HART intercivic

eSlate Electronic Voting System

BALLOT NOW SOFTWARE TRAINING MANUAL

BOSS 2.8 Compatible
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INTRODUCTION

What is Ballot Now?
The Ballot Now software application manages paper ballots for an election using Hart InterCivic’s eSlate Electronic Voting System. Ballot Now derives ballot information for an election from the election data on a Mobile Ballot Box (MBB) created with the Ballot Origination Software System software application (BOSS)™ and delivers cast vote records (CVRs) for the election on the same election’s MBB(s) to the Tally™ application for tabulation.

This Document
This Document is a training manual designed to guide operator training, and it is meant for use in conjunction with the Ballot Now Operations Manual. This training manual is meant for both initial training with Hart InterCivic training specialists, and as a reference to supplement the operations manual once training is complete.

Course Objectives
Through this course the trainee will:
- Create paper ballots using BOSS-generated MBBs.
- Run voted paper ballots through the Ballot Now scanner,
- Resolve unresolved contests,
- Save the scanned cast vote records back to the original election MBB,
- Prepare the cast vote record for Tally vote-tabulating software.

Take Note:
- All steps that refer to a button or menu on the Ballot Now screen have the button in bold (i.e.: Save, Close, OK).
- All steps that refer to a key on the keyboard have the key underlined (i.e.: CTRL, Shift, Enter).
- All steps that refer to a mouse click have the word(s) italicized (i.e.: click, right click, double click). The word click refers to a left click.
- A ❯ refers to either a cross-reference within the Training Manual that contains more information regarding the topic or a cautionary note.
- For Tips & Tricks see page 34. For a Glossary of Terms see page 29.
eslate Data Flowchart

BOSS
Software that creates the ballot database and saves it to a Mobile Ballot Box (MBB).

Ballot Now
Software for paper ballot voting. Ballot Now uses a BOSS MBB to print, scan, image, and record ballots, and to save Cast Vote Records.

Tally
Software that reads Cast Vote Records from MBBs used on Ballot Now and the eslate PVS. Tally counts votes and produces election reports.

eslate
Hardware for in-person electronic voting. The eslate Precinct Voting System (PVS) uses a BOSS MBB to present ballots and to save Cast Vote Records. PVS includes IBCs, eslates, and Disabled Access Units.
# Ballot Now Menus

## Election Menu
- Select Election
- Close Election
- Change Election
- Report Election
- Change Winners
- Base Election
- Close Election

## Print Ballots Menu
- Print Ballots
- Print Ballots:
  - Print Fraud

## Scan Ballots Menu
- Scan Ballots
- Scan Ballots:

## Record Ballots Menu
- Record Ballots
  - Report Unrecorded Ballots
  - Verify Contestant Record
  - Save Text to Contest

## Reports Menu
- Reports:
  - Election Report
  - Scanned Ballots
    - By Presence
    - By Batch

## Admin Menu
- Admin:
  - Log in...
Administrators and Operators login to the Ballot Now application by typing a User ID (username) and password in the Ballot Now Login window.

It is recommended that the user currently logged in:

- Stay at the computer while running the Ballot Now application
- Exit the Ballot Now application if s/he steps away from the system.

An administrator sets Ballot Now user privileges. See the Ballot Now Operations Manual for directions on setting user privileges. The following charts show user privileges for Ballot Now functions and Admin menu commands:

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<th>Administrator</th>
</tr>
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</tr>
<tr>
<td>Print Ballots</td>
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<tr>
<td>Print Reports</td>
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<td>Yes</td>
</tr>
<tr>
<td>Scan Ballots</td>
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<td>Yes</td>
</tr>
<tr>
<td>Resolve Write-ins</td>
<td>No</td>
<td>Yes</td>
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<tr>
<td>Resolve Unresolved Ballots</td>
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<td>Yes</td>
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<tr>
<td>Scan Batch Management</td>
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<td>Yes</td>
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<tr>
<td>Write CVRs to MDB</td>
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<td>Yes</td>
</tr>
<tr>
<td>Card Recovery</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Close Election</td>
<td>No</td>
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BALLOT NOW SOFTWARE TRAINING MANUAL

BOSS 2.8 Compatible
Ballot Now Version 1.4
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**eSlate Data Flowchart**

**BOSS**
- Software that creates the ballot database and saves it to a Mobile Ballot Box (MBB).

**Ballot Now**
- Software for paper ballot voting.
- Ballot Now uses a BOSS MBB to print, scan, image, and receive ballots and to save Cast Vote Records.

**eSlate**
- Hardware for in-person electronic voting.
- The eSlate Precinct Voting System (PVS) uses a BOSS MBB to present ballots and to save Cast Vote Records.
- PVS includes JBCS, eSlate, and Disabled Access Unit eSlate.

**Tally**
- Software that reads Cast Vote Records from MBBs, voted on Ballot Now and the eSlate PVS.
- Tally counts votes and produces election reports.
THE BALLOT NOW WINDOW

- Ballot Now Title Bar
- Menu Bar
- Minimize / Maximize / Close
- Taskbar
- Public Count of Cast Vote Records

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### BALLOT NOW MENUS

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<th>Election Menu</th>
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<th>Scan Ballots Menu</th>
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<tr>
<td>Election</td>
<td>Print Ballots</td>
<td>Scan Ballots</td>
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<tr>
<td>Select Election</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Close Election</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current General Election Settings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Set Ballot Writers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Select a Reporter</td>
<td></td>
<td></td>
</tr>
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<td>Exit</td>
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<tr>
<td>Receive Unresolved Ballots</td>
<td>Election Report</td>
<td>Login</td>
</tr>
<tr>
<td>Receive Cast Vote Results</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Save Cast Votes to Card</td>
<td></td>
<td></td>
</tr>
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<td>Unresolved Ballots</td>
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<td>Printed Ballots</td>
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<td></td>
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<tr>
<td>Cast Votes Results</td>
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<tr>
<td>Auto Total</td>
<td></td>
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Ballot Now User Privileges

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Ballot Now Training Manual

**BALLOT NOW PREFERENCES**

Under the *Election* menu, the *Preferences* option opens the *Program Options* window. This window includes 3 tabs that set preferences for printing, scanning, and resolving Ballot Now ballots.

