



Candidate Access Portal User Guide



Candidate Access Portal

Table of Contents

| | |
|---------------------------------------|----|
| Information for Candidates | 2 |
| Accessing the Portal | 2 |
| Portal Features | 5 |
| Elector Search | 5 |
| Searching by Name | 5 |
| Searching by Street | 7 |
| Downloading an Extract | 8 |
| Downloading a Revision Report | 10 |
| Viewing Documents in the Portal | 11 |

Information for Candidates

The Candidate Access Portal permits candidates to:

1. Search for registered electors in their constituency and view selected voter details;
2. Request an extract or a revision list of registered electors in their constituency;
3. Retrieve documents uploaded to the portal by the municipality.

Support: All questions or assistance related to the Candidate Portal must be addressed to the Town Clerk.

It is recommended that the candidate bookmark the access link:

www.candidateaccess.ca

Please note, your access to the Candidate Access Portal will cease on October 25, 2022 at 12:00am.

Accessing the Portal

Access to the portal is granted by the Clerk's Office to certified candidates following Nomination Day on August 22, 2022.

Once a candidate has been configured as a user in the Candidate Access Portal, the candidate will automatically receive an email from mvvsupport@datafix.com with their access details, including the link to the portal and a temporary password as shown on the next page in the example **Figure 2.0**.

The password must be changed after the initial login and the application will prompt the candidate for a password change. Initial credentials will be found in the welcome email generated from Municipal Voter View.

