Election Day Electronic Pollbook:

Election Inspector Manual

October 2024

I. Introduction to the Electronic Pollbook

The electronic pollbook (EPB) is required equipment for each precinct that serves many functions. These functions include checking voter registration status, issuing ballots (including spoiling and reissuing), and producing post-election reports to complete the official precinct record.

Important Considerations

- An encrypted (password protected) flash drive is required to store election files and to transfer files between the EPB laptop and QVF. Remember: **Never store the flash drive password with the flash drive!** Data flows from QVF to the EPB (pre-election) and from the EPB to QVF (post-election).

Pre-election file transfer: QVF to EPB

QVF → EPB_Package on encrypted flash drive → EPB
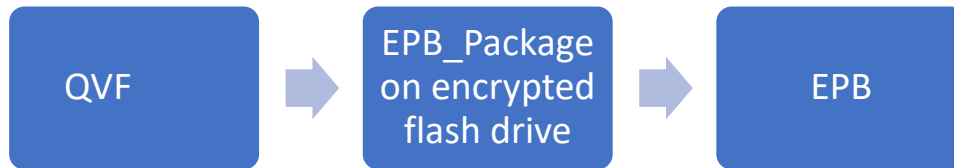
Post-election file transfer: EPB to QVF

EPB → EPB_History.zip on encrypted flash drive → QVF
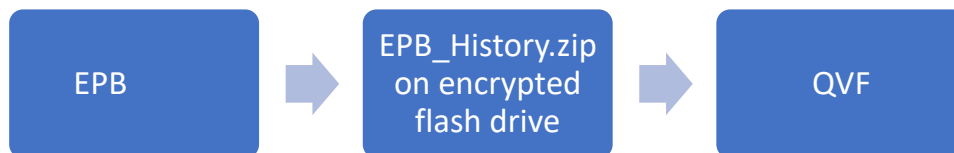
Getting Started: Election Day Reminders

1. **The laptop <u>must</u> be in airplane mode with Wi-Fi and any network connections disabled on Election Day.**[1] To verify airplane mode is enabled, select the notifications icon. Make sure that the airplane mode is blue and that the Wi-Fi button is gray*.*
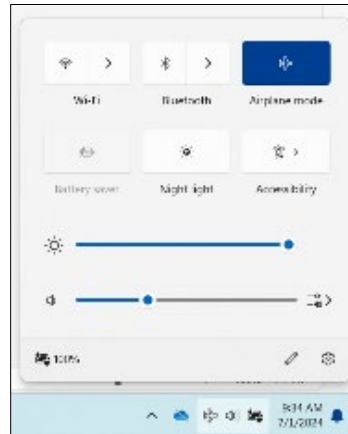
2. **Backup the EPB file on the encrypted flash drive!** When you save the backup file, it does not automatically save to the flash drive. Browse to the location where you need to save the file, which is the encrypted flash drive. See page 6 for instructions on how to back up the EPB.

3. **Unable to Record an Absentee Ballot?** Select the File menu, select Options, and add a checkmark to "Allow the recording of Absentee Ballots."

4. **Spoiling an Absentee Ballot?** Clerk-delivered absentee ballots are <u>never</u> spoiled in the EPB on Election Day. The duplication process does not include spoiling the original ballot number; refer to FAQ #10 on page 47.

    a. For absent voter ballots to be tabulated by the voter in the precinct on Election Day (AV to ED) but need to be spoiled, refer to page 19 or the *Voter Tabulation of AV Ballots on Election Day (AV to ED) Guide* for further detail.

5. **Recording ballots sent electronically that need to be duplicated?** Process an absent voter's electronic ballot in the EPB with the same **"ET#" ballot number** originally recorded by the clerk. The

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[1] The Dual ePollbook Supplemental Guide (csod.com) discusses acceptable hard-wired connection for a Dual EPB arrangement in large, busy Election Day precincts with tech support onsite.

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number of the ballot onto which the votes are duplicated is **NEVER** assigned to the absent voter in the EPB. Simply use the duplication process established for other absent voter ballots that require duplication and record the number of ballots used in duplication on line H of the Ballot Summary.