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# Sequential Steps for Printing Ballots

**Step:**  
1. Insert a Mobile Ballot Box (MBB) into the reader and Open the election for that MBB.  
   - More Information: Ballot Now will only accept one Election mode MBB per election.  
2. Set up preferences for Ballot Printing and Ballot Stub options.  
   - More Information: Printing Options Include:  
     - Printing a duplex ballot,  
     - Selecting a printer,  
     - Including a ballot stub,  
     - Setting up a ballot stub,  
     - Enabling ballot serial numbering,  
     - Printing the serial number on the ballot stub, the ballot, or both.  
3. Determine maximum length of any ballot.  
   - More Information: Determine maximum length by referring to the Print Selection Window:  
4. Print Ballot Proofs.  
   - More Information: Printing ballot proofs is not required, but it is recommended.  
   - Note: When printing ballots with serial numbers, if the printer jams duplicate ballots may be printed. Should this situation arise, shred one copy of the duplicate ballot.  
5. For each ballot, select the precinct and number of copies you want to print.  
6. Print:  
   - a. TEST ballots,  
   - b. Sample ballots,  
   - c. Election ballots.  
   - More Information: Test and Proof ballots can only be printed from Test mode MBBS. Test Mode MBBS cannot print Election ballots.  
   - Sample ballots can be printed from Test MBBS or from Election MBBS. They will be rejected if scanned.  
   - Election ballots can only be printed from Election mode MBBS.  
   - More Information: Use this report to verify the number of ballots printed in each printing session. Keep for official records.
**Sequential Steps for Scanning & Processing Ballots**

<table>
<thead>
<tr>
<th>Step</th>
<th>More Information:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1)</td>
<td>Insert the Ballot Now copy of the Election MBB into the PC card drive in the computer and open the election for that MBB.</td>
</tr>
<tr>
<td>2)</td>
<td>Define write-ins and set up preferences for ballot (write-in) resolution options. Define write-in candidates who are certified and/or who are known and for whom cast votes will be counted. &gt; Select options to allow, or disallow free form write-ins.</td>
</tr>
<tr>
<td>3)</td>
<td>Set up preferences for scanner options. Select the scanner being used, duplex options, and disallow duplicate options.</td>
</tr>
<tr>
<td>4)</td>
<td>Scan the voted ballots: Ballots do not need to be pre-sorted. Ballots do need to be oriented correctly for the scanner (top toward scanner, first pages all oriented in the same direction and toward the scanning element, pages in order).</td>
</tr>
<tr>
<td></td>
<td>a) Group the ballots into batches,</td>
</tr>
<tr>
<td></td>
<td>b) Load the ballots into the scanner,</td>
</tr>
<tr>
<td></td>
<td>c) Scan ballots,</td>
</tr>
<tr>
<td></td>
<td>d) Review and print scan results, and Place the Scan Report on top of the scanned batch.</td>
</tr>
<tr>
<td></td>
<td>e) Save scanned images.</td>
</tr>
<tr>
<td>5)</td>
<td>Resolve unresolved Ballots. Resolve: &gt; Overvotes, &gt; Undervotes, &gt; Write-Ins. Choose whether or not to use the AutoResolve feature.</td>
</tr>
<tr>
<td>6)</td>
<td>Print a &quot;Scanned Ballots by Batch&quot; Report. Retain reports for official records.</td>
</tr>
<tr>
<td>7)</td>
<td>Save cast vote records to the MBB.</td>
</tr>
<tr>
<td>8)</td>
<td>Print an &quot;Election Report&quot;. The &quot;Scanned Ballots by Batch&quot; and &quot;Election Report&quot; reports should accompany Ballot Now MBBS to the Counting Station.</td>
</tr>
<tr>
<td>9)</td>
<td>Close the election.</td>
</tr>
<tr>
<td>10)</td>
<td>Print an &quot;Audit Trail&quot; Report, and any other reports needed. Retain reports for official records.</td>
</tr>
</tbody>
</table>

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Hart InterCivic, Inc.
### Sequential Steps for Scanning & Processing Ballots

<table>
<thead>
<tr>
<th>Step</th>
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<tr>
<td>11) Send the Election MBB and the &quot;Scanned Ballots by Batch&quot; Report to Tally.</td>
<td></td>
</tr>
<tr>
<td>12) Backup the Ballot Now Database to a CD-R.</td>
<td>See Backing Up Election Databases to a CD, page 38.</td>
</tr>
<tr>
<td>13) Add late mail to Tally via the Tally software &quot;Manual Votes&quot; option.</td>
<td></td>
</tr>
</tbody>
</table>
SAMPLE BALLOT NOW PROCESS

Elections Office Responsibilities:
1. Determine if "hand audit/sort of ballots is necessary and/or legally mandated.
2. Determine what resolution decision guidelines should be.
3. Open Election in test and election modes.
4. Set Preferences.
5. Print samples (Test MBB, No S/N, Simplex).
7. Close the L&A election and print official reports.
8. Print Ballots (Election MBB, S/N, Duplex).
9. Print "Printed Ballots Reports" at the end of each day.
10. Mark MBBS "Opened" and maintain security of MBBs.

Resolution Responsibilities:
1. Hand audit ballots for voter intent issues that will not be available for resolution in Ballot Now as per Elections Office directives.
2. Sort ballots into batches, page 1 up, about 50 – 100 ballots per batch, with obvious undervoted ballots with no voter intent issues in undervoted contests separated into "For AutoResolve" batches.
3. Scan ballots that are for undervote AutoResolve first. (Note: this will resolve all scanned batches available according to Ballot Now variables for identifying undervotes. DO NOT AutoResolve if there are unresolved ballots from a previous batch with voter intent issues.)
4. Print a "Scan Batch Report" for each batch scanned and stack ballots with report atop.
5. Sort out rejected ballots.
6. Save scanned batch images.
7. AutoResolve for undervotes.
8. Scan remaining batches.
9. Print a "Scan Batch Report" and stack ballots with report atop for each batch.
10. Sort out rejected ballots for each batch.
11. Scan previously rejected images as a separate batch or sort for duplication.
13. Save scanned batch images.
14. Reprint and duplicate voter marks for ballots that cannot be scanned.
15. Scan duplicated ballots.
17. Save scanned batch images.
18. Resolve ballots.
19. Print "Unresolved Ballot Report" at the end of each day. (It is okay to leave ballots unresolved unless you are closing the election or intend to AutoResolve).
20. Save to MBB at the end of each day.
21. Secure MBB at the end of each day (Elections Office will provide secure location).
22. (Repeat)
Log duplicate ballots, if printed, and repeat above procedure with duplicates.
- If duplicates are made, mark the original ballot with the word “original” and the duplicate with the words “duplicate of Serial Number _____.
- Use batch notes to identify batches that are rescans of previously rejected ballots, duplicated ballots, and/or AutoResolve batches.
- For write-in candidate names that appear repeatedly on ballots, enter the names as “certified” write-ins in Ballot Now (making the name available in a drop down window instead of having to keyboard each one in).
- Sort stacks should include: Received, Sorted into Batches, AutoResolve for Undervotes, Scanned, Rejected from Scan, To be Duplicated (with the reprinted ballots log), For Review.

Elections Office Responsibilities (continued):
11. Close the election in Ballot Now.
12. Print copies of all official reports, Audit Trail Report last.
13. Save the Ballot Now database to CD.
14. Close and delete any practice databases?
15. Provide secure transfer of Ballot Now MBB, Official Audit Trail Report, and Reprinted Ballot Log to the Counting Station.