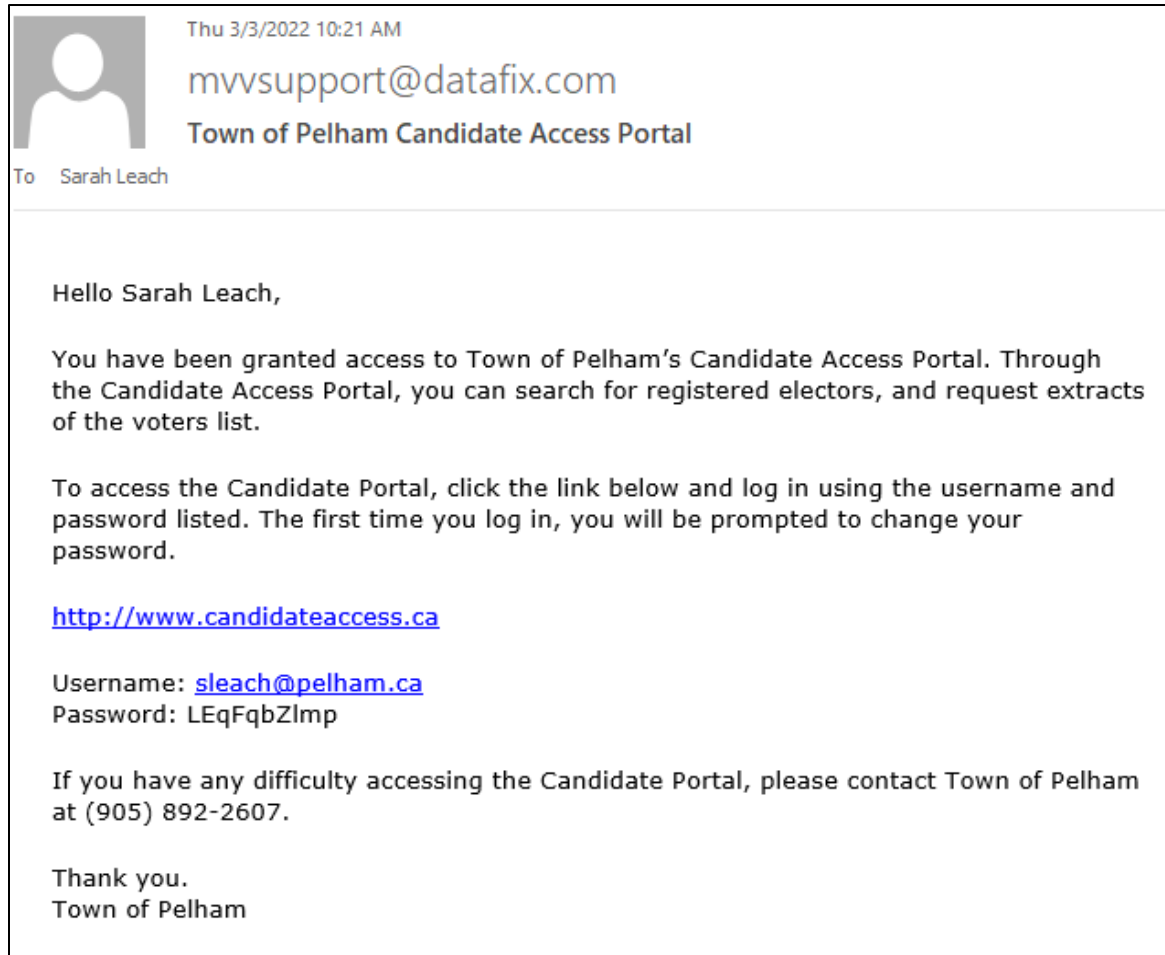
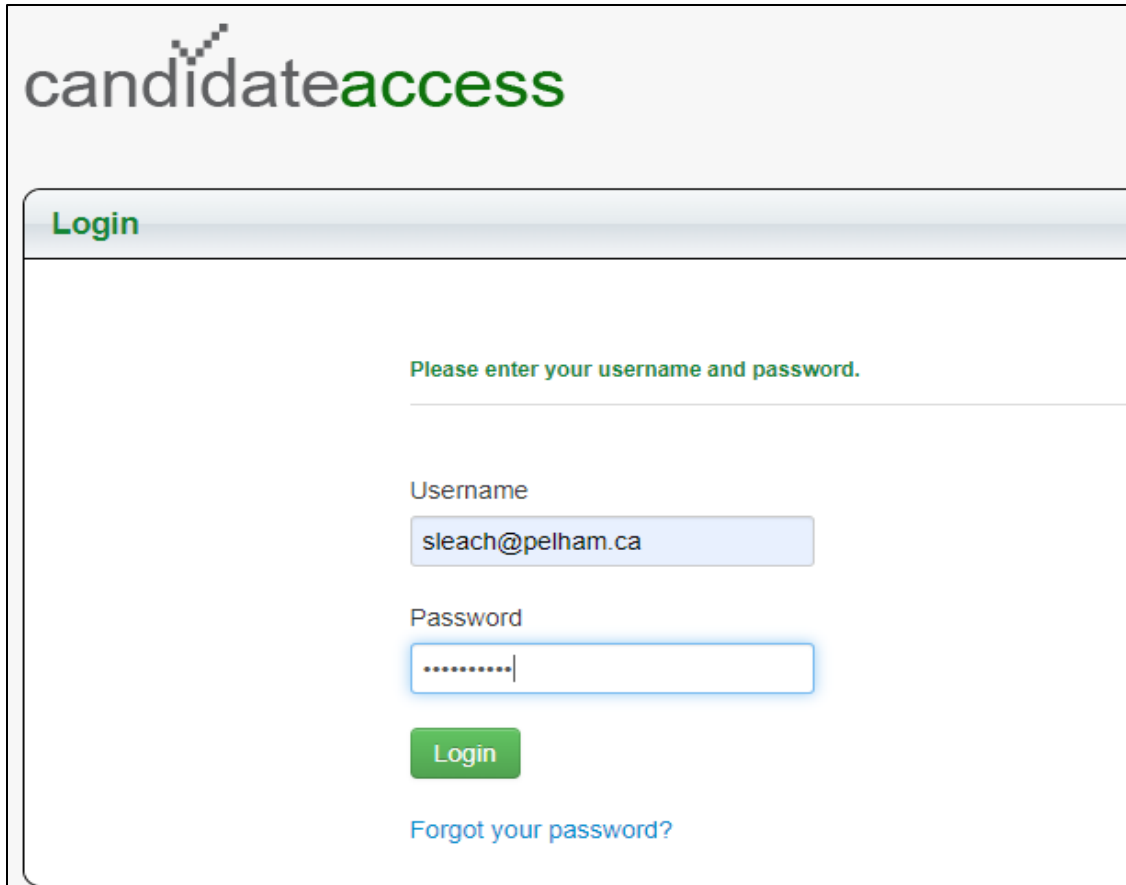


Figure 2.0

When you click the link, the Candidate Access Login screen displays. You are required to enter the credentials provided to you as shown in **Figure 2.1**.



The screenshot shows the 'candidateaccess' login page. At the top is the logo. Below it is a 'Login' header. The main content area contains the instruction 'Please enter your username and password.' followed by two input fields: 'Username' with the value 'sleach@pelham.ca' and 'Password' with masked characters. A green 'Login' button is below the password field, and a blue link 'Forgot your password?' is at the bottom.

candidateaccess

Login

Please enter your username and password.

