

From: [Nunn, Angela](#)
To: [Janet Ellis](#); [Power, Rebecca](#); [Aldrich, Ginger](#)
Cc: [Jacobsen, Christi](#); [Corson, Dana](#); [Fuller, Stuart](#); [McLarnon, Melissa](#)
Subject: RE: Request for meeting on electMT
Date: Thursday, November 11, 2021 12:52:09 PM
Attachments: [ElectMT letter 10-29-21.docx](#)
[ElectMT Readiness Criteria.docx](#)
[image001.png](#)

Dear Senator Ellis -

Thank you for your interest in the electMT project and for reaching out to us to learn more.

The electMT start date is ultimately a data-driven decision, which will be made by December 20 with transparency and for what is best to uphold election integrity in Montana to ensure our elections are secure. Project management is in place to review go-live criteria and test to ensure its readiness. We are grateful to our election officials and confident in achieving our shared goals.

I understand that Audrey McCue provided the SAVA committee the letter that was sent to our office by the EA Project Team Members. Attached is the response and related attachment that was provided to them on 10/29/21.

Currently, the Elections team is focused on working with the vendor, testing the system, and refining the go-live criteria so that we have adequate data to make the best decision. It is our understanding, in reviewing the recording of the SAVA meeting, that this topic will be placed on the agenda for the December 16th meeting. We are open to meeting with you and the committee prior to that date, but out of respect for your time, would prefer to wait to schedule until we have more information to share. We would like to reiterate that at this time no decision has been made.

Rebecca/Ginger - can you please share this information with the committee?

Warm regards,

Angela



Angela Nunn | Deputy/Chief of Staff
Montana Secretary of State, Christi Jacobsen
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Helena, MT 59601
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-----Original Message-----

From: Janet Ellis <janet.ellis@mtleg.gov>

Sent: Tuesday, November 9, 2021 4:24 PM

To: Jacobsen, Christi <CJacobsen@mt.gov>; Corson, Dana <DCorson@mt.gov>; Fuller, Stuart <Stuart.Fuller@mt.gov>; Nunn, Angela <Angela.Nunn@mt.gov>; McLarnon, Melissa <Melissa.McLarnon2@mt.gov>

Cc: Power, Rebecca <Rebecca.Power@mt.gov>; Aldrich, Ginger <KVAldrich@mt.gov>

Subject: [EXTERNAL] Request for meeting on electMT

Dear Secretary Jacobsen and Secretary of State Election Staff -

I would like to schedule a meeting with you to discuss implementation of electMT. As you know, the legislative State Administration and Veteran Affairs (SAVA) Committee, which I chair, oversees the Secretary of State's office and election issues. At our November 4, 2021 SAVA meeting, several members of the County Development Team providing input on electMT presented concerns surrounding your agencies' timeline to complete this project, as well as related issues. I would like to schedule a meeting to learn first hand from your office about electMT and plans to implement it.

Today I am writing you as an individual. When we find a mutually agreed upon time for the meeting, I would like to invite all members on the SAVA committee to participate in the meeting if their schedules allow.

My contact information is below. If it is easier to call me, please do. I look forward to hearing from you soon.

Thank you in advance for agreeing to this meeting.

- Senator Janet Ellis

P.S. I tried to include individuals on this email who I have noticed are working on this project. If there are other individuals who should be involved in this meeting, please invite them.

--

Senator Janet Ellis

Montana Legislature, Senate District 41 P.O. Box 385 Helena, MT 59624

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CHRISTI JACOBSEN

MONTANA SECRETARY OF STATE



December 2, 2021

To: ElectMT EA Project Team Members

Dear Team Members,

I would like to express my appreciation of the hard work that you have put into the ElectMT project over the last several years. The project has had ups and downs, including a first delay before the 2020 election. As previously discussed, the sustainability of MT Votes has been substantially declining over the past several years and needs to be replaced.

I appreciate your concerns about the project and how it stands today. Please allow the Project Management process to work, resume your commitment, and continue to work hard on the project so it is ready to go live in 66 days on January 3rd. The Secretary of State's Office has added staff and is working diligently to prepare the system. This cannot be done without the dedication of the EA Project Team and your continued support.

The upcoming December 20th meeting is a key date that will determine the decision to go live based on readiness criteria, and a draft of that criteria is attached. Examining the criteria and the status of the system on that date will support the decision. Please provide input that addresses specific tangible concerns about the system.

