Using Mobile Canvasser App (MCA)

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Mobile Canvasser overview

Overview

This guide is aimed at users of MCA.

The guide contains all features of the application, however, your authority may give further instruction on how to conduct the canvass using this application.

Users will only have access to the functionality that has been assigned to them. For example

- Door Knock mode only
- Telephone Canvass mode only
- Both Door Knock and Telephone Canvass modes

The guide shows the layout of the screens and icons used for both modes up to page 13.

Signing in

The app is available from the Home screen

You may have to select the Apps icon and swipe across to the second page to see the Mobile Canvasser icon:

Tap to show the log-in screen.

Canvassers can then log-in with the email address and password which the Electoral Office have assigned to the them.

Switching between Door Knock and Telephone Canvass Modes

The login screen a Canvasser sees will depend on which modes have been set up for the canvasser. If the canvasser is only set up for Door Knock mode or Telephone Canvass mode, the system will open in that mode.

- Door Knock Mode _ personal visits to properties
- Telephone Canvass Mode - Telephone calls to eligible electors

If the canvasser has been set up with both modes, selecting the blue mode button above the sign in details brings up a Select Mode screen to choose the function needed :

 The mode can also be changed when already logged in using the icons at the top of the screen in Streets view
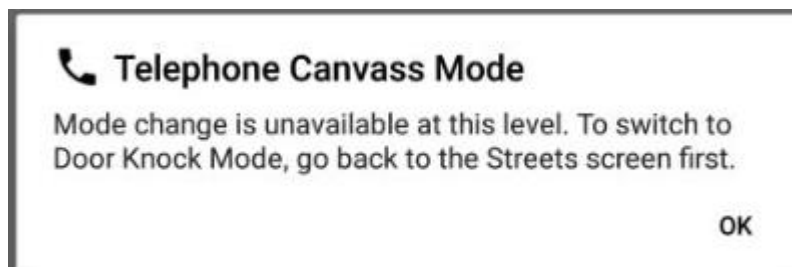
  the tablet is in Door Knock mode. Tap to see an option to change to Telephone Canvass mode if you have been given access to this mode.

 the tablet is in Telephone Canvass Mode. Tap to change to Door Knock mode if you have access to both modes.

The mode can only be changed in Streets view, trying to change the mode in another view will bring up the message:
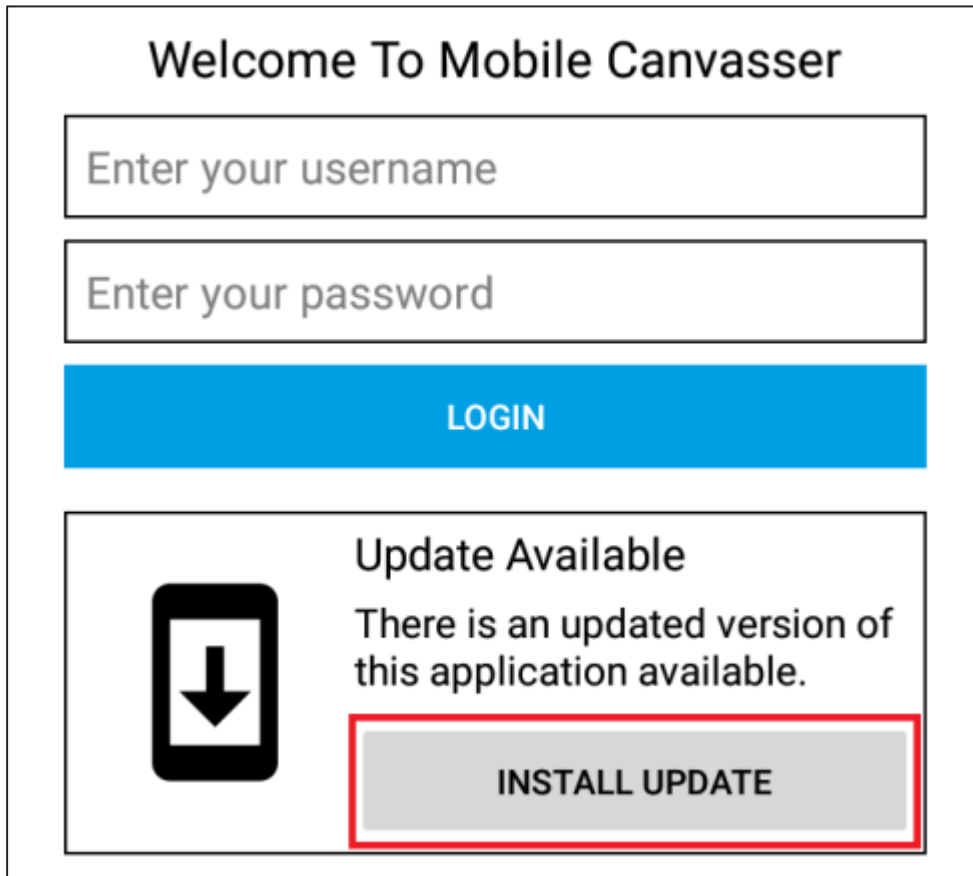

The mode can also be changed using the option in the top right of the screen and selecting Mode.
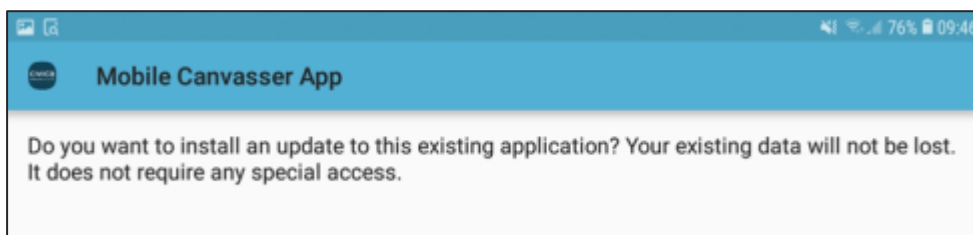
Updating the App

If an update is available for the app, a message box appears on the MCA login screen. On-screen instructions are displayed - the process is replicated here:

1. At the MCA login screen, tap INSTALL UPDATE:

2. Wait for the app to download and install
3. If you see a message to unblock the app, tap SETTINGS
4. Once on the Settings screen, tap *Security | Install unknown apps*
5. Tap the **Mobile Canvasser App** icon and enable the slider for Allow from this source
6. To confirm that you want to install the update, tap **Install** in the bottom right corner of the screen:

7. Leave the app to install. Once complete, the installed version number will be displayed in the top left corner.

Signing In

After entering your username and password and selecting the LOGIN option, the following message will appear
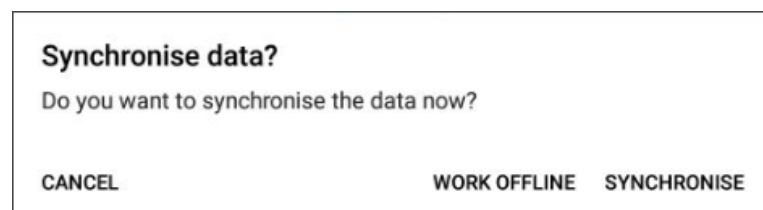
This gives the option to Synchronise the data or work offline.

If the SYNCHRONISE option is taken this will submit any information gathered by the canvasser to the Electoral Office. If there have been updates to the properties made by the Electoral Office, the properties will be updated in MCA.

If WORK OFFLINE is chosen, the tablet will not synchronise, and any work undertaken will be saved on the tablet ready to be synchronised later. This option is useful if there is no internet connection available.