Username
sleach@pelham.ca

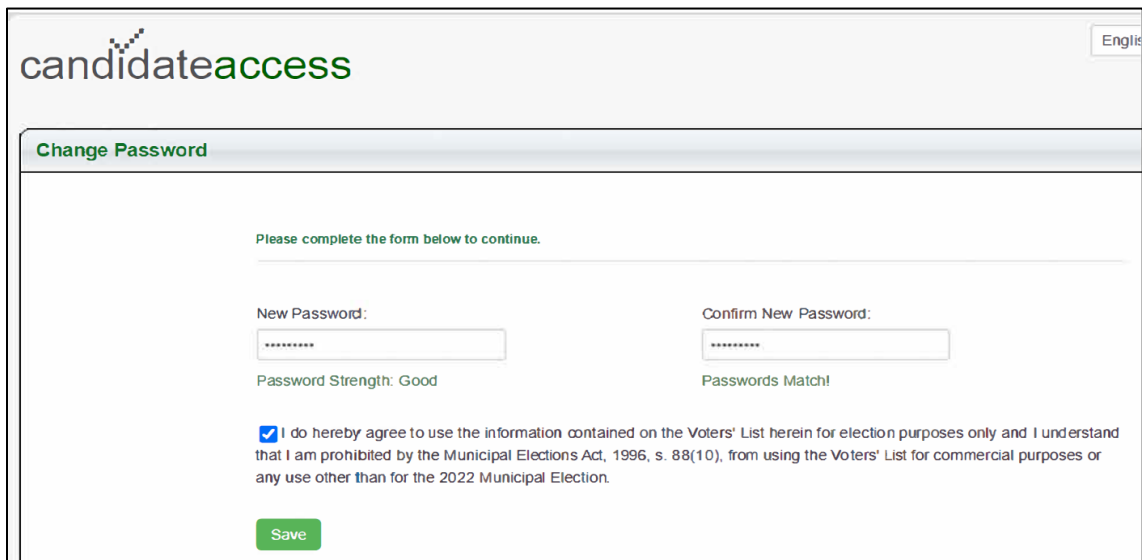
Password
.....

Login

[Forgot your password?](#)

Figure 2.1

Upon entry to the Candidate Access Portal, the candidate will be required to agree to the terms of use of the information contained on the Voters' List as shown in **Figure 2.2**.



The screenshot shows the 'candidateaccess' 'Change Password' page. It includes a language selector 'English' in the top right. The page has a 'Change Password' header. Below is the instruction 'Please complete the form below to continue.' followed by two password input fields: 'New Password:' and 'Confirm New Password:'. Both fields show masked characters. Below the first field is the text 'Password Strength: Good', and below the second is 'Passwords Match!'. A checkbox is checked, followed by a paragraph of terms and conditions. A green 'Save' button is at the bottom.

candidateaccess English

Change Password

Please complete the form below to continue.

New Password:
.....

Confirm New Password:
.....

Password Strength: Good

Passwords Match!

☒ I do hereby agree to use the information contained on the Voters' List herein for election purposes only and I understand that I am prohibited by the Municipal Elections Act, 1996, s. 88(10), from using the Voters' List for commercial purposes or any use other than for the 2022 Municipal Election.

Save

Figure 2.2

After all required information is completed and saved, the candidate portal opens to the main screen as shown below in **Figure 2.3**.

The screenshot shows the 'candidateaccess' portal interface. At the top, there is a language dropdown set to 'English' and a user status message 'You are logged in as Sarah Leach' with a 'Logout' button. Below this is a navigation bar with links: Search, Extracts, Revision Report, Documents, and Change Password. The main content area is titled 'Elector Search' and contains a 'Search For Electors' form. The form includes input fields for Last Name, First Name, and Elector ID. Below these are fields for Street Number, Street Name, and Unit. There is a Ward dropdown menu currently showing '01'. At the bottom of the form are a Poll dropdown menu, a Voter Sequence input field, and a Voted dropdown menu. A green 'Search' button is located at the bottom right of the form area.

Figure 2.3

The information you can access is set by the Town Clerk/ Returning Officer. Please contact Ms. Holly Willford with any questions:

Holly Willford
 Town Clerk/ Returning Officer
 Email: hwillford@pelham.ca
 Direct Phone Number: 905-980-6657

Portal Features

The following section describes how to use the features of the portal:

Elector Search

From the Home screen, you can search for registered electors in your constituency by last name, street name or elector ID.

Searching by Name

To begin the search, starting typing in the Last Name field. Optionally, you can add a first name to narrow your search.

Press enter or click the Search button to continue.

The application automatically displays all matches for the name that you are typing.

Click on the name of the elector to retrieve voter details as displayed on the following page in **Figure 3.1**.

