



Campaign Services Front Counter Guide

***Revised October 2023**

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I. Introduction

Welcome to the Campaign Services division of the San Francisco Department of Elections !

Each division within the Department maintains responsibility for specific processes. The Campaign Services division is responsible for providing information about and facilitating candidate filings, initiative measures, and changes to individuals' voter registration.

Campaign Services is the first point of contact for office visitors and is responsible for a great deal of general administrative office work: answering the main phone line, responding to SF Vote email inquiries, handling USPS mail, processing customer transactions (we sell copies of the citywide and district maps for example), conducting basic data entry for campaign finance filings, and other functions that are not exclusive to elections related workplaces.

As each election cycle ramps up and our processes shift accordingly, you will be asked to assist with duties for other divisions, including the following: processing of provisional ballots, Ballot Distribution tasks, signature verification, COVR processing and more.

The pages that follow will outline several of our division's processes and functions and will assist you in gaining a general understanding of division responsibilities and expectations.

**San Francisco Department of Elections
1 Dr. Carlton B. Goodlett Pl, Rm 48
San Francisco, CA 94102
(415) 554-4375**

Office hours: Monday - Friday, 8 a.m. - 5 p.m.

II. Personnel Expectations

A. Schedule

1. The Department of Elections office is open **Monday - Friday, 8 a.m. - 5 p.m.** You are expected to arrive in time to open the office by 8 a.m. In the event you are running late, please call, text or email your manager to indicate accordingly.
2. Punctuality is important for many reasons – it demonstrates mutual respect toward your colleagues which is imperative to the success of our division and the Department. It is understood that sometimes unforeseen circumstance such as transit delays can complicate the morning commute. There is no punitive effect for running late randomly; however, chronic tardiness is unacceptable.
3. All employees are entitled to two 15 minute breaks each day – one in the morning and one in the afternoon. All employees are entitled to a one hour lunch break. Lunch and break times are not scheduled ahead of time in order to provide flexibility. Management reserves the right to assign break times to ensure adequate front desk coverage during busy peaks.
4. In the weeks surrounding Election Day, our shifts will adjust to extended office hours. Personnel are expected to maintain availability the two weekends before and after Election Day. On Election Day, personnel are expected to work an extended shift, approximately **6 a.m. - 9 p.m.**
5. Please submit leave requests in writing to the division manager as soon as possible so as to avoid potential time conflicts. Add your approved absences to the division calendar located by the mailboxes.

B. Dress Code

Campaign Services division has a high level of public interaction. You may find yourself assisting elected officials, judges, legislative aides, voters, observers, reporters and other public figures. The nature of our interactions and the profile of our division dictate a dress code that is slightly more formal than other divisions within the Department. Individuality and conformance to this code are not mutually exclusive endeavors. Cost is not indicative of acceptability. Adherence to standards set forth is not intended to burden staff, but, rather, demonstrate professional decorum.

We request that you dress yourself in professional office-appropriate attire.

Because the Department of Elections is a neutral, non-partisan entity, you may not wear any political clothing, buttons or accessories.

C. Timesheets

It is your responsibility to complete your timesheet every week (Admin will send a link every Friday morning). Timesheets are due by noon every Friday. If you qualify for bilingual pay it will be your responsibility to log bilingual hours on your timesheet.

D. Customer Service Standards

During your time with Campaign Services, you will likely handle the greatest amount of face to face interactions with customers, field the most phone calls in the Department, and will be responsible for responding to a large volume of emails. We pride ourselves on providing excellent customer service.

You will encounter impatient customers – people who are unwilling to afford us the respect we provide them or happen to be dealing with their own overwhelming life circumstances. Department personnel are expected to interact with all customers in a respectful and courteous manner. This does not suggest that verbal abuse or hostility toward Department personnel is tolerable; however, personnel are not to engage our clients in an antagonistic or negative manner.

In the event that you have a difficult customer who is unaccepting of your service, please escalate the situation to your supervisor. Alternately, you are encouraged to offer the person a comment form. If the individual is upset about a process or procedure and if it is relevant to our processes and operations, their feedback may be useful to the Department.

If you do not have an answer for customer inquiries, politely inform them that you will need to confirm information or gain clarification. Never speculate or guess when responding to Elections-related inquiries. It is very important that the information we communicate about Department related processes is accurate and correct.

III. General Office Tasks

A. Phones



1. **VOICEMAIL**
 - a. dial ext. **45959**
 - b. when prompted, enter **44390 #**
 - c. password – **94102 #**

Voicemail is checked every morning. This is a time sensitive task, especially if someone called out sick the night before or early that morning so we are able to convey this to management as soon as possible. If there are any unchecked voicemail messages, a red light will show on the front counter phones.

*****After checking voicemail messages and recording caller contact information, please delete the messages !***

2. **ACTIVATE PHONE LINE**

At the beginning of each day we activate the phone lines by pressing the “**Send Calls**” button on the front left phone so that the indicator light is OFF. At the end of the day, we deactivate the phone line by pressing the “Send Calls” button so that the indicator light turns ON.

3. **INCOMING CALLS**

When answering incoming calls, greet the caller in a professional manner and indicate they have reached the San Francisco Department of Elections.

4. **OUTGOING CALLS**
 - a. dial **9** (to call outside the building)
 - b. dial **1** (U.S. country code)
 - c. dial area code (e.g. **415**)
 - d. dial the remaining 7 digits (e.g. **555-5555**)

The phones placed directly on the front counter do not possess long distance capabilities (415 and 628 only). If you need to contact a voter with a non-San Francisco area code, you will need to utilize another phone.

5. **TAKING MESSAGES**

If you are unable to assist a caller with their inquiry or request, and your supervisor is away from their desk, ask to take a message. Obtain the caller’s contact information (name, phone number, email) and let them know your supervisor will be in touch shortly. Send an email to your supervisor with the caller’s contact information, the time they called and a brief description of their inquiry.

6. **TRANSFER CALL**
 - a. while caller is still on the line, press **TRNSFR**
 - b. dial the extension (the last 5 digits of the full phone number)
*Example: (4 1 5) 5 5 **4 - 4 3 7 5***
 - c. press **TRNSFR** again
 - d. hang up

