. Tick **Blank / no marks**, or correct the marks if the reader misread them.
- A sheet from a different election reads "This sheet belongs to a different election. Keep it apart and count it under its own election."

3. Check the ballot card

The card shows the number, the member, the votes the ballot casts, its kind and status, and its mailed, received and counted times, with "Paper entry closes" and the close time. It warns you before you count:

- "This member already voted online on" a date. Counting will ask which ballot stands (see When a member votes twice).
- A ballot that cannot be counted says why, for example "This ballot has already been counted." or "This ballot is void and cannot be counted."
- **Wrong member? Re-attribute** lets you move an uncounted ballot to the right member.

4. Attribute a blank meeting ballot

A blank meeting ballot belongs to nobody until you say who cast it. A yellow box, **Who cast this ballot?**, says "Attribute this ballot to a member before counting". Type part of a name, a unit or an email under **Search by name, unit or email** and press **Link** beside the right member. Members who already voted are marked "already voted". If nobody matches, the person is not on the roster: add them through Add voters first, then search again. Their ballot cannot be counted until they are on it.

5. Record how it arrived

The **Received** card holds **Received on** (now, unless you change it), **Received via** (**Mail**, **Hand-delivered**, **In person (at the meeting)** or **Other**), the tick box **Signature present**, and **Notes**. Counting records all of this, so **Mark received** is optional. The first received date is kept. Later edits change the other details but not that date.

6. Add photos

The **Photos** card has two buttons, **Envelope (signature side)** and **Ballot**. Each opens the camera. Photos are kept with the ballot as evidence, and a sheet photographed for the reader counts as a ballot photo.

7. Enter the marks and count

Under **Marks on the ballot**, match each question to the paper. A multiple choice question shows how many are selected against its limit and stops you at the limit. Write-in names go in the **Write-in** boxes. Every question needs marks or **Blank / no marks**; otherwise the screen says "Every question needs marks or the “Blank / no marks” box ticked before this ballot can be counted." A question type that cannot be entered from paper reads "questions are not supported for paper entry yet: this question is recorded as blank."

Press **Count this ballot**. For a mailed ballot without **Signature present** ticked, or with no photos, a dialog asks first, for example **No signature recorded: count anyway?** It explains: "A mailed ballot is normally counted with the voter's signature confirmed and the envelope and ballot photographed. You can still count it, it is recorded without them." Press **Go back** to fix it, or **Count anyway**. Meeting ballots skip this check.

The screen then shows "Ballot #000002 counted" and how many votes were added to the tally, with **Photograph the next ballot**, **Next ballot** and **Scan next**.

Can't count this ballot?

Open the card **Can't count this ballot?** at the bottom. Under **Record it as**, pick one, type a **Reason**, and press **Record without counting**:

Choice	Status in the ledger
Late: received after the deadline	Late
Rejected: unsigned, unreadable or otherwise invalid	Rejected
Set aside: duplicate of another ballot	Set aside (duplicate)

None of these is final. To count such a ballot after all, open it, press **Mark received** to receive it again, and count it.

Photos members send in

If you turned on **Photo submission**, photos members take of their own ballots wait at the top of the screen as "self-scanned ballots waiting for review". **Review & enter** attaches the photo to the ballot and opens it for entry; **Reject** discards it. "A photo never counts by itself."

When a member votes twice

The rule is: the first ballot received counts. Every paper ballot is tied to a member's row on the roster. When you count it, vote.direct checks for an online ballot from the same member and for another counted paper ballot. If it finds one, counting stops and the screen asks which ballot stands.

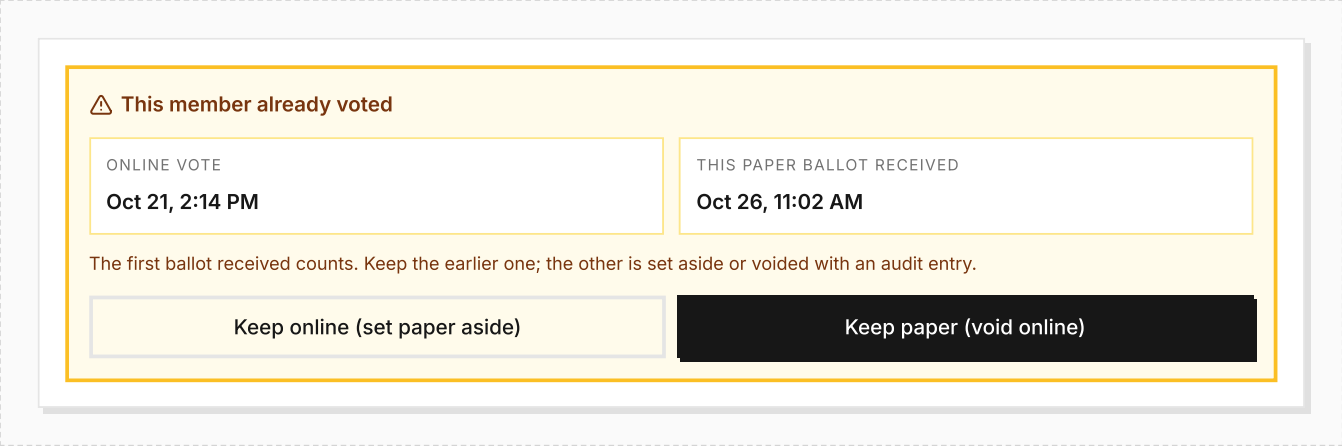


FIGURE 12.8 Harold Jensen voted online on October 21 and his mailed ballot arrived on October 26. The online vote came first, so Priya presses Keep online.

- **Keep online (set paper aside)**: the online vote stands and the paper ballot becomes **Set aside (duplicate)**.
- **Keep paper (void online)**: the online ballot is voided, never deleted, and the paper ballot is counted. If that member later tries to change their vote online, they are told "Your online ballot was superseded by your paper ballot under the election rules and cannot be changed online."
- If the earlier ballot is also on paper, only one choice is offered: set this ballot aside and keep the earlier one. If the earlier paper ballot is the wrong one, void it in the ledger first, then count this one.

The reverse is covered too. Once a paper ballot is counted, the member's online ballot will not take a second vote.

On an election where each unit votes once, a ballot counts for the units its member holds that nobody has voted yet. The card shows which, for example "Counts for unit 12 · unit 14 already voted by" a co-owner. When every unit is already voted, the ballot cannot count: record it under **Can’t count this ballot?** as a duplicate.

Receive envelopes with a phone

Whoever collects the returned envelopes logs each one with a receiving link, before anyone opens it. The link opens the scanner: one screen in the phone's browser, headed "Receiving ballot envelopes", with the election title and "Signed in as" the name you gave the link. No account or app is needed. The screen shows how many envelopes have been photographed and nothing about what they say: never a name, an address, a match, or a number to write on an envelope. Each photo is read behind the screen, for you.

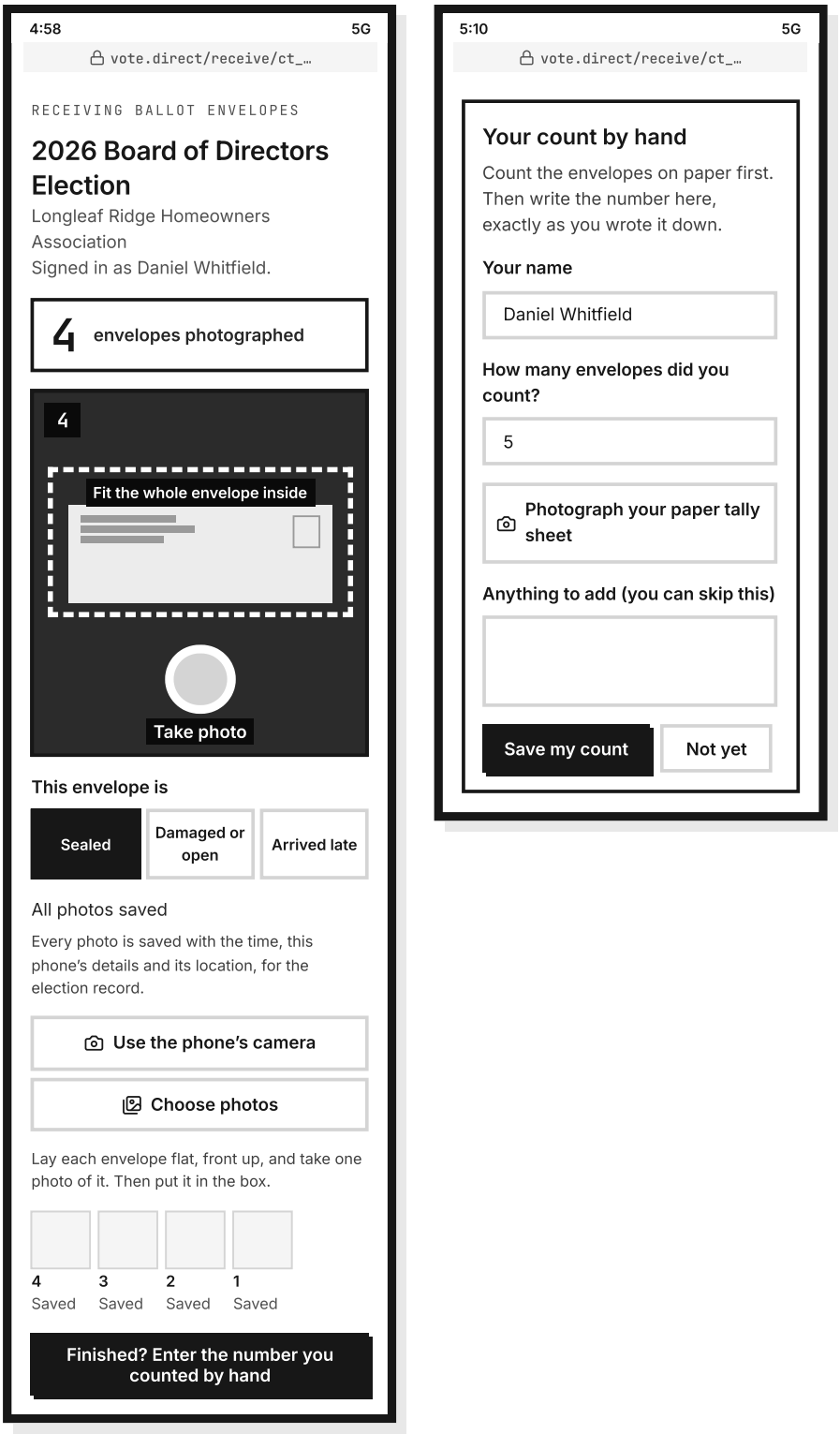


FIGURE 12.9 Left: the receiving link on the board secretary's phone after four envelopes, every photo saved. Right: the count by hand he types in at the end of the day. He counted 5, one more than he photographed, so the scanner then shows "Your count: 5. Photographed: 4." and asks him to check the box for an envelope that was not photographed.

1 Press **Start the camera** and allow the camera. The phone also asks once to share its location, and the screen says why: "Every photo is saved with the time, this phone's details and its location, for the election record." Photos are taken either way.

2. Under **This envelope is**, leave **Sealed**, or pick **Damaged or open** ("Torn, open or wet. Do not reseal it. Photograph it as it is.") or **Arrived late** ("Only for an envelope that came in after the last collection day. It stays sealed and is recorded as late."). The choice goes back to Sealed after each photo.
3. Lay the envelope flat, front up, inside the dashed frame, and press **Take photo**. Put the envelope in the box and take the next one. The count goes up at once, and "Photo 4 taken" shows with **Undo** for five seconds. Undo removes the photo before it is sent.
4. Keep going. Photos are sent in the background, and the line under those three buttons reads "All photos saved" once every one has arrived. With no signal it says how many are waiting. They are kept on the phone, even if the page is reloaded or closed, and sent when the signal is back.

- The count is the total for the election, so two phones logging the same post show the same number. A second line then says how many were taken on that phone.
- A photo that is too blurry or too dark is not kept, and the screen says so, for example "Too blurry. Hold still and take it again." After two in a row, the next one is kept anyway. Where the phone's browser can work its light, **Light on** sits in a corner of the viewfinder.
- If the camera cannot open inside the page, as in some apps' built-in browsers, the screen says what to do instead. **Use the phone's camera** takes a photo with the phone's own camera, and **Choose photos** sends photos from the phone's gallery, several at once. Both count like any other photo.

The count by hand

When the last envelope is in the box, count the envelopes by hand on paper. Then press **Finished? Enter the number you counted by hand**, type **Your name** and the number under **How many envelopes did you count?**, and press **Save my count**. A photo of the paper tally sheet and a note are optional. The scanner then sets the two numbers side by side, for example "Your count: 5. Photographed: 5." When they differ, it says by how much and what to look for: "Your count and the photos differ by 1. Check the box for an envelope that was not photographed." When there are more photos than your count, it asks you to count again and look for an envelope photographed twice. A saved count is never changed. To correct it, press **Enter a new count by hand**: the newest count is the one compared, and the earlier one stays on the record.

What happens behind the photos

Each photo is read a moment after it arrives. vote.direct reads the name and address in the envelope's return corner and matches the envelope to its home by name and address. A ballot number in the corner only breaks a tie. A house number that reads differently from your roster is never matched automatically, even when the name and street agree: that envelope waits for you, with that home as the first suggestion. A matched envelope marks its ballot received, with the photo attached. You follow the results in the Envelopes received card (see Counting links and receiving links):

- **No home matched, or more than one could.** The envelope waits for you to choose its ballot from the photo, without opening it.
- **Second envelope.** The home already sent one. The first one stands, and this one is flagged for the count.
- **Damaged or open, or late.** Flagged for a look even when it matched. A late envelope's ballot becomes Late: the association decides whether it counts, and to count it, receive it again on the Enter ballots screen.

A photo never counts a ballot. Counting happens when the envelope is opened and the ballot is entered.

Photograph envelopes and ballots at the count

At the count, the scanner photographs every envelope again before it is opened, then every ballot once it is out of its envelope: one photo each, as fast as the person can go. Behind the person holding the phone, two readers read each ballot photo. You then count the ballots both readers agree on in one step, and decide the rest one at a time. The Enter ballots screen still works for any single ballot.

- **A counting link** opens the Enter ballots screen. The button at its top, **Photograph every envelope and ballot**, opens the scanner at an address starting `vote.direct/scan/`, on the **Envelopes at the count** pass.
- **You** press **Open scans and reconciliation** on the **Returns & counting** tab, then **Open the scanner**.
- **A partner** whose sign-in may count presses **Photograph at the count** (see The partner who receives and counts).

Buttons at the top of the scanner pick the pass. Each pass has its own count and its own count by hand.

Pass	What to photograph	What the photo does
Envelopes as they arrive	Each envelope as it comes in, as on a receiving link	Marks its ballot received once it matches a home
Envelopes at the count	"Before opening anything, take one photo of the front of every envelope."	Changes nothing. It is compared with the envelopes logged on arrival, to show that every envelope that arrived reached the table.
Ballots	"Open one envelope at a time. Lay the ballot flat and take one photo of the whole page." The frame reads "Fit the whole page, with the four black corner squares showing".	Read twice, then waits for you on Scans and reconciliation. It counts nothing by itself.

On the Ballots pass, the count by hand also takes the totals for each choice from a paper tally sheet, if you kept one.

Each ballot photo is read twice, separately. The mark reader finds the four black corner squares (see What the printed ballot looks like), squares up the page and measures every box against that ballot's printed layout. A second reader reads the same photo on its own. A ballot is ready to count when both read the same marks, its QR code found it, nothing on it needs a check, and it was photographed once. Anything else waits for a person, such as a question with more marks than it allows. Neither reader ever counts a ballot. A ballot printed before the corner squares were added, or one whose questions run onto a second page, is read by the second reader alone, so a person always decides it.

Scans and reconciliation

Open it with **Open scans and reconciliation** on the **Returns & counting** tab. It opens for the same accounts as the Paper ballots page. A counting link, a receiving link or a partner never sees what a photo was read as. The top of the page links **Open the scanner** and **Counting and receiving links**, and gives one line per pass, such as "5 envelopes photographed". The three photo tabs name how many photos wait for a person, for example **Ballots (1)**.

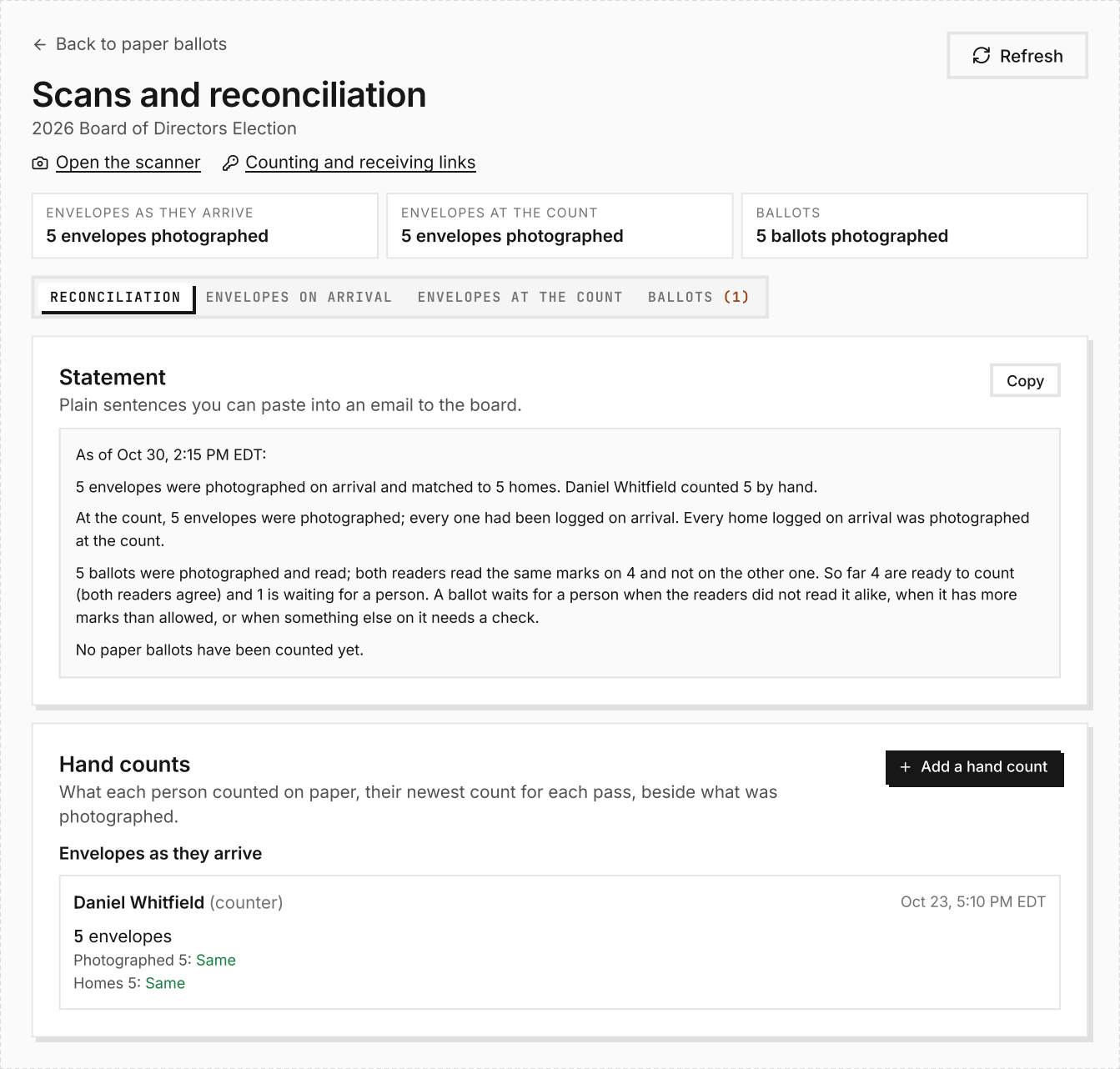


FIGURE 12.10 Scans and reconciliation on the day of Longleaf Ridge's count: five envelopes photographed on arrival and again at the count, and five ballots, one of them waiting for a person. The numbers and the tally of the marks follow the hand counts.

Tab	What it holds
Reconciliation	A statement for the board, the hand counts, the numbers for each pass, and the tally of the marks
Envelopes on arrival	Each envelope photographed on arrival, what was read from its return corner, and the home it matched. Decide an unmatched one here as in the Envelopes received card.
Envelopes at the count	Each envelope photographed at the count, and the home it belongs to. Nothing is decided here.

Tab	What it holds
Ballots	Each ballot photo, what each reader read question by question, and the count of the ballots both readers agree on

Under each photo, **Where and when it was taken** opens what was recorded with it: when it arrived, the phone's own clock, the phone, its location if it was shared, and whether the stored photo is the one the phone sent. On a secret ballot election, a ballot photo shows its number, never its owner's name.

- **Statement.** "Plain sentences you can paste into an email to the board." **Copy** copies them. Ballots are named by their printed number, never by owner, and where two numbers differ the statement says by how much.
- **Hand counts.** Each person's newest count for each pass beside what was photographed: **Same**, or for example **Differs by 1**. **Add a hand count** records yours, or one written on a counter's sheet: pick the pass, type **Counted by** and the number, add a photo of the sheet if you have one, and press **Record this count**.
- **The numbers.** One list per pass. For the envelopes: photographed, matched to a home, second envelopes and waiting for review, and at the count, any home logged on arrival but not photographed at the count, by ballot number. For the ballots: how many both readers agree on, are counted, are ready to count and are waiting for a person.
- **Tally of the marks.** For each choice, the marks both readers agreed on, what has been counted, and each person's totals by hand. It counts each paper ballot once; the results page adds the online ballots and applies vote weights.

Count the ballots both readers agree on

On the **Ballots** tab, a box says how many are ready, for example "Both readers read the same marks on 4 ballots, each found by its QR code with nothing to check." Press **Count the 4 ballots both readers agree on**, then **Yes, count them**. Each ballot is counted with the marks both readers read, the same way as on the Enter ballots screen, and only while the election is live. A ballot that cannot be counted is listed by number with the reason and left for you. A ballot from a member who has already voted is one of them: count that photo on its own to choose which ballot stands.

Every other photo is decided on its own. Press **Decide this ballot**, fill the marks in from **The mark reader** or **The vision model**, check them against the photo, and press **Count with these marks**. A question with more marks than it allows is not counted, by the printed rule, so leave it blank. **Set the ballot aside** records why it is not counted, and **Discard as a retake** drops an extra photo of a sheet.

The page a ballot's QR code opens

A member who scans the QR code on their own ballot sees a short page about that ballot. It never shows anything beyond what the sheet already says. If you scan your own election's ballot while signed in, you go straight to the Enter ballots screen instead.

Ballot status	Page title
Counted	"Your ballot was received and counted"

Ballot status	Page title
Received	"Your ballot was received", and "Nothing more to do."
Void or rejected	"This ballot is no longer valid", with a note to contact your organization for a replacement
Voting closed	"Voting has closed"
Anything else	"Your paper ballot", with the options you turned on in Setup

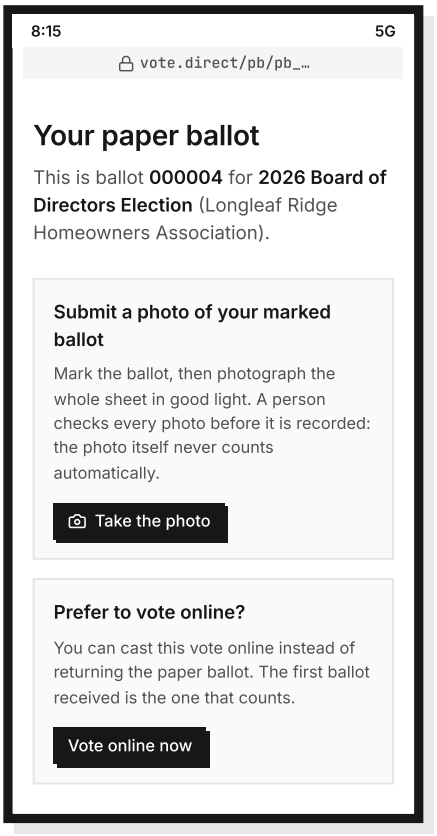


FIGURE 12.11 What Megan O'Connell sees when she scans her own ballot, with both QR options turned on in Setup.

- **Submit a photo of your marked ballot** appears only with **Photo submission** on. After **Take the photo**, the member reads "Photo received." and is told they can still mail or hand in the paper ballot, because it is the same ballot either way. The photo waits for review on your Enter ballots screen.
- **Prefer to vote online?** appears only with **Vote online instead** on, and only for a ballot linked to a member on the roster. **Vote online now** opens that member's online ballot.
- With both options off, the page says "Mark the ballot and return it as the packet instructs", followed by your deadline sentence if you typed one in Setup.

Deadlines and closing

Read this before you set dates for an election with paper ballots.

- **Received by, not postmarked by.** The default instructions and deadline say a ballot must be RECEIVED by the deadline. Nothing in vote.direct reads postmarks. If your rules accept a ballot by its postmark, judge each late envelope yourself: count it while the election is open, or record it with **Late: received after the deadline** and a reason.
- **The close time is the hard cutoff.** A paper ballot can be counted only while the election is live and before its close time. After the close, the count is refused with "Voting has closed: paper ballots can no longer be counted", and no new ballots, mailings, voids or replacements are possible. A printed ballot still out when the election closes can never be counted.
- **The online cutoff is separate. Close online voting earlier at** stops only the web ballot. Paper entry continues until the close.
- **Late is your call.** A receiver can log an envelope as **Arrived late**, and a counter can record a ballot as Late. vote.direct never decides lateness by itself, and you can reverse it by receiving the ballot again.

Warnings vote.direct sends

- **24 hours before the close.** If any printed ballot is not yet entered, vote.direct sends you an email and an alert in the app. The email's subject reads like "3 paper ballots still to enter before "2026 Board of Directors Election" closes". It says the ballots cannot be counted once the election closes, how many are already marked received, and to enter them or move the close date.
- **When paper goes quiet.** On an open election where no paper ballot has changed for three days and some are not entered, vote.direct sends a reminder of how many are left. It repeats at most once every 14 days.
- **When you close early.** The **Close voting early?** confirmation adds a line when paper ballots are not yet counted: "PAPER BALLOTS: 3 paper ballots have not been counted yet: enter them on the Paper ballots screen BEFORE closing, because a closed election can no longer accept a paper count."

After the close, the result certificate lists the ballots by channel, online, paper and in person, and notes any ballots set aside or voided under the election rules. See Close, results and the record.

CHAPTER 13

Inspectors and state rules

An inspector of elections is an independent person who reviews your election and certifies its result. This chapter shows how to appoint one, what they see and do, and what the Compliance card checks for your state.

IN THIS CHAPTER

- What an inspector of elections does
- The Inspector of elections card
- Appointing an inspector
- After you appoint
- What your inspector sees
- Certification and the results hold
- Emails you receive
- States and what the product checks
- The Compliance card

NOT LEGAL ADVICE

vote.direct is not a law firm. This chapter describes what the product does with the state rules it holds, and the statute names it shows on screen. This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it. Your governing documents may require more than any rule in the product.

What an inspector of elections does

In vote.direct, an inspector of elections is a person you appoint for one election who is not on your board, not a candidate, and not related to either. vote.direct emails them a private page. They do not need an account. From that page they:

- confirm that they are independent, before they can do anything else;
- review the voter list and each voter's voting power;
- review proxies, when the election uses proxy voting;
- confirm that voting closed;
- review the tally saved at close and certify it by typing their name;
- download the audit package, the file that holds the election record;
- add notes for the record.

An inspector cannot change the ballot, the voter list or the results, and cannot close the election. While an inspector is appointed, voters see no results after the election closes until the inspector certifies them. You always see the tally on the Results tab.

The product treats some states as requiring an inspector; see States and what the product checks. Anywhere else, an inspector is optional.

The Inspector of elections card

The **Inspector of elections** card is on the election page's **Settings** tab, below the Settings card. Emails about your inspector open the election page on this card. The person who created the election, and the workspace's owners and admins, can use it. Editors and viewers do not see it.

At the top of the card, a box says what the product holds for your election's state. Which one you see depends on the state and the election type chosen in the wizard (see States and what the product checks).

Box	Text (example)
Required (amber)	"California requires an independent inspector of elections (Cal. Civ. Code §5110). This election cannot be published until one is appointed."
Restricted (amber)	"Nevada restricts who may handle ballots (Nev. Rev. Stat. §116.31034). An independent inspector is strongly recommended."
Optional (gray)	"Optional here, but a neutral third party who confirms the roster and certifies the count is the simplest defence against a challenge."

Below the text, a link opens the product's guide to choosing an inspector, for example "How to choose an inspector of elections in California". The statute names come from the rules the product holds.

Until someone is appointed, the card offers three options side by side:

Appoint your own	"A notary, CPA, poll worker, or a member who is not on the board or the ballot." You name the person and vote.direct emails them.
Use Vote.Direct	Our team serves as the inspector. Offered only in some states. Elsewhere the option reads "Not available in California, see why." or "Not offered for this state yet, see why."
Help me find one	Sends our team a request for inspectors who serve your area.

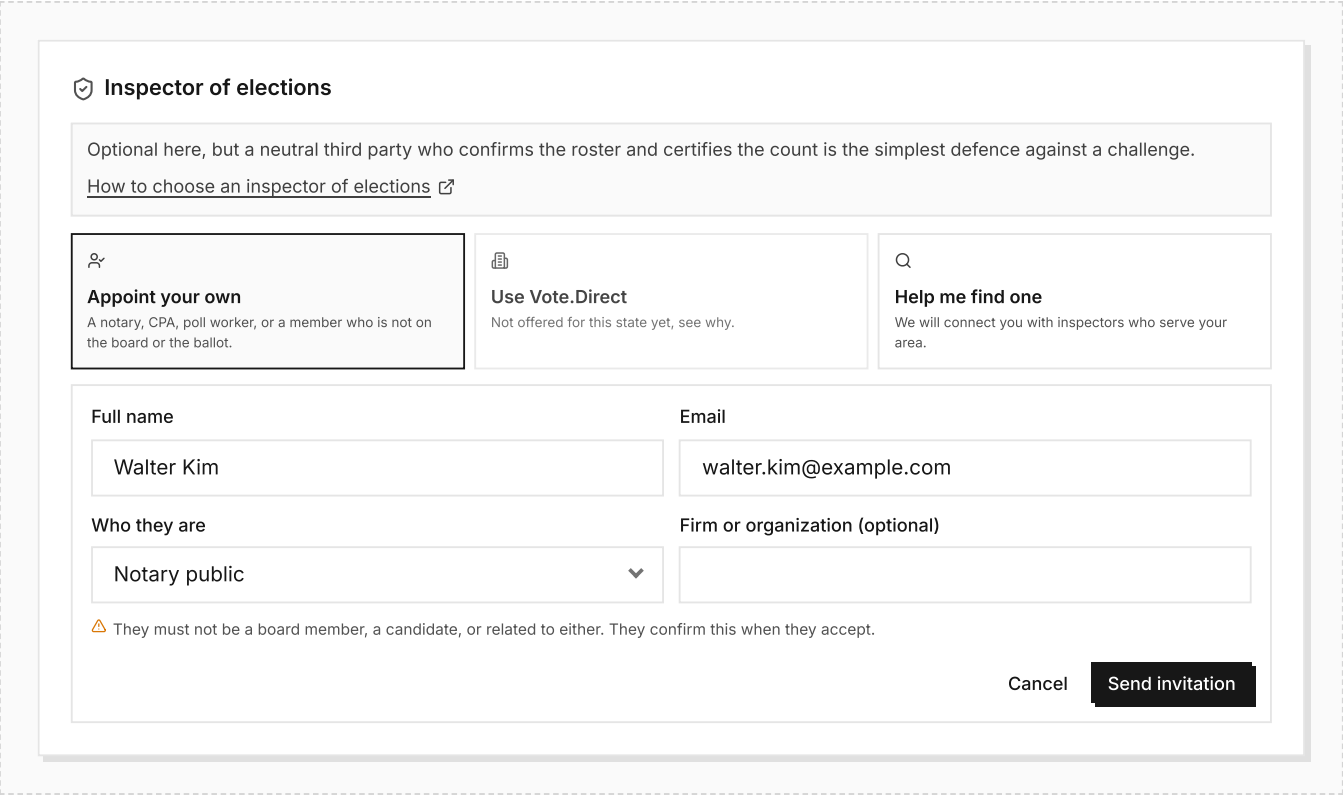


FIGURE 13.1 The Inspector of elections card on the board election, which has no state set, with Appoint your own open and Walter Kim's details filled in.

Appointing an inspector

You can appoint an inspector at any stage, even after voting closes. In a state where the product requires one, appoint before you publish: publishing is refused until someone is appointed. An appointment also holds results back from voters after close until the inspector certifies (see Certification and the results hold).

Appoint your own

1. On the **Settings** tab, find the **Inspector of elections** card and press **Appoint your own**. A short form opens below the options.
2. Fill in **Full name** and **Email**. Pick the person's role under **Who they are**, and add a firm under **Firm or organization (optional)** if they work for one.
3. Read the warning: "They must not be a board member, a candidate, or related to either. They confirm this when they accept." On a California election it adds that they must not be under paid contract to the association for anything other than serving as inspector, and cites Cal. Civ. Code §5110(b).
4. Press **Send invitation**. A message confirms "Inspector invited: Walter Kim was emailed a private inspector page. You'll be told when they accept." If the email could not be sent, the message says so; press **Resend invitation** on the card.

The California wording in step 3 comes from the rules the product holds.

The choices under **Who they are**:

- Certified public accountant
- Notary public
- County registrar volunteer poll worker
- Attorney
- Election / inspector-of-elections company
- Community association manager (not under contract to this association)
- Association member (not on the board or the ballot)
- Other independent third party

The person you appoint receives an email with the subject "You are asked to serve as inspector of elections: 2026 Board of Directors Election". It says who asked (for example "Priya Raman of Longleaf Ridge Homeowners Association"), gives the voting window, lists what they would do and what they will confirm, and has an **Open your inspector page** button. It asks them to keep the link private, because the link is their key to the page.

An election has one inspector at a time. To appoint someone else, revoke the current appointment first; otherwise you see "Walter Kim is already appointed. Revoke that appointment before appointing someone else."

Use Vote.Direct

In the states listed in States and what the product checks, our team can serve as your inspector. Press **Use Vote.Direct**. The panel explains, for your state, why the product can offer this, and cites the statute. Add anything we should know under **Anything we should know? (optional)**, for example the meeting date or who to coordinate with, and press **Appoint Vote.Direct**. A message confirms "Request sent". The card then shows "Vote.Direct Inspector Services" as your inspector, waiting for acceptance. When our team accepts, you receive the same acceptance email as for any inspector.

Where the product does not offer this, the panel explains why and offers **Appoint your own instead**. California is never offered: the panel explains that the state's statute bars anyone under contract to the association for paid services other than serving as inspector, and your association pays vote.direct for the voting platform. It is also not offered for an election with no state set, or in a state where the product has not confirmed that a paid platform may serve. This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

Help me find one

Press **Help me find one**, add details under **Notes (optional)** (for example when the meeting is, roughly how many members, and any deadline), and press **Ask us to help**. The request goes to our team, and the card notes that you asked. You can still appoint someone yourself at any time.

After you appoint

Once someone is appointed, the card becomes a status panel. It shows the inspector's name and role (for example "Walter Kim · Notary public"), their email, and a status line:

Status line	Meaning
Invited, waiting for acceptance · invited Oct 13, 10:05 AM	The invitation was sent. The inspector has not accepted yet.
Accepted, serving · since Oct 14, 4:05 PM	The inspector confirmed their independence and can act.
Results certified · Oct 31, 11:20 AM	The inspector signed the certification. Their statement appears below the checklist.

- **Resend invitation** emails the inspector a fresh link. The old link stops working. A message confirms "Invitation resent".
- **Revoke** ends the appointment. The dialog "Revoke this appointment?" explains: "The inspector loses access to their page and you will need to appoint someone else before results can be certified." Press **Revoke**, and a message confirms "Appointment revoked".
- Both buttons disappear once the inspector has certified.
- If the inspector declines, or you revoke the appointment, the card goes back to the three options, so you can appoint someone else, for example Denise Carter.

Below the status, a checklist follows the inspector's duties. Each line gets a check mark and a date as the inspector records it on their page.

Duty	What the inspector does
Confirm the eligible-voter roster and voting power	Reviews who is entitled to vote and how many votes or how much weight each has. Quorum and results are measured against this.
Review proxies	Checks that each proxy comes from a verified member and is within the holder limit. Listed only when the election uses proxy voting.
Determine when polls close	Voting closes automatically at the scheduled time. The inspector confirms the close.
Tabulate and certify the results	Reviews the saved tally and its integrity hash, then signs the certification.
Take custody of the record	Downloads the audit package (voter list, tally, audit log and their own log) to keep for as long as your records must be kept.

While certification is pending, the card notes: "Voters see results only after the inspector certifies them. You can always see the tally."

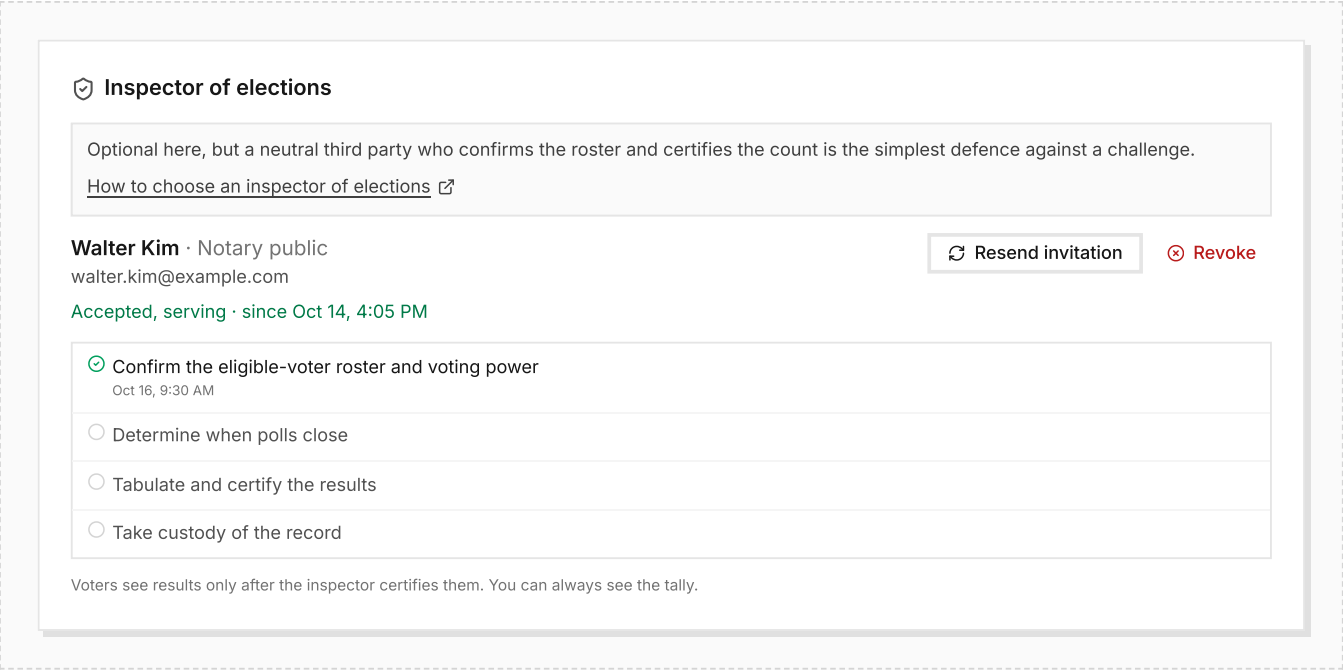


FIGURE 13.2 The card after Walter Kim accepted. He has confirmed the voter list; the other duties follow during and after voting. The board election does not use proxies, so that duty is not listed.

What your inspector sees

Your inspector works from a private page at an address that starts with `vote.direct/inspector/`, opened from the button in their email. The page has no menus and needs no account. Its header names the election, your association, whether voting is open, and the closing time. It also says "You are Walter Kim, Notary public." with their current status, and links to a guide titled "What an inspector does".

Accepting the appointment

The first time, the page asks them to accept: "An inspector of elections must be independent. Confirm each statement to accept. Your confirmation is recorded with the election's audit trail." They tick each statement:

- I am not a member of the association's board of directors.
- I am not a candidate in this election and I am not the subject of this vote.
- I am not related to a board member or a candidate.
- I will perform the inspector's duties impartially and in good faith.

On a California election there is a fifth statement, that they are not employed by or under contract to the association for any paid services other than serving as inspector. When every box is ticked, they press **I accept and confirm my independence**, and the page confirms "Thank you. You are now the inspector of record. The organizer has been notified." If they cannot serve, they press **I cannot serve**, can add a reason under "Why can't you serve? (optional, shared with the organizer)", and press **Decline the appointment**.

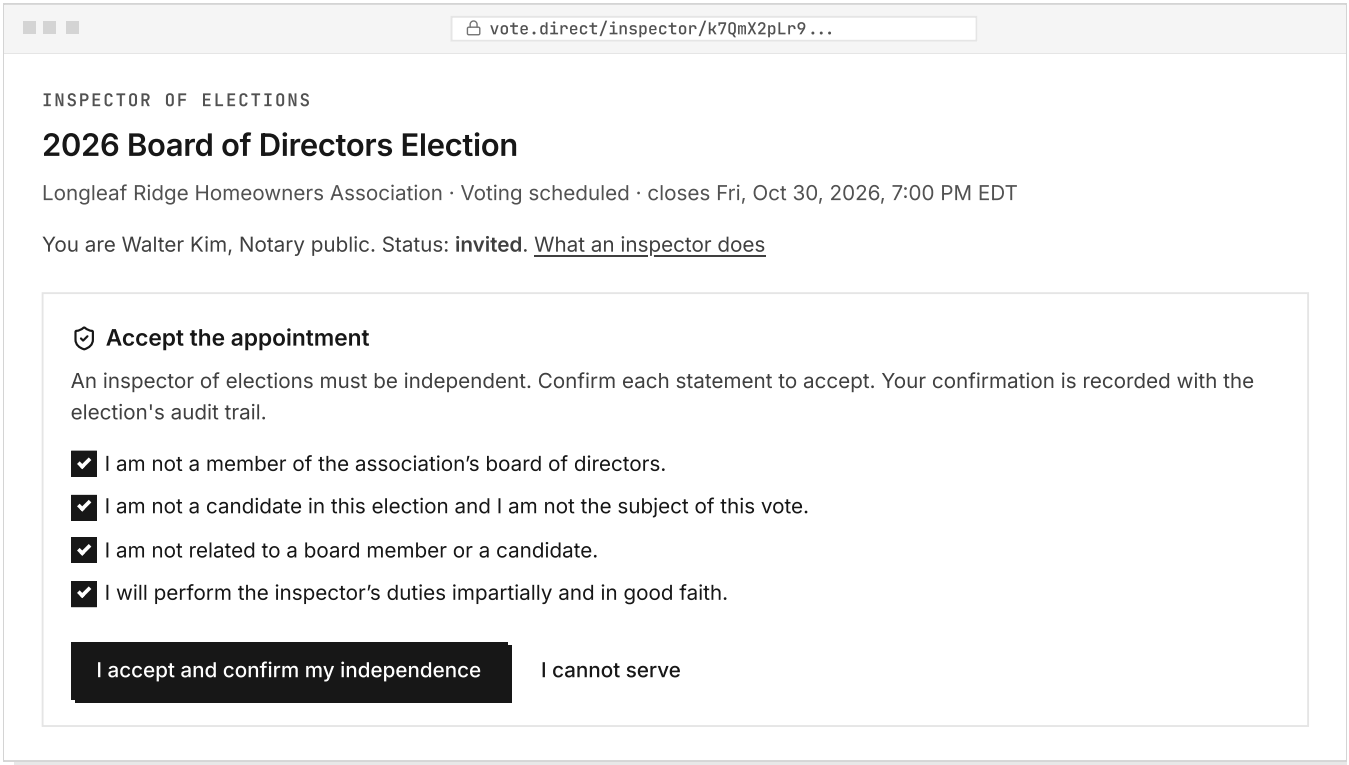


FIGURE 13.3 Walter Kim's inspector page before he accepts. The accept button works only once every statement is ticked.

The inspector's checklist

After accepting, the page shows the checklist, one section per duty, in this order:

Eligible-voter roster and voting power	Counts such as "212 eligible · 131 verified · 131 voted", the note "The roster of members entitled to vote, as it stands now.", and a table with Name, Email, Unit, Status and Weight. Email addresses are partly hidden: only the first letter and the domain show. The inspector presses **I have reviewed the roster**.
Proxies	Only with proxy voting: active, used and revoked counts, the limit per holder, and a table with Member, Holder, Status and Assigned. The inspector presses **I have reviewed the proxies**.
Close of polls	Before close: the closing time. After close: when voting closed, "The tally is frozen with an integrity hash.", and the button **I confirm the polls closed**.
Tabulation and certification	Before close: "The tally appears here once voting closes. Ballot contents are never shown while voting is open." After close: the number of ballots, eligible voters and whether quorum was met, each question with its counts and winners, the integrity hash, and the certification box (next section).
Custody of the record	After close, **Download audit package (JSON)**: the configuration, the audit log, the saved tally, proxy records and the inspector's own log, with a package hash. Before close: "Available once voting has closed and the tally is frozen."
Notes for the record	A box for "a challenge you heard, a ruling you made, an observation", with **Add note**. Notes are timestamped and included in the audit package.

The inspector receives two more emails from vote.direct: at close, "Ready for your certification: 2026 Board of Directors Election", with a **Review and certify** button and a fresh link to the page; and after they certify, a copy of the certificate. The audit package they download is the file anyone can check at `vote.direct/verify` (see Checking a record at vote.direct/verify).

Certification and the results hold

Your inspector can certify once voting has closed and the tally is saved, and only after accepting the appointment. An inspector who had not yet accepted can open the link in their ready-to-certify email, accept, and certify in one sitting. The certification box shows the statement they are about to sign. With the sample election it reads:

> “I, Walter Kim, Notary public, serving as inspector of elections for Longleaf Ridge Homeowners Association, certify that I reviewed the eligible-voter roster (212 eligible), the ballots received (171) and the tabulation for “2026 Board of Directors Election”, and that the results reported are the results as tabulated. Quorum was met. The tabulated results carry integrity hash 9b1e4c7a…”

The statement fills in the inspector's name and role, your association, the number of eligible voters and ballots, whether quorum was met, and the integrity hash. The inspector types their full name in **Type your full name to sign** and presses **Sign and certify**.

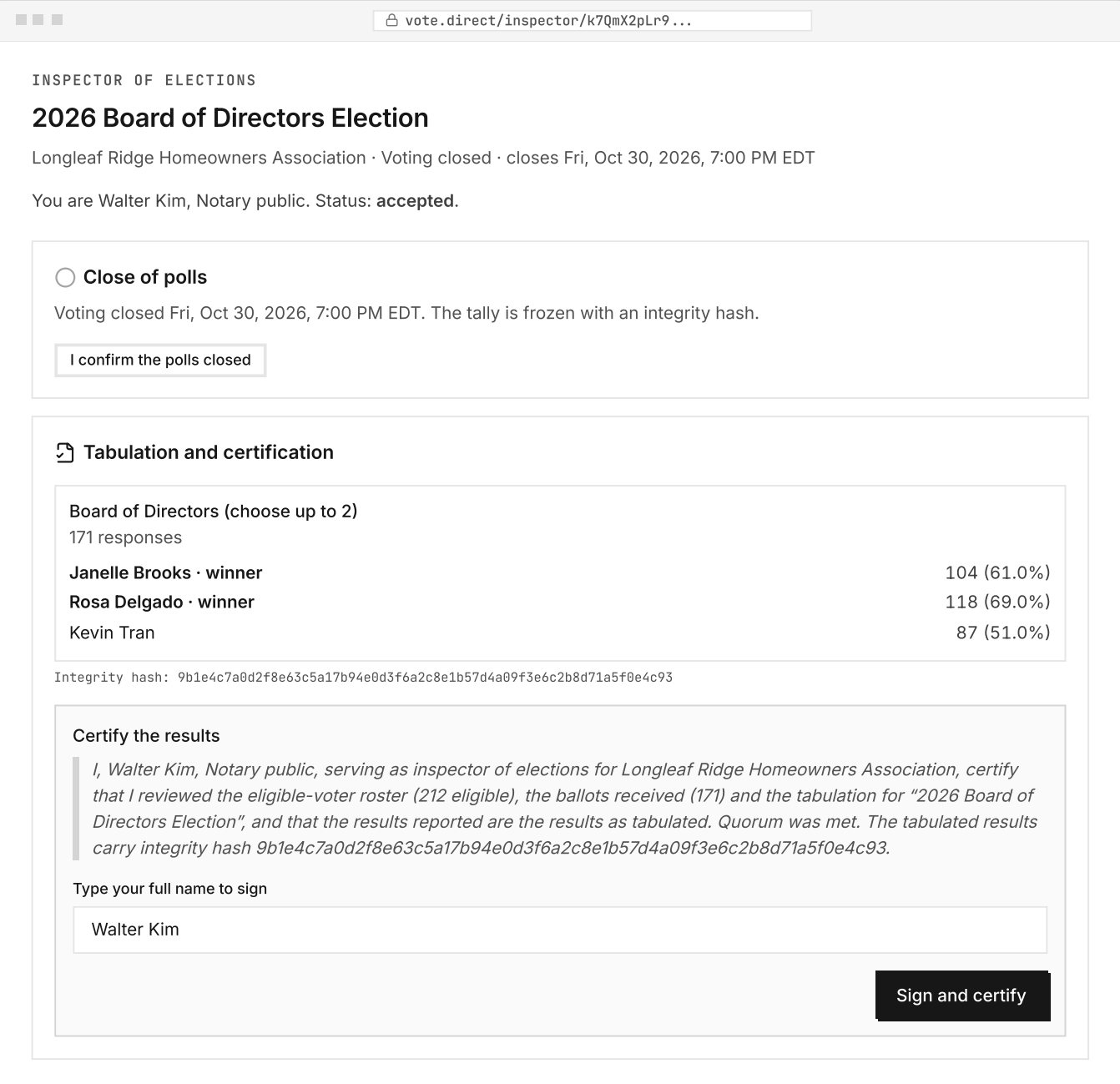


FIGURE 13.4 The inspector page after close, with the roster section above it left out. Walter Kim reviews the tally and its integrity hash, reads the statement and signs it by typing his name.

When the inspector signs:

- **The hold lifts.** If your election shows results after close, voters can now see them.
- **The certificate changes.** Its Inspector of elections section shows "Results certified by the inspector of elections" with the date, the signed statement, and "Signed: Walter Kim". See The certificate of results.
- **You are emailed.** You receive "Results certified by your inspector" and, separately, "Certified results" with the certificate attached. The inspector receives the certificate too.
- **The record is anchored.** The certification is stored with the audit log's chain head at that moment, and the audit log records "Inspector Certified Results".

How the results hold works

- The hold starts when you appoint an inspector, even before they accept.
- It applies only after the election closes. If your election shows a running tally while voting is open, voters still see it during voting.
- It ends when the inspector certifies, or when the appointment ends because you revoke it or the inspector declines. If the appointment ends after close, the results are released without an independent certification: you receive an email headed "Results released without inspector certification", with the certificate, which states that no independent certification is on record. You can appoint another inspector, who can still review the saved tally and certify it.
- If voting closes while the inspector has not accepted, vote.direct emails them the link again and emails you "Action needed". The results stay held until the inspector certifies, or until you revoke the appointment.

Emails you receive

These emails come from vote.direct and open the inspector card on the election page's Settings tab.