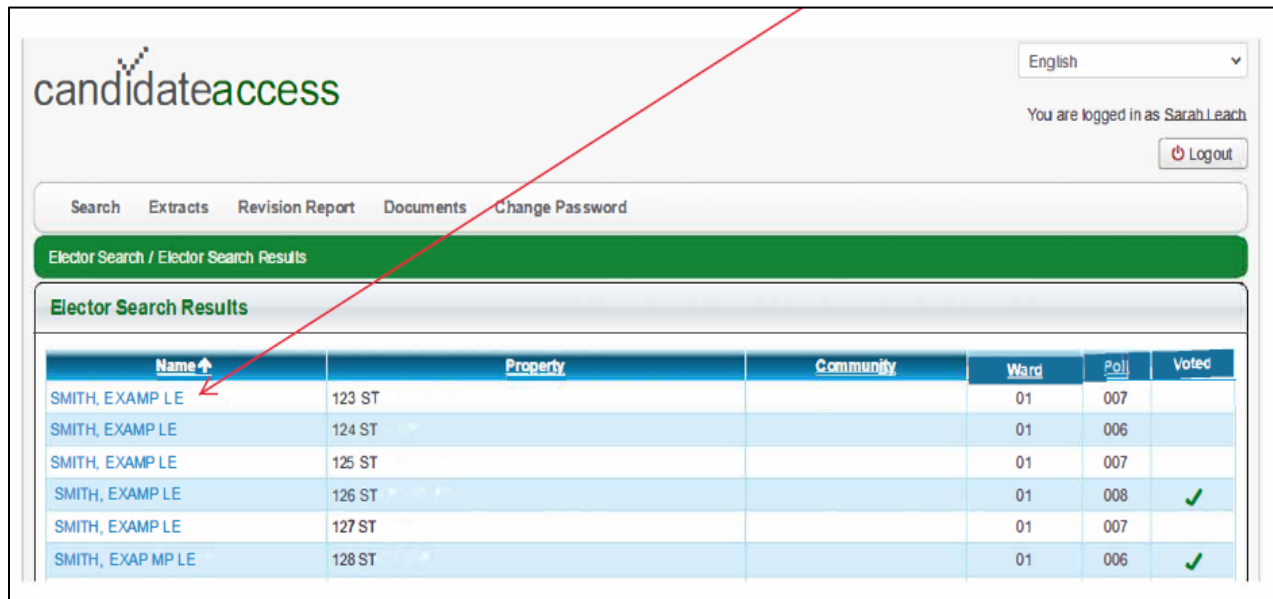


Figure 3.0

The screenshot shows the 'candidateaccess' portal interface. At the top, there is a language dropdown set to 'English' and a login status 'You are logged in as Sarah Leach' with a 'Logout' button. Below the navigation bar (Search, Extracts, Revision Report, Documents, Change Password), the breadcrumb trail reads 'Elector Search / Elector Search Results / Elector Details'. The main section is titled 'Elector Details' and contains the following information:

Personal Information

Last Name: SMITH First Name: EXAMPLE
 Middle Name: A Voter Sequence:

Voting Information

Elector ID: 123
☐ This Elector Has NOT Voted.

Mailing Address

Mailing Address: 123 STREET
 RR1
 City: FENWICK Province: ON
 Postal Code: L0S 1C0 Country: CANADA

Property Address

Property Address: 132 STREET
 Community:
 Ward: 01 Poll: 007 Poll Suffix:

Figure 3.1

Searching by Street

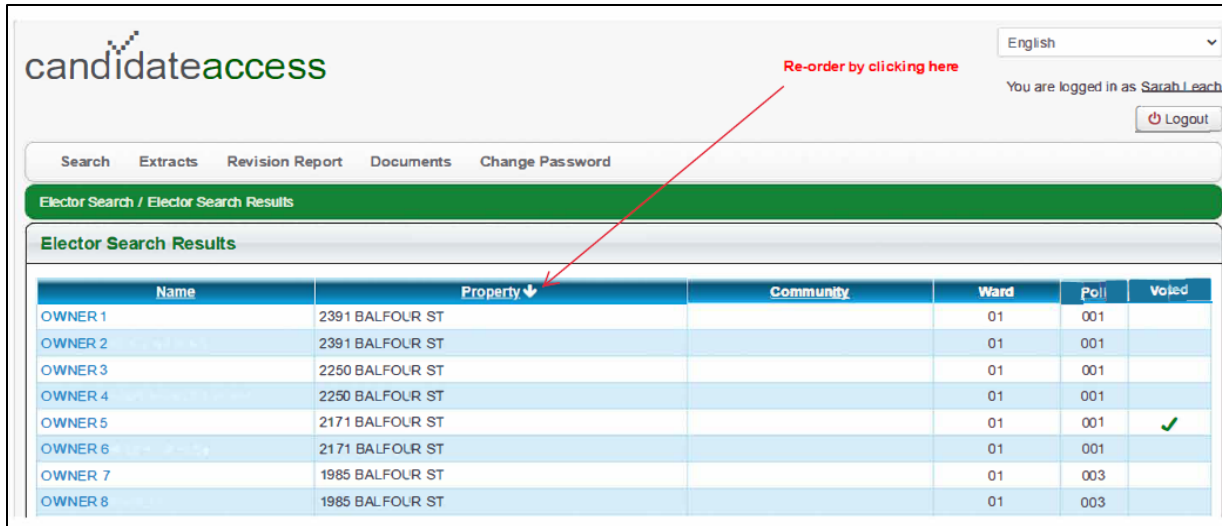
To find electors by their street name or to view how many electors reside on a street in the applicable constituency, start typing in the Street Name field on the Home Screen and the application automatically displays all matches for the street name that you are typing, as displayed below in **Figure 4.0**.