Note: Turn the printer and scanner on first each morning. Start up the BNIP processing computers, if used, each morning and maximize the BNIP processor window. Start up the Ballot Now computer and open the Ballot Now application, select the BNIP window that is minimized on the task bar. Click on “Shut Down” to shut down the BNIP processor for the main Ballot Now PC. Continue operating Ballot Now.

Note: When printing ballots with serial numbers, if the printer jams duplicate ballots may be printed. Should this situation arise, shred one copy of the duplicate ballot.
HOW BALLOT NOW READS MARKED BALLOTS

It is not the objective of eState training specialists or Hart InterCivc to teach election law or to influence decisions on voter intent. Sections of state and federal election law may apply to Ballot Now voted ballots and should be regarded by the local elections administrator(s) in determining resolution procedures when processing ballots and determining voter intent. The sections of election law that may apply include, but are not limited to, references and decrees referring to counting irregularly marked ballots, preparing ballots for automatic scanning, and duplicating ballots.

Reading Ballot Now Bar Code Numbers

**Ballot Code**

Characters:
- 1 = printed by outside printer, 2 if printed by Ballot Now
- 2, 3, 4 = 00 if election ballot, 01 if test ballot, 02 if sample ballot
- 5, 6, 7, 8 = precinct index code
- 9 = page identification number
- 10 = language identification number
- 11 & 12 = party identification number

**Serial Number Code**

- If "Enable Ballot Serial Numbering" and "Readable Serial Number on Ballot" are selected in Ballot Now Preferences/Program Options, then a sequential serial number prints here in bar code and numeric forms. This is useful for election ballots.
- If "Enable Ballot Serial Numbering" is selected, but not "Readable Serial Number on Ballot" the serial number will not print in numeric form. The Ballot Now program will still identify ballots by serial number from the bar code.
- If "Readable Serial Number on Ballot" is selected, but not "Enable Ballot Serial Numbering" all ballots print with the serial number 00000000. This is useful for sample and proof ballots to demonstrate ballot serial numbering. Print these ballots before printing election ballots with serial numbers.
- If neither "Enable Ballot Serial Numbering on Ballot" nor "Readable Serial Number on Ballot" is chosen, the serial number will not print and Ballot Now will not identify ballots by serial number from the bar code. This is useful for sample and proof ballots. Print these ballots before printing election ballots with serial numbers.
How Marks Are Read By Ballot Now

Section 1: What works, and what does not

VOTE BOTH SIDES

BALLOT NOW WILL READ THESE MARKS

United States Representative, District 22
Representante de los Estados Unidos, Distrito Número 22

- Sam Houston
- Dr. Severo Ochoa
- Booker T. Washington
- Helen Keller
- Write In Voto Escrito

United States Senator
Senador de los Estados Unidos

- Frederick Douglass
- Amelia Earhart
- Henry Ford
- Pancho Villa
- Write In Voto Escrito

Governor
Gobernador

- George Washington
- Benjamin Franklin
- Write In Voto Escrito

Lieutenant Governor
Gobernador Técnico

- Harriet Tubman
- Write In Voto Escrito

OK TO USE:
Darker colored pens and markers.

NOT OK TO USE:
Light colored pens, markers, and pencils.
### BALLOT NOW WILL NOT READ THESE MARKS

**United States Representative, District 22**
- [ ] Thomas Edison
- [ ] Dr. Severe Ochoa
- [ ] Booker T. Washington
- [ ] Helen Keller

**Governor**
- [ ] Dennis Chavez
- [ ] Eli Whitney
- [ ] Eleanor Roosevelt
- [ ] Benjamin Franklin

**Lieutenant Governor**
- [ ] Clara Barton
- [ ] Thomas Jefferson
- [ ] Harry González
- [ ] Harriet Tubman

**Attorney General, Procurator General**
- [ ] Sam Houston
- [ ] Henry Clay
- [ ] Basile Coleman
- [ ] Daniel Boone

**Commissioner of the General Land Office**
- [ ] Jane Austen
- [ ] Davy Crockett
- [ ] Che Guevara

**Justice, Supreme Court, Place**
- [ ] George Washington
- [ ] Dr. Antonio Novello
- [ ] Molly Brown

---

**Instruction Note:**
Mark the box that is your choice for each race. When finished, place in the envelope provided for Ballot Now.

**Nota de Instrucción:**
Vota por el candidato de tu preferencia en cada carrera. Cuando haya terminado los espacios asignados a la banda del nombre del candidato, señale el boleto para el conteo.

**OK TO USE:**
Dark colored pens and markers.

**NOT OK TO USE:**
Light colored pens, markers, and pencils.
## Section 2: Marks that Ballot Now reads as overvotes

### Marks that Ballot Now reads as overvotes

<table>
<thead>
<tr>
<th>County Election</th>
<th>Election Condado</th>
</tr>
</thead>
<tbody>
<tr>
<td>Judge, Court of Criminal Appeals, Place 2</td>
<td>Juiz, Corte de Apelaciones Criminales, Lugar Núm. 2</td>
</tr>
<tr>
<td>Annie Oakley</td>
<td></td>
</tr>
<tr>
<td>Walt Whitman</td>
<td></td>
</tr>
<tr>
<td>José A. Cabrera</td>
<td></td>
</tr>
<tr>
<td>Write in Voto Escrito</td>
<td>JOSÉ A. CABRERA</td>
</tr>
</tbody>
</table>

### Sample Ballot

<table>
<thead>
<tr>
<th>County Commissioner, Precinct No. 2</th>
<th>Comisionado del Condado, Precinto Núm. 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>George Washington</td>
<td></td>
</tr>
<tr>
<td>Willa Cather</td>
<td></td>
</tr>
<tr>
<td>Dr. Lois T. Wright</td>
<td></td>
</tr>
<tr>
<td>Write in Voto Escrito</td>
<td></td>
</tr>
</tbody>
</table>

### Sample Ballot

<table>
<thead>
<tr>
<th>Proposition No. 1</th>
<th>Should the United States fund high-speed rail connecting major metropolitan areas?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Against En Contra de</td>
<td>For A Favor de</td>
</tr>
</tbody>
</table>

### Sample Ballot

<table>
<thead>
<tr>
<th>Proposition No. 2</th>
<th>Should sports stadiums be built with public funds?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Against En Contra de</td>
<td>For A Favor de</td>
</tr>
</tbody>
</table>

---

**From Black Box Voting Archives**
MARKS THAT BALLOT NOW READS AS OVERVOTES

How Ballot Now Reads Marked Ballots
How Marks Are Read by Ballot Now (cont.)

VOTE BOTH SIDES

County Election
Eleccion Condado
County Election
Eleccion Condado
January 14, 2002 - 14 Enero 2002
Precinct - Precinto: 1001-A

Instruction Note:
Mark the box next to your choice for each race. When finished, place in the envelope provided and mail.

Nota de Instrucciones:
Voto por el candidato de su preferencia en cada carrera listado completamente en el espacio proporcionado en la parte delantera del sobre. Envié su voto en el sobre provisto.