***** only CS manager phones may transfer calls to the Director***

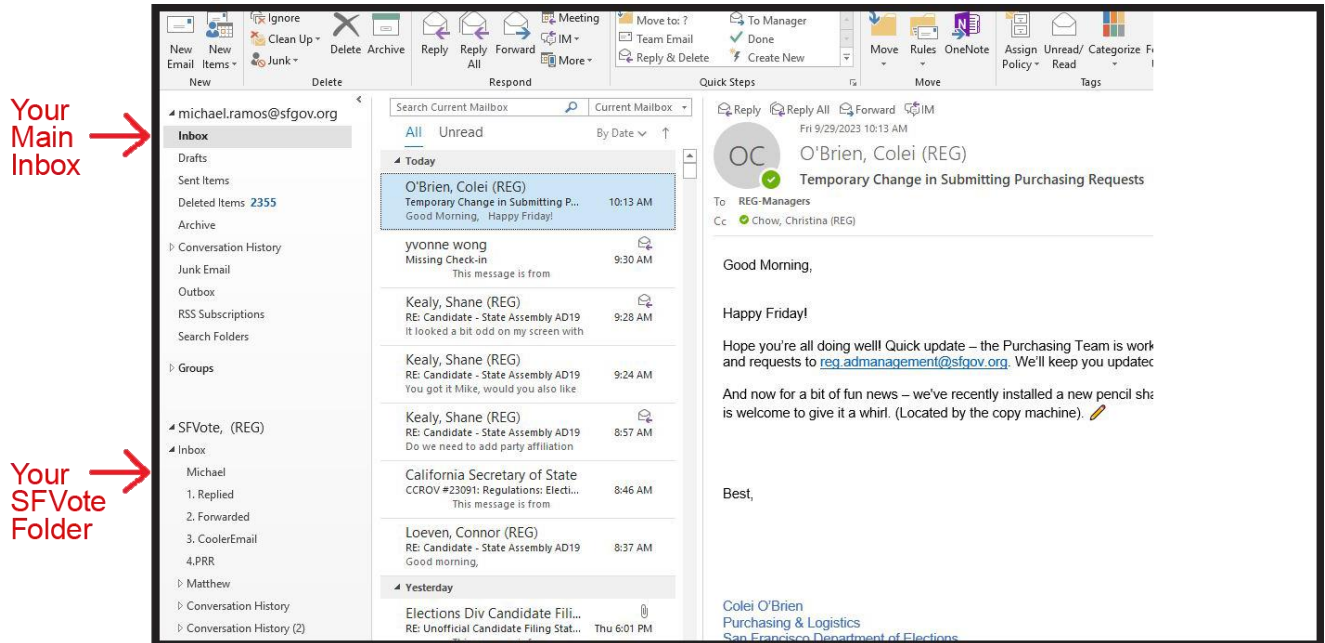
7. **MEDIA**

ALL media inquiries will be handled by **Director John Arntz** or **Matthew Selby**, Manager of Campaign Services division. As soon as a caller or in-person visitor identifies themselves as a media representative, that is your queue to politely inform them that you will transfer them to one of the authorized individuals (Matthew Selby or Director Arntz).

- a. DO NOT engage in conversation with media representatives.
- b. DO NOT speculate about Election results or processes.
- c. DO NOT offer your opinions.

B. Email

The bulk of Department correspondence – both internal and external – occurs via email. The email management program used by Department personnel is Microsoft Outlook. You will be assigned a Department email address during onboarding. Please refrain from engaging in non-Department related activities while using the Department email system. All Department emails are considered public documents and can be requested by interested parties per the city's Sunshine Ordinance.



1. Main Inbox

This is where you will receive correspondence that is directly addressed to you. Please take the time to create a professional Department signature that you will use to close all of your email messages.

2. SFVote Folder

The Department's main inbox receives messages via SFVote@sfgov.org

Your 2nd inbox is a subfolder of SFVote. The bulk of messages to this inbox involve Voter Registration updates (change of address, record cancellation etc.) Your supervisor will assign you messages to respond to as they are received.

3. Calendar

Outlook has a built-in calendar. Meetings and training invitations will often be added to your calendar once you accept the invite. If you have questions about how to use Outlook's calendar feature, please consult your supervisor.

C. Public Inquiry Tracking Application (PITA)

This web-based app is maintained by the Department and is used to route tasks from one division to another. For example, your supervisor assigns you correspondence sent to SFVote. The sender is a voter submitting an update form. You will download and save the attached files

(see **Appendix B for detailed instructions**), and will use PITA to send the file to the appropriate division for processing.

D. USPS Mail

1. Voter Records Division is responsible for processing mail; however, mail is often delivered to the front desk, to the USPS locker in the hallway, and to the mailbox in the Mail Room.
2. Most voter forms may be left in the Voter Records mailbox near the front desk.
3. A lot of mail will be addressed to “The Director of Elections” because our director’s name is on all Department correspondence; however, most of these envelopes contain voter forms that will be routed to Voter Records division for processing. **Please date stamp ALL mail as soon as it crosses the counter.**
4. If you are unsure about whom mail should be routed to, please ask a colleague for guidance. Do not open packages if you are unsure of their destination. If a carrier is trying to deliver a package or request that you sign for one, please confirm that it is actually intended for this address (Room 48).
4. The outgoing mailbox is located in our division’s area and is placed. Several times each day, Campaign Services personnel will bring the outgoing mail to the Mail Room (code **1-7-5-0**) and leave in the white USPS bin near the door.
5. The Department mailbox within the Mail Room is located on the wall to the right as you enter to the mailroom.

E. Public Comment Forms

1. Comment forms are located in the cabinet under front counter. Each form includes information in English, Chinese, Spanish, and Filipino.
2. If you have a customer that is upset and wishes to formally express their displeasure about any matter you may direct them to complete this form.
3. Upon completion of the form please date stamp, copy (retain original, give copy to customer) and then scan the document for digital retention.
4. Management will review correspondence and follow up accordingly when necessary.

F. Observable Activities

The San Francisco Department of Elections strives to provide equitable access to voting and election-related services and to conduct free, fair, and functional elections for the City and County of San Francisco. The Department must comply with all applicable federal, state, and local laws, as well as any election-related regulations issued by the California Secretary of State. Serving over 500,000 registered voters, the Department makes a concerted effort to operate in an open and transparent manner in order to inspire public confidence in the integrity of elections in San Francisco. The Department invites interested members of the public to observe elections processes in the context of safeguarding voting system security and preserving voter privacy.

1. Each election cycle Campaign Services division is required to host an Elections Observer Panel. The application will be available on the Department website.
2. State law requires us to develop a calendar of observable activities prior to each election.
3. Observers will be issued the Department’s Guide to Observing Elections Processes to help familiarize election observers with their rights and responsibilities, as prescribed by California

Secretary of State guidance and various provisions in the California Elections Code. It also includes a schedule of activities, observable both in person and via the Department website: sf.gov/election-observation

4. Campaigns are welcome to observe the Signature Verification for petitions.
5. All observers are asked to sign in and wear Department-issued ID badges.

F. Filing and Records Retention

Campaign Services typically maintains two sets of records – one containing confidential information and another with confidential information redacted. The Campaign Services division is responsible for maintaining the following records:

1. Candidate filings for local offices
2. Candidate filings for state and federal offices that are filed with our office
3. Ballot measure filings & ballot argument filings
4. Master Voter File Applications
5. FPPC filings (campaign finance records)
6. Election Observer Panel applications
7. General correspondence

G. Confidential vs Non-Confidential

The provisions for Confidential and Non-Confidential information are applicable not only to our records, but also our in-person interactions at the counter, over the phone and via email.

For example, I could tell someone that “Person A” is registered in SF, that they were born on 2/12/1985, and that they are a member of the Green Party, but I cannot reveal where they live or in which Precinct they vote.

Original candidate and ballot measure documents with confidential information are filed in the black, two drawer metal cabinet located in the middle of the Campaign Services area. Archival documents are located in the cabinets in the hallway behind the Campaign Services area.

Please scan all documents for retention of the confidential document. A redacted (non-confidential) version will also be saved.

Once you have digitally redacted the confidential information, a physical copy must be printed and stored in the public file drawers (located in our lobby area). These documents may be examined by members of the public, journalists and candidates. If our team scans, copies and places files in the appropriate places as soon as they enter our possession, it allows us to ensure complete and thorough files for public consumption.

A copy machine is available in the event any examiners would like to create a copy of a file to take home (copies cost \$0.10 / page). It is not uncommon for popular files in the public drawer to go missing; sometimes folks walk off with them inadvertently. In the event an examiner declares that “something is missing” you may simply take the hard copy from the drawer and compare it against the digital iteration you have scanned to ensure all proper elements of the file are present.

CONFIDENTIAL	NON-CONFIDENTIAL
Street Address / Mailing Address	Name
Phone Number / Email	City of Registration
Signature	Date of Birth / Place of Birth
Precinct Number	Party Affiliation
Occupation	Date of Registration
Language Preference	Voter History
Prior Reg. Info shown on the Affidavit of Registration	Registration Status (Active / Inactive / Pending / Cancelled)
Any identifying information of a minor (under 18 years old)	CAEC §2194 CA Gov. Code §6254.4 (HAVA) (42 U.S.C. §15482)
Voter History Voting Method	
Driver's License / ID / Social Security or other unique identifier used by the state of CA (Voter ID / HAVA ID)	

H. Voter Information Pamphlet Archive

The Voter Information Pamphlet (VIP) is the booklet containing information about local measures and candidates. The Voter Information Guide (VIG) is the booklet printed by the state with information about statewide measures and candidates. Campaign Services maintains the physical archive of historical VIPs and VIGs. Every election cycle, two copies of each booklet (multiplied by the number of different ballot types and languages) are pulled from inventory, placed in envelopes, labeled and filed in the appropriate cabinet. Some of these cabinets are located in the back hallway; others are located in Brooks Hall. The San Francisco Public Library's Government Information Center maintains a digital archive of VIPs that are available to the public for viewing, downloading, and printing.

