Attendance and Voting

Attendance and Voting are features of the *Meeting Manager*, built directly into the minutes build. Voting and Attendance can be used together, or they can be used separately. For example, if you do not record voting, you can still record your attendance.

Voting and Attendance can be displayed internally and to the public through the CivicWeb Portal. Your Implementation Specialist reviews these options with you.

Attendance provides a **Roll Call** button within the minutes which allows for a quick attendance count. Voting can be taken directly through the motion/resolution section of minutes items. Both of these results can be displayed internally or to the public through the *CivicWeb Portal*.

Note: To enable Attendance and Voting, you must speak with your Implementation Specialist or Customer Service.

Note: Recorded votes can be displayed on the published minutes, if desired.

Set Up the Members

To start using the Attendance and Voting tools, the members must first be setup on the meeting type.

To setup the members on the meeting type:

1. Click Meeting Manager.

A drop-down menu appears.

2. Click **Meeting Types**.

A new page opens.

3. To select the meeting type, click on its name.

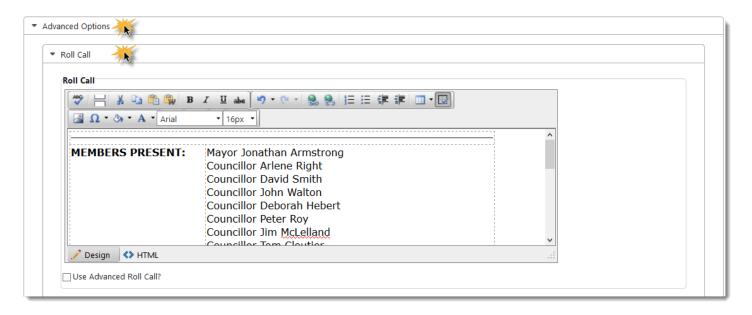
The Details page opens.

- 4. Click **Document Setup**.
- 5. Click the **Minutes** tab.
- 6. Click Advanced Options.

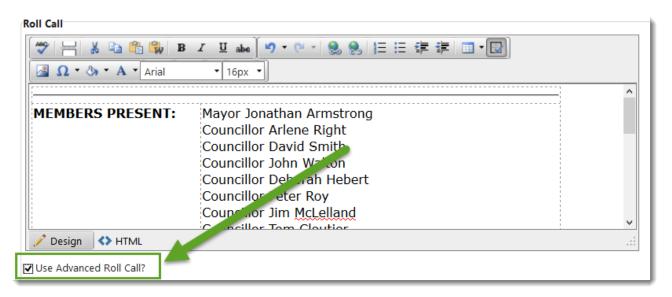
The section expands.

7. Click **Header**.

The section expands.

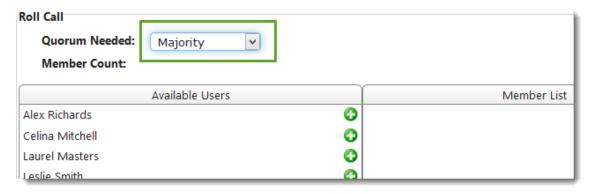


8. Select **Use Advanced Roll Call** at the bottom of the section.



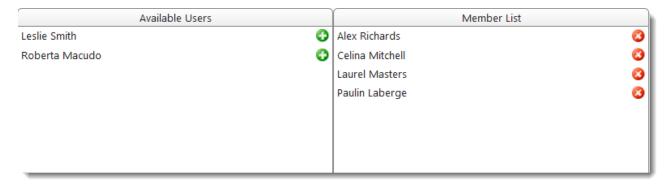
A new section appears below.

