

#### ▲ REACH

## Reach App 101

## ADDING SOMEONE TO YOUR REACH



### Go to My Reach (bottom, middle)

Import

Add to

Your

Reach

Netwo

Voter

Registrati

Tab

### Click "Import" button

**Contact in** 

your phone

	💼 #TakeBackFL with FL Dems 🦉						
	Network	History	Voter Re	gistration			
	23 people			Sort By First	Name 🗸		
	≡ Filters 8	& Prefs 🗸	🔮 Reach A	dd 🔮 Vote	r 🐂 Den		
	Q Search by name, address, or contact info				info		
	Abigayil Bhatyah Yisrael-israel 😵 Friend						
	Abigayil Yisrael 😵 Friend						
	Brandon Joseph Wolf 😵 Friend						
	Devan Wilfrad Famu Naacp Pres 😵 Friend Reach Add Karen Beth O'shea 😵 Friend Voter 🌪 Dem +1 More						
	Kristal Anne Hance 😵 Friend						
Fol	Voter NPA						
ti Ste	Kristellys Maria Estanga 😵 Family						
	Home	Q Search	My Reach	Rankings	Chat		

## Click

**Contact in** 

your phone

#### "From Phone Contacts"

Import

Add to

Your

Reach

Netwo

Voter

Registrati

Tab

	= #TakeBackFL with FL Dems					
	Network History Voter Registration					
	23 people Sort By First Name 🗸					
	➡ Filters & Prefs ➤ ▲ Reach Add ▲ Voter ➡ Der					
	Q Search by name, address, or contact info					
	Abigayil Bhatyah Yisrael-israel 😵 Friend					
	Abigayil Yisrael V Friend					
	Brandon Joseph Wolf 😵 Friend					
	Devan Wilfrad Famu Naacp Pres 💱 Friend					
	Karen Beth O'shea 😵 Friend					
	X Network Import					
S	From Phone Contacts					
	From Other Reach Campaigns					

Select contacts you want to import

**Click: "Search for Matching Voters"** 

Only registered voters will be able to be matched



4:52		ul 🕈 🕞
×	Your Contacts Last updated 7 days ago	Ċ
Q Type to Sea	arch	
9 of 1,638 selecte	ed	Clear Selection
Vol (904) 923-6172	1	
Alicia Marie Co (321) 503-2488	bker	
Alina Herrera ( (661) 406-7167	Woodstock GA	
Alison Moranc (813) 766-9872		
Alison Tant (850) 251-6040	)	
Allahandro Br (561) 629-0420	adford	~
Allen Byrd (904) 591-7633		<b>~</b>
Allie Blanchet (410) 948-9873	te 3	
Allie Braswell (407) 227-4729	)	
Allie Brown		
Sea	arch for Matching Vot	ers

Reach will talk to VAN to look for matching voter files that match the contact in your phone.

Searching for voters in this campaign that match your selected contacts

0 of 9

**Contact Import Search Results** 

×



#### **Great Matches:**

VAN will find great matches for some. You will select the best match using what you know about the person.

#### **Multiple matches:**

You can go in and narrow down the search for that person by entering additional or revised information and search for matching records again

#### **No Matches:**

the person is not showing up as a registered voter.

Import +

Match

Contact in your phone

Add to Your Reach Netwo rk



# Click on someone you want to **add to your network** on Reach.



X

Select more contacts

Q Type to Search

፰ Filters & Prefs ∨

Abigayil Yisrael

(904) 514-7555

Alana Greer

Alex Storer

Frrc (814) 881-0344

(305) 753-9393

Alison Morano

(813) 766-9872

(561) 629-0420

Allahandro Bradford

**Contact Import Search Results** 

To Do

Done

2 of 11

Gre

I Pause for now

Matches

★ Great Matches

★ Great Matches

★ Great Matches

★ Great Matches

✓ Added





С 0

ð

Som

Adding

Step by Step:

After you review and match your contact,

Import

Click: Add as a new person, click "Continue" 1.