The screenshot shows the 'candidateaccess' web application interface. At the top, there is a header with the logo, a language dropdown set to 'English', and a login status 'You are logged in as Sarah Leach' with a 'Logout' button. Below the header is a navigation bar with links: 'Search', 'Extracts', 'Revision Report', 'Documents', and 'Change Password'. The main content area is titled 'Elector Search' and contains a 'Search For Electors' form. The form has several input fields: 'Last Name', 'First Name', 'Elector ID', 'Street Number', 'Street Name', and 'Unit'. The 'Street Name' field is highlighted with a red arrow. There are also dropdown menus for 'Ward' (set to '01'), 'Poll', and 'Voted'. A 'Voter Sequence' button is present. A green 'Search' button is at the bottom right of the form.

Figure 4.0

If more than one elector resides on the chosen street, the Elector Search Result screen displays showing all electors on that street.

You can re-order the columns by clicking in the column headings, as shown on **Figure 4.1**.



The screenshot shows the 'candidateaccess' portal interface. At the top, there is a language dropdown set to 'English' and a login status 'You are logged in as Sarah Leach' with a 'Logout' button. Below this is a navigation bar with links: Search, Extracts, Revision Report, Documents, and Change Password. The main content area is titled 'Elector Search / Elector Search Results' and 'Elector Search Results'. It contains a table with the following data:

| Name | Property | Community | Ward | Poll | Voted |
|---------|-----------------|-----------|------|------|-------|
| OWNER 1 | 2391 BALFOUR ST | | 01 | 001 | |
| OWNER 2 | 2391 BALFOUR ST | | 01 | 001 | |
| OWNER 3 | 2250 BALFOUR ST | | 01 | 001 | |
| OWNER 4 | 2250 BALFOUR ST | | 01 | 001 | |
| OWNER 5 | 2171 BALFOUR ST | | 01 | 001 | ✓ |
| OWNER 6 | 2171 BALFOUR ST | | 01 | 001 | |
| OWNER 7 | 1985 BALFOUR ST | | 01 | 003 | |
| OWNER 8 | 1985 BALFOUR ST | | 01 | 003 | |

Figure 4.1

From the Elector Search Results screen, you can view the name and address of the elector, the ward and poll information (if applicable), and whether or not the elector has voted.