- 9. Select the **Quorum Needed** to conduct the meeting:
 - Majority: Select this option if 50% of the members plus one additional member must be present
 - o **2/3 Majority:** Select this option if 2/3 of the members must be present
 - Percent: Select this option to enter a percentage of members needed to reach quorum; for example, 75%
 - Member Count: Select this option to enter a specific number of members needed to reach quorum; for example, 6

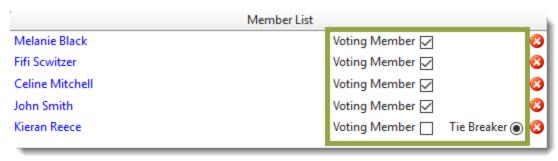


Member Count displays how many members are needed to reach Quorum.

- 10. Click onext to the user's name to add them to the Member List.
 - Click to remove a member from the **Member List**.



- 11. Deselect the Voting Member check-box for any members who do not vote.
- 12. Select Tie-Breaker for any non-voting members that can vote in the event of a tie.



13. Click Save and Close.

Attendance

The attendance feature places the roll call directly into the minutes where it can easily be captured with the click of a button. Attendance is also setup to ensure the required quorum is met.

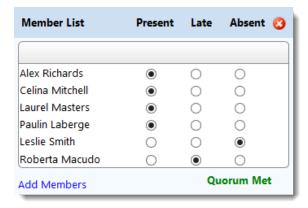
Attendance can be displayed both publicly and internally on the CivicWeb Portal.

To take attendance:

1. From the Minutes Build page, click Roll Call.



2. A list of members appears.



- 3. For each member, select if they are **Present**, **Late**, or **Absent**.
- 4. The list is marked as **Quorum Met** or not **Quorum Not Met** at the bottom right.



- 5. Click 0.
- 6. Click **Save** at the top left of the build page.

Voting

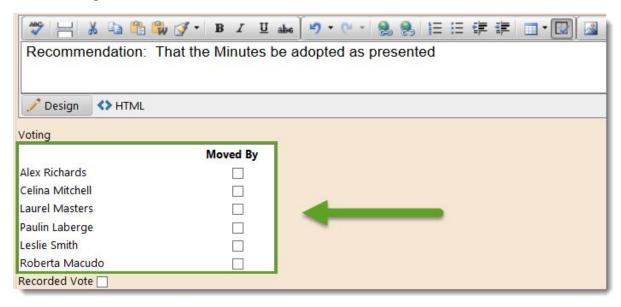
The voting is used to record votes directly within the minutes. The votes are tabulated to give **Carried/Lost** dispositions, and they can be displayed within the **Portal**, if desired.

Note: The list of members must be setup before votes can be recorded.

Once the attendance has been taken and the meeting has begun, it is time to start recording the votes on specific items.

To record votes:

- 1. From the minutes build page, click on a **motion/resolution** to record the vote.
- 2. In the Voting list, select the who **Moved** and who seconded the motion/resolution.

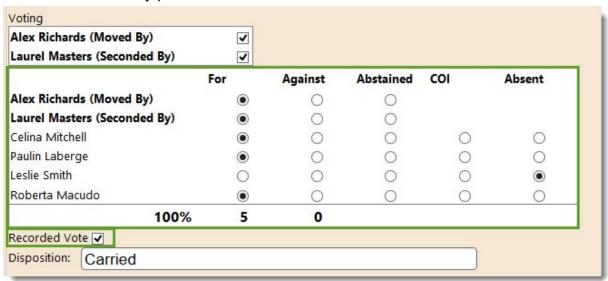


Select Recorded Vote.

A member list appears above.

4. For each member, select if they have voted **For**, **Against**, **Abstained**, or if there was a Conflict of Interest (**COI**).

Absent automatically pulls from the Roll Call.



For and Against are tabulated and the For percentage is displayed on the right. The Disposition auto-populates based on the percentage to **Carried** or **Defeated**.

5. Click the **Save** discon at the top left.

Tie-Breaker and Non-Voting Members

If a vote becomes tied, a tie-breaker may be required to carry or defeat the motion/resolution. Another attendee can be added to the roll call, which can be used to allow this attendee to vote and break the tie. A tie-breaker should be added to the Meeting Type so that it applies to all meetings of that type and can be used anytime. Members who do not vote can still have their roll call taken by adding them with the same method.