Add to

Your

Reach

Network

Voter

Tab

2. **Click: Add to My Network** 

**Contact in your** 

phone



## **Thank You!**

## Link to FAQs https://flade.ms/reachfaq

Questions? reach@floridadems.org



#### ▲ REACH

## Reach App 101

## VOTER REGISTRATION FROM MY REACH



### Voter Registration from My Reach

Go to My Reach

#### **Click on your contact**





#### 🔮 Reach Add 🔵 **Start Voter Registration** Contact Info Q Location Florida Dems 2023 Survey Did they sign the abortion petition when asked? Their profile detail will open with survey questions Are they already enrolled in VBM? **Click the "Voter Registration" Tab** Yes Not sure No Did they submit their VBM form? Do they seem like they would Add to Voter Junteer to help with FL Dems? Your Follow **Contact in your** Registration Import Reach the phone Netwo Steps d they submit their voter Tab **16** A My Reach

Corinna Cm Intensive

YES

YES NO

YES NO

NO

VEC

ul.

NO





#### **Date of Birth**

#### You will need to put in their date of birth.

#### Why?

This is the most important piece of information that the Voter Database will use once their voter registration form has been processed to match your Reach Contact to their processed VR form.

If you can't get their date of birth, insert January 1, 1900 as the default.

**Click: Next** 



#### **Choose how they will receive the** registration form

#### **Options for Voter Registration:**

- **Online Portal: Send them the link to** www.RegisterToVoteFlorida.Gov to their phone or email (We will choose this now)
- If you have a paper form with you, leave 2. the form with them and click Paper Form
- 3. **PDF Form (English/Spanish): Send them** the link to the PDF form that they can print and send on their own.



#### Paper Form

Provide a paper form for the voter to complete. Make sure the form gets mailed to or dropped with the County Supervisor of Elections.

Requirements: Current and valid Florida driver's license number (FL DL#) or Florida identification card number (FL ID#). If you do not have a FL DL# or FL ID#, then you must provide the last four digits of your Social Security number (SSN)

#### PDF Form

Send a link to a PDF form which the person can print, complete, and mail or drop off on their own. You'll send them reminders along the way.

Requirements: Current and valid Florida driver's license number (FL DL#) or Florida identification card number (FL ID#). If you do not have a FL DL# or FL ID#, then you must provide the last four digits of your Social Security number (Sett)

# Select how you will send them the online link

#### **Click: Send link via messaging**

Next

#### **Online Portal**

Use the state's online portal to register. This can be done on your device right now, or you can send a link so the voter can complete the form later.

Requirements: Current and valid Florida driver's license number (FL DL#) or Florida identification card number (FL ID#). If you do not have a FL DL# or FL ID#, then you

(FL ID#). If you do not have a FL DL# or FL ID#, then you must provide the last four digits of your Social Security number (SSN)

Learn more about this voter registration method.

Online Form Send link via Submitted messaging

Send link via email

Online Portal

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Learn more about this voter registration ) method.



# Send them the VR form to their phone

Reach will switch over to your messaging app on your phone and send the person a message with a scripted message. You can revise this message in your message app.



#### You did it!

You've successfully initiated the voter registration process with your contact.

## You can view their profile by going to My Reach and clicking on their name.

You will see that the voter registration process is tracked and it will remind you in 3 days to follow up





## **Thank You!**

## Link to FAQs https://flade.ms/reachfaq

Questions? reach@floridadems.org



#### ▲ REACH

## Reach App 101

### ADDING AN UNREGISTERED VOTER TO REACH



## Adding Someone while Community Canvassing

Canvassing / In community Add someone through the <u>Search</u> option



### Adding someone: 2. While canvassing in the community



### Adding someone: 2. While canvassing in the community





0

**Adding Som** 

Step by Step:

X Add Someone New	Add
Contact Information	~
Mobile ~ +1 (954) 804-9010 Share with #TakeBackFL with FL Dems	<b>→</b>
Add phone number	_
Home ~ example@domain.com Share with #TakeBackFL with FL Dems	
Add email address	
Tags	<u> </u>
Relationship	
父 Add to My Network	
Florida Dems 2023 Survey	<u> </u>
Did they sign the abortion petition VES	NO

### Adding someone: 2. While canvassing



#### Fill in the required information: - Full Name, Zip Code, State

AND: Get their phone number or email address to send them the link to register online (and to continue engaging with them)

Click: Add to My Network + Add



### Adding someone: 2. While canvassing



#### Let's get Person registered to vote!

×

Se

Person 45 has been added to Reach. Reach can also help you register people to vote. Is Person ready to register to vote?

🖄 Register to Vote

Skip Voter Registration

#### **Click: Register to Vote**

#### **Date of Birth**

#### You will need to put in their date of birth.

#### Why?

This is the most important piece of information that the Voter Database will use once their voter registration form has been processed to match your Reach Contact to their processed VR form.