Mobile Canvasser App (MCA) layout

MCA is organised by Street, Properties and Elector layers. After logging in to MCA the Streets view will display. This is a list of streets where there are properties still requiring contact for a response to the canvass.

Search and Task bar icons

Across the top of the screen are icons, these will vary depending if you are in Door Knock or Telephone Canvass mode.
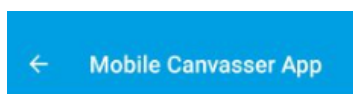
 The back button at the top left of the screen is used to return back to the previous layer. For example, if in Property Details view, the back button would return to the list of Properties and pressing again would return to the Streets layer.

 This icon indicates the tablet is in Door Knock mode. Tap to see an option to change to Telephone Canvass mode if you have also been given access to this mode.

 This icon will display if using in Telephone Canvass Mode. Tap to change to Door Knock mode if you have access to both modes.

The GPS pin icon is only available In Door Knock mode and if GPS is activated on the tablet. Tap the icon to enter a map view to see where properties are to be visited within a Canvass Area or street or the location of a property.
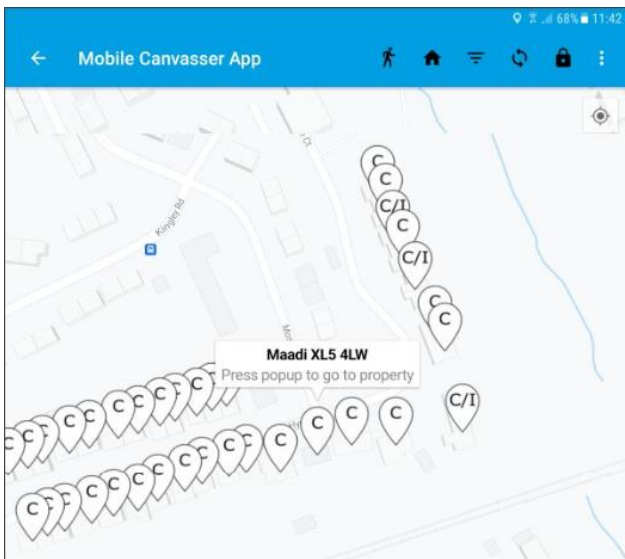
Different pin locations will show different information:

- The pin at the street level top bar will show all properties allocated to the canvasser
- The pin at the property level top bar will show all properties allocated to the canvasser in that street
- The pin against each property will show the location of that specific property.

When the map view is open, pressing on a pin will open the corresponding property details on the tablet ready for completion.

A property pin will reveal any outstanding actions that need to be taken at that property e.g. C/I indicates that both a Canvass Form and an ITR are outstanding.

Tapping on the white information box opens the property in Mobile Canvasser. Blue coloured pins show the properties which have been completed (if Show Completed Items is ticked in Preferences).

the home key displays in Door knock mode only, use to return to the Streets home screen. When on the home screen this icon does not display.

enables filtering by outstanding visits or re-visits already scheduled within the chosen timeframe and only displays in Door Knock mode:
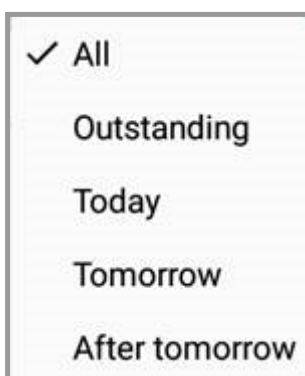
The number of properties resulting from an applied filter will show in brackets.

 This option synchronises (syncs) the data between the tablet and the Elections Office if there is an active internet connection. The date and time of the last sync is always shown at the bottom of the screen:

Last Synced: 15/07/2020 11:22:35am

 Tapping and holding the Lock button returns the device to the Home screen, locking it and encrypting any data held

  This option displays a menu of further settings including:

- Sign Out – use this to exit out of the app
- Synchronise – another option to use to Sync
- Preferences – see below
- Mode – Change mode (only available if both Door Knock and Telephone Canvass modes have been assigned to the canvasser)
- About – will give the version number of the MCA app being used
- Help – gives access to instructions to help with using MCA

Preferences option

Synchronise and security options are available and view preferences can be chosen by tapping the Preferences icon:

1. Tap the icon in the top right corner
2. Tick the synchronisation and security settings needed:
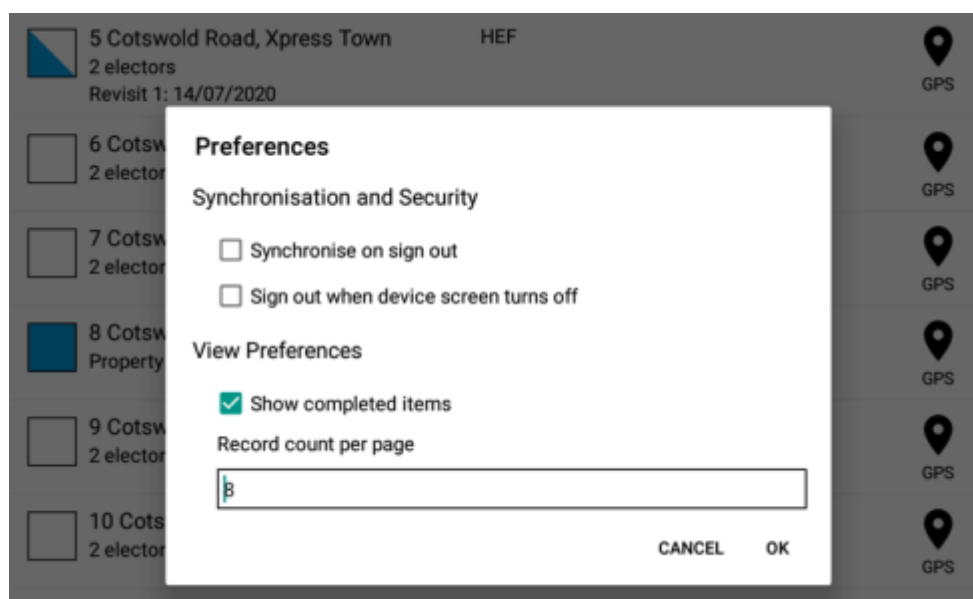
3. Either tap OK or move to View Preferences
4. Tap the box to Show completed items on screen, if this is not selected completed properties will not be shown
5. Choose how many records to display per screen
6. Tap OK. The screen shot (completed records to be shown, 8 records per screen to be displayed) results in this display:

The last page tab may contain less than the number entered.

The search option allows searching by street, property or elector name depending on the layer that is displayed, for example, if the Streets layer is displayed only street names can be searched.

Start typing in the search area and matching items will display
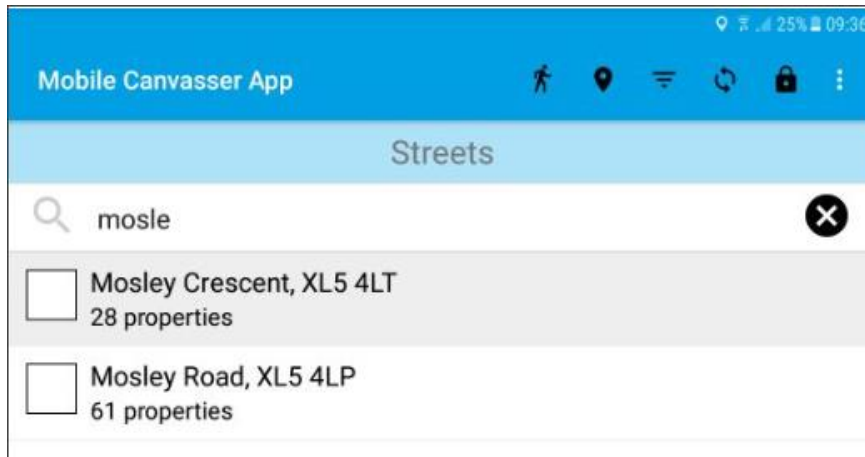
Layout

Mobile Canvasser is organised by Streets, Properties, and then Electors.