Subject	When	Button
Walter Kim accepted as inspector of elections: 2026 Board of Directors Election	The inspector accepts.	Open the election
Walter Kim declined to serve as inspector: 2026 Board of Directors Election	The inspector declines. Includes their reason, if they gave one.	Appoint another inspector
Action needed: your inspector has not accepted, 2026 Board of Directors Election	Voting closed and the inspector has not accepted.	Open the election
Results certified by your inspector: 2026 Board of Directors Election	The inspector certifies.	View results and certificate
Certified results: 2026 Board of Directors Election	At the same time, with the certificate attached as a PDF.	None
Results released without inspector certification: 2026 Board of Directors Election	The appointment ended after close without a certification.	Open the election
Results: 2026 Board of Directors Election (no inspector certification)	At the same time, with the certificate attached.	None

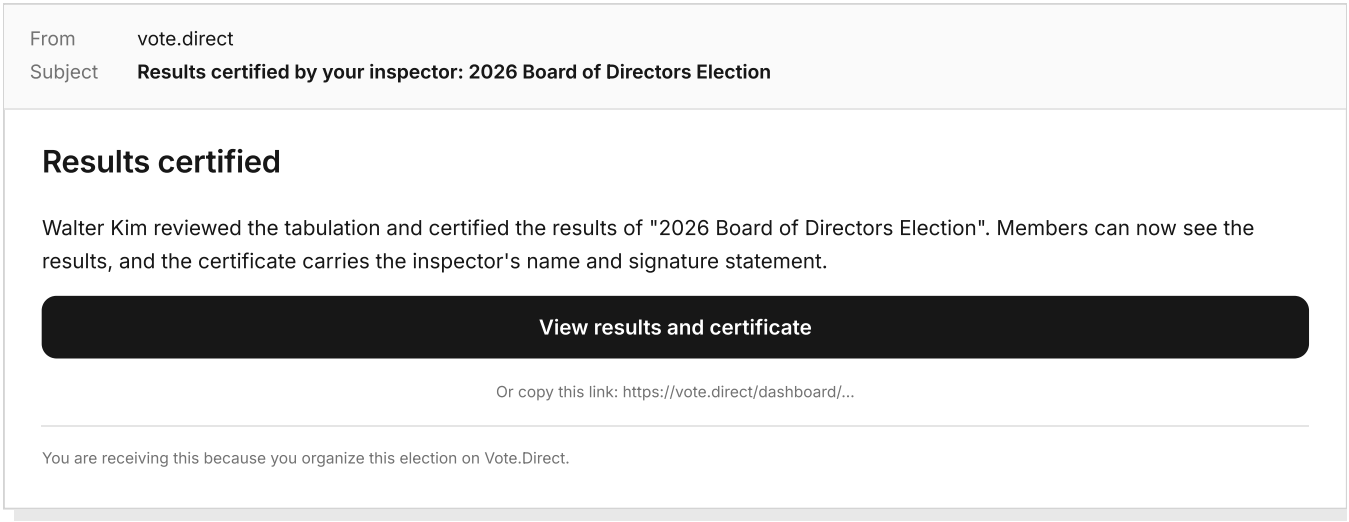


FIGURE 13.5 The email you receive when Walter Kim certifies. A second email, "Certified results", carries the certificate as a PDF.

States and what the product checks

The product checks your election against the rules it holds for one state, the one you pick in the wizard. This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

You pick the state on the wizard's **Schedule** step, in the **Compliance** section ("Select your state to check HOA election compliance requirements"). The choices are **No state selected (skip compliance check)**, California, Florida, Texas, Colorado, Arizona and Nevada. Once you pick a state, two more choices appear:

- **Community type**: **Not specified**, **HOA (Homeowners Association)** or **Condominium Association**.
- **Election type**: **Not specified**, **Board Election**, **Budget Approval**, **Bylaw Amendment**, **Resolution** or **Other**.

Some rules apply only to one community type or one election type, so choose both if they apply to you. The state is set only in the wizard: the election page has no field to change it. If you skip it, there is no Compliance card, and the inspector card treats an inspector as optional.

State	Inspector rule the product applies	Vote.Direct as inspector
California	Required for every election. Publishing is refused until an inspector is appointed.	Not available
Colorado	Required when the election type is Board Election. Publishing is refused until an inspector is appointed.	Available
Nevada	For board elections: board members and candidates may not handle ballots before the count. An inspector is strongly recommended.	Available
Florida	None. An inspector is optional.	Available
Texas	None. An inspector is optional.	Available for HOAs. Not offered when the community type is Condominium Association.

State	Inspector rule the product applies	Vote.Direct as inspector
Arizona	None. An inspector is optional.	Available
No state selected	None. An inspector is optional.	Not offered

When an inspector is required, publishing is refused with a message such as "California requires an independent inspector of elections (Cal. Civ. Code §5110). Your draft is saved: appoint one from the election page (Inspector of elections), then publish." Save the election as a draft, appoint the inspector on its Settings tab, then publish. An invitation that has not been accepted yet counts as an appointment for publishing.

The product's rules also mark Maryland board elections as requiring an independent party, with Vote.Direct able to serve, but Maryland is not in the wizard's list of states. If your election is in Maryland, contact us before you build it.

The Compliance card

When your election has a state, the Settings tab shows the **Compliance** card below the inspector card. The product checks your settings against the rules it holds for your state, community type and election type: notice and how long voting stays open, quorum, proxies, ballot secrecy, the inspector, conditions for electronic voting, record retention and voter eligibility.

The card is titled with the state, for example "California Compliance". It shows one colored bar. Press the bar to see every item behind it.

Bar	What it means
Red: "1 violation: must fix before publishing"	A setting conflicts with a rule the product treats as required. Publishing is refused until you fix it.
Amber: "2 advisory notices"	Things to confirm or keep in mind. They do not block publishing.
Green: "Compliant with California requirements"	Your settings passed every check the product holds for that state. It is not a legal finding that your election complies with the law.

Opened, the card lists each violation with what the rule asks, your current setting and the statute citation; each advisory with its recommendation, your current setting and the citation; and each check that passed, with a check mark. If no check has run yet, the card reads "compliance check pending" with "Compliance will be checked when you publish this vote."

- **Violations block publishing.** The refusal names each fix and its statute: "Fix before publishing: … Your draft is saved. The Compliance card on the election's Settings tab has the details." For example, for a California board election the product checks that voting stays open at least 30 days after ballots go out.
- **Advisories do not block.** Many cover things only you can confirm, such as when your notice of the election went out, which happens outside vote.direct.
- **The check runs again each time you open the election page** while the election is a draft, scheduled or live, using its current settings and the rules as they stand. A closed election keeps the result it had.

Two advisories matter after the election closes:

- For a California board election: "Report the tabulated results to members within 15 days of the count". The card notes that the platform cannot send this for you.
- In states where the product holds a retention rule, such as California: "Election records must be retained for 1 year(s)". Keep your election records for at least that long.

> GOOD TO KNOW
>
> The Compliance card shows statute names but carries no disclaimer of its own. Treat it as a checklist for your board's review, alongside your governing documents. This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

CHAPTER 14

Managed elections

vote.direct can run an election for your board, or part of one, as a paid service. This chapter explains what a managed election covers, what stays with your board, and how to ask for one.

IN THIS CHAPTER

- What a managed election is
- The four services
- Lead time
- In-person elections: paused
- How to start
- When vote.direct staff work in your account
- The partner who receives and counts

What a managed election is

A managed election is one where vote.direct does the work of running it for you. You arrange it with vote.direct; it is not a setting you switch on in your account. The full description is at vote.direct/managed-elections.

That page puts it in one line: "A managed election moves work off your board, not responsibility." Here is the split it publishes, task by task.

Task	Who does it
Ballot build	vote.direct
Roster load and dedupe	vote.direct
Notice drafting and send	vote.direct
Reminder cadence	vote.direct
Voter support inbox	vote.direct
Quorum monitoring	vote.direct
Close and tally	vote.direct
Result certificate and audit package	vote.direct
Paper packets (optional)	vote.direct
Inspector of elections (optional)	Either vote.direct or your board
Nominations and candidate statements	Your board
Legal review	Your board
Adopting election rules	Your board

The page adds: "A managed election does not make the vote legally binding. Your notice, your governing documents, your inspector where one is required and your counsel decide that." Whether vote.direct can serve as your inspector of elections depends on your state; see Inspectors and state rules. This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

> GOOD TO KNOW
>
> Scope and price are agreed in writing with vote.direct before any work starts. The published descriptions in this chapter are the starting point for that conversation, not the agreement itself.

The four services

vote.direct publishes four managed services. The first hands you an election ready to open; the other three run it for you, two of them with an addition.

Service	What it covers
Setup & Launch	"We build the ballot, load the roster, write and send the notices, and hand you a live election." Your board runs the election from the moment it opens.
Full Managed Election	"Everything in Setup & Launch, then we run it: reminders, quorum, voter support, close, tally, certificate." The starting price covers a digital election: email and text ballots, no mailed packets.
Managed + Mailed Packets	A full managed election where the members who need paper get a printed packet with a postage-paid return envelope, and their returned ballots join the same tally as the online votes.
Managed + Inspector of Elections	A full managed election where vote.direct also serves as your inspector of elections, in the states it lists. The inspector confirms the roster before ballots go out, oversees the count, and signs the certification.

Each service has a published starting price for an election of up to 100 voters. A larger roster, up to 5,000 voters, adds a published price per voter that falls as the election grows, so the instant quote and the panel in the app show the price for your exact roster; above 5,000 voters the price is a custom quote. Mailed packets are priced per packet, on the packets actually mailed, and an in-person count is quoted on top. A full managed election can also add a phone line that answers your voters' calls while voting is open, priced per voter. The prices are on vote.direct/managed-elections and in the instant quote (see How to start).

Mailed packets on a managed election

- The packet's price covers domestic US mail both ways for a packet of up to 4 pages: the packet goes out, and its return envelope already has the postage paid, so the member does not buy a stamp.
- The return envelope is addressed wherever you designate: your inspector, your management office, or vote.direct's neutral election address, a mail scanning location. Returns that reach it are tabulated by vote.direct remotely. Returns that reach you are entered by your board on the Enter ballots screen, one ballot at a time with a photo of each (see Enter a returned ballot).
- A mailed ballot counts when it reaches the return address by the close date: received by, not postmarked by.

- Every page of a managed packet carries the footer line "Administered by Vote.Direct, Independent Election Administrator".

The inspector service

The managed elections page lists where vote.direct may be appointed inspector of elections: Colorado, Nevada, Florida, Texas, Arizona and Maryland. In Texas it covers homeowners associations only, not condominiums. It is not offered in California, and for now it is offered only where neither the vote nor the count happens in person. You may appoint your own inspector anywhere. In the app, this service is offered only for an election whose state and community type qualify. This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

Lead time

vote.direct asks for 10 days before ballots open. That is its own working time, not the notice your members must receive. If your governing documents call for a longer notice, the schedule starts earlier. Mailed packets need more than 10 days, because printing and mail delivery set that date. The managed elections page shows the steps of those 10 days, from kickoff to the day ballots open.

To start, vote.direct needs four things from you: your roster, the call for the vote, the ballot content, and the rules that govern it, such as the quorum threshold, the voting window and who is eligible.

In-person elections: paused

Managed elections that need vote.direct staff physically present, such as an in-person vote or count, are paused for now. Managed digital elections remain available, and so does paper: mailed ballots returned to vote.direct's mail scanning address, which vote.direct tabulates remotely, and the meeting ballots your team prints, hands out at its own meeting and scans in (see Ballots at a meeting). The page at vote.direct/in-person-elections says the same.

Your board still supplies the candidates, the ballot wording and the governing rules. Nominations, decisions about election rules and legal review stay with your board and counsel. One election can combine online, mailed and in-person ballots; accepted ballots from each go into the same tally.

How to start

Instant quote	At vote.direct/quote, under "Get an instant quote.", fill in three short parts: **01 / YOUR ELECTION**, **02 / HOW WE CAN HELP** and **03 / SEND YOUR PDF**. Press **Email my PDF quote**. You see a preliminary estimate and receive it as a PDF to share with your board. "No payment or commitment. Final price and approval follow team review."
A call	At vote.direct/book, pick a time for a 15-minute call.
In the app	The panel described below, on the wizard's Voters step and on a draft election's page.

In the app, a one-line panel appears once your roster has 100 or more voters, or as soon as anyone on it is set to **Paper by mail**. An association's election shows it at any size, including before it has a voter list: one whose title or organization name says it is a homeowners association, a condominium, a co-op or a similar community. It sits under the price on the wizard's Voters step, and at the bottom of the checklist card on a draft election's page. Collapsed, it reads like "Rather have us run it with you?" followed by the services that apply. Press **See options** to open it.

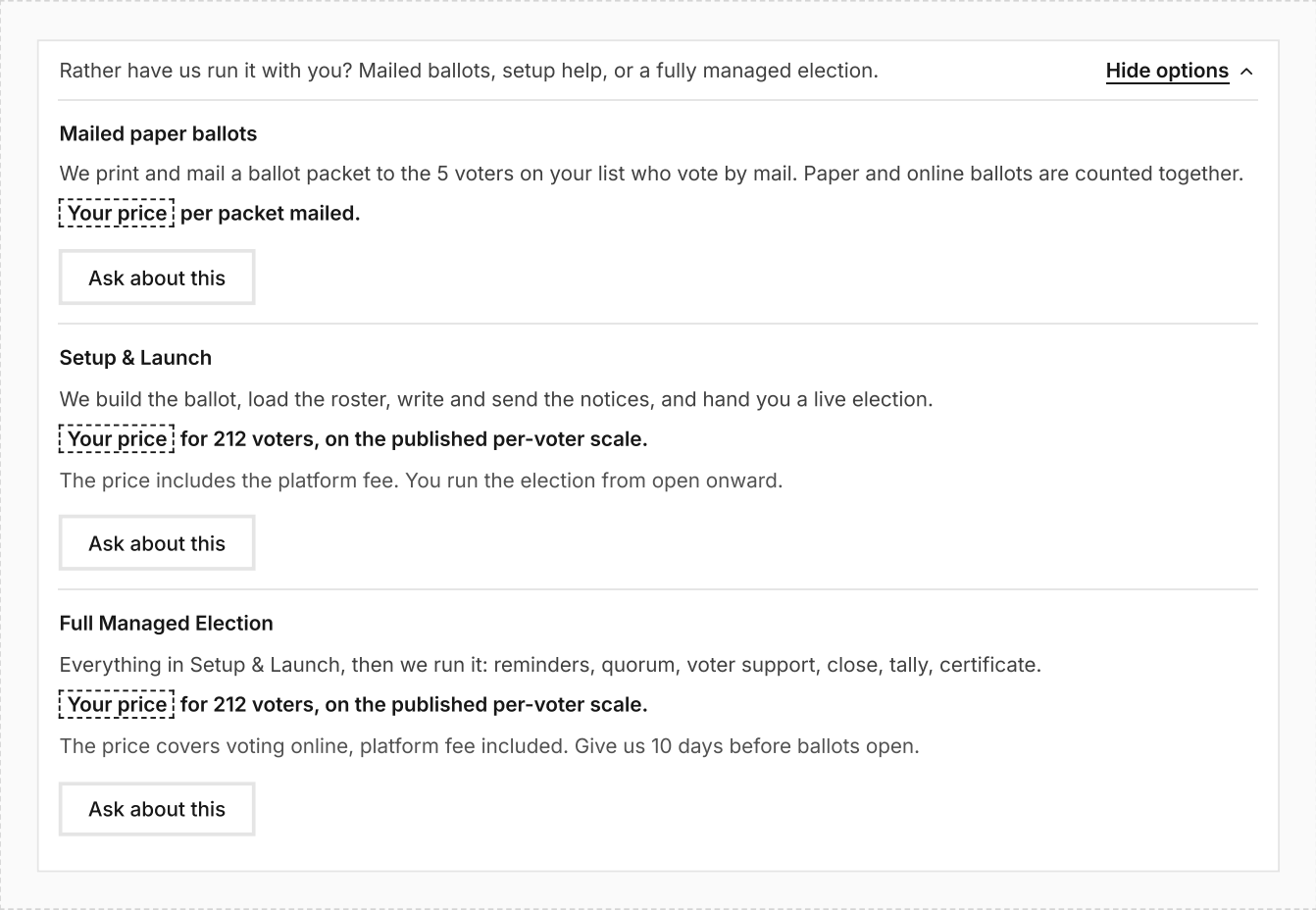


FIGURE 14.1 The services panel opened on Longleaf Ridge's draft: 212 voters, 5 of them by mail. The published prices appear where the figure shows Your price; the panel ends with a phone number to call or text.

Each row names the service, what it covers and its price, with an **Ask about this** button. Pressing it sends your request to vote.direct's team, and the button is replaced by a line confirming it was sent. The inspector row appears only when your election's state and community type qualify. The panel does not appear on an election vote.direct already runs as a managed engagement.

The Paper ballots page offers the same route. Under its first question, **See managed elections** opens the managed elections page (see Choose who handles the paper).

When vote.direct staff work in your account

Some engagements are done inside your own account, on your own election. vote.direct staff are then given access to that one election for a limited time, either to view it or to manage it. You are told twice:

- By email, with the subject "Support access to "2026 Board of Directors Election"". It names who has access, until when, and why.
- On the election page, in a yellow banner, for as long as the access lasts.

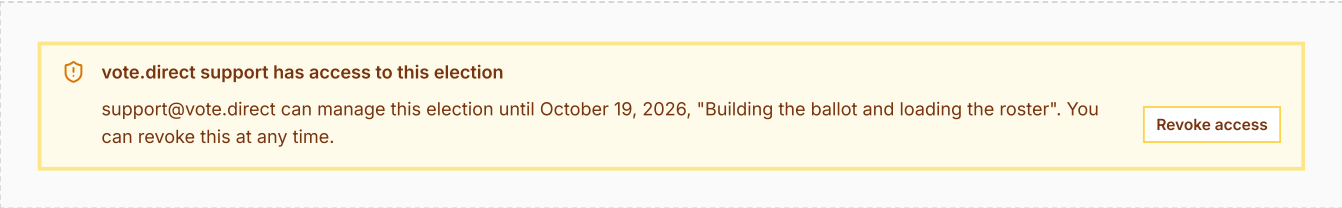


FIGURE 14.2 The banner on the election page while vote.direct staff have access. Each line names who, what they can do, until when, and the reason.

Press **Revoke access** to end it. It takes effect immediately, and the banner disappears when no access is left.

The partner who receives and counts

On a managed election with mailed packets, vote.direct may give an outside partner, such as the staff of a mail center or a count team, a sign-in for that one job. The partner signs in at `vote.direct/partner` with a 16-character code shown as `XXXX-XXXX-XXXX-XXXX`, or opens the link vote.direct sent. There is no account or password. The sign-in shows only that job's elections, allows only the work vote.direct granted, and ends on a set date.

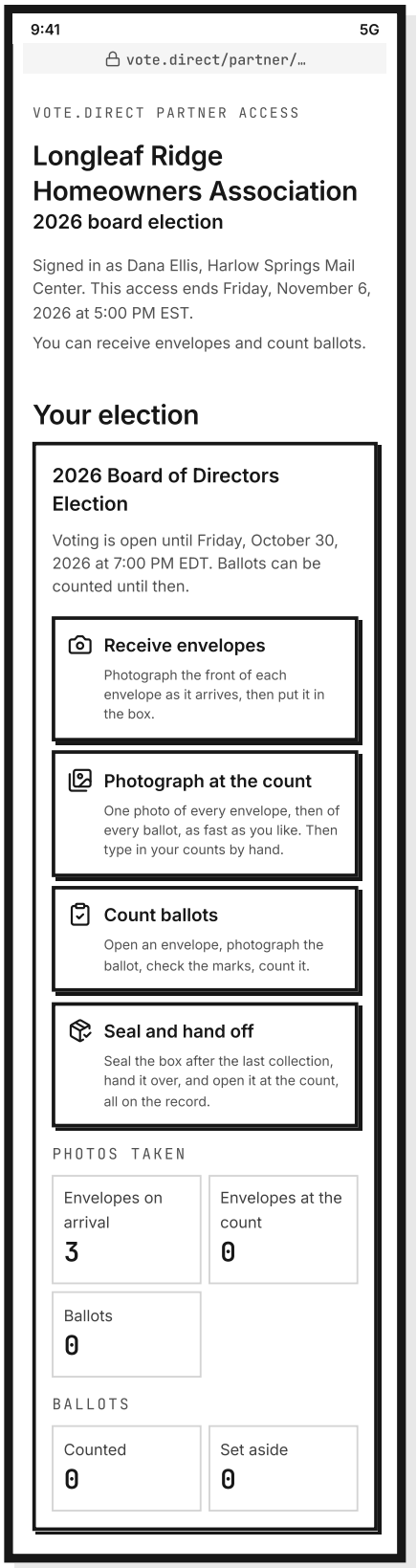


FIGURE 14.3 A partner's home screen for a managed Longleaf Ridge election while envelopes are arriving. Under the four doors it counts the photos taken in each pass and the ballots counted or set aside, never what a photo was read as.

Receive envelopes	The scanner a receiving link opens: one photo per returned envelope as it arrives, a running count, and a count by hand at the end. See Receive envelopes with a phone.
Photograph at the count	The scanner at the count: every envelope photographed again before it is opened, then every ballot, and the counts by hand. A sign-in that may count sees it, and if it may also receive envelopes, the scanner includes the arriving envelopes too. It only takes photos, so it is there whatever the election's status. See Photograph envelopes and ballots at the count.
Count ballots	The Enter ballots screen. The partner opens one envelope at a time, photographs the ballot, checks the marks the screen proposes against the paper, and presses **Count this ballot**. Counting works only while voting is open. See Enter a returned ballot.
Seal and hand off	The record of the box the envelopes are kept in, described next.

Under the doors, **Photos taken** counts the photos of each pass, and **Ballots** counts those **Counted** and **Set aside**. The partner checks these against their own count by hand. The screen never says what a photo was read as: which home an envelope belongs to, and whether it matched, stays with vote.direct and the organizer.

On a secret ballot election, a partner counting ballots never sees whose ballot it is.

The record of the box

Under **Seal and hand off**, the partner picks one of three steps under **What are you doing?**:

Step	What the partner records
Seal the box	"After the last collection: count, tape, write the seal number." The envelope count and the seal number.
Hand off the box	"Only to the person Vote.Direct named, after checking a photo ID." The count, the seal number, who is taking the box, the tick box **I checked their government photo ID**, and both people's signatures on the phone.
Open the box	"At the count: check the seal before anything comes out." The count, the seal number, and whether the seal is whole and matches.

Each step can carry a photo of the box and a note, and is saved with **Record it**. If the count differs from the number of envelopes photographed, the screen tells the partner to stop and call vote.direct, and a note saying what they found is required. A hand-off is not recorded without the photo ID check. Entries cannot be edited, only followed by newer ones, and each is also written to the election's audit log.

The election's Paper ballots page shows this record on its **Returns & counting** tab, in a card titled **The box of returned envelopes**. The card appears once the first envelope is photographed or the first entry is recorded. Its first line says where the box stands: "Open: envelopes are still being received.", "Sealed at the partner.", "Handed off, on its way to the count." or "Opened at the count.", followed by how many envelopes were photographed and the seal number. Below it, each entry shows its step, time, name, count and seal. A count that differs from the envelopes photographed, a seal number that does not match the one recorded at sealing, or a seal reported broken at the count is called out in yellow on its row.

PART THREE

Beyond elections

Free surveys and quick polls, live meetings with motions voted from phones, announcements to your members, documents sent for electronic signature, and Governance Center for running the rest of a community.

CHAPTER 15

Surveys and quick polls

Build a free survey or quick poll, share it by link, QR code or on your own website, and read the answers as they come in. This chapter also shows when to turn a survey into a verified election instead.

IN THIS CHAPTER

- Surveys, quick polls and elections
- Your surveys list
- Build a survey
- Question types
- Theme and settings
- Save a draft or publish
- Share your survey
- What respondents see
- Your survey's page and results
- Who can see the results
- Close, reopen, copy or delete
- One answer per person: verify emails
- Limits and rules

Surveys, quick polls and elections

A survey on vote.direct is free, with no limit on the number of responses. Anyone who has the link can answer it on a phone or a computer, without an account and without proving who they are. The same person can answer more than once.

A quick poll is a short survey. Wherever vote.direct offers you a quick poll or a free poll, for example the **Create a quick poll** button on the home page or the **Create a free poll** button on the poll maker page, it opens the same survey builder described in this chapter.

	Survey or quick poll	Election
Cost	Free, with unlimited responses	Priced by the number of voters, and free for 25 voters or fewer. See vote.direct/pricing.
Who can answer	Anyone with the link	Only the voters on your list, each checked before they vote
Answers per person	As many as they like	One ballot each
Good for	Reading the room, feedback, planning, picking a date	Board seats, budgets, amendments and other decisions that must hold up

> GOOD TO KNOW
>
> A survey link can be forwarded, and nothing stops one person from answering twice. When the result decides something, run an election instead. The builder can carry your questions into one for you: see One answer per person: verify emails.

Your surveys list

Your surveys live on the **Home** page of your dashboard, under a second tab. At the top of Home you see two tabs: **Votes** (**Verified, certified elections**) and **Surveys** (**Free, open feedback**). Press **Surveys** to open `vote.direct/dashboard/surveys`. Surveys never appear in the Votes list.

The page is titled **Surveys**, with the line **Free, unlimited responses. No email walls.** and a **New survey** button on the right. Below it, each survey you have built is a rounded card, newest first. A card shows the survey's status, its title, the number of responses and the number of questions. Press a card to open that survey's page.

Status	What it means
Draft	Saved but not published. Nobody can answer it and its link does not work yet.
Open	Published. Anyone with the link can answer.
Closed	No longer taking answers. A survey shows Closed as soon as its close time passes.

Before your first survey, the list shows a dashed card: **No surveys yet**, **Build a beautiful survey in minutes. Respondents answer with one tap, no account needed.** and a **Create your first survey** button.

> GOOD TO KNOW
>
> A survey belongs to the person who built it. Other members of your team do not see your surveys in their list and cannot open your survey's page. Share the answers with them by exporting the spreadsheet or the PDF report.

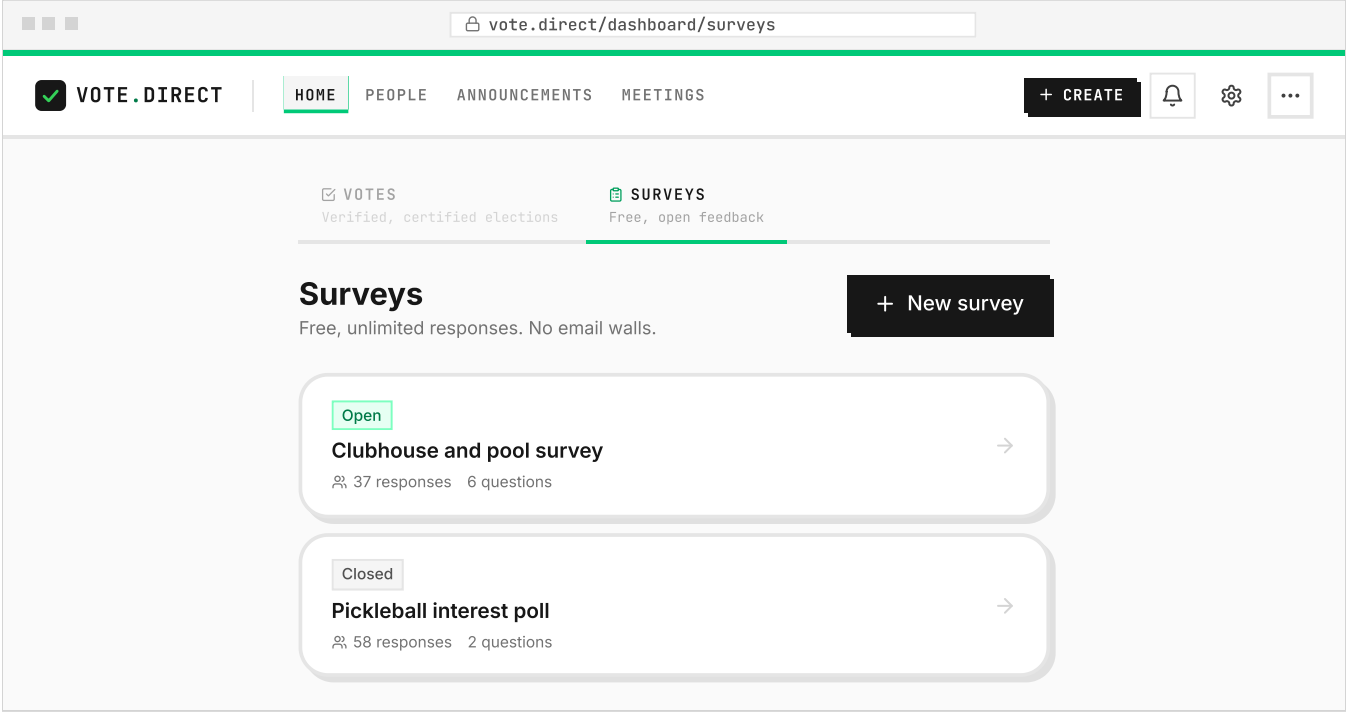


FIGURE 15.1 The Surveys tab on Home. Each rounded card shows a survey's status, title, responses and questions, and opens the survey's page.

Build a survey

1. On the Surveys tab, press **New survey**. The builder opens at `vote.direct/surveys/create`. If you are not signed in, you are asked to sign in first and then brought straight back.
2. Give the survey a title and, if you like, a description.
3. Write your questions. Pick a type for each one from the pills on its card.
4. Choose a theme and check the settings.
5. Watch the live preview on the right, then press **Publish**.

The builder is softer than the rest of vote.direct: rounded cards and pill buttons. A bar across the top reads **Survey builder** with **Free. No email walls. Unlimited responses.** under it, and holds the two buttons that matter: **Save draft** and the green **Publish**. The bar stays at the top of the window as you scroll. On a wide screen the questions are on the left and the live preview is on the right. On a narrow screen the preview sits below the questions.

Above the first card, a gray line reminds you of the trade you are making: **This poll is a link anyone can open, and answer more than once.** followed by the link **Need one answer per person? Add email verification**.

> GOOD TO KNOW
>
> The builder keeps your work in this web browser as you type, so a reload does not lose it. It is not saved to your account until you press **Save draft** or **Publish**, and a PDF you attach is not kept by a reload. If you switch to another computer, your unsaved work is not there.

Start from a template

While the builder is still empty, a card titled **Start from a template** offers five ready-made surveys, with the line **Pick one and tweak it, or ignore this and start typing below.** Press a template to fill in its title, description and questions. Your theme and settings stay as they are. Press the **X** on the card to hide it. The card disappears as soon as you start typing.

Template	Its line on the card	Questions
Net Promoter Score	The classic loyalty question, ready to send	2
Event feedback	Find out what landed and what to fix	4
Member satisfaction	Hear from your community or association	4
Team pulse check	A 60-second weekly check-in	3
Customer feedback	Learn why they stay and what to improve	4

Title, description and a PDF

The first card holds the title (large, with the placeholder **Untitled survey**) and the description (**Add a description. Tell people what this is about. Line breaks are kept.**). A title is required. When a field gets close to its limit, a counter such as **185 of 200 characters** appears under it.

Under a thin line, the dashed pill **Attach a PDF (optional)** lets you add one PDF of up to 10 MB, for example the pool rules or a contractor's quote. Respondents see it under your description and can open it there. The file uploads when you save or publish. Once a survey is published, its PDF cannot be added or changed, so check the attachment before you publish.

Questions

Each question is a rounded card. Its number sits at the top left. At the top right are four small buttons: **Move up**, **Move down**, **Duplicate** and **Delete**. You cannot delete the only question. Under them, three rows of pills choose the question type (see Question types). Then come the question itself (**Ask a question**), a small **Add help text** button for a line of explanation under the question, the settings for the type, and a **Required** switch at the bottom of the card.

Press the dashed **Add question** button under the last card to add another. A new question starts as multiple choice with two empty options.

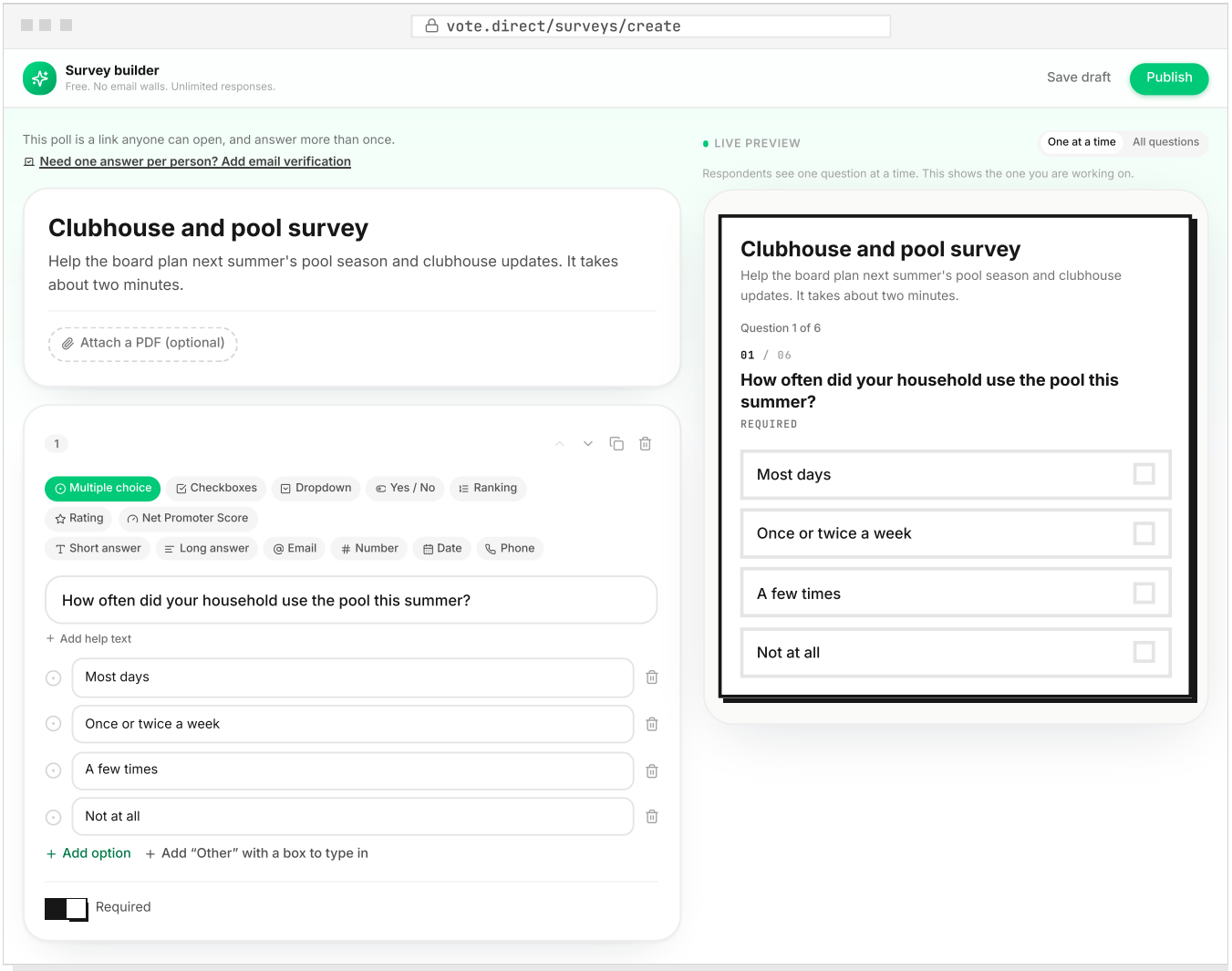


FIGURE 15.2 The survey builder with the Clubhouse and pool survey open. The question card you are working on (left) is what the live preview shows (right), drawn in the survey's theme.

The live preview

The right-hand column, marked **Live preview**, draws the survey the way respondents will see it, in the theme you picked. A small switch above it chooses **One at a time** (the default, showing the question you are working on) or **All questions**. Respondents always see one question per screen. Until a question has text, the preview reads **Your questions will appear here as you build.**

Question types

The pills on each question card come in three rows. The first row asks people to pick from answers, the second to give a score, and the third to type an answer. Switching a question to another type keeps everything you typed, so you can switch back.

Type	What respondents do	Settings on the card
Multiple choice	Pick one answer from a list.	Options (at least 2). **Add "Other" with a box to type in** adds an **Other (please specify)** answer with a text box.

Type	What respondents do	Settings on the card
Checkboxes	Tick as many answers as allowed.	Options, the Other answer, and **How many can they tick?**: **As many as they like** or **Up to 2**, **Up to 3** and so on. An Other answer counts as one pick.
Dropdown	Pick one answer from a list that opens when they tap it. It starts as **Choose an answer**.	Options. Good for long lists, such as street names or unit numbers. A dropdown cannot have the Other box: add "Other" as one of its options instead.
Yes / No	Choose Yes or No.	None.
Ranking	Put the options in order with up and down arrows. If the order shown is already right, they press **Keep this order**.	Options.
Rating	Tap one numbered button on a scale.	**Scale** from one whole number to another, anywhere from 0 to 10 (it starts at 1 to 5), plus **Low label** and **High label**. Without labels, respondents see Low and High.
Net Promoter Score	Tap a number from 0 to 10.	**Words under 0** and **Words under 10**, which start as Not at all likely and Extremely likely. The scale is always 0 to 10. Results show the Net Promoter Score itself.
Short answer	Type one line, up to 200 characters.	**Placeholder text (optional)**: gray hint text shown in the empty box.
Long answer	Type several lines, up to 2,000 characters.	Placeholder text.
Email	Type an email address. It must look like name@example.com before they can go on.	Placeholder text.
Number	Type a number using digits, like 12 or 3.5.	**Smallest answer allowed** and **Largest answer allowed** (leave both empty to accept any number), and placeholder text.
Date	Pick a date from a calendar.	None.
Phone	Type a phone number with 7 to 15 digits.	Placeholder text.

For the Email, Number, Date and Phone types, respondents are checked as they leave the box, and told what to fix in plain words, for example **Please check the phone number. It needs 7 to 15 digits, like 555-010-0199.** A number outside the range you set gets a message such as **Please type a number from 1 to 10.**

Theme and settings

Two cards below your questions set how the survey looks and behaves.

Theme

The **Theme** card offers eight looks as pill buttons: **Signal** (the default), **Clean**, **Sky**, **Grape**, **Peach**, **Pine**, **Tide** and **Dark**. The live preview changes as you pick. There is no logo upload and no custom color.

Settings

Setting	Starts	What it does
Anonymous responses	On	On: **Answers aren't tied to anyone. You see overall results, not who picked what.** Off: **Identified. Each response shows the respondent's name and email beside their answers.**
Show results to respondents	On	On: **After answering, people can see the results so far. Once the survey closes, anyone with the link can see them.** Off: **Only you can see the results. People who answer are not shown them, before or after the survey closes.** You can change this later on the survey's page.
Ask for respondent name	Off	Adds a name field at the end of the survey. When on, a **Required** switch appears: **Respondents must answer to submit** or **Respondents can skip it**.
Ask for respondent email	Off	Adds an email field at the end, with the same Required switch.
Shuffle option order	Off	Shows the answer options in a different order for each response, so the first option does not get an edge.
Close date	Empty	**(optional, stays open if blank)**. Pick a date and time in your computer's time zone. It must be in the future. The survey stops taking answers at that moment. The **X** beside it clears it.

Anonymous, with a name or email. When responses are anonymous and you also ask for a name or an email, the card adds: **You still collect email, but as a separate list: it can't be matched to anyone's answers.** The names and emails come to you as a separate list at the end of the spreadsheet, sorted alphabetically, never beside anyone's answers. When responses are identified, each response carries the name and email the person typed.

> AN EMAIL SOMEONE TYPES IS NOT CHECKED
>
> As soon as you turn on **Ask for respondent email**, the builder says so: **An address they type is not an address we checked. Anyone can enter anything, or somebody else's.** The link **Verify emails before voting instead** under it starts a verified election with your questions. See One answer per person: verify emails.

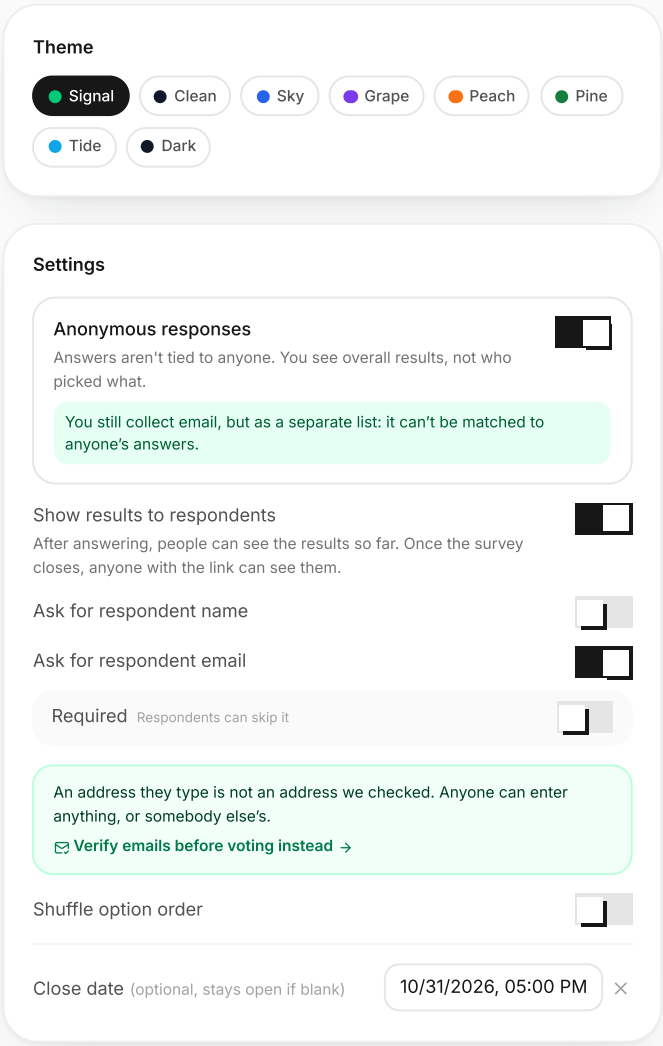


FIGURE 15.3 The Theme and Settings cards for the Clubhouse and pool survey: anonymous, results shown to respondents, an optional email field (with the warning that typed addresses are not checked) and a close date.

Save a draft or publish

Save draft

Press **Save draft** to keep the survey in your account without publishing it. A dialog titled **Draft saved** explains: **Your survey is saved as a draft. It is not live yet, so nobody can answer it and the share link will not work. Publishing is free.** It offers **Keep editing**, **Publish now** and the link **Go to survey without publishing**. The draft appears in your Surveys list with the Draft status.

Saving again later replaces the earlier draft, so your list does not fill with copies. When you publish after saving a draft, you end up with one live survey.

Publish

Press **Publish**. The builder checks every question first. If something needs fixing, a message appears under the field in red, the page scrolls to it, and a notice titled **Almost there** repeats the first problem. Typical messages are **Give your survey a title.**, **Type your question here.**, **Add at least 2 options.** and **That close date has already passed. Pick a later date and time, or clear it so the survey stays open.** The builder also stops you when text has something between the characters `<` and `>`, because that part would be removed when you publish: **The part between < and > would be removed when you publish. Please take out the < or > sign.**

When the survey is live, a dialog titled **Your survey is live** opens with the link, a QR code and two buttons: **Open survey** to see it as a respondent does, and **View responses** to go to the survey's page.

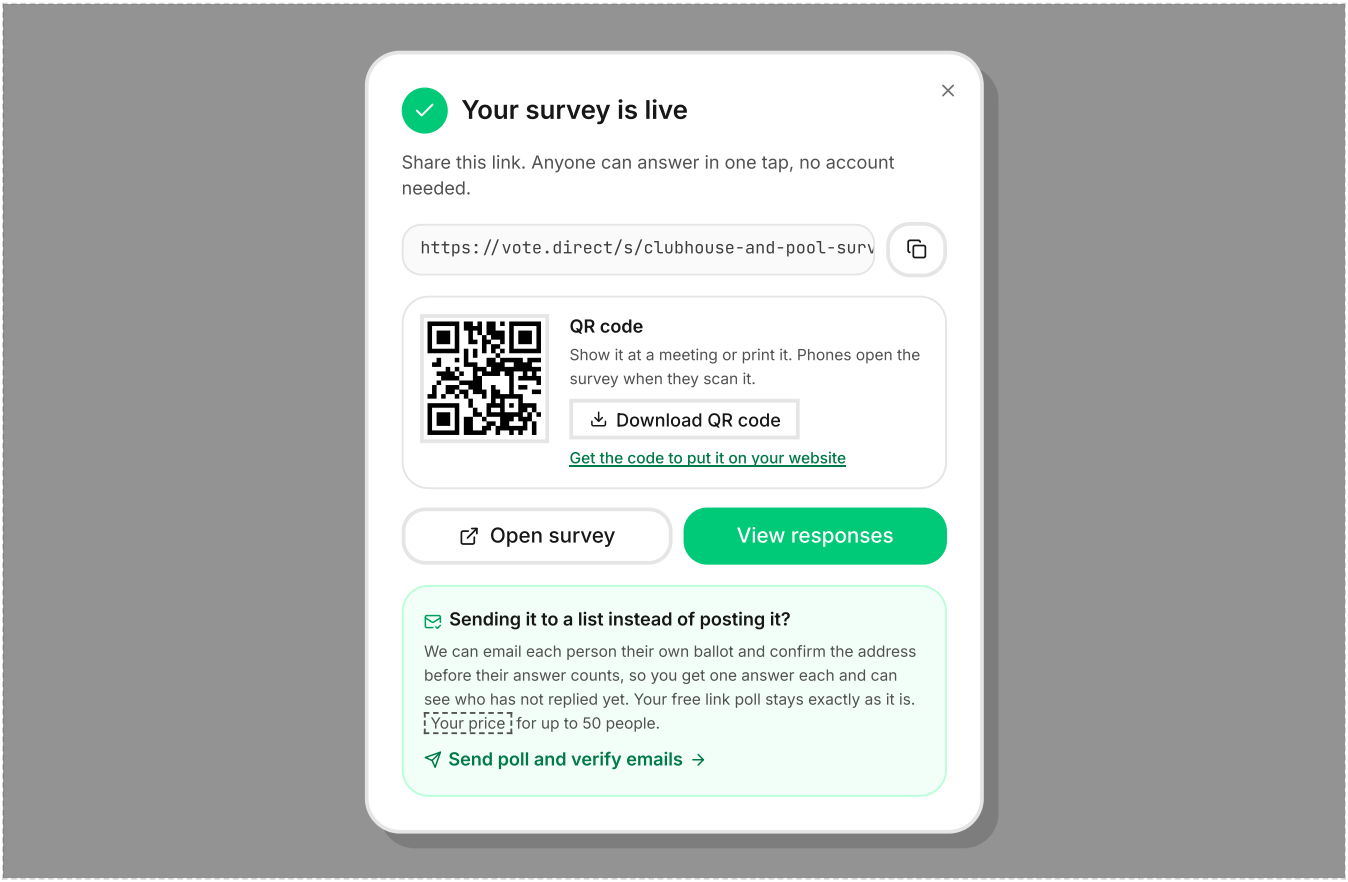


FIGURE 15.4 The dialog that opens when a survey goes live: the link, the QR code and the way to the website code. Where the figure says Your price, the dialog shows the starting price of a verified election.

A live survey cannot be edited

Once people can answer a survey, its questions are fixed. The builder says so at the top in a green box: **This survey is live. People can answer it now, so changes made here are not applied to it. To share a changed version, publish it as a new survey with its own link.** The box has three links: **View responses**, **Open the live survey** and **Start a new survey**.

If you edit anyway and press **Publish** or **Save draft**, a dialog titled **This survey is already live** stops you: **People may already have answered it, so it cannot be changed. Your edits are still here and have not been sent anywhere.** Press **Keep editing** to stay, or **Publish as a new survey** (or **Save as a new draft**) to make a second survey from your edits.

> **BEFORE YOU PUBLISH A NEW VERSION**
>
> A new survey gets its own link and starts with no responses. The first survey stays exactly as it is, with its own link and its own answers. Share only one link, or the answers split between the two.

Start a new survey clears the builder for a fresh survey. If there is typed work in it, it asks first: **The questions here will be cleared. Your published survey is not affected and keeps its link and its responses.**

Share your survey

Every survey has its own address, such as `vote.direct/s/clubhouse-and-pool-survey`. You can share it three ways. All three are on the survey's page, in the card titled **Share this survey**, which appears while the survey is open.

The link	Press **Copy** beside the address, then paste it into an email, a newsletter, a group chat or a notice. The card's first line confirms the terms: **Anyone with the link can respond. No account needed.** followed by the close time, or **It stays open until you close it.**
The QR code	Press **Download QR code** to save a picture file big enough to print, named like `survey-clubhouse-and-pool-survey-qr-code.png`. Put it on a slide at your meeting or on a notice by the mailboxes. People point a phone camera at it and the survey opens.
On your website	Under **Put it on your website**, copy the code with **Copy embed code** and paste it into a page of your community's website. People answer right there, without leaving your site. **Preview** opens the embedded version on its own.

The website code adds one line under the survey that links to the survey and to vote.direct. As the card says, it sits in your own page, so you can restyle it or remove it. The embedded survey sizes itself to its content, and any link inside it (for example **View Results**) opens in a new tab so your page stays where it is.

What respondents see

Respondents need nothing but the link. The page has no vote.direct menus: only your survey, in your theme, on a card.

1. At the top of the card: your organization's name in small capitals, the title, the description and any PDF. If you set a close date, a countdown in days, hours, minutes and seconds sits above the card.
2. One question per screen. A bar shows progress, labeled **Question 2 of 6** with a percentage. Each question shows its number (**02 / 06**), the question, your help text, a **Required** tag where you set one, and a note such as **Select up to 2**.
3. On a multiple choice, Yes / No, rating or Net Promoter Score question, picking an answer moves to the next question by itself after a moment, with a short **Next question…** bar. Otherwise they press **Next**, or **Back** to change an earlier answer. **Next** stays gray until a required question is answered. Questions that are not required can be skipped.

4 If you ask for a name or an email, a last screen titled **Almost there** appears, marked **A few details**, with **The survey creator asked for the following.** Fields you did not make required say **(Optional)**.

5 On the last screen the button reads **Submit**. A security check runs in the background first, shown by a small badge under the buttons (**Securing…**, then **Verified Secure**). If the check needs the person to do something, a small challenge appears directly above the buttons, and the badge reads **Complete the check above**. **Submit** stays gray until the check is done.

6 After **Submit**, a large green check and **Response submitted** with **Thanks. Your answers were recorded.**

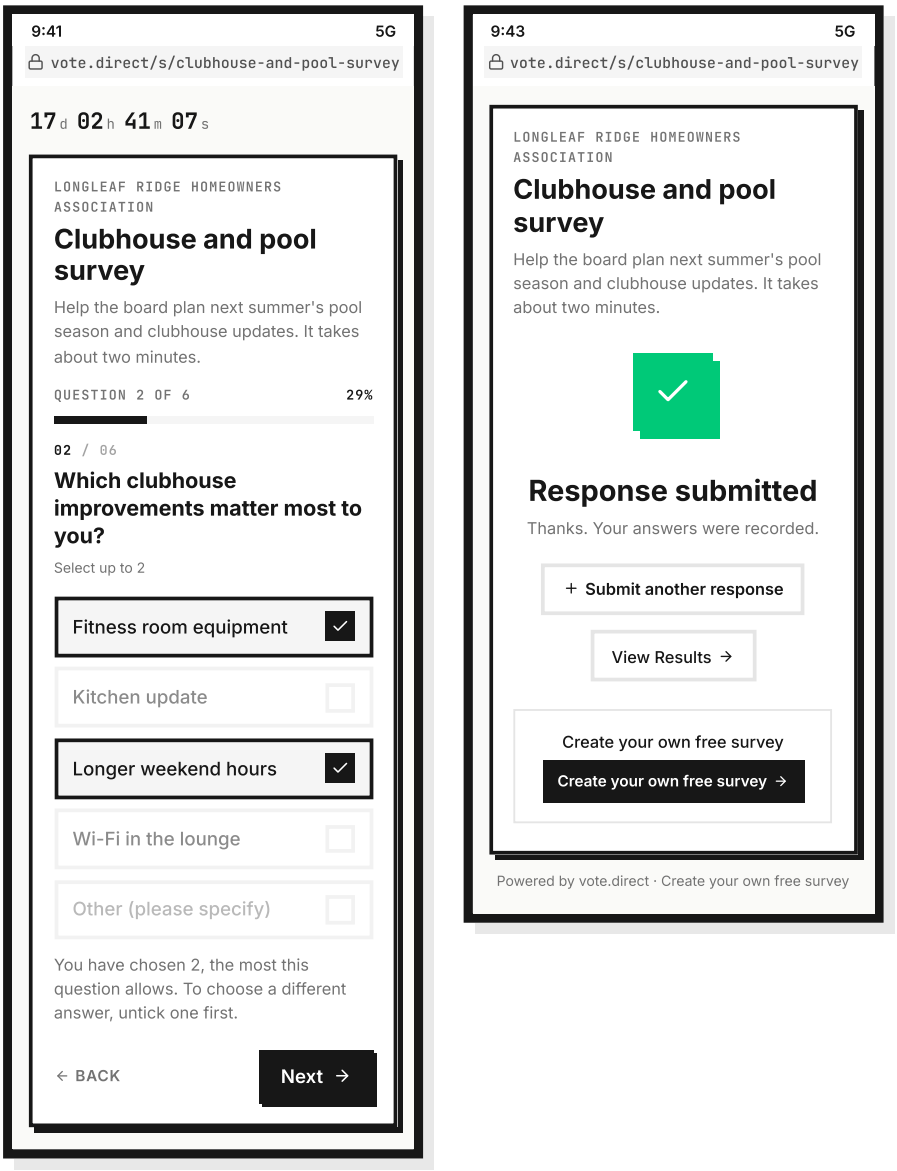


FIGURE 15.5 What a respondent sees on a phone: a checkboxes question with its limit reached (left) and the thank-you screen (right), in the default Signal theme.