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**Click: Next** 



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Next

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(FL ID#). If you do not have a FL DL# or FL ID#, then you must provide the last four digits of your Social Security number (SSN)

Learn more about this voter registration method.

Online Form Send link via Submitted messaging

Send link via email

Online Portal

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#### You did it!

You've successfully initiated the voter registration process with your contact.

## You can view their profile by going to My Reach and clicking on their name.

You will see that the voter registration process is tracked and it will remind you in 3 days to follow up





## **Thank You!**

## Link to FAQs https://flade.ms/reachfaq

Questions? reach@floridadems.org



#### **●** REACH

## Reach App 101 FOLLOW-UPS



Very important for us to keep engaging with our network.

Especially important: FOLLOW UP to see if they have submitted their voter registration form so you can mark them as completed.

Thankfully, Reach will help us with following up by creating a workflow for us :)

Reach will notify you on its own...



### **Reminder Notification!**



#TakeBackFL with FL Dems44m agoVoter Registration To DosYou have 3 voter registration reminders to send



#TakeBackFL with FL Dems	🐠 Kr
<	-
	Vincent Wilkinson
Met while	e organizing 🖉 💽 🕓
🖹 Survey	Voter Registration
Contact Info	Online Portal
♀ Location (3)	Need more information? Find answers here.
▲ Voter Registration	Reminder due 3 dayt ago
Tags	Take the next step
Reach Add +	Online Form Submitted
) Last Reached 6 days ago by you	Record new action
	Link sent via messaging October 11, 2023
	Process Started
	October 11, 2023
	The beginning of time



× Choose a Script					
😐 Are you registered to vote in FL?	0				
Online VR Follow Up #1					
Online VR Follow Up #2	0				
Paper VR Follow Up #1	0				
Paper VR Follow Up #2	0				
Send Link: RegisterToVoteFlorida.Gov	0				
📁 VBM Request 1: First Contact	0				
Message Preview: Hey Vincent! Just following up to see if you've been able to submit your voter registration form online? Let me know if you need any help with it.					
Start with an empty message					
Use this script					



Voter Registration To Dos You have 3 voter registration reminders to send



A)

)

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![](_page_40_Picture_2.jpeg)

![](_page_40_Picture_3.jpeg)

## **Thank You!**

## Link to FAQs https://flade.ms/reachfaq

Questions? reach@floridadems.org

![](_page_42_Picture_0.jpeg)

#### ▲ REACH

## Reach App 101

## OVERVIEW OF VR PROCESS

![](_page_42_Figure_4.jpeg)

## My Reach & Search

- "My Reach" Screen:
  - Your Network
  - Interaction History
  - Voter Registration interactions, reminders

#TakeBackFL with FL Dems	Kristellys E.	
Network History	Voter Registration	
12 people	Sort By First Name 🗸	
≅ Filters & Prefs ♥	🗶 Voter 🐂 Dem 🛛 😵 Friend	
Q Search by name, address, or conta	act info	
Devan Wilfrad Famu Naacp Pres 🛛 ¥ F	riend	
E Reach Add		
Karen Beth O'shea 😲 Friend		
Kristellys Maria Estanga 🖇 Family		
🗶 Voter 🐂 Dem		
Niki 🖞 Friend		9:41
E Reach Add		
Niko 😵 Friend		
Person name 😵 Coworker		1
E Reach Add		Find voters by name
Phillip Jerez Y Coworker	Import	or location.
🗶 Reach Add		
Home Search My Reach	Rankings Chat	Name
		Location or Address

- Search function:
  - find someone in voter database
    - + add them to your network
  - reach out about registering to vote

### **My Reach**

#### "My Reach" Screen:

- Your Network
- Interaction History
- Voter Registration interactions, reminders

#TakeBackFL with FL De	ms	Kristellys E.				
Network Hist	ory	Voter Registration				
12 people		Sort By First Name 🗸				
≅ Filters & Prefs ∨	n Add 🖉	Voter 🍖 Dem 😵 Friend				
Q Search by name, address,	or contact	info				
Devan Wilfrad Famu Naacp F	Pres 😵 Frie	nd				
Karen Beth O'shea 💱 Friend	Karen Beth O'shea 😵 Friend					
Kristellys Maria Estanga 😲 F	Kristellys Maria Estanga 🚏 Family					
Niki 😵 Friend						
Niko 😵 Friend						
Person name § Coworker						
Phillip Jerez        § Coworker						
Home Search	My Reach	Rankings Chat				

### Search

#### **Search function:**

- find someone in voter database
   + add them to your network
- reach out about registering to vote

9:41	xeBackFL with FL Dems	≎ ■ + <u>2</u>
F	ind voters by or locatior	name 1.
Nan		
Loca	ation or Address	
	Q	
<b>A</b> Home	Q 🕸 Search dy Reach Ra	nkings Chat

### **Getting Started: Voter Registration**

Where to find unregistered voters?