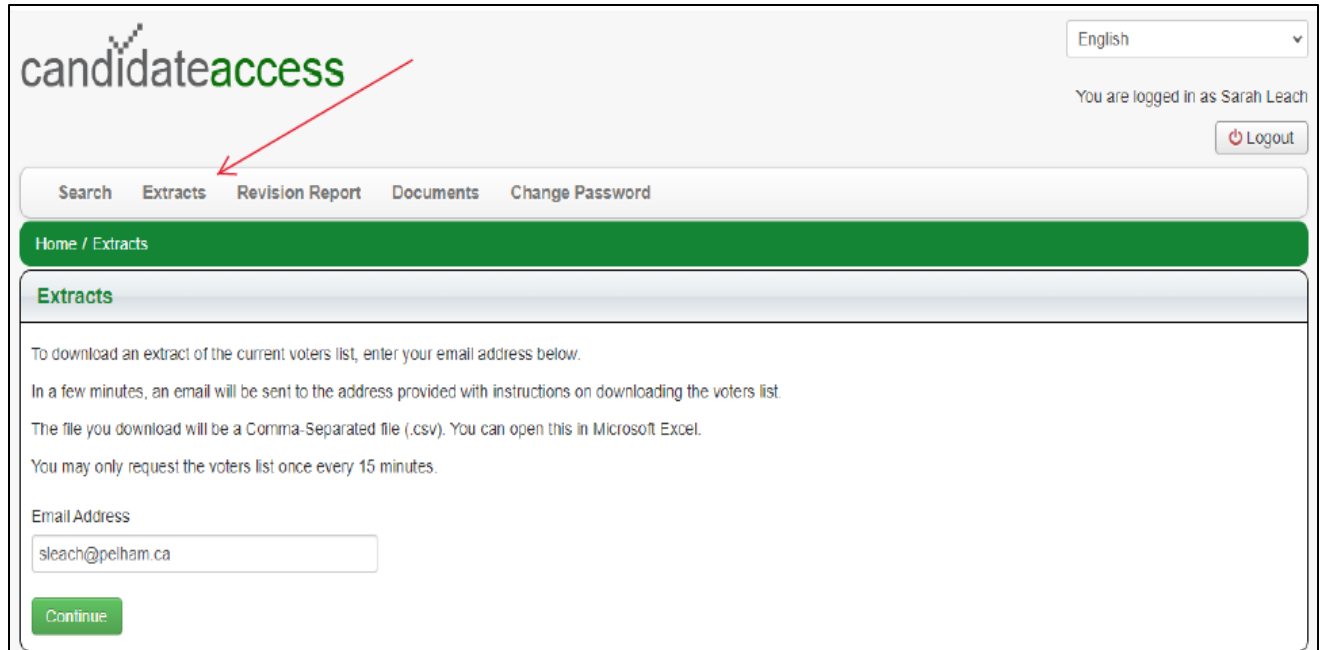
Downloading an Extract

You can request an extract of the current Voters' list of registered elector's in your constituency through the Extracts screen.

Note: The frequency at which you can download an extract is every 15 minutes.

To request an extract of the voters list:

1. Click Extracts from the main menu (see **Figure 5.0** on the following page);
2. If desired, change the email address to which the extract will be sent;
3. Click continue.



The screenshot shows the 'candidateaccess' portal interface. At the top right, there is a language dropdown set to 'English' and a login status 'You are logged in as Sarah Leach' with a 'Logout' button. The main navigation bar includes links for 'Search', 'Extracts', 'Revision Report', 'Documents', and 'Change Password'. A red arrow points to the 'Extracts' link. Below the navigation bar is a green breadcrumb trail 'Home / Extracts'. The 'Extracts' section contains instructions for downloading a voters list extract, a text input field for an email address (containing 'sleach@pelham.ca'), and a green 'Continue' button.

candidateaccess

English

You are logged in as Sarah Leach

Logout

Search Extracts Revision Report Documents Change Password

Home / Extracts

Extracts

To download an extract of the current voters list, enter your email address below.

In a few minutes, an email will be sent to the address provided with instructions on downloading the voters list.

The file you download will be a Comma-Separated file (.csv). You can open this in Microsoft Excel.

You may only request the voters list once every 15 minutes.

Email Address

sleach@pelham.ca

Continue

Figure 5.0

After you click continue, a message will appear stating “The extract has been requested. You will receive an email with instructions on downloading the extract shortly.”

As shown in **Figure 5.1**, you will receive an email with the link for downloading the extract (Please allow 3-5 minutes).