The thank-you screen

- **Submit another response** starts a fresh, empty response on the same device. It is there for a tablet passed around a room: each person answers in turn.

- **View Results** appears only when people who answer may see the results right away (see Who can see the results).
- A box offers **Create your own free survey**, and the page footer reads **Powered by vote.direct · Create your own free survey** with a language menu (English, Español, Français and Chinese). The language menu translates many of the page's buttons and messages. It does not translate your questions.

Other things respondents may see

When	What the page says
They reload part way through	**Welcome back. We kept the answers you had already given.** with a **Start over** link. Answers are kept in that browser tab for up to 12 hours.
The close time passes while they answer	**The closing time for this survey has passed. Your answers are still here. Press Submit to try sending them, and we will tell you if they can still be accepted.**
The survey is closed	**This survey is closed. Thanks for stopping by.** plus a **View results** link when results are public after closing.
The survey is still a draft	**This survey isn't available yet. Check back soon.**
Many people answer at once	**A lot of people are answering right now. Your answers are still here. Wait a moment and press Submit again.**
Their connection drops	**We could not reach vote.direct. Your answers are still here. Check your connection and press Submit again.**

Your survey's page and results

Open a survey from your Surveys list, or press **View responses** in the builder. At the top are the link **All surveys**, the status, the words **Free survey**, the title, your organization's name and an **Open survey** button that opens the survey as respondents see it.

The first card depends on the status:

- **Draft: This survey is not live yet**, **Nobody can answer a draft and its link will not work. Publishing is free and takes one click.** and a **Publish this survey** button.
- **Open:** the **Share this survey** card, with the link, the QR code and the website code (see Share your survey).
- **Closed: This survey is closed**, with when it closed, the line **You can reopen it if you need more answers.** and a **Reopen survey** button.

Below that are two tiles, the number of responses and the number of questions, and a green-edged card titled **Export your data**.

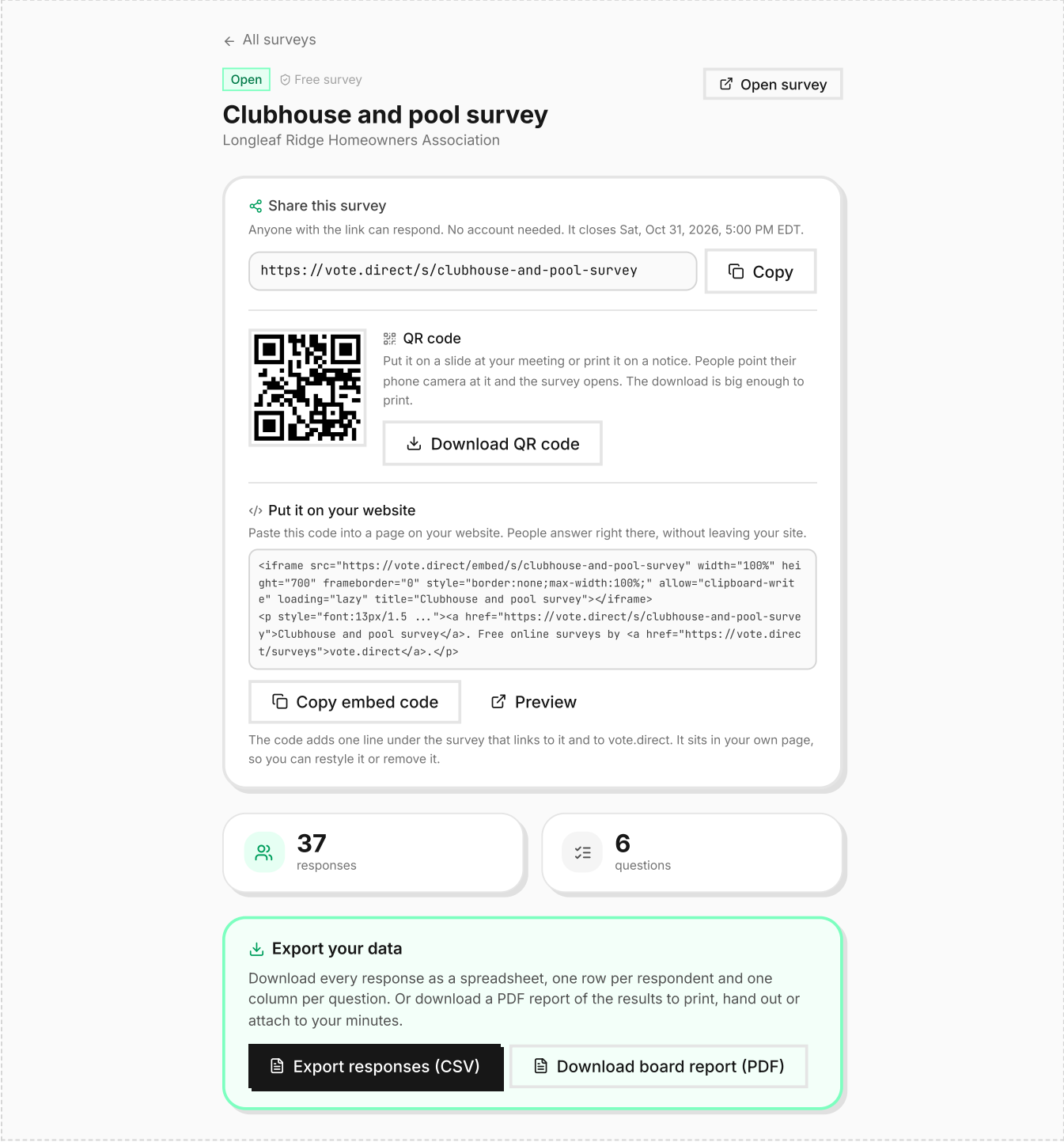


FIGURE 15.6 The top of an open survey's page: the share card with its link, QR code and website code, the two count tiles, and the export card.

Export your data

Both buttons stay gray until the first response comes in, with the line **Export unlocks once you have at least one response.**

Export responses (CSV)	A spreadsheet file, oldest response first. The columns are **Response #**, **Submitted At**, then one column per question. An identified survey that asks for them adds **Name** and **Email** columns. Several ticked answers are separated by semicolons, and a ranking is written in order with `>` between the options. On an anonymous survey that asks for names or emails, those come last, under the line **Respondent contacts (collected separately, not linked to the answers above)**.
Download board report (PDF)	A printable letter-size report titled **Survey results**: the number of responses and questions, when the survey opened and closed, each question in order with counts and percentages, written answers printed word for word at the end (a very long list prints the first ones, and the CSV has every answer), and a section titled **How these responses were collected** that states plainly that the link was open and whether answers were anonymous. It never prints a name or an email address, and answers to Email and Phone questions are counted but not printed. Times use the time zone of the computer you download it on.

Results

Under the heading **Results**, each question gets its own card with **37 of 37 answered** under it: how many of your respondents answered that question. Every percentage is a share of those people. While the survey is open, the page checks for new responses every 30 seconds and updates itself (**New responses appear here on their own while the survey is open.**).

Question type	How the results show
Multiple choice, Dropdown, Yes / No	A bar for each answer, with the number of responses and the percentage.
Checkboxes	The same bars, with the note **People could choose more than one answer, so the percentages can add up to more than 100%.**
Ranking	A table with **Option**, **Average position** and **Ranked first**, sorted best first. **1 means people put it first, so lower is more popular.**
Rating	The average, such as **4.09 average out of 5**, and a bar for each number.
Net Promoter Score	The score on a scale from minus 100 to 100, three tiles (**Promoters** answered 9 or 10, **Passives** 7 or 8, **Detractors** 0 to 6), then the average and the bars.
Short answer, Long answer, Email, Number, Date, Phone	A row such as **12 written answers**. Press it to read the answers, 20 at a time, with **Load more responses** for the rest and an **Export CSV** link beside it.

Read each response

The card **Read each response** shows everything one person answered. Press **Start with the first response**, then **Previous** and **Next**. Each response shows when it was sent and, on an identified survey, the person's name and email. On an anonymous survey it says: **This survey is anonymous, so names and emails are never shown next to answers.** A skipped question reads **No answer**.

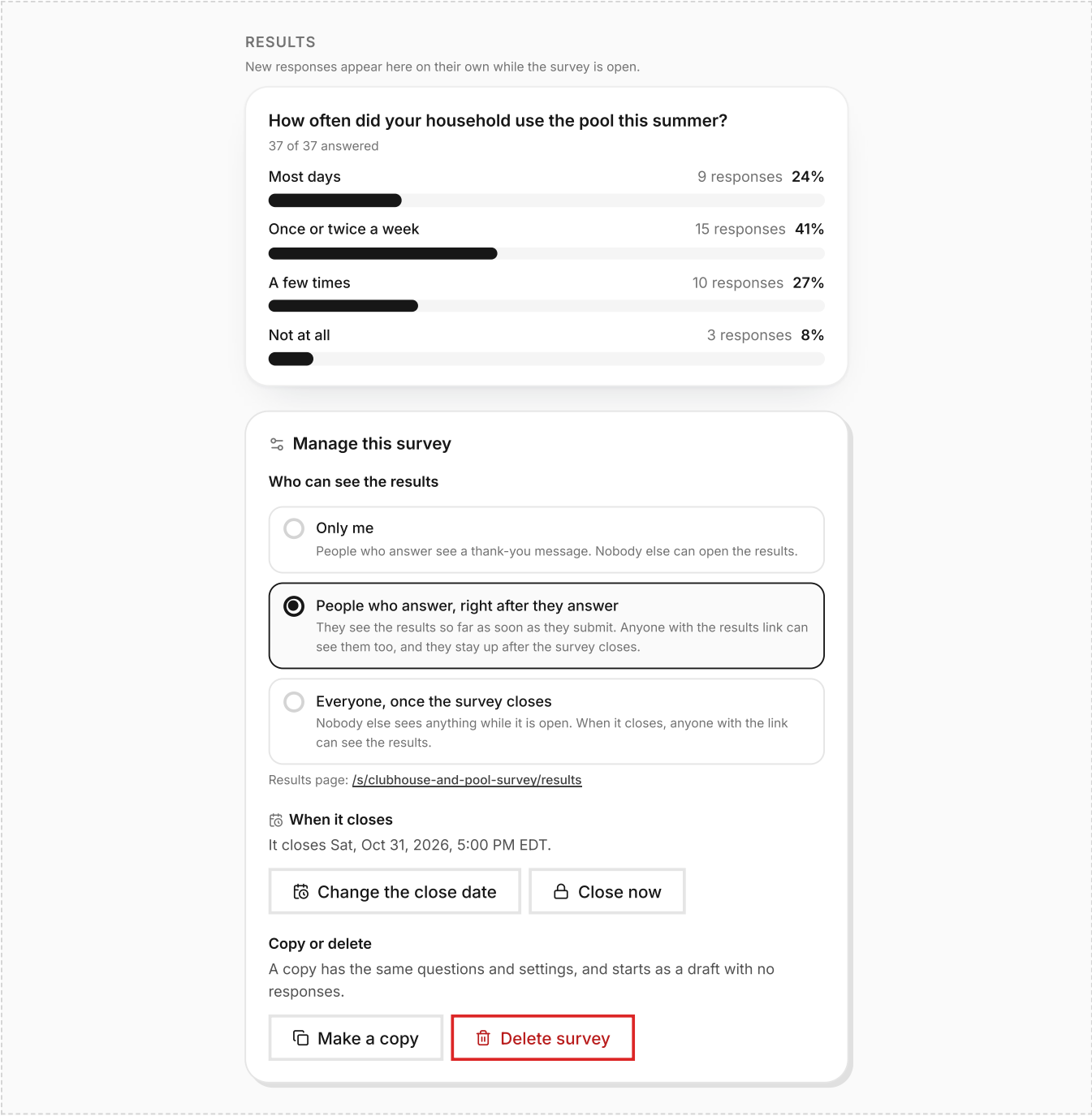


FIGURE 15.7 Further down the survey's page: the results for one question, and the Manage this survey card where you choose who sees the results, change the close date, close early, copy or delete.

Who can see the results

In the card **Manage this survey**, the first section, **Who can see the results**, offers three choices. Your pick is saved the moment you press it, with a short confirmation.

Choice	Respondents	Anyone with the results link
Only me	See a thank-you message, no results.	See **Results aren't public for this survey.**
People who answer, right after they answer	See a **View Results** button on the thank-you screen.	See the results while it is open and after it closes.
Everyone, once the survey closes	See no results while it is open.	See **Results will be shared when this survey closes.** until it closes, then the results.

The builder's **Show results to respondents** switch sets the first two: on is **People who answer, right after they answer**, off is **Only me**. The third choice is only on the survey's page.

The public results page is at `vote.direct/s/clubhouse-and-pool-survey/results`, and the card shows that address under the choices whenever results are not private. It shows the number of responses and the same result cards as your page, in the survey's theme, with one difference: written answers show only their count, never the text. Its footer offers **Back to survey** and **Create your own free survey**.

Close, reopen, copy or delete

When it closes

The section **When it closes** states the close time, or **It stays open until you close it.** Press **Set a close date** (or **Change the close date**) to open a date and time field titled **Close date and time**. The line under it names your computer's time zone, for example **Times are in your time zone (America/New_York).** Press **Save close date**. **Remove the close date** keeps the survey open with no end. The time must be at least a minute away: **Pick a close time in the future. To stop answers right away, use Close now instead.**

Close now

Press **Close now**. A confirmation asks **Close this survey now?** with **Nobody will be able to answer it after this. The results stay here, and you can reopen it later if you change your mind.** Press **Close the survey**, or **Keep it open**.

Reopen

On a closed survey, press **Reopen survey** in the closed card. Choose **Keep it open until I close it** and press **Reopen now**, or choose **Close it on a date I choose**, pick the date and press **Reopen until this date**. Answers already collected stay, and new ones add to them.

Make a copy

Make a copy creates a new draft with the same questions and settings and no responses, and opens its page. A notice confirms: **It has the same questions and settings, and starts as a draft, so nobody can answer it until you publish it.** Use it to run the same survey again next season.

Delete

Delete survey asks **Delete this survey?** On an open survey the message is **It closes right away and the link stops working. The survey and its results leave your account. If you want to keep the answers, export them first.** Press **Delete the survey** to confirm, or **Keep it**.

> BEFORE YOU DELETE
>
> Download the spreadsheet and the PDF report first. After you delete a survey, its page, its results and its exports are gone from your account, and its link stops working.

One answer per person: verify emails

A survey cannot tell you who answered or stop one person from answering twice. When you need exactly one answer from each member, the builder can turn your survey into a verified election, with the questions you already wrote. You find the offer in four places: the link **Need one answer per person? Add email verification** above your questions, the box **Sending this to specific people?** under the Settings card with its **Send poll and verify emails** button, the panel at the bottom of the **Your survey is live** dialog, and a card at the bottom of the survey's page once answers come in (**Add verification to this poll**, or **Send this to a verified list** at 10 responses or more).

1. Press **Send poll and verify emails** (or the button on the card). If you have an unfinished election in the election builder, you are asked **Replace your unfinished vote?** first.
2. The election builder opens at the step that asks who may vote, with your title, description and questions already filled in. A dropdown becomes a multiple choice question, a Net Promoter Score becomes a 0 to 10 rating, and Email, Number, Date and Phone questions become written answers.
3. Add your voters and continue as in Build the election and Voters and your roster.

Your survey is not changed: its link keeps working and keeps its answers. An election has a price. The builder's box shows the starting price, the cards on the survey's page show the price for a group the size of your responses so far, and the election builder shows the price for your list on its Voters step and again on Review before you pay. Elections of 25 voters or fewer are free. See vote.direct/pricing.

Limits and rules

What	Limit or rule
Responses	No limit. The same person can answer more than once.
Title	Required, up to 200 characters.
Description	Up to 5,000 characters.
Help text under a question	Up to 1,000 characters.

What	Limit or rule
Placeholder text	Up to 200 characters.
Scale labels	Up to 100 characters each.
Questions and options	At least one question. Choice questions need at least 2 options with text.
Rating scale	Whole numbers from 0 to 10, the first smaller than the second.
Short and long answers	200 characters for a short answer, 2,000 for a long answer.
Number questions	The smallest and largest answers may be up to one trillion either side of zero, and the smallest must be less than the largest.
Text between < and >	Not allowed in any text you type, because the part between the two signs would be removed.
PDF attachment	One PDF, up to 10 MB, added when you save or publish.
Saving	Up to 30 new surveys and 120 saves of an existing draft an hour. Past that: **You have saved a lot of surveys in the last hour. Please wait a few minutes, then try again. Your work is still here.**
Exports	Up to 20 downloads an hour, shared with your other exports: **Too many export requests. Try again later.**
Who sees your surveys	Only you, the person who built them.
Editing	A live or closed survey cannot be edited. Publish a new survey for a changed version.

CHAPTER 16

Live meetings

Run a meeting under Robert's Rules where members check in once and vote yes, no or abstain on each motion from their own phones. This chapter covers setting the meeting up, running it from the chair's console, what attendees see, and the record you keep afterwards.

IN THIS CHAPTER

- What a live meeting is
- Who can run one, and the price
- Create a meeting
- The chair's console
- Before the meeting: open the floor
- Who can vote: your list and the invitation
- The floor: quorum, call to order, adjourn
- Make a motion and put it to a vote
- How a motion is decided
- The record and the spreadsheet
- What attendees see
- Statuses and limits
- What the console does not do
- Motion reference

What a live meeting is

A live meeting is a voting floor for a meeting that is happening now, in a room, on a video call or both. You, the chair, run it from a screen called the console. Each attendee opens one link on a phone or computer, checks in with an email address and a six-digit code, and then votes on every motion you put to the floor. You see the count as votes come in. When you close a vote, the result is worked out under the rule you chose and appears on every attendee's screen.

A live meeting is different from an election. An election runs for days, by invitation, with a ballot of questions. A live meeting runs for an evening: motions are made, seconded and voted on as the business comes up.

To open it, choose **Meetings** in the menu at the top of your dashboard. The page is `vote.direct/dashboard/meetings/live`. If your organization has a Governance Center plan, **Meetings** opens your meeting calendar instead, and its **Run a live meeting** button brings you here. In the Board Office on governance.center, open the **Meetings** room and choose the **Live meetings** tab (see Governance Center).

Who can run one, and the price

Any owner, admin or editor of your organization can create and run live meetings, and so can the person who created a meeting. No plan is needed. A teammate with the viewer role sees a locked page with **Only organization owners, admins and editors can run meetings.** (see Team and roles).

A meeting has one price, and every motion in it is included. The price depends on how many people you expect, in the same size bands as elections. Meetings for up to 25 attendees are free. While you set a meeting up, a sentence under the attendee count shows the price for that number, for example **Free for up to 25 attendees, every motion included.** For larger meetings the sentence shows the price and the band, such as up to 200 attendees. Meetings over 5,000 attendees are quoted individually. See vote.direct/pricing.

- **When you pay:** when you press **Open the floor**, not before. Creating the meeting, building your list and queuing motions cost nothing.
- **How you pay:** a free meeting costs nothing. If your organization has a current subscription plan and the meeting admits only people on your list, the plan covers it. Otherwise the price comes from your account's prepaid balance if it is enough, and if not you go to a card payment page. See Billing and payments.
- **Your list counts too:** the price follows whichever is larger, the attendance you expect or the number of people on your list. A list of 212 members prices the meeting for the band that holds 212, even if you expect 120 to come.

> GOOD TO KNOW
>
> A plan does not cover a meeting that admits anyone with the link, because anyone can check in to it. Use a list when you want your plan to cover the meeting.

Create a meeting

The page is headed **Live meetings**, with **Run a meeting under Robert's Rules. Attendees check in once, then vote on every motion from their phones. One price per meeting, every motion included.** Press **New meeting**. A form opens above your list of meetings.

Field	What to enter
Title	The meeting's name, as attendees will see it. Up to 200 characters.
Date and time	When the meeting starts.
Timezone	The meeting's time zone. It starts as your computer's zone. Common zones are listed by name, such as **Eastern Time (ET)**.
Expected attendees	How many people you expect. The sentence under it shows the price for that number.
How people check in	**Only people on a list I upload** (the default): only addresses you add can check in. **Anyone with the link**: anyone who opens the link can check in with an email address.
Passcode (optional)	Only for **Anyone with the link**. 4 to 32 characters, read out or shown in the room (the placeholder says **Read out in the room**). **Anyone who opens the link is asked for it before they check in.**
Quorum target (optional)	A whole number. **The console counts the people checked in against this number.**

> TIP
>
> Use digits only for a passcode. The attendee's passcode box opens a number keypad on most phones, so letters are hard to type there. The passcode must also be typed exactly as you set it.

Press **Create meeting**. If something is missing you see a message under the field, such as **Give the meeting a title.**, **Choose a date and time.**, **How many people do you expect?** or **A quorum target is a whole number above zero.** When the meeting is created, a notice says **Meeting created** with **The console is ready.** and the console opens. The new meeting is a draft: nothing is charged and nobody can check in yet.

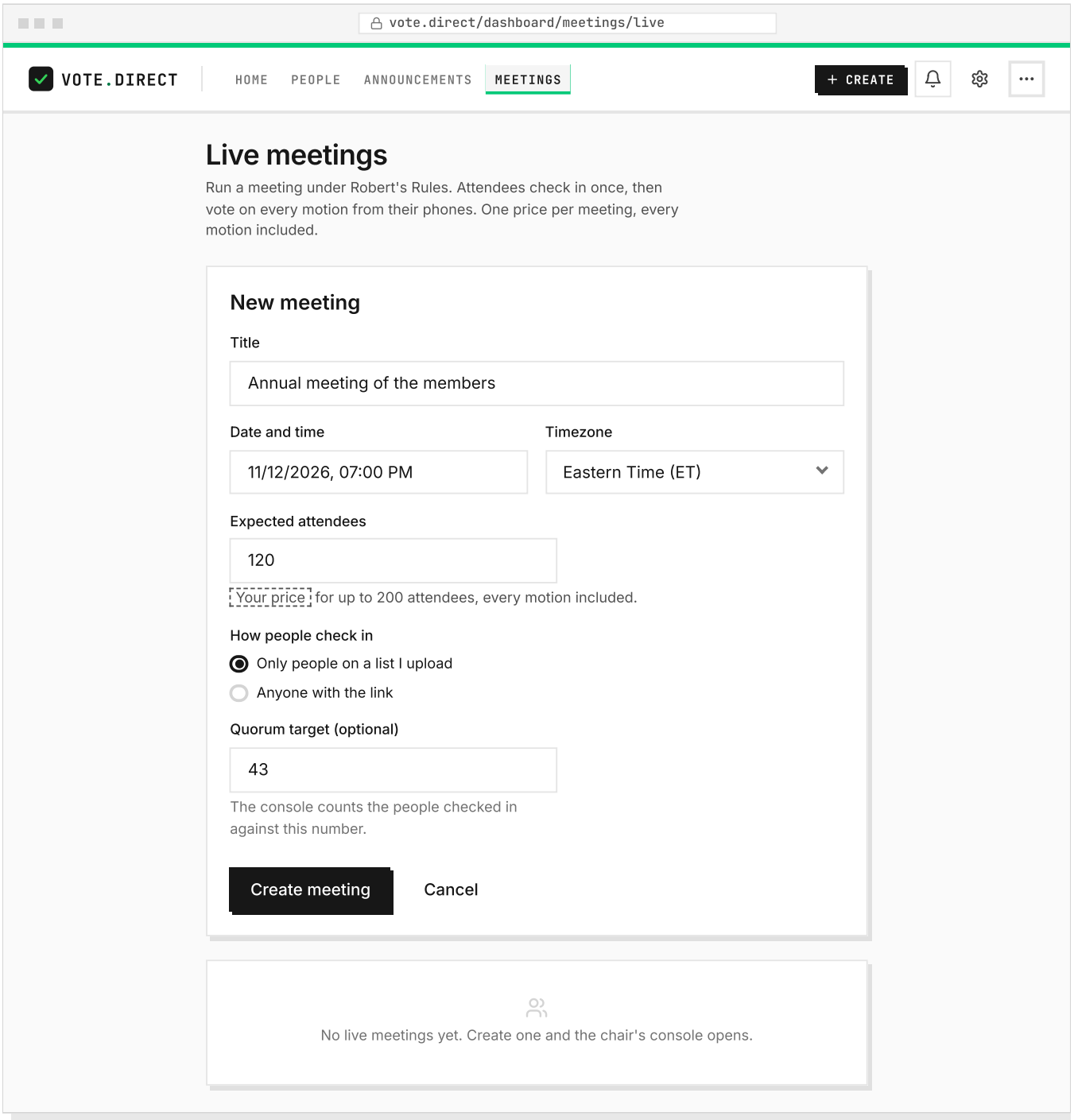


FIGURE 16.1 The New meeting form filled in for the Annual meeting of the members. Where the figure says Your price, the form shows the price for the attendance you type.

The list of meetings

Every meeting your organization has created is listed on this page, latest start time first. Each row shows the title and status, the date and time, then **212 on the list** (or **Anyone with the link**), **47 present** and **2 motions**. On the right is the price: **Free**, the amount, or for a draft the amount it will cost followed by **when the floor opens**. A meeting too large to price on screen shows **Quoted individually**. Press a row to open its console.

The chair's console

The console is one long page that runs the whole meeting. From the top down it has:

- **The header: Live meetings** (back to the list), the title and status, the date, time and time zone, and three buttons: **Download CSV**, **Delete draft** (drafts only) and **Cancel meeting** (before the meeting starts).
- **Attendee link:** the one address every attendee opens, such as `https://vote.direct/m/k7hq2wmr9p`, with a **Copy** button. If you set a passcode, it is shown under the link.
- **Before the meeting:** the price and the **Open the floor** button.
- **Who can vote:** how votes count, your list and the invitation. It stays on the page through the meeting, because people are often added during it.
- **The floor:** who is present, the quorum line, **Call to order** and **Adjourn**.
- **Make a motion**, then **Motions** (newest first) and the **Record**.

The console refreshes itself every few seconds, faster while the floor is open, so the count and the list of people present stay current without a reload.

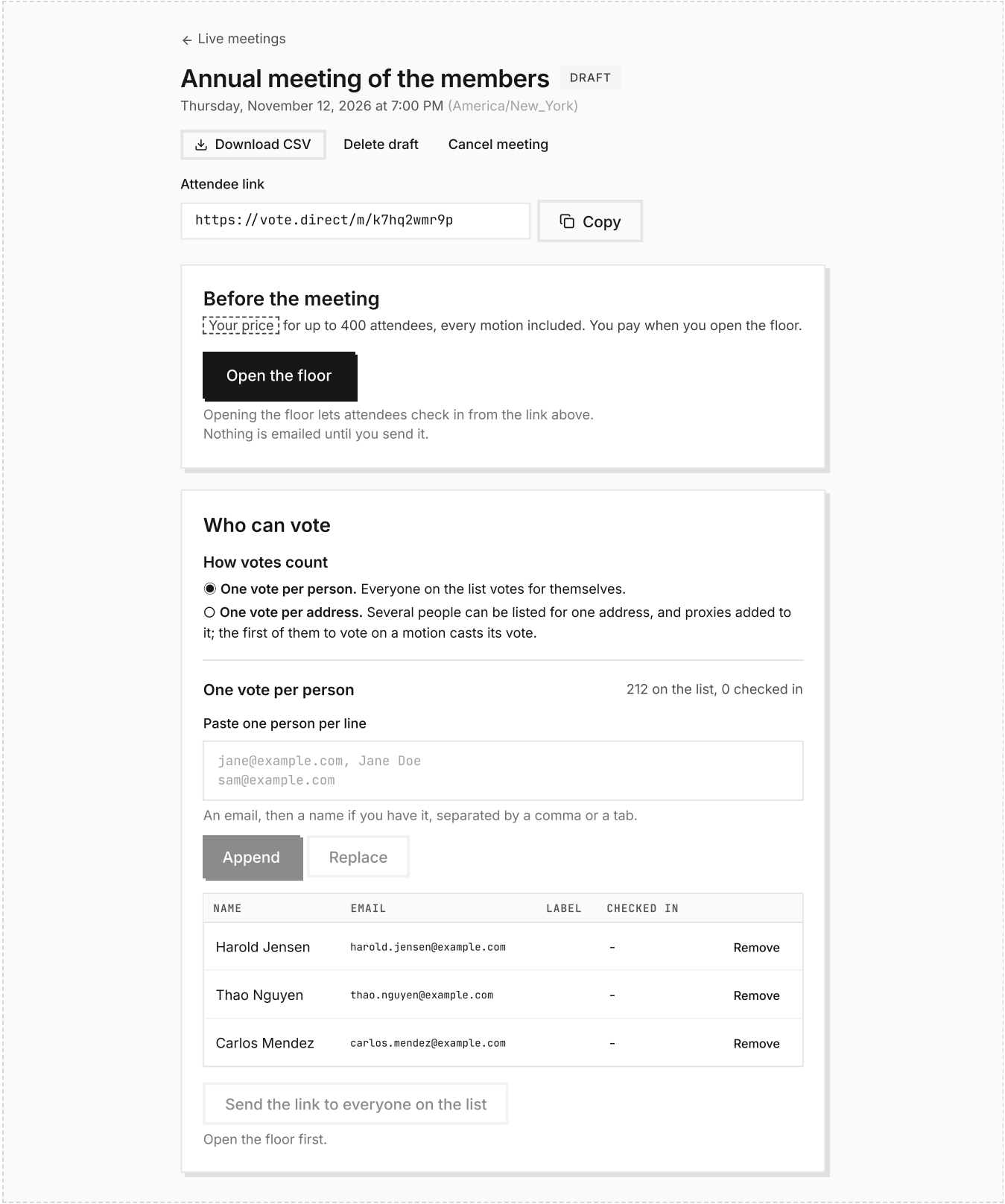


FIGURE 16.2 The top of the console for a draft meeting with 212 members on the list. The list is longer than the 120 expected, so the price is for the band that holds 212. Where the figure says Your price, the console shows the price.

Before the meeting: open the floor

The card **Before the meeting** starts with the price sentence and where you stand with payment: **You pay when you open the floor.** on a draft, then **Free.**, **Covered by your plan.** or the amount paid and the date once the floor is open.

1. Check the title, the time and your list. You cannot change the meeting's details after you create it, and the price band is fixed once the floor opens.
2. Press **Open the floor**. A free or plan-covered meeting opens at once. Otherwise the price is taken from your prepaid balance, or you go to the card payment page. When you come back from paying, a notice says **Payment received. The floor is open.** If you leave the payment page instead, it says **Checkout was canceled. The floor is still a draft.**
3. The status changes to **Floor open for check-in**. Attendees can now check in from the link, and you can send the link by email.

Opening the floor does not email anyone. While it is a draft, you can still queue motions you plan to raise (see Make a motion and put it to a vote).

> BEFORE YOU OPEN THE FLOOR
>
> Opening the floor is when the meeting is charged, and after that the meeting cannot be deleted, only canceled. If a paid meeting has to be called off, cancel it and contact support about the charge (see Getting help).

Who can vote: your list and the invitation

On a meeting that admits only people on your list, the card **Who can vote** sits under **Before the meeting** and stays on the page through the meeting, because people are often added during it. While the meeting is in session it rests closed to one line, with **Show the list** beside it.

How votes count

While the meeting is a draft, **How votes count** at the top of the card offers two choices. Press **Save how votes count** after changing it. It is locked once the floor is open.

- **One vote per person** (the default): everyone on the list votes for themselves.
- **One vote per address**: for an association that votes by home. Several people can be listed for one address, such as a couple, or several owner families of one house, and each motion takes one vote from that address: the first of them to vote on it casts it. Under **What do you call each one?** you can use your own word, such as Unit, Lot or Household, and every screen and email uses it.

Add people (one vote per person)

1. In **Paste one person per line**, paste or type one person per line: the email address, then a comma or a tab, then the name if you have it. A spreadsheet copied as two columns, email then name, works. Lines without an email are skipped and counted: **1 line skipped, no email.**
2. The help line counts what is ready, for example **212 rows ready.**
3. Press **Append** to add these people to the list, or **Replace** to make this the whole list. Replace asks first: **Everyone you added before is removed. People who already checked in stay.** A notice reports the result, such as **212 added, 212 on the list.**

The table under the box shows **Name**, **Email**, **Label**, **Checked in** (the time, or a dash) and a **Remove** button. A person who has checked in cannot be removed: they are part of the record. If the same address appears twice in what you paste, the last line wins.

> GOOD TO KNOW
>
> You can paste up to 2,000 lines at a time, and a list holds up to 5,000 people. Once the floor is open, the list cannot grow past the band the meeting was priced for: **This meeting was priced for up to 400 attendees. Contact support to raise the band.**

One vote per address

The card shows the list by address, with the people who may vote for each address underneath, and a search box for an address, a name or an email. An address is **represented** once anyone listed for it is checked in.

- **Load the list:** press **Paste the list** and paste rows copied out of your spreadsheet, the address, then the email or emails, then the names. Several rows for one address share its vote, and a cell holding two email addresses gives both people the address. Press **Add to the list**. Lines with no email are left out and counted.
- **Add a person:** press **Add a person**, type the email and, if you have it, the name, then start typing the address and pick it from the suggestions. The suggestions come from the meeting's own list; a new address is only added if you choose **Add "…" as a new address**, because it adds a vote. If the email already votes for another address, the form says so: the person then votes for both, one ballot each.
- **A proxy:** under **They are**, choose **A proxy, voting on behalf of this address** and fill in **Appointed by**. The proxy shares the address's one vote: whoever votes for it first on a motion casts it. Once the floor is open, the form also offers to email the person the link, saying who added them, and to tell the people listed for the address who their proxy is.
- **Take someone off: Remove** beside their name. Someone who has already voted for that address stays: they are part of the record.

The record shows each person added or removed, by whom, and for a proxy who appointed them. **Poll book** in the header downloads who voted for each address on each motion, and when; it never holds how anyone voted.

Send the link

Once the floor is open, press **Send the link to everyone on the list** (**Each person gets an email with the link and how to check in.**). A notice confirms **Queued 212 invitations**. The email is handed to the email provider under your organization's name. Once anyone has checked in, the button becomes **Send the link to the 165 not checked in**, so a reminder during the meeting goes only to the people who are not there yet. People who joined by checking in (on a meeting open to anyone) are not emailed. On a meeting that votes by address, the email names the address each person votes for. The email is shown in What attendees see.

A meeting open to anyone with the link

On a meeting that admits anyone with the link, the card instead says **Anyone with the link can check in**: **Share the attendee link above, on a slide or in the meeting notice.** and either the passcode or **Attendees check in with their name and email.** There is no list to manage and no invitation email. Share the link yourself. Once the number of people who have checked in reaches the band the meeting was priced for, new people are turned away with a message.

The floor: quorum, call to order, adjourn

The card **The floor** appears once the floor is open. Its large number is how many attendees are checked in right now, such as **47 present**. If you set a quorum target, a line under it compares the two: **of target 43: quorum met**, or **of target 43: short by 5** in amber. Someone who signs out on their phone stops counting as present until they check in again.

> GOOD TO KNOW
>
> On a meeting that votes by person, the quorum line is a head count of people checked in to this screen. On a meeting that votes by address, the large number is addresses represented, such as **118 of 292 addresses represented**, with the people checked in underneath, and the quorum target is a number of addresses; an address counts once anyone listed for it, or its proxy, is checked in. Neither counts people in the room who have not checked in, or weights, and neither decides whether your meeting has a quorum under your bylaws. That remains the chair's call.

Call to order	Press **Call to order** when the meeting begins. The status changes to **In session** and the card shows **Called to order at 7:02:15 PM**. You can put motions to a vote before this, for example to collect votes from people who check in early.
Adjourn	Press **Adjourn** to end the meeting. It asks **Adjourn the meeting?** with **Attendees can no longer vote once the meeting adjourns. The record stays.** If a vote is still open, you are told **Close the open vote before adjourning.** After adjourning, the card shows **Adjourned at 9:14:08 PM**.
Cancel meeting	In the header, before the meeting is called to order. It asks **Cancel this meeting?** with **Attendees will no longer be able to check in. The record stays.** Press **Cancel the meeting** or **Keep it**.
Delete draft	In the header, while the meeting is a draft. It asks **Delete this draft?** with **The meeting, its list and its queued motions are removed. This cannot be undone.**

> TIP
>
> Adopting a motion to adjourn does not end the meeting on screen. When the assembly adjourns, close any open vote and press **Adjourn** on the floor card.

Make a motion and put it to a vote

The card **Make a motion** is where the chair states each motion as it is made from the floor.

Field	What it does
Kind of motion	A list grouped as Main motions, Subsidiary motions, Privileged motions, Incidental motions and Motions that bring a question back. Under it, one sentence says what adopting the motion does. Picking a kind sets the vote it needs. The full list is in Motion reference.
The motion	The words of the motion, as you will put it (**State the motion as the chair will put it**). Up to 500 characters. For an appeal or an objection, a line also shows the question put to the assembly.
Moved by, Seconded by	Optional names for the record. For a motion that needs no second, the second box is replaced by **This motion needs no second.**
Vote needed	**Majority**, **Two-thirds** or **Three-quarters**.
Counted against	**of votes cast**, **of members present** or **of eligible members**. See How a motion is decided.
Considered only if this motion is adopted	Appears once other motions exist. Pick an earlier motion to make this one conditional on it, or leave it at **Not conditional**.

Under the rule fields, a line spells the rule out: **Adopted by majority of votes cast.** If you change the vote needed from the default, it adds, for example, **Robert's Rules says majority for this kind; your bylaws may differ.**

Then choose one of two buttons:

- **Put it to a vote now** makes the motion and opens its vote at once. A notice says **Motion 1 is on the floor. The vote is open.** This button needs an open floor.
- **Add to the queue** saves the motion to vote on later (**Motion 1 queued.**). On a draft, this is the only choice: **Open the floor first to put a motion to a vote. You can queue motions now.**

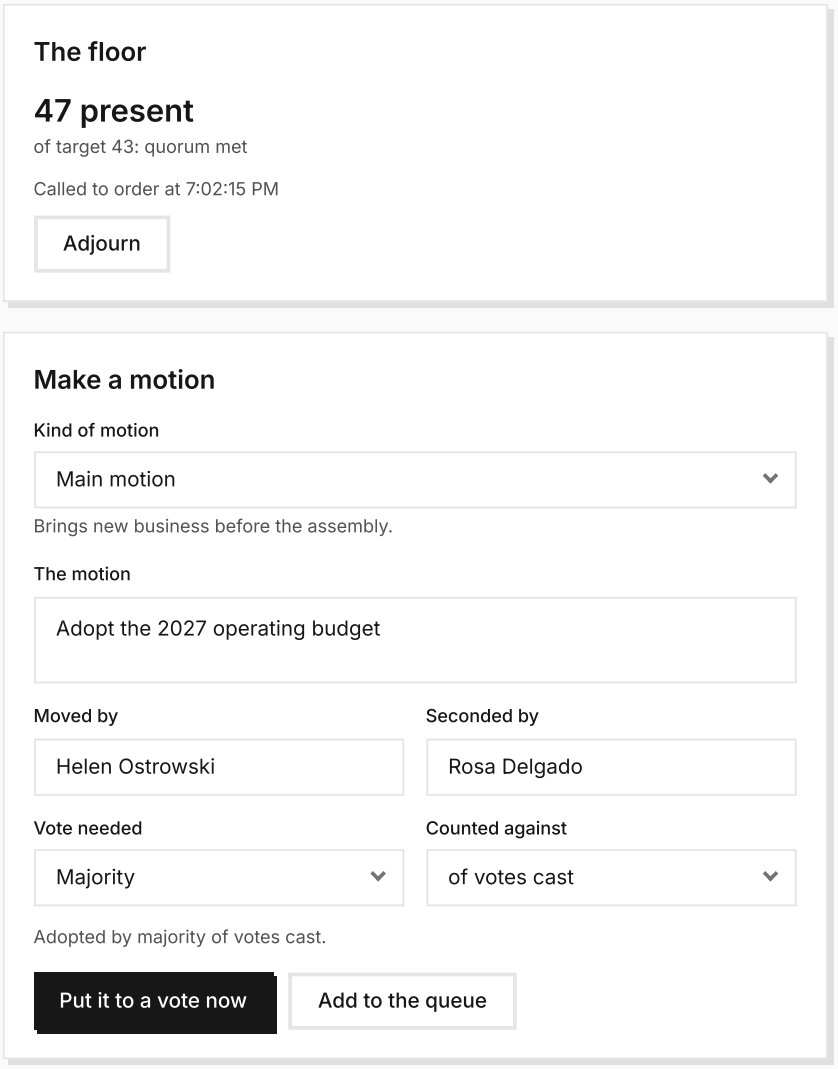


FIGURE 16.3 The floor card once the meeting is in session, and the first motion being made: the budget, moved by the Treasurer and seconded, to be adopted by a majority of votes cast.

The motion card and its states

Every motion appears under **Motions**, newest first. Its card shows **Motion 1**, the kind, a status, the words of the motion, who moved and seconded it, and the rule (**Adopted by majority of votes cast.**).

Status	What you can do
Queued	**Open vote** (once the floor is open), **Edit** (the words, the movers, the vote needed and what it is counted against) and **Remove**. A conditional motion says **Considered only if Motion 1 is adopted.** A motion that another motion depends on cannot be removed: **Another motion depends on this one. Change that first.**
Vote open	The card gets a black border and a live count in three boxes: **Yes**, **No** and **Abstain**, with a line such as **39 of 47 present have voted. Opened at 7:31:40 PM.** Press **Close the vote** to decide it, or **Withdraw**.
Adopted or Rejected	The vote is closed. The card shows the result sentence and when the vote opened and closed. A decided motion cannot be withdrawn.

Status	What you can do
Withdrawn	Taken off the floor before or during its vote. Ballots already cast stay in the record.

Only the console shows the running count. Attendees never see a tally while a vote is open, only the result once you close it. More than one vote can be open at the same time, and attendees see each one.

When you press **Close the vote**, the vote stops, the count is taken and the result is worked out. A notice says, for example, **Motion 1 adopted** with the result sentence. **Withdraw** asks first: on an open vote, **The vote stops. Ballots already cast stay in the record.**

A conditional motion can be opened only after the motion it depends on was adopted. Otherwise you see, for example, **Motion 1 has not been decided yet. This motion is considered only if it is adopted.** or **Motion 1 was not adopted, so this motion is not considered.**

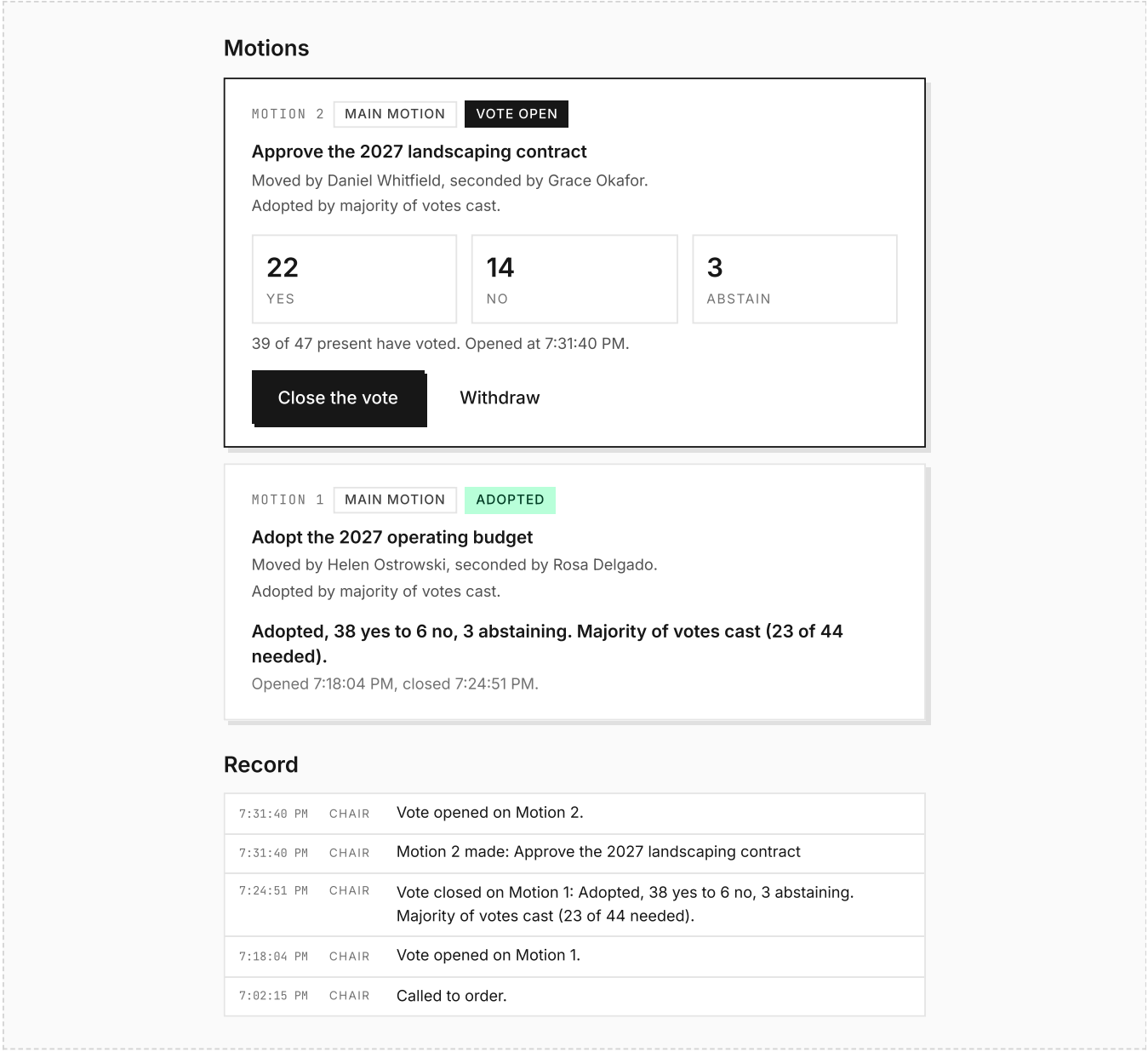


FIGURE 16.4 Two motions on the console: the second with its vote open and a live count only the chair sees, the first closed with its result sentence. Below them, the start of the record, newest first.

How a motion is decided

When you close a vote, vote.direct applies the rule you chose to the count and writes one sentence for the record, the attendees and the spreadsheet. All of them use the same calculation, so they always agree.

Majority	More than half.
Two-thirds, Three-quarters	At least two-thirds, or at least three-quarters.

of votes cast	The share is of the yes and no votes. Abstentions do not count either way. This is the usual rule.
of members present	The share is of the people checked in when the vote closed (or of the yes and no votes, if there are more of those than people still checked in). An abstention, or a person who did not vote, works like a no.
of eligible members	The share is of everyone on your list, present or not. On a meeting open to anyone with the link, it is of everyone who has checked in so far.

The sentence reads, for example, **Adopted, 38 yes to 6 no, 3 abstaining. Majority of votes cast (23 of 44 needed).** If nobody voted yes or no, it ends with **No votes were cast.** and the motion is rejected. On an appeal of the chair's ruling, the question put is **Shall the decision of the chair be sustained?** and a tie sustains the chair.

The record and the spreadsheet

The section **Record** at the bottom of the console lists what happened, newest first: the time, who acted (**chair**, **attendee** or **system**) and one line, such as **The floor opened, free.**, **List updated: 212 added, 212 on the list.**, **212 invitations sent.**, **Called to order.**, **Motion 1 made: Adopt the 2027 operating budget**, **Vote opened on Motion 1.**, the result line and **Adjourned.** Check-ins are not listed there. On a list meeting, the time each person checked in is on the list table instead. The record shows the most recent 200 lines.

Download CSV saves a spreadsheet with one row per motion, ready to paste into your minutes. Its columns are Motion, Kind, Text, Moved by, Seconded by, Rule, Status, Opened, Closed, Yes, No, Abstain, Present, Needed, Outcome and Record line. Times are in the meeting's time zone. The file is named after the meeting, such as `annual-meeting-of-the-members-motions.csv`.

> GOOD TO KNOW
>
> Votes are anonymous. The console shows who checked in and the counts, never how anyone voted. That is also what attendees are told on their screen.

What attendees see

Attendees open the link on a phone or computer, from your email or from a slide or notice where you show it. The page is a single column made for a phone. At the top are your organization's name in small capitals, the meeting's title and its date and time. At the bottom is the line **Your vote is anonymous. The record shows that you voted, never how.**

Check in

1. The card **Check in** asks for an email address. On a list meeting it says **Use the email address the organization has for you. We will email you a six-digit code.** On a meeting open to anyone it also asks for **Your name (optional)**, and, if you set one, the **Meeting passcode** (**The chair shows it in the room.**).

2. They press **Send my code**. An email with the subject **Your verification code from Longleaf Ridge Homeowners Association** brings a six-digit code.
3. On **Enter your code** (**We emailed a six-digit code to thao.nguyen@example.com. It works for 15 minutes.**) they type the code in **Six-digit code** and press **Verify**. **Send a new code** and **Use a different email** are underneath.

Once checked in, they stay checked in on that device until they press **Sign out** at the bottom of the page or the meeting ends. Checking in on a second device signs the first one out.

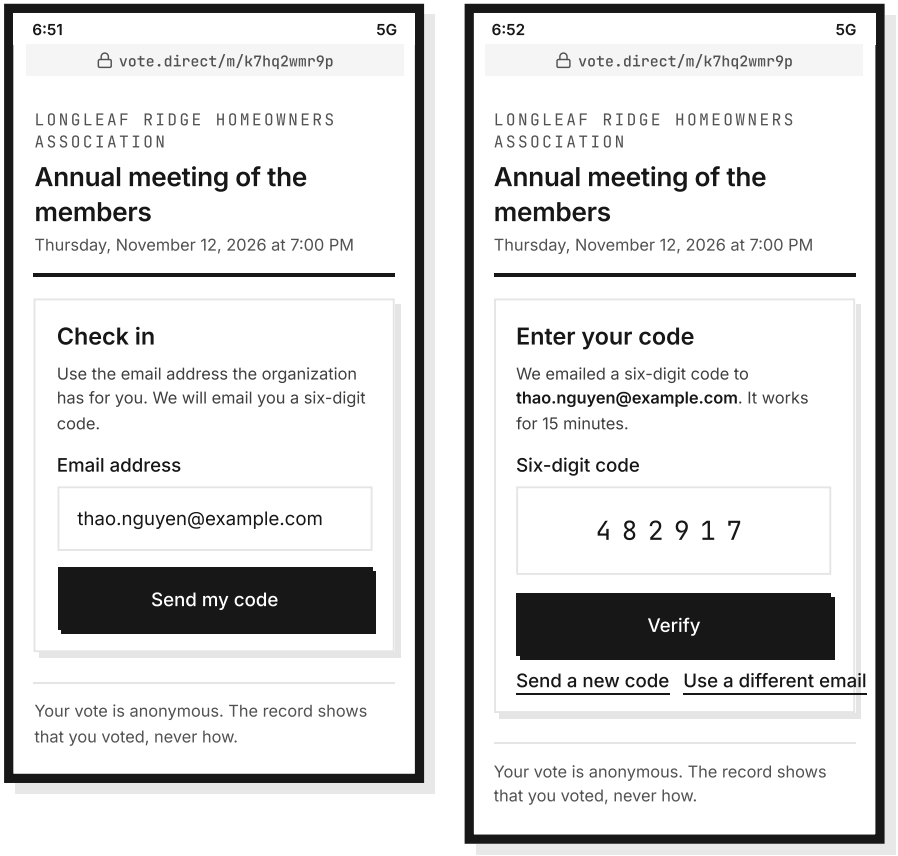


FIGURE 16.5 An attendee checking in on a phone: the email address the association has on its list, then the six-digit code from the email.

