ADMIN GUIDE

Run your election, start to finish

Everything an election admin needs, step by step and with pictures: set up your ballot, invite voters, open voting, and get certified results. Most elections take under an hour to set up.

1 Quick checklist

Here's the whole job in order. Each step links to its chapter.

1. Sign in with the invite link we emailed you (password + authenticator app).
2. Check the name, add your election contact, and pick a PIN length.
3. Set voting dates, reminders, quorum, and who gets the certified report.
4. Upload your voter list.
5. *Optional:* collect nominations from members before you build the ballot.
6. Add your offices and candidates, for example President, Board of Directors and Treasurer. Type them in, or import them all at once from a spreadsheet.
7. Add your logo and colors, and any Yes / No questions.
8. Preview the ballot exactly as members will see it.
9. Send the save-the-date, then the how-to-vote email with each member's PIN.
10. Open voting (or let it open on schedule) and watch turnout.
11. *At your meeting:* run Meeting votes on motions, live in the room or on Zoom.
12. Close voting. Your secretary gets the certified report automatically. Download your records.

TIP

Your election starts in **test** mode. Members can't sign in until you switch it to **live**, so take your time setting up.

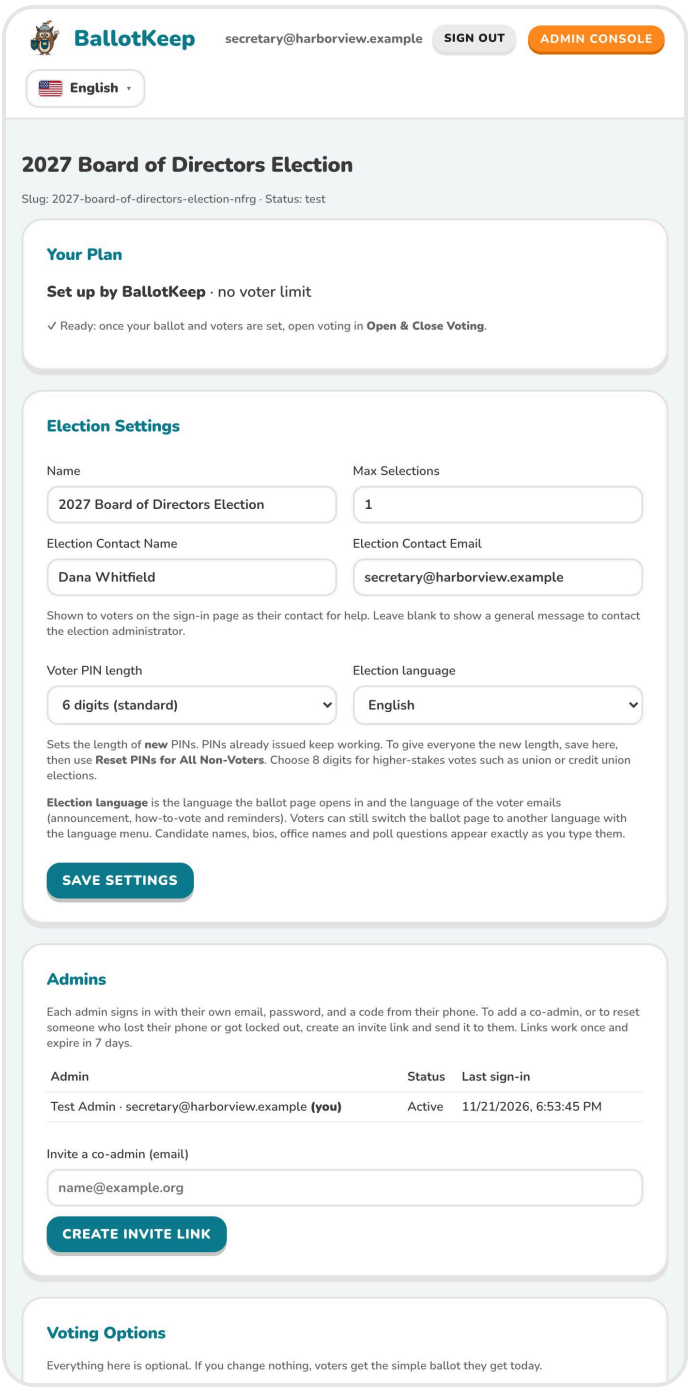
2 Sign in

We email your first admin an invite link. Open it to set a password and connect an authenticator app (Google Authenticator, Microsoft Authenticator, 1Password and similar). Save the recovery codes it shows you somewhere safe.

After that, sign in at **vote.ballotkeep.com/login** with your email, password and the 6-digit code from the app. You land on your **admin console**. The **Results & Records** button at the top opens the results page.

Co-admins

Every admin has their own login. Never share yours. In **Admins**, right below Election Settings, invite a co-admin by email. You get a one-time link to send them, and it works for 7 days. Use the same tool if someone loses their phone.

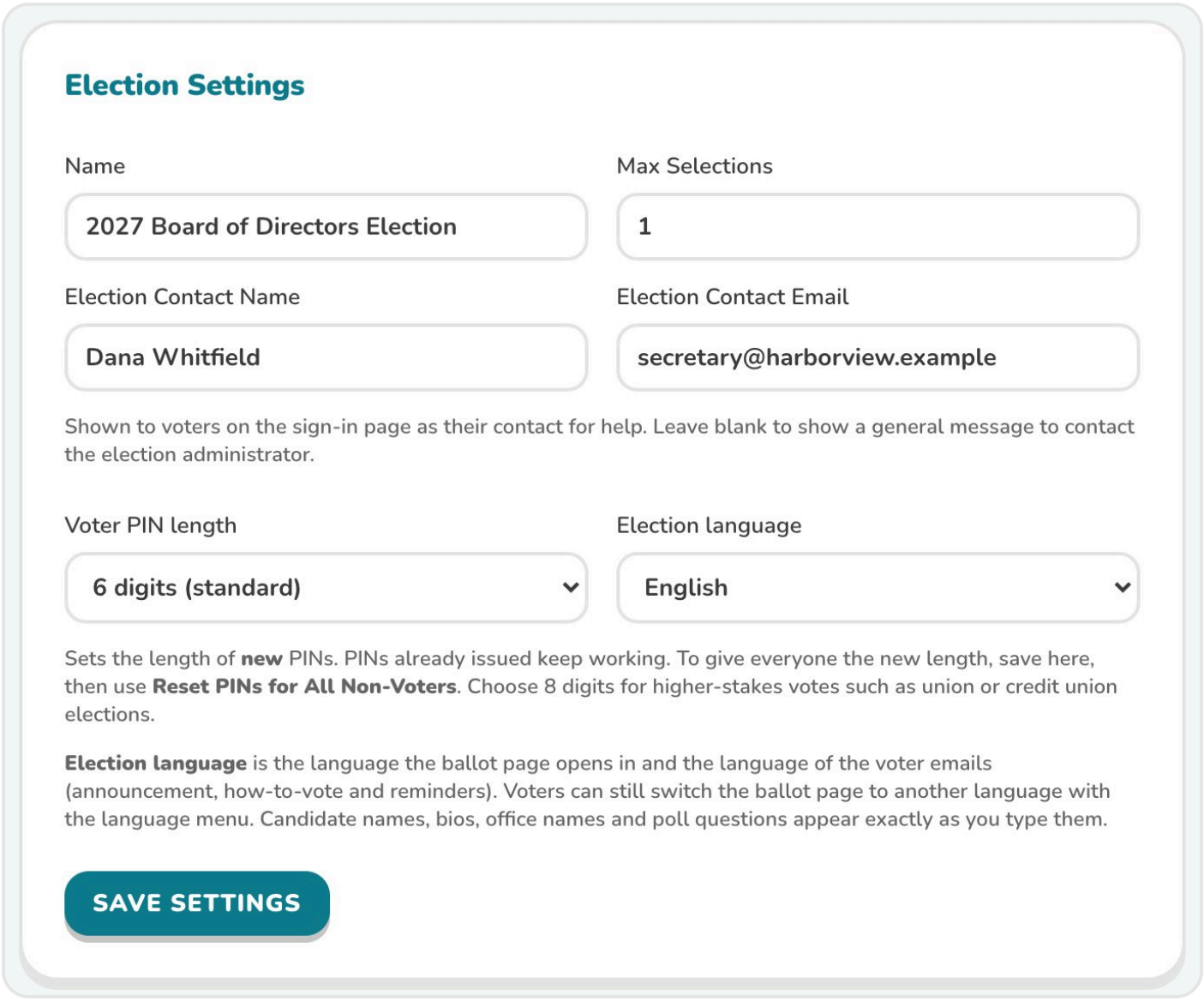


A brand-new election's admin console. Everything is on one page, top to bottom.

3 Election settings

- **Name:** what voters see at the top of the ballot, for example "2027 Annual Meeting Election".
- **Election contact:** shown to voters as who to ask for help. Replies to voter emails go here too.

- **Election language:** the language the ballot page opens in and the language of the voter emails. Members can switch the page to any of the 7 languages: English, Spanish, Chinese, Arabic, French, Vietnamese and Polish.
- **PIN length:** 6 digits is standard. Choose 8 digits for higher-stakes votes such as union or credit union elections.



GOOD TO KNOW

Opening voting needs an active plan with enough voter spots. If something's missing, the console tells you exactly what.

4 How voters choose

Pick (most common)
Voters check up to the number of seats. The candidates with the most votes win. "Vote for up to 3" elects three.

Ranked choice
Voters rank candidates 1st, 2nd, 3rd. Counted in rounds (instant runoff). Always one winner per office.

Approval
Voters check every candidate they find acceptable. The most approvals win the seats.

With **one office**, choose the method in **Voting Options → 1. How do voters choose?** and the seats in **Max Selections**. With **several offices**, each office card has its own method and seats.

Voters can always **abstain**, on the whole ballot or on any single office. An abstaining ballot still counts toward quorum.

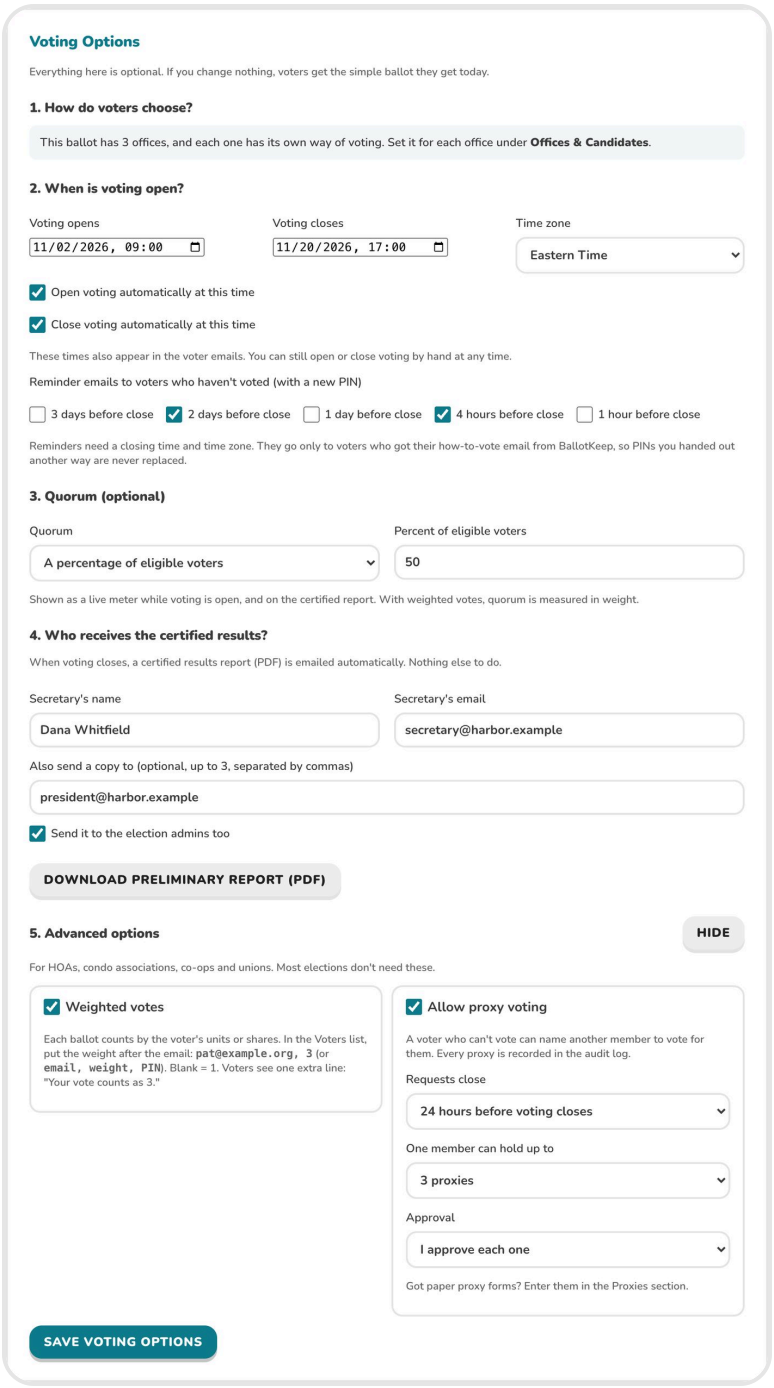
TIES
A tie for the last seat elects nobody in the tie and is flagged on the results and the report, so you can settle it under your bylaws. In ranked choice, a tie for last place in a round is broken by earlier rounds, then by a published lot. The report says so.