6. **Save Voter History to the encrypted flash drive.** The voting history file (epb_history.zip) must be saved to the flash drive in addition to the 3 PDF reports and the backup file at the end of the night. Refer to page 40 for instructions.

7. **Even if your laptop freezes, it's going to be OK**!

While other workers continue to process voters using the paper backup:

A. Try to close and reopen the EPB program, using Ctrl + Alt + Delete if necessary to use the Task Manager to end the task and close the EPB application.

B. If that doesn't work, you may restart the computer. **Remember to log back into the flash drive** as well as the EPB program before you begin working again.

II. Election Day EPB Tasks

Prepare the EPB for Opening the Polls

1. Make sure the EPB laptop is plugged in—to the surge protector, and then to the wall—at all times.

2. Plug the barcode scanner and mouse into USB ports.

3. Turn the laptop on.

4. Once the laptop has booted up, make sure that the laptop cannot connect to the internet by turning on Airplane Mode to ensure Wi-Fi is disabled (refer to page 2).

Log into the encrypted flash drive

To log into the flash drive, insert it into a USB port and:

1. Select the Windows Explorer folder icon

2. Select Removable Disk (Drive letter may vary)

3. Enter the password

4. Select Unlock
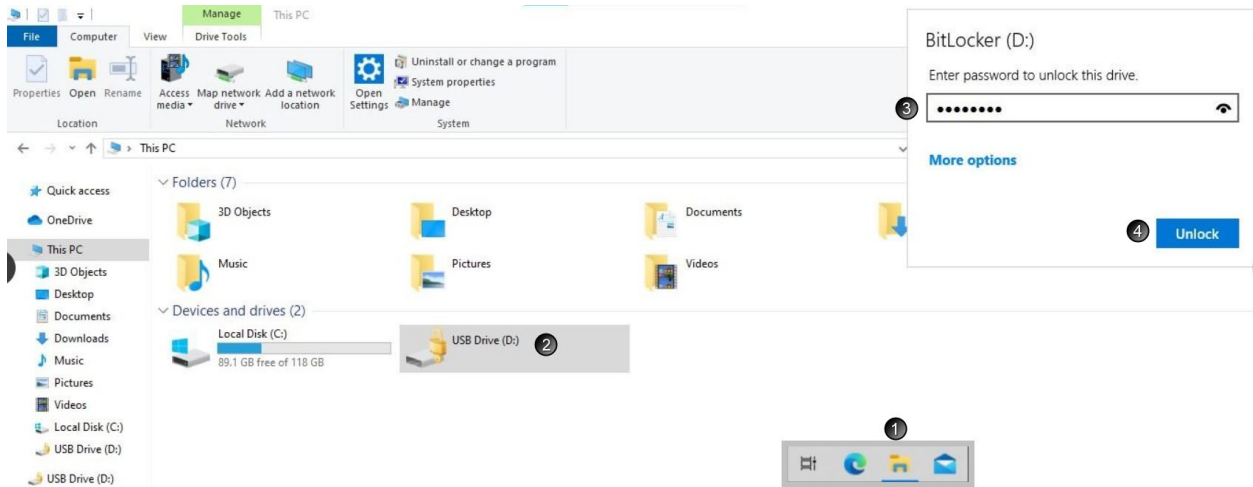
Log into the EPB software

After you have inserted and logged into the encrypted flash drive with its password, you can open the EPB program.

To log into the EPB software:

1. Double-click or select the Electronic Poll Book icon in the upper left corner of the desktop.

2. Enter Encryption Password and select Enter.

3. Enter Username and User Password and select Enter.

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Review User Account Setup

If more accounts are needed than were set up in QVF, create those user accounts now. Changes or the addition of EPB users must be completed by 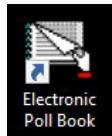an Admin User. Setting up a unique username and password for each EPB user allows tracking of use on Election Day. The administrator account(s) set up in QVF should not be used by election inspectors.

Note: Passwords are case sensitive.