Waiting, voting and results

- **Waiting:** a card with the meeting's status, **You are checked in as Thao Nguyen.** and **The chair has not opened a vote yet. Keep this page open.** If you have queued motions, it adds **2 motions waiting**.
- **Voting:** when you open a vote, the motion appears on each checked-in phone by itself, with no reload: **Motion 1 · Main motion**, the words of the motion, who moved and seconded it, **Vote needed: Majority of votes cast.** and three large buttons, **Yes**, **No** and **Abstain**. One press casts the vote.
- **After voting:** the buttons are replaced by **Your vote on this motion is recorded.** A vote cannot be changed.
- **One vote per address:** the waiting card names the address the person votes for, and any address they hold as proxy. Each motion shows one ballot per address, headed **Your vote for 4842 Holland Creek Ridge Rd**. Once anyone has voted for that address on the motion, the others listed for it see who voted and when

instead of the buttons, never how.

- **Results:** under the heading **Decided**, each closed motion shows **Adopted** or **Rejected** and the result sentence. The latest 12 are shown.
- **The end:** after you adjourn, the page says **The meeting adjourned at** with the date and time, and keeps the Decided list. A canceled meeting says **This meeting was canceled.**

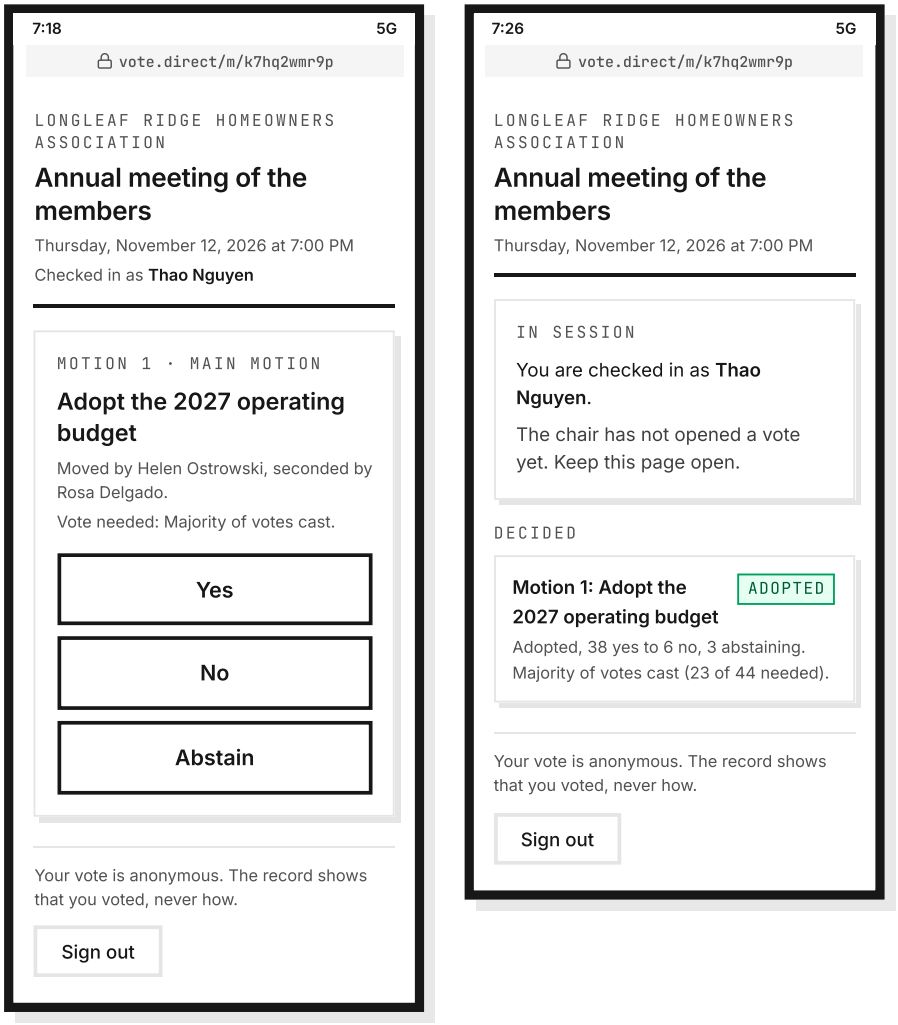


FIGURE 16.6 On the left, the budget motion is open and the attendee chooses Yes, No or Abstain. On the right, after the chair closed the vote: the attendee is waiting for the next motion and the result is listed under Decided.

Messages attendees may see

When	Message
The address is not on your list	**That email address is not on the list for this meeting. Ask the organization to add you, then try again.**
The floor is not open yet	**This meeting is not open for check-in yet.** The page adds **Keep the link. It will work once the organization opens the floor.**
Wrong or missing passcode	**That passcode is not right.** or **Enter the meeting passcode.**

When	Message
Wrong code	**That code is not right. Check the email and try again.** After five wrong tries: **Too many tries. Ask for a new code.**
Code too old	**That code has expired. Ask for a new one.**
Too many codes requested	**Several codes were sent to that address already. Use the latest one, or wait fifteen minutes and ask again.**
The meeting is full	**This meeting has reached the number of attendees it was set up for. Ask the organizer to add you.**
The chair closed the vote first	**The chair closed this vote.**
The connection drops	**Reconnecting** at the bottom of the page, or **We could not reach the server. Check your connection and try again.**
A mistyped link	**That link is not one of ours**, **Check the link you were given and try again.**

The invitation email

When you press **Send the link to everyone on the list**, each person on your list gets this email. Its subject is the meeting's title followed by **your link to the meeting**.

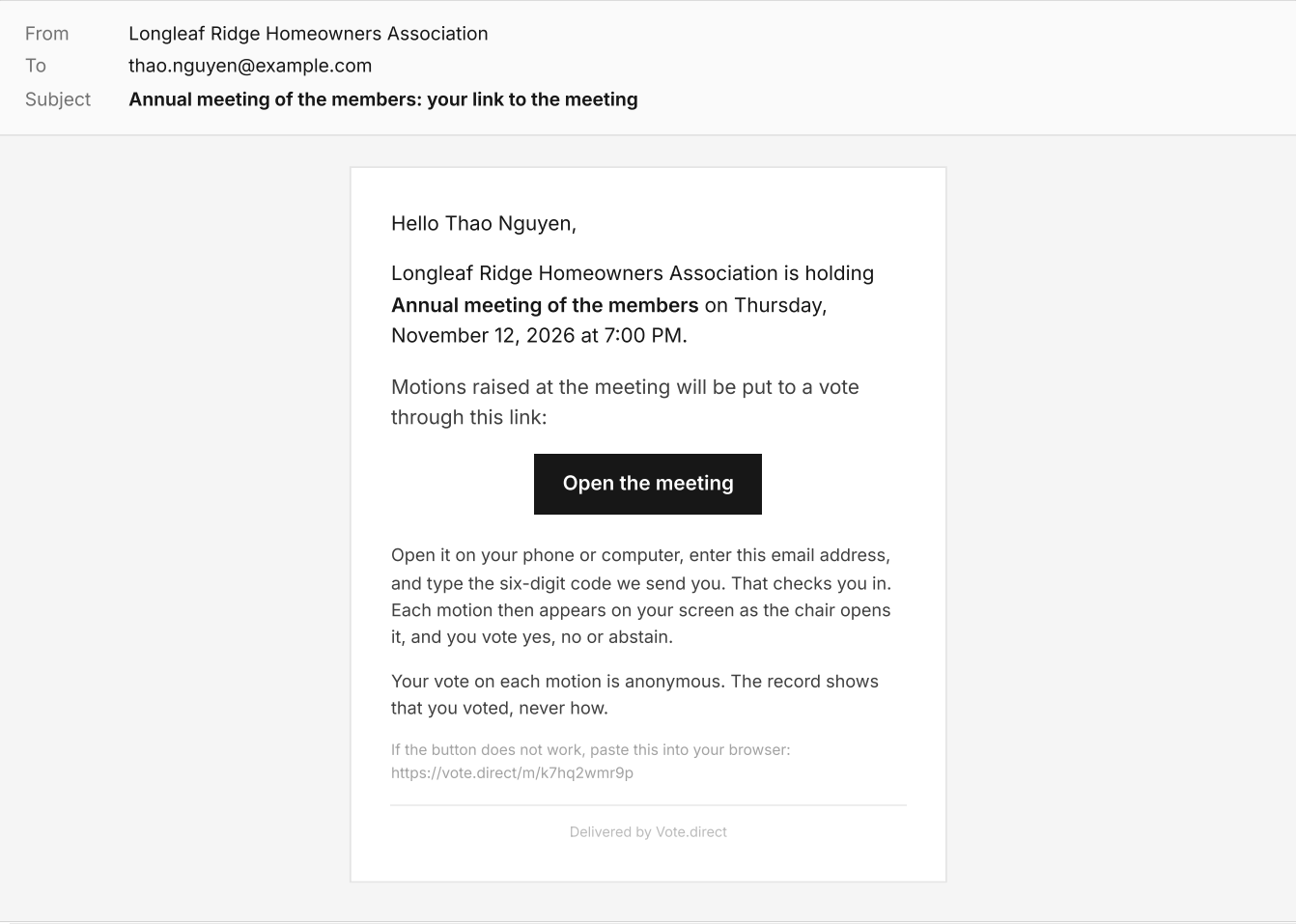


FIGURE 16.7 The invitation each person on your list receives: the meeting, the button that opens the attendee page, and how check-in works.

Statuses and limits

Status	What is true	How it gets there
Draft	Nothing is charged. Nobody can check in. You can build your list and queue motions.	You create the meeting.
Floor open for check-in	Attendees can check in. You can send the link and open votes.	You press **Open the floor** and the price is settled.
In session	The meeting is running.	You press **Call to order**.
Adjourned	No more check-ins or votes. No new motions. The record, the motions and the spreadsheet stay.	You press **Adjourn** with no vote open.
Canceled	Attendees can no longer check in. The record stays.	You press **Cancel meeting** before calling to order.

What	Limit
People on a list	Up to 5,000, and no more than the band the meeting was priced for once the floor is open.
Lines in one paste	Up to 2,000.
Meeting title	Up to 200 characters.
Words of a motion	Up to 500 characters.
Names for moved by and seconded by	Up to 160 characters.
Passcode	4 to 32 characters, typed exactly.
Check-in code	Six digits, good for 15 minutes and 5 tries. Up to 5 codes to one address in 15 minutes.
Staying checked in	On one device at a time, until the attendee signs out.
Decided motions on an attendee's phone	The latest 12.
Lines in the console record	The most recent 200.
Self-serve size	Up to 5,000 attendees. Larger meetings are quoted individually.

What the console does not do

So that nothing surprises you on the night, here is what the console does not offer today:

- **No editing after you create the meeting.** The title, date and time, time zone, expected attendance, check-in method, passcode and quorum target cannot be changed on screen. If one is wrong while the meeting is still a draft, delete the draft and create it again.
- **No meeting description or motion details.** There is a field for the words of each motion, but no field for a longer description of the meeting or background text under a motion.
- **No changing a motion's kind after it is made,** and no changing which motion it depends on. Remove the queued motion and make it again.
- **No checking someone in by hand.** Every attendee checks in on their own device with an email code. A member without a phone or email in the room cannot be added to the count from the console.
- **No proxies on a meeting that votes by person.** Proxies are recorded against an address, so they need a meeting that votes by address (see Who can vote).
- **No labels or weights from the screen.** The list table has a Label column, but the paste box takes only an email and a name, so labels and weighted votes cannot be set from the console. Every member has one vote.
- **No minutes document.** The console produces the record and the spreadsheet. Write your minutes from them.

Motion reference

These are the motions in the **Kind of motion** list, in the list's order, with what adopting each one does and the vote it starts with. The defaults follow Robert's Rules of Order. You can change the vote needed for any motion when you make it, for example where your bylaws set a different vote.

Kind of motion	What it does	Second	Default vote
Main motions			
Main motion	Brings new business before the assembly.	Needed	Majority
Other motion	Anything the catalog does not name. The chair sets the vote it needs.	Needed	Majority
Subsidiary motions			
Amend	Changes the wording of the pending motion.	Needed	Majority
Refer to a committee	Sends the pending question to a committee.	Needed	Majority
Postpone to a certain time	Puts the pending question off to a later time or meeting.	Needed	Majority
Postpone indefinitely	Kills the pending main motion for this session without a direct vote on it.	Needed	Majority
Limit or extend limits of debate	Caps or extends how long, or how many times, members may speak.	Needed	Two-thirds
Previous question (close debate and vote now)	Ends debate immediately and puts the pending question to a vote.	Needed	Two-thirds
Lay on the table	Sets the pending question aside temporarily for something more urgent.	Needed	Majority
Privileged motions			
Recess	Takes a short break; business resumes where it left off.	Needed	Majority
Adjourn	Closes the meeting. (On screen, the chair still presses **Adjourn**.)	Needed	Majority
Fix the time to which to adjourn	Sets the time of an adjourned meeting that continues this one.	Needed	Majority
Incidental motions			
Appeal the decision of the chair	Lets the assembly overrule a ruling of the chair. The question put: Shall the decision of the chair be sustained? A tie sustains the chair.	Needed	Majority
Suspend the rules	Sets aside a rule of order for one purpose.	Needed	Two-thirds
Objection to the consideration of a question	Keeps an original main motion from being considered at all. The question put: Shall the objection be sustained, so the question is not considered?	Not needed	Two-thirds

Kind of motion	What it does	Second	Default vote
Division of the question	Splits a motion into separate questions voted on one at a time.	Needed	Majority
Withdraw a motion	Lets the maker take back a motion the chair has already stated, when a member objects.	Not needed	Majority
Motions that bring a question back			
Reconsider	Reopens a question already voted on at this meeting.	Needed	Majority
Rescind or amend something previously adopted	Undoes or changes a decision from an earlier meeting.	Needed	Two-thirds
Take from the table	Brings back a question that was laid on the table.	Needed	Majority

Every default is counted against votes cast. Motions the chair decides alone, such as a point of order, are not in the list, because the floor does not vote on them.

CHAPTER 17

Announcements

Write an email to everyone in your contacts, to a group, or to a few people, and send it now or at a time you choose. This chapter covers what you need first, the three steps of the composer, the delivery history and what your members receive.

IN THIS CHAPTER

- What you need before you start
- When something is missing
- Who can receive an announcement
- The Announcements page
- Step 1: choose the recipients
- Step 2: write the email
- Step 3: send now or schedule
- Test, review and send
- Drafts
- Delivery history
- What your members receive
- Limits

What you need before you start

Open **Announcements** in the menu at the top of your dashboard (`vote.direct/dashboard/announcements`). Sending an announcement needs three things, all at once:

1. **You are an owner or an admin** of the organization. Editors and viewers cannot send announcements (see Team and roles).
2. **Your organization has a plan that includes announcements.** Announcements come with a Governance Center plan (see Governance Center). vote.direct no longer sells plans of its own. If you already have an annual one, it includes announcements, and a monthly one can switch to annual (see Billing and payments). Paying per election does not include them.
3. **Your organization has a verified sending domain.** Announcements on vote.direct always go out from your own address, such as `board@longleafridge.example` , never from a shared vote.direct address. You set the domain up once under **Settings**, **Sending Domain** (see Settings reference).

On vote.direct, announcements are sent by email only. Text messages for announcements are part of Governance Center (see Governance Center).

When something is missing

When a requirement is missing, the page says which one, and you cannot send until it is met.

What is missing	What you see
You are not an owner or admin	A red bar: **Only an organization owner or admin can send announcements.** Ask an owner or admin to send it for you.

What is missing	What you see
A plan that includes announcements	A box headed **Announcements are part of Governance Center** says what Governance Center includes, with a **See Governance Center plans** button that opens its plans page. If you are on a monthly plan, an offer to switch to annual fills the page instead, built from your own plan and the size of your contact list: the button asks to confirm, the annual price is charged that day and the unused part of the month is credited. Anyone who is not the owner sees **Only the organization owner's account can change the plan.** The prices on the switch offer are the ones your plan would be charged.
A payment problem on the plan	A heading with your plan's name, such as **Your Association plan needs a payment update**, the line **The last payment could not be collected. Update the card in Billing and announcements come straight back.** and an **Update payment method** button that opens Billing.
A verified sending domain	An amber box, **Verify a custom domain to send announcements**, with a **Set up your sending domain** button. The composer shows below it, grayed out, and nothing in it can be used until the domain is verified.
Announcements turned off for your account	**Announcements are disabled for this account** and **Contact support if you believe this is a mistake.**
No organization	**No organization selected** and **Create or join an organization to send announcements.**

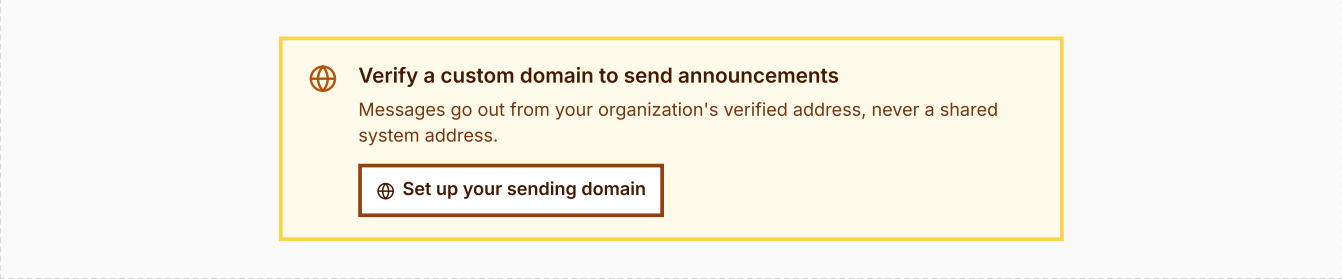


FIGURE 17.1 What the page shows when your organization has a plan that includes announcements but no verified sending domain yet. The button opens Settings, Sending Domain.

Who can receive an announcement

Announcements go to the contacts in **People** that have an email address (see Voters and your roster for adding and tagging contacts). Each address is counted once, even if two contacts share it.

- **Groups** are your contact tags. Tag your board, a building or a committee in People, and the tag appears as a group here.
- **People who unsubscribed are left out.** Anyone who pressed Unsubscribe in an earlier announcement is removed from every list and count on this page and does not receive later announcements from your organization.
- **Your plan sets a ceiling.** Under the recipients, the page says **Your plan allows up to 500 recipients.** (with your plan's number). A larger audience is refused until you narrow it or change plan.

The Announcements page

The page is headed **Announcements**, with **Write a polished announcement, choose exactly who receives it, and send by email now or later.** Three small tiles on the right count **Scheduled** messages, emails **Delivered** and emails **Failed** across the messages in your delivery history. A green bar under the heading names the address your messages send from: **Messages send from board@longleafridge.example**.

The composer is one large card with a black title bar. The bar says **Nothing sends until you review and confirm it.** and, once you start typing, shows whether your work is saved (see Drafts) with a **Start a new message** button. Under the bar, a strip counts your progress, such as **2 of 3 steps ready**, says what to do next (for example **Add a subject and write your message.**) and ticks three boxes: **Recipients**, **Email** and **Delivery**. Below the composer is your **Delivery history**.

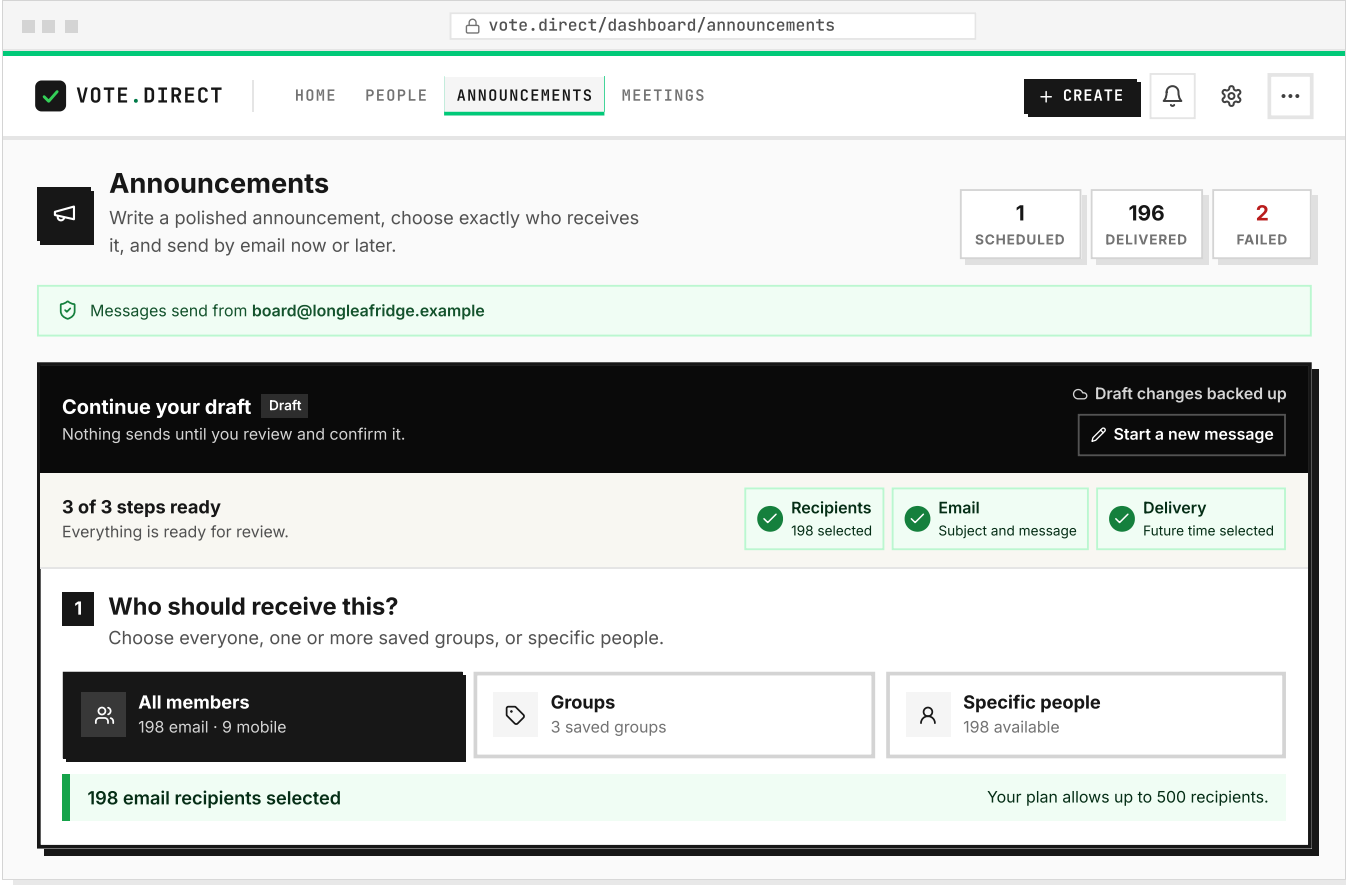


FIGURE 17.2 The Announcements page with a saved draft open: the counts, the sending address, the composer's progress strip and step 1 with All members chosen.

Step 1: choose the recipients

Under **Who should receive this?**, press one of three large buttons. The one you choose turns black.

All members	Every contact with an email address. The button shows how many, such as **198 email · 9 mobile**.

Groups	Your saved groups appear as tiles with their color and number of members. Press as many as you need. Someone in two chosen groups receives one email. With no groups yet, the panel says **No groups yet.** with a **Create a contact tag** link to People.
Specific people	A list of your contacts with a search box (**Search by name or email**). Tick the people you want. **Select shown** ticks everyone the search is showing, and **Clear** unticks everyone.

A bar under the buttons confirms the count, such as **198 email recipients selected**, or asks you to **Choose at least one deliverable recipient**.

Step 2: write the email

Under **Write the email** (**Write naturally, then add formatting, links, photos, or files if needed.**) are the subject, the inbox preview, the message and the attachments.

Start with an outline

While the composer is empty, a blue box titled **Start with a helpful outline** offers four starters: **Meeting reminder**, **Maintenance notice**, **Community update** and **Urgent notice**. Each fills in a subject, a preview line and a message with bracketed spots such as **[Add date]**. Replace every bracketed spot before you send. Nothing is sent automatically.

Subject, preview and message

Subject	Required, up to 200 characters, with a counter such as **24/200**. The example placeholder is **Example: Pool closed this weekend**.
Inbox preview text	Optional, up to 240 characters: **A short summary members see beside the subject line**. It does not appear in the body of the email.
Message	The body of the email, in an editor with a toolbar. Paste or drag a photo straight into it. The footer counts your words.

Toolbar control	What it does
Normal text, Large heading, Small heading	The style of the current line.
Bold, Italic, Underline, Bulleted list	Icon buttons for the selected text.
Add or edit link	Opens a **Link address** box. Type the address and press **Apply link**.
Insert photo	Adds a photo where your cursor is. JPEG, PNG or GIF, each under 8 MB, up to 12 in one message.

Toolbar control	What it does
More tools	Opens a second row, **More formatting**: text size (**Small text**, **Normal size**, **Large text**, **Extra large**), Strikethrough, Text color, Highlight color, Numbered list, Quote, Align left, Align center, Align right, Clear formatting, Undo and Redo. **Fewer tools** closes it.

File attachments

The dashed box **File attachments** (**PDF, Word, Excel, PowerPoint, CSV, text, or image · 18 MB total**) takes files you press **Attach files** for, or drag onto it. Each file shows its name and size with a remove button, and a line counts them, such as **1/10 files · 214 KB of 18 MB**. Attachments go with the email as real files.

> GOOD TO KNOW
>
> Up to 10 files, each under 12 MB, and 18 MB in total. A file is refused if its type is not one of those listed, or if its contents do not match its type: **The file contents do not match the selected file type.**

Preview the email

Press **Preview the email** to see the message as members will: a header with **From** (your organization and address), **To** (the number of recipients) and **Subject**, then your organization's name, the subject as a heading, your message, the attachments and the unsubscribe line. Press **Return to editing** to go back.

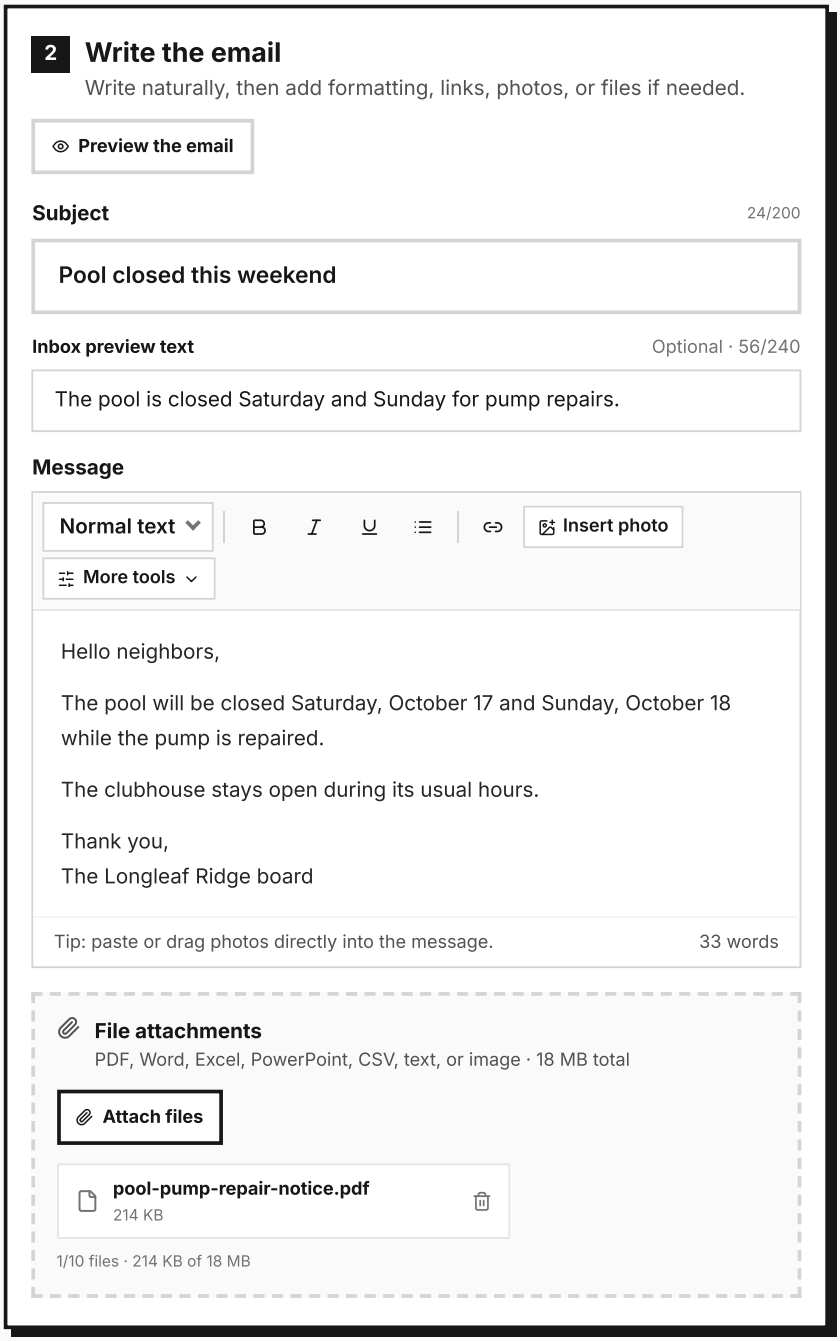


FIGURE 17.3 Step 2 for Pool closed this weekend: the subject, the inbox preview line, the message with its toolbar, and one PDF attached.

Step 3: send now or schedule

Under **When and how should it send?** you choose the time and the pace.

Send time

- **Send now** (**Starts after confirmation**) starts sending as soon as you confirm.

- **Schedule** (**Choose a future time**) opens a panel with three shortcuts, **In 1 hour**, **Tomorrow at 9 AM** and **Next Monday at 9 AM**, and a **Date and time** field. The time is in your computer's time zone, shown under the field, such as **America/New_York**. It must be in the future.

Delivery pace

Messages are handed to the email provider one after another, spaced out so that inboxes are less likely to treat a burst of mail as spam. The footer estimates how long handing them all over takes, such as **Steady delivery · About 4 minutes**.

Pace	Speed	When to use it
Gentle	About 20 per minute	Extra spacing for very large lists.
Steady (Recommended)	About 60 per minute	A good balance of speed and deliverability. This is the default.
Fast	About 240 per minute	For urgent, time-sensitive notices.

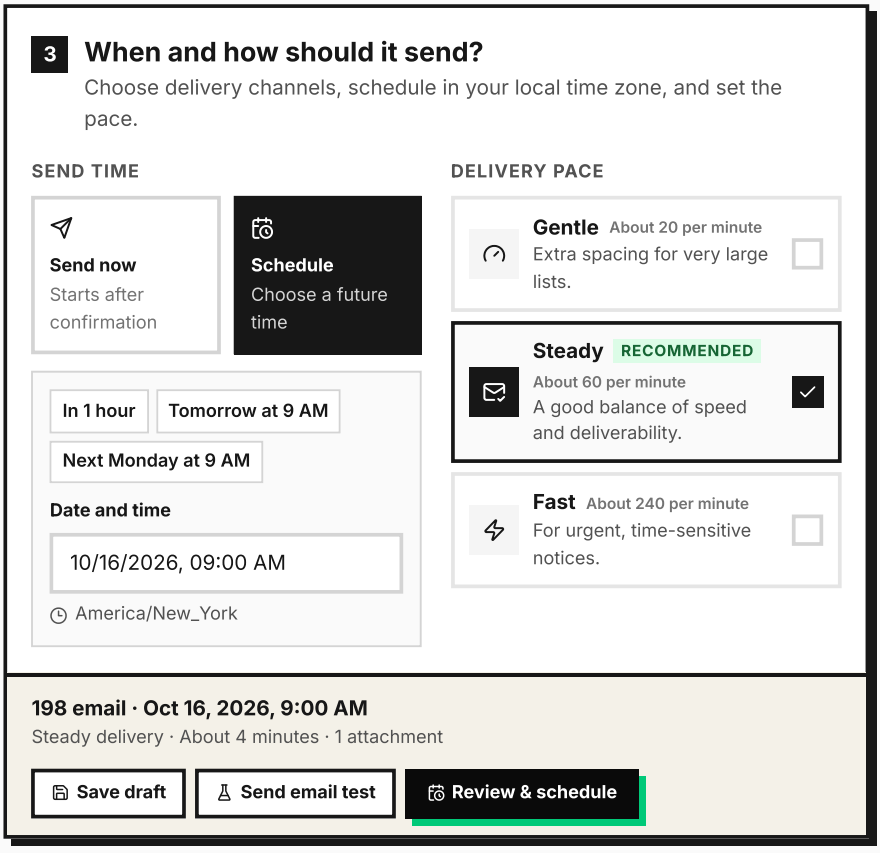


FIGURE 17.4 Step 3 with the announcement scheduled for Friday morning at the Steady pace, and the bar of buttons at the foot of the composer.

Test, review and send

A bar at the foot of the composer stays in view as you scroll on a wide screen. Its first line sums up the send, such as **198 email · send now**. Its second line gives the pace and time estimate, or, if something is still missing, what to do next. It holds three buttons.

Save draft	Saves the message to your account without sending it. See Drafts.
Send email test	Sends the message, with its attachments, to your own sign-in address only. The subject starts with **[Test]**. A notice confirms **Test email sent to priya@longleafridge.example.** It needs a subject and a message.
Review & send	Named **Review & schedule** when you chose Schedule. It stays gray until all three steps are ready, and then asks you to confirm.

> TIP
>
> Always send yourself a test first. Open it on your phone, check the photos and links, open each attachment, and read it once more for the bracketed spots a starter leaves behind.

The confirmation names exactly what will happen. For a send now: **Send to 198 members?** with **"Pool closed this weekend" will begin sending now and cannot be unsent. 1 file will be attached.** and the buttons **Cancel** and **Send announcement**. For a scheduled send the title is the time, and the button is **Schedule announcement**.

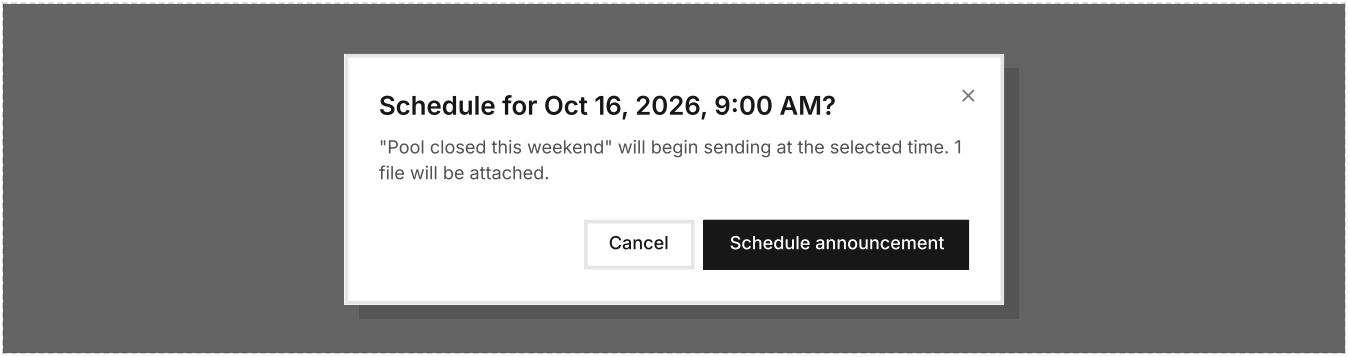


FIGURE 17.5 The confirmation before a scheduled send. Nothing leaves until you press the button that names the action.

After you confirm, a notice reports what was queued: **Sending 198 emails. Live delivery status appears below.** or **Scheduled for Oct 16, 2026, 9:00 AM: 198 emails.** The composer clears, and the message appears at the top of your delivery history. If not one message could be queued, the notice says **No recipient messages could be queued.** and **Nothing was sent. Your message is still on this page.**

Other members of your organization may see a note in their notifications bell when you send or schedule an announcement, and again when sending finishes, depending on their notification settings.

Drafts

The composer protects your work in two ways. The status in the black title bar tells you which one is on.

- **On this device:** as you type, a copy is kept in this web browser (**Saved on this device**). If you leave and come back, the page restores it and says **Recovered your unsent announcement from** with the date and time.
- **In your account:** press **Save draft** (**Draft saved safely. New changes will save automatically.**). The card's title becomes **Continue your draft**, and from then on your changes are saved to your account a moment after you type (**Saving changes...**, then **Draft changes backed up**). If saving pauses, the bar says **Autosave paused, use Save draft**.

Saved drafts appear in the delivery history with an **Edit** button. Press it to open the draft in the composer (**Draft opened. Make your changes, then save or send.**). **Start a new message** clears the composer for a fresh message.

Delivery history

Under the composer, **Delivery history** (**Scheduled, in progress, and completed messages**) lists your messages, newest first, with a count such as **3 shown**. It shows your latest 50. Each row has the subject, a status, the audience (**All members**, the number of groups or the number of individuals), a time, the number of files, and the buttons that apply.

Status	What it means	Buttons
Draft	Saved, not sent. The time reads **Created** with the date.	**Edit**, **Copy**
Scheduled	Waiting for its time. The time reads **Scheduled** with the date.	**Copy**, **Move**, **Cancel**
Sending	Messages are being handed to the email provider.	**Copy**
Sent	Every message was handed over or failed. The time reads **Finished** with the date.	**Copy**
Failed	No message could be handed over.	**Copy**
Cancelled	Canceled before it started sending. The time reads **Cancelled · originally** with the scheduled date.	**Copy**

Messages that have recipients show three numbers on the right:

Delivered	Messages handed to the email provider. It does not mean a message reached an inbox: a member's mail system can still refuse it or file it as spam.
Queued	Messages waiting for their time or being handed over.
Failed	Messages that could not be handed over.

Move or cancel a scheduled send

- **Move** opens a **New date and time** field. Press **Save new time**, or **Keep current time** to leave it. The new time must be in the future.

- **Cancel** asks **Cancel this scheduled announcement?** with **"Pool closed this weekend" will not be sent. This cannot be undone.** The red button **Cancel scheduled send** confirms it. The plain **Cancel** button next to it only closes the question.
- Once a scheduled message has started sending, it can no longer be moved or canceled: you see **This announcement is no longer scheduled.**

Copy a message

Copy puts a new message in the composer with the subject **Copy of** plus the original subject, the same message, the same recipients and any photos in the message. Attached files are not copied: **A new copy is ready. Review the recipients and reattach any files before sending.**

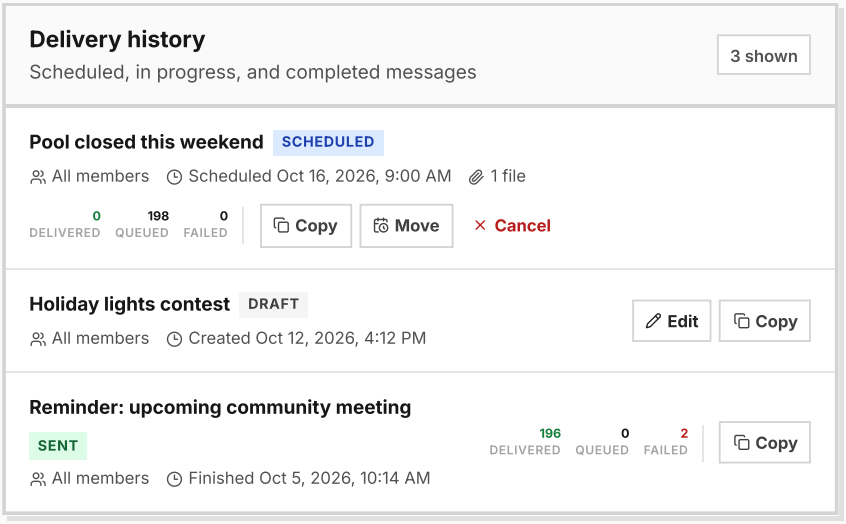


FIGURE 17.6 The delivery history with a scheduled send that can still be moved or canceled, a saved draft, and a finished send with its counts.

What your members receive

Each recipient gets their own copy of the email. It comes from your organization's name at your verified address, with your subject. Many mail apps show the inbox preview text beside the subject. The email itself has your organization's name in small capitals, the subject as a heading, your message with its photos, and any attachments as files.

At the bottom: **You received this announcement from Longleaf Ridge Homeowners Association. Unsubscribe.** Many mail apps also offer their own unsubscribe button for these emails, which works the same way.

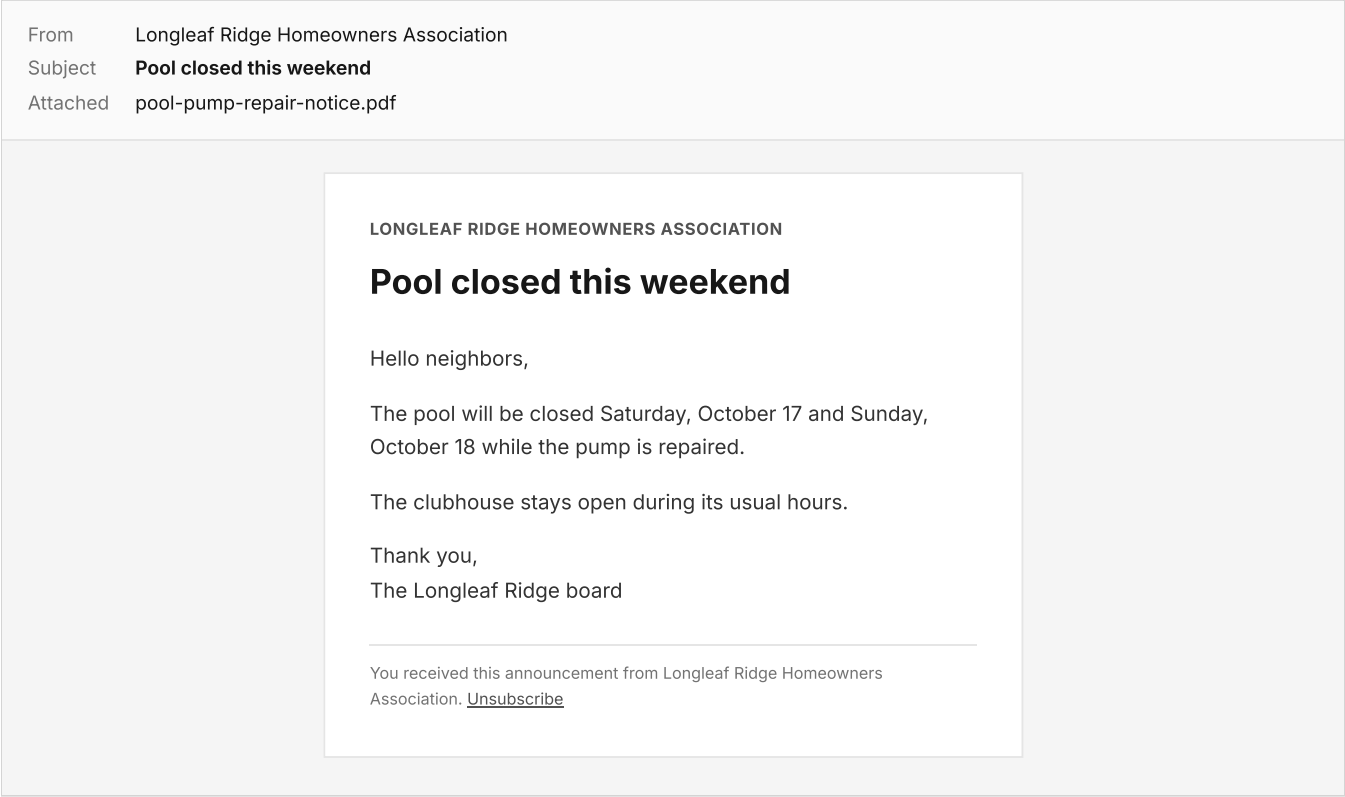


FIGURE 17.7 The announcement as a member receives it, with the attachment as a file and the unsubscribe line at the bottom.

The unsubscribe page

A member who presses **Unsubscribe** sees a short page, **Unsubscribe from announcements?** with **You will stop getting announcements from this community by email.** and an **Unsubscribe** button. Nothing changes until they press it, so a mail system that opens links on its own does not unsubscribe anyone. After they press it: **You're unsubscribed**, **You won't receive any more announcements from this community.** A broken link shows **Link not valid**.

From then on, that address is left out of your recipients and counts on the Announcements page. There is no button on the page to add someone back.

Limits

What	Limit
Who can send	Owners and admins, on a plan that includes announcements, with a verified sending domain.
Channels	Email only on vote.direct.
Recipients per send	Up to your plan's limit, shown under the recipients.
Subject	Required, up to 200 characters.
Inbox preview text	Up to 240 characters.

What	Limit
Photos in the message	Up to 12, each a JPEG, PNG or GIF under 8 MB.
Attachments	Up to 10 files, each under 12 MB, 18 MB in total.
Sends and tests	Up to 10 an hour for each person. Past that: **Too many announcements in a short window. Please wait and try again.**
Scheduled time	Must be in the future, in your computer's time zone.
Delivery history	Your latest 50 messages.
After sending	A message that has started sending cannot be stopped or unsent.

CHAPTER 18

Electronic signatures

Send an agreement you already have, as a PDF, to the people who must sign it. Mark where each person signs, follow who has signed, and keep the finished file with its certificate of completion.

IN THIS CHAPTER

- Where to find signature requests
- The list of signature requests
- Upload a PDF
- Name the signers
- Place the boxes
- Before you send
- Send it, and the one-time links
- Track a document
- The emails
- What your signers see
- The completion record
- Limits at a glance

Where to find signature requests

Signature requests is the part of vote.direct that sends a document for signature. You upload a PDF exactly as it is: a management agreement, a vendor contract, an engagement letter. You mark the places where each person signs, initials or fills something in. Each signer gets a private link, signs on a phone or a computer, and the finished PDF comes back with every signature on it.

- **On vote.direct** there is no menu link to it today. Type the address into your browser: `vote.direct/dashboard/signatures`. Bookmark it if you use it often. The emails vote.direct sends you about a document also link straight to that document.
- **On Governance Center** open **Records** in the menu, then the **Signature requests** tab. See Governance Center.

Only the owner or an admin of the workspace can use it. Anyone else who opens the page sees the message "Not an administrator of this organization". Signature requests belong to one workspace: the page lists the documents of the workspace you are working in, and nothing from your other workspaces.

There is no separate charge. The page says it in its own words: "Nothing here costs anything. Signing is included with your account."

> GOOD TO KNOW
>
> This is not the same thing as the **Electronic signature** setting on an election. That setting asks voters to type their full legal name and address and certify they are the eligible voter before casting. It belongs to the election. This chapter is about signing documents.

The list of signature requests

The first time you open the page there are no documents yet. You see one card, **Send a PDF for signature**, with a button, **Upload a document**, and three short notes about what comes back.

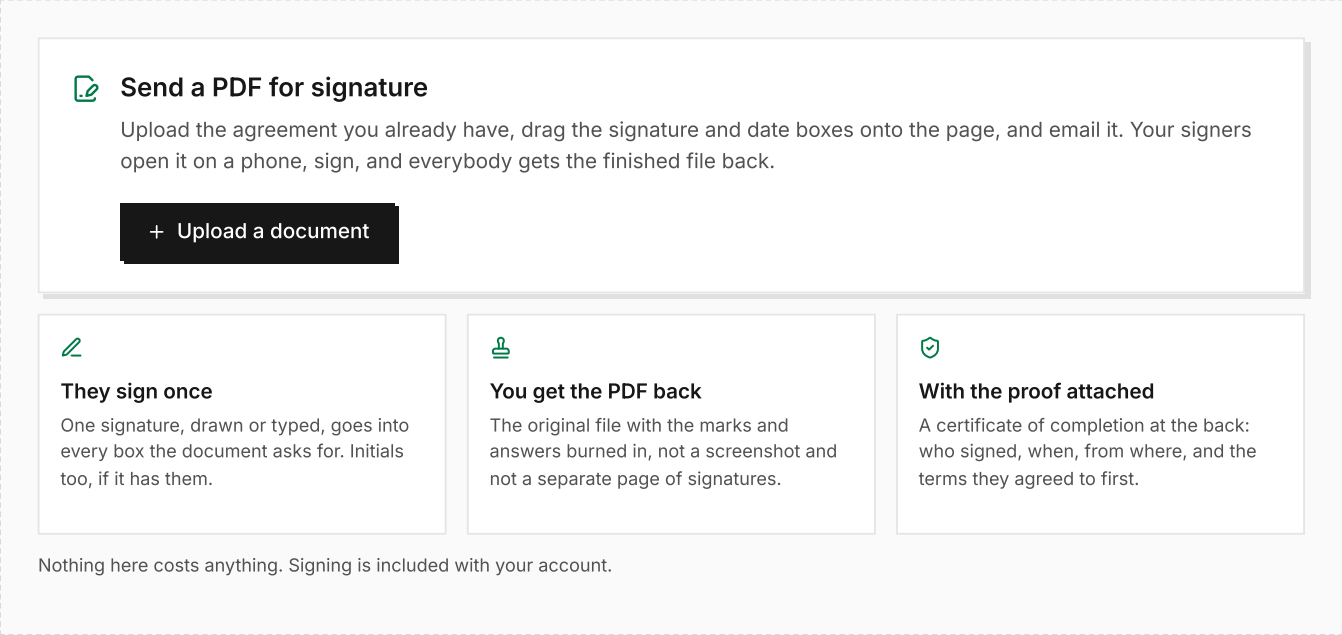


FIGURE 18.1 The page before your first document: one button to start, and what you get back.

Once you have documents, the page shows the heading **Signature requests**, a **New document** button, a row of filter buttons and the documents themselves.

- The filters are **Waiting on others**, **Completed**, **Drafts**, **Declined** and **All**, each with a count. **Declined** appears only when someone has declined something. The page opens on **Waiting on others** when anything is waiting, and on **All** otherwise.
- The document that changed most recently is at the top.
- Each row shows the title, one line that says where the document stands, and a line of details: how many have signed, when it was sent (or started), its due date, and when anything last happened. Hold the pointer over the last part to see the exact date and time.
- A badge on the right sums up the state.
- Click a row to open it. A draft opens straight back into the page where you place the boxes. Anything else opens the document's tracking page.

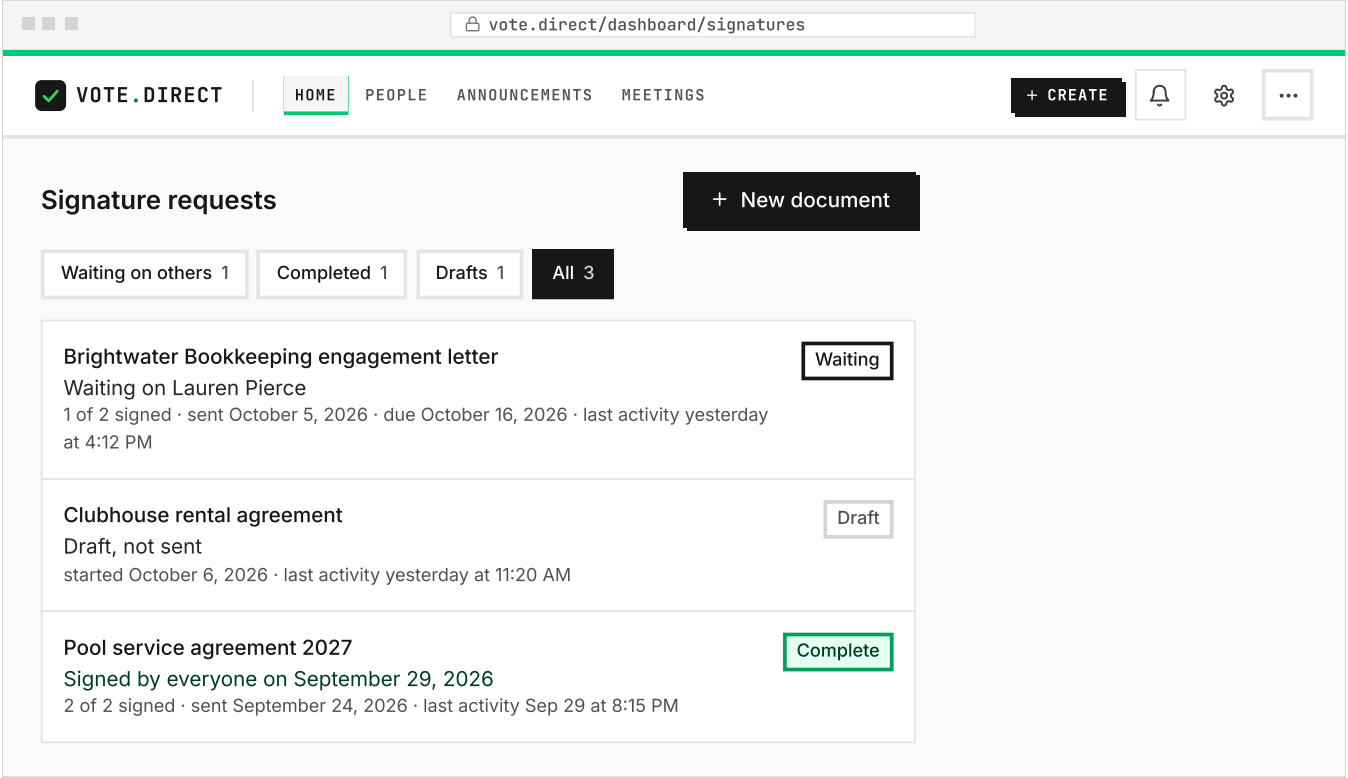


FIGURE 18.2 The list on vote.direct, filtered to All. Each row names who the document is waiting on, and the newest activity is at the top.