5 Dates, reminders, quorum

All of this is in **Voting Options**, and all of it is optional.

- **When voting opens and closes**, plus your time zone. These dates appear in voter emails.
- **Open / close automatically:** BallotKeep switches the status for you on time. You can still open or close by hand.
- **Reminders:** 3 days, 2 days, 1 day, 4 hours or 1 hour before close. They go only to members who haven't voted, and each one carries a new PIN.

- **Quorum:** a percentage of eligible voters or a number of ballots. Shown as a live meter and on the report.



TIP

Reminders only go to members who got their how-to-vote email from BallotKeep. PINs you handed out another way are never replaced.

6 Certified report

When voting closes, a **certified results report (PDF)** is emailed automatically to your secretary, up to 3 more people, and (if you leave the box ticked) your admins. Fill in the secretary's name and email under **Voting Options → 4**.

The report shows turnout, quorum, the results of every office (with every round of a ranked-choice count), any ties, and a fingerprint of your audit log. While voting is open you can download a **preliminary** report; after it closes, you can email it again at any time.

CERTIFIED ELECTION RESULTS

BallotKeep

Maple Grove Teachers Union, Local 214: 2027 Officer Election

Voting open Nov 1, 2026 7:00 AM Central Time to Nov 8, 2026 7:00 PM Central Time
Voting closed Nov 9, 2026 7:01 PM Central Time

ELIGIBLE VOTERS	BALLOTS CAST	QUORUM 30	ABSTAINED ON ALL
60	44 (73.3%)	Met	0

President (ranked choice, instant runoff, 1 seat)

Candidate	Round 1	Round 2
Rosa Delgado	19	**25 Elected**
Ann Liu	13	19
Hank Sorensen	12 (out)	eliminated
No further choices	0	0

Rosa Delgado won 25 of 44 ballots still counting in round 2 (more than half). 0 abstained.

Vice President (choose up to 1, 1 to elect)

Candidate	Votes	Result
Marcus Bell	25	**Elected**
Tina Okafor	15	
Abstained	4	

Secretary-Treasurer (choose up to 1, 1 to elect)

Candidate	Votes	Result
Lena Fischer	33	**Elected**
Omar Haddad	11	
Abstained	0	

Executive Board (choose up to 4, 4 to elect)

Candidate	Votes	Result
Luis Ortega	30	**Elected**
Nora Patel	28	**Elected**
Sam Whitfield	23	**Elected**
Grace Kim	22	**Elected**
Beth Navarro	15	

7 Weighted votes & proxies

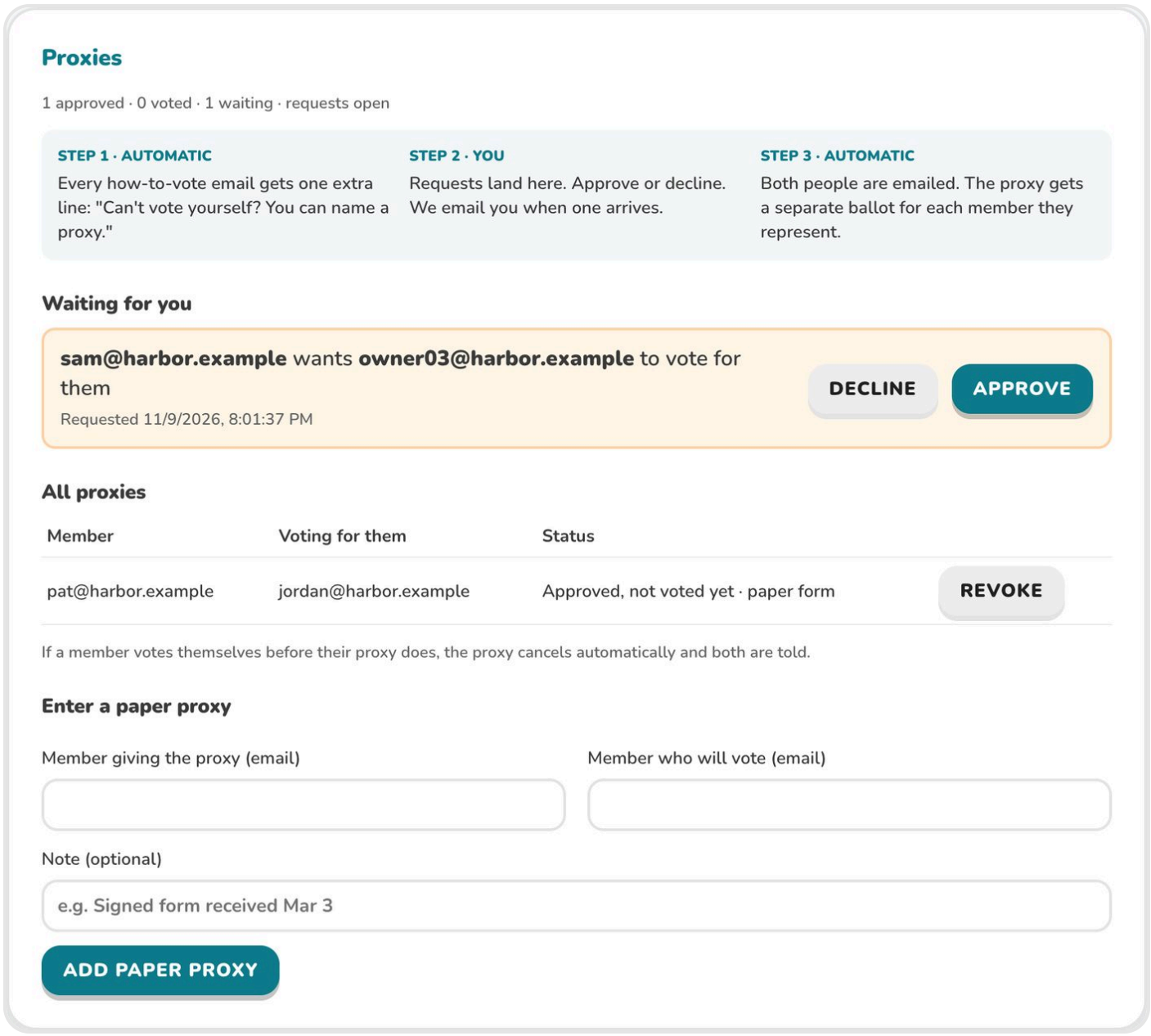
These are for HOAs, condo associations, co-ops and unions, and are switched off until you turn them on under **Voting Options → 5. Advanced options**.

Weighted votes

Each ballot counts by the member's units or shares, in every office. Quorum is measured in weight too. Turn this on **before** you upload voters, then put each member's units after their email (chapter 8).

Proxies

1. A member who can't vote names another member, or you enter a **paper proxy** form yourself.
2. You approve or decline each request (or choose to approve automatically). Both people are emailed.
3. The proxy signs in and sees a separate, clearly labeled ballot for each member they represent.



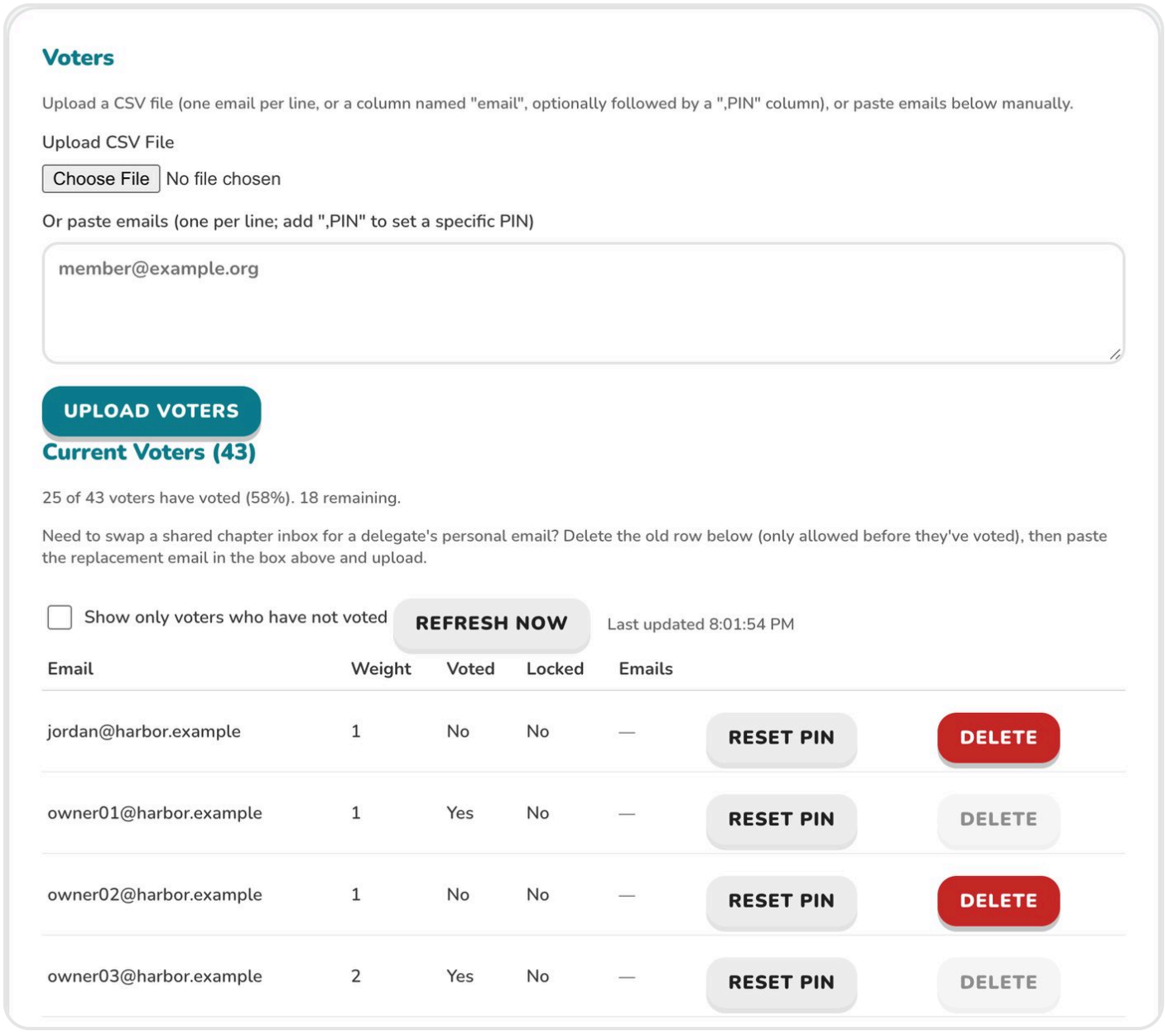
Choose when requests close (24 or 48 hours before voting ends, or at close) and how many proxies one member may hold. If a member votes themselves, their proxy is cancelled automatically.