Specific concerns are addressed below:

- **Parallel and end-to-end testing.** This is a shared concern and will be addressed by conducting additional mock parallel testing and end-to-end testing. Bradley Seaman, the designated EA product owner, suggested at least a three-day, end-to-end testing event to be held in Helena. The Secretary of State team supports that decision. The end-to-end testing will provide tangible data for the go-live decision.
- **Data conversion testing.** This process has been slow since the start of the project, but please know that we have made great progress in addressing issues. Recently, several areas have been identified where bad or misconfigured data in MT Votes is the problem instead of the data conversion process. Testing will continue with additional staff and Election Administrators. BPro is also working on a set of data conversion quality tests and scripts which will be used

October 29, 2021

during data conversion to ensure that the final set of data converts from MT Votes correctly. BPro is investigating third party software tools to assist in that effort.

- **Resource limitations.** HAVA grant funds are available for counties to request for purposes of administration of elections, enhancing technology, and making election security improvements. If a county requires additional funding resources to specifically support the project, please make a grant fund request for those resources.
- **Rules and laws for current and future elections.** The Secretary of State's Office is committed to continuing to provide guidance to counties on processes, rules, and laws for current and future elections.
- **Training.** Training has already been provided in five different locations around the state. An additional virtual refresher training will occur in December. The Missoula training videos will soon be available to Election Administrators. The user guide will also be provided, and extensive training on the system will be available during the February EA certification event in Billings. The Help Hero is nearing completion and will provide on-screen guides to users.

In conclusion, please continue to support the project as we work together to deliver the new system to you.

Sincerely,



CHRISTI JACOBSEN
Secretary of State

CJ:sba
Att.

People Readiness	Comments
User roles / permissions / access setup complete for electMT	Roles and permissions have been setup and created through user stories as well as from previous customers. MT has adapted the roles and permissions to better suit MT users. Users at the county levels have been trained on how to setup new roles and add permissions as well as remove permissions based on their specific needs. SOS has encouraged counties to track and be very specific on what permissions are being assigned to users. Users from MT Votes have been transferred in August. Adding user table conversion to next data conversion run.
Initial Training Complete	Initial training was completed September 2021. 114 out of approximately 135 users were trained.
Training materials available	Training Manual/User Guide is in DRAFT form, BPro is working to finalize this. Six Help Hero process flows have been created in the TEST environment. SOS and BPro will add more flows as needed.
Virtual Refresher User Training complete	Refresher training is planned to be scheduled the week of December 13 th . (TBD on end-to-end testing event)
EA Certification Training Complete SOS Staff ready to provide support	This training is post Go Live in February 2022 SOS has been testing the system along with the EAs, the election specialists will be tier 1 support. They will triage the tickets and escalate as necessary to Tier 2 support of the project team and then to BPro as Tier 3.
Operational Support Plan documented and communicated with adequate Go-Live capacity	Deliverable collaboration with BPro, included will be support and moving forward with maintenance, sprint cycles for hot fixes and phase 2 requirements

Data Readiness	Comments
Configure ALL electMT servers	Final number of production servers is pending performance & load testing (see below).
Data conversion complete / validated	This process is continual and is in testing currently. Final data conversion is scheduled for the week of December 27 th .
A rollback plan completed and published	BPro/SOS Collaboration

Process Readiness	Comments
Baseline measurements gathered	The original gap analysis for the minimal viable product has been completed, throughout the sprints new stories for additional gaps found have been added and developed. Currently in the "Bug Correction Sprint" which contains bugs found during training and testing as well as additional gap stories.
Refine, finalize user stories	This has been a continual effort throughout testing of the system to find the gap stories that have been written
Business processes are approved	Election Administrators have been involved in the project and all business processes that will change have been approved. Example is MVD registrations, realizing each county may handle things

Interfaces Ready (DOJ, COR, HHS)	differently, the overall main process is an improvement. User stories address key functionality.
Maintenance and support operations schedule available	The interface connections are established. Files/records are uploaded into electMT from COR and HHS. The web service connection is functioning for DOJ for both MVD registrations and voter verify. BPro working on the location of the results of the COR and HHS jobs. electMT will be added to SITSD's regular maintenance schedule. BPro will be included in the notification for this maintenance weekend moving forward. Publication of planned cycle of maintenance and support in the operations support plan
Update all system documentation for project closeout	Will finalize near go live
Conversion / Go-Live Plan completed and published	Step by Step plan for conversion week including milestones and decision points. Contains roll-back plan mentioned in data readiness.