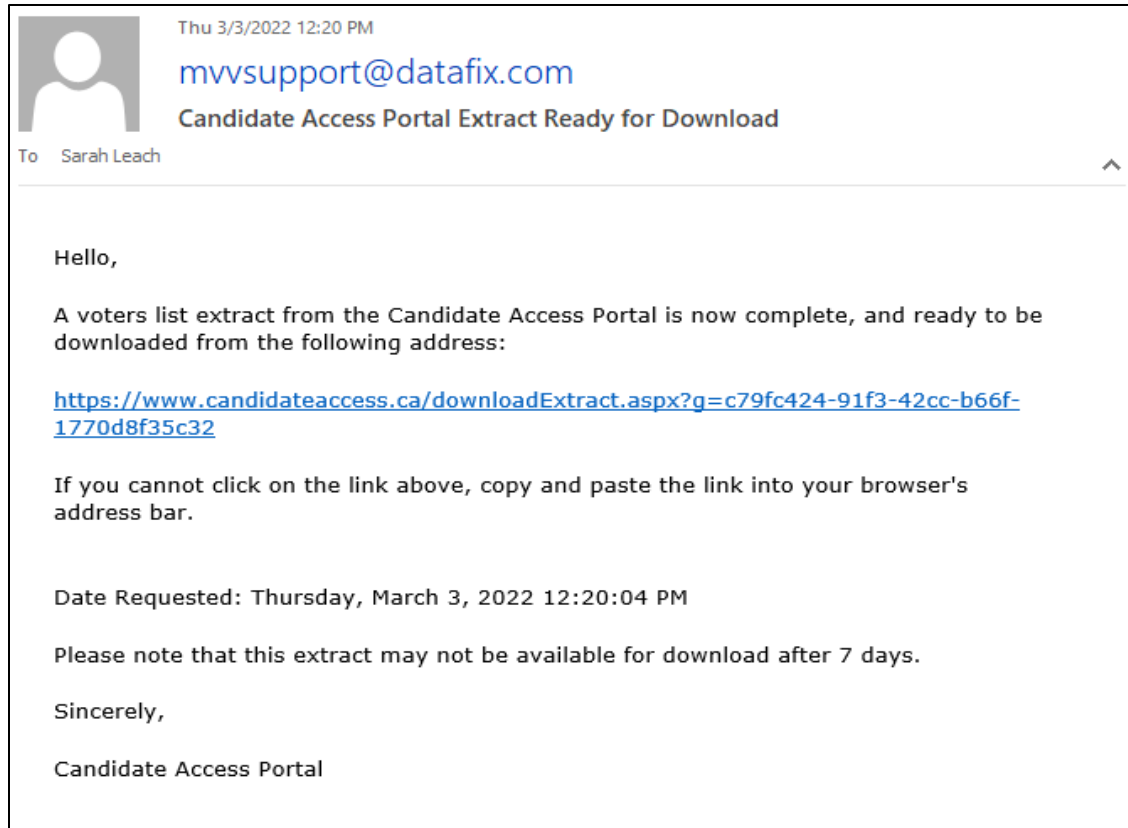


Figure 5.1

When the email has been received, click the link or paste it into your browser.

Click Download to access the extract.

Note: the report is available in Excel format.

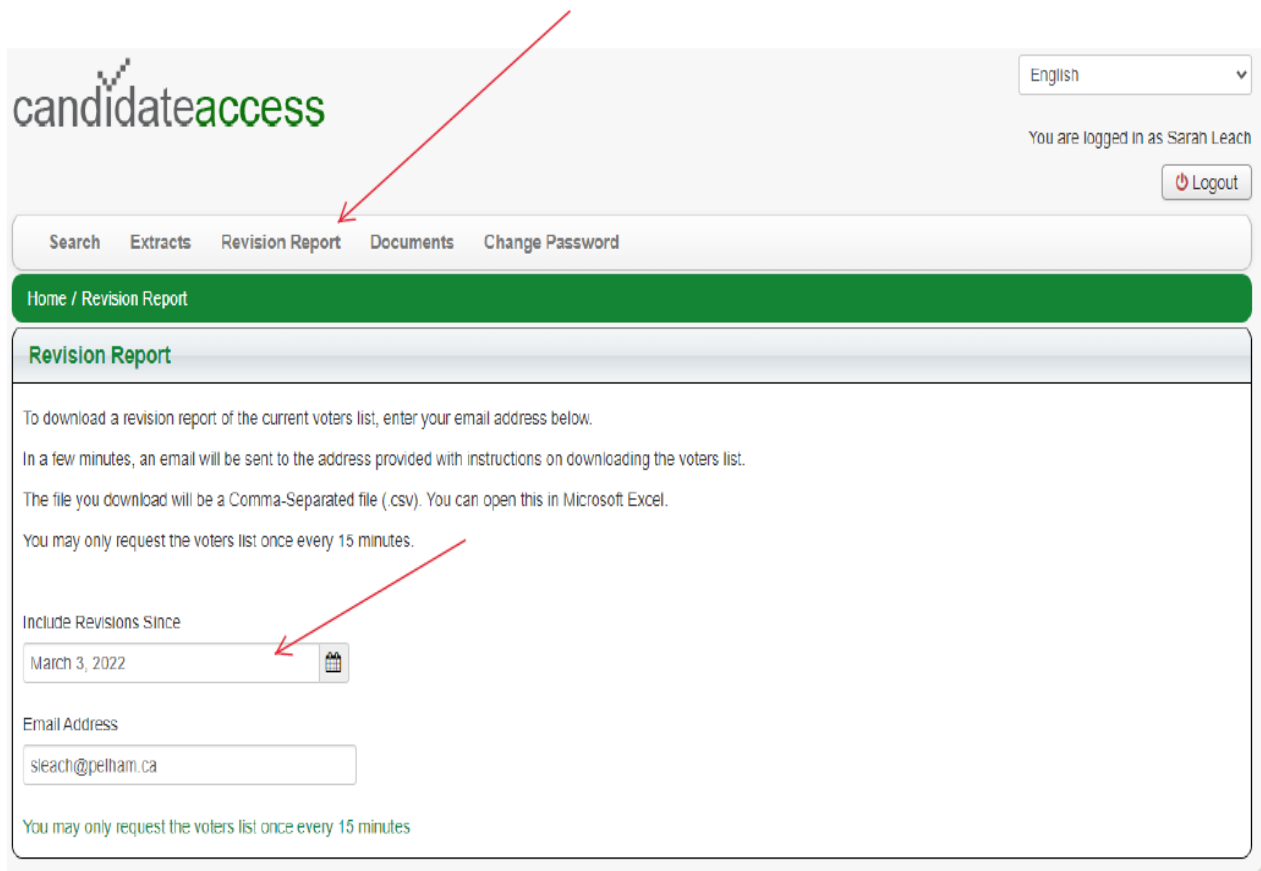
Downloading a Revision Report

You can request a revision report of the current list of registered electors in your constituency.