8 Voters & PINs

Paste emails (one per line) or upload a CSV with an `email` column. You can add a PIN after a comma: `pat@example.org,482913`. Otherwise BallotKeep makes one. The easiest way is to let the how-to-vote email send everyone a fresh PIN (chapter 13).

With weighted votes on, put the weight after the email: `pat@example.org, 3` (or `email, weight, PIN`).

Text-message PINs (add-on): add a US or Canadian mobile number anywhere on a member's line, for example `pat@example.org, (413) 555-0123`, or add a `phone` column to your CSV. Tick the box confirming these members agreed to get texts. Numbers that aren't valid are listed so you can fix them.



The list shows who has voted, never how. "Reset PIN" helps one member, and "Delete" works only before they vote.

- **Typo in an email?** Delete the row (before they've voted) and add the right address.
- **Locked out?** After 10 wrong PINs a member is locked. Reset their PIN to unlock them.

- **Bulk PIN reset:** gives every non-voter a new PIN and downloads a CSV for a mail merge, if you prefer to send PINs yourself.

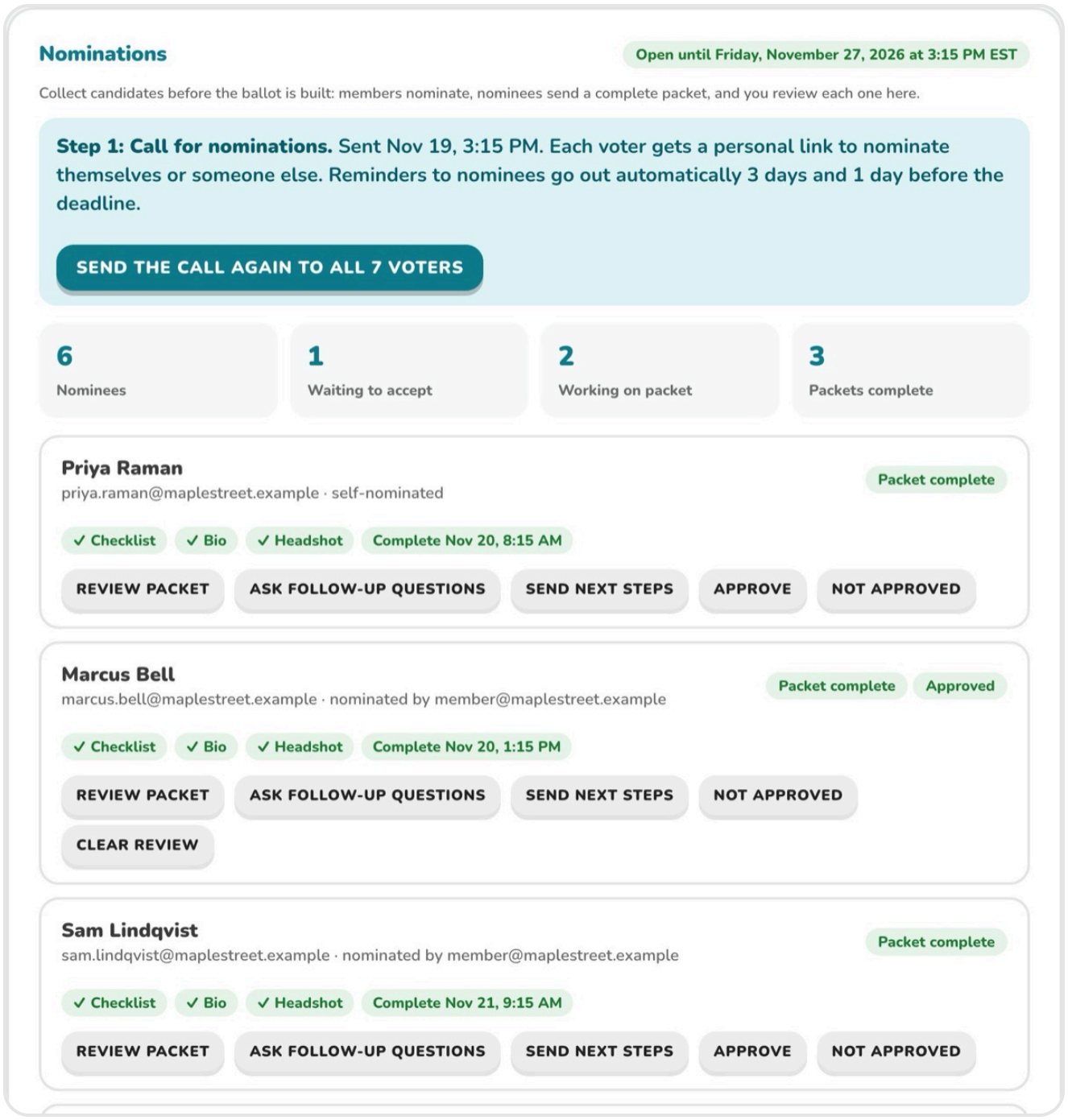
KEEP PINS SAFE

PINs are stored scrambled and can't be shown again later. If you download a PIN file, delete it after you've used it.

9 Nominations

Use **Nominations** when members should put names forward before you build the ballot. It's in the admin console, right after the voter list.

1. Tick **Use nominations in this election**, set when nominations close, choose who can nominate, and choose what each nominee must send: a checklist to agree to, a bio, a headshot or a resume. Click **Save nomination settings**.
2. Upload your voter list (chapter 8), then click **Send call for nominations**. Every voter gets a personal link.
3. Members nominate themselves or someone else. Anyone nominated by another member is asked to accept first.
4. Nominees send their packet. Every upload is checked for Social Security numbers, birth dates and financial account numbers, and files are deleted 30 days after upload.
5. Review each nominee: **Review packet**, **Ask follow-up questions**, **Send next steps**, **Approve** or **Not approved**. Nominees get reminders 3 days and 1 day before the deadline.
6. Add your approved nominees as candidates in Offices & candidates, by hand or from a spreadsheet. Approving a nominee doesn't put them on the ballot by itself.



TIP

If a nominee's private link was forwarded by mistake, open their card and click **Send a new link**. The old link stops working at once.

10 Offices & candidates

An **office** (some bylaws say "race" or "position") is one thing members vote on, with its own candidates: President, Vice President, Board of Directors, Treasurer and so on. Members sign in once and vote in every office on one ballot.

There are two ways to fill in your ballot, and you can mix them:

Type them in

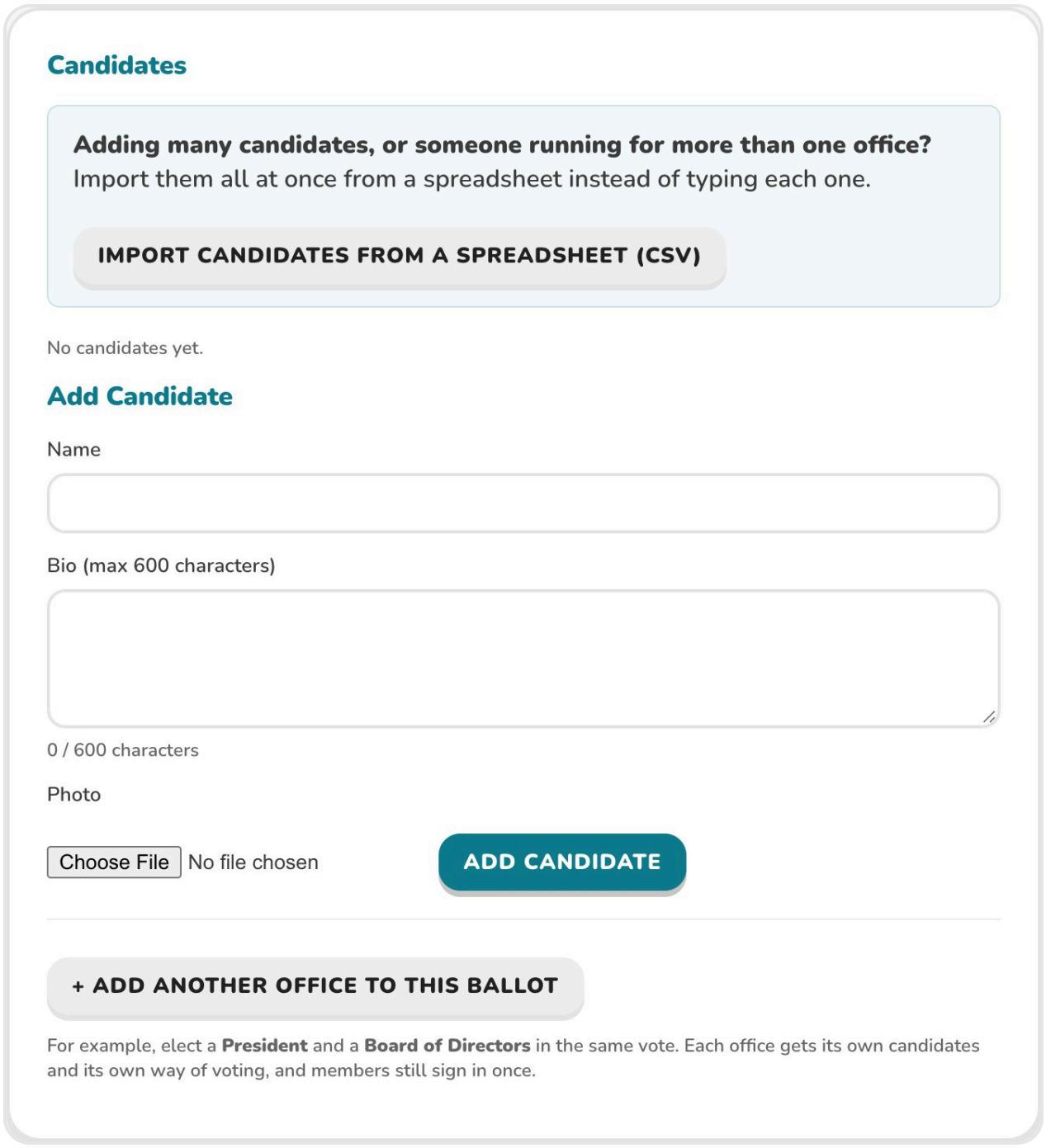
Best for a few candidates. Add each person's name, bio and photo, one at a time.

Import a spreadsheet

Best for many candidates, several offices, or anyone running for more than one office. BallotKeep creates the offices for you.