Badge	Line under the title	What it means
Waiting	"Waiting on Lauren Pierce", "Waiting on Marcus Bell and Lauren Pierce", or "Waiting on Marcus Bell and 2 others"	Sent, and at least one person still has to sign.
Complete	"Signed by everyone on October 8, 2026"	Everyone has signed. The signed PDF is ready.
Declined	"Declined by Lauren Pierce"	Someone said they will not sign. vote.direct stops asking anyone until you decide what to do.
Draft	"Draft, not sent"	You started it and have not sent it.
Withdrawn	"Withdrawn October 9, 2026"	You took it back after sending it.
Discarded	"Discarded"	You threw away a draft that was never sent.

Upload a PDF

1. Press **New document** (or **Upload a document** on an empty page). The page **Send a document for signature** opens.
2. Drag a PDF onto the box that says **Drop a PDF here, or choose one.** Or press **Choose a PDF** and pick the file.

3 Wait while the file is prepared. The rest of the page appears: the document's name, the people who sign, the pages where you place boxes, and the send options.

One document holds one PDF of up to 25 MB and 200 pages. A file that is not a PDF, is empty or cannot be read is refused with a message, for example "That file is not a PDF." or "That PDF could not be read. Try re-saving it and uploading again." You can upload up to 20 files an hour. Past that you see "Too many uploads. Try again later." The file itself is not changed until it is signed.

The document does a first pass

A fillable PDF (a form with its own boxes built in) opens with those fields already placed. A green note says so, for example: "This PDF is a fillable form, so its 12 fields are already placed. Check who fills each one before you send." When the form has more than one signature block, the note adds that the fields are split between signers by signature block, and the page starts with one signer row per block. Press **Got it** to close the note.

Any other PDF is read for its signature lines. While that happens you see "Looking for signature lines in the document...". The lines it finds are outlined on the page, and a green panel explains, for example: "We found 8 places this document asks to be filled in, in 2 signature blocks. They are outlined on the page below." Press **Add all 8** to place them all, one signature block for each signer in the order your signers are listed, or **Place them myself** to ignore them. Nothing is placed until you press one. If the document has more blocks than you have signers, the panel says it will add rows for you to name. The reader looks for five kinds of box: signature, initials, date signed, name and title.

Saved layouts

Layouts you have saved (see Before you send) are listed on the upload page under **Or start from a saved layout**. Press **Use** to start a new document from the same file and boxes, with empty signer rows for this time's names. The trash button deletes a layout; it changes to **Sure?** and needs a second press. A layout described as "Fields only. Upload the document and they will be applied." has no file kept with it, and its **Use** button is grayed out.

The name, the file and saving

At the top of the page, **What this document is called** starts as the file name. Change it to something your signers will recognize, for example "Brightwater Bookkeeping engagement letter". This name is the subject of every email and the title on the certificate.

Under the name you see the file name, the page count and **Replace the file**. Use it if you picked the wrong file. Boxes on pages the new file does not have are removed. The rest stay where they were.

Your work saves itself a moment after each change. The note on the right reads **Saving...** and then **Saved.** If a save fails it says why, for example "Not saved. Check your connection."

A document you have not sent is a draft. Open it again from the **Drafts** filter. The file, the boxes, the signing order, each signer's name, the due date, the note and the reminder setting come back. Email addresses do not: they are only kept once you send, so type them again before you send.

Name the signers

Under **Who signs**, each row is one person.

Signer name	Required, up to 80 characters. It labels that person's boxes and fills any Name box for them.
Email address	Optional. The invitation is sent here. Leave it blank for someone you will hand the link to yourself, by text or in person.
Title or unit	Optional. It appears after their name in the email greeting and fills any Title box for them, for example "President".

Press **Add a signer** for another row, up to 12 signers. **Add me** fills a row with your own name and email. Once you are on the list the button reads **You are on the list**. The trash button removes a row, and the boxes placed for that person go with it. Hold the pointer over the trash button to see how many boxes that is.

Each person needs their own row and their own boxes. Two people cannot share one set of boxes: if two people must both sign, add both and place boxes for each.

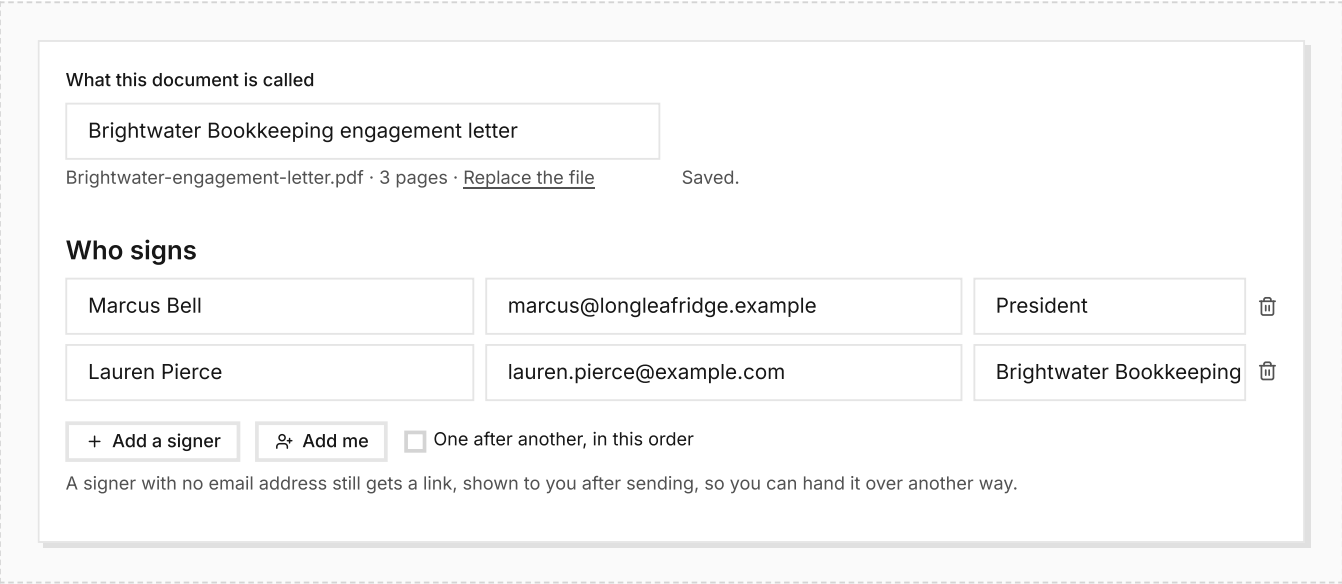


FIGURE 18.3 The document's name and its two signers. The checkbox for signing in order appears once there are two or more rows.

Signing in order

With two or more signers, the checkbox **One after another, in this order** appears. Leave it off and everyone is emailed at once, when you send. Turn it on and only the first person is emailed when you send. Each of the others is emailed when the one above them has signed. On the tracking page the signers are then listed in order, with a number beside each. A later signer can open their link early to read the document, but they cannot sign until it is their turn.

If anyone declines, vote.direct stops asking: no turn emails, no reminders and no new links. The document cannot be completed as it stands.

Place the boxes

Below the signers, the PDF's pages are shown one under another, with a panel on the right (under the pages on a narrow screen). A box is a place where one signer signs, initials or writes something. The boxes are part of what is signed, so they cannot move once you send.

1. If you have more than one signer, pick whose boxes you are placing under **Placing fields for**. That person's boxes are drawn in green. Everyone else's are gray, each labeled with the signer's name.
2. Pick a box type under **Click the page to place**. **Signature** is picked to start with.
3. Click the page where the box goes for a box of the standard size, or drag to draw it at the exact size.
4. Drag a box to move it. Select it and drag the small square at its bottom right corner to resize it.

Box type	Who fills it	Notes
Signature	The signer's adopted signature	The signer adopts one signature, and it fills every signature box that is theirs.
Initials	The signer's initials	A typed signature brings initials made from the signer's legal name. A drawn signature needs drawn initials.
Date signed	Filled in for them	The day they sign, written out ("October 8, 2026") in their own time zone. Never required, because there is nothing for them to supply.
Name	The signer, filled in to start	Starts with the name you typed for them. They can correct it.
Title	The signer, filled in to start	Starts with what you typed under Title or unit.
Text	The signer	Any other answer, up to 300 characters.
Checkbox	The signer	Ticked or not. A new checkbox starts as not required.

The Selected field panel

Click a box, on the page or in the field list, to select it. The panel shows:

Type	Change the box to another type.
Who fills it	Give the box to another signer. Shown only when there are two or more signers.
Label	The words shown inside the empty box, up to 300 characters. On a phone the label is the question the signer is asked. For an initials box it is the statement they initial, and for a checkbox, the sentence they agree to.

Field name (optional)	For Text and Checkbox boxes only. Name two checkboxes with the same start and `_yes` and `_no` (for example `renew_yes` and `renew_no`) and they become one question: ticking either clears the other. Name a run of text boxes on the same ruled answer `_1`, `_2`, `_3` and the signer answers them as one paragraph, which is wrapped back onto the lines. Use lowercase letters, digits and underscores.
Required	Whether the signer must fill the box before they can finish. A Date signed box is never required.

The two small buttons at the top right of the panel duplicate the box (the copy appears below it, or above it when the box is at the foot of a page) and delete it. With nothing selected, the panel reads "Nothing placed yet. Pick a field type and click where it goes on the page." or "Click a field on the page, or in the list below, to change it."

Initials on every page

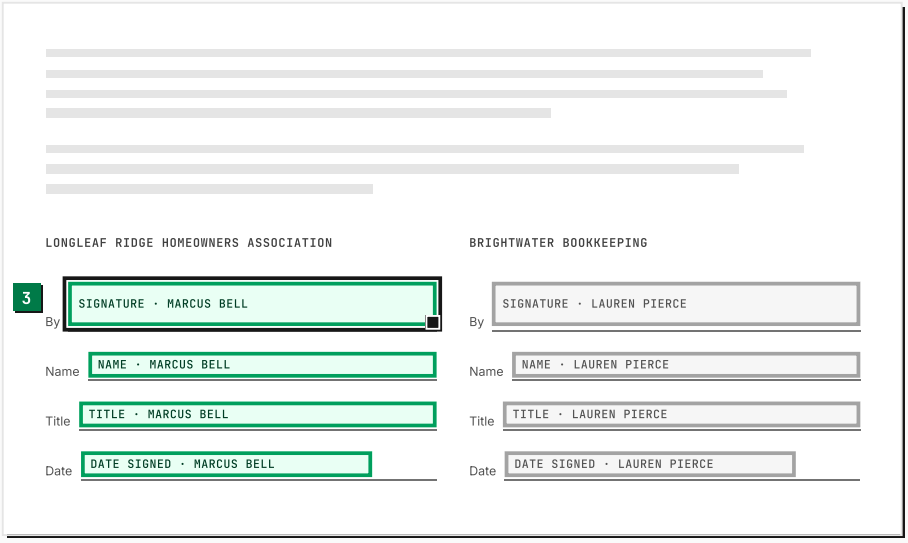
For a document with more than one page, **Initials on every page** adds an initials box for the signer you are placing at the foot of every page that does not have one. Place one initials box first, where you want them, and the button becomes **Copy these initials to every page**: it copies that box to the same spot on every page that lacks one.

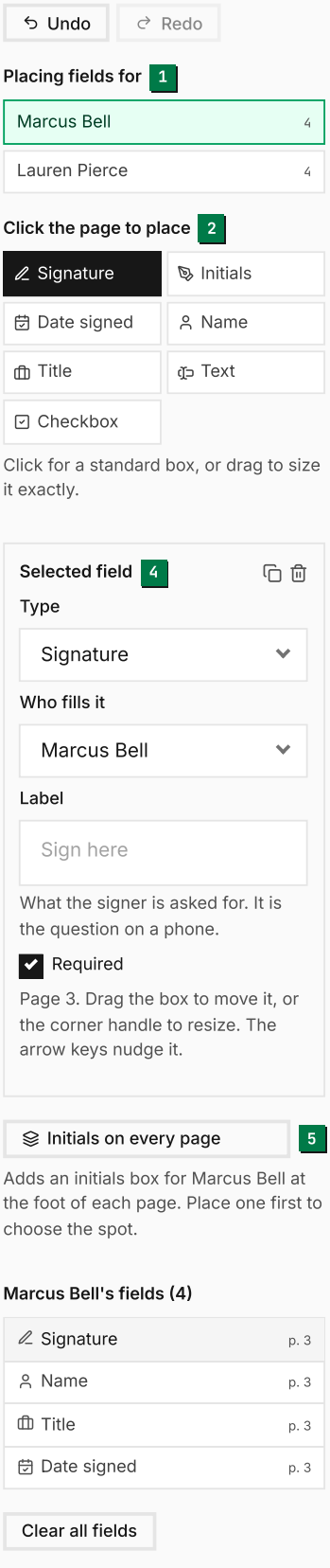
The field list, clearing and undo

The panel lists the selected signer's boxes in page order, for example "Marcus Bell's fields (4)". Click one to jump to it. **Clear all fields** removes every box; the first press changes the button to "Delete all 8 fields?" and the second press does it. **Undo** and **Redo** at the top of the panel step back and forward through your changes.

Keys	What they do
Ctrl+Z (Cmd+Z on a Mac)	Undo
Shift+Ctrl+Z, or Ctrl+Y (Shift+Cmd+Z or Cmd+Y on a Mac)	Redo
Ctrl+D (Cmd+D on a Mac)	Duplicate the selected box
Arrow keys	Nudge the selected box. Hold Shift for a bigger step.
Delete or Backspace	Delete the selected box
Esc	Deselect

The keys do nothing while you are typing in a box such as **Label**, so undo there undoes your typing.





1 Whose boxes you are placing. The count is how many boxes each signer has.

2 The box types. The black one is picked: click the page to place it.

3 The selected box, with its resize handle. Marcus Bell's boxes are green because he is picked; Lauren Pierce's are gray.

4 The Selected field panel for that box.

5 Initials on every page, for a document of more than one page.

FIGURE 18.4 Page 3 of the engagement letter after Add all 8: one signature block for each signer, with Marcus Bell's signature box selected.

Before you send

The card under the pages, headed **Before you send**, holds three settings. None of them is part of what is signed, so you can change them freely until you send.

Due date (optional)	The last day to sign. The help line says what it does, for example "The link stops working after October 16, 2026." With no due date it reads "No deadline. Each link works for 90 days." You cannot pick a day that has already passed. Press **Clear** to remove the date.
Message to the signers (optional)	A note "Shown in their email and at the top of the signing page", introduced there as a note from your workspace. Up to 2,000 characters.
Remind them automatically	On unless you turn it off. The line under it reads "Reminded automatically every 3 days until they sign, at most 3 times. Each reminder carries a fresh link." Turned off, it reads "Nobody is chased unless you press Remind on the document page."

> HOW REMINDERS WORK
>
> A reminder goes to a signer who has an email address, whose turn it is, and who has not signed or declined. The 3 days count from their invitation or their last reminder. Each reminder, automatic or one you send with **Remind**, carries a fresh link, and the link in the earlier email stops working; the reminder says so. Automatic reminders stop once a signer has had 3 reminders in all, counting the ones you sent yourself. They also stop at the due date and as soon as anyone declines.

What stops a send

The **Send for signature** button stays gray while anything is wrong, and a list above it says what, each line with a warning sign.

Message	What to do
Nothing has been placed on the document yet. Add at least a signature box.	Place at least one box.
Marcus Bell has nothing to fill in. Give them a field or remove them.	Place a box for that person, or remove their row.
Lauren Pierce has fields but nowhere to sign.	Add a Signature or Initials box for that person.
One signer has no name. Everyone signing has to be named.	Type a name in every row.

Message	What to do
"lauren.pierce@example" does not look like an email address (Lauren Pierce). Clear it to hand them their link another way.	Correct the address, or clear it and hand the link over yourself.
Due date: That day has already ended. Pick a later day, or clear it.	Pick a later day, or press **Clear**.
"Renew for 2028" and "Do not renew" are the two halves of one question, so they have to agree on whether it must be answered.	Make both boxes of a yes and no pair required, or neither.

Save the layout for next time

Press **Save this layout for next time**, type a **Layout name** and press **Save**. The page answers "Saved as a layout." A layout keeps a copy of the file, the boxes and the signer slots, so next year's version of the same agreement starts from the upload page with one press of **Use**.

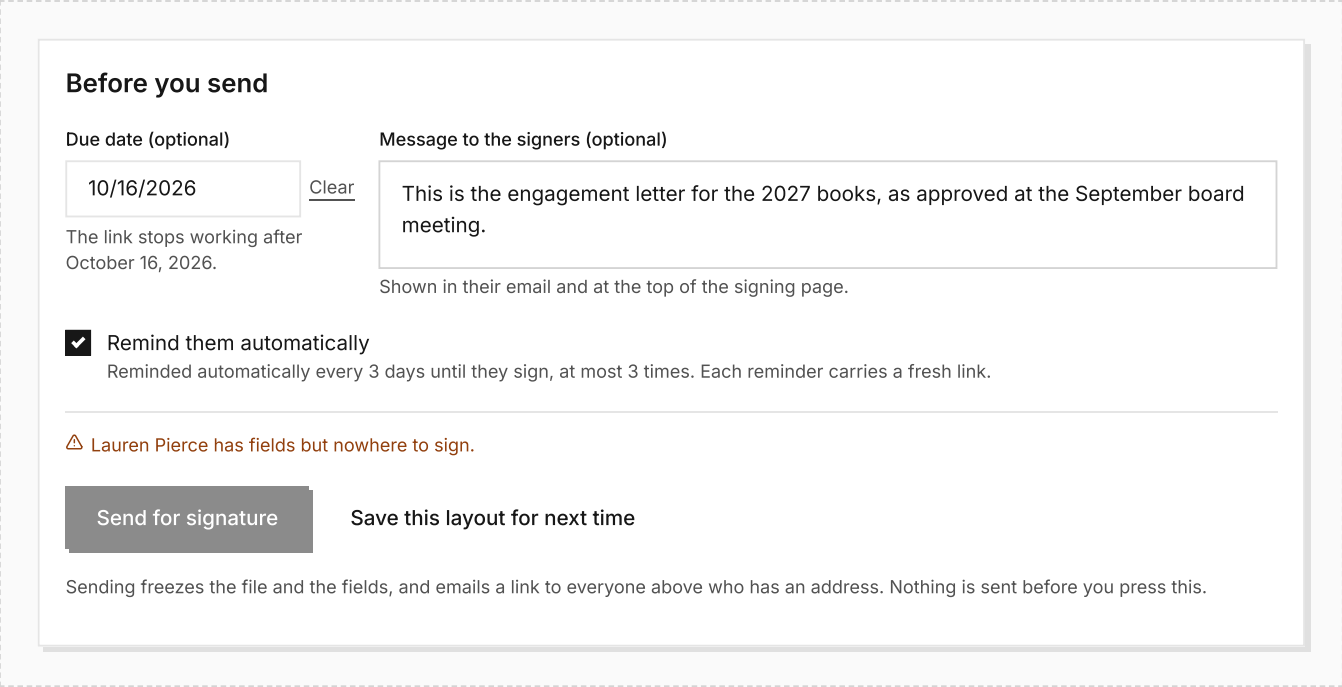


FIGURE 18.5 The send options, with one problem listed. Send for signature stays gray until the list is empty.

Send it, and the one-time links

Press **Send for signature**. The page saves everything on screen first, then sends. Sending freezes the file and the boxes: to change them afterwards you withdraw the document and send a new one. Each signer with an email address is sent an invitation. With signing in order, only the first signer is.

The page then shows **Sent.** and how many emails were queued. Below it, a card headed **These links exist only on this screen** lists each signer with their six-digit code (for example "Code 472 913"), their email address or "no email address", "waiting their turn" when signing in order, a **Copy link** button and the full link.

> **COPY WHAT YOU NEED NOW**
>
> vote.direct keeps only a fingerprint of each link, so no page can show these links again. Copy the link for anyone without an email address before you leave this screen. If a link is lost later, make a new one from the document page (see Track a document).

If you are one of the signers yourself, a green panel says so. When it is already your turn it offers **Sign it now**, which opens your signing page in a new tab. Press **Track this document** to open the tracking page, or **Open the PDF** to see the original file.

With signing in order, a link you copy now for a later signer who has an email address is replaced when their turn comes, by the link in their turn email.

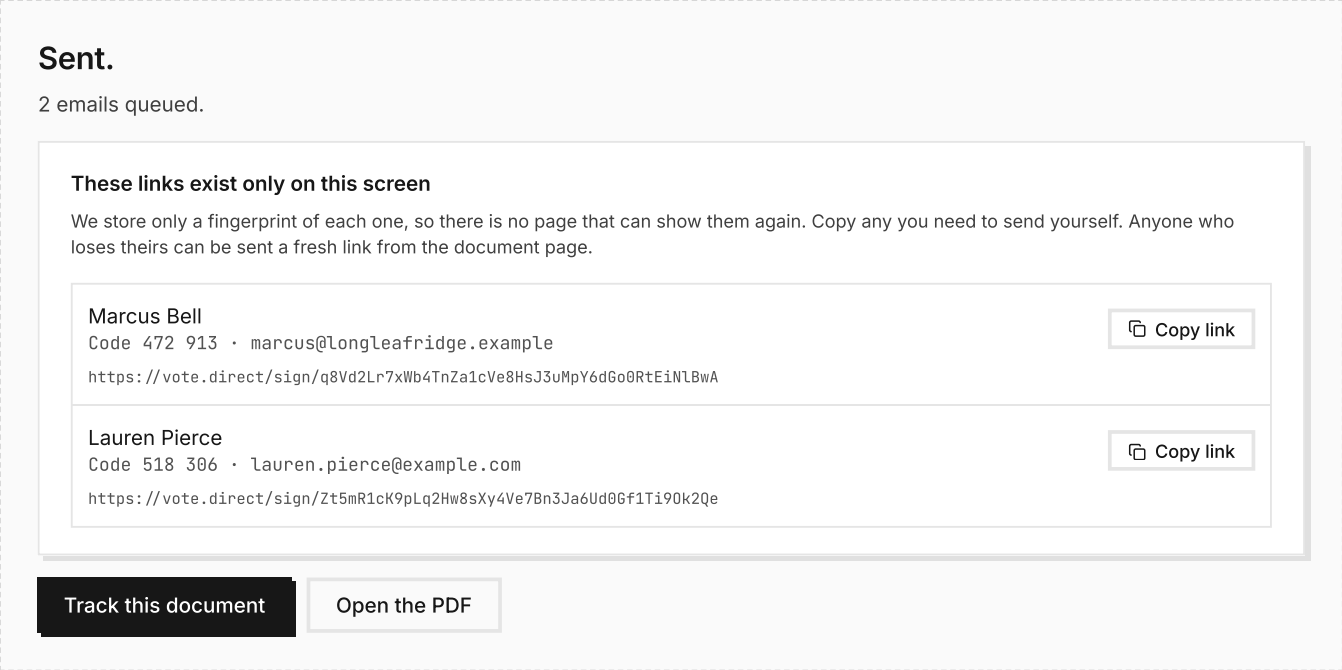


FIGURE 18.6 The screen after sending. It is the only place each signer's link is ever shown.

Track a document

Open a document from the list to see where it stands. While a document is out for signature, its page reads itself again every 30 seconds whenever you have it on screen, so you can watch a signature come in.

Where it stands

The panel at the top says where the document is in one sentence, with a short bar for each signer (green signed, red declined, gray still to sign) and the one button that fits.

Headline	The button
"Waiting for Lauren Pierce" (with more than three people: "Waiting for 4 people")	**Remind Lauren**, or **Remind everyone waiting**. When nobody waiting has an email address, a note says to make a new link from their row.

Headline	The button
"Signed by everyone on October 8, 2026"	**Download the signed PDF**. If the signed copy was not produced, **Produce the signed PDF**.
"Declined by Lauren Pierce", with the reason they gave	**Withdraw it**
"Withdrawn October 9, 2026"	None
"Draft, not sent"	**Pick up where you left off**

While a document is waiting, the sentence under the headline adds how many have signed, whether the person it waits on has opened it, when anything last happened and the due date.

Details

The next card shows the due date ("Due October 16, 2026. The links stop working after that day."), the reminder setting and **Your note to them**. On a document that is out, the reminder line has a button: **Stop automatic reminders**, or **Turn on automatic reminders**. You can change this after sending, for example when a signer asks you to stop emailing them.

Signers

Each signer's row shows their name and title, their email address (or "No email address. Hand them a link yourself."), and one line about where they are:

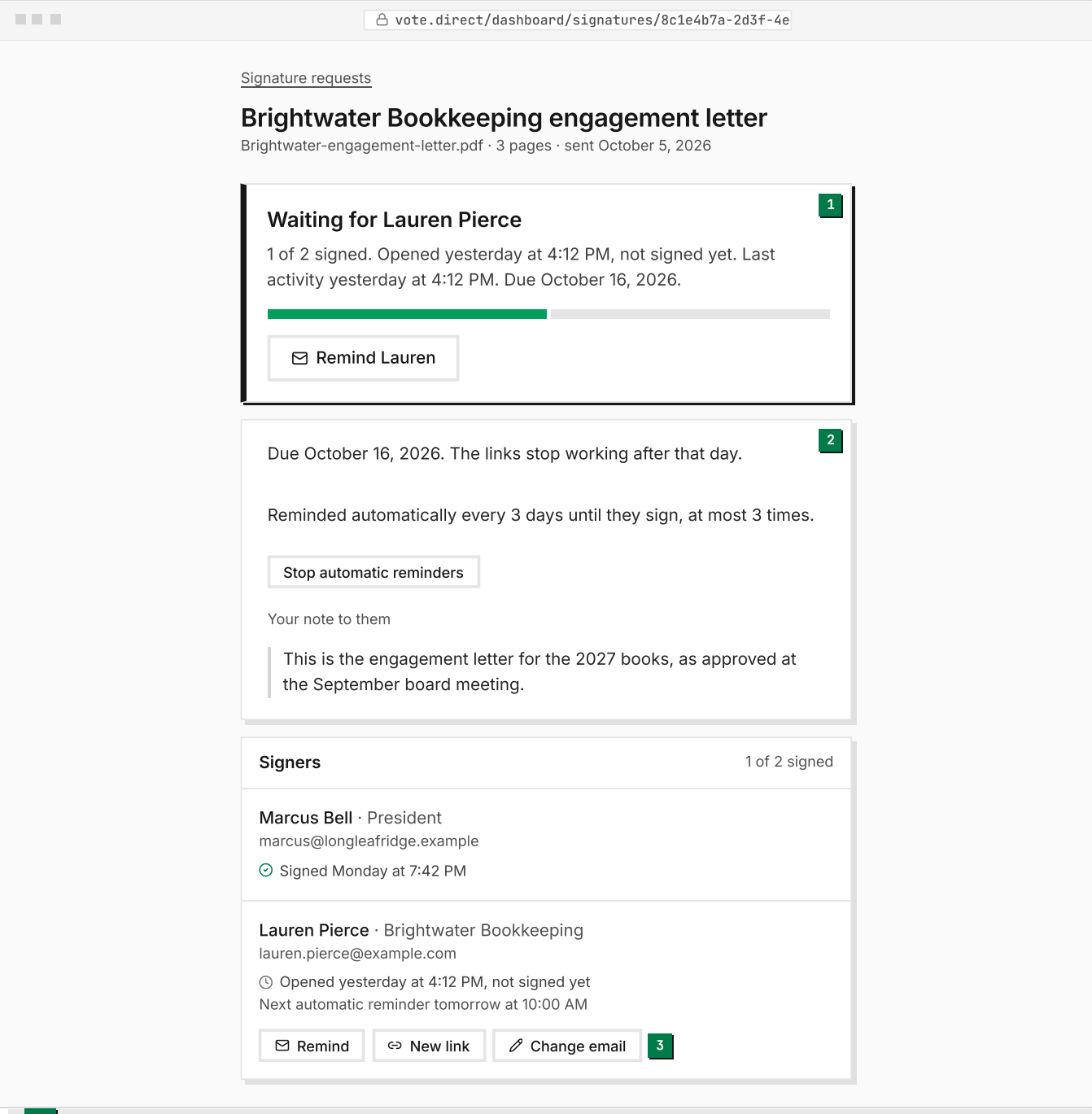
Line	Meaning
"Signed Monday at 7:42 PM"	Done.
"Opened yesterday at 4:12 PM, not signed yet"	They looked and did not finish.
"Emailed Monday at 10:00 AM, not opened yet"	The invitation or last reminder was sent and the link has not been opened.
"New link made 2 hours ago, not opened yet. The emailed link no longer works"	You made a new link, and they have not opened it.
"Waiting for Marcus Bell to sign first"	Signing in order, and it is not their turn.
"Declined yesterday at 3:05 PM"	They will not sign. Their reason, if they gave one, is shown in quotation marks.
"Not opened yet"	Nothing has happened yet.

Under that, a row can add "Reminded once, last yesterday at 10:00 AM" and "Next automatic reminder tomorrow at 10:00 AM". Times read the way you would say them; hold the pointer over one for the exact date and time.

Help a stuck signer

While a document is out and nobody has declined, each signer who still has to sign has up to three buttons on their row.

Remind	For a signer with an email address whose turn it is. Sends a reminder with a fresh link. Their earlier link stops working.
New link	The page asks "Make a new signing link for Lauren?" and warns that the link they already have stops working the moment you make it. Press **Make a new link**. The new link is shown once, with **Copy link** and their six-digit code, for you to pass on by text or in person. This is how you reach someone with no email address after the Sent screen has closed.
Change email	Shown as **Add email** when there is none. Type the address and press **Save**. The link sent to the old address stops working. A fresh invitation goes to the new address straight away, or when it is their turn. Saving an empty box removes the address; make a new link to hand over yourself.



1. Where the document stands, with one bar per signer and the button that fits.
2. The due date, the reminder setting you can still stop, and your note.
3. The three ways to help a signer who has not signed.

FIGURE 18.7 The engagement letter two days after sending: Marcus Bell has signed, and Lauren Pierce has opened it but not signed.

Activity

The **Activity** card tells the document's story in sentences, newest first: when it was sent, each invitation and reminder, each time someone opened it, each signature and decline, new links you made and addresses you changed. Several openings by the same person close together are shown as one line, such as "Lauren Pierce

opened it twice". Openings and signatures carry a quieter second line with the kind of device and the network address, for example "Chrome on a Windows computer · 203.0.113.24". The card shows the latest six entries; a button such as **Show all 9** shows the rest.

Files

The **Files** card has three downloads:

- **The original**: the file you uploaded.
- **The signed PDF**: once everybody has signed. Until then the card reads "The signed PDF appears here once everybody has signed."
- **Certificate of completion**: the record on its own, at any time. Before the document is complete it shows who has signed so far and who has not.

Under the buttons, **Verification details** opens the fingerprint of the file that was signed and, once it exists, the fingerprint of the signed copy (see The completion record).

Withdraw or discard

The last card takes a document back. For a document that is out it reads **Withdraw this document** and says how many links are live. For a draft it reads **Discard this draft**.

1. Press **Withdraw** (or **Discard**). The card changes to say what it costs, for example "Withdrawing kills 1 live link". Anyone part way through signing loses what they were doing, and the signatures already given stay on the record and still print on the certificate.
2. Type a reason under **Why (this goes on the certificate)**. For a draft the label is **Why (kept on the record)**. A reason is required.
3. Press **Withdraw it** (or **Discard it**), or **Keep it open** (or **Keep the draft**) to change your mind.

> CANNOT BE UNDONE
>
> Every outstanding link stops working at once. A document everybody has signed cannot be withdrawn: the page answers "Everybody has signed this, so it cannot be withdrawn. A signed agreement is undone by agreement between the parties, not here."

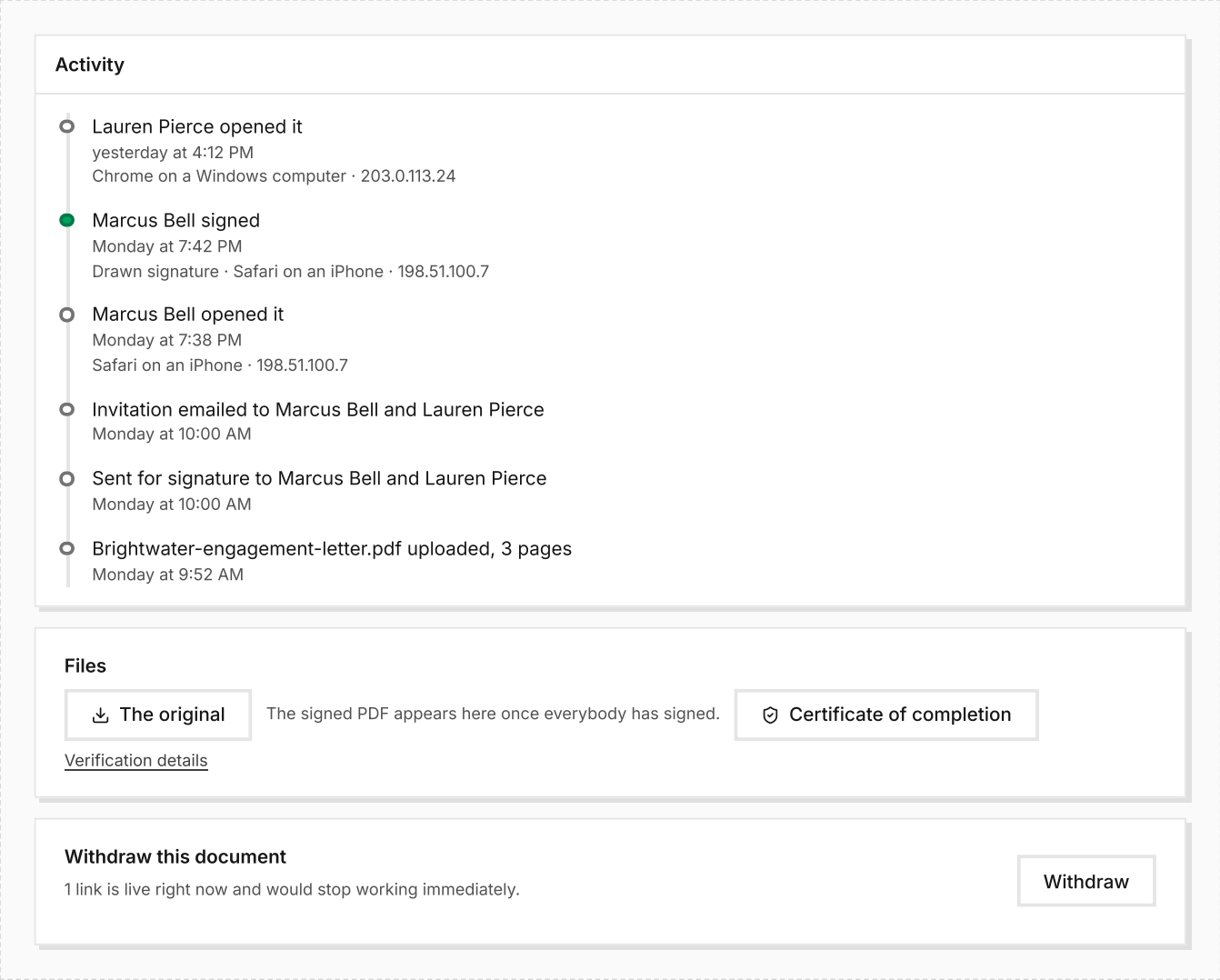


FIGURE 18.8 Lower on the same page: the activity, newest first, the files, and the card that withdraws the document.

The emails

Signers receive up to four kinds of email. They come from your workspace's name followed by "via Vote.Direct", for example "Longleaf Ridge Homeowners Association via Vote.Direct". Each email that asks for a signature shows the document's name and page count, the due date and your note when you set them, a **Review and sign** button, the signer's six-digit code and the line "This link is yours alone. Please do not forward this email."

Email	When it is sent	Subject
Invitation	When you send. With signing in order, to the first signer only.	Longleaf Ridge Homeowners Association sent you "Brightwater Bookkeeping engagement letter" to sign
Your turn	Signing in order, when everyone above them has signed. It lists who has already signed.	Your turn to sign "Brightwater Bookkeeping engagement letter"

Email	When it is sent	Subject
Reminder	Automatically, or when you press a Remind button. It says when the document was first sent and that this link replaces the earlier one.	Reminder: please sign "Brightwater Bookkeeping engagement letter" by October 16, 2026 (with no due date: Reminder: "Brightwater Bookkeeping engagement letter" is waiting for your signature)
Signed copy	When everyone has signed, to each signer with an email address. Its button is **Download your signed copy**, and the link keeps working.	Your signed copy of "Brightwater Bookkeeping engagement letter"

From Longleaf Ridge Homeowners Association via Vote.Direct
To lauren.pierce@example.com
Subject **Longleaf Ridge Homeowners Association sent you "Brightwater Bookkeeping engagement letter" to sign**

SIGNATURE REQUESTED

Brightwater Bookkeeping engagement letter

From Longleaf Ridge Homeowners Association

Hello Lauren Pierce (Brightwater Bookkeeping),

Longleaf Ridge Homeowners Association has asked you to sign "Brightwater Bookkeeping engagement letter". It opens on a phone or a computer, and you sign by drawing your signature or typing your name.

> **A note from Longleaf Ridge Homeowners Association**
> This is the engagement letter for the 2027 books, as approved at the September board meeting.

Document	Brightwater Bookkeeping engagement letter (3 pages)
Please sign by	October 16, 2026

Review and sign

The link stops working after October 16, 2026.

Button not working? Copy this link into your browser:
https://vote.direct/sign/Zt5mR1cK9pLq2Hw8sXy4Ve7Bn3Ja6Ud0Gf1Ti9Ok2Qe
Your code, if you are asked for one: **518 306**
This link is yours alone. Please do not forward this email.

Sent through Vote.Direct on behalf of Longleaf Ridge Homeowners Association. Before you sign, you are shown what signing electronically means and what you keep the right to do.

FIGURE 18.9 The invitation Lauren Pierce receives, with the note from the sender quoted above the details.

Emails to you

vote.direct also sends a short notice each time someone signs (Marcus Bell signed "Brightwater Bookkeeping engagement letter"), when someone declines (Lauren Pierce declined to sign "...", with the reason they gave), and when everyone has signed. Each notice has an **Open the document** button that opens the tracking page.

> GOOD TO KNOW
>
> These notices go to the email address of the account that owns the workspace. If an admin sends the document, the owner receives the notices, not the admin.

What your signers see

A signer needs no account and no password. They open the link from their email, or the one you handed them, on a phone or a computer. They see only their own boxes; other signers' boxes are not drawn at all.

Who is asking

The top of the page names the sender: your workspace's logo if it has one (see Governance Center), otherwise its initials, and "Longleaf Ridge Homeowners Association sent you a document to sign". Below that come the title, "For Lauren Pierce, Brightwater Bookkeeping", the page count, "Please sign by October 16, 2026", and your note, introduced as "A note from Longleaf Ridge Homeowners Association". At the foot of the page: "Sent securely with Vote.Direct." and a line to call or text Vote.Direct for help.

Step 1: agree to sign electronically

The first card is headed **Before you start: agreeing to sign electronically**. It shows the terms in full, in a box that scrolls: that they may have the document on paper instead, that they may withdraw their consent, that the consent covers this document only, that they should keep their contact details current, what they need to read and keep it, and who receives their details. They tick "I have read the above and I agree to sign this document electronically." and press **Start signing**. Until the box is ticked, every box on the document is locked. If they press **Start** first, the card is outlined in green and a line beside its button says "Tick the box above first." The time they ticked the box is kept with their signature. After they start, the card folds down to one line, "You agreed to sign electronically.", with a link to **Read the terms again**.

Step 2: go through the boxes

The document follows, under the heading **The document**, with "Your boxes are outlined. Everything else on the page is there for you to read." A box that must still be filled has a solid black outline, an optional one is dashed, a finished one turns green and one with a problem turns red. Before they agree, every box is dashed and gray. A green flag beside the box they are on says what to do: "Sign here ›", "Initial ›", "Fill in ›" or "Tick ›". Name and Title boxes start filled in, and Date signed boxes fill themselves.

A bar stays at the bottom of the screen. On the left it shows progress ("2 of 3 done") or "Agree to sign electronically to begin". On the right is one button that always knows what is next: **Start**, then **Next**, which moves to the next box that needs them, then **Sign** or **Initial** at a signature or initials box, and **Finish** when everything is filled in. A phone number or email address that does not look right is named in red in the bar ("Check: ...") until it is fixed.

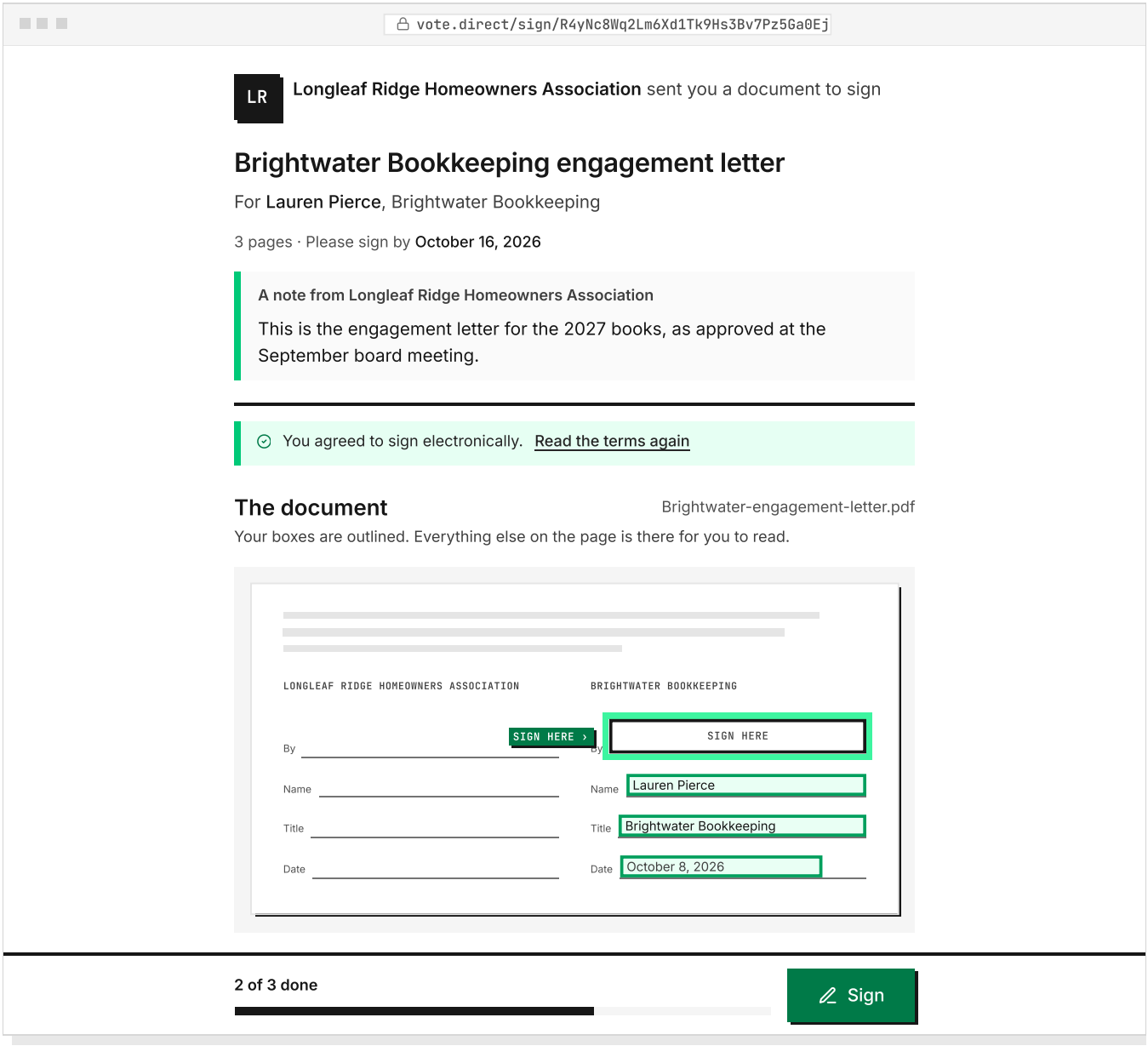


FIGURE 18.10 Lauren Pierce's page on a computer after she agreed. Only her four boxes are drawn: the flag points at the signature box, the button in the bar says Sign, and the Name, Title and date boxes are already green.

On a phone

On a phone the page is drawn at the width of the screen, so tapping a box opens a sheet instead of typing into a sliver. The sheet shows where they are ("2 of 3 done"), the box's label as the question, a full-size box with the right keyboard, and two buttons: **Done** and **Next**. For a yes and no pair the question reads "Choose one".

A phone also gets a link at the top: "On a phone? Fill it in as a simple form instead. Your answers still go onto this document." The form view asks the same boxes as a list of questions under the heading **The form**, with a **Your signature** card underneath and an **Adopt your signature** button. Its own link, **See the form as printed**, goes back to the page view. Both views write the same answers onto the same PDF, and answers stay on the device while the page is open, so switching views does not lose them.

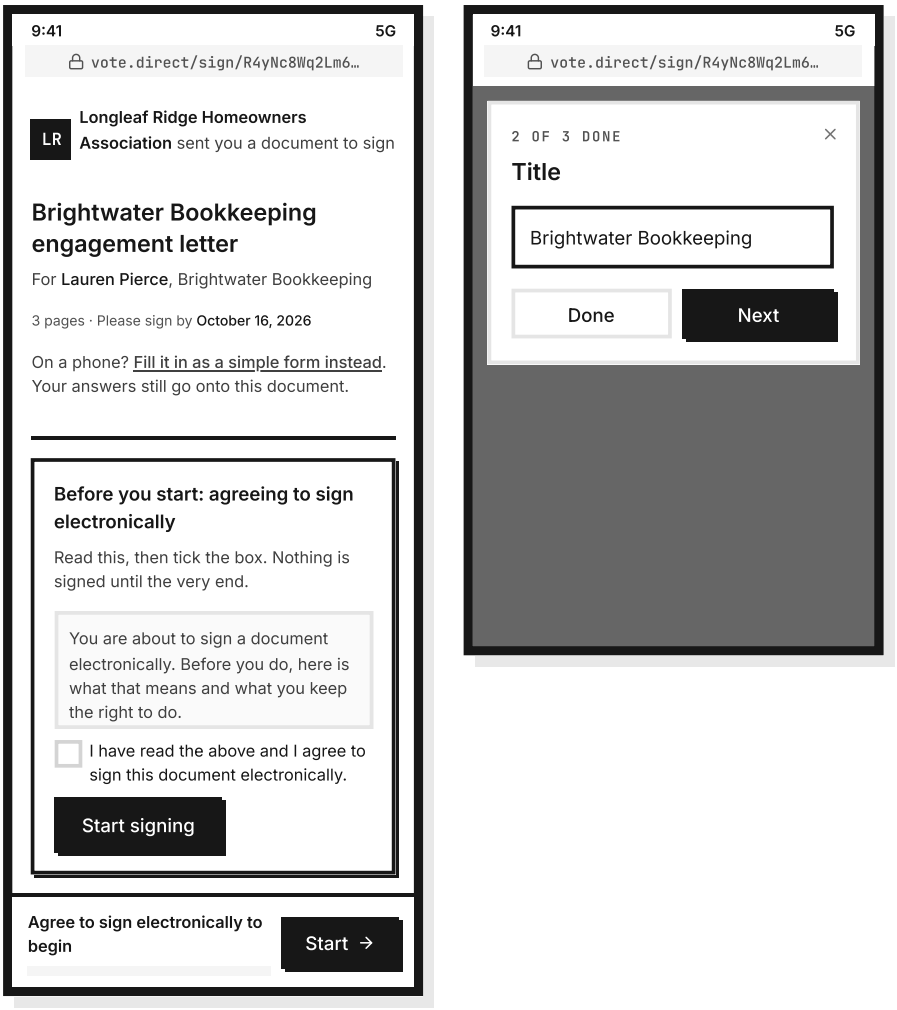


FIGURE 18.11 On a phone: the agreement card comes first, and the bar's Start button points back to it until the box is ticked. Tapping a box later opens a sheet with the question and a full-size answer box.

Step 3: adopt a signature

At the first signature or initials box, the signer presses **Sign** (or taps the box) and the **Adopt your signature** dialog opens. On a phone it fills the screen.

1. They check **Your full legal name**. It starts with the name you typed for them, and it is the name the record keeps.
2. They choose how to sign. **Choose a style** shows their name in three handwriting styles, **Classic**, **Handwritten** and **Formal**, with Classic picked to start with. **Draw it** gives them a box to sign in with a finger or the mouse, and a **Clear** button.
3. They press **Adopt and sign**. The dialog says "Nothing is sent yet. You can change it until you finish."

The one signature fills every signature box that is theirs, and their initials fill every initials box. With a style, the initials are made from their legal name and shown as "Your initials: LP". With a drawing, they draw their initials in a second box. The style they chose is the one printed on the signed PDF and the certificate.

Step 4: finish

When everything is filled in, the bar's button reads **Finish**. It opens **Ready to sign**: "Read this, then sign. This is the step that signs the document." Above the button is the exact sentence the record keeps with their signature:

"By signing below I am signing "Brightwater Bookkeeping engagement letter" electronically. I intend this to be my signature, and I agree it has the same effect as signing on paper."

Below it they see "Signing as Lauren Pierce" with their signature, a **Change my signature** link, and the button **Sign and submit**. If the document or the terms changed while their page was open, they are told to reload and read it again before signing.

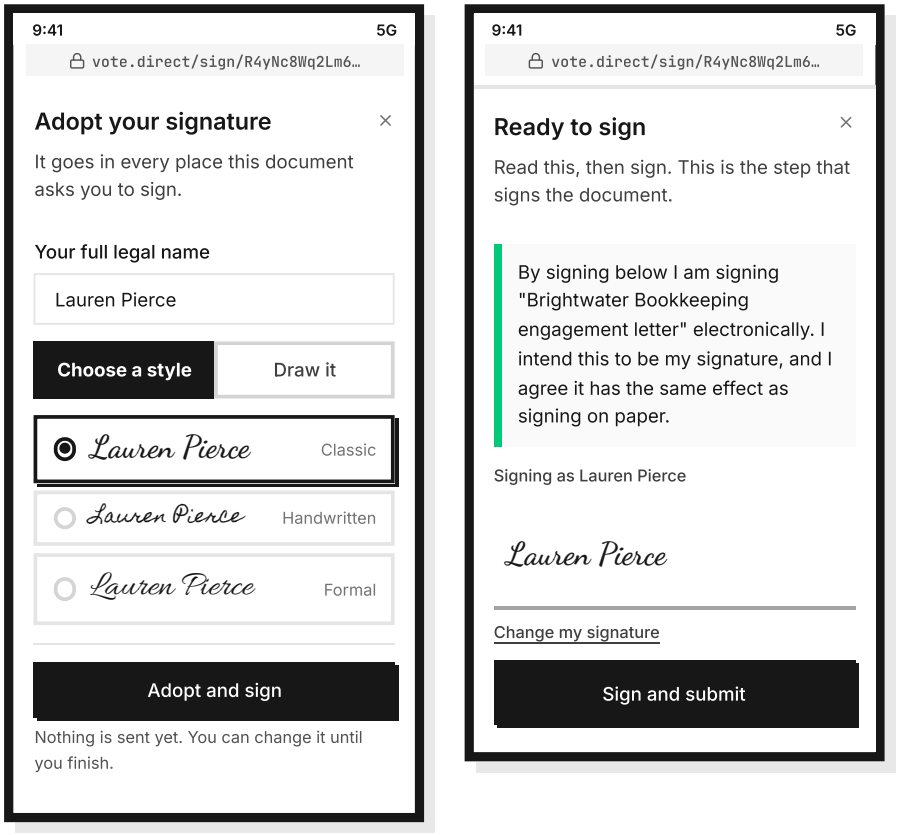


FIGURE 18.12 Adopting a signature in the Classic style, and the last step, which shows the exact sentence the record keeps above the button that signs.