1. Your phone contacts

#### Through the **Import** option

- 2. Canvassing / In community
- Through the **Search** option

= #TakeBackFL with FL Dems					
Network	History	Voter Re	gistration		
23 people			Sort By First N	lame 🗸	
≢ Filters	& Prefs 🗸	E Reach Ac	dd 🔮 Voter	╆ Den	
Q Searc	h by name	, address, o	or contact ir	nfo	
Abigayil	Bhatyah Y 🐂 Dem	israel-israe	। <sup>थ</sup> Friend		
Abigayil	Abigayil Yisrael V Friend				
Brandon	Brandon Joseph Wolf 😵 Friend				
Devan Wilfrad Famu Naacp Pres 💱 Friend					
Karen Beth O'shea VFriend					
Kristal Anne Hance V Friend					
Kristellys Maria Estanga 😵 Family					
<b>h</b> Home	Q Search	My Reach	Rankings	Chat	

![](_page_47_Figure_1.jpeg)

## Voter Registration: Community canvassing

Where to find unregistered voters?

**Type in** 

Name,

City or

Zip Code

2. Canvassing / In community

Through the <u>Search</u> option

Search

![](_page_48_Figure_5.jpeg)

#### Voter Registration: 1) From your contacts

![](_page_49_Figure_2.jpeg)

#### Voter Registration: 2) From canvassing

![](_page_49_Figure_4.jpeg)

### Voter Registration: Community canvassing

# We couldn't find anyone based on your search.

Make sure all words are spelled correctly

Try more general keywords

Remove filters you may have applied

Register a new voter

![](_page_50_Figure_7.jpeg)

## **Thank You!**

## Link to FAQs https://flade.ms/reachfaq

Questions? reach@floridadems.org

![](_page_52_Figure_0.jpeg)

#### Add someone to your network $\rightarrow$ Start VR process

### FIRST: Let's add a registered voter to Reach

### so we can look at the Import + Match process

## **The Search Function**

#### **Search function:**

- find someone in voter database
  - + add them to your network
- reach out about registering to vote

#11	akebackFL with FL Dems	-
F	Find voters by name or location.	Ð
Na		
Loc	cation or Address	
	Q	
*	Q ± ii	

# **PAUSE & REWIND:** What if you want to add someone you met while canvassing?

Let's pause here.

From here, it's the same process for voter registration for anyone you add on Reach. Whether you add them from you personal phone contacts or canvassing.

So, let's go back and add someone we met while canvassing in the community.

We will come back to the start of the Voter Registration process where we left off.

\*Refer to the REACH 101: Adding Someone to Your Reach video if needed\*

Very important for us to keep engaging with our network.

Especially important: FOLLOW UP to see if they have submitted their voter registration form so you can mark them as completed.

Thankfully, Reach will help us with following up by creating a workflow for us :)

Reach will notify you on its own...

![](_page_55_Picture_6.jpeg)

### ...and, we're back to this step! Date of Birth

#### You will need to put in their date of birth.

#### Why?

This is the most important piece of information that the Voter Database will use once their voter registration form has been processed to match your Reach Contact to their processed VR form.

If you can't get their date of birth, insert January 1, 1900 as the default.

**Click: Next** 

×	Register to Vote	Next
(i) To to con dat	We need a little more information accurately match this person's informa the voter file after they've registered, p nfirm their registration state, zip code, te of birth.	X Ition lease and
Date	of Birth	
Ja	anuary 1, 1900	
Addre	255	
123 Tal	N Martin Luther King Jr Blvd. Iahassee, FL 32301	

![](_page_56_Picture_8.jpeg)

#### **Choose how they will receive the** registration form

#### **Options for Voter Registration:**

- **Online Portal: Send them the link to** www.RegisterToVoteFlorida.Gov to their phone or email (We will choose this now)
- If you have a paper form with you, leave 2. the form with them and click Paper Form
- 3. **PDF Form (English/Spanish): Send them** the link to the PDF form that they can print and send on their own.