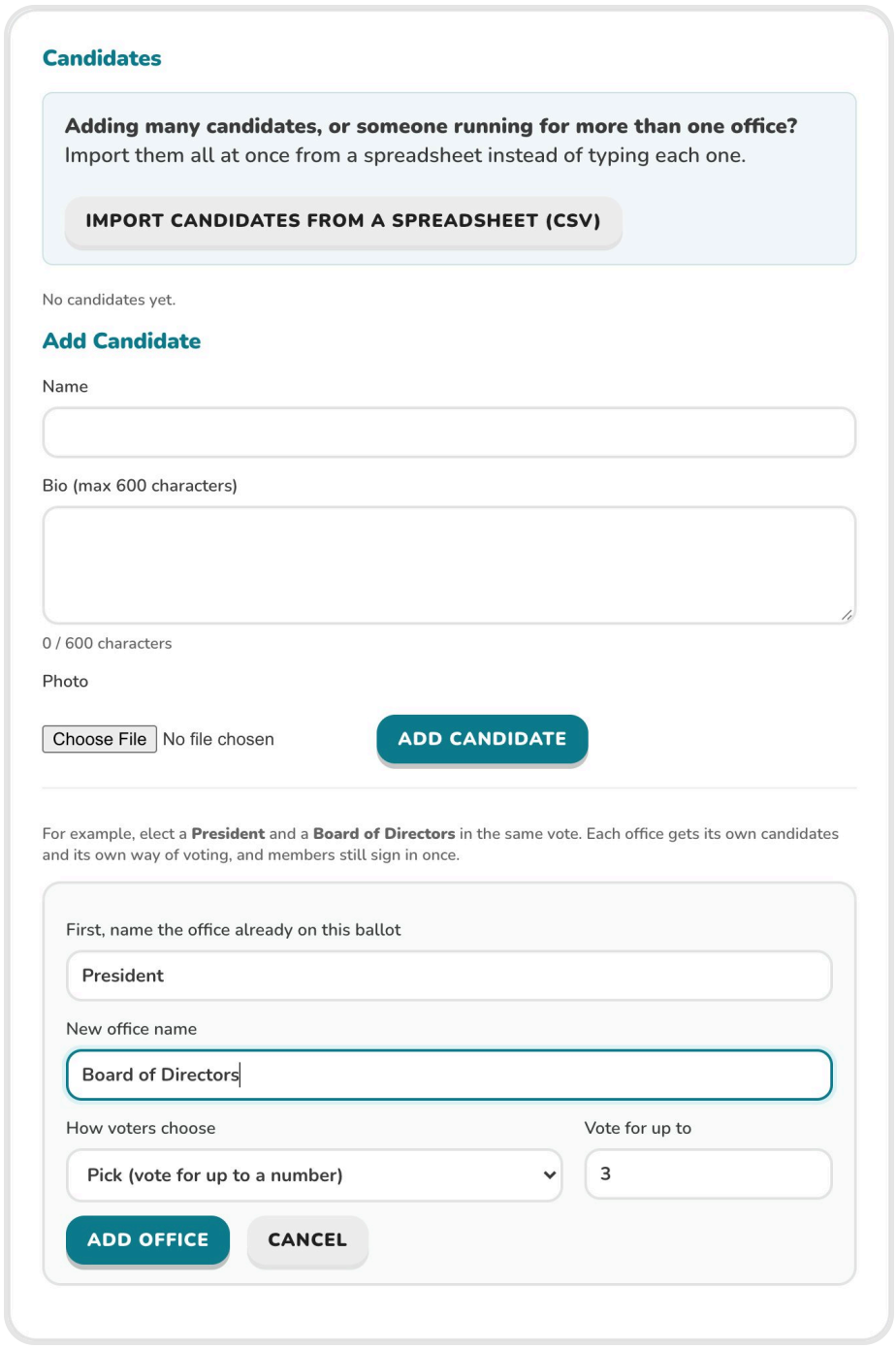
One office

A new election starts with one office. Under **Add Candidate**, type a name and an optional bio (up to 600 characters), choose an optional photo, and click **Add Candidate**. Many elections need nothing more.

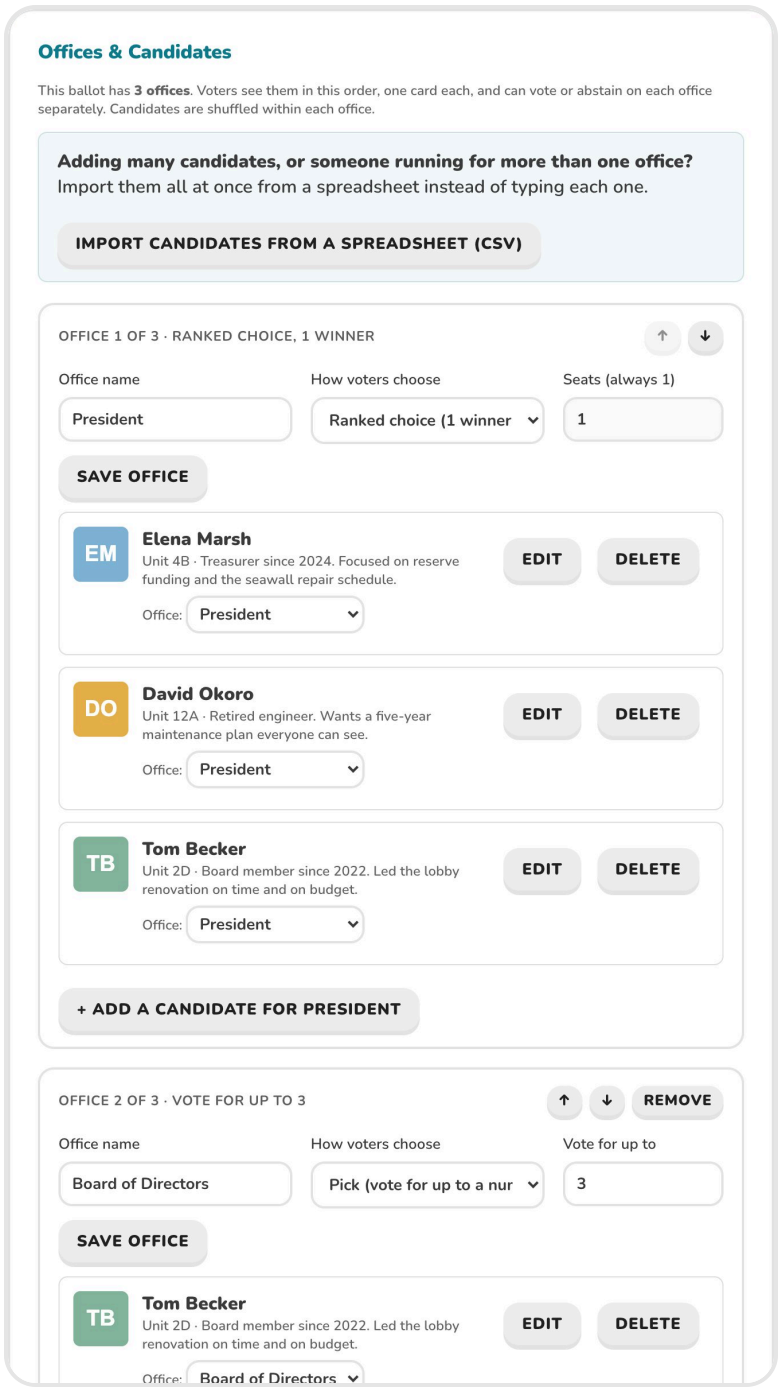


Adding more offices

1. Click **+ Add another office to this ballot**.
2. The first time, name the office that's already there, for example *President*.
3. Name the new office, for example *Board of Directors*, choose how voters choose, and set the number of seats.
4. Click **Add office**. Repeat for each office (up to 20).



Each office then gets its own card. You can rename it, change its method and seats, move it up or down, remove it (its candidates go with it), and add candidates straight to it. To move a candidate to a different office, use the **Office** menu under their name.



Voters see the offices in this order. Candidates are shuffled within each office for every voter, so ballot order favors no one.

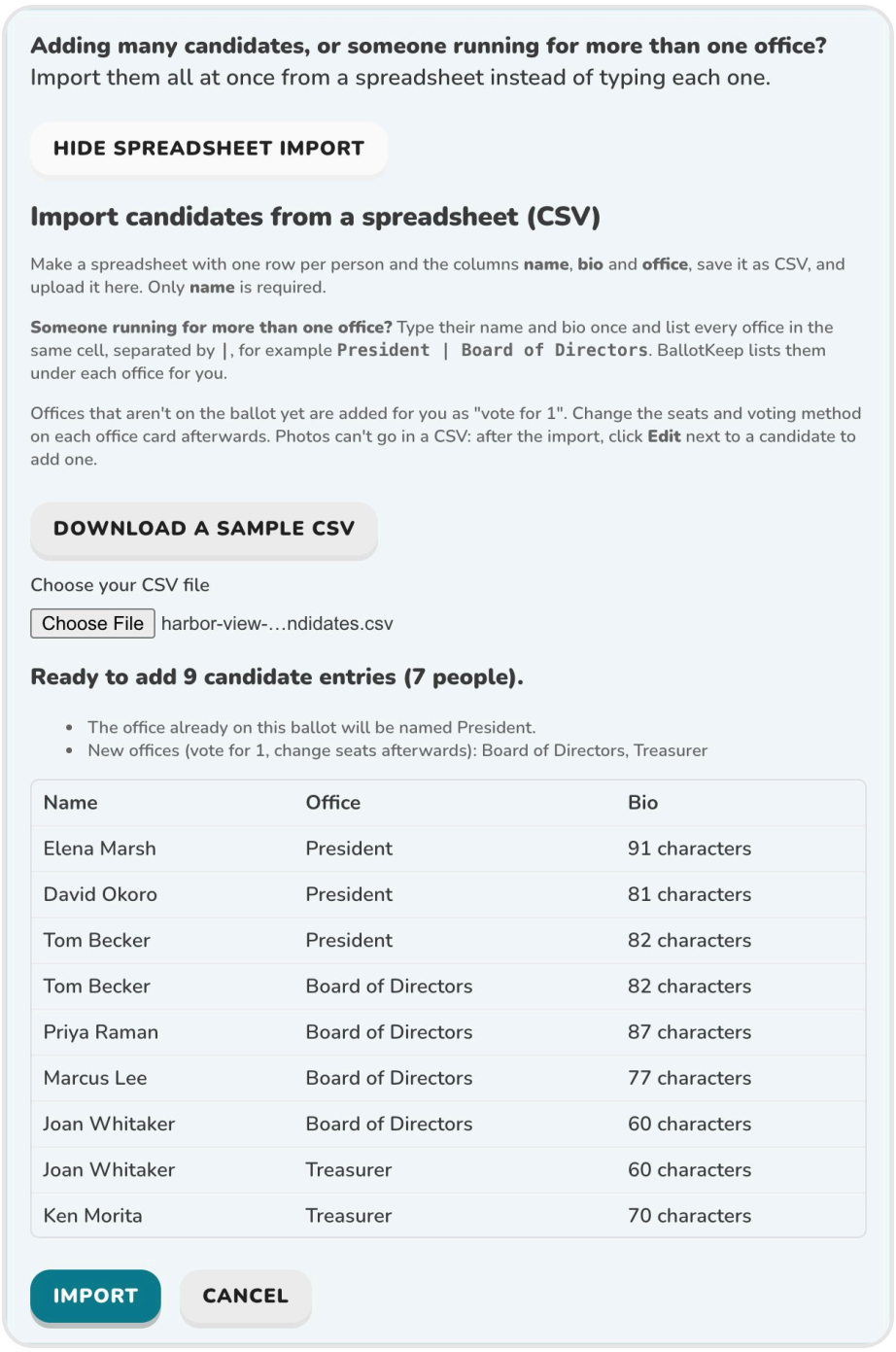
Importing candidates from a spreadsheet

If your candidates are already in Excel, Google Sheets or Numbers, or you have more than a handful, import them in one step instead of typing each one.

1. At the top of the Candidates section, click **Import candidates from a spreadsheet (CSV)**. For a ready-made file to fill in, click **Download a sample CSV**.

2. Put the headings **name**, **bio** and **office** in row 1, then one person on each row. Only **name** is required. Type each office name exactly as voters should see it.
3. Save it as CSV. In Excel: **File → Save As → CSV UTF-8**. In Google Sheets: **File → Download → Comma-separated values**. In Numbers: **File → Export To → CSV**.
4. Click **Choose File** and pick your CSV. BallotKeep checks it and shows what it will do: who goes in which office, and which offices it will create. Nothing is saved yet.
5. Click **Import**. Then check each office card: new offices start as "vote for 1", so set the seats and voting method you need. Add photos with **Edit**.

NAME	BIO	OFFICE
Elena Marsh	Treasurer since 2024. Focused on reserve funding.	President
Tom Becker	Board member since 2022. Led the lobby renovation.	President | Board of Directors
Priya Raman	Chairs the welcome committee.	Board of Directors



The preview, before anything is saved. Tom Becker and Joan Whitaker were each typed once and are listed under two offices.

IF A ROW HAS A PROBLEM

BallotKeep adds nothing and lists the rows to fix by row number, for example a missing name or a bio over 600 characters. Fix them in your spreadsheet and choose the file again. People already on the ballot are skipped, so importing a corrected file twice is safe.