Done

After signing, the page reads "Signed. Thank you." with the date and time the signature was recorded. If theirs was the last signature, a card headed **Everyone has signed** offers **Download your signed copy** and says a copy is also being sent by email. A signer with no email address is told to download it now; the link they opened shows it again later. If others still have to sign, a note headed **What happens next** says you can see that they signed and that a copy will be emailed once everybody has signed.

Saying no

At the foot of the page is a quiet link: "Not going to sign it? **Tell the sender you are not signing**". It opens a panel, "You are about to decline to sign", with an optional box for a reason (up to 500 characters) and the buttons **Confirm: I am not signing** and **Keep it open**. Once confirmed, the page reads "Recorded. You have not signed." The owner of the workspace is emailed, and the list and tracking page show the decline with its reason. The signer cannot undo a decline from their page.

Other messages a signer can see

What the page says	When
This document is waiting for Marcus Bell to sign first.	Signing in order, before their turn. They can read the document; there is nothing to sign yet.
You have already signed this	They open their link again after signing. Once everyone has signed it offers **Download your copy**.
Signed by everyone	The document is complete. It offers **Download your copy**, with the certificate at the back.
This link is not active	The link was replaced by a newer one (a reminder, a new link or a changed address), or it was copied only in part.
This link has expired	The link is past its lifetime. Send a reminder or make a new link for them.
This document was withdrawn	You withdrew it. Your reason is shown.
This document has closed	It is past its due date and no longer accepting signatures.
You told us you are not signing this	They declined earlier.

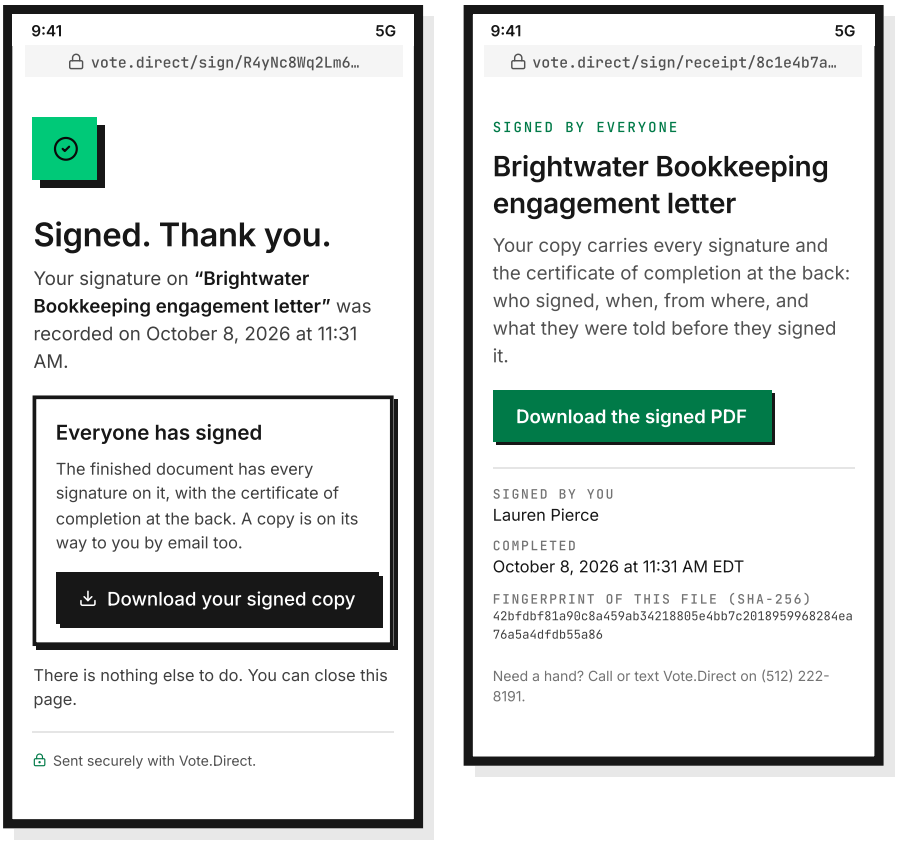


FIGURE 18.13 The last signer's screen, and the page their signed-copy email opens. That link keeps working after the document closes.

The completion record

When the last person signs, vote.direct closes the document, produces the signed PDF, sends each signer with an email address a copy, and sends the workspace owner a notice. If producing the signed PDF fails, the tracking page offers **Produce the signed PDF** to try again.

The signed PDF

The signed PDF is your original file with each mark drawn where its box was: typed signatures in the style the signer chose, drawn signatures as drawn, initials, the date each person signed (written out, in their own time zone), every typed answer and every tick. A fillable form's own fields are flattened into the page, so nobody can edit them afterwards. The file you uploaded is kept separately and unchanged. The certificate of completion is added at the back.

The certificate of completion

The certificate is the record of how the document was signed. It contains:

- The title, your workspace's name, the document's reference number, the file name and page count.
- Two fingerprints: one of the file that was signed, and one of the record, which covers the title, the file and the boxes.
- When it was created, sent for signature and completed, in UTC, and "Signed by 2 of 2." (with "in order" when signing was in order).

- For each signer: their signature as adopted, their name and title, when they signed, how ("drawn by hand", or "typed" with the style), when they agreed to sign electronically and which version of the terms, the network address they signed from, the address they were invited at, every answer they gave, and the exact sentence they signed under.
- A check of the text each signer saw against the document: "Text signed: matches this document". If the record had changed after someone signed, the certificate says so in capital letters beside that signature.
- The full terms each signer accepted before signing, and the sentence they ticked.
- Tables of anyone who declined (with when and the reason given) and anyone who has not signed yet.
- If you withdrew the document, a WITHDRAWN line with the date and your reason. Signatures collected before that still print.

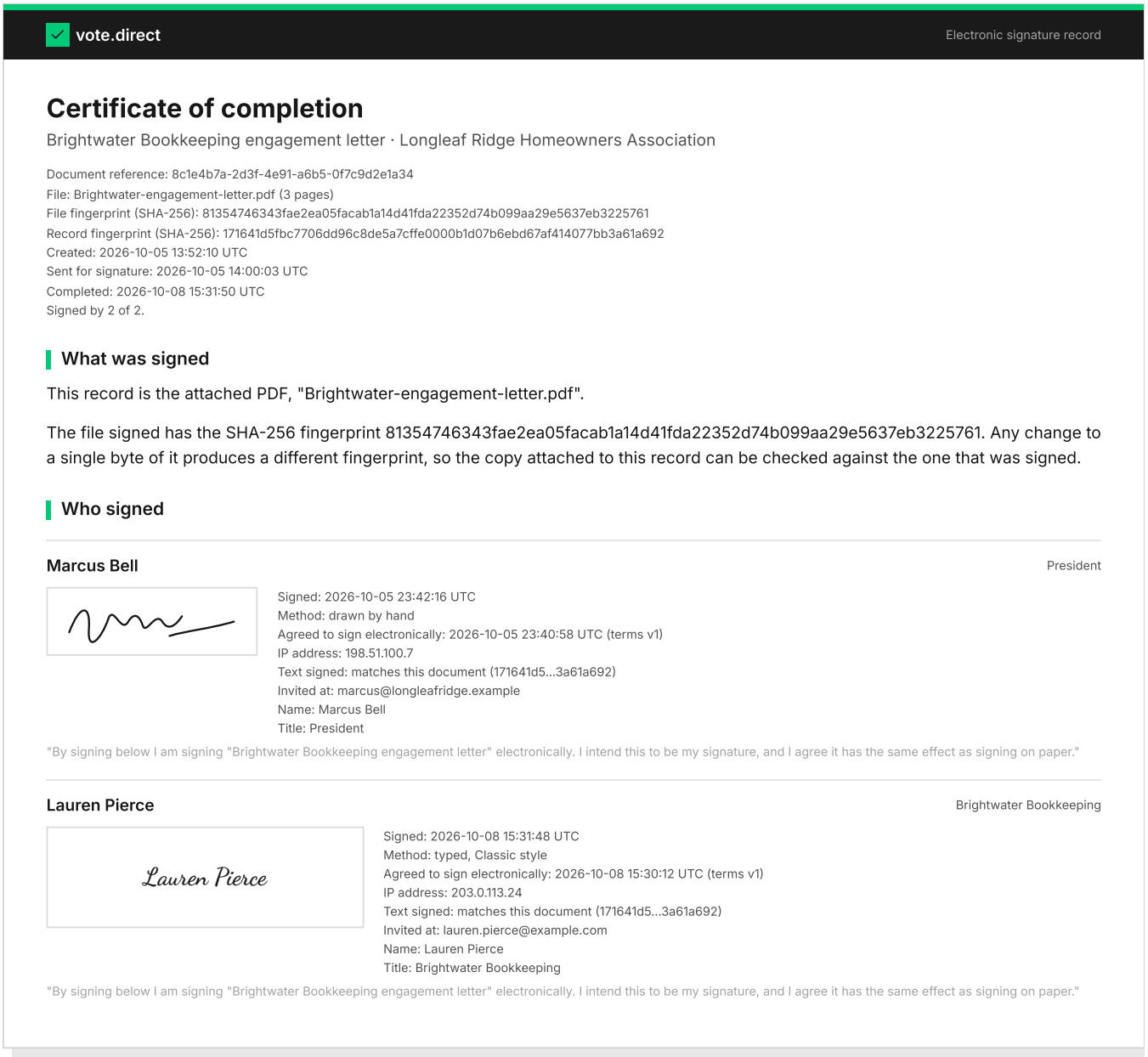


FIGURE 18.14 The top of the certificate at the back of the signed engagement letter. The full terms both signers accepted come after the signer blocks.

Fingerprints

A fingerprint (shown as SHA-256) is a long code worked out from every byte of a file. The same file always gives the same fingerprint, and the page explains that "A change to a single byte gives a different fingerprint." To check a copy someone sends you, compare its fingerprint with the one on the tracking page under **Verification details**, on the certificate, or on the signer's copy page.

The signer's copy and the six-digit code

The signed-copy email opens a page that reads "Signed by everyone", with **Download the signed PDF**, the name they signed as, when the document was completed (in their own time zone), and the fingerprint of the file. The link carries the signer's six-digit code, the same code shown on your Sent screen and in their emails, so it keeps working after the document has closed. A link copied without its code opens "This link is not complete". A signer who has lost it can open their signing link again and use **Download your copy**.

Limits at a glance

What	Limit
File	One PDF per document, up to 25 MB and 200 pages
Uploads	Up to 20 an hour
Signers	Up to 12 per document, each with their own boxes
Signer name	Up to 80 characters
Box label and typed answers	Up to 300 characters
Message to the signers	Up to 2,000 characters
Link lifetime	90 days from when the link is made, and never past the due date. A reminder or a new link makes a fresh link.
Automatic reminders	Every 3 days. They stop once a signer has had 3 reminders in all, counting the ones you sent.
Reason for withdrawing or declining	Up to 500 characters
Changes after sending	Only the automatic reminder setting, signers' email addresses and new links. The file and boxes are frozen.

CHAPTER 19

Governance Center

Governance Center is vote.direct with a Board Office around it: meetings and minutes, records, notices and letters, dues, requests, and a portal for your members. This chapter is an overview for a community that uses it, or is deciding to.

IN THIS CHAPTER

- What Governance Center is
- How you get it
- The Board Office
- The ten rooms
- Presets: your community's words
- Written consents
- Letters and electronic consent
- Members, requests and dues
- Records
- Community board, branding and settings
- The member portal
- When a plan lapses

What Governance Center is

Governance Center is the same product as vote.direct, for a community that wants to run its whole year in one place and not only its elections. It opens at `app.governance.center`, with its own menu called the Board Office. Your workspace, your roster and your elections are the same ones you see on vote.direct.

It adds four modules to what vote.direct already does:

- **Meetings and minutes**: meeting notices, RSVPs, quorum and minutes that file into the record.
- **Documents and resolutions**: bylaws, resolutions, policies and minutes, kept in Records.
- **The member portal**: your members' own page, with their ballots, the board's announcements, meetings and documents, and the requests they send the board.
- **Dues and assessments**: who has paid, each member's own standing, and reminders to whoever has not.

Elections and live meetings work the way the rest of this guide describes. In the Board Office, your elections are listed in Decisions, and live meetings are the **Live meetings** tab of the Meetings room.

How you get it

The modules come with a Governance Center community plan, paid yearly. Plans are sized by the number of members in your community, and each includes every module. The owner of the workspace buys the plan in Governance Center, under **Settings**, **Billing**, where the plans and their prices are shown. vote.direct's plans for elections do not include these modules.

Until a plan is active, each Governance Center page says what it does and offers **See plans** or **See community plans**. You can open every room and read what it is for.

Once the plan is on, vote.direct's own menu also shows **Documents**, **Community**, **Requests** and **Dues**, and **Meetings** opens the full Meetings room instead of only live meetings. Some things exist only in the Board Office at app.governance.center: the room menu and its tabs, Letters, your community's logo and colors, its preset, and the Modules switches.

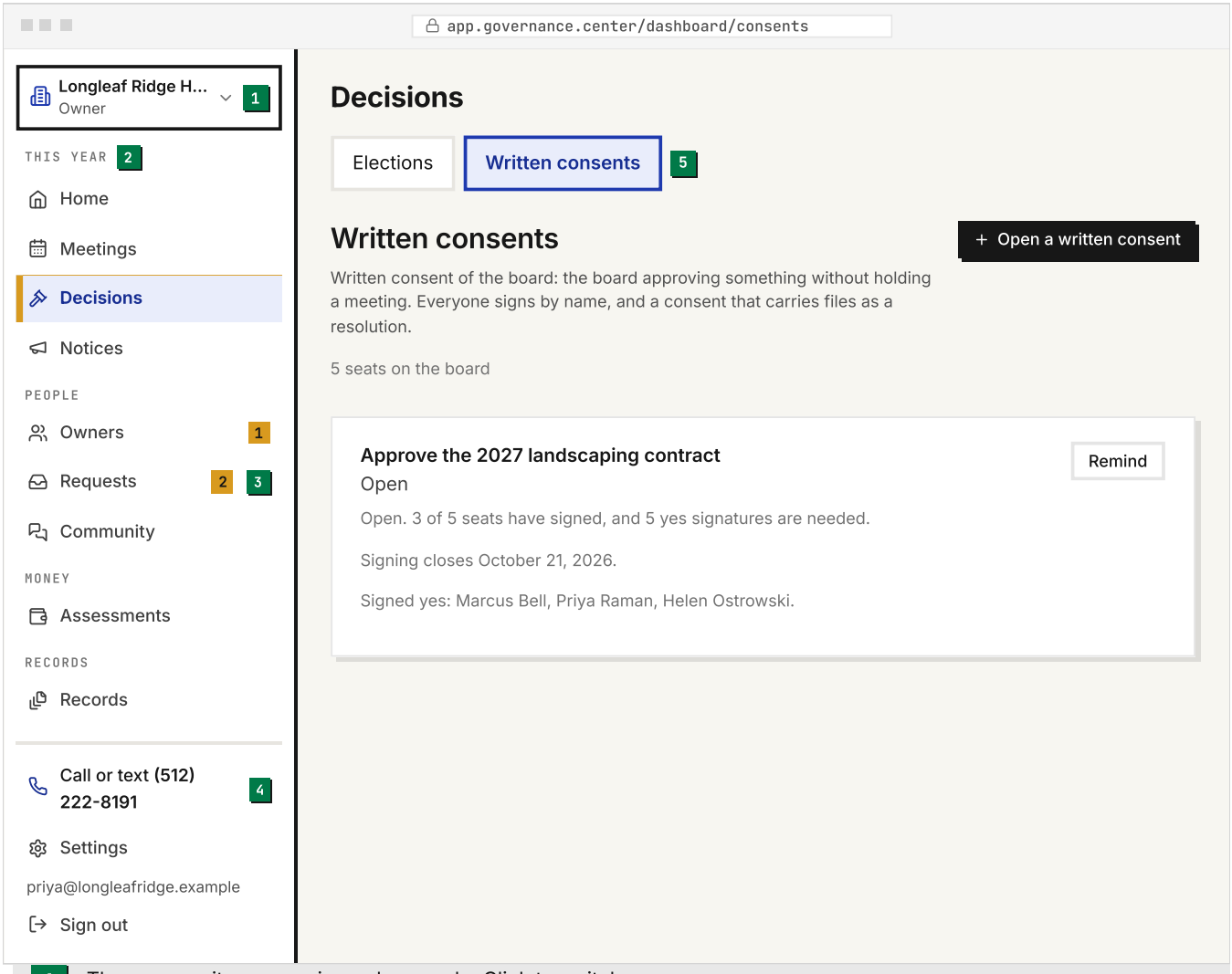
The Board Office

On a computer

A sidebar runs down the left side of every page.

- At the top is your community's name and your role (Owner, Admin, Editor or Viewer), with its logo if it has one. Click it to switch to another community under **Your communities**, or to **Create a community**.
- The rooms follow in four groups: **This year**, **People**, **Money** and **Records**. The room you are in has a gold edge and blue text.
- A gold square with a number means something is waiting: a meeting whose notice deadline is within 14 days and whose notice has not gone out (Meetings), a decision closing within 7 days (Decisions), contact details sent in by members (Owners), open requests (Requests), or overdue payments (Assessments).
- At the bottom: **Call or text (512) 222-8191**, **Settings**, your email address and **Sign out**.

Inside a room, the room's name is the page heading, and a row of tabs under it holds the room's sections. The tab you are on is outlined in blue. Each tab has its own address, so a bookmark opens that tab.



1. The community you are in, and your role. Click to switch.
2. The four groups of rooms. The room you are in has a gold edge.
3. A gold count: two requests are waiting on the board.
4. The support line, always at the foot of the sidebar.
5. The room's tabs. Written consents is the one open.

FIGURE 19.1 The Board Office on a computer for Longleaf Ridge, with the Decisions room open on its Written consents tab.

On a phone

On a phone or a narrow window, a bar at the top holds the community's name (tap it to switch) and the support number. A bar along the bottom holds four rooms, **Home**, **Meetings**, **Owners** (or **Members**) and **Records**, and **More**. More opens a sheet with every other room, Settings, the support number and Sign out. A number on More counts what is waiting inside it, so nothing hides behind the sheet.

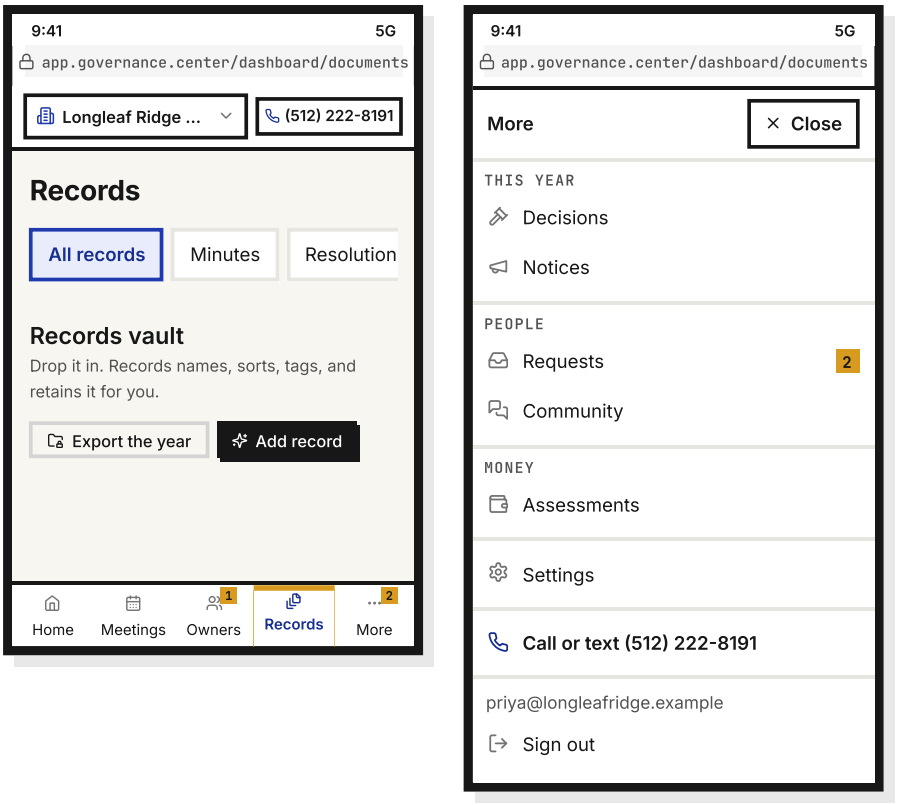


FIGURE 19.2 The Board Office on a phone: the Records room with the bottom bar, and the More sheet holding the other rooms. The 2 on More is the two requests waiting inside it.

> HELP
>
> The support line is (512) 222-8191, call or text. It is in the sidebar, the phone's top bar, the More sheet and the header of the member portal. See Getting help.

The ten rooms

The table lists each room as an HOA sees it, with its tabs and what it is for.

Room	Tabs	What it is for
Home	None	What needs the board today.
Meetings	Calendar and minutes; Live meetings	Agendas, notices, minutes and live votes.
Decisions	Elections; Written consents	Elections and written consents.
Notices	Announcements; Letters; Electronic consent	What you sent, and to whom.
Owners	Roster; Changes from owners; Board and officers; Portal access; Fields	Your roster of owners, and who sits on the board.
Requests	From owners; Realtors and title companies	What owners, realtors and title companies asked the board.

Room	Tabs	What it is for
Assessments	None	Assessments, reminders and who has paid.
Records	All records; Minutes; Resolutions; Bylaws and policies; Templates; State rules; Forms returned; Signature requests	Documents, resolutions and minutes, kept.
Community	None	The noticeboard your owners post on.
Settings	Profile; Security; Workspace; Decisions; Team; Notifications; Sending domain; Billing	Workspace, team, sending and billing.

Settings sits at the foot of the sidebar rather than in a group. Only the owner sees **Billing**, and **Team** is for the owner and admins. Requests and Community can be turned off on their own pages. A room that is off leaves the menu but keeps its page, and the **Modules** card in **Settings**, **Workspace** is the way back to it. The money room has no switch: it shows from the start for an HOA, condo or club, and for a nonprofit or congregation once its first dues are created.

Home

Home opens with **New notice** and **Schedule meeting**. **Needs you** says what is waiting, in sentences such as "2 requests are waiting on the board.", each linking to its room. Below come four counts, the checklist **Set up your digital city hall** until its four steps are done, the next meeting and recent activity.

Meetings and minutes

The Meetings room has two tabs. **Calendar and minutes** holds "Agendas, notices, RSVPs, quorum, motions, and approved minutes." Press **Schedule meeting** to add one. **Live meetings** is the voting floor, where members vote on motions from their phones (see Live meetings). The floor needs no plan and an editor can run it, so the tab is there even when the calendar is locked; the locked calendar offers **Run a live meeting** as well. On vote.direct, where the room has no tabs, the same **Run a live meeting** button sits beside **Schedule meeting**. Each meeting can print its notice, its agenda and a sign-in sheet, its minutes once they leave draft, and blank proxy forms if your community takes proxies.

Minutes move through four states. In **Draft**, the recorder writes them (empty minutes start from the agenda) and presses **Save draft** or **Submit for review**. In **In review**, an owner or admin presses **Approve minutes** or **Request changes**. **Approved** minutes can be reopened or sent on with **Publish to records**. **Published** minutes are filed as a permanent record your members can see, and the published version is locked.

Presets: your community's words

Each community has a preset that sets the words the Board Office uses. You pick it in **Settings**, **Workspace**.

Preset	People are	Money is	Governing body	Units
HOA or homeowners association	Owners	Assessments	Board	Lots
Condominium association	Owners	Assessments	Board	Units

Preset	People are	Money is	Governing body	Units
Nonprofit board	Members	Dues	Board	None
Club or lodge	Members	Dues	Board	None
Congregation	Members	Dues	Council	None

The words follow everywhere: the room names (**Owners** or **Members**, **Assessments** or **Dues**), tabs such as **Board and officers** (**Council and officers** for a congregation), the member portal (**My assessments** or **My dues**, **Your board** or **Your council**) and letters (Lot for an HOA, Unit for a condo).

A new community also starts with the modules that suit its kind: an HOA or condo with requests on and the community board off, a club or congregation with the community board on and requests off, and a nonprofit board with both off. That happens once, when the community is created. Changing the preset later changes the words and never turns requests or the community board on or off.

Written consents

A written consent is the board approving something without holding a meeting. It is in **Decisions**, **Written consents**. A consent works like a small election sent only to your seated board: one yes or no question, "Approve the resolution below", with your resolution under it. Answers are recorded with each director's name, because a consent is signed, and a director cannot change an answer once given.

Before you start

A consent goes to the seats recorded in **Board and officers** (in the Owners room). With no seats recorded, the page says "Add your board first" and links there. The links go by email: a seat holder with no email address on the roster is not sent one, and the message after sending names them.

Open a written consent

1. Press **Open a written consent**. Type a **Title**, for example "Approve the 2027 landscaping contract".
2. Type the **Resolution**. Its help line reads: "This is the text every seat signs, word for word. It becomes the body of the resolution when the consent carries."
3. Under **How many seats must sign**, choose **Every seat must sign yes** (picked to start with) or **A majority of the seats must sign yes**. Check **Signing closes**, which starts two weeks from today.
4. Press **Send it to the board**. Each seat is sent its own link, and you return to the list.

The threshold counts the whole board, not only the seats that answer. On a five-seat board a majority is three yes signatures, and a unanimous consent needs all five. The number of seats is fixed when the consent opens, so seating a new director later does not change what the consent needs. A consent reads "Did not pass" as soon as it can no longer reach the number, or when it closes short.

A consent is published the way an election is. If publishing is held up, for example by a payment, the message reads "Saved, but not sent yet", says why, and opens the consent's own election page, where you finish.

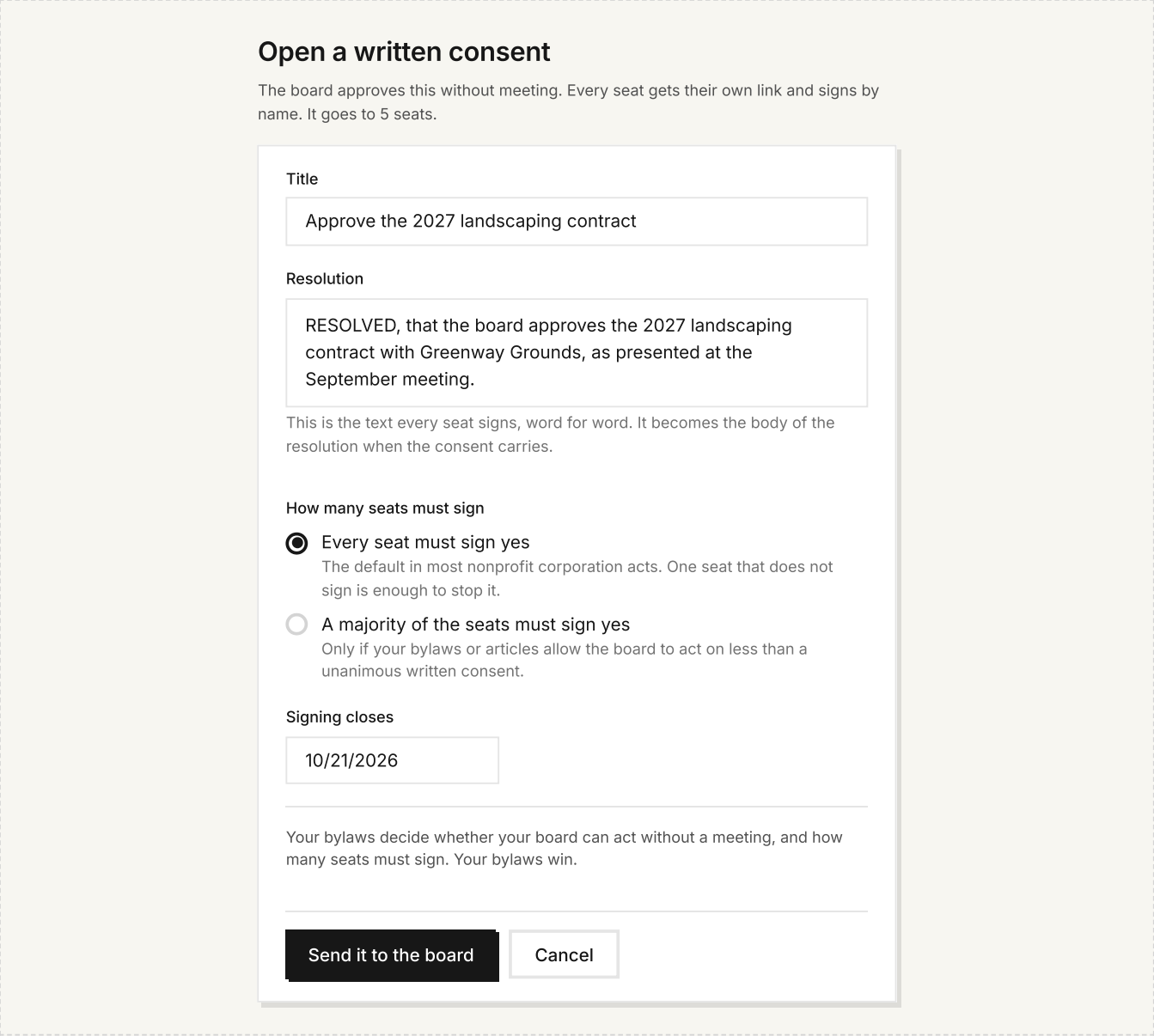


FIGURE 19.3 Opening a written consent for Longleaf Ridge's five seats. North Carolina is not one of the states with a rule shown, so only the bylaws sentence appears.

Your bylaws and state rules

The form always says: "Your bylaws decide whether your board can act without a meeting, and how many seats must sign. Your bylaws win." For a community in one of a few states the product holds a rule for, the form also shows our reading of that state's default rule with its citation, under two lines: "Our reading, to support your review, not legal advice." and "Confirm with your attorney before the board acts."

This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

Following a consent and filing it

Each consent on the list shows its state (**Open**, **Passed** or **Did not pass**), one sentence such as "Open. 3 of 5 seats have signed, and 5 yes signatures are needed.", the closing date and the names of the seats that signed yes. It has one button, named for what is left to do:

- **Remind** on an open consent emails the seats that have not signed.
- **File as resolution** on a consent that passed creates a numbered resolution in Records, for example "Filed as resolution 2026-03", shared with members and kept permanently. It carries the resolution text, the day it was adopted, the count against the whole board and the names of the seats that signed yes.
- **Open the record** once it is filed.
- A consent that did not pass has no button.

Directors also see an open consent in the member portal, on a card labeled "Written consent" with a **Sign** button. After they sign it reads "You signed on" and the date.

Letters and electronic consent

The Notices room has three tabs: **Announcements** (see Announcements), **Letters** and **Electronic consent**.

Letters

A letter is written to one person on your community's letterhead, and the same letter can go to several people at once. You print it for a #10 window envelope, email it, or file a copy in Records. For a message to everyone, use Announcements. Only the owner and admins can write letters.

The page starts with **Your letterhead**: your logo and color (from **Settings**, **Workspace**), your community's name, and a return address of up to four lines. Under **Choose a letter** come the starter letters, each with **Write this letter** and **Edit the wording**, then **Write a new letter from nothing**. A starter you reword and save becomes your version and takes the starter's place in the list; archive your version to bring the starter back.

An HOA's starters are "Friendly reminder about a community rule", "A concern about your property", "Welcome to the community", three architectural request letters (approved, approved with conditions, not approved) and "A letter to an owner". A community without lots gets the rule reminder, the welcome and the general letter.

> BEFORE A LETTER ABOUT A VIOLATION
>
> The page reminds you, beside the wording: "Check your governing documents and your state's rules for any notice, cure period or hearing requirement before sending a letter about a violation." The starter letters contain no statute, fine or legal deadline. This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

Write a letter

1. Press **Write this letter** on the letter you want.

2 Under **1. Who is it to?**, search the roster by name or lot and press **Add** for each person. For someone not on the roster, press **Someone not on the roster, such as a renter** and type a name and mailing address. A letter to someone typed in is printed for the post, not emailed.

3 Under **2. The letter**, check the **Subject**, the **Date on the letter** (today unless you change it), **Who signs it** (an officer, "The Board of Directors", or **Someone else**) and the **Wording**. Changes here are for this letter only.

4 Read each letter under **3. How it reads**; the arrows step through the people on it. Then use any of the three buttons under **4. Send it**.

Words in curly braces fill in on each letter from the roster; the buttons under the wording insert them (**Owner name**, **Lot**, **Property address**, **Mailing address**, **Letter's date**, **Association name**, **Signer's name**, **Signer's title**). Words in square brackets are yours to replace. While any remain, the send buttons stay gray and say why, for example "Replace the words in square brackets first: [what was noticed, and when]." When the roster lacks a detail the letter uses, a box headed **Details the roster does not have** lets you type it for this letter only.

Print the letter	One page per letter, in lot order, with the address where a #10 window envelope shows it. Anyone with no mailing address is listed on a last page, for your file. Up to 400 letters at a time.
Email the letter	From your community's name followed by "via Governance Center", or from your own address if you set up a sending domain. Up to 50 households at a time, after a last check, "Email this letter now?", because an email cannot be taken back. **Also email the co-owners on file** sends co-owners the same letter.
File a copy in Records	Each letter is kept in Records, under Correspondence, for the board only. Up to 50 at a time; the **Subject** is its title there.

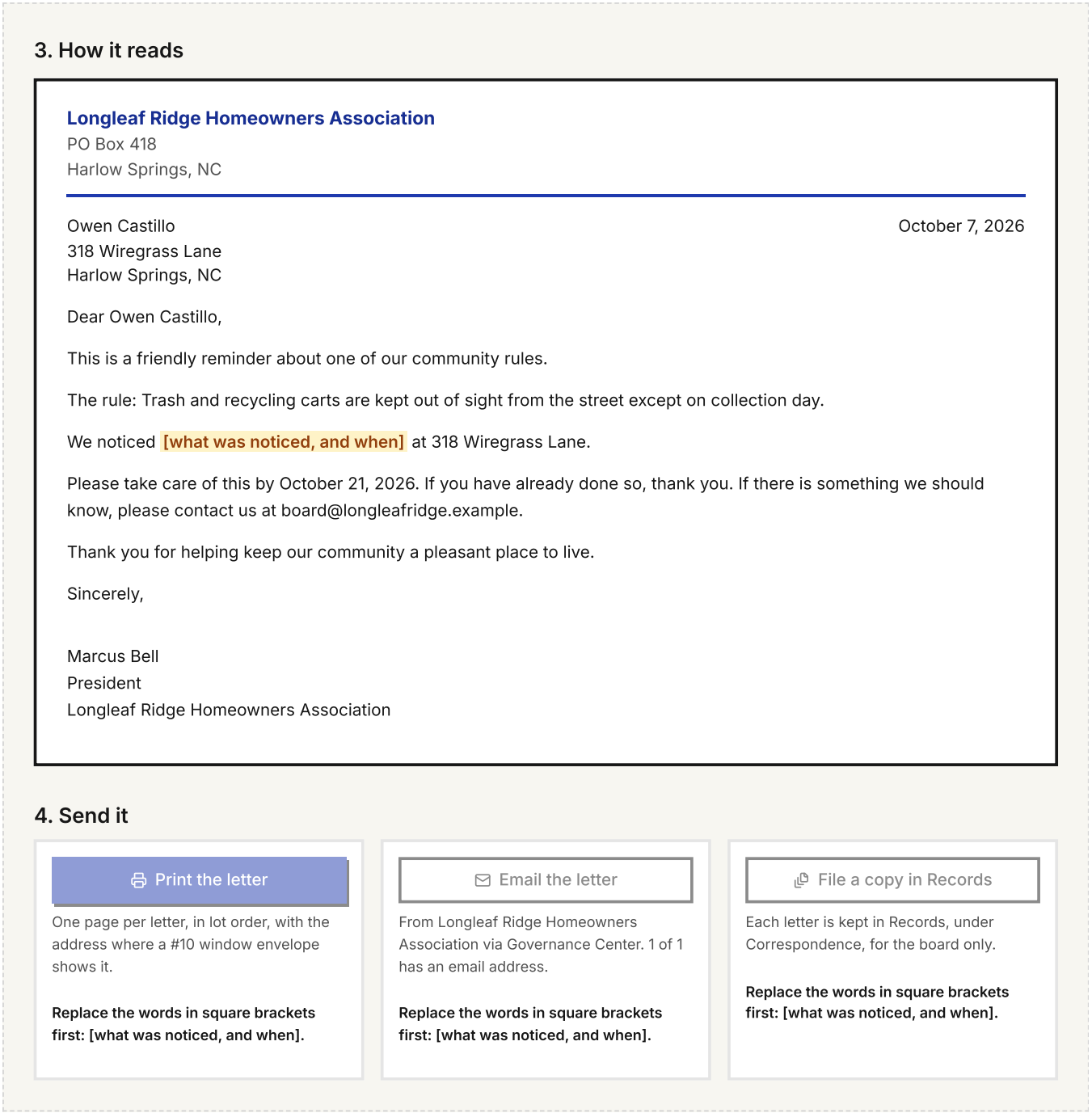


FIGURE 19.4 A rule reminder to Owen Castillo on the community's letterhead. One fill-in is still in square brackets, highlighted in the preview, so all three buttons wait.

Electronic consent drives

Electronic consent asks your owners for permission to send notices, agendas and ballots by email and text instead of by post. Each owner gets a personal link, reads your consent wording, gives an email address (and, if they like, a mobile number for text ballots) and signs, on a page like the one in Electronic signatures. There is no decline: an owner who does nothing keeps getting paper.

1 In **Notices**, **Electronic consent**, press **Start a consent drive**. Every owner on the roster is invited.

2. Check **What to call it** and **What your owners are agreeing to**. The wording is your association's, and it is locked once the drive opens. **Last day to respond (optional)** can stay blank.
3. Leave **Email the link now to everyone you have an address for.** ticked, and press **Open the drive and get the links**. The emails go out from Vote.Direct on your association's behalf.
4. Press **Download the links**. This is the only time the links can be shown. The file lists each owner's link and access code, which is how you reach owners with no email or phone on file.

The drive's page counts how many owners have said yes and lists **Who has answered** (Signed, Opened it or Not yet). **Remind** emails the owners who have not answered and have an address. **Download addresses** and **Certificate of completion** give you what was collected.

> CLOSING IS FINAL
>
> **Close the drive** asks you to confirm with **Close it for good**. Unused links stop working, and the drive cannot be reopened. What has been collected is kept and stays downloadable.

Members, requests and dues

The Owners room

Roster	Your people, as described in Voters and your roster.
Changes from owners	"When an owner sends new contact details from the member portal, they wait here. Nothing on the roster changes until you apply them."
Board and officers	"Who sits on the board, and when each seat comes up. Your bylaws set the term limits." Press **Add a seat** and fill in **Seat title**, **Seat number**, **Who holds it**, **Term started** and **Term ends**. An empty seat shows members "This seat is open." Written consents and letters use these seats.
Portal access	Who can sign in to the member portal, with counts of Active, Invited, Not invited and Suspended. Use **Invite all eligible**, or for one person **Invite** (later **Resend link**), **Copy portal link**, **Turn off links**, **Suspend** and **Restore access**. "Members sign in with an emailed link, so there are no passwords to reset."
Fields	Extra roster fields of your own.

Requests

Members ask the board from the portal. Each request gets a reference such as R-0042 and its own thread. The room shows "What owners have asked the board, and where each one stands." with three counts: Waiting on us, Past your target and Open.

- **Setup** holds **Let owners send requests from the portal** (off removes the section from the portal; threads already filed stay readable), **What owners can send** (the topics members choose from, each with "answer within" a number of days), and **What owners read before they write**.

- In a request you reply with **Send reply**, or tick **Board only, the owner never sees this** and press **Save note**. You set **Where it stands** (New, Working on it, Answered, Closed), **Your target date**, **Who is handling it** and **On a meeting agenda**, which adds a line to that meeting's agenda that members see on the portal. Closing asks **How did this end?**: Approved, Denied, Done, Withdrawn by the owner or No action taken.
- The **Realtors and title companies** tab collects document requests from outside the community: real estate agents, title and escrow companies, lenders, attorneys and owners who are selling. It gives you the link to your community's public request page to share.

The number of days for each topic is your association's own target, and 0 means no clock. The product notes that some states set their own clock on some of these topics. This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

Dues and assessments

The room sums itself up: "Record who has paid; reminders go to everyone else. No payment processing: members pay the way Longleaf Ridge Homeowners Association already collects." There are no card forms, and no money moves through Governance Center. You record the payments you receive.

1. Press **New assessment** (**New dues** for a club, nonprofit or congregation).
2. Fill in **Name**, **Amount per member**, **Due date** and **How members pay**, which "Goes verbatim into every reminder. Say exactly what you would tell a neighbor at the mailbox." Add an **Online payment link (optional)** if your bank or management company has a payment page.
3. Press **Create assessment**.

Reminders go automatically to whoever has not paid: 3 weeks before the due date, 1 week before, on the day, and 2 weeks after. Marking someone paid stops their reminders at once. Each member shows Paid, Exempt or Unpaid; an unpaid row has **Record a payment** and **Remind**. A member with no email address is marked "No email address. Reminders print instead.", and you can print **Statements for everyone** and **Reminder letters for the unpaid**. Members see their own standing in the portal.

Records

Records is your community's shelf: "Drop it in. Records names, sorts, tags, and retains it for you." Press **Add record**. For each record you choose **Who can see it**: **Members** ("Shared in the portal") or **Board only** ("Private working record"), and a retention period. **Export the year** makes "One PDF for the whole governance year: the board, the meetings, the minutes, the resolutions, the dues summary and the records index."

- **All records**, **Minutes**, **Resolutions** and **Bylaws and policies** are views of the same shelf.
- **Templates** holds blank governance forms.
- **State rules** shows the meeting rules the product holds for your community's state, such as notice for the annual meeting and board meetings. This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.
- **Signature requests** is where you send a PDF for signature (see Electronic signatures). A signed copy stays with its signature request. To keep one on the shelf too, download it and add it with **Add record**.

Forms returned

When a form mailing has gone out for your community (a nomination form, a proxy, a consent), every form that comes back is listed here, whether the owner signed it online, photographed it or posted it. Each mailing shows **Open** or **Closed**, counts for Returned, Emailed, Mailed, On the roster and any Set aside, and when it closes. **Forms returned** opens the list: who, when it was received, how, and the document itself, page by page, with **Refresh** and **Download the list**. A form received late is marked "After the deadline". **Who was sent to** lists everyone the mailing went to.

Community board, branding and settings

Community board

The Community room describes it as "The bulletin board inside your member portal: discussions, for sale & free, help wanted. You pin, you moderate." You turn it on in that room with **Turn on the community board**. When it is on, the room reads "The board is live in your member portal", with a **Turn off** link. Members post Discussion, For sale & free and Help wanted posts, and the board pins and removes posts.

Your logo and colors

In **Settings**, **Workspace**, the card **Your logo and colours** sets your community's mark and color "on your workspace, your member portal, your dues notices and your printed statements." Your letters' letterhead uses them too.

Logo	**Upload a logo**: PNG, JPEG, WebP or GIF, up to 2 MB. A wide mark reads better than a tall one.
Main colour	"Buttons, links, the active room in the menu."
Accent	"The rule above the menu and the count badges."

You pick the colors, and the product works out readable text colors to go with them and shows how they measure against a readability standard. Leave them alone and everything looks as it does now.

The rest of Workspace and Settings

Workspace also holds the preset, the **Modules** card (Community, Requests and the money room, each On or Off, with **Open**, or **Turn on**, which takes you to the page where you start it) and **Open member workspace**, which shows you the portal the way members see it. For the other Settings tabs, see Settings reference.

The member portal

Each community has a private portal for its members at `app.governance.center/c/` followed by the community's short name. Members need no password. They open the personal link from their invitation, or press **Sign in with email** and then **Email me a sign-in link**, using the email address your roster has for them.

The header shows the community's logo (or its initials) and name, "Call or text (512) 222-8191", and, for a member signed in with an account, **My communities** and **Sign out**. Below it, a welcome band in your community's color greets them by name ("Welcome back, Harold."). Then come, in this order:

For you	Cards for what needs them: a ballot to cast (**Open my ballot**, or **Sign** for a written consent); an assessment that is due, with your payment instructions and **Pay online** when you gave a payment link; and a request the board has answered (**Read the reply**). Under the cards, **All set** lists what is done, such as "You voted on" a date, Paid or Exempt. **Print my assessments** prints the member's own standing.
Upcoming meetings	The community's scheduled meetings, with **Yes**, **No** and **Maybe** for meetings that take RSVPs.
Announcements	What the board has sent.
My requests	**Ask the board** opens a form: **What is this about?** (the topics you allow), **In one line**, **The details** and an optional photo, then **Send to the board**. The page shows the reference, for example "Filed as R-0043.", and the member's past requests with where each stands.
My voting history	Closed votes they were part of. "This shows whether your ballot was received, never what you chose. Ballots are secret."
Documents	Records shared with members, grouped under Governing documents, Meeting minutes, Money, Elections, Insurance and contracts, Notices and letters, and Other records, with a **Find a document** box when there are more than five.
Your board	The seats and who holds them.
Community Board	A card that opens the board (**Open the board →**) when it is on.
Your details	**Update my details**, for a member who moved or has a new email or phone. The change waits in Changes from owners until you apply it.

On a computer, Documents, Your board, Community Board and Your details sit in a column at the right; on a phone they follow below. When you open the portal yourself with **Open member workspace**, a Preview bar says you are seeing the page the way members see it. Ballots, voting history, requests, RSVPs, dues standing and contact details belong to one member each, so the preview leaves them out or switches them off.

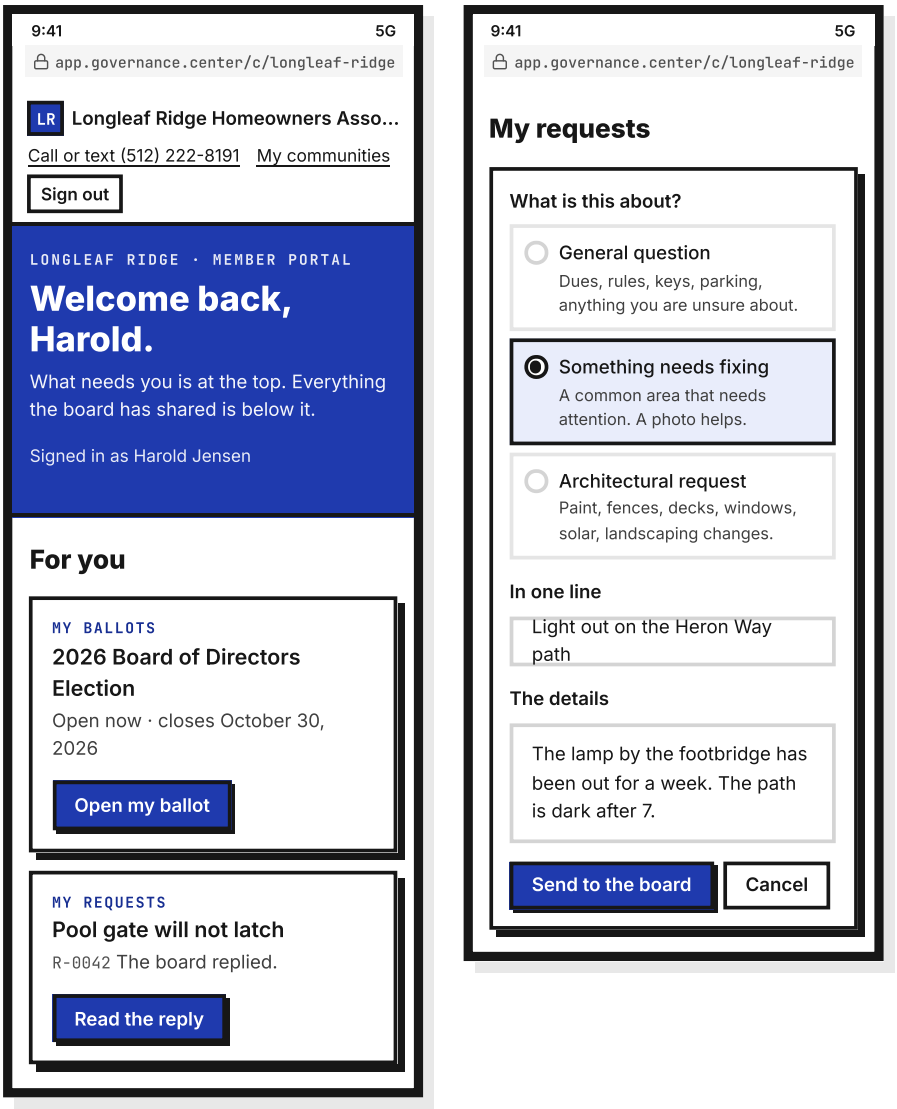


FIGURE 19.5 Harold Jensen's portal on a phone: what needs him first, and a new request to the board. The topics are the ones the board allows; the photo field sits below the details.

When a plan lapses

If the plan behind a community stops, because it was canceled, is unpaid or past due, or is paused, nothing is deleted and the menu stays exactly as it was. A bar across the top of every page says so. The owner's bar has **Restart the plan**, which opens Billing. Everyone else's has the support number, because only the owner can restart the plan. A community that never had a plan does not see this bar.

Members see the same thing in the portal: "Read-only: posting and RSVPs are paused. Everything published stays available, and your ballots are unaffected."

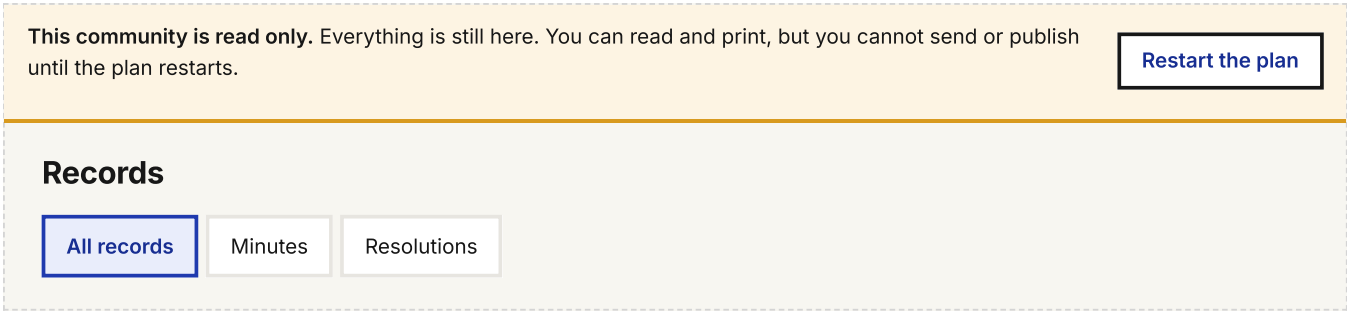


FIGURE 19.6 The bar the owner sees after a plan lapses. The rooms and records stay where they were.

PART FOUR

Your account and help

Your team and what each role can do, how billing works, every settings page, answers to the problems people meet most, how to reach us, and a glossary of the terms in this guide.

CHAPTER 20

Team and roles

Invite the people who help you run elections, give each one a role, and know what each role can really do, so the right person creates each election.

IN THIS CHAPTER

- The four roles
- Invite someone
- Accept an invitation
- Change a role or remove someone
- What each role can do
- Practical advice

The four roles

Your team is everyone who shares a workspace (see Workspaces). Each person has one role in each workspace, and the role applies to the whole workspace, not to single elections. You manage the team in **Settings**, **Team**, and the workspace switcher shows your own role beside each workspace's name.