Once signed in, Streets is the default view from which property and elector layers are accessed. The Streets are listed in alphabetical order and the number of outstanding properties in each street is displayed beneath the street name.
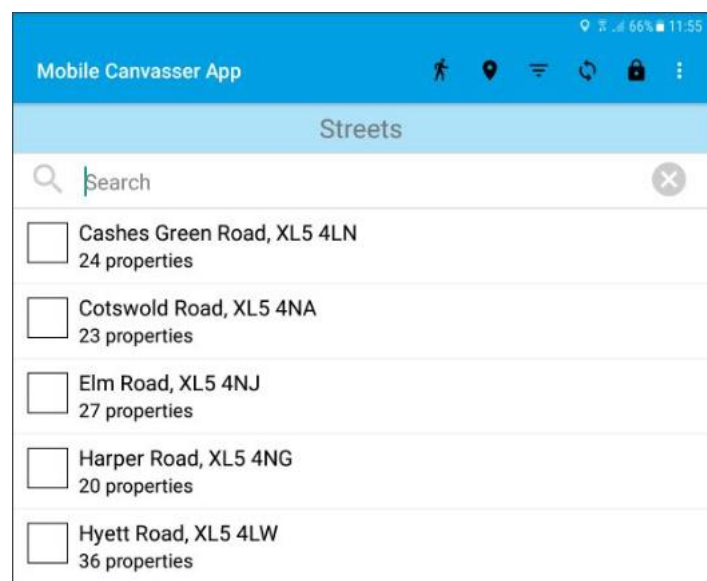
Selecting a Street will list the properties requiring a visit in that street. A square before each property gives an instant visual indication of the canvass status of the properties:

Part shaded square
Depending on the mode being used - A visit or Telephone call has been made but not completed. The property is still outstanding

No shading - Properties outstanding

Fully shaded - Property is complete (completed properties are only visible if Show Completed Items is ticked in Preferences)

Door Knock - Opening outstanding items

Tapping on a street displays the house numbers of the properties in the street requiring a visit. The number of Registered and Pending electors at each property is shown underneath each address.

The Actions column shows the form(s) outstanding:
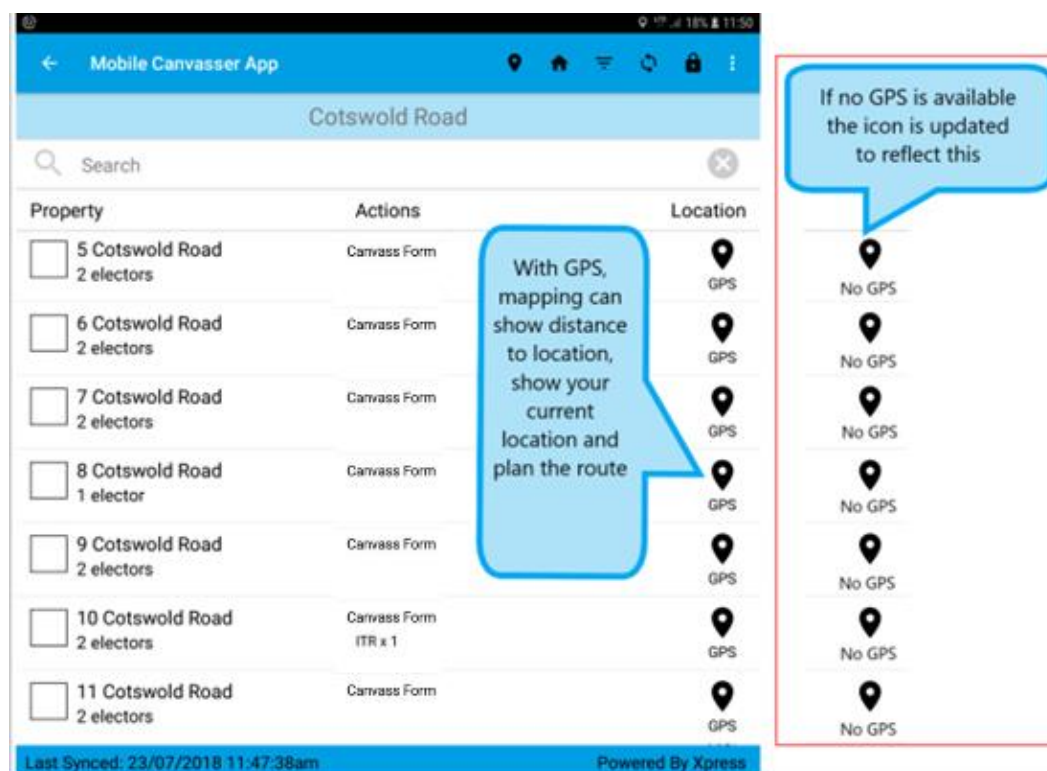
If GPS is available and the Eastings and Northings have been associated with each property by the Electoral Office, tapping the pin will open Google Maps and show the location of the property (as a red pin), and your current location (as a blue pin), on the map.

TIP

You can place your thumb and forefinger on the screen and move them together to zoom out to see more of the map. Move your thumb and forefinger further apart to zoom in further on the map.

.
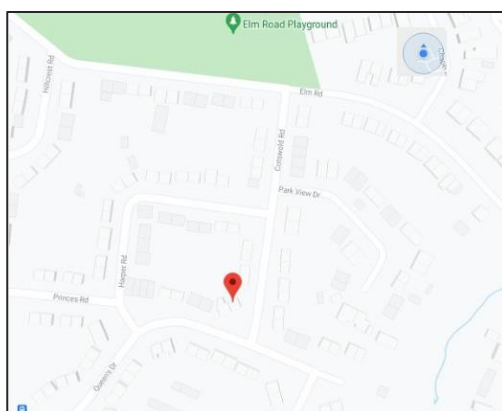
Door knock mode - updating electors

Tapping on a property displays the registered Electors and possible further actions:

Elector display

The current details of the electors are displayed; their name, register status and nationality.

Name	Nationality	Markers		
Alfred Schwager Registered elector	British	**Z**	PV	**76**
Greg Schwager Registered elector	British	Z	PV	76
Sue Webb Registered elector	British	Z	PV	76
Bethany Langston Registered elector	British	Z	**PV**	76

The Markers area gives further details as to their open register preference, if they have registered for a postal vote and if they are over 76 years old.

Black Shading

Z - box means the elector is **not on the open register or has requested not to be on the open register.**

PV - box means the elector **has an existing postal vote or has requested an application.**

76 - box means the elector **is already marked as over 76** or has advised of this.