IV. Master Voter File (MVF), Vote-By-Mail File (VBM), Public Terminal, and Public Information Requests

A. **Master Voter File**

The Master Voter File (MVF) is a large document that contains the entire San Francisco voter roll. This document contains Confidential information, which means requestors must demonstrate eligibility under permissible uses, complete an Application for Voter Registration Information, and provide necessary supplemental documents:

https://sf.gov/sites/default/files/2023-05/2023_AppforVoterRegInfo_Fillable.pdf

The Master Voter File is updated every month and can be found here:

O:\All\Campaign Services\MVF

Per the city's Sunshine Ordinance, we do NOT charge for requested data. However, if an approved requestor requests the data be provided in physical format, we only charge to cover the cost of the physical media – \$0.75 for a CD-R, and \$5.00 for a Department-issued, encrypted USB drive. Per City & County Cyber Security policy, we cannot use requestor-provided discs or USB drives as these present potential security risks. Sending the file via SF SecureShare (email) incurs no charge.

If you receive a formal request for the Master Voter File, please forward it to or bring it to the attention of your supervisor immediately.

B. **Vote-By-Mail File**

The Vote-By-Mail (VBM) File is a document that is updated daily, starting 29 days before every Election Day. This file includes the information for every voter who has requested to receive a ballot by mail and indicates whether or not they have returned their ballot. Campaigns use this file to target their mailings to voter who have not yet voted. Requestors must demonstrate eligibility under permissible uses, complete an Application for Voter Registration Information, and provide necessary supplemental documents:

https://sf.gov/sites/default/files/2023-05/2023_AppforVoterRegInfo_Fillable.pdf

The Vote-By-Mail file can be found here:

O:\All\Campaign Services\VBM Envelopes

Per the city's Sunshine Ordinance, we do NOT charge for requested data. However, if an approved requestor requests the data be provided in physical format, we only charge to cover the cost of the physical media – \$0.75 for a CD-R, and \$5.00 for a Department-issued, encrypted USB drive. Per City & County Cyber Security policy, we cannot use requestor-provided discs or USB drives as these present potential security risks. Sending the file via SF SecureShare (email) incurs no charge.

If you receive a formal request for the Vote-By-Mail File, please forward it to or bring it to the attention of your supervisor immediately.

C. Public Terminals

The **Public Terminals** are the desktop computers located in the lobby area of the Campaign Services division. These computers have web-based access to the EIMS database and may be utilized by approved users to conduct queries within the voter roll. Public terminal users must demonstrate eligibility under permissible uses, complete an [Application for Voter Registration Information](https://sf.gov/sites/default/files/2023-05/2023_AppforVoterRegInfo_Fillable.pdf), and provide necessary supplemental documents:

https://sf.gov/sites/default/files/2023-05/2023_AppforVoterRegInfo_Fillable.pdf

If you receive a formal request for Public Terminal Access, please forward it to or bring it to the attention of your supervisor immediately.

D. Public Records Requests

The Department regularly receives requests for public records pertaining to candidates, ballot measures, campaign finances, correspondence etc. Per San Francisco's Sunshine Ordinance, the Department must provide the requested documents if the Department possesses them as long as Elections Code and or other laws and regulations do not prohibit it. Depending on the requestor and the nature of the request, confidential information may need to be redacted.

If you receive a formal request for the Public Records, please forward it to or bring it to the attention of your supervisor immediately.

V. Point of Sale

Campaign Services are the primary users of the Department cash register, processing transactions for maps, Certificates of Registration, candidate and campaign filing fees. Sales reports are generated every Monday morning and provided to Colei O'Brien (Purchasing & Logistics Coordinator) for processing. For instructions, detailing how to generate sales reports, please refer to **Appendix C**. For instructions, detailing how to generate a Certificate of Registration, please refer to **Appendix D**.

VI. Registration Updates

Voters may request changes or updates to their voter registration record. Some changes may be requested via the Voter Portal on the Department website. Other changes require a handwritten signature on a Department-issued form. Blank copies of these forms are filed in the black cabinet underneath the front counter. These are some of the most commonly issued forms:

1. Voter Registration Card (VRC)

This form is issued to individuals who wish to register (or pre-register) for the first time as well as requesting certain registration updates:

- a. Name change (unless this is due to a DOE data entry error)
- b. Change of Party Preference
- c. Submitting a new signature

2. Registration Update Form

- a. address updates (domestic only)
- b. contact information (phone, email)
- c. paper VIP opt-out
- d. language preference

3. **Cancellation form** – to request cancelling SF voter registration
4. **FPCA (Federal Post Card Application)**
 - a. voters who will be overseas but wish to participate in San Francisco elections
 - b. if the voter moves back to the U.S., they will need to re-register as a domestic voter
5. **Deceased Notification** – to notify the Department of a deceased voter
6. **Third Party Notification** – to notify the Department that a voter who does not live at a particular address is receiving correspondence from the Department. This form begins the process of removing the voter in question from our records.
7. **VRC Statement of Distribution** – if an individual requests 25 or more Voter Registration Cards (VRCs), they are required to complete this form.
8. **Replacement Ballot form** – in person requests to exchange or replace their ballot

VII. Proof of Registration

Any time an update or change is made to a voter's record (change of address, party preference etc.) a new Voter Notification Card (beige postcard) is printed off site and mailed to the voter. This serves as Proof of Registration. Voters are not required to present this document when voting; however, other agencies, USPS for example, will accept it as proof of residency when an individual files to open a P.O. Box.

A. **Voter Notification Card** (beige postcard)

Below is an image of a blank Voter Notification Card. When it is sent to a voter, it will auto-fill the fields on the left with the voter's information.

This document typically takes **1 - 2 weeks** to arrive in the mail from the time the request is placed and is provided to the voter free of charge.

Department of Elections
1 Dr. Carlton B. Goodlett Place
City Hall, Room 48
San Francisco, CA 94102-4634
sfelections.org
(415) 554-4375

Party Preference:
政黨偏好
Preferencia de Partido
Kinakausapang Partido

Precinct:
選區
Distrito Electoral
Presinto

Voter ID:
選民身份號碼
Número de Identificación Electoral
ID ng Botante

San Francisco County

Registration Date:
登記日期
Fecha de Inscripción
Petsa ng Rehihiyasyon

Registration Number:
登記號碼
Número de Inscripción
Numero ng Rehihiyasyon

OFFICIAL ELECTION MAIL
Authorized by the U.S. Postal Service

RETURN SERVICE REQUESTED

Rev 8/19

B. Certificate of Registration (white sheet of paper)

If the voter needs proof of registration sooner than the length of time it takes for a postcard to reach their address, we are able to print a Certificate of Registration on demand for **\$1.50** (no tax). This serves the same purpose as a VNC. Below is an image of a Certificate of Registration. For detailed instructions for printing Certificates of Registration, please refer to **Appendix D** of this guide.

Note: *this document must be executed in person in our office because it requires both the voter and Department personnel to sign the form !*

CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF ELECTIONS
1 Dr. Carlton B. Goodlett Place, Room 48
San Francisco, CA. 94102 (415) 554-4375

JOHN ARNTZ
DIRECTOR OF ELECTIONS

This certificate of registration verifies the voter registration status of the person named below. It has been provided in lieu of a photocopy of the Affidavit of Registration and is evidence of citizenship for voting purposes only (California Election code 2112). Additional documentation may be necessary if used for proof of citizenship when traveling outside the United States. You may want to contact the foreign country's governmental tourism office or consult your travel agent.