Owner	The person who created the workspace. Each workspace has exactly one owner. The owner's role cannot be changed, the owner cannot be removed, and ownership cannot be handed to someone else. Only the owner can open Billing.
Admin	Runs every election in the workspace: closes, cancels or deletes it, sees its results before voters can on every election, and downloads its records. Manages the workspace with the owner: the team, the workspace's settings, People and announcements.
Editor	Edits any election in the workspace: its ballot, settings, schedule and voters. Publishes it and sends invitations and reminders. Can run live meetings.
Viewer	Can open the workspace's elections and see their voter lists, and their results once voters can, or sooner when an election shares its results with everyone on the team, but cannot change or send anything for elections other people created. A viewer can still create and publish elections of their own.

One more idea matters as much as the role: the **creator** of an election, the person who made it. The creator can do everything on that election, whatever their role. A few things stay with the creator alone: the election's own web address, its roster request link, asking for a free election, seeing and revoking vote.direct support access, and paying for it by card. The table in What each role can do lists the rest.

> GOOD TO KNOW
>
> The Team page shows what each role can do as a table, with a one-line summary beside each role, and the invitation email lists what the invited role can do. Both describe the same rules as this chapter.

Invite someone

Owners and admins can invite people. Editors and viewers do not see the **Invite** button.

1. Open **Settings**, **Team**. The page heading names your workspace and counts its members, for example "Longleaf Ridge Homeowners Association · 2 team members".
2. Press **Invite** at the top right. On a phone the button shows only its icon.
3. Under **Invite Team Member**, type the person's **Email address**.
4. Under **Role**, choose **Admin**, **Editor** or **Viewer**. Editor is chosen at first. There is no Owner choice.
5. Press **Send Invite**. A message confirms "Invitation sent to" the address.

The invitation then waits under **Pending Invites**, with the date it was sent and its role. Everyone else on the team gets a "Team invitation sent" notification.

- Invitations never expire. The link in the email works until it is used or you cancel the invitation.
- To cancel, press the trash icon on the pending row. The confirmation is worded like removing a member, "Remove *address* from *workspace*?", and its button reads **Remove member**.
- There is no resend button. To send a fresh email, cancel the invitation and invite the address again.
- An address that already has a pending invitation gets "An invitation is already pending for this email address". An address that already belongs to the team gets "User is already a member or has a pending invite".
- An admin can invite a new admin, even though only the owner can promote an existing member to admin.

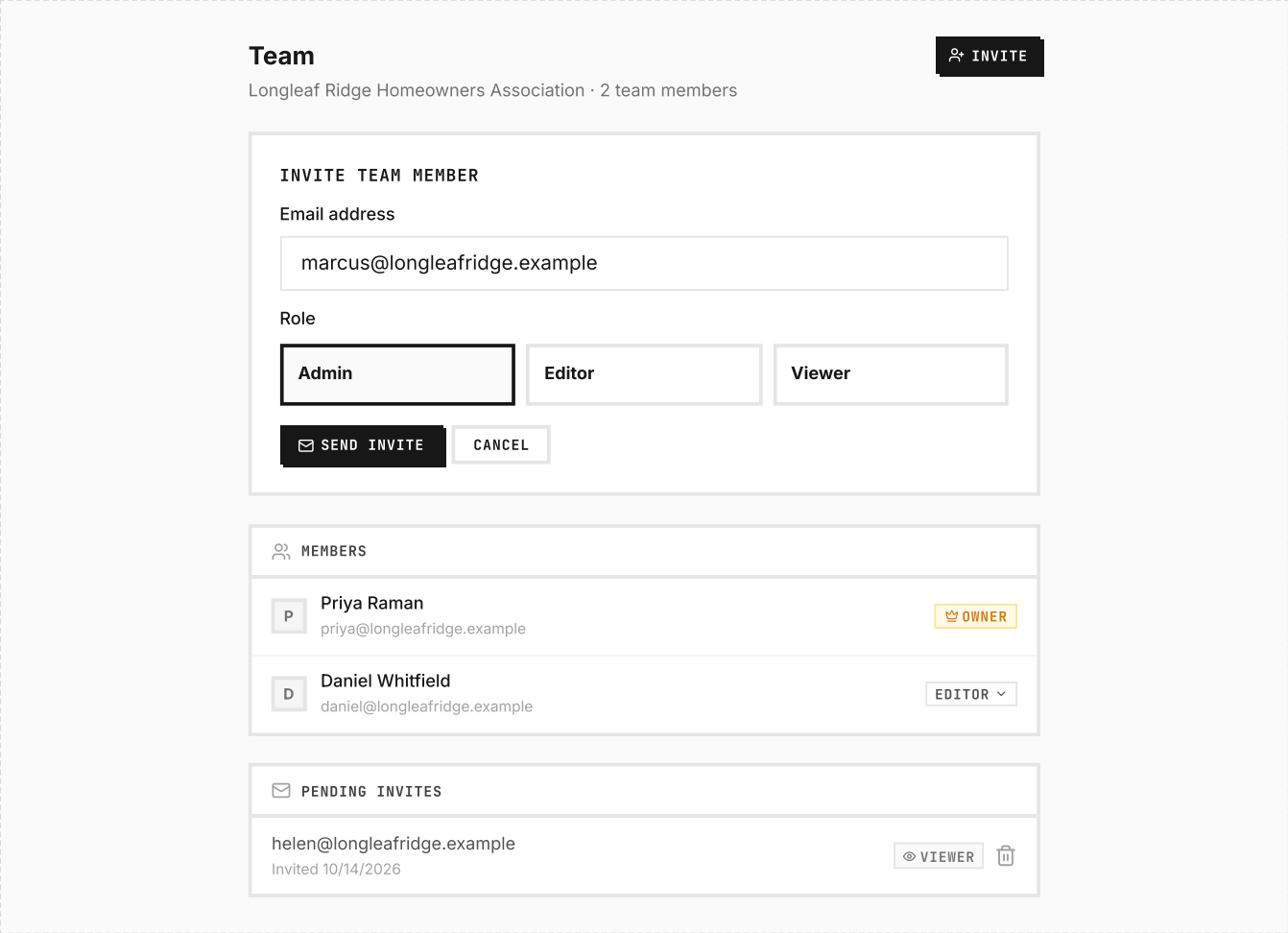


FIGURE 20.1 The Team page as the owner sees it, with the invitation form open for an admin. The role summary table that sits above the form, and the one-line description on each role card, are left out; this chapter's table is the accurate list.

The invitation email

The invitation comes from "vote.direct" with the subject "You've been invited to *your workspace* on vote.direct". It names the person who sent it (by their email address), the workspace and the role, and has a green **Accept Invitation** button. It also has one line about what the role can do; use the table in this chapter instead. The button leads straight to the invitation, not to the confirmation page described in Why email links open a page with a button.

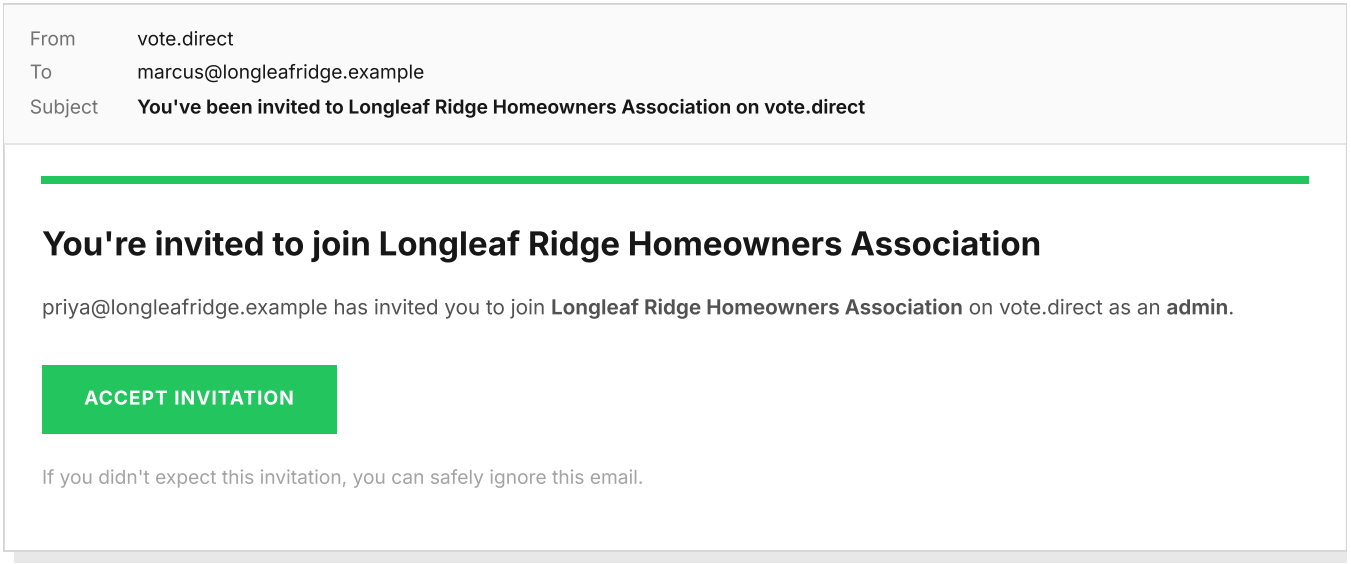


FIGURE 20.2 The invitation Marcus Bell receives. The line describing what an admin can do is left out of this drawing; see the table later in this chapter.

Accept an invitation

This part is for the person who was invited.

1. Press **Accept Invitation** in the email.
2. If you are not signed in, vote.direct asks you to sign in first. Use the address the invitation was sent to. If you have no account yet, press **Create one** on the sign-in card and sign up with that same address, or with the Google account for that address (see Create your account). After you confirm, vote.direct brings you back to the invitation.
3. The page shows **Accepting invitation...**, then "Welcome to *workspace*!". Press **Go to Dashboard**.
4. Open the workspace switcher in the header and choose the team's workspace. Until you do, Home can keep showing your own workspace instead.

Everyone else on the team gets a "Team invitation accepted" notification naming your address and role.

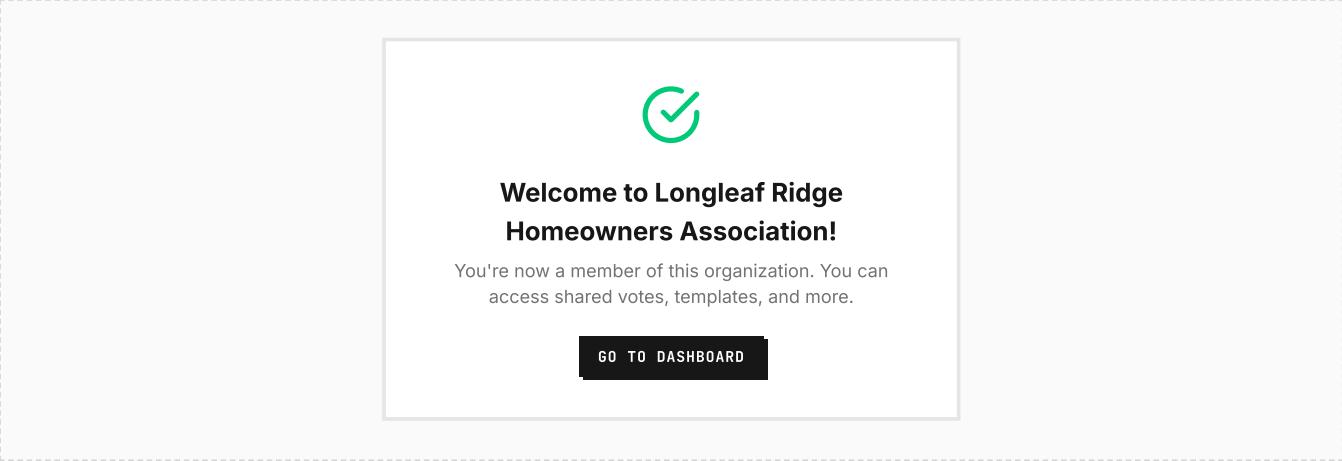


FIGURE 20.3 The confirmation an invited person sees after accepting. Choosing the team's workspace in the switcher is the next step.

If the invitation cannot be accepted, the page reads **Invitation Error** with one of these messages:

Message	What to do
This invite was sent to *address*. Please sign in with that email.	You are signed in with a different address. Press **Sign Out** in the header, then open the invitation again and sign in with the invited address.
Invite not found or already used	The link was already used, or the invitation was cancelled. Ask an owner or admin for a new invitation.
Invite already accepted	Nothing to do. Choose the workspace in the switcher.
You are already a member of this organization	Nothing to do. Choose the workspace in the switcher.

The error page has **Sign In** and **Dashboard** buttons. Because you are already signed in, **Sign In** takes you to your dashboard; to change accounts, use **Sign Out** in the header first.

Change a role or remove someone

Owners and admins manage the members list on the Team page. Everyone else sees each member's role as a colored label: **Owner** (amber, with a crown), **Admin** (blue), **Editor** (green) and **Viewer** (gray).

Change a role

Beside every member except the owner, owners and admins see a small button with the member's role and a down arrow. Press it and choose the new role:

- The owner can choose admin, editor or viewer.
- An admin can choose editor or viewer. An admin can lower another admin's role, or their own, but cannot make anyone an admin.
- The owner's role cannot be changed.

The change takes effect at once, and the other members get a "Team role changed" notification.

Remove someone

Point at a member's row to show its trash icon (on a phone the icon is always shown, slightly faded). Press it. The confirmation asks "Remove *name* from *workspace*?" Press **Remove member**. The owner cannot be removed.

A removed member loses the workspace from their switcher. They keep control of any election they created there, because the person who created an election can always act on it. The workspace's owners and admins can act on it too. You can invite them again later.

Admins can remove themselves the same way, which takes them out of the workspace. Editors and viewers have no button to leave; an owner or admin removes them.

What each role can do

This table describes what vote.direct allows today. Two rules explain most of it. First, the person who created an election can do everything on it, whatever their role. Second, the role decides the rest: owners and admins run every election and manage the workspace (its team, People, announcements and settings), editors change any election and send its ballots, and viewers look.

In the table, "Own" means only for elections that person created.

Action	Owner	Admin	Editor	Viewer
Open the workspace's elections and see their voter lists	Yes	Yes	Yes	Yes
Create an election in the workspace	Yes	Yes	Yes	Yes
Publish an election	Yes	Yes	Yes	Own
Add or edit voters, send invitations, reminders and text notices	Yes	Yes	Yes	Own
Edit the ballot, settings or schedule	Yes	Yes	Yes	Own
Close early, cancel or delete an election	Yes	Yes	Own	Own
Paper and mailed ballots, the inspector of elections, printable notices and voting codes	Yes	Yes	Own	Own
Export results, download the certificate and audit package, see the audit log	Yes	Yes	Own	Own
See results on an election's page before voters can	Yes	Yes	Own	Own
Duplicate an invite-list election	Yes	Yes	Yes	Yes
Run a live meeting	Yes	Yes	Yes	No
See the People list	Yes	Yes	Yes	Yes
Add, import, edit, delete or export People	Yes	Yes	No	No

Action	Owner	Admin	Editor	Viewer
Send announcements	Yes	Yes	No	No
Invite people to the team	Yes	Yes	No	No
Change roles	Yes	Editor or viewer only	No	No
Remove members	Yes	Yes	No	No
Change Organization settings and the Sending Domain	Yes	Yes	View only	View only
Open Billing	Yes	No	No	No
Profile, Security, Ballots, Notifications and AI agents	Each person, for themselves			

- An election's page shows each teammate only the buttons their role allows. If someone reaches an action their role does not allow, vote.direct refuses it and says who can do it.
- The results panel on an election's page shows the tally at any time to the person who created the election and to owners and admins. Editors and viewers see results whenever the election's results settings let voters see them, on invite-list elections too.
- Announcements also need a plan that includes them and a verified sending domain (see Announcements).
- Viewers on the Organization page see the settings with a note, "You can view these settings. An owner or admin must make changes." On the Sending Domain page they see "Owner or admin access required" instead.
- Anyone other than the owner who opens Billing sees a page saying the workspace manages billing, with a **Back to your elections** link. If the workspace has a plan, it covers elections that teammates publish in the workspace. Paying by card for a single election is done by the person who created it (see Billing and payments).
- Removing a member does not take away control of the elections they created.

Practical advice

- **Make the people who run elections admins.** Owners and admins can close, cancel or delete any election in the workspace and download its records, whoever created it. If Priya creates the 2026 Board of Directors Election and is away on closing day, an admin can close it early and download its certificate.
- **Plan for people stepping down.** An election cannot be handed to another person, but the workspace's owners and admins can run it to the end and download its records after its creator leaves. If no one else in the workspace is an owner or admin, write to support@vote.direct.
- **Choose roles by the work.** Make people who load the roster, send invitations and chase late voters editors. Make people who manage the team, People, announcements or the sending domain admins. Make people who only need to look viewers.
- **Viewer is not read-only.** A viewer can create and publish elections of their own, and as creator controls them fully. Give the Viewer role to people you trust with that.

- **Inspectors do not need a team role.** An inspector of elections gets a private link to the election they oversee (see Inspectors and state rules).
- **Ask an owner or admin for records.** Exports, the certificate and the audit package come from the person who created the election or from an owner or admin. Ask one of them to share the certificate or an export with the board.

CHAPTER 21

Billing and payments

How vote.direct charges for an election, where you see the price before you pay, how to pay from your balance or by card, what happens when your list grows, and how refunds, receipts and subscriptions work.

IN THIS CHAPTER

- How an election is paid for
- Nothing is charged while you build
- Where you see the price
- Paying when you publish
- Coming back from checkout
- Adding voters after you pay
- Cancelling and refunds
- Your prepaid balance
- The Billing page
- Billing History and receipts
- Subscriptions
- Extras, live meetings and surveys

This chapter does not print prices, because they change. Every figure is on vote.direct/pricing, and the product shows the price for your own election before you pay anything. In the screens drawn here, the words **Your price** stand where your screen shows an amount.

How an election is paid for

An election with an invite list is paid for in one of three ways. The invite list, also called the roster, is the list of people allowed to vote.

Way	Which elections	What you pay
Free	25 voters or fewer.	Nothing. Free elections send email only, never text messages.
One-time price per election	26 to 5,000 voters.	One price for the whole election, set by the size of your list. You pay it once, when you publish.
Subscription	Every invite-list election while your plan is current.	The plan's monthly or yearly price, and no price per election. See Subscriptions.

The one-time price comes from bands of list size. You pay for the band your list falls in, whatever the turnout. Some screens name the band, for example "the Standard tier".

Band	Voters on the list
Free	25 or fewer
Nano	26 to 50
Micro	51 to 100

Band	Voters on the list
Small	101 to 200
Standard	201 to 400
Large	401 to 1,000
Extra large	1,001 to 2,000
XXL	2,001 to 5,000

Above 5,000 voters there is no self-serve price. The product shows **Custom quote** and asks you to contact us for a quote.

What counts as a voter. The fee charged at publish counts the ballots on your list. Co-owners of one home who share a single ballot count once.

> QUOTED LESS ELSEWHERE?
>
> If another provider has quoted you less, see the price-beat offer on vote.direct/pricing.

Nothing is charged while you build

Building the ballot, adding your list, previewing and saving drafts cost nothing. After you save, the **Draft saved** page says so: "Nothing goes out and nothing is charged until you publish."

Test ballots are free too, up to five per election. Email tests work on every election; a text test needs an election that has a price (more than 25 voters) or that your plan covers. A test mailed as a paper packet is charged like a real packet. When your election has a price, Review offers **Save draft to test first** under the heading **Want a dry run first?** See Test, then publish.

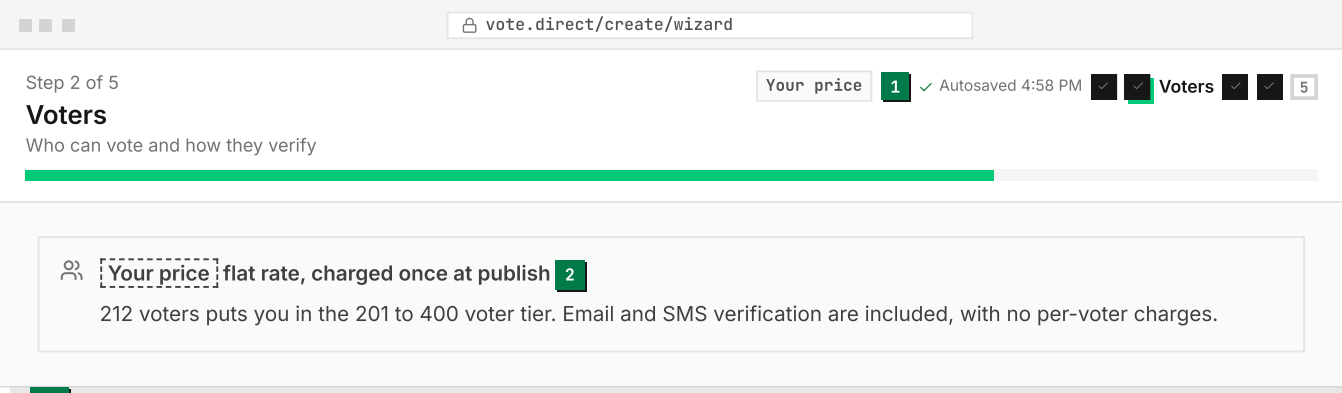
Where you see the price

The wizard shows the price in three places: the header badge at the top right of every step, a panel at the bottom of the Voters step, and the **Vote Cost** card on Review. On a wide screen, the **Publish checklist** beside the wizard repeats it as **Publish price**.

Your list	Header badge	Voters step panel
Nobody on it yet	**Set by your list**	**Nothing to pay yet**
25 voters or fewer	**Free**	**This election is free**
26 to 5,000 voters	The price for your list	The price, followed by **flat rate, charged once at publish**
Covered by your subscription	**Included in plan**	**Included in your plan**

Your list	Header badge	Voters step panel
More than 5,000 voters	**Custom quote**	**Custom pricing for elections this size**, with an **Ask for a quote** button

For a paid election the panel also names your band and notes that email and SMS verification are included. The free panel notes that text messaging comes with paid elections.



1 The header badge. It shows on every step of the wizard.

2 The price panel at the bottom of the Voters step, with your band.

FIGURE 21.1 The Voters step of the 2026 Board of Directors Election with 212 voters; your screen shows the one-time price for your list wherever the figure says Your price.

When your list is in and nothing else blocks publishing, a green box under the price reads **Your list is in. This election is ready to go live.** Its **Review and pay** button, which carries the price, takes you to Review. Nothing is charged on the Voters step.

Paying when you publish

You pay when you publish, and only then. An election needs at least one voter on its list to publish: with nobody on the list, publishing is refused until you add voters.

From your prepaid balance

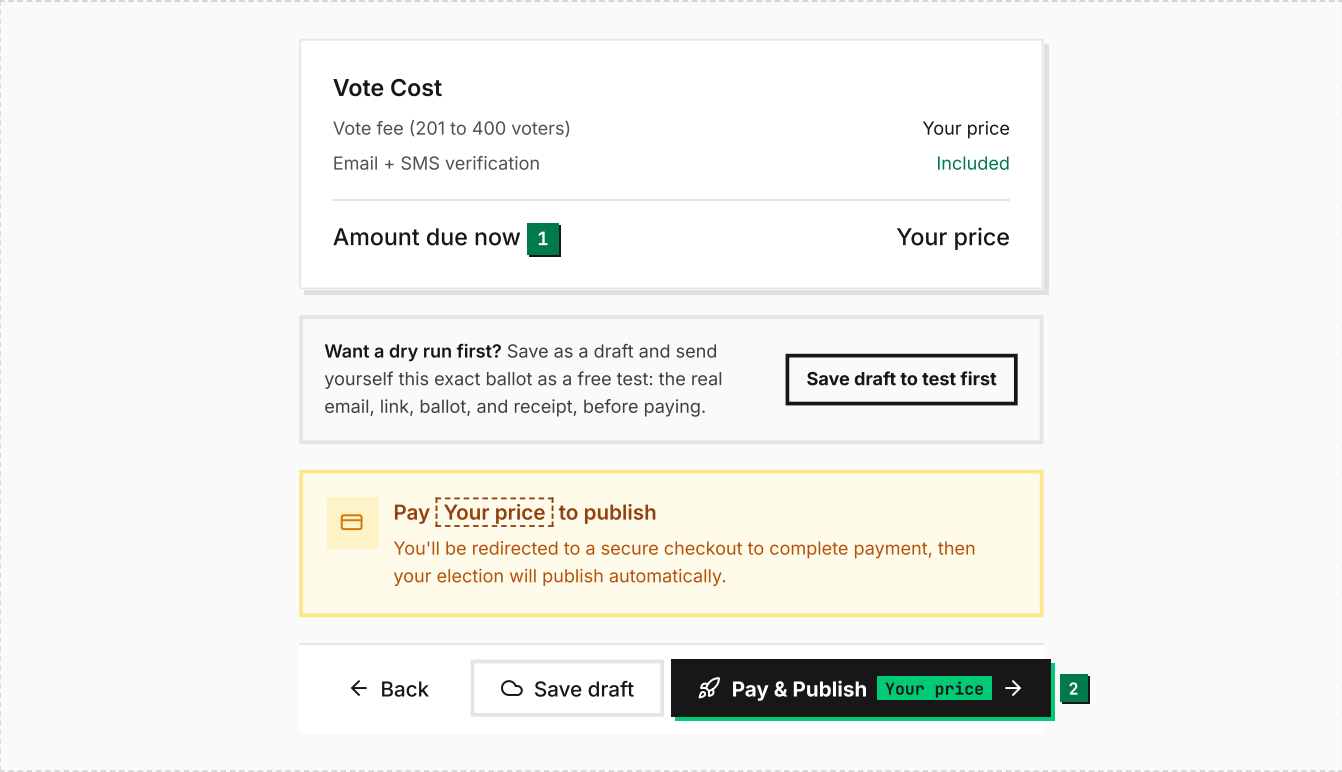
If your prepaid balance covers the whole fee, the **Vote Cost** card says the fee comes from your balance, a green box reads **Ready to publish**, and the button at the bottom right reads **Publish Vote** with the price on it. Pressing it publishes the election and takes the fee from your balance in the same step.

A balance that covers only part of the fee is not used at all. In that case you pay the whole fee by card.

By card, on the secure checkout page

1 On Review, read the **Vote Cost** card. **Amount due now** is the whole fee for your list. Below the card, an amber box headed with the fee to pay says you will be redirected to a secure checkout, and that your election will then publish automatically.

2. Press **Pay & Publish** at the bottom right. vote.direct saves your election as a draft first, so nothing is lost if you leave the checkout page.
3. The secure checkout page opens. It is run by our payment processor and shows your election's title with a line such as "Election fee (Standard tier, 212 voters)". Enter your card details and pay.
4. You return to vote.direct, which publishes the election for you. See Coming back from checkout.



1. The whole fee for your list, due when you publish.
2. Saves the election as a draft and opens the secure checkout page.

FIGURE 21.2 The bottom of the Review step for a 212-voter election paid by card; your screen shows the fee wherever the figure says Your price.

The checkout page takes cards. It also has an **Add promotion code** link, for a code we have sent you. A code works only on that page: if your balance covers the fee, publishing takes the fee from your balance and the checkout page does not open.

> WHO CAN PAY
>
> Only the person who created the election can pay for it on the checkout page. A teammate who publishes it pays from their own prepaid balance. See Team and roles.

More than 5,000 voters. Self-serve elections go up to 5,000 voters. Above that, Review shows **Custom setup required** with a **Contact us for a quote** link instead of a price.

Coming back from checkout

After you pay, the screen reads **Publishing your vote...** while vote.direct confirms the payment and publishes. When that succeeds, a message reads **Vote published!** and you land on the page where you send your voters their ballots. See Invitations and reminders.

If the election cannot publish, your payment stays with it. A message reads **Payment received, but the election has not published yet**, and the **Draft saved** page shows a card naming the problem, with a button to the page where you fix it. Once it is fixed, publish from the election page. You are not charged a second time.

The card says	What to do
The voter list outgrew the tier you paid for	Remove voters to fit the band you paid for, or cancel the draft for a refund and publish again at the new size. See Adding voters after you pay.
Fix the voting window	Move the close date on the election page, then publish again.
Choose how paper ballots are handled	Choose who prints and mails the paper ballots on the **Paper ballots** page. See Paper, mail and in-person ballots.
Payment still being confirmed	The election has not yet learned of your card payment. Open the election page and publish once it shows as paid. If it still asks for payment after a few minutes, contact support.

If you go back from the checkout page without paying, nothing is charged. You return to the **Draft saved** page, and a message reads **Checkout cancelled**: "Your draft is saved. You can pay and publish when ready."

Paying later from the draft

A saved draft shows a **Publish checklist** card on the **Draft saved** page and on the election's own page. When your balance is short, its **Payment** row reads the price followed by **due at publish · card or balance**, and its main button reads **Pay & publish** with the price on it. That button opens the same secure checkout. When your balance covers the fee, the button reads **Publish now** instead.

Adding voters after you pay

A one-time price is paid for a band, so what you pay when your list grows depends on where the new total lands.

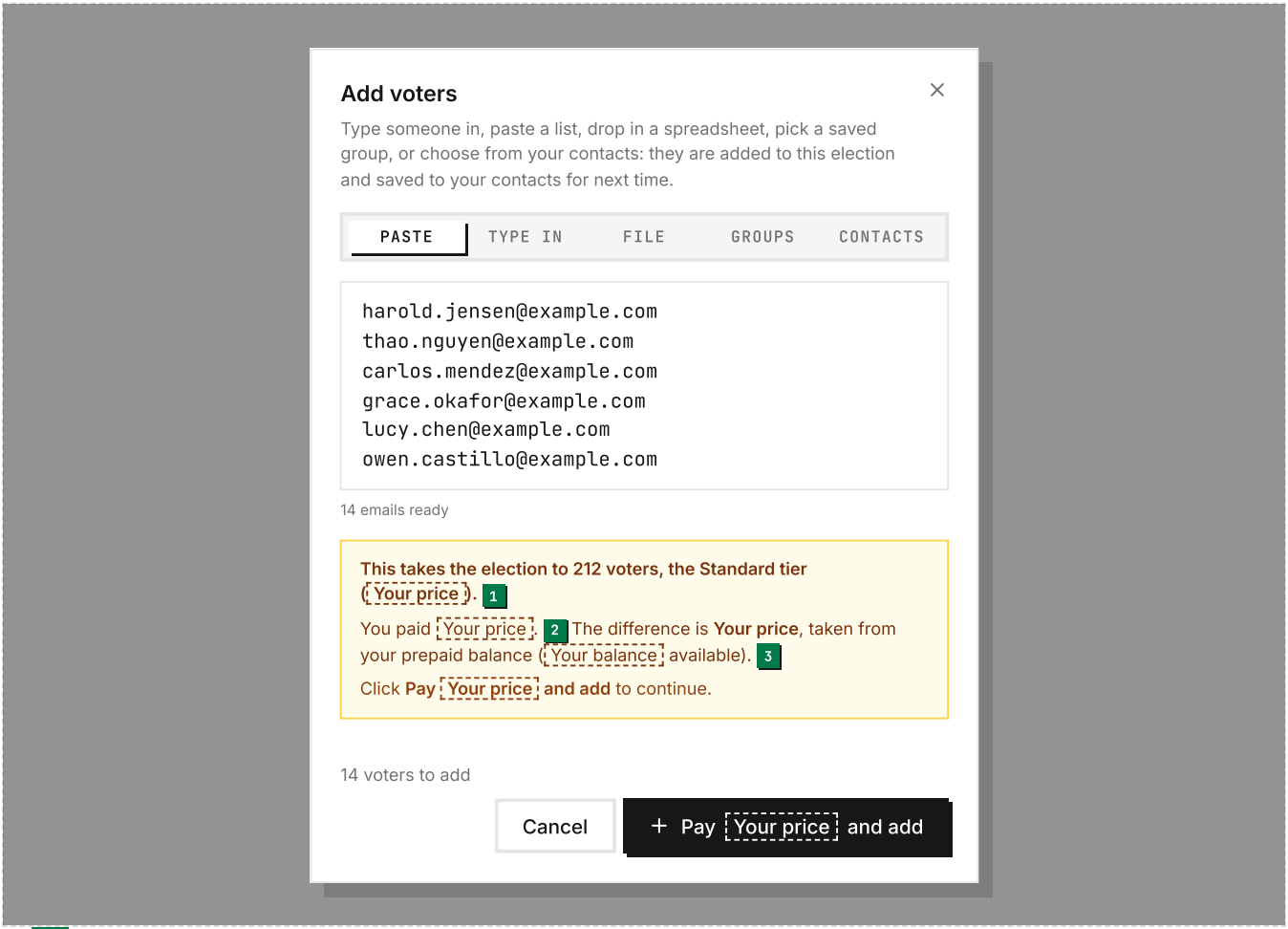
- **Inside the band you paid for:** nothing more to pay. An election paid in the 201 to 400 band can grow to 400 voters at no charge.
- **Into a bigger band:** you pay the difference between the new band's price and what you paid. It comes from your prepaid balance, before the voters are added.
- **A free election that grows past 25 voters:** you pay the price of the band it moves into.
- **Past 5,000 voters:** the add is refused with "Elections with more than 5,000 voters require enterprise pricing." Contact us for a quote.
- **With a current subscription:** adding voters costs nothing.

1 Open the election, go to its **Voters** tab and press **Add Voters**.

2 Enter the new voters on any tab. If they take the list into a bigger band, a note names the new band and warns that you will be asked to confirm the difference before they are added.

3 Press the add button. The panel in the figure below shows the new band, what you paid and the difference.

4 Press the button that reads **Pay**, then the difference, then **and add**. The difference comes from your balance first, then the voters are added.



1 The price of the band the larger list falls into.

2 What you paid when you published.

3 The difference, and your prepaid balance that it comes from.

FIGURE 21.3 Adding 14 voters to an election paid for 198 voters moves it from the 101 to 200 band into the 201 to 400 band; your screen shows each amount where the figure says Your price or Your balance.

The difference can only come from your balance; this step has no card option. If your balance does not cover it, the panel says "Your balance does not cover it. Add funds, then add these voters." Add balance first (see Your prepaid balance), then add the voters again.

Mail-only voters added through paper ballot setup follow the same rules.

> **A PAID DRAFT THAT GREW**
>
> If you paid for a draft and its list then grew into a bigger band, publishing is refused. Remove voters to fit the band you paid for, or press **Cancel and refund** (see the next section) and publish again. The new fee is charged at the new size.

Cancelling and refunds

Cancelling is on the election page. Open its **Settings** tab and find the card titled **This election**.

Your election	What to press	What happens
Paid for, never published	**Cancel and refund**	The fee goes back to where it came from. The draft, its ballot and its voter list stay saved. Publishing it later charges the fee again.
Live, nobody has voted	**Cancel election**	Voting ends now. Each payment goes back to where it came from: the card it was paid with, or the account balance it was paid from.
Live, ballots cast	**Cancel election**	Refused with **Cannot cancel automatically**. Contact support@vote.direct.
Scheduled, not yet open	No cancel button	Contact support@vote.direct.

A confirmation window opens when you press the button. It names how much goes back and where: to the card it was paid with, to the account balance it was paid from, or to each, when part was paid by card and part from a balance. When nothing was charged, it says there is no fee to refund. Press **Cancel election** (on a paid draft, **Cancel and refund**) to go ahead, or **Keep election** to back out. The person who created the election, and the workspace's owners and admins, can cancel it. The refund goes back to whoever paid.

> **DELETE IS NOT A REFUND**
>
> The same card offers **Delete** on an election that is not live. Deleting removes the election from your dashboard but does not refund its fee. To get the fee back on a paid draft, use **Cancel and refund**.

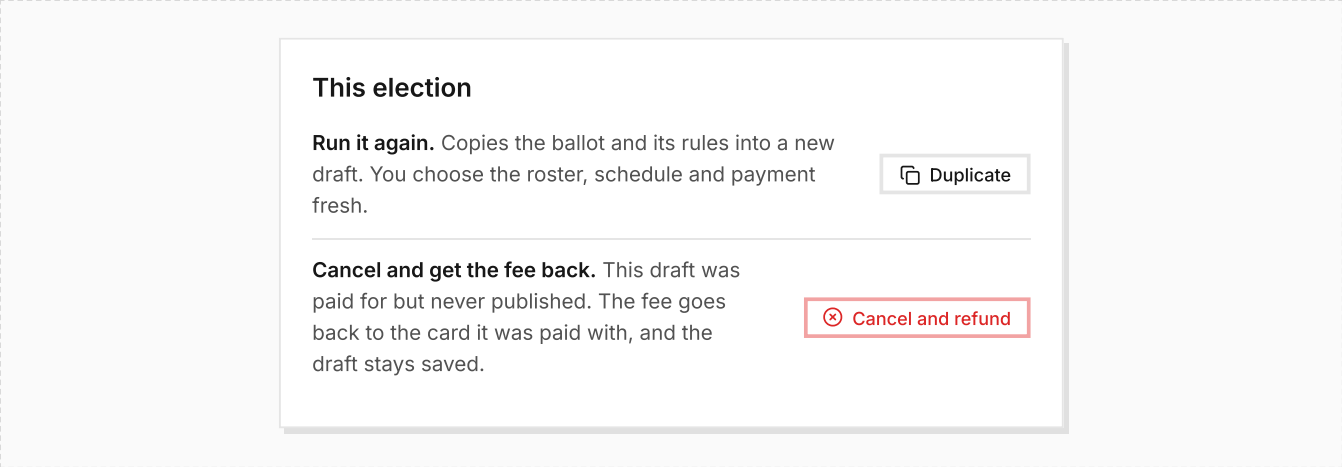


FIGURE 21.4 The This election card on the Settings tab of a draft paid by card; Cancel and refund returns the fee to that card and keeps the draft. On a draft paid from a balance, the sentence names the account balance instead.

Where the money goes

A refund goes back the way you paid, payment by payment. A card payment is refunded to that card; when it shows on your statement depends on your card issuer. A payment from a balance, including the difference paid when a list grew into a bigger band, is credited back to the balance of the account that paid it and listed in that account's Billing History. An election paid partly by card and partly from a balance is refunded both ways, and the message after cancelling names each amount.

Paper mailings are charged from your balance when you send them. If we decline a mailing, or it cannot be sent, its charge returns to your balance automatically.

Your prepaid balance

Your prepaid balance is money you add to your account ahead of time. It belongs to your own sign-in, not to the workspace. It pays an election fee or a live meeting's fee when it covers the whole fee, and it is the only way to pay the difference when a list grows, printed ballot packet mailings, and the fee for your own domain.

Adding balance on the Billing page

1. Open the Billing page (see The Billing page) and find **Add Balance**.
2. Press one of the preset amounts, or type an amount under **Or enter a custom amount** and press **Add Balance**. The page shows the smallest and largest amount it accepts.
3. Pay on the secure checkout page. You return to the Billing page, and the new total shows under **Available Balance** once the payment is confirmed. If it has not changed yet, reload the page in a moment.

Adding funds from a draft

When a draft's **Publish checklist** shows that money is missing, press its **Payment** row. An **Add funds** panel opens in place, showing the amount due and your balance, with preset amounts (the smallest that covers what is due is already selected) and a **Custom** option. Its button reads **Add**, the amount, and **to Account**. After

checkout you come back to the election's page. **Not now** closes the panel.

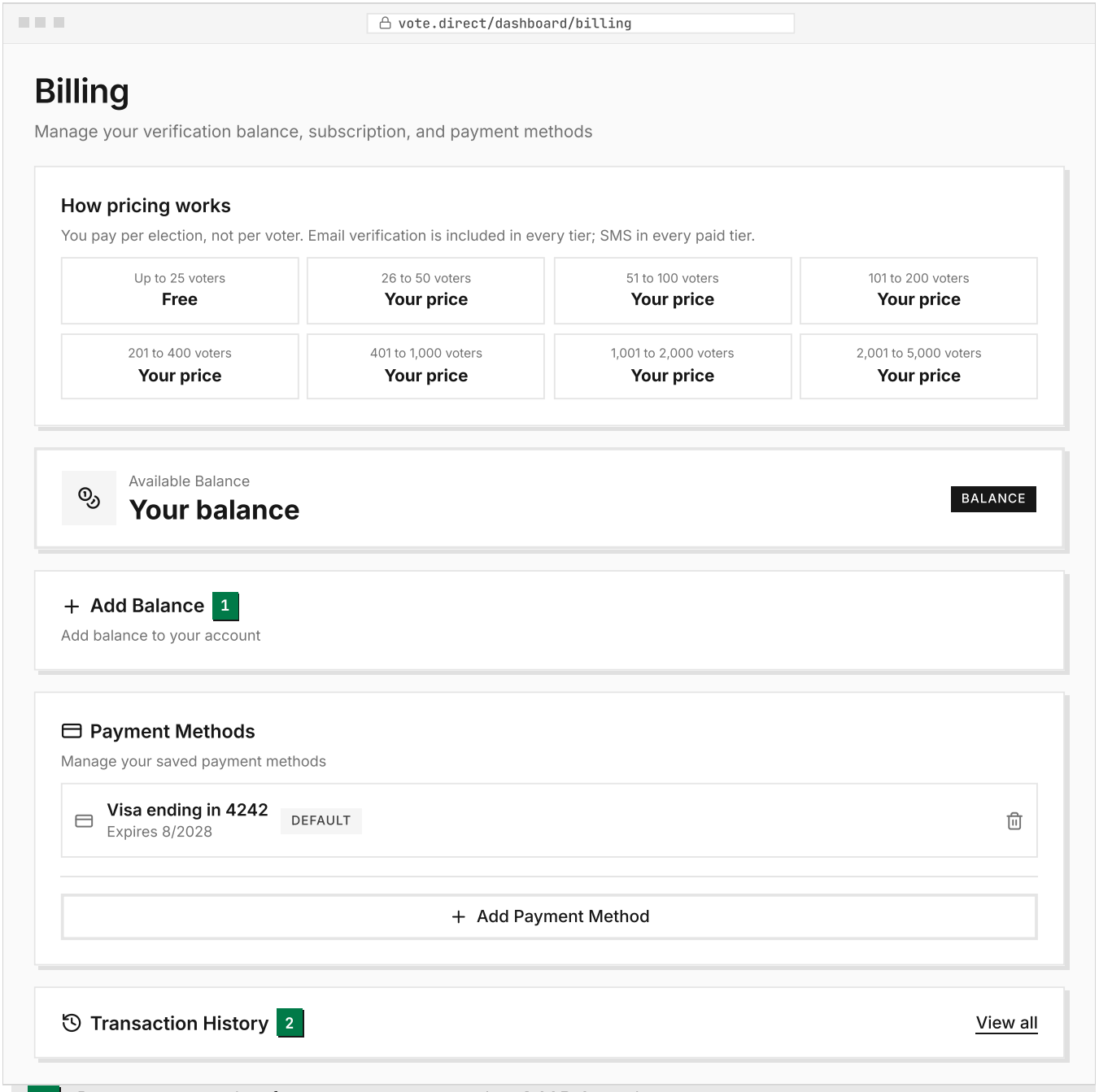
> GOOD TO KNOW
>
> With a subscription, the Billing page hides **Available Balance** and **Add Balance**. If an extra on a draft needs money, use **Add funds** on the draft's **Publish checklist**.

The Billing page

Open Settings (the gear at the top right, or **Settings** in the menu on a smaller screen) and choose **Billing**, described as **Plan and payments**. The address is `vote.direct/dashboard/billing`.

Only the workspace owner can use the Billing page. Other team members see a note instead, for example "Longleaf Ridge Homeowners Association manages billing for this workspace". What the owner sees depends on whether there is a subscription.

Section	What it holds	Shown
Your plan	The plan's name, **Annual** or **Monthly**, the renewal date, and **Manage** and **Cancel**.	With a subscription
How pricing works	Every band with its price, as on the pricing page.	Without a subscription
Available Balance	Your prepaid balance.	Without a subscription
Add Balance	Preset amounts and **Or enter a custom amount**.	Without a subscription
Payment Methods	Your saved cards and **Add Payment Method**.	Always
Transaction History	Your latest balance transactions and **View all**.	Always



1 Preset amounts, a box for your own amount, and an **Add Balance** button.

2 Your latest balance transactions. **View all** opens Billing History.

FIGURE 21.5 The Billing page for an account that pays per election; your screen shows each band's price where the figure says Your price, and your balance where it says Your balance.

Payment methods

Payment Methods lists the cards saved to your account. Each shows the card brand and its last four digits, the expiry date, and a **Default** badge on your default card. Press **Add Payment Method** to save a card on a secure page from our payment processor. The trash button beside a card removes it. An election fee is taken from your balance, or paid with the card you enter on the checkout page.

Billing History and receipts

Transaction History, at the bottom of the Billing page, lists your latest balance transactions. Press **View all** to open the **Billing History** page at `vote.direct/dashboard/billing/history`.

Filter by **Type** (**Purchases**, **Usage**, **Refunds**, **Adjustments**) and by **From** and **To** dates. Each row shows **Date**, **Type**, **Description**, **Amount** and **Balance**, with money added in green. The page shows 25 rows at a time; **Export CSV** downloads the rows on the page you are viewing as a spreadsheet file.

> GOOD TO KNOW
>
> Billing History lists money moving in and out of your prepaid balance, and nothing else. An election fee paid by card on the checkout page never passes through your balance, so it does not appear there. For a card payment, your card statement is the record.

The descriptions are short labels:

- **Adding balance** is a purchase, described with the amount added and the words "verification balance".
- **A charge from your balance** is listed as usage under a short technical label. An election fee paid from your balance, for example, appears under the election's verification method, such as "email verification", not as an election fee.
- **A refund to your balance** is listed as a purchase with the description "Refund: cancelled election" followed by the election's title.

For a subscription, press **Manage** on your plan card to open our payment processor's page for your subscription.

Subscriptions

vote.direct no longer sells subscription plans. Each election is priced on its own, and announcements come with a Governance Center plan (see Governance Center). If you already have a plan (**Starter**, **Community**, **Association** or **Enterprise**), it keeps working as described here until you cancel it.

While your plan is current, every invite-list election is included. The header badge reads **Included in plan**, Review says **Included in your plan**, email and text verification are included, publishing charges nothing for the election, and adding voters costs nothing. If the plan ends, or a renewal payment fails, elections are priced per election again.

Extras keep their own charges on every plan: printed ballot packet mailings, your own domain for an election, and government ID checks beyond any yearly allowance.

Monthly or annual

Annual billing costs less than twelve monthly payments. It also adds announcements sent from your own domain and, on Community, Association and Enterprise, a yearly allowance of government ID checks. See Announcements.

Switching to annual

A monthly plan's card on the Billing page offers **Switch to annual**. The year is charged that day, and the unused part of the month is credited toward it. Confirm with **Switch to annual**, or press **Not now**.

Cancelling a plan

Press **Cancel** on your plan card, then **Cancel subscription** in the window that opens, or **Keep subscription** to back out. You keep full access until the end of the period you paid for. The card then shows a **Canceling** badge and **Access until** with the end date.

Only the workspace owner can switch or cancel a plan.

Where your plan shows

On a wide screen, a small badge reading **Plan** and your plan's name sits in the header beside **Create** and links to the Billing page. On a smaller screen, the first row of the menu shows **Current plan**, your plan's name and **Billing**. The Settings page shows your plan's name beside its heading. Without a subscription, none of these appear.

Extras, live meetings and surveys

Extra	How it is charged
Text messages	Included in every paid election and with a subscription. Free elections send email only.
Printed ballot packets	Per packet mailed, from your prepaid balance when you send the mailing. Every mailing waits for our approval before it prints. If we decline it, or it cannot be sent, the charge returns to your balance. See Paper, mail and in-person ballots.
Your own domain for one election	A one-time fee for that election, taken from your prepaid balance when you publish. There is no card option for it. Publishing waits until the address is verified, or until you remove it.
Government ID checks	Not offered in the wizard. Arranged with our team, and priced per checked voter. See Getting help.
Managed elections	If you want us to build or run the election, see Managed elections. Starting prices are on the pricing page; `vote.direct/quote` gives a preliminary quote.

Text messages on a free election

If anyone on a free election's list is set to get the ballot by text, publishing is refused under the title **Texts need a paid election**, with the explanation "Text messaging is included with paid elections. Free-tier elections send email only; texts cost carrier fees on every send." You can hand those voters their voting links yourself, switch them to email, or pay the price of a 26 to 50 voter election for this one and have them texted. Texts are included without that once the list is past 25 voters. See Voters and your roster.

Live meetings

A live meeting is priced like an election of the same size: by the number of attendees you expect, or the people on its list if that is larger, with every motion included. Meetings of 25 attendees or fewer are free. For the Annual meeting of the members, with 120 expected attendees, the console shows the price "for up to 200 attendees, every motion included."

You pay when you press **Open the floor**: nothing if the meeting is free or your plan covers it, otherwise from your prepaid balance if it covers the whole fee, or on the secure checkout page. After checkout, a message reads **Payment received. The floor is open.** Once paid, check-in is held to the band you paid for. Meetings over 5,000 attendees are quoted individually. See Live meetings.

Surveys

Surveys are free. See Surveys and quick polls.

CHAPTER 22

Settings reference

A page-by-page reference to Settings, in the order of its menu: what each page does, who can change it, and the exact labels you will see.

IN THIS CHAPTER

- Finding your way around Settings
- Profile
- Close your account
- Security
- AI agents
- Organization
- Team
- Ballots
- Notifications
- Sending Domain
- Billing

Finding your way around Settings

Settings holds your personal details and the settings of the workspace you are in. Open it with the gear in the header, or with **Settings** in the menu panel on a smaller screen. `vote.direct/settings` opens the Profile page.

The page is headed **Settings**, followed by your plan's name if you have one. The line under it reads "Manage your account and organization." and names the active workspace after "Current:". Workspace settings always apply to the workspace named there. To change another workspace, switch to it first (see Workspaces).

On a computer, a list on the left groups the pages under **Account**, **Workspace** and **Plan**, each with a one-line description. The page you are on has a black outline. On a narrower screen, the pages become a row of buttons across the top that you can scroll sideways.

Page	What it is for	Applies to	Who can change it
Profile	Your name and personal details; closing your account	You	You
Security	How you sign in; changing your password	You	You
AI agents	Connecting your own AI assistant	You	You
Organization	The workspace's name, its sender name and its state	The active workspace	Owners and admins
Team	Members, roles and invitations	The active workspace	Owners and admins
Ballots	Whether voters see turnout	Every election you create	You
Notifications	Which alerts appear in your bell, and an email digest if you want one	You, in the active workspace	You

Page	What it is for	Applies to	Who can change it
Sending Domain	Sending your workspace's email from your own domain	The active workspace	Owners and admins
Billing	Your plan and payments	Your account	The owner

Every member sees every page in the list. Pages that need an owner or admin show the settings read-only, or a notice, to everyone else. Ballots sits under Workspace in the list, but its one setting belongs to you, not to the workspace.