Grey Shading

Z - box means the **elector is on the open register or has requested to be on the open register.**

PV - box means the **elector does not have an existing postal vote or has requested to cancel an absent vote.**

76 - box means the elector **is not marked as 76 or over or has advised they are younger than 76.**

In the example shown above:

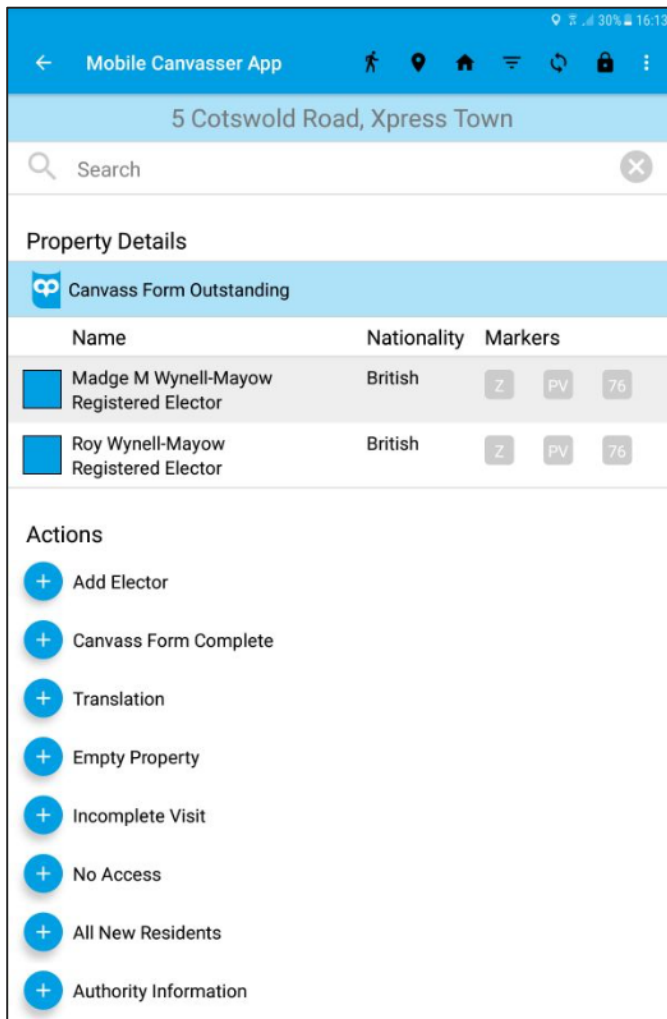Alfred is opted out of the open register and is 76 or over

Bethany has a postal vote

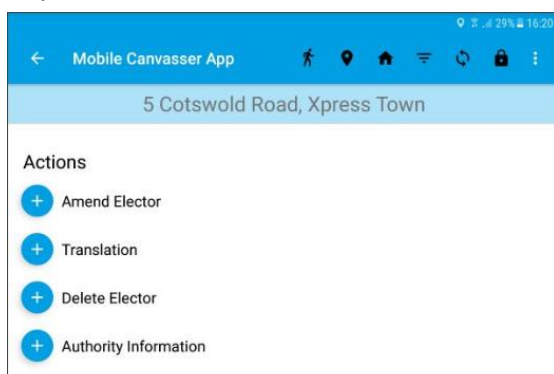Sue and Greg are both on the open register, they do not have postal votes and are both under 76.

Amending registered elector details

The elector layer allows different actions to be completed such as: amending an elector's details, taking evidence, completing an outstanding ITR application and deleting electors.

8. Tap on the property in the Street, to display the electors at the property
9. Tap on the elector name to be amended:

10. Tap Amend elector.

11. The current details for the elector are displayed. Enter any additional details or change the existing information for the elector as required.


Unsubscribe option

If an elector has unsubscribed from receiving emails, the Unsubscribed box will be checked, and an email address cannot be added.
If the elector wants to subscribe to receive emails again, un-check the Unsubscribe box and add the elector's email address.

If collecting evidence for an elector is required for the canvass visit, the type can be entered here, and further details added to the notes area.

12. Tap **SAVE**.

The Action History will display for the amended elector, with the number of items changed showing in brackets
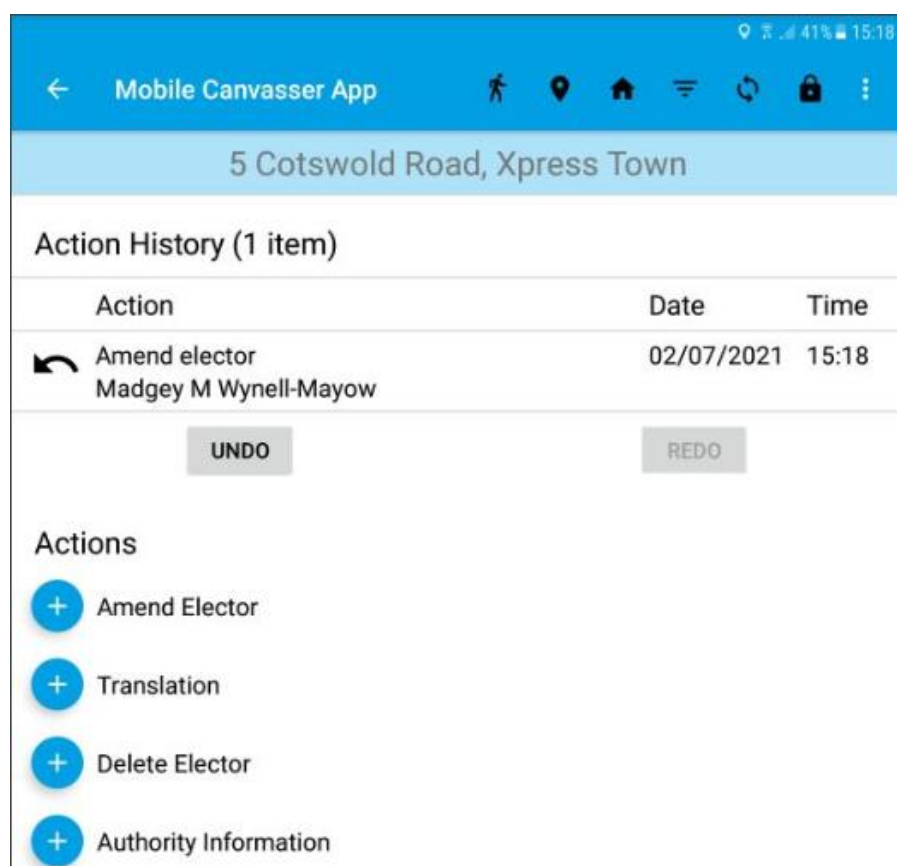
If an error has been made, the UNDO option can be used to undo each item in turn.

Once the UNDO option has been used, the REDO option becomes available to reapply the change if needed.