To request a revision report, click the Revision Report tab from the main menu.

Note: The frequency at which you can download an extract is every 15 minutes.

Select from the "Include Revisions Since" drop-down menu, a date from which to include changes, as shown below in **Figure 6.0**.



candidateaccess

English

You are logged in as Sarah Leach

Logout

Search Extracts **Revision Report** Documents Change Password

Home / Revision Report

Revision Report

To download a revision report of the current voters list, enter your email address below.

In a few minutes, an email will be sent to the address provided with instructions on downloading the voters list.

The file you download will be a Comma-Separated file (.csv). You can open this in Microsoft Excel.

You may only request the voters list once every 15 minutes.

Include Revisions Since

March 3, 2022

Email Address

sleach@pelham.ca

You may only request the voters list once every 15 minutes

Figure 6.0

The application confirms the revision report request and will send an email with instructions for downloading the report. (Refer to **Figure 5.1**).

Click the link in your email or paste it into your browser.

Click Download to retrieve the extract.

Why is a Revision Report a Useful Tool?

As electors add themselves to the Voter's List and/ or update their personal information, this will become visible using the Revision Report.

As well, the Revision Report will show you who has voted at each advanced poll. This information is live and can be requested every 15 minutes.

Viewing Documents in the Portal

The Town Clerk/ Returning Officer will use this tool in communicating with you. Important documentation will be uploaded to the Documents tab as it

becomes available, as shown below in **Figure 7.0**. To view documents in the portal, click on the Documents Tab to display the contents.

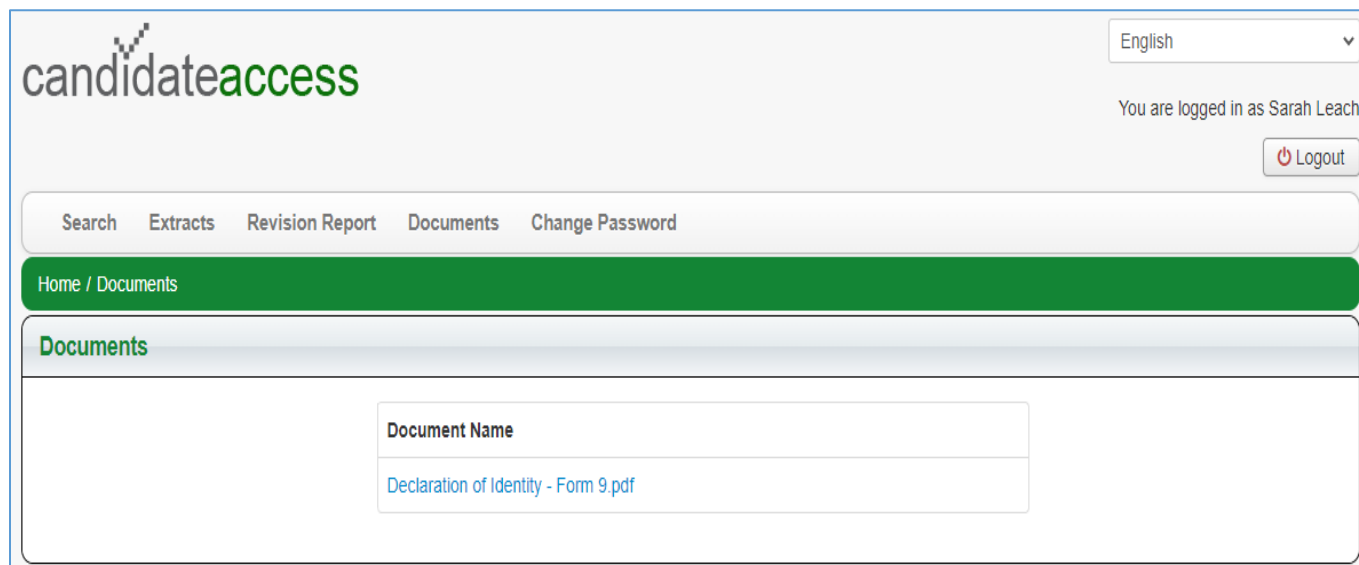


Figure 7.0