To add a user:

1. Click Sys Admin

2. Click User Administration
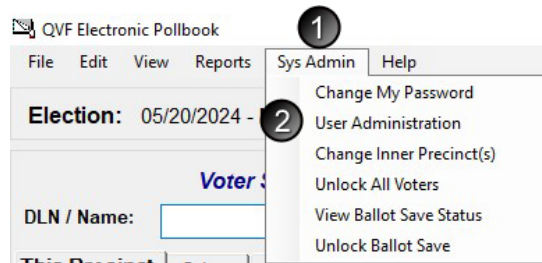
3. Click New
   a. Note: Users can be Deleted or Edited from the User Administration screen.
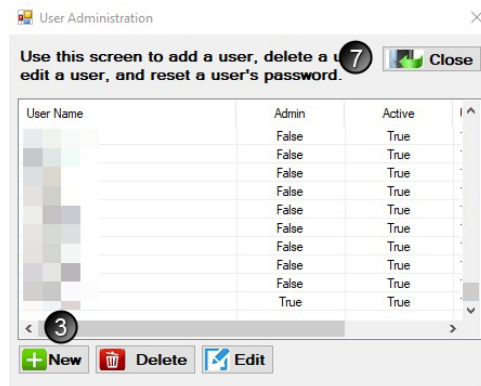
4. Enter a Username (must be at least 5 characters long and cannot contain any spaces – no longer must be all caps) and a strong password.

5. Select user type.

6. Click OK.

7. Repeat Steps 3-6 until all users are set up.
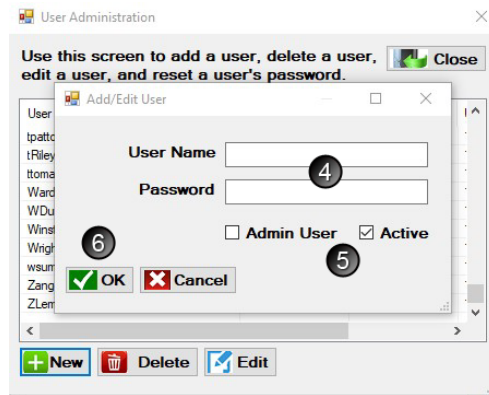
8. Click Close.

Save the First EPB Backup: Redirection Action Required!

You must keep the encrypted flash drive plugged into the laptop all day. This is necessary for the **Backup** files to be saved onto the encrypted flash drive.

Note: Complete the Backup process frequently throughout the day to ensure processed voter data is saved in the event of needing to restore the EPB data.

To Back up the EPB:

1. Click File.

2. Click Backup.
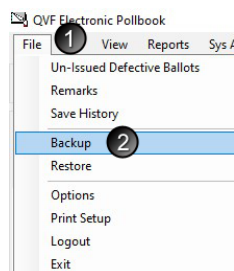
3. Click the button at the end of the file path field.
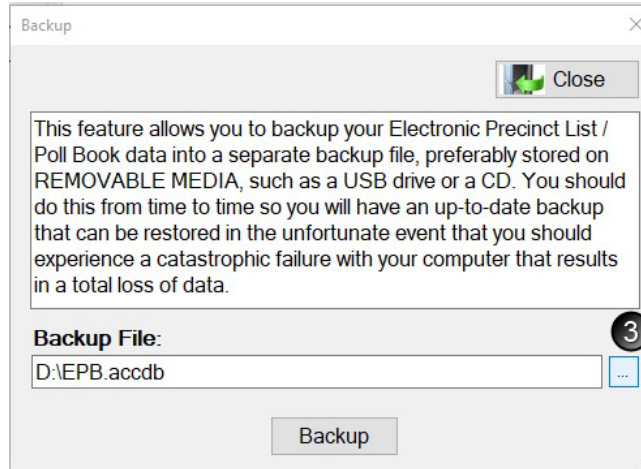
4. Select Removable Disk (Drive letter may vary). Use the encrypted flash drive to save files throughout the day and after the polls close. Future backups should remember the drive you select in this step.