Other elector Actions

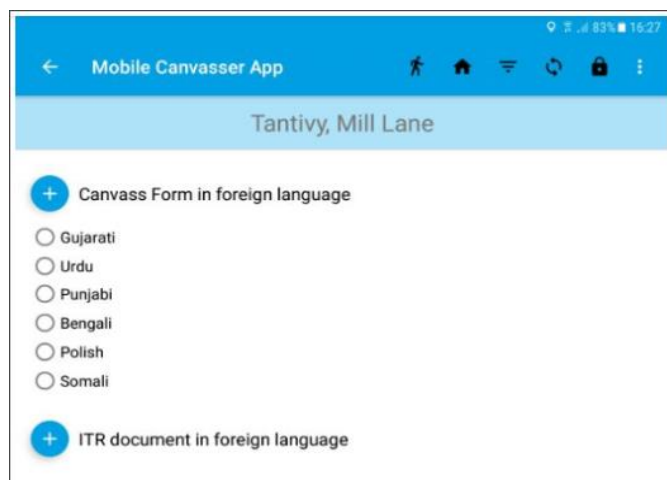As well as the Amend Elector option there are other actions listed for each elector

Translation

Many authorities have a wide demographic area where English is a second language to many electors. A Translation option is available which opens up a list of different languages:
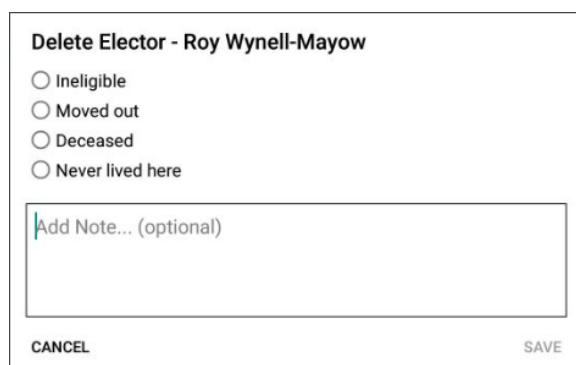

Tapping on a language option will display a note which can be read by the elector to inform them why the Canvasser is making a visit to the property.

Use the buttons at the bottom of the screen to zoom in and out for easier viewing. The reset button will return the display to the usual view setting.

Delete Elector

Use this option if the elector is no longer resident. Choose the reason and add a note if needed. Tap **SAVE**
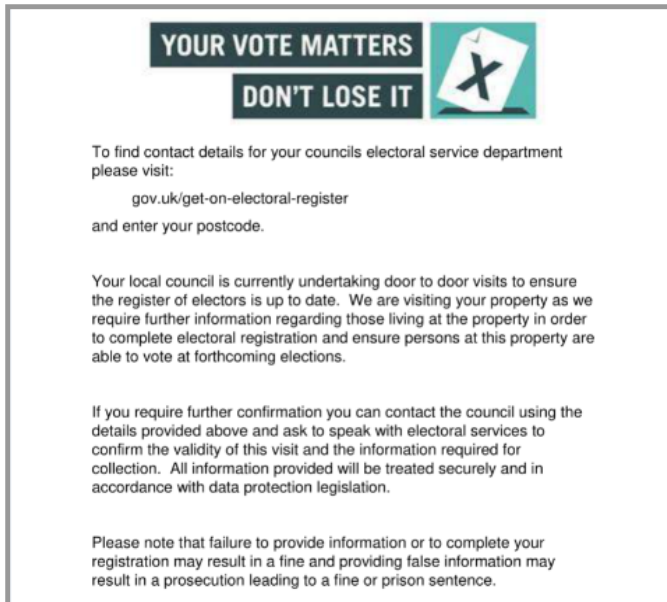
Authority information

If an elector needs reassurance that the visit is official, selecting **Authority information** action will display a note giving details about the canvass process which can be shown or read out for the elector:


Use the buttons at the bottom of the screen to zoom in and out for easier viewing, the reset button will return to the usual view setting.

Use the back arrow at the top left of the screen to return to the list of electors. Amended electors will show as amended.

Amend any other electors as required.

Return to the Property Details screen. The next step is to use the property Actions to Update the property.
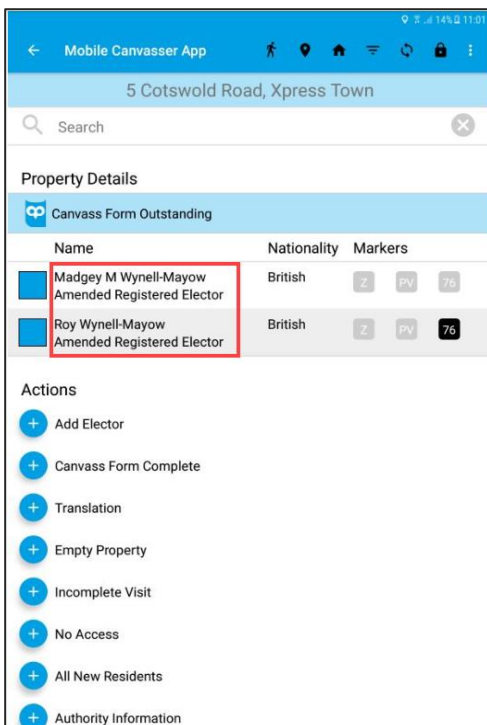
Door knock mode - updating property actions

A property is updated in the Property Detail screen. (Select a street and then a property to display the Property Details screen)

Check if there are any amendments or deletions needed for the electors already registered. If an elector's details need to be updated follow the instructions in Amending registered elector details

Add Elector

If there is a new elector at the property use this option to add their details.

The Add Elector screen opens, work through the form gathering the information required for the new elector (this is the same information that would be required on an ITR form) and enter into the tablet:

The minimum requirement here is First name and Surname. The SAVE option will not be available until these have been entered

If available, enter the new elector's Date of birth and National Insurance Number

Add their previous address details

To ensure quick registration for electors, evidence can be requested for new electors. The Evidence types are listed and can be marked as seen on the tablet and any additional notes added, for example a passport number and expiry date:

If the new elector is not available at the doorstep and cannot supply the information required (i.e. National Insurance Number or evidence), the elector's name can be added, and a paper ITR form will be sent to them to complete.

If there are more new electors at the property select **NEXT PERSON** to open a new form. When all new electors have been entered, select **SAVE** the entry is added to the Action History.

Any notes added for the elector will go into the Document History section on the elector's Vertical Editor . Syncing the data uploads it to a secure server (provided there is an active internet connection), ready to be imported directly into Register.

Canvass Form Complete

Use this option when all amendments have been made and the canvass form is complete.

An optional notes area is available for comments.

Tap **SAVE** to complete the action.

The property will show with a shaded square or will no longer be visible, depending on your View preferences.

Translation

The translation option is also available from here and will. Tap the option and select the form that needs to be completed. Select the language required and then **OPEN** at the bottom of the screen.

This can be shown to the elector to understand the reason for the visit and what is required.

Empty Property

Tapping on the Empty Property action opens a list of reasons why the property is empty:

Select the reason and add further detail as required.

Tap **SAVE**

Incomplete Visit

If a visit to a property does not result in a response, this can be recorded using the Incomplete Visit option.

There are three options

Visit made – No Contact

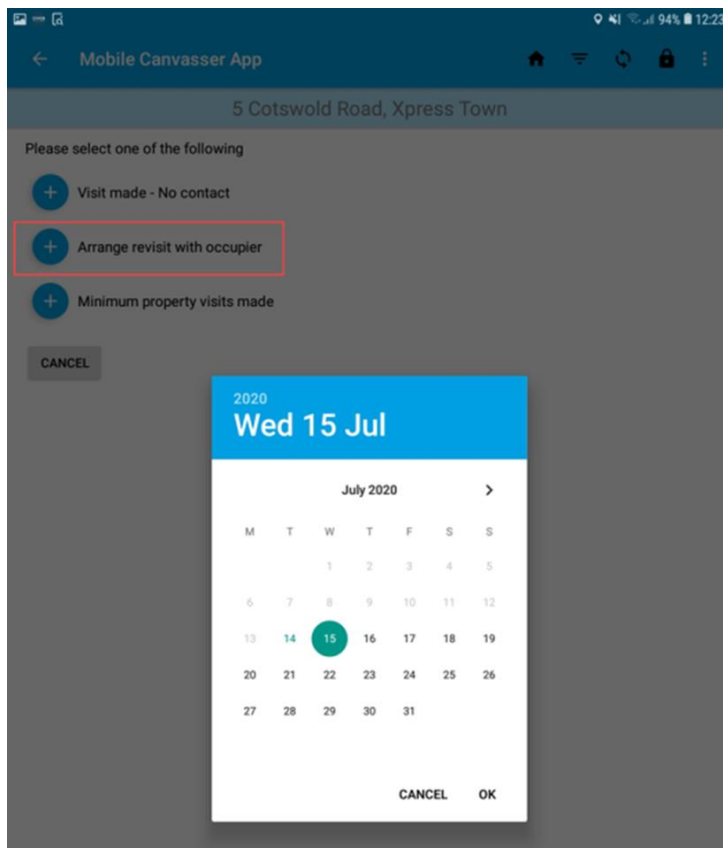Opens a Notes field for comments (optional)

Tap **SAVE**

The property will show with half shaded square showing that a visit has been made but the property is still outstanding.