I, John Arntz, Director of Elections for the City & County of San Francisco, hereby certify that the information below is true and correct data from the voter's registration affidavit on the Voter Registry of San Francisco. Witness my hand and seal on this day of September 08, 2023.

State of California
City & County of San Francisco

By: _____
Name: _____ Deputy

Certificate of Registration

Name: _____ Affidavit Number: _____
Address: _____ Original Registration Date: _____

Party: _____ Party Preference
Birthplace: CA
Birthdate: _____

Signature: _____

VIII. Fair Political Practice Commission (FPPC Filings)

Our Department serves as a filing agent for some, but not all of the County's FPPC filing. We handle FPPC filings for all local candidate races, slate mailers, ballot measure committees and miscellaneous filings. These documents all have a similar format with a number indicating what type of filing they are. Oftentimes there is a statutory deadline for a certain type of filing, as such you will notice an abundance of these forms arriving at our office around the same time.

As soon as the forms arrive in our office please:

1. Date stamp all copies of forms immediately
2. Scan one copy of each form for digital retention
3. Enter forms into the Microsoft Access database
4. File the physical copies (just like candidate files and ballot measures – one confidential iteration that can go in cabinets in back hallway, one public one in the lobby cabinets)

5. For local candidate FPPC filings, you will want to create a redacted iteration of the document and place it in the appropriate file cabinet within the public viewing area.

The Ethics Commission also serves as a filing officer for FPPC forms, oftentimes if a form is not found in our office it may be found with Ethics. They have a website where filings are displayed, if you have a customer seeking a document that we are not in possession of, you may refer them to this site or look at it for them to see if the missing document is accounted for therein.

SF Ethics Commission
25 Van Ness Avenue, #220
San Francisco, Ca 94102
(415) 252-3100
sfethics.org

IX. Other Resources

A. Department of Elections Website

sfelections.org

The Department website provides San Francisco voters, candidates, and campaigns with access to information about and transactions with the Department. You will need to familiarize yourself with the website in order to confidently assist callers who may be seeking information or forms located online.

Additionally, you should familiarize yourself with the California Secretary of State's Elections Division website. You may direct customers here who are interested in statewide issues. For inquiries pertaining to campaign finances, or conflicts of interest, you will defer to the San Francisco Ethics Commission.

B. Code Provisions

The majority of processes overseen by Campaign Services is directly derived from state and local codes that dictate elections processes. For example, the font printed on ballots is dictated by law. Exceptions include HR protocols, workplace policies, or instances in which code dictates what must happen, leaving the determination of how to make it happen up to the Department. The most successful members of the Campaign Services team will familiarize themselves with commonly used passages in the various codes that govern our processes. Below are some commonly cited codes and their abbreviations.

Abbreviation	Name of Code or Regulation
CA Const.	California Constitution
CAEC	California Elections Code
CA Gov. Code	California Government Code
CA Admin. Code	California Administrative Code
SFC	San Francisco Charter
SFMEC	San Francisco Municipal Elections Code
SOS	Secretary of State
FPPC	Fair Political Practices Commission

C. Election Information Management System (E.I.M.S.)

This program is utilized by the Department in every division. It is the database that contains information for all registered voters, polling places, registration applications, processed ballots, incumbents and other elections related processes in San Francisco.

You will utilize modules within EIMS every day. It will prove helpful to always keep this program open at your computer workstation.

D. Archival Files

Personnel are encouraged to supplement their understanding of our filing systems by examining the cornucopia of files within our office cabinets. Digital files are stored on the **O:Drive** and physical files are stored in the black cabinets in the back hallway. By examining the files within, you may gain a more thorough understanding as to what constitutes a full and complete candidate filing. Additionally, Department personnel frequently complete post-election reports, the contents of which will supplement your knowledge of our operations.

E. Guides and Calendars

The Campaign Services team is responsible for creating and updating Candidate Guides, which detail filing deadlines and processes for candidates each election cycle, as well as Process Guides, which detail miscellaneous elections processes (Recalls, Referenda, Ballot Argument filing etc.). Campaign Services also maintains the Department calendar, which compiles all of the filing deadlines for all of the offices on the upcoming ballot along with other voter-related deadlines.

These guides and calendars are public documents and are available on the Department website. Printed copies are available upon request. It will be your responsibility to explain some of our processes. It is important to develop a fundamental understanding of these guides. The guides are updated each election cycle to reflect calendar dates and updated Elections Code.

F. Department Publications

1. Poll Worker Training Manual

This booklet is developed and published by The San Francisco Department of Elections. It contains written instructions for procedures executed by Poll Workers on Election Day, instructions for operating election equipment, and other Department protocols.

2. Voter Information Pamphlet (local)

This booklet is developed and published by The San Francisco Department of Elections. It contains ballot language for each of the local measures that appear on the ballot, official arguments and paid arguments for and against the local ballot measures, candidate statements by local candidates, and other Department related information.

3. Voter Information Guide (statewide)

This booklet is developed and published by the California Secretary of State. It contains ballot language for each of the statewide measures that appear on the ballot, official arguments and paid arguments for and against the statewide ballot measures, candidate statements by candidates for statewide office, and other Secretary of State related information.

4. Voter Outreach

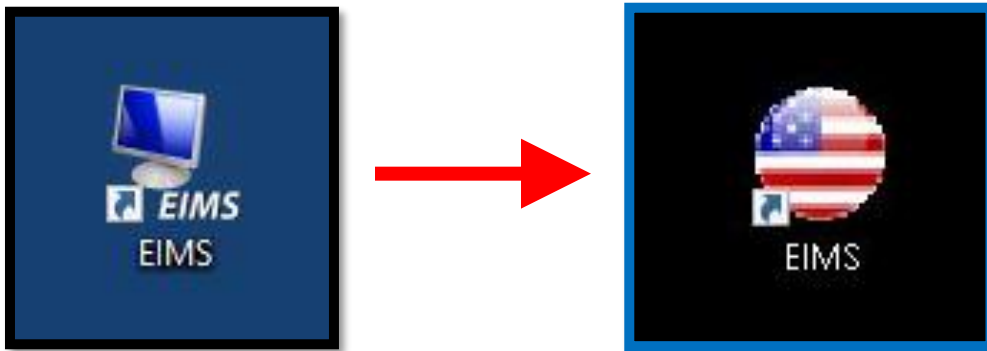
The Voter Outreach division creates most of the informational signage utilized by the Department. This division regularly interacts with the public at a variety of events – citizenship ceremonies, farmers' markets, SF Pride, and other community events. The Outreach team works year-round to engage the various communities within San Francisco, spreading the word about voter registration and voting processes. The Outreach page on the Department website is a great resource and includes links to presentations about many elections-related topics including Ranked-Choice Voting and Voter Registration Drive Rules: <https://sf.gov/voter-outreach>

Appendix A

Certificate of Registration

The Department offers Certificates of Registration on demand to registered San Francisco voters for \$1.50. This document serves as proof of registration. If an individual is not currently registered, they must first register to vote. Usually we ask voters to allow 3-5 business days for processing.

1. From your computer, launch the EIMS application.



2. Within EIMS, expand the 'Voters' menu



3. Open the 'Voter Display' module



4. Enter voter information (name, ID, or address) and click the 'Search' button.

The screenshot shows the 'Voter Display' application window with the 'Voter Lookup' tab selected. The 'Search Criteria' section on the left includes a 'Voter Status' dropdown menu with options: Active (selected), Inactive, Cancelled, Pending, All, and Audit Log. The main search area contains several input fields: Name (Last, First), Precinct/Portion, Reg Number, SSN, VBM Program Status, Voter ID, Driver License, Address, City Code, Birth Date, Status Reason, State Voter ID, User Code, Birth Place, Language, and Party. A red arrow points to the 'Voter ID' field. Another red arrow points to the 'Search' button. Below the search criteria is a table with columns: Reg Nu..., Voter ID, Name, Residence Address, City, Preci..., Mailing Address, Birth D..., Reg D..., Driv..., and SSN.