![](_page_57_Figure_6.jpeg)

#### Paper Form

Provide a paper form for the voter to complete. Make sure the form gets mailed to or dropped with the County Supervisor of Elections.

Requirements: Current and valid Florida driver's license number (FL DL#) or Florida identification card number (FL ID#). If you do not have a FL DL# or FL ID#, then you must provide the last four digits of your Social Security number (SSN)

#### PDF Form

Send a link to a PDF form which the person can print, complete, and mail or drop off on their own. You'll send them reminders along the way.

Requirements: Current and valid Florida driver's license number (FL DL#) or Florida identification card number (FL ID#). If you do not have a FL DL# or FL ID#, then you must provide the last four digits of your Social Security number (Sett)

# Select how you will send them the online link

#### **Click: Send link via messaging**

Next

#### **Online Portal**

Use the state's online portal to register. This can be done on your device right now, or you can send a link so the voter can complete the form later.

Requirements: Current and valid Florida driver's license number (FL DL#) or Florida identification card number (FL ID#). If you do not have a FL DL# or FL ID#, then you

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Learn more about this voter registration method.

Online Form Send link via Submitted messaging

Send link via email

Online Portal

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Learn more about this voter registration ) method.

![](_page_59_Picture_5.jpeg)

# Send them the VR form to their phone

Reach will switch over to your messaging app on your phone and send the person a message with a scripted message. You can revise this message in your message app.

![](_page_59_Figure_8.jpeg)

#### You did it!

You've successfully initiated the voter registration process with your contact.

## You can view their profile by going to My Reach and clicking on their name.

You will see that the voter registration process is tracked and it will remind you in 3 days to follow up

![](_page_60_Picture_5.jpeg)

![](_page_60_Picture_6.jpeg)

![](_page_61_Picture_0.jpeg)

#### ▲ REACH

## Reach App 101

## NEIGHBOR TO NEIGHBOR PROGRAM

![](_page_61_Figure_4.jpeg)

### Final Note: Adding a New Person on Reach + VAN

#### Any <u>Reach Adds</u> will either be:

- **<u>Created</u>** in VAN's MyCampaign
  - This is an unregistered voter
- Matched to your VAN's MyVoter database
  - This is a registered voter
- Survey Responses and Contact Actions for that person = sync to their My Campaign record.

![](_page_62_Picture_7.jpeg)

## **Thank You!**

## Link to FAQs https://flade.ms/reachfaq

Questions? reach@floridadems.org

# LOCAL CAMPAIGN SURVEY QUESTION

![](_page_65_Picture_0.jpeg)

![](_page_65_Picture_1.jpeg)

#### Search Screen: Type in your street <u>name. city. FL</u>

#TakeBackFL with FL Dems

Kristellys E.

UPDATE THIS SCREENSHOT if you're going to update the next one. To show same

![](_page_65_Picture_6.jpeg)

Click the magnifying glass. All voters on your street will be listed

![](_page_65_Picture_8.jpeg)

Show : 1) how to sort addresses by numerica order 2) the houses you order 2) the house you

# cuscholds. We shot Kimberly Ar knock those. 205 N Deliview Dr, Tallahassee, FL 32303 Voter Rep

William Milton Adkins, III 75 - 84 Yea + Register a new voto

Search

Step outside & canvass! Click on each person as you canvass and record their responses accordingly on the survey inside their profile.

Click < arrow to go back to list and continue canvassing

Your response will be recorded in VAN

![](_page_66_Figure_0.jpeg)

#### Are they already enrolled in VBM?

## **Thank You!**

## Link to FAQs https://flade.ms/reachfaq

Questions? reach@floridadems.org

# **STEP BY STEP** PROCESS TUTORIAL **STARTS HERE**

![](_page_69_Figure_0.jpeg)

![](_page_69_Picture_1.jpeg)

**Contact in your** 

phone

#### **Voter Registration Tab**

Now that you have added their address,

You can go back to the Voter Registration Tab and click on "Start Voter Registration"

Import

Add t

Your

Reach

Netwo

Voter

Registration

Tab

	<	•		
	Corinna Cm Intensive			
	Ereach Add			
	Contact Info 💡 Location 🖄 Vote	r Registration		
	Register Corinna to vo	ote		
	<b>+</b>			
	Start Voter Registration	J		
Follow the Steps				
	A Q 10 II	Chat		