President
Presidente
Susan B. Anthony
Alexander Graham Bell
César Chávez
Thurgood Marshall
☐ Write In
Voto Escrito

United States Senator
Senator de los Estados Unidos
Frederick Douglass
Amelia Earhart
Henry Ford
Pancho Villa
☐ Write In
Voto Escrito

United States Representative, District 22
Representante de los Estados Unidos, Distrito Número 22
☐ Thomas Edison
☐ Dr. Severo Ochoa
☐ Booker T. Washington
☐ Helen Keller
☐ Write In
Voto Escrito

Attorney General
Procurador General
☐ Sam Houston
☐ Henry Cisneros
☐ Beesa Coleman
☐ Daniel Boone
☐ Write In
Voto Escrito

Governor
Gobernador
☐ Benito Juárez
☐ Thurgood Marshall
☐ Write In
Voto Escrito

Commissioner of the General Land Office
Comisionado de la Oficina General de Tierras
☐ Jane Austen
☐ Davy Crockett
☐ Che Guevara
☐ Write In
Voto Escrito

Lieutenant Governor
Gobernador Tantante
☐ Clara Barton
☐ Thomas Jefferson
☐ Henry González
☐ Harriet Tubman
☐ Write In
Voto Escrito

Justice, Supreme Court, Place 1
Juez, Corte Suprema, Lugar No. 1
☐ George Washington
☐ Dr. Antonio Novello
☐ Molly Brown
☐ Write In
Voto Escrito

Page 19
Hart InterCivic, Inc.
Section 3: Marks that Ballot Now reads as undervotes

VOTE BOTH SIDES
MARKS THAT BALLOT NOW READS AS UNDERVOTES

United States Representative, District 22
Representante de los Estados Unidos, Distrito Número 22
- Thomas Edison
- Dr. Severo Ochoa
- Booker T. Washington
- Helen Keller
- Write In

Manager

President
- Susan B. Anthony
- Alexander Graham Bell
- César Chávez
- Thurgood Marshall
- Write In

United States Senator
- Frederick Douglass
- Amelia Earhart
- Henry Ford
- Pancho Villa
- Write In

Governor
- Write In

Attorney General
- Write In

Commissioner of the General Land Office
- Commissioner de la Oficina General de Tierras
- Jane Austen
- Davy Crockett
- Che Guevara
- Write In

Justice, Supreme Court, Place 1
- Write In

Securities
- Write In

Treasurer
- Write In

Register of Voters
- Write In

Hart InterCivic, Inc.
How Ballot Now Reads Marked Ballots
How Marks Are Read by Ballot Now (cont.)

**VOTE BOTH SIDES**

**MARKS THAT BALLOT NOW READS AS UNDERVOTES**

<table>
<thead>
<tr>
<th>County Election</th>
<th>Etriangle Condado</th>
<th>County Election</th>
</tr>
</thead>
<tbody>
<tr>
<td>Election Condado</td>
<td></td>
<td>Election Condado</td>
</tr>
</tbody>
</table>

January 14, 2002 - 14 Enero 2002
Precinct - Precinto: 1001-A

Judge, Court of Criminal Appeals, Place 2
Just., Corte de Apelaciones Criminales, Lugar Núm. 2

- Anna Calley
- Walt Whitman
- José A. Cabral

Write In
Voto Escrito

Family District Judge, 309th Judicial District
Juez del Distrito de la Familia, 309 Judicial Distrito

- Florence Nightingale, NO
- Sir Isaac Newton, NO
- Eilian Ochoa

Write In
Voto Escrito

State Senator, District 4
Senador Estatal, Distrito Núm. 4

- Rosa Parks
- Samuel F.B. Morse
- Vicenta Fox

Write In
Voto Escrito

J. Smith (alias)

County Commissioner, Precinct No. 2
Comisionado del Condado, Precinto Núm. 2

- George Washington
- Willa Cather, YES
- Dr. Lois T. Wright

Write In
Voto Escrito
Section 4: Other marks that Ballot Now reads as valid votes

VOTE BOTH SIDES

QUESTIONABLE MARKS THAT BALLOT NOW READS AS VALID VOTES

County Election
Election Condados
County Election
Election Condados
January 14, 2002 - 14 Enero 2002

United States Representative,
District 22
Representante de los Estados Unidos, Distrito Número 22

☐ Thomas Edison
☐ Dr. Severo Ochoa
☐ Booker T. Washington
☐ Helen Keller
☐ Write In

Voto Escrito

☐ John Smith

Governor
Gobernador

☐ Deb Haaland
☐ Eli Whitney
☐ Eleanor Roosevelt
☐ Benjamin Franklin
☐ Write In

Voto Escrito

Lieutenant Governor
Gobernador Técnico

☐ Clara Barton
☐ Thomas Jefferson
☐ Henry González
☐ Harriet Tubman
☐ Write In

Voto Escrito

Hart InterCivic, Inc.
Section 5: Other write-in resolution

### OTHER WRITE-IN RESOLUTION

**County Election**  
Election Condado  
**County Election**  
Election Condado  
January 14, 2002 - 14 Enero 2002  
Preinct - Precinto: 1001-A

**Instruction Notes:**  
Mark the box next to your choice for each race. When finished, place in the envelope provided and seal.

**Nota de Instrucciones:**  
Vota por el candidato de tu preferencia en cada carrera marcando el espacio proporcionado en la hoja de votación. Luego, introduce la boleta en el sobre proporcionado y sella.

| President (Presidente) | United States Representative, District 22  
Representante de los Estados Unidos, Distrito Nº 22 |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Susan B. Anthony</td>
<td>Thomas Edison</td>
</tr>
<tr>
<td>Alexander Graham Bell</td>
<td>Dr. Severo Ochoa</td>
</tr>
<tr>
<td>César Chávez</td>
<td>Booker T. Washington</td>
</tr>
<tr>
<td>Thurgood Marshall</td>
<td>Helen Keller</td>
</tr>
<tr>
<td>Write In</td>
<td>Write In</td>
</tr>
<tr>
<td>Voto Escrito</td>
<td>John Smith (Certified)</td>
</tr>
</tbody>
</table>

| United States Senator  
Senador de los Estados Unidos  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Frederick Douglass</td>
<td>Dennis Chávez</td>
</tr>
<tr>
<td>Amelia Earhart</td>
<td>Ell Whitney</td>
</tr>
<tr>
<td>Henry Ford</td>
<td>Eleanor Roosevelt</td>
</tr>
<tr>
<td>Pancho Villa</td>
<td>Benjamin Franklin</td>
</tr>
<tr>
<td>Write In</td>
<td>Write In</td>
</tr>
<tr>
<td>Voto Escrito</td>
<td>Smitty</td>
</tr>
</tbody>
</table>

| Lieutenant Governor        
Gobernador Territorial  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Clara Barton</td>
<td>Thomas Jefferson</td>
</tr>
<tr>
<td>Thomas Jefferson</td>
<td>Henry González</td>
</tr>
<tr>
<td>Harriet Tubman</td>
<td>Harriet Tubman</td>
</tr>
<tr>
<td>Write In</td>
<td>Write In</td>
</tr>
<tr>
<td>Voto Escrito</td>
<td>Mickey Mouse</td>
</tr>
<tr>
<td></td>
<td>HARRIET TUBMAN</td>
</tr>
</tbody>
</table>
Ballot Now Training Manual

Ballot Now Operator Training Course Outline

BALLOT NOW OPERATOR TRAINING COURSE OUTLINE

Estimated Time: 1 day

Audience: Ballot Now Specialists, Elections Officials

Objectives: By the end of this course the trainee will be creating paper ballots using BOSS™-generated MBBS. The trainee will also run voted paper ballots through the Ballot Now scanner, resolve unresolved ballots, save the scanned cast vote records back to the original election MBB, and prepare the cast vote record for Tally vote-tabulating software.