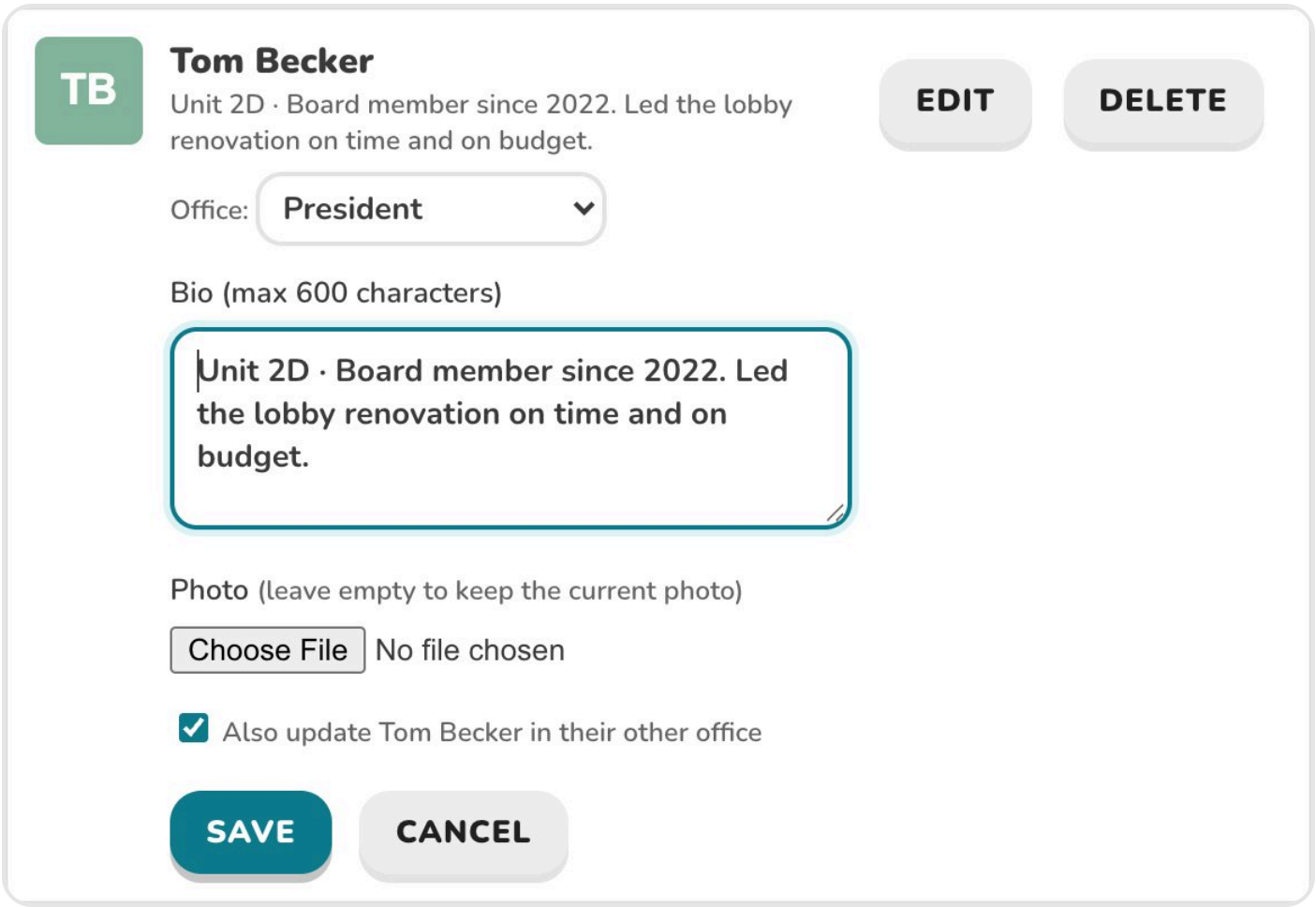
Someone running for more than one office

Each office has its own list of candidates, so a person running for two offices appears on both lists, and their votes are counted separately in each office. You only have to type their details once:

- **In a spreadsheet:** list every office in their **office** cell, separated by `|`, for example `President | Board of Directors`. (One row per office also works; the bio only needs to be on one of the rows.)
- **Typing them in:** add the person to each office by name, with the bio and photo only the first time. Then click **Edit** on that first entry, keep **Also update … in their other office** ticked, and click **Save**. The bio and photo are copied to every office they're running for.

Editing a candidate

Click **Edit** next to a candidate to change their bio or add or replace their photo. If the same person is listed under other offices, keep **Also update** ticked to change them everywhere at once. To correct a name, delete the candidate and add them again before voting starts.

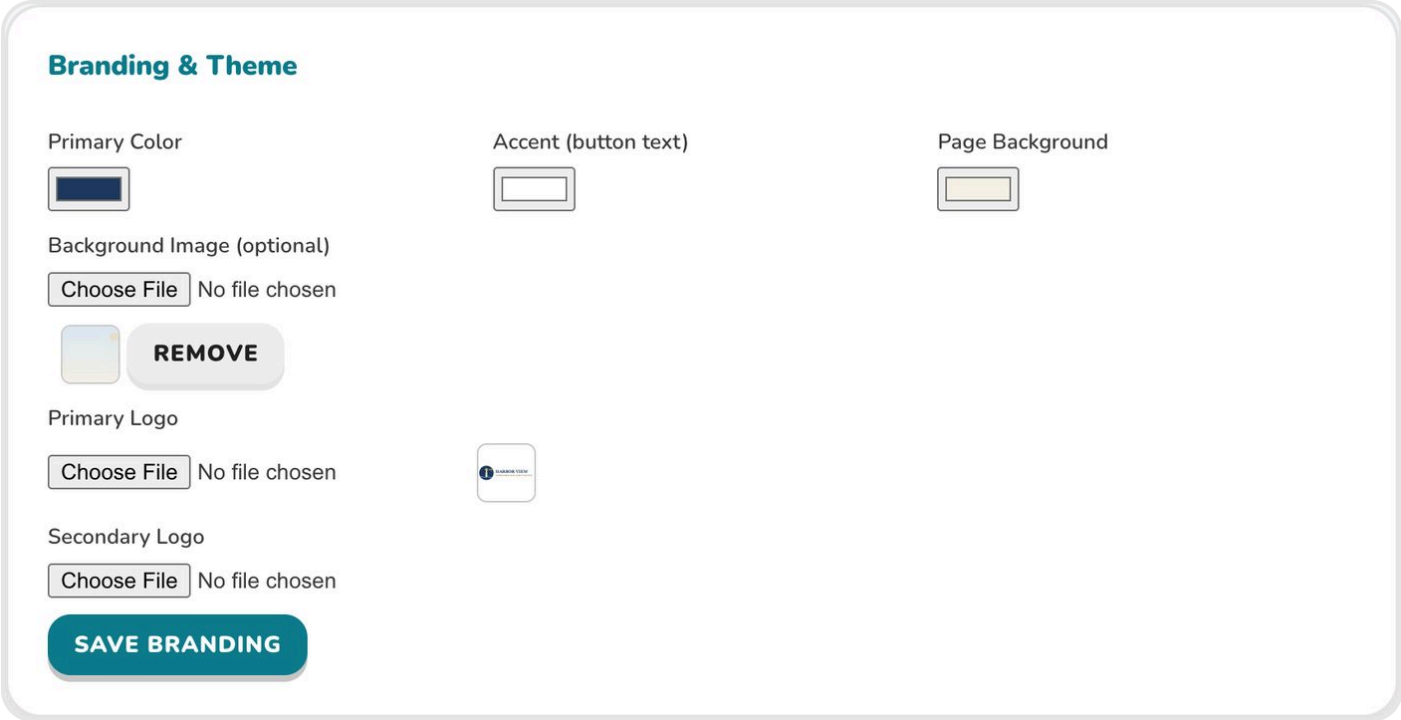


AFTER VOTING STARTS

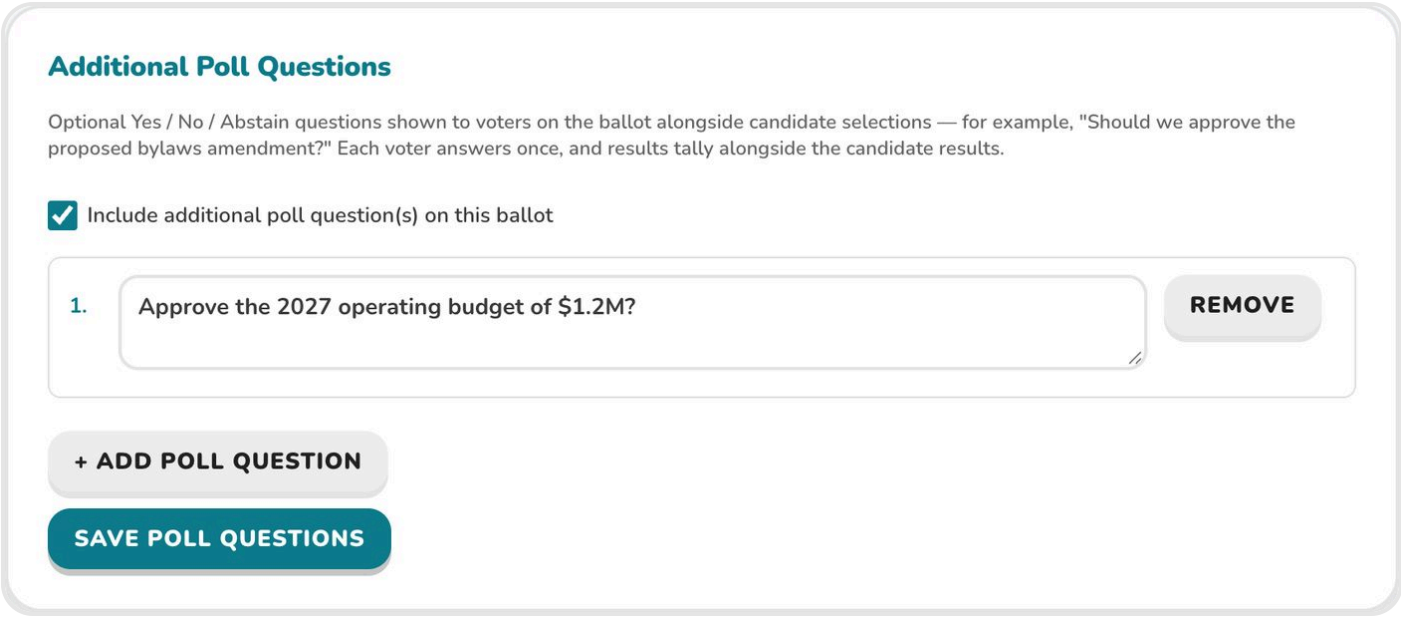
Once anyone has voted, the ballot's shape is locked: you can't add or remove offices, change seats or methods, or move candidates. You can still fix a spelling mistake in an office's name. This keeps every ballot counted against the ballot the member actually saw.

11 Branding & Yes / No questions

Under **Branding & Theme**, set your primary color (headings and buttons), button text color, page background, an optional background image and up to two logos. The ballot, sign-in page and preview all use them.