5. A list of potential matches will populate. Choose the correct voter and double-click.

Voter Display

Voter Lookup

Search Criteria

Voter Status

☒ Active
☐ Inactive
☐ Cancelled
☐ Pending
☐ All
☐ Audit Log

Name (Last, First): San Francisco Voter
Precinct/Portion:
Reg Number:
SSN:
VBM Program Status: (all)

Voter ID:
Driver License:
Address:
City Code:
Birth Date:
Status Reason:

☐ Search by Mailing Address

State Voter ID:
User Code:
Birth Place:
Language: (all)
Party: (all)

Search
Clear

5 Voters found

Reg Number	Voter ID	Name	Residence Address	City	Pr...	Birth Da...	Reg Da...	Driv Lic	SSN
123456789	0123456	San Francisco Voter	1 Dr Carlton B Goodlett Pl	San Francisco	7532	1/1/1923	1/1/1941	D010101	9876
234567891	1234560	San Francisco Voter, Jr.	Pier 39	San Francisco	7301	6/6/1966	6/6/1986	A497630	5555
345678912	2345601	San Francisco Voter, III	850 Bryant St	San Francisco	7617	2/22/1987	2/22/1987	Q993311	0000
456789123	3456012	San Francisco Voter, IV	1 Candlestick Park Way	San Francisco	7055	8/17/1977	3/4/1999	LMNOP	3333
567891234	4560123	San Francisco Voter, V	66 Lake Merced Blvd	San Francisco	9722	9/15/1984	9/15/1984	I07734	6666

6. This next screen will display the voter's registration information.

Voter Display

Voter Lookup

Voter Information

Active Voter (Change Requested by Voter)

Voter ID: 0123456
Reg Number: 012345678910
Current Reg Date: 9/8/2023
Driver License/ID: D010101
Precinct: 7532 Pct 7532
Original Reg Date: 1/1/1941
SSN: 9876
Title/Name/Address: San Francisco Voter
1 Dr Carlton B Goodlett Pl
San Francisco, CA 94102
Mailing Address:
ID Required:
☐ Other ID Provided:

State Voter ID: 2222222
Reg Location:
DMV COVR Renewal
Registration Form Type:
Electronic (Online)
Reg Method:
DMV DL/ID Renewal by Mail
ID Verification: Verified
Moved From:
Moved To:
E-Mail Address:
Alternate/Opt Out E-Mail Address:
☐ Opt Out of Local VIG
☐ Opt Out of State VIG

Personal Data

Birth Date: Age: Birth Place: CA - California
Citizenship Code: Party:
Yes No Party Preference
Occupation: Gender: Language: English
Remarks: Call Log Entries View Attached/Supp Docs
6/7/23 cc-29674 es >
2/27/23 cc-29457 es >
cc-19256 GL 5/21/18
image_id: 30642538

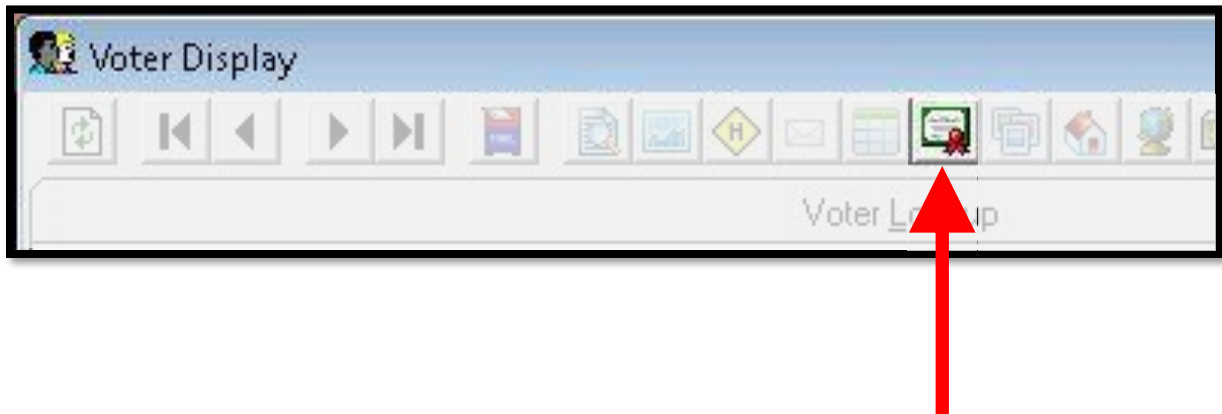
Flags

Show ID at 1st federal election
VBM Pgm Status: Perm
User Codes:
ID Provided Date: Expiration Date:
Rcv Ballot Preference: (none)
Voter Assistance Requested: (none)
View Signature History
View VBM Return History

Voter Signature

Locator Number: 2016-3-36053-17
Last Update Group: 109915
Last Update User & Workstation: VoteCal at DOE-HPZ-15
Last Update Date: 6/16/2023 8:23:27 AM
Administrative Update Date: 6/16/2023 8:23:32 AM

- Click the 'Certificate' icon, located in the upper task bar.



- A Certificate of Registration will generate, containing the information for this voter.


JOHN ARNTZ
DIRECTOR OF ELECTIONS

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF ELECTIONS**
1 Dr. Carlton B. Goodlett Place, Room 48
San Francisco, CA. 94102 (415) 554-4375

This certificate of registration verifies the voter registration status of the person named below. It has been provided in lieu of a photocopy of the Affidavit of Registration and is evidence of citizenship for voting purposes only (California Election code 2112). Additional documentation may be necessary if used for proof of citizenship when traveling outside the United States. You may want to contact the foreign country's governmental tourism office or consult your travel agent.

I, John Arntz, Director of Elections for the City & County of San Francisco, hereby certify that the information below is true and correct data from the voter's registration affidavit on the Voter Registry of San Francisco. Witness my hand and seal on this day of September 08, 2023.