Benefits of Ballot Now: Ballot Now integrates fully with the eSlate in-person voting system. Ballot Now uses PC technology that is simple to operate, and requires no programming. Ballot Now allows for printing, scanning, and resolving ballots. Ballot Now ballots include bar codes for precinct and serial number identification, obviating the need to sort ballots prior to scanning and preventing the same ballot from being scanned more than once. Ballots that need resolution are not out-stacked, but resolved on the PC by reviewing ballot images. The original ballot is not altered in order to resolve it, and it is always available in its original form.


Modules: 1-8

Prerequisite: Hands-on demonstration with the eSlate. Trainees will use the system as if they are "voters", if time and equipment availability allow.

Teaching Points:

- Module 1: Getting Started
  - System Overview and Benefits to Trainees, and Course Objectives
  - eSlate EVS data flowchart, Ballot Now Window, Ballot Now menus, Ballot Now preferences/Program Options window tabs
  - User Privileges
  - Logging in to Ballot Now
  - Opening an Election

  Exercise 1.1: Open Ballot Now. Log in. Activate an election from a BOSS MBB.
Module 2: Printing

- Pre-Printing Setup
  - Preferences/Ballot Printing Tab
  - Stub Label Options
- Print Selection Types
- Previewing & Printing Ballots
  - Note: printer jams can cause duplicate serial numbers to print. Double check for this if a printer jam occurs and shred duplicate ballot.
- Printing a Printed Ballots By Precinct Report
  - Exercise 2.1: Enable ballot serial numbering. Preview a ballot created in BOSS and saved on an MBB. Print a SAMPLE ballot. Print 10 TEST or ELECTION ballots. Print a Printed Ballots By Precinct Report.

Module 3: Pre-Scanning Setup

- Defining Certified Write-In names and aliases.
- Preferences/Ballot Processing Tab/Allowing Free-Form Write-ins
- Preferences/Scanner Setup Tab
  - Exercise 3.1: Select a contest that included write-in candidates, add 5 “certified” write-in candidates. Add a 6th candidate that is a misspelling of one of the first 5. Delete one “certified” write-in. Write the remaining names and aliases down for future use. Set scanner options for the scanner you currently have installed, and the ballot you will be scanning. Disallow duplicate ballots. Set Free Form Write-in options to reflect your jurisdiction’s guidelines.

Module 4: Scanning Voted Ballots

- Grouping Ballots into Batches
- Loading Pages into the Scanner
- Scanning Ballots
- Printing a Batch Scan Report
  - Exercise 4.1: Vote the batch of ballots that you printed earlier—include “certified” write-ins (and aliases), undervotes and overvotes. Organize, sort, and label a batch, or batches, for scanning. Load the batch into the scanner. Scan the ballots. Review and print the Ballot Scan Results. Print the Complete Scan Batch Report. Save the Ballot Scan Results. Print a Scanned Ballots By Batch Report.
Module 5: Recording Scanned Ballots
- Resolving Unresolved Ballots
- Resolving Overvotes & Undervotes
- Resolving Certified Write-ins
- Resolving Free-Form Write-ins
- AutoResolving Ballots
- Scan Batch Management
- Deleting a Scan Batch
- Saving CVR to MBB
- Printing an Audit Trail Report

Exercise 5.1: Resolve the scanned ballots from your previously scanned batch, one by one. Confirm overvotes and/or undervotes, change overvoted/undervoted contest marks, and resolve write-ins (certified and free-form, if applicable), as applicable.

Exercise 5.2: Delete the previously scanned batch. Rescan the batch. Use the AutoResolve function to resolve the ballots. Use the "Scan Batch Management" window to view and print the Accepted Ballot Report and the Rejected Ballot Report. Save the CVR to Ballot Now MBB. Print a Scanned Ballots Report and an Audit Trail Report.

Module 6: Reports
- Viewing and Printing Reports
- Listing of Available Reports
- Exporting a Report to a File
- Sample Report

Exercise 6.1: Review and print a Ballot Now report of your choice, if you have not yet done so. Print a Scanned Ballots by Batch Report and an Election Report, as these reports would accompany the MBB from Ballot Now to the Counting Station.

Module 7: Closing an Election
- Closing an Election
- Logging out of Ballot Now

Exercise 7.1: Close the Ballot Now election you have been working with. Print an Official Report of your choice. Log out of Ballot Now.

Module 8: Ballot Now Administration Tasks
- Ballot Now User Privileges
- Changing a password
- Adding A User
- Deleting a User
- Viewing the Ballot Now Audit Trail
- Appendices

Exercise 8.1: Log in to Ballot Now. View the options in the Administration menu. Administrative users, add yourself as a new user. Delete the original user. Add other operators as users, giving them appropriate privileges. View the Ballot Now Audit Trail Report. Logout of Ballot Now.
Ballot Now Operator Training Course Outline (cont.)

➢ Review Appendices and Day's lessons
   ▶ Appendices:
     ▶ Glossary of Terms
     ▶ Information, Confirmation, Error and Warning Messages
     ▶ Tips and Tricks
     ▶ Course Self-Checklist
## APPENDICES