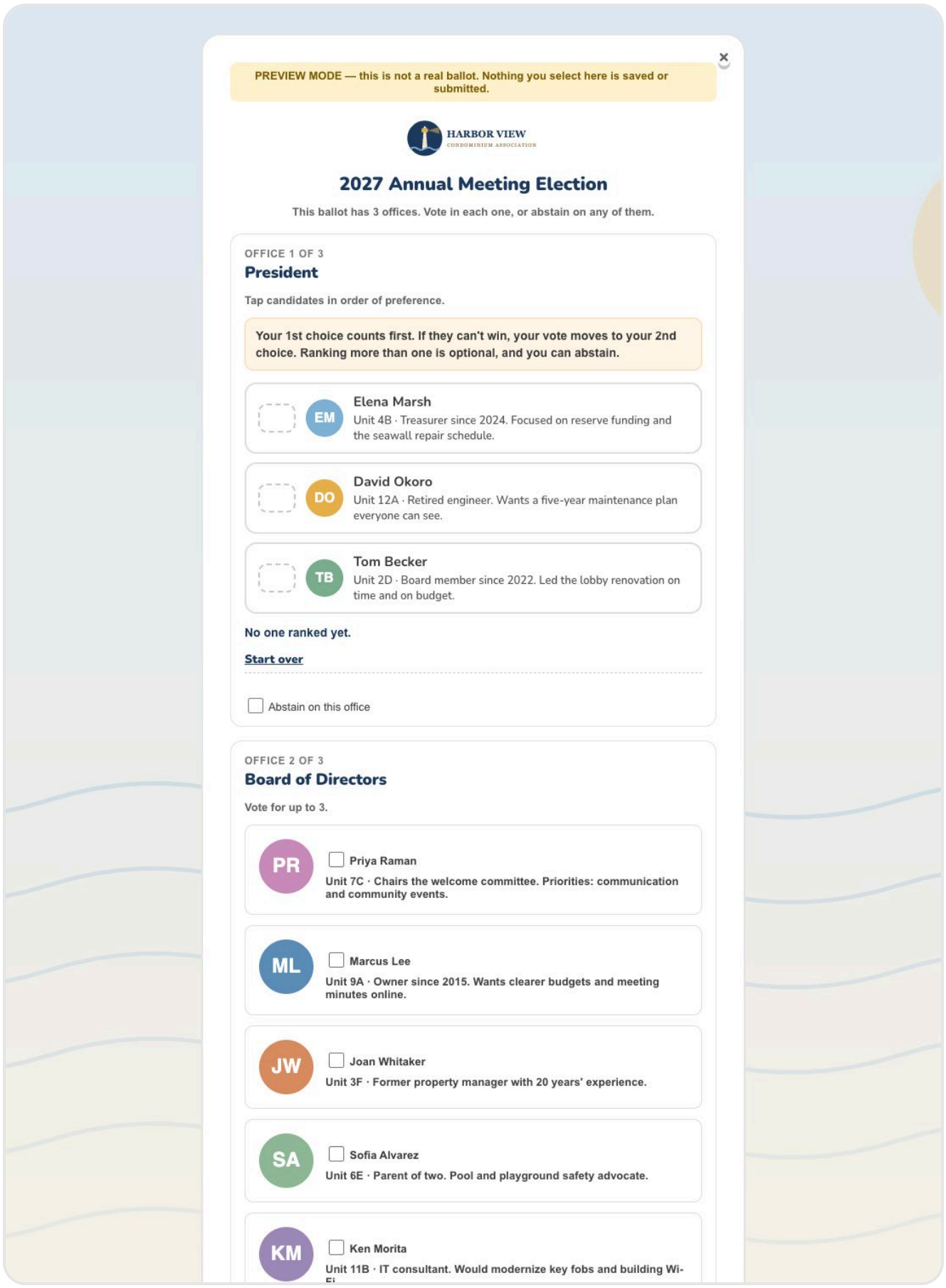


Under **Additional Poll Questions**, add up to 5 Yes / No / Abstain questions, such as "Approve the 2027 operating budget?". They appear after the offices, and members must answer each one.



12 Preview your ballot

Click **Preview Ballot** to see exactly what members will see, with your branding, offices, candidates and questions. You can click through it, and nothing is saved or submitted. It even uses unsaved changes on the page.

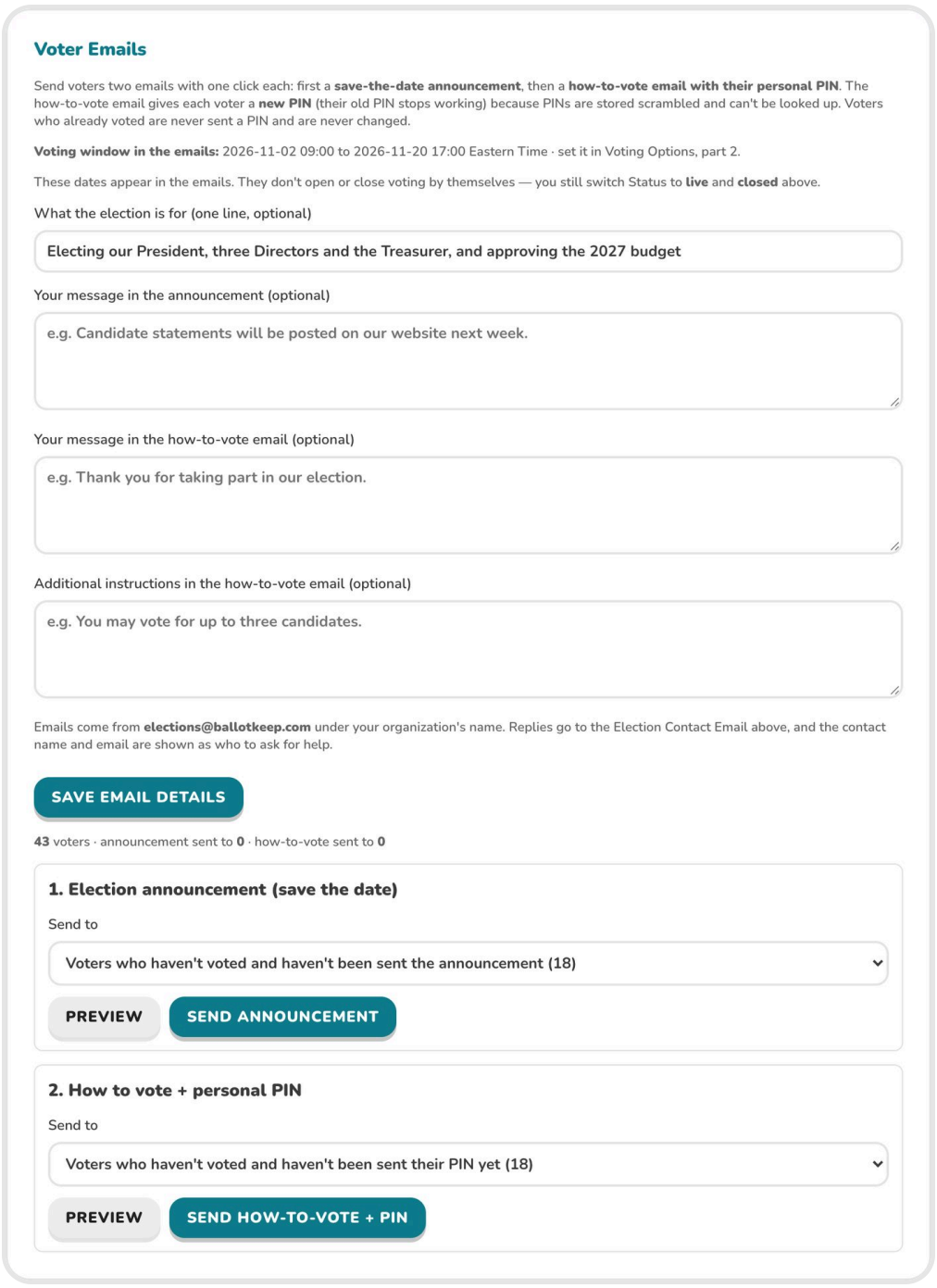

PREVIEW MODE — this is not a real ballot. Nothing you select here is saved or submitted.
HARBOR VIEW
CONDOMINIUM ASSOCIATION
2027 Annual Meeting Election
This ballot has 3 offices. Vote in each one, or abstain on any of them.
OFFICE 1 OF 3
President
Tap candidates in order of preference.
Your 1st choice counts first. If they can't win, your vote moves to your 2nd choice. Ranking more than one is optional, and you can abstain.
EM
Elena Marsh
Unit 4B · Treasurer since 2024. Focused on reserve funding and the seawall repair schedule.
DO
David Okoro
Unit 12A · Retired engineer. Wants a five-year maintenance plan everyone can see.
TB
Tom Becker
Unit 2D · Board member since 2022. Led the lobby renovation on time and on budget.
No one ranked yet.
Start over
Abstain on this office
OFFICE 2 OF 3
Board of Directors
Vote for up to 3.
PR
Priya Raman
Unit 7C · Chairs the welcome committee. Priorities: communication and community events.
ML
Marcus Lee
Unit 9A · Owner since 2015. Wants clearer budgets and meeting minutes online.
JW
Joan Whitaker
Unit 3F · Former property manager with 20 years' experience.
SA
Sofia Alvarez
Unit 6E · Parent of two. Pool and playground safety advocate.
KM
Ken Morita
Unit 11B · IT consultant. Would modernize key fobs and building Wi-

13 Email your voters

1. Write one line about what the election is for, plus optional messages.
2. **1. Election announcement** (save the date): sent any time, with no PIN.
3. **2. How to vote + personal PIN:** each member gets the voting link and a **new** PIN. Send it when you're ready, usually just before voting opens.

Use **Preview** to read each email first. Emails come from **elections@ballotkeep.com** under your organization's name, and replies go to your election contact. Members who already voted are never emailed a PIN.

Text-message PINs: with the add-on on, tick **Also text the same PIN** when you send the how-to-vote email. Members with a mobile number get the PIN and link by text too, and can sign in with their phone number. Use **Preview Text Message** to read it first. Anyone who replies STOP is skipped. The section shows how many texts are left; if they run out, PINs still go by email. Don't have the add-on? Add it from this section ($29 per election, up to 1,500 texts; annual plans can add $99 a year for every election, up to 5,000 texts a year), or email us to turn it on the same day.