Arrange re-visit with occupier

If the occupier is busy or not available, use this option to arrange a date for a further visit.

Use the calendar to select a date and tap **OK**.

The Action History screen will show the Revisit time.

The property will show in the street view with a half shaded square showing that a visit has been made but the property is still outstanding.
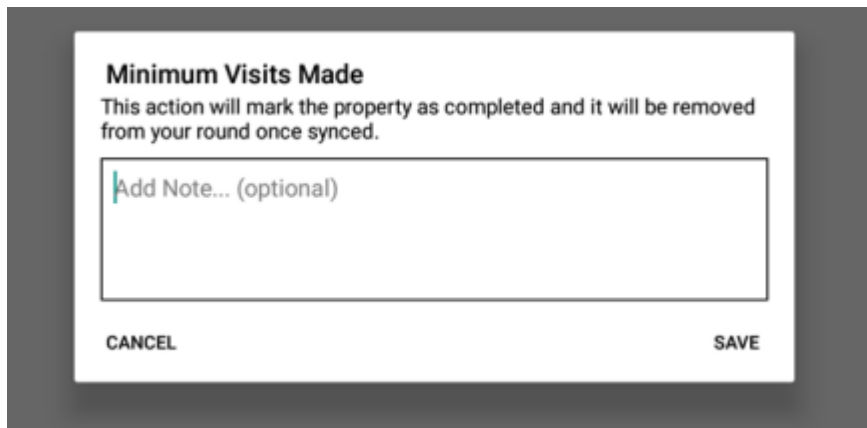
 Use the filter option to see the properties that are scheduled to be visited.

Minimum property visits made

Canvassers wishing to make additional visits over and above the minimum required can do so by using either of the first two options. Once Save has been tapped, the action will be added to the property's History. Any re-visit will appear as outstanding on the set date.

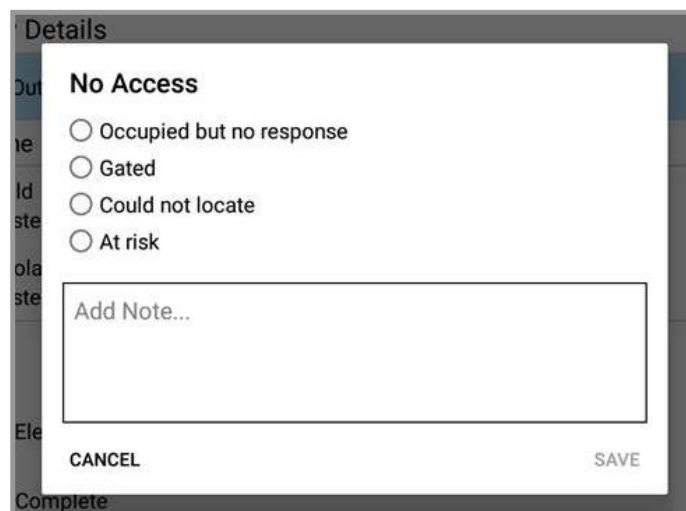If the minimum number of visits have been made and no response has been made, select this option.

An optional notes field will appear.

Tap **SAVE** and the property will be marked as completed and will be removed from the tablet at the next sync.

No Access

The No Access option brings up a List of reasons why the property could not be accessed:

Select a reason and add notes as required.

Tap **SAVE** will mark the property as completed for the Door Knock.

All new residents

Using the All New Residents option, allows you to mark the current Registered and Pending electors at a property as Deleted.
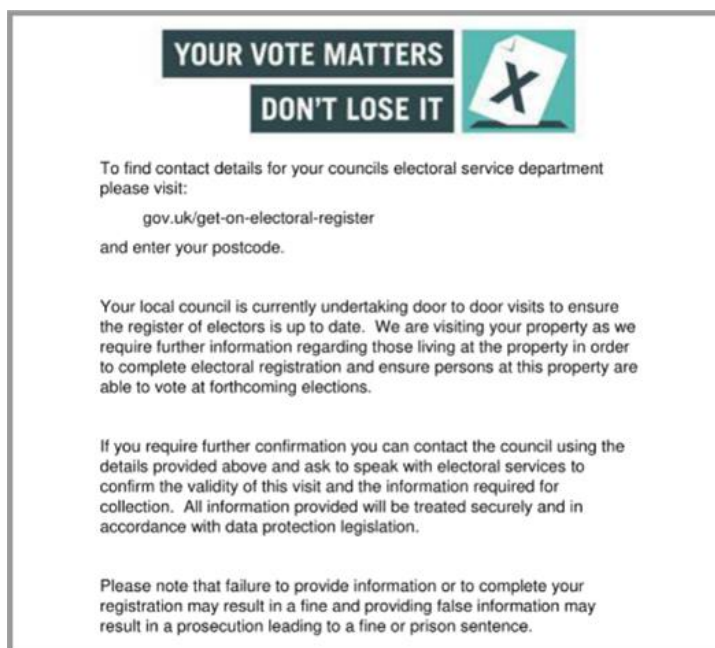
Any Pending electors are rejected.

Then use the **Add Elector** option to enter the details of the new residents.

Authority Information

If an elector needs reassurance that the visit is official, selecting **Authority information** action will display a note giving details about the canvass process which can be shown or read out for the elector:

Use the buttons at the bottom of the screen to zoom in and out for easier viewing, the reset button will return to the usual view setting.
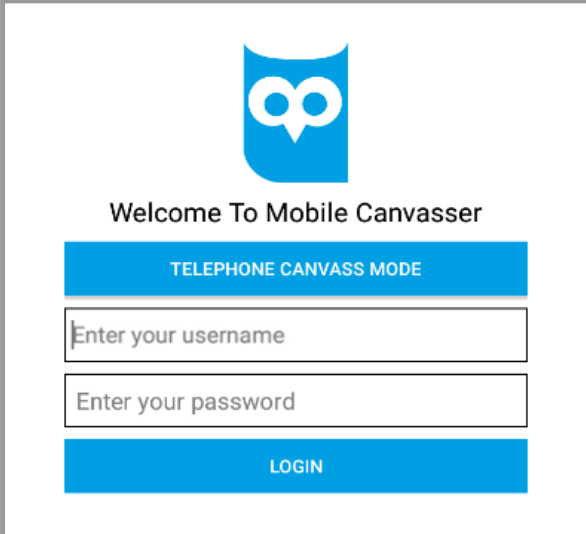
Telephone canvassing with MCA

Telephone Canvassing can be used with Mobile Canvasser for

- properties under Route 2 with electors with a matched, or overridden match status and a telephone number
- properties under Route 3. These properties will display their Responsible Person's name and contact number so the Canvasser can update details by speaking to them directly
- not including under 18-year olds (under 16-year olds for Welsh Authorities)