To add a tie-breaker to the meeting type:

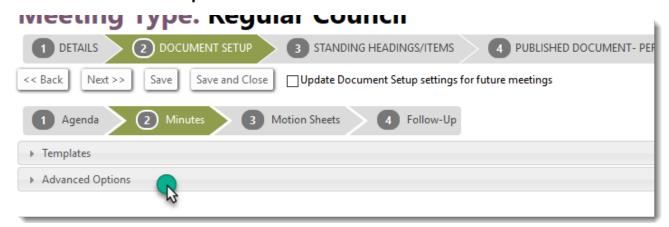
1. Click Meeting Manager.

A drop-down menu appears.

2. Click Meeting Types.

A new page opens.

- 3. Click on the name of the meeting type.
- 4. Click **Document Setup**.
- 5. Click Minutes.
- 6. Click Advanced Options.

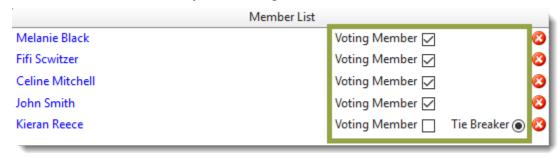


The section expands.

7. Click Header.

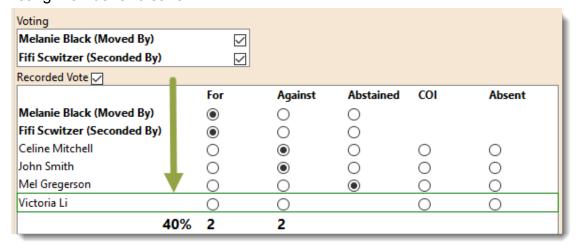
The section expands.

- 8. Scroll down to the Roll Call area.
- 9. Click onext to the member name in the Available Users list.
- 10. Deselect the **Voting Member** check-box.
- 11. Select **Tie-Breaker** for any non-voting members that can vote in the event of a tie.



12. Click Save and Close.

To use a tie-breaker during the meeting, take the vote as usual. Any tie-breakers that have been setup appear at the bottom of the Recorded Vote list in a green border. Use the tie-breaker like a normal voting member and save.

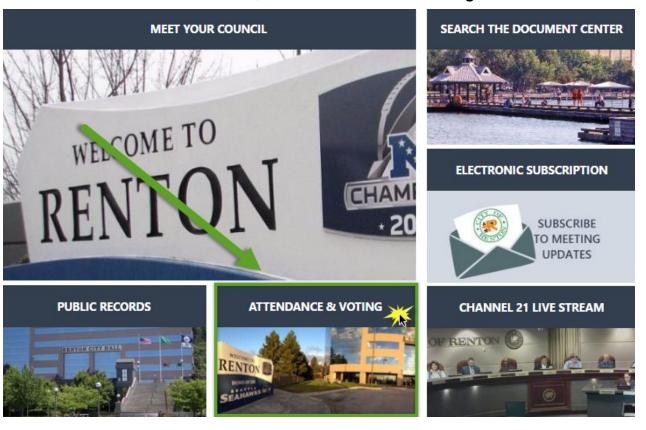


Attendance and Voting Portal Display

Once the Attendance and Voting has been recorded, and the minutes have been published, the results are available on the *CivicWeb Portal*, if enabled. The Attendance and Voting results page can be used internally or can be publicly accessible.

To review attendance and voting:

1. From the home Portal screen, click **Attendance and Voting**.



- 2. Select the **Member** from the drop-down list.
- 3. Select the **Meeting Type**, if desired.
- 4. Select a Date Range.
- 5. Click either **Show Voting**, or **Show Attendance**.



The results of the search display below.



Show Voting: This details the meeting Name, Date, Motion, Vote (for, against, abstained, or absent), and the Result (carried/lost and #for - #against).

Show Attendance: This details the meeting Name, Date, and Attendance (present or absent).