5. Double-click the [ElectionDate] folder

6. Click Save

7. Click Backup

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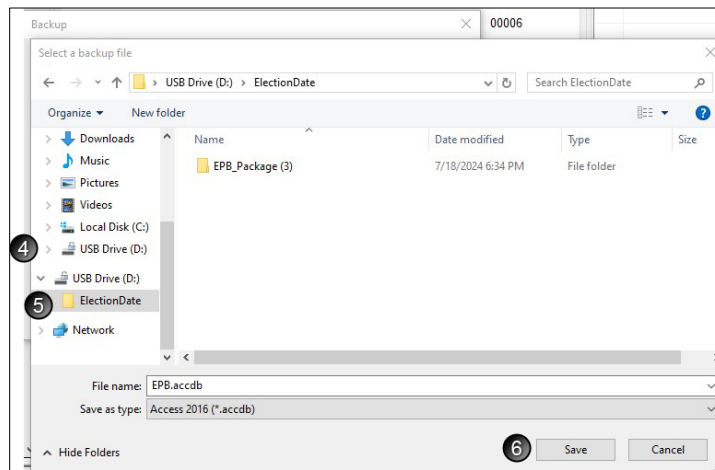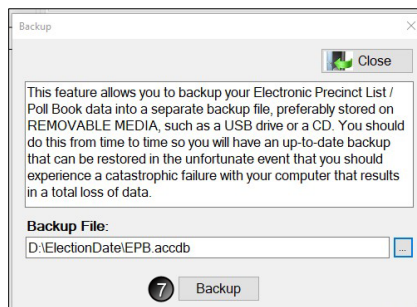
After a few seconds, the Backup is in progress message will appear, and the backup continues briefly in the background until completed.
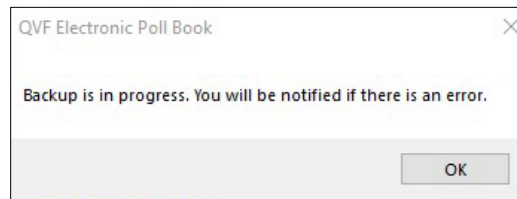
The laptop and EPB software are now ready for voters!

Use the EPB Main Screen to Process each Voter

The EPB main screen is divided into three sections. Take a moment to become familiar with the various parts of the screen. **Make sure the top line lists the correct election and precinct number.**
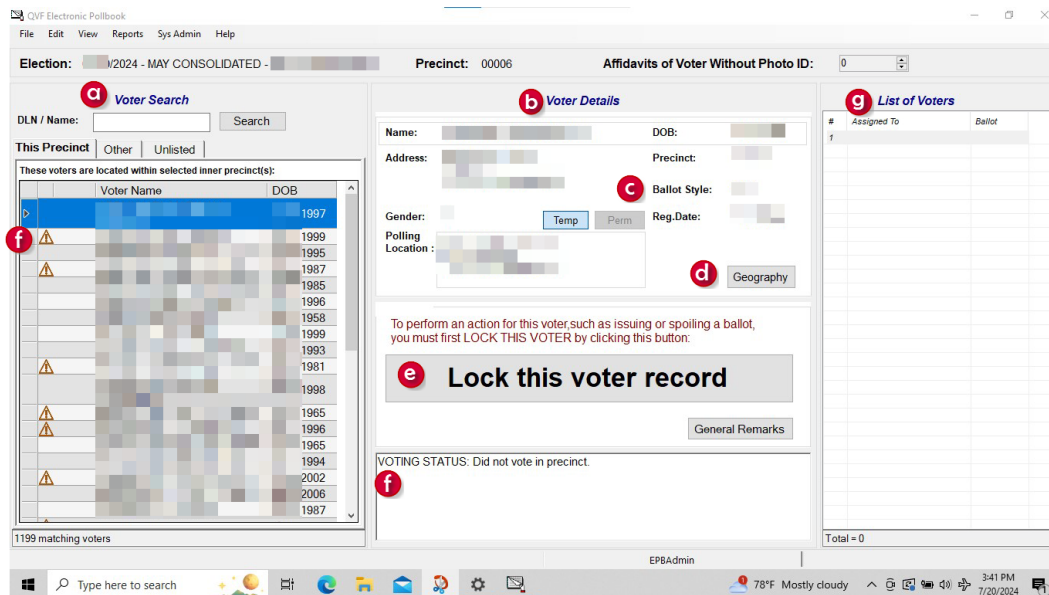
A. **Voter Search**: The Voter Search section of the screen is the precinct list. All voters in your precinct will be listed under **This Precinct** tab**.** The **Other** tab provides access to the lists of other precincts in the jurisdiction. The **Unlisted** tab is available to add voters not found in either list in certain situations.