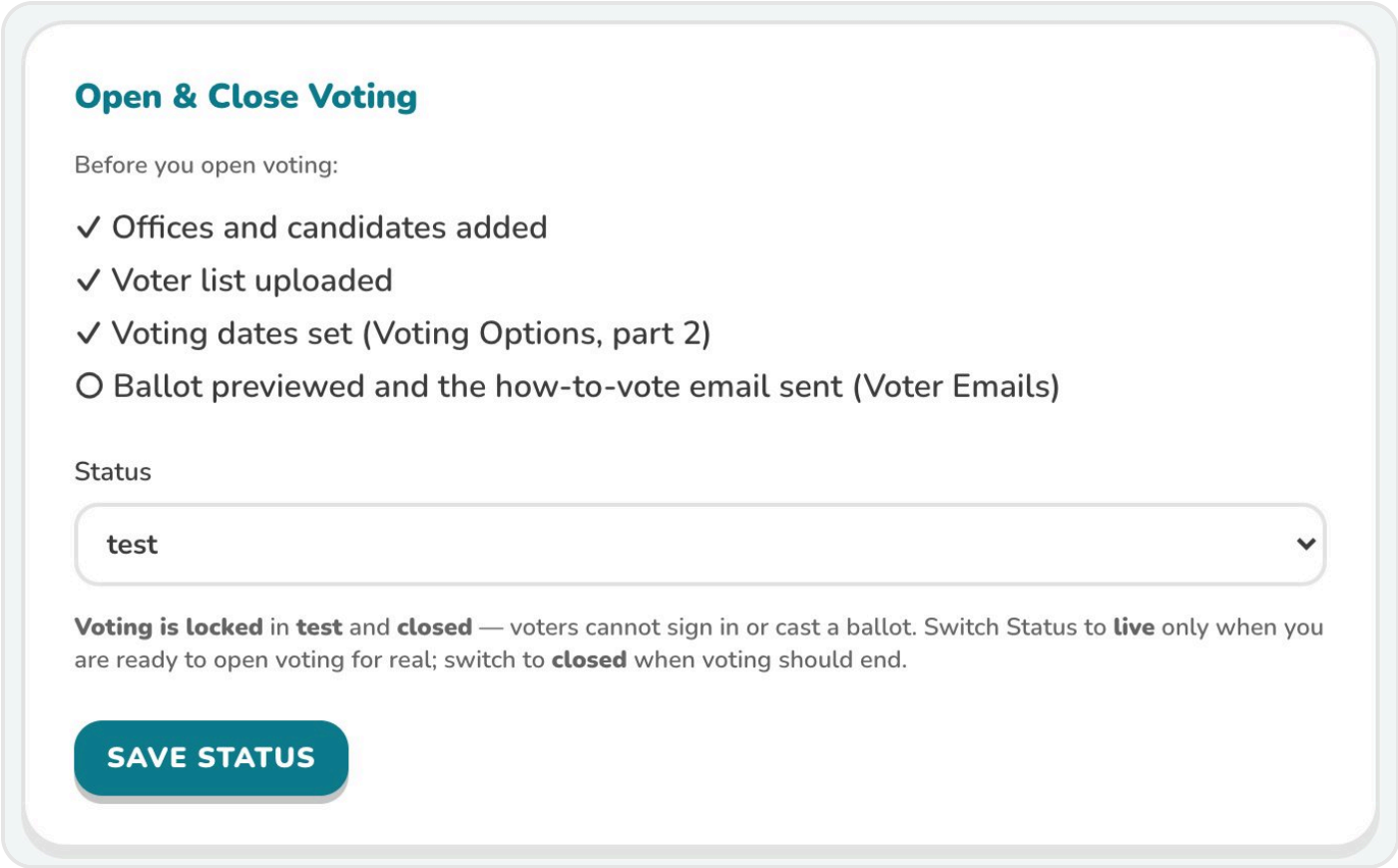
TIP

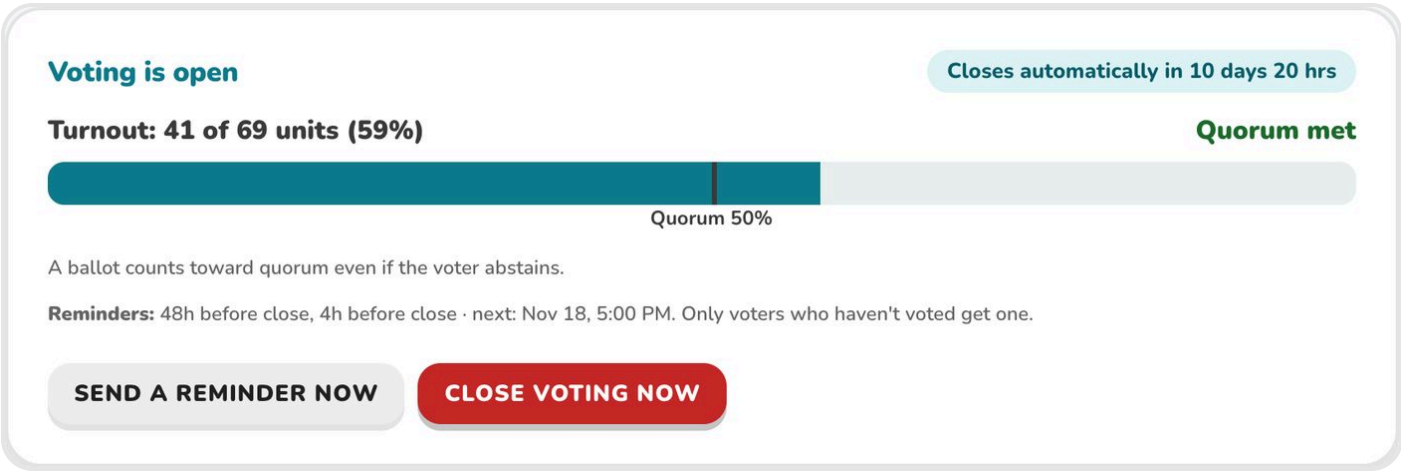
Link the voter guide (ballotkeep.com/guide/voter) in your announcement. It answers most member questions before they're asked.

14 Open voting & watch turnout

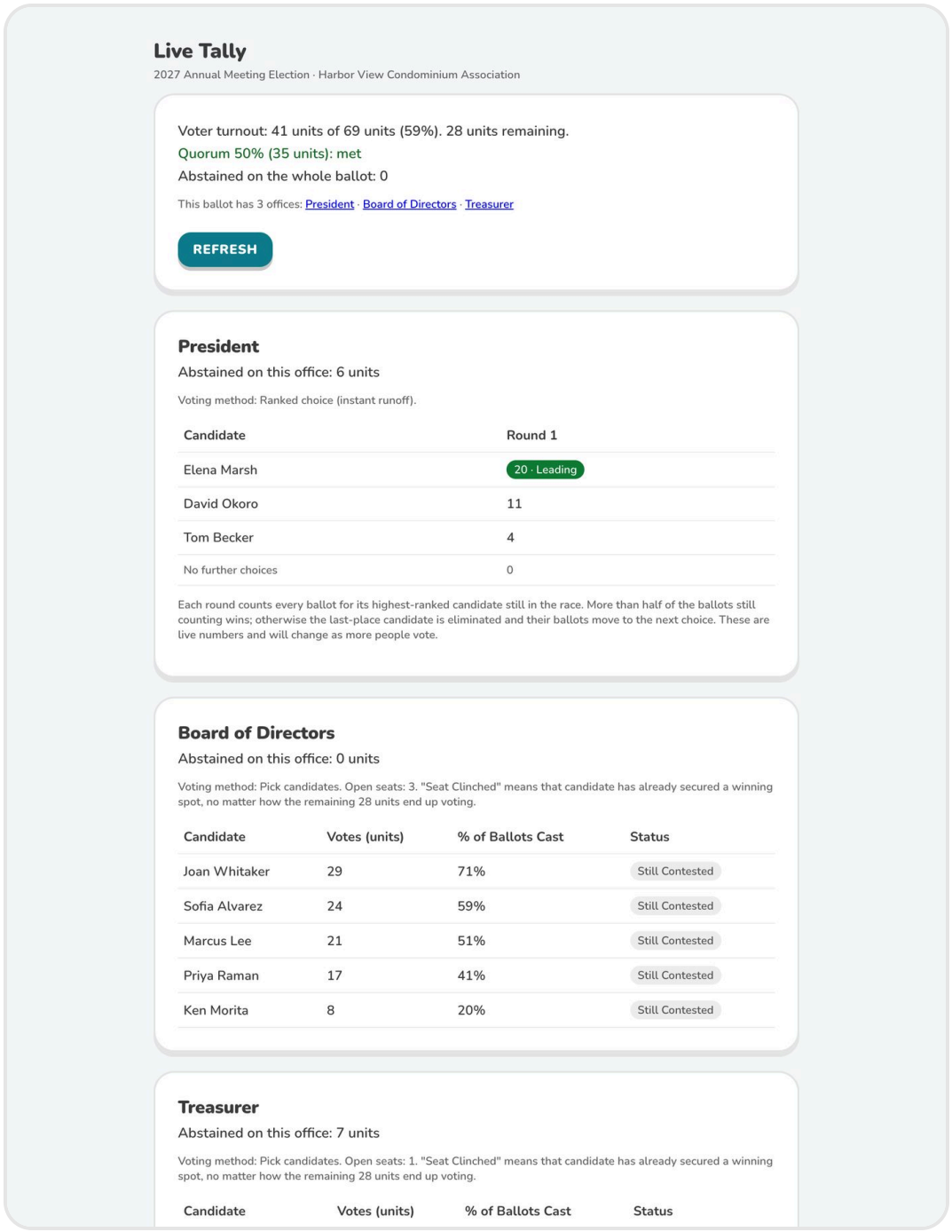
When the ballot is built, previewed and the how-to-vote email is ready, go to **Open & Close Voting** near the bottom of the console. In test mode it shows a short checklist first. Switch **Status** to `live` and click **Save Status**, or let voting open automatically on schedule. The top of the console then shows live turnout, the quorum line, when voting closes, and the next reminder.

- **Status:** `test` (setup, voting locked), `live` (voting open), `closed` (voting over).





Open **Results & Records** for live numbers per office. "Seat Clinched" means a candidate has already won a seat, no matter how the remaining members vote.

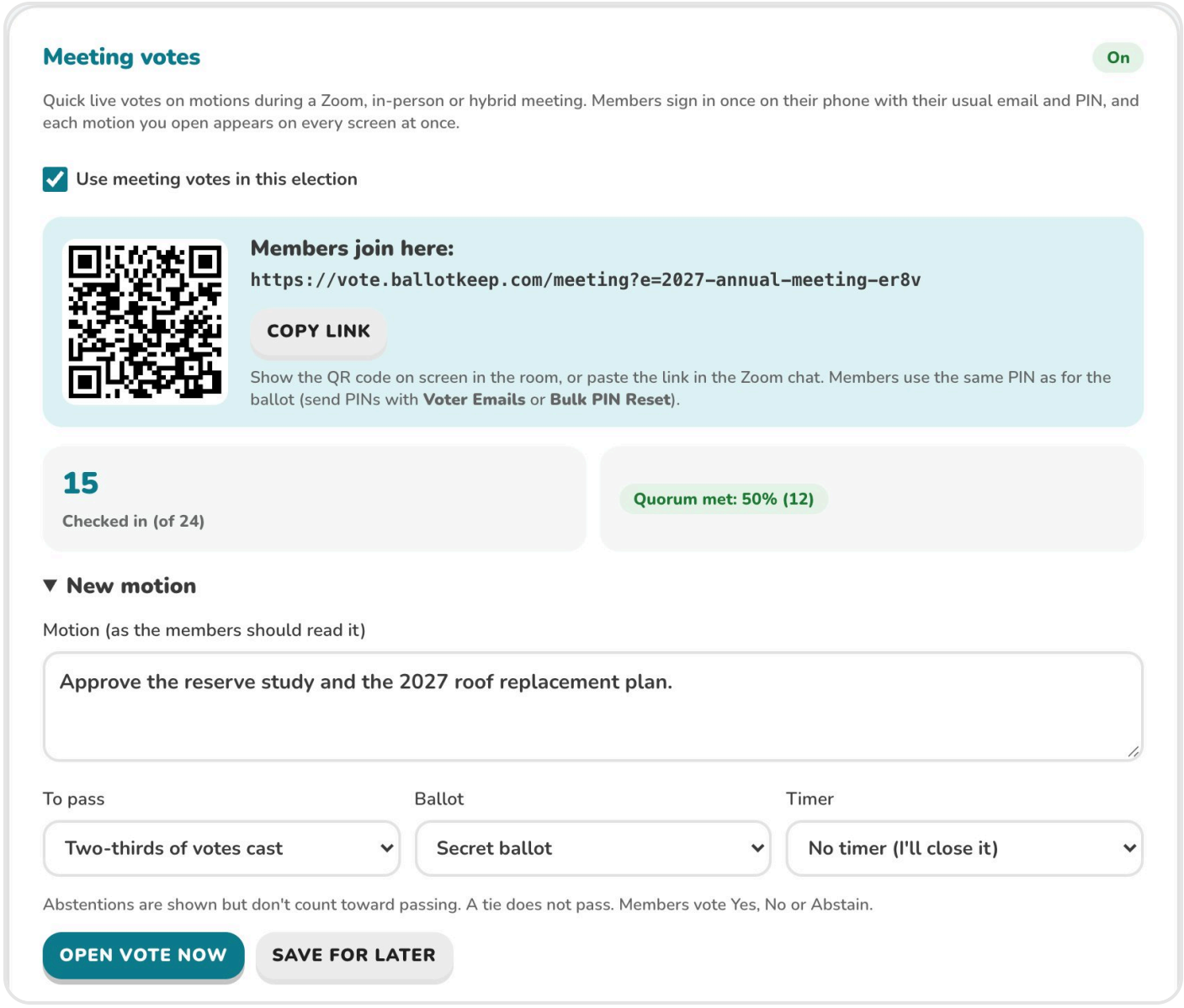


15 Meeting votes

Vote on motions during your meeting, in the room, on Zoom, or both. Members vote on their own phone or computer, and every motion you open appears on every screen at once. Meeting votes is in the admin console and is included in every plan.