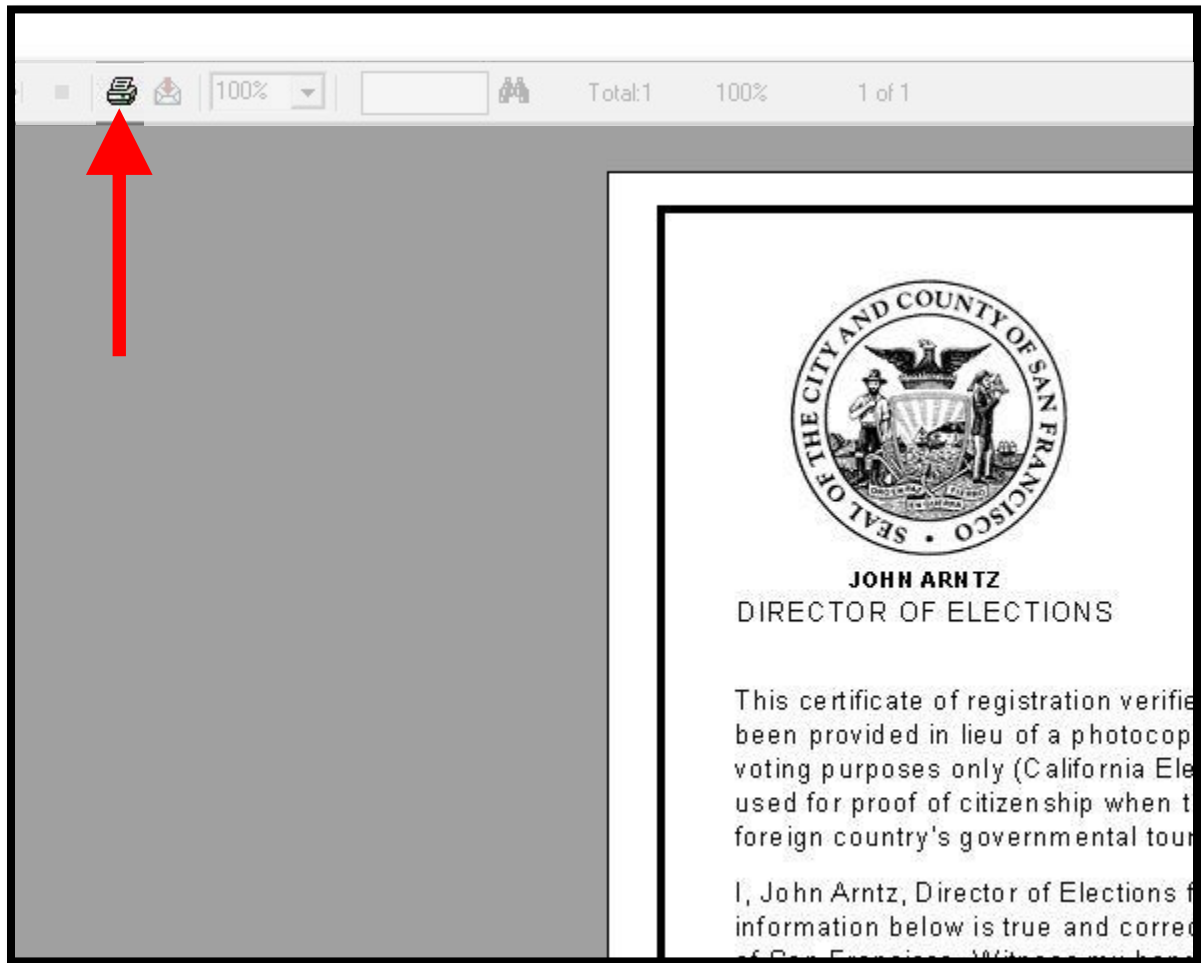
State of California
City & County of San Francisco

By: _____
Name: _____ Deputy

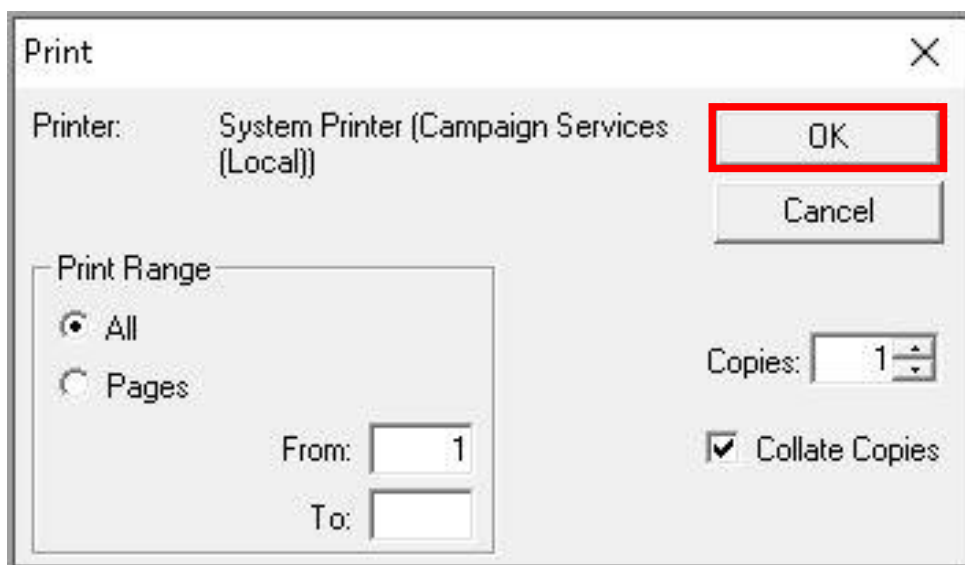
Certificate of Registration

Name:	San Francisco Voter	Affidavit Number:	0123456789101112
Address:	1 Dr. Carlton B. Goodlett Place	Original Registration Date:	01 / 01 / 1941
Party:	Party Preference		
Birthplace:	CA		
Birthdate:	01 / 01 / 1923		
Signature:	_____		

9. Click the 'Print' icon, located in the upper task bar.



10. The print dialogue will appear. The default printer is set to the Campaign Services Copy Machine. Click "OK" and the document will print.



11. Retrieve the document for the voter to review and complete.

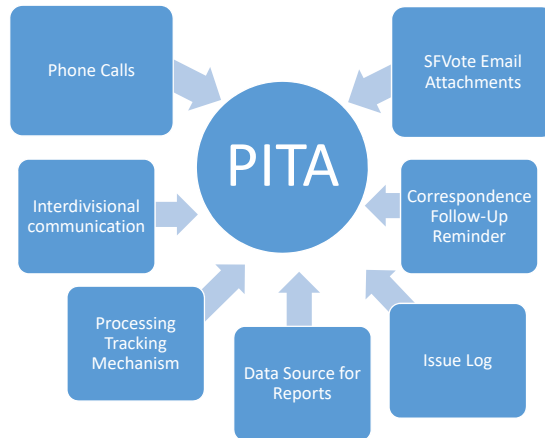
- a. If the voter confirms that the printed information is correct, ask the voter to sign the “**Signature**” line at the bottom.
- b. Department personnel (YOU) will sign the “**By**” line
- c. Print your name on the “**Name**” line.
- d. Use the Official Seal of the City and County of San Francisco to emboss the document.
- e. Collect the \$1.50 fee for the register.

 JOHN ARNTZ DIRECTOR OF ELECTIONS	CITY AND COUNTY OF SAN FRANCISCO DEPARTMENT OF ELECTIONS 1 Dr. Carlton B. Goodlett Place, Room 48 San Francisco, CA. 94102 (415) 554-4375												
This certificate of registration verifies the voter registration status of the person named below. It has been provided in lieu of a photocopy of the Affidavit of Registration and is evidence of citizenship for voting purposes only (California Election code 2112). Additional documentation may be necessary if used for proof of citizenship when traveling outside the United States. You may want to contact the foreign country's governmental tourism office or consult your travel agent. I, John Arntz, Director of Elections for the City & County of San Francisco, hereby certify that the information below is true and correct data from the voter's registration affidavit on the Voter Registry of San Francisco. Witness my hand and seal on this day of September 08, 2023. State of California City & County of San Francisco													
By: <u><i>Your Signature</i></u> Name: <u><i>Your Name</i></u> Deputy													
<u><i>Certificate of Registration</i></u>													
<table style="width: 100%;"><tr><td style="width: 50%;">Name: San Francisco Voter</td><td style="width: 50%;">Affidavit Number: 0123456789101112</td></tr><tr><td>Address: 1 Dr. Carlton B. Goodlett Place</td><td>Original Registration Date: 01 / 01 / 1941</td></tr><tr><td colspan="2">Party: Party Preference</td></tr><tr><td colspan="2">Birthplace: CA</td></tr><tr><td colspan="2">Birthdate: 01 / 01 / 1923</td></tr><tr><td colspan="2">Signature: <u><i>Voter Signature</i></u></td></tr></table>		Name: San Francisco Voter	Affidavit Number: 0123456789101112	Address: 1 Dr. Carlton B. Goodlett Place	Original Registration Date: 01 / 01 / 1941	Party: Party Preference		Birthplace: CA		Birthdate: 01 / 01 / 1923		Signature: <u><i>Voter Signature</i></u>	
Name: San Francisco Voter	Affidavit Number: 0123456789101112												
Address: 1 Dr. Carlton B. Goodlett Place	Original Registration Date: 01 / 01 / 1941												
Party: Party Preference													
Birthplace: CA													
Birthdate: 01 / 01 / 1923													
Signature: <u><i>Voter Signature</i></u>													
													

Appendix B

**Public Inquiry Tracking Application
(P I T A)**

Public Inquiry Tracking Application (PITA)



Why PITA?