Canvasser login for telephone canvassing

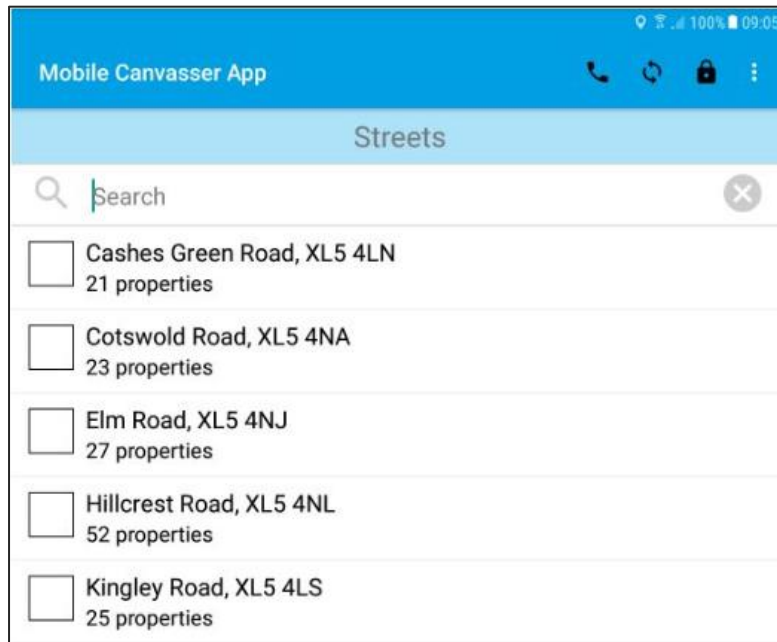Canvassers set up as Telephone Canvassers will see this login screen:

The Telephone Canvass screens are organised in Streets, Properties and Elector layers.
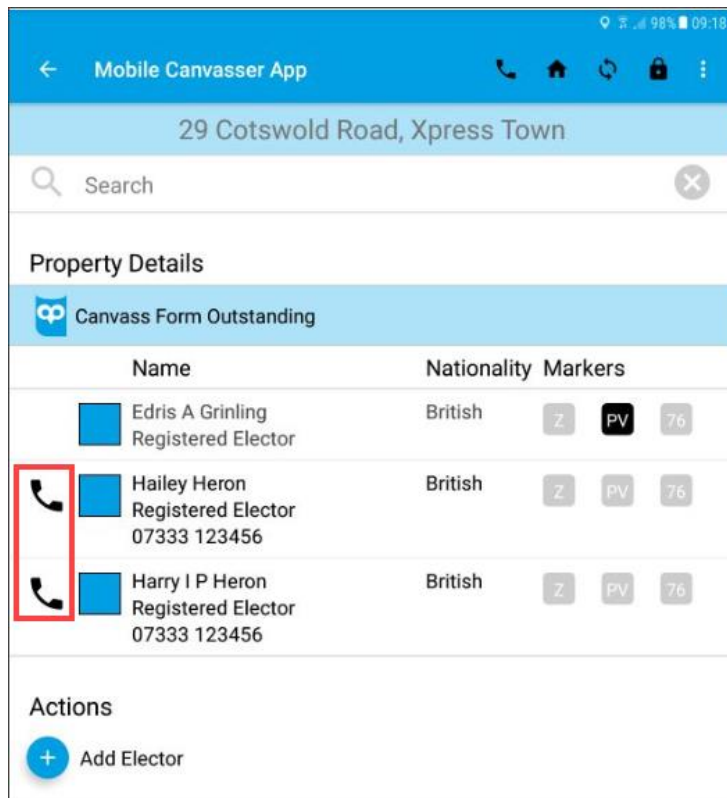
Telephone Canvass - Layout

Once logged in the Streets containing properties requiring a telephone canvass for the Canvass Area assigned to the canvasser will display:

Select a Street to view the properties requiring a telephone canvass
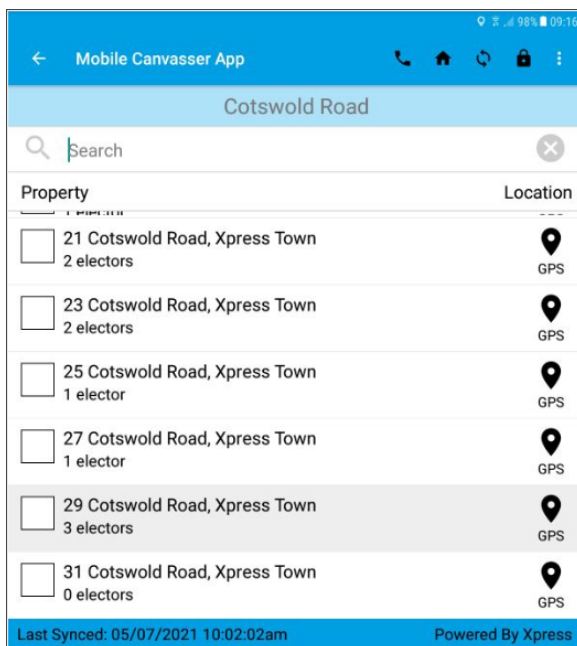
Selecting a property lists the electors together with their telephone number and email address if available:
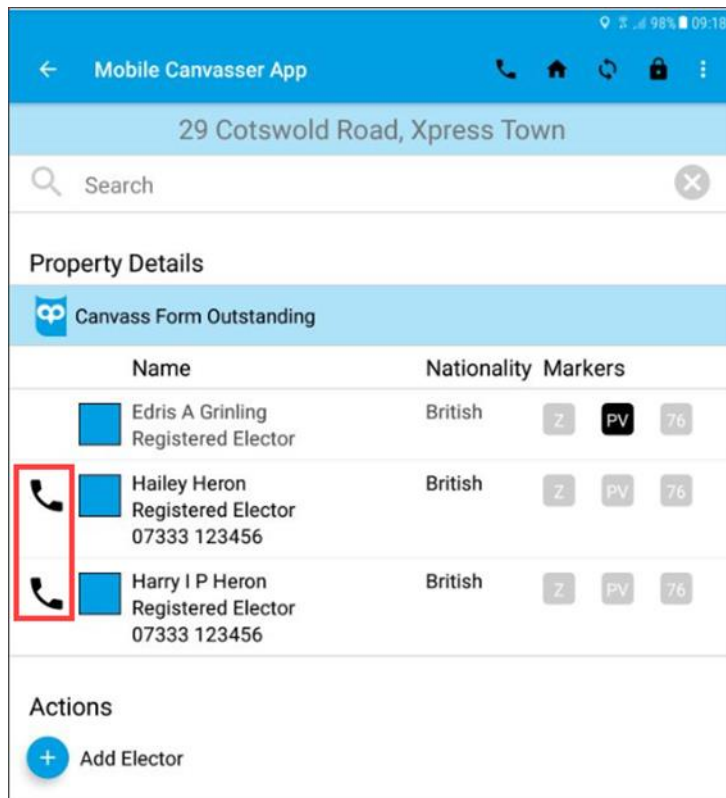
Electors available for telephone canvassing will show with a telephone symbol next to their name.

These electors have met certain criteria. Any electors who do not meet the criteria will be greyed out, these electors can be amended but are not eligible for telephone canvassing, these could be underage electors for example.

Making Calls

Calls are not made using MCA, another telephone method will be used to contact the elector. The result of the telephone calls will be recorded for each elector that has been called.