### Appendix A: Glossary of Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCESS CODE</td>
<td>A four-digit number given to each voter from the JBC. The ACCESS CODE tells the eslate system which ballot style (precinct) to display to the voter.</td>
</tr>
<tr>
<td>ACCESS CODE Summary</td>
<td>A JBC report that is printed when polls are closed on Election Day. It lists the number of ACCESS CODES issued, voted, expired, and canceled.</td>
</tr>
<tr>
<td>Alphanumeric</td>
<td>A field type. Means that the field can contain both letters (alpha) and numbers (numeric).</td>
</tr>
<tr>
<td>Americans' with Disabilities Act (ADA)</td>
<td>A 1990 federal act, Public Law 101-336, that established comprehensive standards for the treatment of persons with disabilities in employment, public accommodations, and other programs, including those operated by state and local governments.</td>
</tr>
<tr>
<td>ASCII file</td>
<td>American Standard Code for Information Interchange. Files that, by their formatting, are easier to transfer between different types and versions of computers. Also called &quot;text files&quot;.</td>
</tr>
<tr>
<td>Audit Trail</td>
<td>Information that allows the elections office to view the steps that occurred on the equipment included in an election to verify the steps and procedures followed without compromising voter privacy.</td>
</tr>
<tr>
<td>Ballot Format</td>
<td>The arrangement of the ballot created in BOSS. Ballots may be formatted for the eslate PVS or for Ballot Now.</td>
</tr>
<tr>
<td>Ballot Instructions</td>
<td>Instructional text that appears at the top of the ballot. There are two separate types of Ballot Instructions: (1) PVS (for the eslate PVS system) and (2) Ballot Now.</td>
</tr>
<tr>
<td>Ballot Now™</td>
<td>The eslate EVS software application that prints paper ballots on demand and then digitally images the voted ballots to save for delivery to Tally.</td>
</tr>
<tr>
<td>Ballot Style</td>
<td>The specific ballot created by precinct assignments to contests in BOSS.</td>
</tr>
<tr>
<td>Ballot Text</td>
<td>Instructional text embedded in the ballot. Ballot Text is usually used to identify a section of the ballot.</td>
</tr>
<tr>
<td>BOSS™</td>
<td>Ballot Origination Software System. This is the software that builds an election database and writes multiple ballot styles. BOSS is used to create the MDD and DAU cards that drive PVS and Ballot Now™.</td>
</tr>
<tr>
<td>Contest</td>
<td>A choice to be made on the ballot. Also known as races, offices, issues, referendums, and questions.</td>
</tr>
<tr>
<td>Cast Vote Record (CVR)</td>
<td>Electronic version of each vote cast, reflecting a ballot from each voter.</td>
</tr>
<tr>
<td>Crystal Reports</td>
<td>An off-the-shelf report formatting software application for database-centered products.</td>
</tr>
<tr>
<td>Cumulative (ACCESS CODE) Summary</td>
<td>A summary on the JBC Suspend Report or Daily Detail report that lists the ACCESS CODES issued, voted, expired, and canceled for the entire session of Early Voting.</td>
</tr>
<tr>
<td>Database</td>
<td>A storage point for information (data).</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>------</td>
<td>------------</td>
</tr>
<tr>
<td>Cyclic Redundancy Check</td>
<td>A continuous test of each transfer of data within a system to insure that the data received at the end of the transfer is the same as the data originated by the source.</td>
</tr>
<tr>
<td>Daily Detail Report</td>
<td>A JBC report that can be printed out when polls are suspended in Early Voting. This report lists the number of ACCESS CODES issued and voted by precinct, as well as Daily (ACCESS CODE) Summary and Cumulative (ACCESS CODE) Summary Reports.</td>
</tr>
<tr>
<td>Daily (ACCESS CODE) Summary</td>
<td>A summary on the JBC Suspend Report and Daily Detail report that lists the ACCESS CODES issued, voted, expired, and canceled for only the current day of Early Voting.</td>
</tr>
<tr>
<td>Daisy Chain</td>
<td>Items connected in a series. The eSlates are daisy chained, one to another, with one plugging into the JBC.</td>
</tr>
<tr>
<td>DAU card</td>
<td>The PC card that enables the DAU eSlate to carry audio and respond to the specialty input devices. Also called an “Audio Card”.</td>
</tr>
<tr>
<td>Disabled Access Unit™ (DAU)</td>
<td>An eSlate that includes a PC card module. A PC card is inserted into this module so that voters with disabilities can vote independently and privately, listening to the ballot with headphones and/or interacting with the ballot using tactile input switches or a sip and puff device. Also called the “DAU eSlate”.</td>
</tr>
<tr>
<td>Direct Record Electronic (DRE)</td>
<td>The election industry term for an electronic machine at which a voter can view and vote a ballot.</td>
</tr>
<tr>
<td>Election Identification Report</td>
<td>A report that the JBC prints when the polling place ID is selected. The report contains the current date and time, jurisdiction name, election name, election date, polling place, and number of precincts enabled.</td>
</tr>
<tr>
<td>eSlate Unit</td>
<td>A Hart InterCivic electronic voting input device without audio capability. An electronic ballot is presented on this unit.</td>
</tr>
<tr>
<td>eSlate Electronic Voting System (EVS)</td>
<td>The entire system from BOSS to Tally. Includes: BOSS, the Precinct Voting System (see eSlate Precinct Voting System), Ballot Now, and Tally. Also called EVS or eSlate EVS.</td>
</tr>
<tr>
<td>eSlate Precinct Voting System (PVS)</td>
<td>Those components of the eSlate EVS that are required for election activities at individual polling places. The PVS includes: JBCs, eSlates, DAU eSlates, MBBs, and all accessories for polling place voting.</td>
</tr>
<tr>
<td>Fast Trak Tally</td>
<td>A software utility that allows a summary of results to be sent to a central location from the Judge's Booth Controller, via modem, to provide advanced unofficial results.</td>
</tr>
<tr>
<td>Field</td>
<td>An area available for data entry in a software application, like BOSS or Tally.</td>
</tr>
<tr>
<td>Firmware</td>
<td>Computer programs installed permanently in a hardware device that allow data to be read and a program to be executed, but for which alterations of the data or the program are not permitted.</td>
</tr>
<tr>
<td>Flash Memory</td>
<td>Flash memory is reprogrammable, read only memory and is used in PC cards or MBBs. Flash Memory does not require continuous electric power to operate. It is a system that can store more data and work faster than a traditional floppy disk.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Judge's Booth Controller</strong></td>
<td>The control unit of the eSlate PVS, through which a poll worker distributes electronic ballots to the eSlate and DAU eSlate.</td>
</tr>
<tr>
<td><strong>JBC Initialized Report</strong></td>
<td>A report printed from the JBC any time the system is powered on. A self-diagnostic test is run on the system, and the result is indicated as &quot;PASS&quot; on the report.</td>
</tr>
<tr>
<td><strong>Jurisdiction</strong></td>
<td>A precinct or group of precincts managed by a single organization.</td>
</tr>
<tr>
<td><strong>Logic and Accuracy Test (L &amp; A)</strong></td>
<td>In the context of an election, a test to check the accuracy of a piece of voting equipment. It is accomplished by feeding test ballots for which the results are already known (i.e., a &quot;test deck&quot;) through the ballot counting system and comparing the results with the expected results.</td>
</tr>
<tr>
<td><strong>Mobile Ballot Box (MBB)</strong></td>
<td>A PC card that holds all of the ballot information for the eSlate EVS. An MBB is placed in the JBC unit, and an MBB is used in the Ballot Now computer. Cast Vote Records are stored on MBBS.</td>
</tr>
<tr>
<td><strong>Network Configuration Report</strong></td>
<td>A report printed on the JBC after booths are assigned. The report contains the serial number, software version, PUB count, and PVT count for the JBC and each eSlate unit.</td>
</tr>
<tr>
<td><strong>PC Card</strong></td>
<td>A piece of hardware about the size of an ATM card. It is an information storage device, similar in function to a floppy disk. It is also called a &quot;PCMCIA&quot; card. In the eSlate Electronic Voting System it is called a Mobile Ballot Box (MBB).</td>
</tr>
<tr>
<td><strong>Party</strong></td>
<td>A political party. For example, Democrat or Republican.</td>
</tr>
<tr>
<td><strong>Polling Place</strong></td>
<td>Where voters physically go to vote. A single polling place, during early voting, can support multiple precincts.</td>
</tr>
<tr>
<td><strong>PUB Count</strong></td>
<td>A six-digit number, shown on the Network Configuration Report from the JBC that indicates how many votes have been counted on that machine for the current election.</td>
</tr>
<tr>
<td><strong>Precinct</strong></td>
<td>A jurisdiction subdivision for election purposes.</td>
</tr>
<tr>
<td><strong>Provisional Voter</strong></td>
<td>A voter who may not meet the qualifications for voting at that polling place, but is allowed to vote on a &quot;provisional ballot&quot; under conditions by state election law. Because the voter is &quot;provisional&quot;, his/her ballot must be retrievable by election officials under certain conditions that vary from state to state. Also called a voter with a &quot;challenged ballot&quot;.</td>
</tr>
<tr>
<td><strong>PVT Count</strong></td>
<td>A six-digit number, shown on the Network Configuration Report from the JBC that indicates how many votes have been counted on that machine in its lifetime.</td>
</tr>
<tr>
<td><strong>Retrieval Code</strong></td>
<td>A unique number assigned to a provisional ballot to enable swift retrieval of that ballot from the eSlate system by election officials.</td>
</tr>
<tr>
<td><strong>Select Wheel</strong></td>
<td>The rotary wheel on the eSlate and DAU eSlate that allows a voter to navigate the ballot and highlight choices by turning the wheel. It is also called Rotary Select™ Navigation System.</td>
</tr>
<tr>
<td><strong>Sip &amp; Puff</strong></td>
<td>An input device that connects to the DAU eSlate in the handicap access jack. This enables voters with disabilities with extremely limited mobility to vote with a mouth-controlled device.</td>
</tr>
<tr>
<td><strong>Split Precinct Spoiled Ballot</strong></td>
<td>A ballot that has been ruined somehow. The voter is still present, and the voter needs a new ballot. With the eSlate system, a ballot is spoiled if the voter gets the wrong ballot style (precinct), the wrong language, or is not on the DAU eSlate but needs to be.</td>
</tr>
</tbody>
</table>
### Appendix A: Glossary of Terms (cont.)