B. **Voter Details**: The Voter Details section of the screen shows the voter's registration information.

C. The **Ballot Style** that should be issued to the voter is displayed to the right of the Voter Details.

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D. The **Geography** button provides detailed district information for each voter.

E. The **Lock this Voter Record** action box is where various actions can be taken for the voter, including issuing and spoiling a ballot.

F. **Voting status flags** provides information regarding the voter's status and any actions that may be necessary for the voter to cast a ballot.

G. **List of Voters**: The List of Voters section records the voter's name and what ballot number was assigned to them in a running list. This section is for reference; use it throughout the day to balance with the tabulator.

Important Note: If a voter does not wish to have their driver's license scanned, their name should be typed into the EPB software.

Assign a Ballot

After reviewing the voter's *Application to Vote* and verifying their photo identification or the *Affidavit of Voter Not in Possession of Photo ID*, process the voter in the EPB by following these steps:

1. Scan the barcode on the voter's driver's license or identification card or type the voter's name into the DLN/Name field, entering the last name first. If typing, select the correct voter and then you must select **Lock this voter record**. Note: If the voter is in the correct precinct, scanning the barcode will automatically lock in the voter.
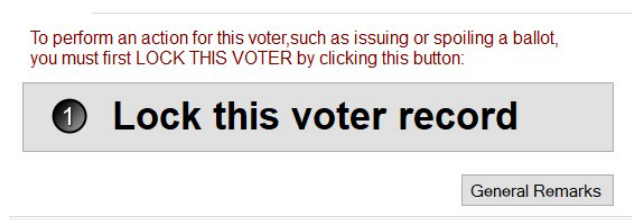
2. Verify the voter's information on the *Application to Vote* matches the data in the EPB.
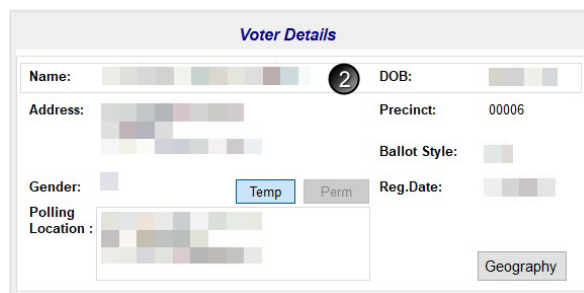
3. Select Regular ballot.
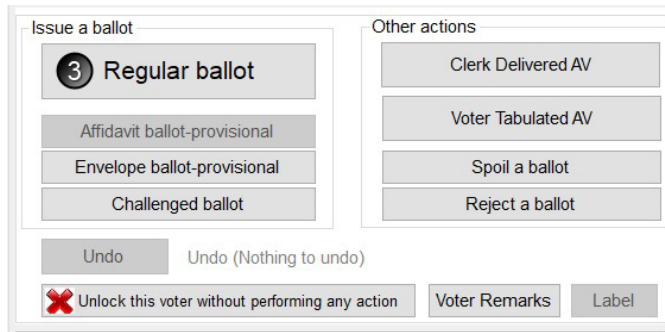
4. Enter the next available ballot number in the **This ballot number will be assigned** box. (This number will auto fill after the first number for the ballot style has been entered).