1. The Canvasser logs in using Telephone Canvass mode
2. Taps a street from their list
3. Taps a property to display the electors:

4. Taps an elector available for telephone canvassing and then taps **Call Elector**
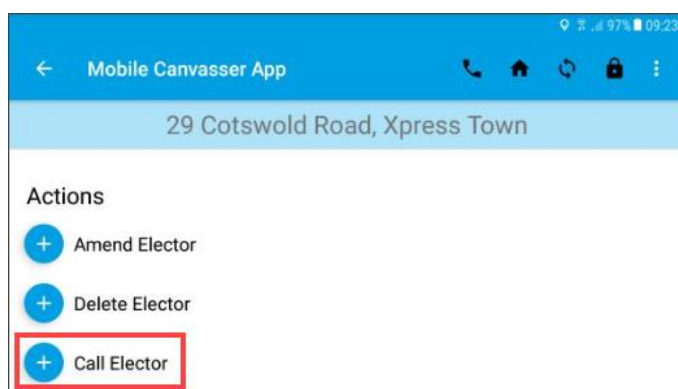
5. The elector name and telephone number are shown. Use these details to call the elector using a telephone method as instructed by your authority.

6. The available outcomes of the Call are listed, these are explained below :

- **No answer**

  If there is no answer to the call, this option can be taken. This will log the date and time the call was made and that there was no reply. The property will display with a half shaded square, indicating that a call has been made but the property is still outstanding.

- **Left Message**

  If a message was left, this option can be used, and details of the message could be added the notes area if required. The property will display with a half shaded square, indicating that a call has been made but the property is still outstanding.

- **Wrong Number**

  If the call could not connect or connected to someone unrelated to the property, the Wrong number option will remove the telephone number from the elector. The property will display either with a half shaded square, if there are other electors available to be called, or fully shaded and completed if this was the only elector at the property available for the telephone canvass.

- **No longer Resident**

  If another person answers the call and informs that the person being called is no longer resident, this option can be used.

- **Deceased**

  Use this option is you are informed the person you are trying to call is now Deceased.

- **Completed**

  If the elector confirms there are no changes, the Completed option can be selected. The property will be marked as complete and will show with a fully shaded square or will no longer be visible, depending on your View Preference settings.

The call outcome selected will be recorded in the Action History for the elector. This information will be available if the elector needs to be called again.
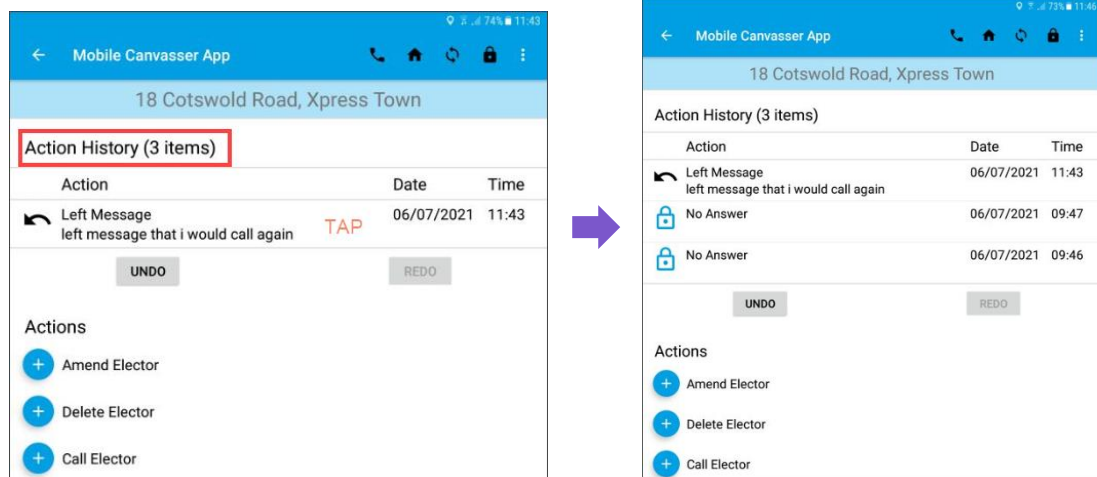
To see all 3 Action History items, tap anywhere on the line of the last action and the previous actions will display.

7. Canvassers will call each elector available for telephone canvassing at the property until the property can be marked as Completed.

Amending Electors

Some properties will require amendments to electors before they can be marked as completed, such as updating the details of existing electors or adding new electors or removing those who have left.

1. If the elector being called or any of the other electors at the property need to be amended select **CANCEL** from the call screen.

2. An Amend Elector option is available for the elector being called.

3. If amendments need to be made for another elector at the property, select the back button and select the relevant elector from the list and then select Amend Elector.

4. Selecting the Amend Elector option will open the elector's details ready for the amendments

Edit Elector

Title (optional)

Hailey

Middle name(s)

Heron

Nationality

British ▾

DD/MM/YYYY

National insurance number

Email address

☐ Unsubscribed

07333 123456

☐ Postal voter
☐ Exclude from the Open Register
☐ Aged 76 or over

Previous address

Previous address 1

Previous address 2

Previous address 3

Previous address 4

Previous address 5

Previous address postcode

Evidence (Please select one)

◉ None
○ Passport
○ Biometric Residence Permit
○ EEA Identity Card
○ Photo Driving License
○ Northern Ireland Electoral ID Card

Notes

Enter notes (Optional)

Names and Nationality changes can be made by overtyping the existing information

Unsubscribed – if ticked an email address cannot be entered

If the elector wants to receive emails again remove the tick and add the email address

Use tick boxes to set or unset the status for
Postal voting
Exclude from open register
Aged 76 or over

5. When all amendments have been made tap **SAVE** at the bottom of the screen.

6. If this is the last action for the property tap back on the elector who is giving the information and select **Call Elector** and then select **Completed**.

Add Elector

If there are new electors at the property these can be added from the Property Details screen

1. On the Property Details screen tap the **Add Elector** option

2. This will open a form to be completed with the new elector's details.

The minimum requirement here is First name and Surname. The SAVE option will not be available until these have been entered

If available, enter the new elector's Date of birth and National Insurance Number

Add their previous address details

3. If all details are not available, the elector will receive an ITR form to complete through the post.
4. When all the available details have been added tap **SAVE**, if there are more new electors tap **NEXT PERSON** to open another form to add the elector's details. Select **SAVE** when all new electors have been added.

5. The Action History will show the added elector(s) and the elector(s) are added to the elector list.

6. If all amendments and additions have been made, return to the Property Details screen and select the elector giving the information
7. Then select Call Elector and select the Completed if all information is updated and correct.

Delete Elector

If electors have moved out of the property or are now deceased, or there has been a clerical error and they are duplicated on the register, use the Delete Elector option.

1. From the property details screen, select the elector to be removed
2. Tap the Delete Elector option

3. Select the reason for the deletion and add notes if required:

4. Tap **SAVE.** The Action history will display

5. Use the back button to return to the Property Details Screen

6. The elector will show as deleted in the list.

7. If this is the last amendment to be made to the property. Select the elector who is giving the information and then tap **Call Elector** and then select **Completed.**

8. Depending on your View Preference the property will display with a fully shaded square indicating the property is complete (this will be removed on the next sync) or the property will be removed from the property list straight away.

9. After syncing, the number of properties showing as outstanding against a street reduces by the number of completed properties, so the Canvasser can always see the Streets and Properties still left to be called.

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