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suspend Report</td>
<td>A JBC report that automatically prints when polls are suspended in Early Voting. The report lists the PUB count and PVT count of the JBC and eSlate units, a Daily (ACCESS CODE) Summary, and a Cumulative (ACCESS CODE) Summary.</td>
</tr>
<tr>
<td>Tactile Input Switches</td>
<td>Also called “jelly switches” or “jelly buttons”. Red and green “paddles” that enable voters with disabilities to vote without using the SELECT wheel and ENTER button on the eSlate. Voters without fine motor control use these. The RED tactile input switch is similar to the eSlate’s SELECT wheel. The GREEN tactile input switch is similar to the eSlate’s ENTER button.</td>
</tr>
<tr>
<td>Tally™</td>
<td>The eSlate EVS tabulation software. After an election, the Tally software counts the votes on the MBB(s) and produces reports on those cast votes.</td>
</tr>
<tr>
<td>Tally Report</td>
<td>A JBC report that is printed when polls are closed on election day. It includes the date, time, precinct, a tally of votes for each contest, and an ACCESS CODE Summary.</td>
</tr>
<tr>
<td>Thrown-out Ballot</td>
<td>A voted ballot that the voter did not place into the ballot box before leaving the polling place. With the eSlate system, this is a ballot that the voter did not cast by pressing CAST BALLOT, and the voter is not present.</td>
</tr>
<tr>
<td>UPS</td>
<td>Uninterruptible Power Supply.</td>
</tr>
<tr>
<td>Voter Registration Computer</td>
<td>An electronic poll book. Sometimes known as a “thin client”.</td>
</tr>
<tr>
<td>Zero Tape Report</td>
<td>A JBC report that prints out when polls are opened on the first day of Early Voting and on Election Day. This report lists the contests and candidates on the ballot, and verifies that the number of votes for each candidate is zero.</td>
</tr>
</tbody>
</table>
## Appendix B: Information, Confirmation, Error, and Warning Messages

### Information
- Informs about a successful operation.
- Has an information icon (an I in a bubble).
- Has only an OK button.

### Confirmation
- Used when modifications made are lost when Close is clicked instead of Save.
- Answered by Yes or No.
- Has a question mark icon (a ? in a bubble).
- Can include text from the command performed.

### Error
- First statement in error gives the problem.
- Second statement tells you what to do.
- The error icon (an X inside a red circle) is present.
- Has only an OK button.

### Warning
- Appears when the program wants you to double-check a command.
- Can include text from the command performed.
- Has an exclamation icon (a ! inside a yellow triangle).
Appendix C: Tips and Tricks

The following apply to ALL eSlate Electronic Voting System programs.

Password tips:

Do not give out the administrator password, either to the computer where the eSlate Electronic Voting System software is kept, or to your administrator login for BOSS, Tally, and/or Ballot Now.

Once you are assigned your password, immediately log in to BOSS, Ballot Now, and Tally and change your password. Have operators with "User" level privileges do the same.

Do not use:

- Any password you have used before.
- Any string of 3 characters repeated or reversed.
- Any character repeated more than twice.
- Your name or your initials.
- Your computer user ID in any form.
- The names of relatives, birthdays, phone numbers or the company name.
- The number for this year, last year or next year, or the three-character abbreviations for the months.
- Telephone number or car license plate numbers.
- Common mathematical values (like pi, sigma and natural log).

Do use:

- A combination of upper and lowercase letters.
- A password that is at least 8 characters long.
- A new password every 6 months.
- Random characters you will remember.

Tips for a secure password:

- Use the first letters of the words in a memorable phrase.
- Use a meaningless but easy-to-remember phrase.
- Combine numbers and letters.
- Note the password in a private and secure location.
Software Features:

- Whichever button is shadowed/dotted inside a window is what the computer is going to assume you mean to do when you press Enter.
  
  For example:

- In a menu, an arrow facing to the right ▶ opens up an item called a “pop-up menu”, offering more choices.
- In a dialogue box, the arrow facing down ▼ opens a “list box”, offering more choices.
- On the menu bar and on buttons inside a window, there is one letter underlined. For example, File or Add. These are called hot keys and can be used to access menus, menu options and buttons instead of using the mouse. To access hot keys:
  1. Press Alt on the keyboard (to either side of the space bar).
  2. Press the underlined letter in the word (for example: F in File or A in Add).
    - The menu drops down or the button performs its action.
    - Once inside a menu, you simply press the underlined letter in the menu option you are looking for (for example: press O in Open). You do not need to press Alt again.
    - You can also use the arrow keys on your keyboard (←→↑↓) to move around inside a menu. Once you have highlighted the menu option you wish to use, press Enter and the option launches.
    - To exit a menu, press Esc until the menu disappears (usually one time for each menu/submenu open).