Before the meeting

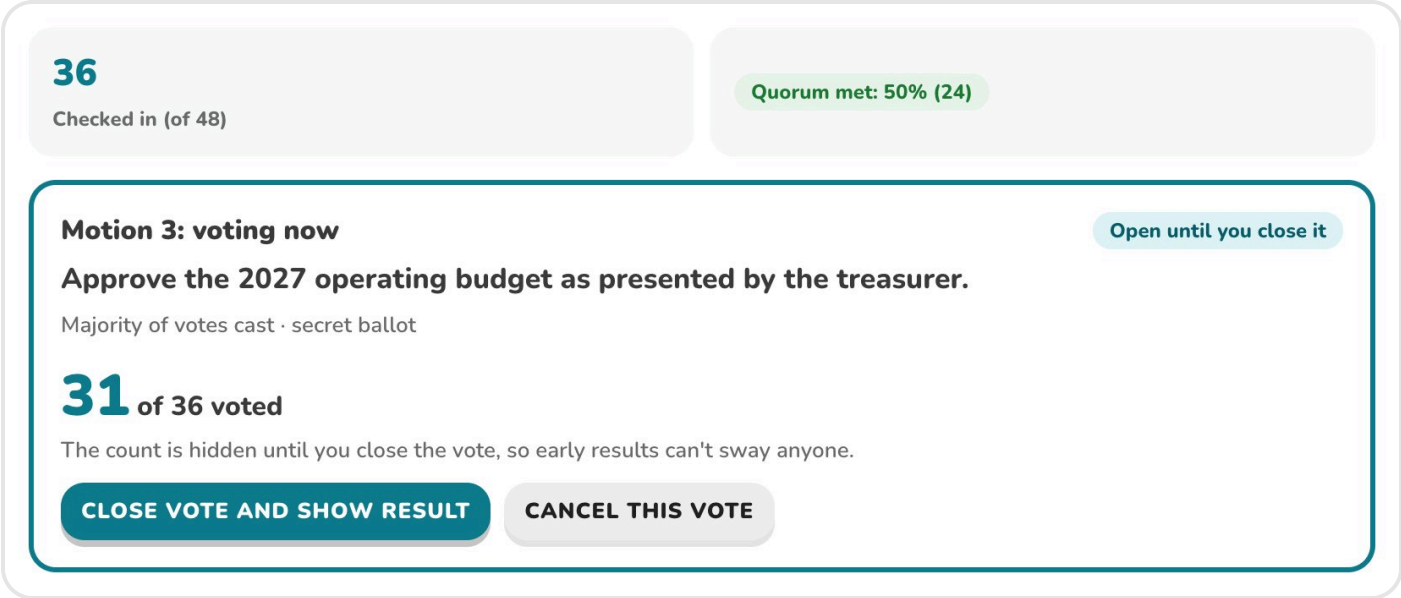
1. Upload your voter list and send PINs (Voter Emails or **Bulk PIN Reset**). Members use the same email and PIN as for the ballot.
2. Under **Meeting votes**, tick **Use meeting votes in this election**.
3. When the meeting starts, set **Status** to `live`.
4. Show the QR code on screen in the room, or paste the link in the Zoom chat. Members sign in once and stay signed in for up to 12 hours.



Each motion

1. Type the motion. Choose **To pass** (majority or two-thirds of the votes cast), **Ballot** (secret ballot or roll call) and an optional **Timer**.

2. Click **Open vote now**, or **Save for later** to prepare motions before the meeting. Only one motion can be open at a time.
3. Watch "X of Y voted". The count stays hidden until you close the vote, so early results can't sway anyone.
4. Click **Close vote and show result**. The result fills the screen for the room or a Zoom screen share. Press Esc or click to go back. Members see the result on their phones too.





GOOD TO KNOW

Abstentions are shown but don't count toward passing, and a tie does not pass. Weighted votes, your quorum setting and approved proxies apply automatically. A proxy holder votes for a member only while that member isn't checked in.

After the meeting

Click **Download votes for the minutes (PDF)** for every motion, its result, attendance and quorum. Click **End meeting** to sign everyone out. Opening, closing and cancelling motions are recorded in the audit log. How anyone voted on a secret ballot is never recorded.

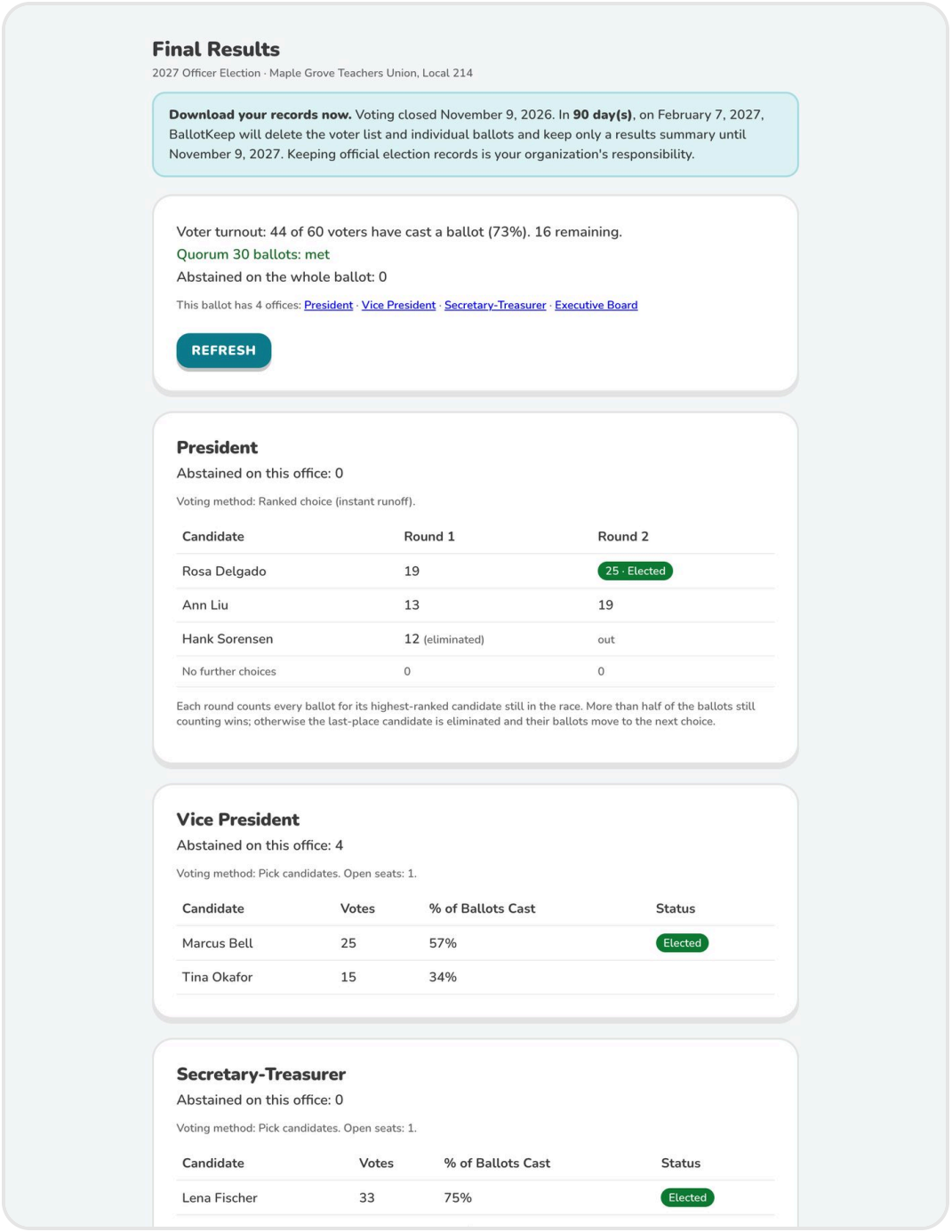
TIP

Start with a practice motion such as "Can everyone see this?" so members learn the screen. Worded a motion wrong? Click **Cancel this vote**. Its votes are thrown away and you can open a corrected one.

16 Close & results

Voting closes at the scheduled time, or when you click **Close voting now**. Then:

- The certified report goes to your secretary and the other recipients automatically.
- **Results & Records** shows the final results for every office, with Elected or Tie marked.
- The ballots are now the official record. **Reset All Votes** no longer works on this election, even if you reopen voting.



17 Records & retention

On **Results & Records**, download:

- **Results (CSV):** totals for every office, round by round for ranked choice.
- **Voter turnout (CSV):** who voted, never how.
- **All ballots (CSV):** every anonymous ballot, one column per office, for a recount or audit.
- **Activity log (CSV):** every admin action, with a tamper-evident integrity check.

To delete an election early, close voting first, then use **Delete This Election** at the bottom of the admin console. Its data is erased. BallotKeep keeps a short record that it was deleted, with who did it and when.

DOWNLOAD WITHIN 90 DAYS

90 days after voting closes, BallotKeep deletes the voter list and ballots and keeps only a results summary. One year after closing, everything is deleted. Your organization is responsible for keeping its official records.

18 Playbooks by organization

Common setups. Always follow your own bylaws first.

HOA / condo association

- Offices: President, Directors (vote for up to N), Treasurer
- Weighted votes by units, if your declaration says so
- Proxies on, with paper proxy forms entered by the manager
- Meeting votes for the budget and other motions at the annual meeting
- Quorum as a % of units, plus a budget question
- Report to the secretary and the management company

Union local

- 8-digit PINs
- Officer slate: President (ranked choice if your constitution allows), VP, Secretary-Treasurer, Executive Board
- Automatic open and close; reminders 2 days and 4 hours before
- Certified report to the recording secretary
- Download all records for your files

Nonprofit board

- One office: "Board of Directors, vote for up to 3"
- Nominations before the ballot
- Yes / No questions for bylaw amendments
- Quorum as a number of ballots
- Secretary gets the report; a co-admin for backup

Club / small group

- Start with the free practice election (5 voters)
- One office, pick 1
- Logo and colors for a friendly feel
- One reminder 1 day before close

SIZE	WHAT USUALLY HELPS
Under 25 voters	Paste emails directly. One reminder is plenty. Watch the voter list and nudge people personally.
25–250	Upload a CSV. Send the save-the-date a week ahead. Use two reminders and set a quorum.
250+	Contact us for a plan. Add a co-admin, send the voter guide link early, and use automatic open and close.

19 Troubleshooting

PROBLEM	FIX
A member never got their email	Ask them to check spam for elections@ballotkeep.com. Check the address in the voter list. Then send the how-to-vote email to "voters who haven't been sent their PIN yet", or reset their PIN.
A member is locked out	Click **Reset PIN** next to their email. That unlocks them, and you give them the new PIN.

PROBLEM	FIX
"Ballots have already been cast, so offices (or candidates) can't be..."	The ballot locks after the first vote: offices and candidates can't be added, removed or renamed (you can still correct an office's name and fix a candidate's bio or photo). If those were practice votes, switch Status to `test`, use **Reset All Votes**, then edit.
The spreadsheet import says "Nothing was added"	One or more rows need fixing; they're listed by row number (row 1 is the headings). Fix them, save as CSV again and choose the file again. If it can't find the names, check that row 1 says **name**, **bio** and **office**, in English.
Reset All Votes or **Delete** is refused	Reset only works on practice votes: the election must be in `test` and voting must never have closed. Deleting needs voting closed first. This protects your official results.
Can't switch to live	Read the message under Save Settings. Usually the plan isn't active yet or there are more voters than the plan allows.
Wrong closing time	Change the time in Voting Options and save. Reminders adjust to the new time.
A member can't join Meeting votes	Check that **Status** is `live` and Meeting votes is ticked. Members use the same email and PIN as the ballot. If they've lost their PIN, click **Reset PIN** and give them the new one.
A motion was worded wrong	Click **Cancel this vote**. Its votes are thrown away. Then open a corrected motion.
Lost your phone or authenticator	Use a recovery code, or ask a co-admin to send you a new invite link.

Still stuck? Email kingsley@castleknight.org or call 413-200-9869.

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