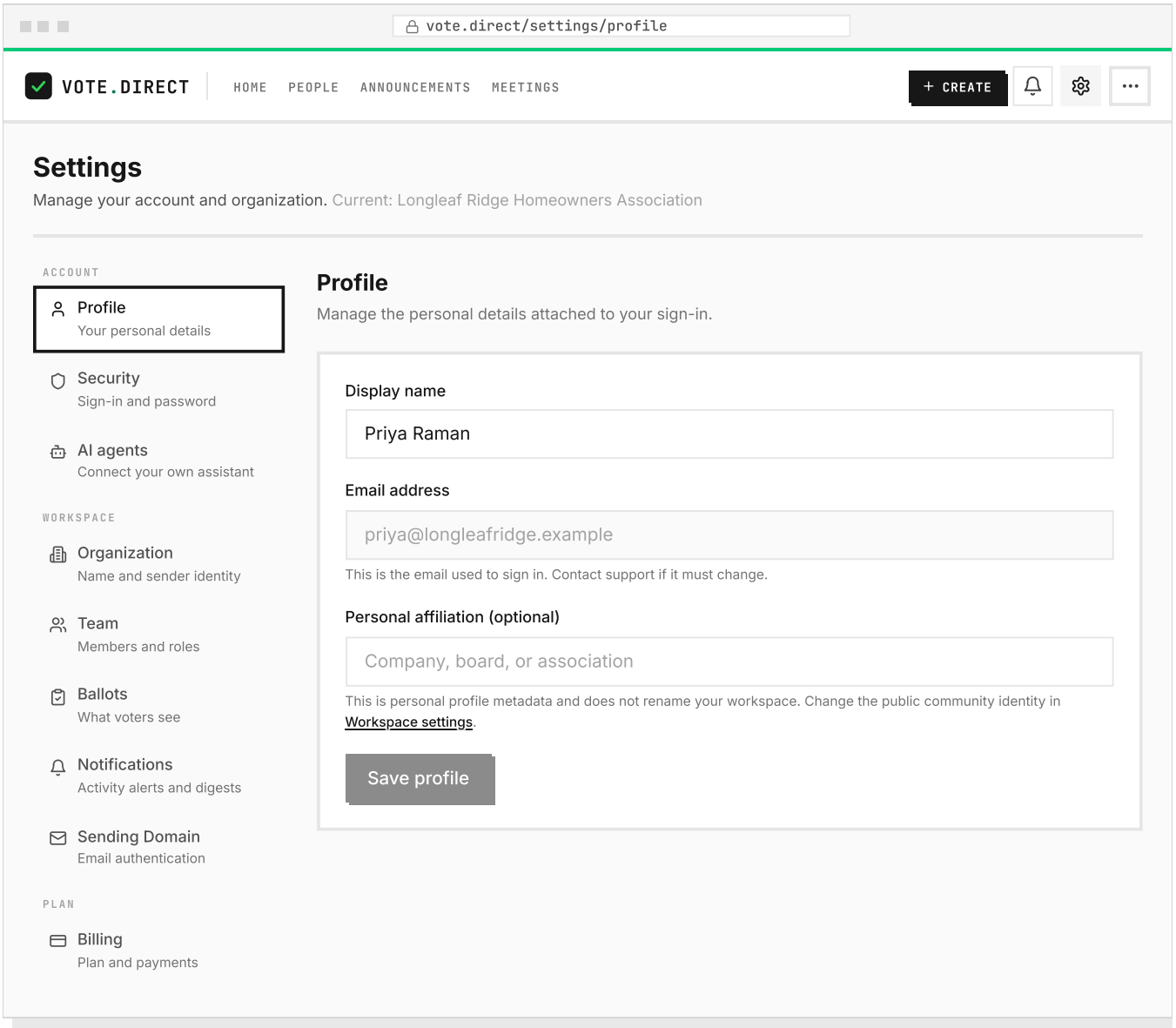


FIGURE 22.1 Settings on a laptop, open at Profile. The menu on the left is the same on every Settings page; Save profile stays gray until you change something.

Profile

The page reads **Profile**, "Manage the personal details attached to your sign-in." Anyone can change their own profile.

Display name	Your name, up to 100 characters. Your teammates see it on the Team page.
Email address	The address you sign in with. It cannot be changed here: "This is the email used to sign in. Contact support if it must change."
Personal affiliation (optional)	Up to 160 characters, for example the board or company you belong to. It is personal and does not rename your workspace; the workspace's name is on the Organization page. The link **Workspace settings** under the field opens that page.

Press **Save profile** after you change something, or **Discard changes** to put back what was saved. A message confirms "Profile saved".

Close your account

The **Close account** card, outlined in red at the bottom of the Profile page, closes your whole account. If you only want to remove one election, you do not need it: open the election and choose **Delete** in its **This election** box. Surveys have no delete button yet; write to support@vote.direct about removing one.

1. Press **Close account**. A red box opens.
2. Where it says "Type CLOSE to close your account", type `CLOSE` in capital letters.
3. Press the red **Close account** button. It works only when the box holds exactly CLOSE. **Keep my account** closes the box instead.

You are signed out and taken to the sign-in page. The card lists what closing means:

- "You are signed out and can no longer sign in."
- "Your elections and surveys disappear from view and their links stop working."
- "Any subscription ends at the end of its paid period."
- "Election records (ballots, results, certificates, audit logs) are kept under our records policy."

Elections your teammates created stay where they are. Signing in to a closed account shows "This account was closed, so you can no longer sign in to it." To ask about reopening it, email support@vote.direct. To have your personal data erased instead, the card points you to privacy@vote.direct.

> BEFORE YOU CLOSE YOUR ACCOUNT
>
> Closing hides every election you created, in every workspace, including elections in a team's workspace and elections that are still open. If your board still needs an election you created, finish it and download its records first.

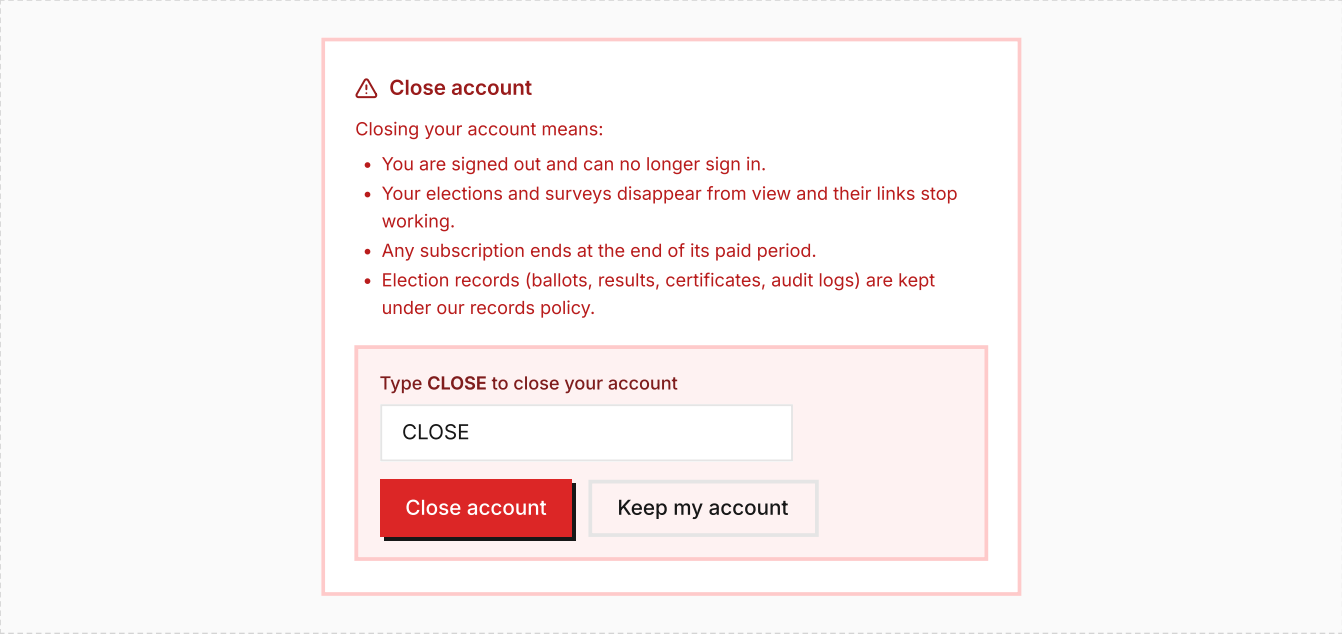


FIGURE 22.2 The Close account card after pressing Close account once. The card's paragraphs about deleting a single election and about reopening are left out of this drawing.

Security

The page reads **Security**, "Manage how you sign in and protect your account." It applies to your own account.

Sign-in status

The first card, labeled **Sign-in status**, shows how your account is protected, your address with most of it hidden (for example "pr***@longleafridge.example"), and a badge:

Status line	Badge	Meaning
Protected by your Google account	Google	You sign in with Google.
Verified email and password	Verified	You sign in with a password and your address is confirmed.
Email verification needed	Unverified	Your address was never confirmed. See When sign-in does not work.

Authentication

The **Authentication** card, "How you access this account.", names your sign-in method, **Google account** or **Email and password**, with an **Active** badge.

- If you sign in with Google, the card says "Password, recovery methods, and two-step verification are managed by Google." **Google security** opens your Google account's security page in a new tab.
- If you sign in with a password, **Change password** opens three fields: **Current password**, **New password** (at least 12 characters, with the same checks as when you signed up) and **Confirm new password**. Press **Change password** to save, or **Cancel**. A message confirms "Password changed", "Use your new password the next time you sign in."

A wrong current password gets "Current password is incorrect". After five tries in 15 minutes, the page says "Too many attempts. Try again later."

Password accounts also see a card, "Locked out or forgot your password?", which says the reset starts from the sign-in page. Because you are signed in, its **Go to sign in** button returns you to your dashboard. To use **Forgot password?** on the sign-in page, press **Sign Out** first (see Reset a forgotten password).

> GOOD TO KNOW
> vote.direct has no two-step verification setting of its own, and you cannot change your sign-in address on this page.

AI agents

The page reads **AI agents**, "Let your own assistant, such as Claude, ChatGPT or Meta's Muse, set up elections and surveys in this account for you." It applies to your own account. A card titled **What an assistant can do here** lists:

- "Draft elections from a conversation: the ballot, dates, rules and your voter list."
- "Tell you what an election still needs and exactly what it will cost."
- "Create surveys and check turnout on your elections."

It adds: "A draft charges nothing and contacts no one. You review and publish it from the link your assistant gives you, unless you allow it to publish. Sending invitations always stays with you." There are two ways to connect an assistant.

Connect by signing in

For Claude, ChatGPT, Cursor and other assistants that add MCP servers (a standard way for an assistant to connect to a service). The card shows the address `https://vote.direct/api/mcp` with **Copy address**, and says: "In Claude, open Customize, then Connectors, choose Add custom connector and paste the address." The first time the assistant needs your account, it sends you to vote.direct to approve it (see Connect an AI assistant).

Each connected assistant is listed with its name, a badge, **Can publish elections** or **Cannot publish elections**, the date it connected and the date it was last used ("Never" if not yet). **Disconnect** asks "Disconnect *name*? It stops working in your account immediately." With none connected, the card says "No assistant is connected this way yet."

Create a key

For assistants that take a pasted bearer token (a secret key) instead of a sign-in, such as Meta's Muse, Manus and Poke.

1. In **Name**, type the assistant's name, up to 60 characters, so you know which key to revoke later.
2. Leave **Let this assistant publish** unticked unless you want it to publish. "Publishing charges the election fee from your prepaid balance or plan. Leave this off to review and publish every election yourself."

3. Press **Create key**.
4. A card titled with the key's name, "Copy *name* now", shows the key once: "This is the only time the key is shown. Store it in your assistant, not in a note." Press **Copy key** and paste it into your assistant, with the address shown under **Connect your assistant**.
5. Press **I have stored it**.

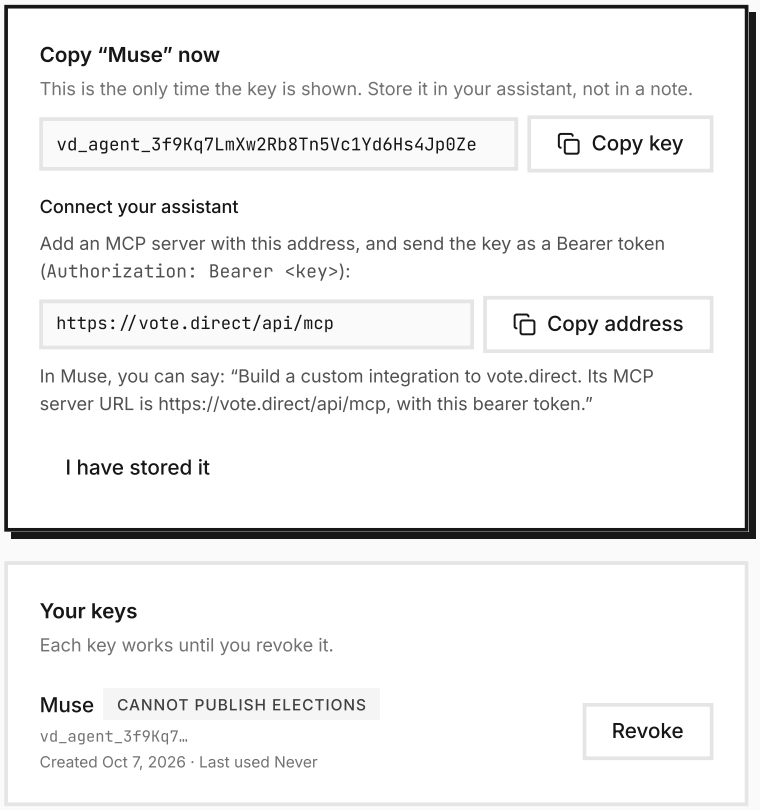


FIGURE 22.3 A key just made for an assistant, shown once, and the same key in the list below it. Your key will be a different string of letters and numbers.

Your keys

The **Your keys** card, "Each key works until you revoke it.", lists your active keys. Each row shows the key's name, the same publish badge as a connection, the first part of the key followed by "...", and when it was created and last used. **Revoke** asks "Revoke *name*? The assistant using it stops working here immediately." Revoked keys leave the list; a line under it counts them, for example "1 revoked key no longer works." With no active keys, the card says "No active keys. Create one above to connect an assistant."

Rules for assistants

- An assistant, whether connected by signing in or with a key, works only with elections you created yourself.
- It can publish only if you ticked **Let this assistant publish** for a key, or **Also let it publish elections** when you approved a connection. Publishing charges the election fee from your prepaid balance or plan.

- You can have up to 10 active keys. An eleventh gets "You already have 10 active keys. Revoke one you no longer use, then make a new one."
- You can make up to 10 keys in an hour. After that: "You have made several keys in the last hour. Please wait a little, then try again."
- A key is filed under the workspace that is active when you make it.

Organization

The page reads **Organization**, "Set the organization identity used on dashboards, ballots, and account emails." It applies to the active workspace. Owners and admins can change it. Everyone else sees the settings locked, with the note "You can view these settings. An owner or admin must make changes." and no Save button.

Organization identity

Organization name	The workspace's name, 2 to 100 characters. It shows across the dashboard and in the workspace switcher, and new elections in the workspace start with it as their sender name. Use your association's real name.
Email sender name	Up to 200 characters. "The recognizable name members or voters see on verification messages." Leave it blank to use the organization name, which the field shows in gray.

Press **Save Organization**, at the bottom right, after you change something. A message confirms "Organization updated", followed by "*name* is now used across this workspace."

When you rename the workspace, existing elections that still use the old name, the generated name or no sender name take the new name. An election you gave a sender name of its own keeps it.

Two kinds of name are refused, in a message titled "Could not update this organization":

- A name containing an email address: "Use your organization's name here, not an email address. Voters see this as who the ballot came from, and mail providers treat a sender name containing an address as spoofing, it lands in spam."
- The generated name: "This is the default name we generate, and we do not send under it. Use your organization's real name so voters recognise who the ballot came from."

These checks run only on a field you changed, so a workspace that still has its generated name can save its other settings. Below the identity card, a second card, "Need mail from your own domain?", links to Sending Domain.

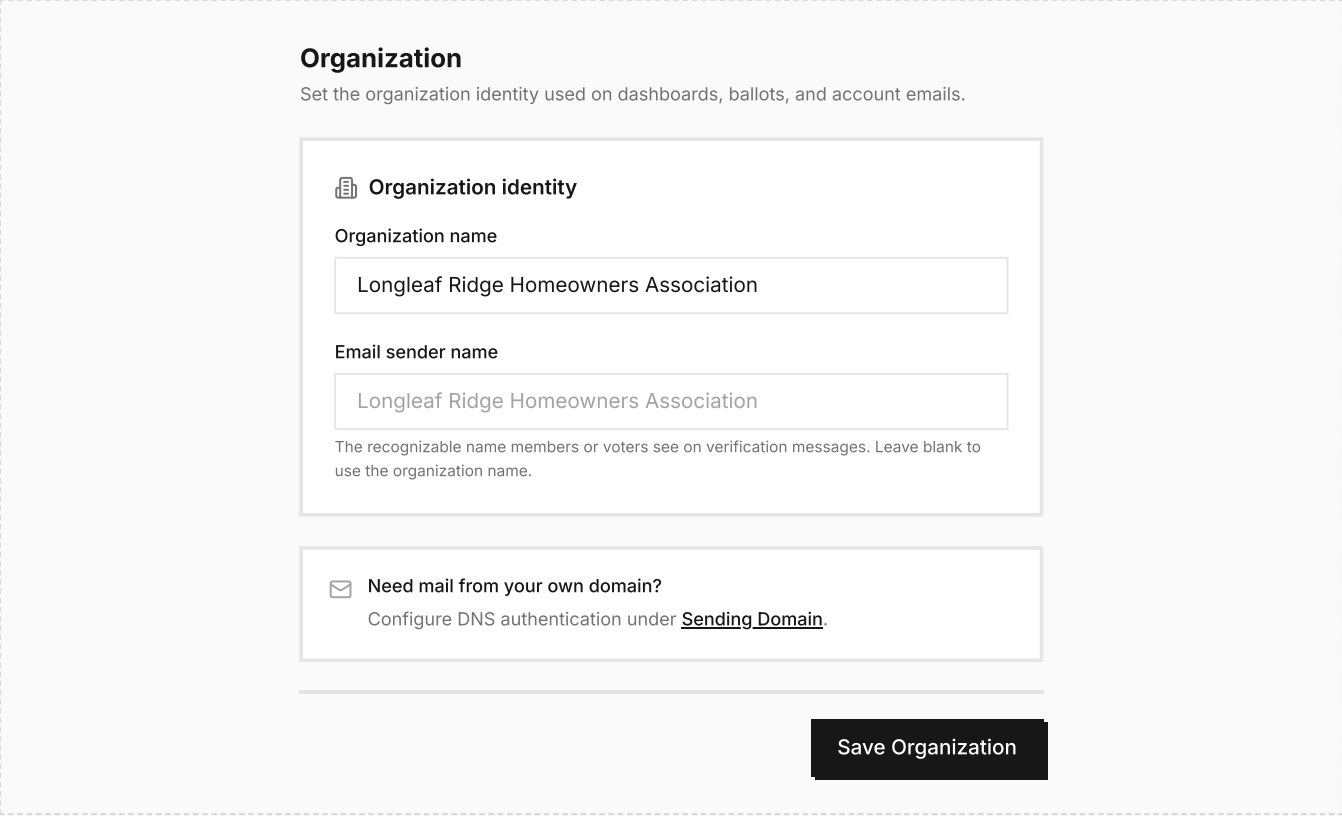


FIGURE 22.4 The Organization page after renaming the workspace from its generated name. The sender name is blank, so it uses the organization name shown in gray. The help line under Organization name is left out.

State rules

Further down the Organization page, the **State rules** card says: "Tell us which state you are in. We use it to show the notice period your state sets for each meeting you schedule. Your bylaws still win where they ask for more notice."

- **State** lists the 50 states and the District of Columbia, starting at "Not set".
- **Organization type** appears only until a type is saved: Homeowners association, Condominium association, Nonprofit board, Club or lodge, or Congregation. The card explains: "A homeowners association and a condominium follow different chapters in most states, so the answer changes the dates we show you. It also sets the words this workspace uses."

Press **Save state**, which works once both are chosen. A message confirms "State saved", "New meetings will show the notice period your state sets." The card then shows what is on file, for example "On file: North Carolina, homeowners association." Once a type is saved, the card stops asking for it and offers no way to change it, so choose carefully. Owners and admins can save this card; everyone else sees it locked.

The meeting notice periods it feeds appear in the meeting calendar that comes with a Governance Center plan (see Governance Center). Your elections do not read this card: each election has its own state setting in the election wizard (see Build the election and Inspectors and state rules).

This is our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on it.

Team

The Team page lists the active workspace's members and pending invitations. Owners and admins invite people, change roles and remove members there; everyone else sees the list with each person's role. Every step, and what each role can really do, is in Team and roles.

Ballots

The page reads **Ballots**, "What voters see on your ballots." It has one switch, **Show turnout to voters**, which is on at first. The card explains:

"Voters see how many ballots are in: a count of votes cast on the ballot page, and “40 of 550 eligible voters have participated” on the thank-you screen and the voter’s certificate. Turn this off to keep turnout between you and your board. It applies to every election you create. Voters still get their confirmation code, receipt and certificate, and each election’s own results setting still decides whether voters see results."

Press **Save ballot settings**, or **Discard changes**. A message confirms "Ballot settings saved", followed by "Voters will see turnout on the ballot page and after they vote." or "Voters will no longer see turnout, on the ballot page or after they vote."

- The switch belongs to you, not to the workspace. It covers every election you created, in every workspace.
- vote.direct reads it each time a voter opens the election page, votes or downloads a certificate, so a change also reaches your elections that are already open.
- Elections a teammate created follow the teammate's own switch.

Notifications

This page chooses which alerts appear in your notification bell for the active workspace (see Notifications), and whether you also get an email digest. Each person sets their own, and each workspace separately. The card **Activity alerts** says "These alerts appear in the notification bell for this workspace." and has three switches, all on at first:

Switch	Description on screen	The notification it controls
New vote created	When a teammate creates a vote in this workspace.	"New vote: *title*"
Vote closing soon	A 24-hour warning before an open vote closes, and an email when one of your drafts nears or misses its close date.	"*title*" closes in 24 hours. Also the email about a draft of yours in this workspace whose close date is less than two days away or has passed.
Results available	When final results are ready for a closed vote.	"Results ready: *title*"

Press **Save preferences** at the bottom of the page; it reads **Saved** once done. **Discard changes** puts back what was saved. A message confirms "Notification preferences saved", "These choices apply to *workspace*." Saving changes only the choices on this page. Of the two emails about an unfinished draft, the one about its close

date follows **Vote closing soon** for drafts in this workspace, and the email that lists what is left to finish a draft has its own Unsubscribe link at the bottom.

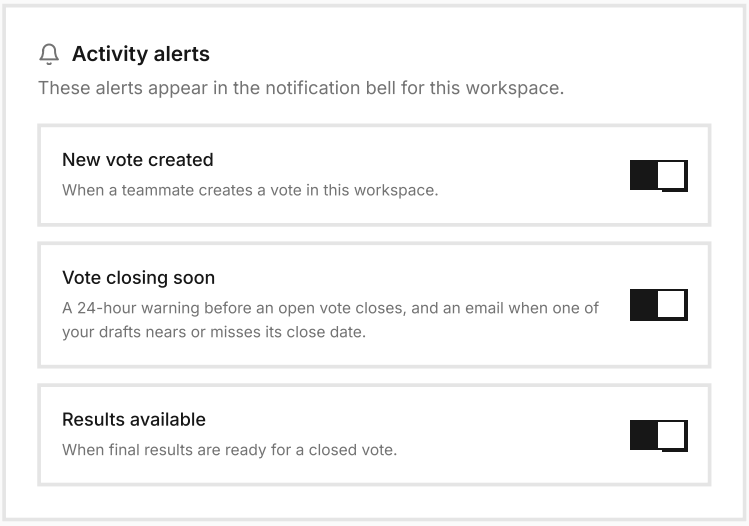


FIGURE 22.5 The three activity alerts, all on, as every member starts. They decide what reaches your bell in this workspace, and which sections an email digest has.

Email digest

The **Email digest** card offers one email that sums up this workspace's elections: **Off**, the choice every member starts with, **Daily** or **Weekly**. The daily digest is sent every day at 9:00 AM UTC, and the weekly digest on Mondays at 9:00 AM UTC. That is before the workday begins in every U.S. state: 5:00 AM Eastern in summer and 4:00 AM in winter. Choose one and press **Save preferences**.

Each switch in **Activity alerts** that is on gives the digest a section:

Section	What it lists	Switch
New votes open	Elections in this workspace whose voting opened in the past day, or the past week for the weekly digest	New vote created
Closing soon	Open elections whose voting closes in the next 2 days, or the next 8 days for the weekly digest	Vote closing soon
Results available	Elections in this workspace that closed in the past day, or the past week for the weekly digest	Results available

Each election in the digest links to its page in your dashboard, and each closing time is shown in the election's own time zone. A section with nothing to report is left out, and when nothing happened, no email is sent. Under the three choices, the **Digest preview** shows the subject the email is sent with, such as "Weekly Digest: *workspace*", and the sections your switches leave on. The email ends with a link back to this page, where you can change the digest or set it to **Off**. In Governance Center, the digest can also list your alerts from the **Notices**, **Meetings**, **Records**, **Team & roles** and **People roster** switches that are on.

Sending Domain

A sending domain lets vote.direct send your workspace's email from an address at your own domain, such as noreply@longleafridge.example, instead of a shared vote.direct address. The page explains: "These records establish DKIM and the mail return path for verification, invitation, reminder, and workspace messages. Your website and existing inboxes are not changed." Announcements are sent only from a verified sending domain (see Announcements).

Owners and admins set it up. Everyone else sees "Owner or admin access required", "Ask a workspace owner or admin to configure email authentication." Until a domain is verified, messages go from the shared vote.direct address, with your workspace's name as the sender name.

What you need

- A domain your association owns, such as the one its website uses. A mailbox provider's domain, such as gmail.com or yahoo.com, cannot be used.
- Access to that domain's DNS settings, usually at the company where the domain was registered or where the website is hosted.

Set it up

1. Open **Settings**, **Sending Domain**. In the card **Use your own domain**, type your **Domain** on its own, for example `longleafridge.example`, not an address like board@longleafridge.example.
2. Leave **Mail subdomain** as "em" ("Usually “em”.") unless you need another.
3. Optionally type a **From address**. It must be at the same domain. Left blank, it becomes noreply at your domain.
4. Press **Create DNS records**. A message confirms "DNS records created", "Add the records below, then verify the domain."
5. The card now reads **DNS records required**, marked **Pending**. Its table lists each record's **Record**, **Type**, **Host** and **Points to**, with a copy button beside each value. A new domain needs two records: **DKIM** (a TXT record) and **Return path** (a CNAME record).
6. Add both records at your DNS provider exactly as shown.
7. Press **Verify DNS records**. If a record is not visible yet, a **Status** column shows **Valid** or the reason for each record, such as "Return path CNAME not found yet", and the button becomes **Retry verification**. "DNS changes can take up to 48 hours to propagate. A failed check does not remove your configuration."
8. When both records check out, the card reads **Domain verified**, marked **Ready**, with "Messages can be sent from" your address. A message confirms "Sending domain verified".

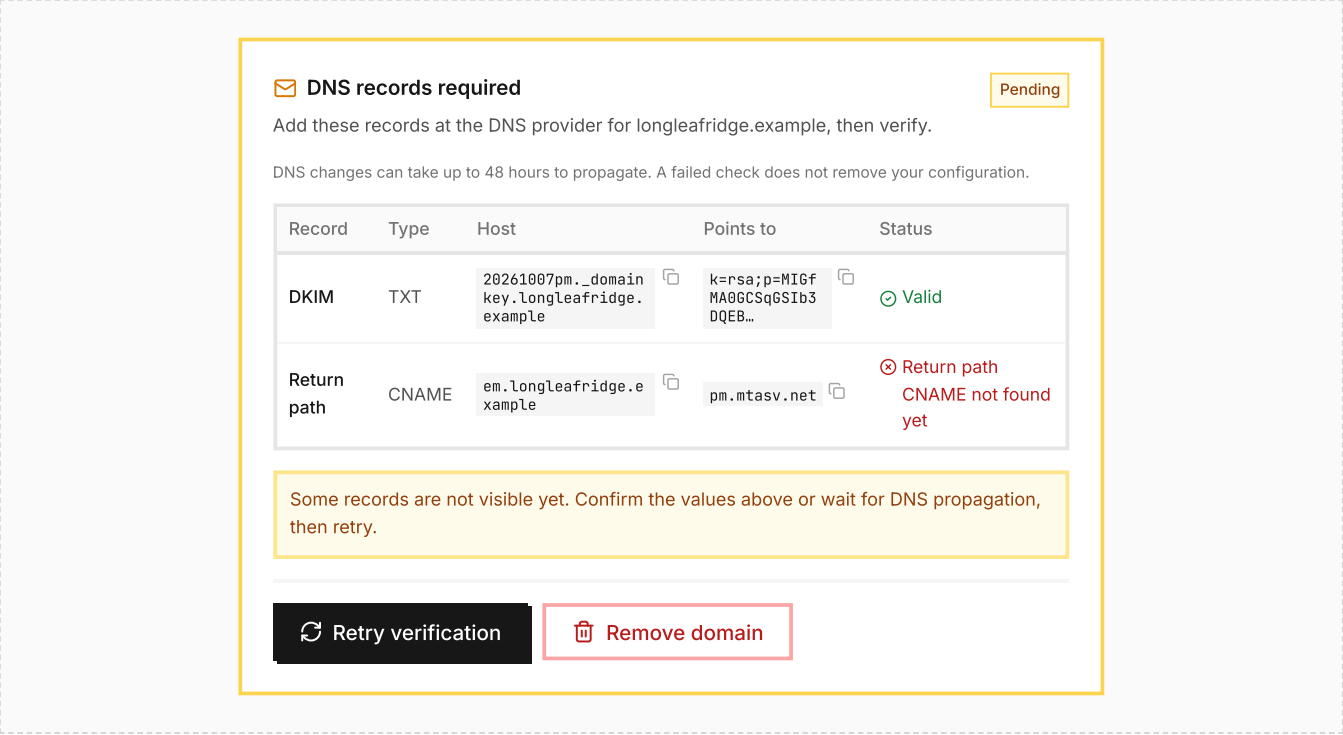


FIGURE 22.6 The sending domain after a first check: the DKIM record is found and the return path is not visible yet. Your record values will differ; copy them from your own page.

When a domain is refused

The page checks the domain and From address as you type and explains the problem under the field:

- An address typed into Domain: "Enter the domain on its own, without the mailbox in front of it."
- Something that is not a domain: "That is not a domain name."
- A mailbox provider such as gmail.com: the page explains it is a mailbox provider, not a domain you own, so mail cannot be sent from it. Use a domain your association owns, or keep sending under vote.direct's address.
- A From address at a different domain: the page explains the From address has to be at the domain being authenticated.

Remove or replace a domain

A workspace has one sending domain at a time. To use another, remove the current one first: press **Remove domain** and confirm "Remove this sending domain?", "Messages will immediately fall back to the shared platform address. You can set the domain up again later." A message confirms "Sending domain removed". Then set up the new domain.

Billing

Billing, under **Plan** in the menu, opens `vote.direct/dashboard/billing`, which sits outside Settings, so the Settings menu goes away. Only the owner of the active workspace can use it. Anyone else sees a page that says the workspace manages billing, with a **Back to your elections** link. Plans, payments and receipts are covered in Billing and payments; prices are on vote.direct/pricing.

CHAPTER 23

Troubleshooting

The messages and problems organizers and voters meet most often, what each one means, and what to do about it. Messages are quoted as they appear on screen.

IN THIS CHAPTER

- Signing in
- Building and publishing
- Sending ballots
- When a voter is stuck
- While voting is open
- Results
- Paper ballots
- Team, billing and announcements

If you do not find your problem here, press **Report a problem** at the bottom left of any signed-in page, or call or text (512) 222-8191. See Getting help.

Signing in

> **"That email and password don't match."**

What it means. The address or the password is wrong. vote.direct and Governance Center share one sign-in, so the password is the same on both.

What to do. If you created your account with Google, use **Continue with Google**. Otherwise press **Forgot password?** and choose a new password from the emailed link. New here? Use **Create one** under the form.

> **"Your email address has not been confirmed yet, so your password does not work until it is."**

What it means. Your account was created but the confirmation code was never entered.

What to do. Press **Send me a new code**, then type the code from the newest email. The code expires in an hour.

> **"This address signed up with Google. Use the Google button."**

What to do. Press **Continue with Google** and choose the same Google account.

The confirmation code never arrived

What to do. Check your spam or junk folder. On the code screen, use **resend it**; if a code went out less than a minute ago, wait a minute first. If the screen says you may already have an account, sign in with the same email and password, or reset your password.

“Too many sign-in attempts. Try again later.”

What it means. There were too many tries in a short time. The limit resets after 15 minutes.

Building and publishing

The publish button reads Finish setup: Voters

What it means. Something required is missing. The publish checklist beside the wizard lists what is done and marks the next item with **NEXT**. An election needs at least one voter before it can be published.

What to do. Press the button: it takes you to the step with the first gap and lists what is needed.

“Almost there: this vote is a draft”

What it means. You pressed publish, the election was saved, and something stopped it from going live. The message underneath gives the reason. The common ones:

- **Nobody on the voter list.** Add your voters on the election's **Voters** tab, then publish.
- **A compliance problem.** The message starts “Fix before publishing”. The **Compliance** card on the election's **Settings** tab shows each item.
- **An inspector of elections is required.** Appoint one from the **Inspector of elections** card on the **Settings** tab, then publish.
- **The dates.** A close time in the past, or a close before the start. Change them on the **Settings** tab.
- **Paper ballots are not set up.** Choose who handles them and who counts them on the **Paper ballots** page.
- **Text voters on a free election.** See the next entry.

“Texts need a paid election”

What it means. Elections with 25 voters or fewer are free and send email only. Someone on the list is set to receive a text.

What to do. Give those voters an email address, hand them their voting links yourself, or pay the price of a 26 to 50 voter election for this one and they are texted. Texts are included without that once the election has more than 25 voters.

“Cannot modify ballot structure on a live vote. Only timing and reminder changes are allowed.”

What it means. Voting has opened, so the questions and rules are locked. Ballots already cast are never judged by different rules.

What to do. You can still change the close time and the reminders. For anything else, use **Duplicate** on the **Settings** tab to start a new draft from this one.

> **"Cannot change verification levels or eligibility on a paid election. Cancel the election to refund and create a new one."**

What it means. The price was set by these choices, so they are fixed once paid for.

A question still says "Candidate 1"

What to do. Templates fill in placeholder names. Replace them with your real candidates or choices, or delete the rows you do not need.

> **"Payment received, but the election has not published yet"**

What it means. Your card payment went through, but something stopped the election from going live. The page shows what it is and a button to fix it.

What to do. Follow the advice on the page, then publish. You are not charged again for the same election.

> **"Checkout cancelled"**

What it means. You left the payment page before paying. Your draft is saved and nothing was charged. Publish again when you are ready.

> **"Rate limit exceeded. Try again later."**

What it means. You created or saved a lot of elections in the last hour. Wait, then try again.

Sending ballots

I published, but nobody has received a ballot

What it means. Publishing does not email anyone.

What to do. Press **Email your voters their ballots** on the screen after publishing, or **Send to unsent** on the election's **Voters** tab. See Invitations and reminders.

Voters I added after publishing did not get a ballot

What it means. Adding someone to the list does not email them. They show as **Not sent**.

What to do. Answer **Send now** when asked after adding them, or press **Send to unsent** later.

> **"Distribute ballots yourself is off for this election, so no voting codes were made."**

What it means. Printable notices, the links spreadsheet and the credentials sheet need **Distribute ballots yourself** on. It is off on an election set to Email invites until you turn it on, and on any election where you turned it off. Nothing was created.

What to do. On the election's **Voters** tab, find **Distribute ballots yourself** (it may be inside **More ways to deliver ballots and help voters**), press **Turn on**, then download again.

"Already sent" or **"Nothing was sent"**

What it means. A voter is not emailed the same ballot twice within 15 minutes from their row, or within 12 hours from a list send, and anyone who has voted is skipped.

What to do. Ask the voter to check their spam folder before sending again.

A voter's status reads Ballot bounced, Ballot blocked or Marked as spam

What it means. Their mail server rejected or refused the ballot, or they reported it as spam. Hover over the status to see the reason the mail service gave.

What to do. Correct the address and send again, ask them to allow mail from us, or switch them to a text message or a paper ballot. After a spam report, we do not email them again for this election.

Ballots arrive from "vote.direct" instead of our name

What it means. Your workspace has no organization name set, so we cannot send under it.

What to do. Set the name in Settings, **Organization**, or in the **Who is this ballot from?** box that appears before a send. Voters open email from a name they know.

Some voters were not texted: **"voters have replied STOP"**

What it means. Those numbers opted out of texts from us. They are not marked on your list; the send result tells you how many.

What to do. Reach them by email or paper.

When a voter is stuck

"You are not on the eligible voters list for this election."

What it means. The email address the voter typed is not on your list. Usually they have more than one address.

What to do. Ask which address they used, and either ask them to use the one on your list or correct their row. Their personal invitation link fills in the right address for them.

"That mobile number is not on this election's voter list."

What to do. Check the number on their row, or let them verify by email instead if they have one on your list.

"Invalid code", **"Verification code has expired"** or **"Too many attempts"**

What it means. A voting code lasts 30 minutes and allows three tries.

What to do. The voter presses **REQUEST NEW CODE** and uses the code from the newest email or text.

"Too many codes sent to this address."

What it means. Five codes in 15 minutes is the limit. The voter waits a few minutes and tries again.

“This link has expired”, **“This link was already used”** or **“This link no longer works”**

What it means. The voter opened an old code email. Each new code replaces the one before.

What to do. They press **GET A NEW CODE** and use the newest email.

“For your security, confirm your email again on this device to open your ballot.”

What it means. The voter switched phone, computer or browser after confirming their email.

What to do. They confirm their email again on the device they are using. If the page also says the site needs cookies, they allow cookies for vote.direct in their browser.

“This property's ballot has already been cast by” **a co-owner**

What it means. The election gives each unit one vote, and another owner of the unit voted first. This is working as set up.

“You have already voted in this election. Your ballot was recorded.”

What it means. Their ballot is in. Their confirmation code is their proof; it was on screen after they voted and, unless the election uses sealed ballots, in their receipt email or text.

A voter wants to change their vote

What it means. A cast ballot is final unless **Allow vote changes** was turned on in the **Ballot options** group of the election's **Settings** tab before voting opened. It is off unless you turn it on, and it is not available with sealed ballots.

With it on. A voter can reopen their ballot and change their answers before the close, from the same browser they voted on, or with their printed voting code. A new code by email or text is not sent once someone has voted. The changed ballot gets a new confirmation code.

“Code not recognized.” **on vote.direct/pin**

What to do. The voter checks the six digits on their notice. If the page also asks for an election code, it is the short code in the address printed on the notice, just after /pin.

“Online voting has closed”

What it means. The election has an online cutoff that has passed. Paper and in-person ballots can still be entered until the election closes.

A voter says they never got the email

What to do. Find them on the **Voters** tab. **Not sent** means it was never sent: press **Send**. **Invited · hasn't voted** means it was sent: ask them to search their inbox and spam folder for your organization's name, then use **Resend**. You can also press **Link** on their row to copy their personal ballot link and give it to them yourself.

While voting is open

A teammate cannot close the election, change its settings or download results

What it means. Closing, cancelling, deleting, exporting, the certificate, the audit log, and paper and mailed ballots need the owner or admin role, unless you created the election. Changing the ballot, settings or voters needs the editor role or higher. Buttons a role does not allow are not shown.

What to do. Ask an owner or admin to do it, or to give you a role that allows it in **Settings**, **Team**. See Team and roles.

"Quorum has not been reached" when closing early

What it means. Fewer have voted than your quorum requires. You can still close, and the results are then advisory only rather than binding.

What to do. Press **Close anyway** only if that is what you intend. Otherwise keep voting open and remind the voters who have not voted.

The close warning mentions paper ballots that have not been counted

What it means. A closed election cannot accept a paper count. Enter every paper ballot on the **Paper ballots** page before you close.

"Cannot cancel automatically"

What it means. Ballots have been cast, so the election cannot be cancelled from the screen.

What to do. Email support@vote.direct to ask for a cancellation and refund.

Results

Voters see "Results Not Available Yet"

What it means. One of three things: results are set to show after voting closes and it has not closed; results are set to private; or an inspector of elections has not yet certified them.

What to do. The banner at the top of your **Results** tab says exactly what voters see and why.

"Results are protected until 5 votes are cast"

What it means. With anonymous ballots, voters see a locked screen until the minimum number of ballots are in. You always see the tally.

The result shows a tie

What it means. vote.direct reports a tie rather than picking a winner. Your governing documents decide how a tie is settled: a runoff, a coin toss, or whatever they specify.

The audit log shows "Integrity Error"

What to do. Do not certify or announce results. Call or text (512) 222-8191 and email support@vote.direct with the election's name right away.

Paper ballots

"This member already voted"

What it means. The member has an online ballot or another paper ballot. The rule is that the first ballot received counts.

What to do. Keep the earlier ballot. The other is set aside or voided, with an entry in the audit log.

A question was recorded as blank

What it means. Only Single choice, Multiple choice and Yes / No questions can be entered from a paper ballot. Other types print, but are recorded as blank.

Paper ballots can no longer be counted

What it means. The election has closed. Paper ballots must be entered while the election is open; you get a warning 24 hours before the close if any are outstanding.

Team, billing and announcements

"manages billing for this workspace"

What it means. Only the workspace owner can open Billing. Ask the owner.

"Only workspace owners and admins can manage the roster"

What it means. Editing People needs the owner or admin role. Ask an owner to change your role, or to make the change.

Announcements are grayed out

What it means. On vote.direct, announcements need an owner or admin, a plan that includes announcements, and a verified sending domain. The banner at the top of the page names what is missing. See Announcements.

An error page says "Something went wrong"

What it means. The details have been sent to us automatically.

What to do. Press **Try Again**. If it happens again, write a line in the box on the error page about what you were doing and press **Send to support**.

CHAPTER 24

Getting help

How to reach us, what to have ready, and where your voters should go with their questions.

IN THIS CHAPTER

- Ways to reach us
- Report a problem
- When an error page appears
- When our team helps inside an election
- What to have ready
- Your voters' questions
- More to read

Ways to reach us

Phone or text	**(512) 222-8191**. Call or text.
Email	**support@vote.direct**
From inside the product	The **Report a problem** button at the bottom left of every page once you are signed in.
Privacy requests	**privacy@vote.direct**, for example to have your personal data erased.

Report a problem

Press **Report a problem** at the bottom left of any signed-in page. A box opens.

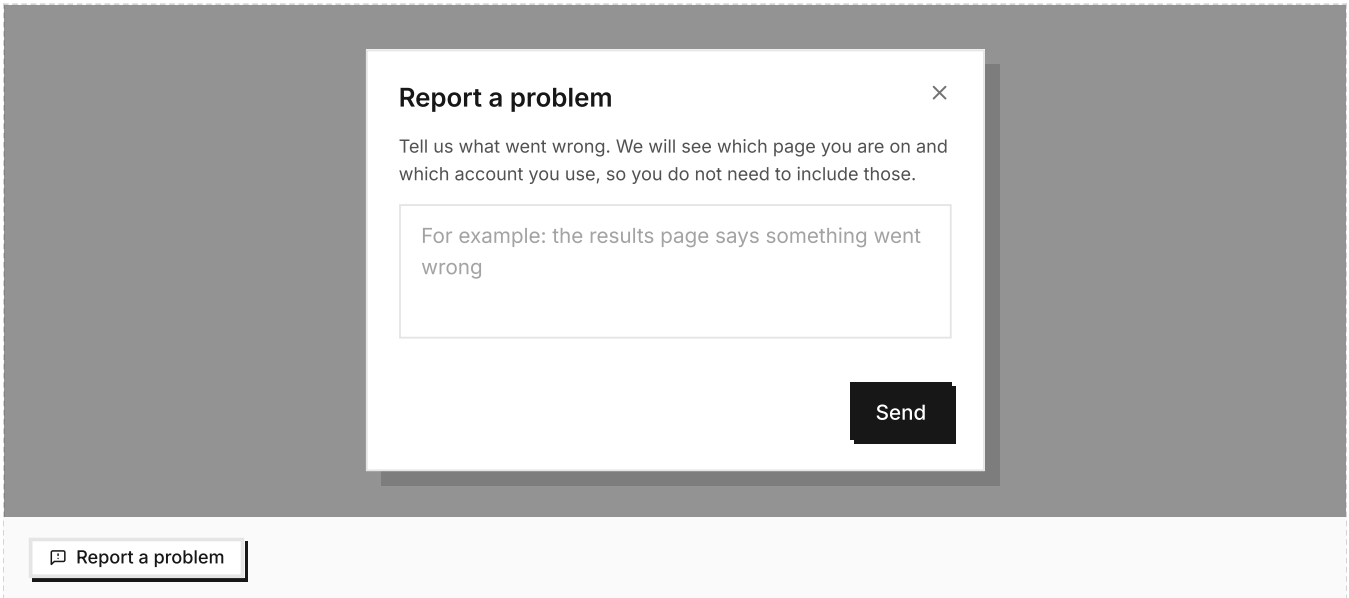


FIGURE 24.1 The Report a problem box, and the button that opens it at the bottom left of every signed-in page.

Write what you were trying to do and what happened, then press **Send**. You see **"Thank you. It is in our inbox and we will reply by email."** We reply to the email address on your account. If the message cannot be sent, the box tells you to email support@vote.direct or call (512) 222-8191 instead.

When an error page appears

If a page fails, you see **Something went wrong** with **Try Again** and **Home**, and an Error ID underneath. The details of the error have already been sent to us automatically. If you can, add a line in **What were you trying to do? (optional)** and press **Send to support**: it tells us what the automatic report cannot.

If you call us about an error, read us the Error ID. It points straight to the report.

When our team helps inside an election

Sometimes the quickest way to help is for our team to look at your election with you. When our support team has been given access to one of your elections, an amber banner at the top of that election's page says **"vote.direct support has access to this election"**, with a **Revoke access** button for each grant. Access is for a limited time, and you can end it yourself at any moment with that button.

What to have ready

A few details make any question faster to answer:

- The name of the election, or better, the address of its page from your browser's address bar.
- What you pressed, and the exact words of any message on screen. A photo of the screen is fine.
- For a voter's problem: which voter, by name, and what they saw. Ask the voter which email address or phone number they used.
- For a billing question: the date of the payment and how you paid.

> GOOD TO KNOW
>
> Never share a password or a verification code with anyone, including someone who says they are from vote.direct. A verification code is only ever typed into a vote.direct page by the person it was sent to. Tell your voters the same.

Your voters' questions

Voters are told to ask whoever sent them the ballot: the verification page says **"Questions? Contact whoever sent you this ballot."** That means you, or whoever your board names. Before you send the ballots:

- Decide who answers voters' questions, and include their name, email or phone in your own notice to members.
- Read What your voters see, which walks through every screen a voter meets, and When a voter is stuck, which covers the problems they raise most.
- Keep the election's **Voters** tab open while voting runs. It shows each voter's status, and the **Link** button on a row copies that voter's personal ballot link if you need to give it to them directly.

Questions about your community's own rules, such as who owns a home or whether a candidate is eligible, are for your board to answer. vote.direct does not rule on them.

More to read

Prices	vote.direct/pricing
How the record is protected	vote.direct/election-security explains ballot secrecy, the audit chain and what the record does and does not prove.
Security	vote.direct/security
State voting rules	vote.direct/hoa-voting-rules has summaries by state. They are our reading of the rules to support your review, not legal advice. Have your association's attorney confirm before your board relies on them.
Checking an audit package	vote.direct/verify
Having us run it	vote.direct/managed-elections and an instant quote at vote.direct/quote
This guide	vote.direct/user-guide, with the PDF to download

CHAPTER 25

Glossary

The words this guide and the product use, in plain terms, with where to read more.

Abstain	A choice you can add to Single choice, Multiple choice and Approval questions. It counts toward turnout but never wins. See Ballot questions and voting methods.
Advisory results	Results of an election closed before quorum was reached. The certificate says the results are advisory only. See Close, results and the record.
Anonymous ballot	A ballot secrecy setting: you see who has voted, never how, and voters' identities are kept out of results and exports.
Approval voting	Voters mark every candidate they approve of, with no limit. The candidates approved by the most voters win.
Audit log	The record of every action on an election, in order, with each entry linked to the one before it. **Verify Integrity** checks the chain. It is tamper-evident: an edited or deleted entry shows up when the chain is checked.
Audit package	A file holding an election's record that anyone can check at vote.direct/verify. An inspector of elections can download it from their page.
Ballot secrecy	How the link between a voter and their ballot is treated: Identified, Anonymous or Sealed. It locks when voting opens.
Borda count	A ranked counting method: each position in a ranking awards points, and the highest totals win.
Candidate election	A question set up with a photo and a short statement for each candidate.
Certificate	The results certificate: a PDF of the election's details, turnout, quorum, results, verification methods, an audit summary and the integrity check. On the **Results** tab.
Closed	The state of an election once voting has ended. No more ballots are accepted and the count is frozen.
Co-owners	Two or more owners of the same unit or property. With one vote per unit, the first of them to vote casts the unit's ballot.
Compliance check	The product's comparison of your election's settings with the rules it holds for your state, for the states it covers. It is our reading of the rules to support your review, not legal advice. See Inspectors and state rules.
Condorcet	A ranked counting method that elects the candidate who beats every other head-to-head, with a rule (Schulze, ranked pairs or minimax) for when nobody does.

Confirmation code	The code a voter is shown after voting, and usually sent in their receipt. It is their proof that a counted ballot exists. It never shows how they voted.
Contingent vote	A ranked counting method: if nobody has a majority, all but the top two are eliminated at once and ballots transfer.
Counting link	A link you give someone so they can find and enter paper ballots without an account. See Paper, mail and in-person ballots.
Cumulative voting	Each voter gets a pool of votes to spread across candidates however they like, all on one or split.
Draft	An election still being built. Nothing is sent and nothing is charged.
Full service	The paper tier where we print and mail the packets with a postage-paid return envelope to us, and enter the returned ballots.
Identified ballot	A ballot secrecy setting: you can see who voted and how each person voted.
Inspector of elections	A neutral person who confirms the roster and certifies the count on their own private page. Voters see results once the inspector certifies them.
Instant runoff	A ranked counting method (also called ranked choice voting): last place is eliminated round by round until one candidate holds a majority.
Ledger	The list of every paper ballot issued for an election, with its number and status: generated, mailed, received, counted, rejected, set aside, late or void.
Live	The state of an election while voting is open.
Managed election	An election we run for you, from building the ballot to the certificate. See Managed elections.
One vote per unit	A voting rule where co-owners of a unit, lot or household share one ballot.
Online cutoff	An optional earlier time when the web ballot stops, for example when a meeting is called to order, while paper and in-person ballots can still be entered until the close.
Organizer	The person running an election: whoever created it, and in a shared workspace its owners and admins, who can also close and export it. See Team and roles.
People	Your contact book. Everyone you add to an election is saved there.
Per-unit ballots	For an owner of several units: a separate ballot for each unit, so they can vote each one differently.
Privacy threshold	On anonymous elections, the number of ballots that must be in before voters can see any results: five unless you change it.
Printable notices	A PDF with one page per voter carrying a QR code and a personal voting code, for you to hand out or mail yourself.

Proxy	A person who votes on another member's behalf. Members name their proxy on their ballot page; see Voters and your roster.
Publish	The step that turns a draft into a scheduled or live election, and the moment you pay if the election has a price. It does not email anyone.
Quorum	How many must take part for a vote to count: none, a number of voters, or a percentage of eligible voters or of voting weight.
Receiving link	A link for whoever takes in returned ballot envelopes: they photograph each envelope and it is marked received.
Reminders	Automatic emails, and texts for text voters, to people who were sent the ballot and have not voted. On by default: 3 days and 1 day before the close.
Required share to pass	The share of the vote a Yes / No measure needs, such as two-thirds of votes cast. Separate from quorum.
Results visibility	What voters can see: Private (only you), After close, or Live.
Roster	An election's voter list: the record of who may vote.
Scheduled	The state of a published election waiting for its start time. It can still be edited and opens on its own.
Scored voting	Voters score each candidate on a scale. The highest totals win. With the STAR option, the two highest totals go to an automatic runoff.
Sealed ballot	A ballot secrecy setting: each ballot is stored with no link to the voter. No tally until voting closes, no vote changes, no paper ballots.
Seats	How many candidates win a question. On a Multiple choice question, the most choices a voter may mark.
Self-print	The paper tier where you print and mail the packets yourself, and your counter enters the returns.
Sender name	The name your voters see an invitation come from: your organization's name.
Sending domain	Your own email domain, set up with two DNS records, so mail comes from your organization's address.
Single transferable vote	A ranked counting method for several seats: votes transfer between preferences until every seat is filled.
Survey	A free, open questionnaire anyone with the link can answer. No verification. See Surveys and quick polls.
Test ballot	A private copy of your election sent only to you, exactly as voters receive it. Nothing you do on it counts.

Turnout	The share of the people on your voter list who have voted.
Verification	How a voter proves who they are before voting: a code by email or text, a printed voting code, or a Voter ID and password.
Voter ID and password	Credentials you hand out instead of email. The voter signs in at vote.direct/signin.
Voting code	A six-digit personal code from a printed notice. The voter types it at vote.direct/pin.
We mail them	The paper tier where we print and mail the packets and the returns come back to you for counting.
Weighted voting	Each ballot counts by a number on the voter's record, such as shares or an ownership percentage. A voter with no number counts as 1.
Workspace	Your organization in vote.direct: its elections, its team, its settings. You can belong to more than one and switch between them.
Write-in	A candidate a voter adds to the ballot themselves, if the question allows it.