The following tips apply to a specific software program listed to the left.

- **BOSS & Ballot Now**: To highlight/select a list of precincts that are all together in the list, use
  
  SHIFT + CLICK.
  
  1. Click the first one once.
  2. Hold down on shift.
  3. Click the last one once.

- **BOSS & Ballot Now**: To highlight/select a list of precincts that are NOT all together, use
  
  Ctrl + CLICK.
  
  1. Click the first one.
  2. Hold Ctrl.
  3. Continue to click holding Ctrl until you have selected all those you wish.
  4. Release Ctrl.
BOSS Copy and Paste:
1. Select the item(s) you wish to copy from the source document.
   (To select, click and drag over the item to highlight it.)
2. Press Ctrl and then C (the shortcut key for copy).
3. Return to BOSS (by clicking on its program button on the taskbar.
   It says Ballot Origination ... or as much of the title as it can fit
   onto the button).
4. Make certain the cursor is blinking in the field you wish to paste
   into and press Ctrl and then V or Shift + Ctrl + V to paste.
5. You can paste English and Spanish proposition or instruction text
   into the “English” panel, then cut and paste the Spanish from that
   panel to the “Spanish” panel.
6. You can copy and paste from one BOSS field to another, in most
   windows, by using Shift + Ctrl + a shortcut key (C,X,V).

BOSS To force a line within text use the | (pipe character). This character can
be inserted using Shift and the \ key on your keyboard. The \ is just above the
enter button and looks like:

```
|   |
```

BOSS: Once the ballot is generated the current database is, for all practical
purposes, locked for editing or changing. Audio is still available after
generating a ballot and before writing MBBS. Once the MBBS are written,
audio is no longer available and the only action available is writing MBBS.
Once the BOSS database is locked for Tally no actions are available in that
database.

Tally: Test and Election mode MBBS are read into separate databases. This
is in order to protect the database integrity. Only one election database may
exist for a unique BOSS database.

Tally: You can read unvoted MBBS that were written as spares into Tally.
This allows you to account for all MBBS written for the election. Reports and
the audit trail will reflect that all MBBS are accounted for.
Appendix D: Ballot Now Reprinted Ballots Log & Envelope

Directions: If a ballot is returned with one or more pages missing, or if a ballot is damaged to the extent that it does not scan, you need to reprint a ballot from the same precinct. You will duplicate, by hand, the voter's choices onto the reprinted ballot. You will then save the original ballot in this envelope and run the reprinted ballot through the Ballot Now scanner. It is best to outstack these ballots and run them through Ballot Now in a separate late batch, so that these unique ballots can be easily tracked. In the Ballot Now Scan Batch Notes field, note that these ballots are from reprints. Proceed to process the reprinted ballots, as usual.

<table>
<thead>
<tr>
<th>Date</th>
<th>Printed Operator Name</th>
<th>Operator Initials</th>
<th>Original Ballot Serial Number</th>
<th>Reprinted Ballot Serial Number</th>
<th>Reason Reprinted/Comments</th>
</tr>
</thead>
<tbody>
<tr>
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</table>
Appendix E: Backing Up Election Databases to a CD

These steps assume that you are using the Adaptec Easy CD Creator program, though your version may have slightly different screens, the steps will be similar. These steps show one way to backup files using the Adaptec program.

We also suggest using a CD-R instead of a CD-RW. A CD-R is a one-time use—you can only write to it once, and then you can only Read off of it. A CD-RW is readable/writeable, and can be used multiple times like a floppy disk—you can Read and Write to it as often as you want. CD-R's are fairly inexpensive, and the data on the CD itself cannot be changed. This makes the CD-R option a good media for backing up data.

<table>
<thead>
<tr>
<th>Steps</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Close BOSS &amp; Tally (and Ballot Now, if applicable).</td>
<td></td>
</tr>
<tr>
<td>2. <em>Click</em> the Easy CD Creator shortcut on the desktop:</td>
<td>The Adaptec CD Creator <em>Select a Project</em> menu appears.</td>
</tr>
<tr>
<td>3. Rollover (mouse over) the <em>make a data CD</em> button.</td>
<td></td>
</tr>
</tbody>
</table>

4. *Click* on *dataCD*.
Appendix E: Backing Up Election Databases to a CD

The Data CD Project window appears:

5. Rename the CD to reflect the Election Title.

6. Navigate to C:\bossDatabase

7. Drag and Drop the BOSS election database folder (named by timestamp) from the upper panel to the CD in the lower panel.
8. Rename the backup BOSS database on CD to reflect the title of the election.

9. Repeat the drag, drop, and rename steps for the Tally and Ballot Now databases:
   - The Tally database is in a timestamped folder, like the BOSS database, located at C:\tally\Database.
   - The Ballot Now database (and image files) folder is named with the Ballot Now election I.D. It is located at D:\Program Files\Hart InterCivic\Ballot Now.
Before you record to the CD, the CD Project window should look something like this:

10. Click record.

The Record CD Setup window appears:

11. Click Options
   (If not already selected).
13. Select Track-At-Once and Finalize CD.

14. Click Start Recording.
15. When the Disk Progress bar indicates the CD is 100% written, click Details.

16. Verify that all tracks and files were recorded and click OK.
Appendix E: Backing Up Election Databases to a CD

The following information box appears:

17. Click NO.

<table>
<thead>
<tr>
<th>Steps</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>18. Close the Easy CD Creator windows.</td>
<td></td>
</tr>
<tr>
<td>19. Label the CD.</td>
<td></td>
</tr>
<tr>
<td>20. Load the CD, navigate to the CD drive and</td>
<td>verify that the CD contains all of the databases you intended to back up.</td>
</tr>
<tr>
<td>21. File the CD in a secure location.</td>
<td></td>
</tr>
</tbody>
</table>

Hart InterCivic, Inc.
### Appendix F: Course Self-Checklist

Respond **YES** or **NO** to the following items regarding the Ballot Now Software Training.

<table>
<thead>
<tr>
<th>Learning Points</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I am able to log into Ballot Now.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. I can open an election.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. I am able to setup for pre-printing.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. I can print ballots (including TEST, SAMPLE &amp; ELECTION Ballots).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. I am able to define write-ins &amp; aliases.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. I can setup batches for scanning.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. I am able to scan ballots (including grouping &amp; loading batches).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. I am able to resolve invalid ballots.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. I can review Cast Vote Records (CVRs).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. I am able to write a CVR to an MBB.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. I can view &amp; print reports.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. I am able to change my password.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. I can view the public counter.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. I am able to log out of the current election.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. I can view &amp; print an audit log report.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. I am able to add &amp; delete users (for ADMIN only).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. I can close an election.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>