The Department uses PITA:

To track voter inquiries made over the phone, through SFVote, and in-person over the counter.

As a communication mechanism between divisions.

To transfer documents submitted by voters between divisions.

To assess the number of inquiries the Department receives on a hourly, daily, and weekly basis.

To evaluate the type of voter inquiries the Department receives.

To maintain quality control of accurate correspondence and processing timelines.

To manage resources and inform procedures.

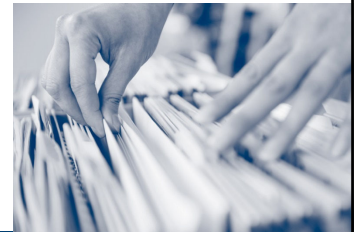
To identify potential issues.



PITA is a Publically Accessible Document

Per the Sunshine Ordinance, which was adopted by San Francisco voters in 1999, all communication within the Department of Elections is subject to public information requests.

- All communication entered into PITA is retained and may be reproduced upon public request.
- Communication between divisions needs to be clear, complete, brief, and accurate.
- Always communicate in a respectful and professional manner.
- Be mindful when selecting 'Inquiry Type' and 'Status Reason.'



Accessing PITA

No username or password required to start logging calls
(bookmark this page)

doe-net2/pita/login.php

City & County of San Francisco
Department of Elections

Public Inquiry Tracking Application

Input New Inquiry

Username Password Log in

Select "Input New Inquiry" to begin

PITA Entry Fields

Public Inquiry Tracking Application
Input New Inquiry

Annotations:

- You**: Points to the Operator dropdown menu.
- Call or Email?**: Points to the Inquiry dropdown menu.
- Important! Get the right Voter ID.**: Points to the VoterID field.
- Keep it brief**: Points to the Description text area.
- Attach files here**: Points to the Attachment section.
- Identify the issue**: Points to the Issue dropdown menu.
- Language of Call**: Points to the Language dropdown menu.
- Autofill based on Voter ID**: Points to the fields for First Name, Last Name, Street, Phone, Email, and ZIP.
- Do not use**: Points to the Notes text area.
- This transfers the request to other divisions**: Points to the Status dropdown menu.

Form Fields:

- Operator: Peter Stevens
- Topic: select
- Inquiry: select
- Category: Phone
- Language: select
- VoterID: N/A
- First Name: N/A
- Last Name: N/A
- Street: N/A
- Phone: N/A
- Email: N/A
- ZIP: N/A
- Description:
- Notes:
- Attachment: Choose File | No file chosen
- Status:
- Submit
- Back to Main Menu

PITA Entry with Attached Document

If a voter submits a form or application through SFVote, you will need to attach the document to the PITA entry.

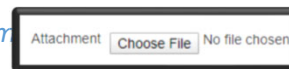
1. Review the document for completion. Ensure the document has a name, date of birth, San Francisco address, and signature.*

**You are only responsible for checking if the document is signed or not. You are not comparing the signature.*

2. Save the document as a PDF in `O:\All\SFVOTE\SFVote Email Attachments` based on the date the document was received.

3. Rename the PDF file as `yyyymmdd.Lastname-Firstname.Form`

4. Attach the file by selecting the "Choose File" button



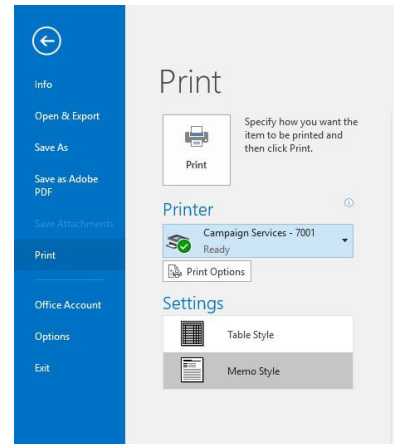
5. If the document is a **VBM Application**, select the status reason, '**Transfer VS – VBM Application**'
6. If the document is **anything other than a VBM Application**, select the status reason, '**Transfer VS – Document**'

Attach Document in PITA

Sometimes, we will need to use a copy of the SFVote email as an attachment to include in a PITA entry.

For example, a Third Party Notification submitted through the online tool.

- Do not save the email using “Save as Adobe PDF” function
- Go to “File” on the top left, Click “Print”, change the printer to “Adobe PDF” then print the email as Memo Style
- Save the document to a corresponding folder in [O:\All\SFVOTE\SFVote Email Attachments](#) based on the date of the document was received.
- Name the file as [yyyymmdd_Lastname,Firstname_FormType.pdf](#)



PITA Inquiry Type Glossary

Why did they call?

Inquiry Type	Description	Status
ADA – Accessibility	• Accessibility of polling places or voting machines • Requests or information about large-print or audio Voter Information Pamphlets • Inquiries related to the Accessible Vote-by-Mail System	Closed - VT OR Transfer - VT
Bilingual/Language Information	• Adding or removing language preference from registration • Requests for materials in other languages	Closed – VT OR Transfer - VS
Candidate or Campaign Information	• Calls from candidates or campaign staff • Deadlines for candidate/ballot measure filings • Campaign or candidate contact information • Ballot Measure Information • Complaints about campaign calls/texts/mailers • Electioneering concerns	Closed - VT
Conditional Voter Registration (CVR)	• Voters who want to register after registration deadline (E-15) • Voters who want to update their information after the registration deadline (E-15) • Instructions on how to cast a Conditional Provisional Ballot	Closed – VT
Departmental Information	• Basic inquiry about DOE hours of operation, address, phone numbers, etc. • Basic inquiry about City Hall • HR/Administrative inquiry	Closed - VT
Early Voting Information	• Calls from voters asking about early voting at City Hall	Closed - VT
Election Information	• Election-related questions that don't fall into a different category	Closed - VT

PITA Inquiry Type Glossary

Why did they call?

Inquiry Type	Description	Status
Media Inquiries	- Calls from people who work for the media - Calls in response to media stories	Closed - VT
NPP Inquiry	Inquiries regarding whether or not NPP voters can vote in certain contests (i.e., "I'm a registered No Party Preference voter, can I vote for X candidate?")	Closed - VT
Out of County	Calls from people who don't reside in San Francisco (usually calling by mistake)	Closed - VT
Outreach Inquiry	- Calls to request outreach and educational materials - Calls about conducting a voter registration drive	Closed - VT
Overseas Voting	- Calls from voters who would like to vote while overseas - Calls from voters serving in the Military	Closed - VT
Poll Worker Information	- Calls about becoming a poll worker or recruitment office information - Calls about poll worker training classes - Calls about poll worker precinct assignments - Calls about poll worker paychecks	Closed - VT
Polling Place – Complaint	Voter has feedback about their polling place or poll workers (most common on E-Day or post-election)	Closed - VT
Polling Place – Location	"Where is my polling place?" - Questions about whether voters can vote at polling places other than assigned	Closed - VT
Provisional Voting	- Inquiries related to provisional voting procedures - Calls about the counting provisional ballots - Calls about the provisional ballot status lookup tool	Closed - VT

PITA Inquiry Type Glossary

Why did they call?