Tools Readiness	COMMENTS
Job Aids Ready	HelpHero flows currently exist for 6 processes. Additional aids will be the training document/user guide, FAQs, terminology list, etc
Finalize Technical Requirements	Setup and Configuration document has been continually updated with changes that have been implemented
<u>All Phase 1 Scope Complete</u>	All user stories/requirements for phase one will be completed with the current sprint pending end to end testing and any gaps found
<i>Voter Registration complete</i>	Users can add, update and transfer voters. The date logic is implemented to assign the correct eligibility status, voter verify is functioning properly, historical data is displaying, etc
Add/Update Voter	
Transfer a voter	
Quick search	
Advanced search	
Work tasks on Dashboard	Scan form, send notices, etc
NCOA/NVRA processes	
Process MVD	
Process UOCAVA/FPCA	
<i>Election Management complete</i>	Users can create an election, set up ballots by adding ballot measures and races, add a candidate, create ballots styles, process/generate ballots and receive ballots. Registers can be created, and voter credit assigned via the scanning of registers
Setup/Create election	
Setup/Create ballots	Add races, candidates and ballot measures. Create ballot styles and ability to void stubs by range
Setup Voting Locations and associate to election	
Registers	Create registers, print, scan and assign voter credit
Process Ballots - Outbound	
Process Ballots - Return/Inbound	

Provisional Ballot processing	
Ballot Search	
<i>Public Portal complete</i>	
My voter page	Voter can look up and see their information, voter status, voting location, ballot status, sample ballot
Voterfile	Public can purchase voter files via online and download immediately
<i>Candidate filing complete</i>	
Submit a filing	Candidates can file online for statewide offices
View Candidate list	Candidates lists for the most recent statewide election is available
<i>Petitions complete</i>	Petitions can be added, voter petition credit can be added, complete and sent to the state and state can process
Create petition at statewide or county level	
PreProcess petitions Page	Enter submittal pages, receive bulk sheets, add circulator from voter record or manually, print single or range of receipts for submittals and specific dymo label
Enter signatures	Enter name of signer and ties to voter record with the most recent signature displayed and the ability to hover and see additional signatures from voter record. The ability to reorder lines by dragging and dropping is available on this screen
Submit petition to state	Print 'PM 009', scan and upload submittals with ability to check a box and submit to state for review/approval
State petition function	State can approve or deny petitions from dashboard, if denied the system will send a note back to the county dashboard to resolve
<i>Total Address complete</i>	Total Address system is functional
E911 and MT Votes address points loaded	
Address points can be added for new locations	
Available split maps loaded	
Data conversion testing of address points precinct split assignments	
Reports are functional	
<i>Reports complete</i>	Identified Key reports are functional and working for both new and historical data as appropriate
Voter Registration	
Election Management	
District and Precincts	
Petitions	
Labels	
Ballot Processing	
Fiscal	
<i>Utilities complete</i>	Utilities are functional
Impersonate user	
County Office Information	
Notice Management	

Users	
Districts	
Precinct Splits	
Election Night Reporting and interface complete	Finalizing in current sprint
Ancillary devices tested	Handheld scanner, Dymo label printer, Document Scanner, & Printer
Scanners	Variety of scanners tested including Canon and Fujitsu
Handheld scanners	Test several handheld scanners
Dymo label printer	Test several models of Dymo label printers. (Known issue with Dymo web service needed to allow printing from browser)
Printer	Test several printer models

Testing Readiness	Comments
Unit Testing complete	Specific area testing
UAT testing complete	UAT Testing is an ongoing task within the electMT program.
Load and Stress Testing Complete	
Mock Parallel Testing Complete	
End to End Testing Complete	
Accessibility Testing	Lighthouse 508 compliance reports

IT Readiness	Comments
DEV/QA Environments accessible via Citrix for EA/METAC group	
TEST/PROD Environments accessed via the web	
Backup and DR plan completed	
System Fail-over and DR testing completed	
Security and IT policy compliance assured	
Security protection measures in place	
Security penetration testing completed	
Security Server and application scans completed	