Inquiry Type	Description	Status
Ranked-Choice Voting	- Inquiries about which contests use rank-choice-voting - Providing ranked-choice voting instructions	Closed - VT
Request - Hospital/Home Delivery	- Calls from voters who need assistance getting their ballot and qualifies for a hand-delivered ballot after the registration deadline (E-15) - Calls from voters in the hospital asking about voting options - Calls from hospitals or care facility representatives	Transfer - VT
Request - VNC	Voters who request a "receipt" when a change is made to their registration record	Transfer VS
Results	- Inquires related to current election results or the results reporting schedule - Calls about past election results	Closed - VT
VBM-Apply or update	- Inquiries about how to become a vote-by-mail voter - Inquiries about updating the mailing address where a vote-by-mail ballot is sent	Closed - VT
VBM-Challenge Letter	- Inquiries in response to challenge letters, calls, or emails - Calls from voters whose VBM ballot status is challenged or pending challenge	Transfer - VDA
VBM-Confirm Status	- Calls from voters confirming their VBM status - Calls from voters asking when they should expect to receive their ballot	Closed - VT
VBM-Instructions	- Questions about how to mark, sign, or return their ballots - Instructions when a voter makes a mistake on their ballot that does not require a replacement ballot - Calls from voters who receive an extra or are missing a ballot card - Calls from voters who "swapped" ballots within a household	Closed - VT OR Transfer – VDA

PITA Inquiry Type Glossary

Why did they call?

Inquiry Type	Description	Status
VBM-One-Time Request by Phone	Calls from voters requesting a one-time vote-by-mail ballot over the phone. (Over-the phone requests cannot be facilitated if the voter is already a vote-by-mail voter)	Transfer VS
VBM-Replacement Ballot*	- Calls from voters requesting a replacement VBM ballot to be sent to the same address - Calls from voters requesting a replacement VBM ballot to be sent to a different address - Calls from voters requesting a replacement VBM ballot in a different language	Closed - VT OR Transfer VS (if the online tool does not work)
VIP/VIG	- Calls about the VIP or Sample Ballot - Calls about the Voter Information Guide (VIG) produced by the Secretary of State - Calls from voters requesting to opt-out of the paper VIP (email address required)	Closed - VT OR Transfer VS
Voter Registration – Apply or Update	- Calls about how to register to vote - Explaining reasons that a person would need to re-register - Calls about who can register to vote - Instructions on how to update voter a registration record that does not require re-registering - Notification of duplicate voter record	Closed - VT OR Transfer - VDA
Voter Registration – Cancel	- Calls from voters whose registration has been cancelled - Instructions for how to cancel voter registration - Third-party address notifications - Notification of deceased voter	Closed - VT

* These PITA entries are Closed – VT because we will be processing the request through the online tool.

PITA Inquiry Type Glossary

Why did they call?

Inquiry Type	Description	Status
Voter Registration – Confirmation	- Calls from voters asking whether or not they are registered to vote - Calls from voters asking what district they are in - Calls from voters seeking a Certificate of Registration ("proof of residency") - Calls from inactive voters requesting activation - the voter must confirm the same residence address and mailing address that is on their voter record. If different, they must complete a Registration Update form.	Closed – VT OR Transfer VS
Registration – Special Circumstances	- Inquiries regarding voters with criminal convictions, voters without a fixed address, voters in college, new citizens, and confidential voters (Safe-at-Home program) - Inquiries regarding non-citizen voters (Board of Education Elections) - Pre-registration inquiries	Closed – VT
Website Related	Calls from voters with specific questions about the website	Closed - VT
Wrong Number/Lost Call	- Calls from voters who are trying to reach an organization or person other than the DOE - Dropped calls	Closed - VT

PITA Status

Is there further action needed? Which division will resolve the issue?

For Voter Support Use

Phone bank operators will only be using the following 4 inquiry status for phone entries:

- Closed - VT: No further action is needed
- Transfer - VS: Transfer the issue to VS, further action is needed
- Transfer - VT: Hospital/Home delivery request, ADA -Accessibility request, inquiry needs further review
- Transfer - VDA: Notice of duplicate records, VBM challenges

For Campaign Services Use

- Closed - CS
- Transfer - VS
 - Transfer VS - Document (SFVote)
 - Transfer VS - VBM Application (SFVote)
 - Transfer - MILOS (SFVote and SFVoteAbroad)

For Voter Services Use

- Closed VS
- Closed VS - Document
- Closed VS - VBM Application
- Transfer - VT
- Transfer - CS
- Closed - MILOS

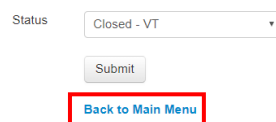
For Voter Data Analysis Use

- Closed - VDA

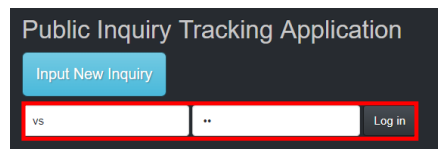
Accessing PITA with vs login

View and Search Inquiries – Logging in as VS will allow you to access the viewing and searching functions in PITA.

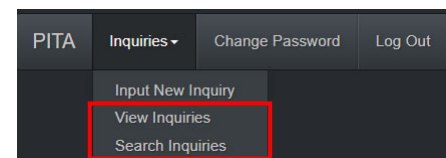
1. Click on **Back to Main Menu** at the bottom of the Input New Inquiry page



2. Log in – Username: vs Password: vs



3. Make your selection from the Inquiries drop-down menu



PITA – View Inquiries

Username: vs Password: vs

In View Inquiries you can view all PITA entries or you can select a specific a specific status to view. This will allow you to double check your entries and follow up on correspondence you have had with voters to make sure action has been taken on a voter record.

For example, a voter calls to let you know that their name is misspelled on their voter record. You will input this inquiry with details into PITA with the status, 'Transfer – VS.' If you notice the correction has not been made in EIMS 1-2 days later, check the PITA entry to make sure you selected the correct status. Once the error has been corrected, Voter Services will update the PITA record to 'Closed – VS.'

Public Inquiry Tracking Application

View Inquiries

View: All | Closed - VT | Open | Pending | Pending VT | Transfer VS | Transfer CS | Closed - VS | Closed - CS | Closed - VS - VBM Application | Transfer VS - VBM Application | Transfer VS - Document | Closed - VS - Document |

Input New Issue Search Issues Exit

Show 10 entries

Search:

Date	First Name	Last Name	House#	Street	Phone	Email	PCT	Voter ID	Operator	Issue	Description	Attachment
01/12/18 10:12	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Cheryl Li	Candidate or Campaign Information	wants to know mayor candidates contact info	
01/12/18 11:17	Amanda	Sidell	N/A	N/A	N/A	N/A	N/A	1514706	Cheryl Li	Voter Registration-Apply or Update	pending due to multiple reasons. instructed her to fill out a paper VRC	
01/12/18 11:22	Brennen	Smith	N/A	N/A	N/A	N/A	N/A	1474761	Gregory Slocum	Voter Registration-Apply or Update	Update to local address (in county change)	Brennen Smith update.pdf



15

PITA – Search Inquiries

Username: vs Password: vs

You can also search for specific PITA entries. These searches can be broad or specific. You are not required to fill out all fields to search for an entry. You may input any of the fields below.

Search Issues

First Name:		Last Name:	
House#:		Street:	
Phone:		Email:	
PCT:		Voter ID:	
Description:		Solution:	
Notes:		Issue Type:	
Language:		Operator:	

Search Exit



16

PITA: Important Things to Remember

- Be as complete as possible but keep the description brief. Input as many PITA entry fields as possible. This information helps various divisions locate the correct voter registration record in EIMS. This also helps us contact a voter in the event follow-up communication is needed. If a situation needs to be explained, or multiple issues are being addressed in one entry, a detailed description is appreciated, however, ask yourself, “what action needs to be taken?”
- Do not leave any field blank except for “Notes.” The fields that are auto-populated with “N/A” should not be cleared unless you want to enter text. If you accidentally clear the field, enter N/A again. All fields must have some text in order to submit an entry.
- Choose the ‘Inquiry Type’ that best fits the situation. Sometimes a call falls under multiple categories. Use your best discretion when deciding which ‘Inquiry Type’ best describes the call.
- Be very careful when selecting the ‘Status.’ If you accidentally select ‘Closed – VT’ when the inquiry should have been ‘Transfer – VS’ please let your supervisor know as soon as possible.
- Provide accurate information and always remain professional. Remember that PITA is a publically accessible document and anything you submit can be reproduced upon request.

PITA Questions?