5. Select OK, and the voter's name will now be added to the List of Voters.
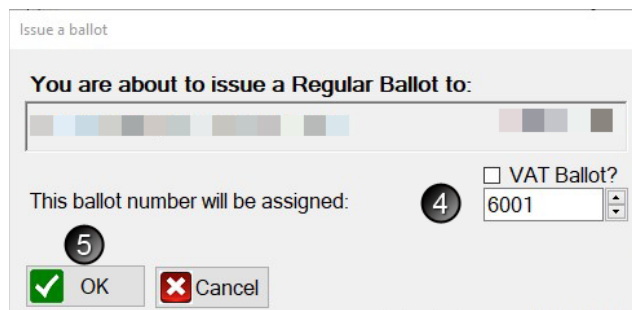
Record a Voter Not in Possession of Photo ID

1. Select the up-arrow button next to the Affidavits of Voter Without Photo ID (or, select the field, delete the number that's there, and type the new total).

Verify the ballot was issued

Select OK on the confirmation window (if enabled). After you assign the ballot, the main screen returns. Three places verify the ballot was processed in the EPB software (as displayed below).

Process Voter with Status Flags(s)

Some voters have status flags (yellow caution symbol next to their name, formerly a red question mark) that need to be addressed prior to issuing a ballot.

Absentee Ballot sent by clerk

A voter with this status flag was sent an absentee ballot. The voter must surrender the absentee ballot or complete the Affidavit of Lost or Destroyed Absentee Ballot after approval from the Clerk. Process as a Regular ballot and select through the warning. Place the AV ballot in the Local Clerk envelope. Do not issue a ballot unless the Clerk has confirmed that the voter's absentee ballot was not received.

Absentee Ballot [00060551] sent by clerk--Voter must surrender ballot or submit affidavit.
VOTING STATUS: Did not vote in precinct.
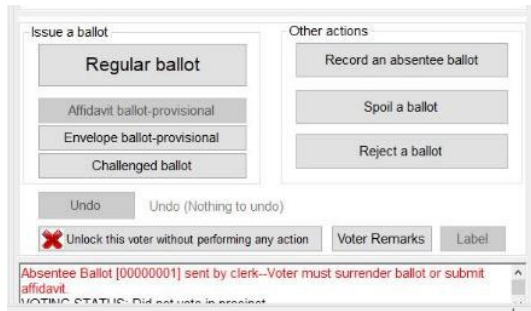
Absentee Ballot sent/received by clerk

A voter with this status flag was sent an absentee ballot and returned it to the Clerk. **DO NOT** issue this voter a ballot as they have already voted. In the extremely rare case of a clerical error (such as if a ballot was recorded in QVF for the wrong voter), only after approval from the clerk a ballot may be issued.

The following warning will appear if an election inspector attempts to issue a ballot to a voter who has already returned their AV ballot.
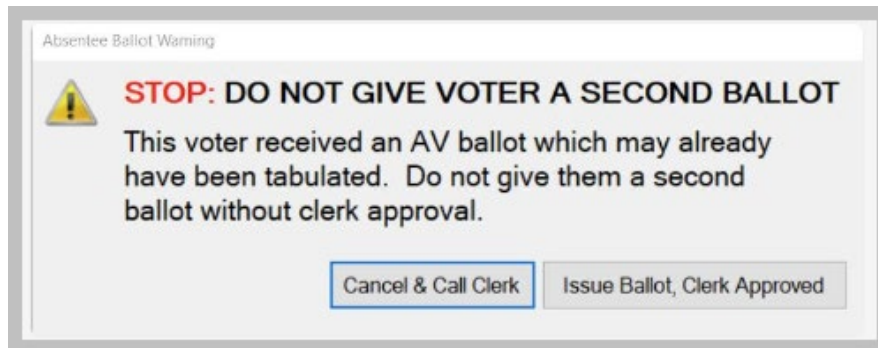
Voter's status is Challenge: Age, Citizenship Formal or Residency Formal

A voter with any of these status flags has been formally challenged, they must complete the challenge process before being issued a challenged ballot. Seek assistance from the precinct chairperson to complete this process. The EPB processing is the same as a regular voter except Challenged ballot is selected in the Issue a ballot box. A CHAL will appear next to the voter's name after processed.

> Voter's Status is CHALLENGED: CITIZENSHIP - FORMAL
> Election inspector action required: This voter has been formally challenged for
> CITIZENSHIP - FORMAL - contact the chairperson to complete the formal challenge

> Voter's Status is CHALLENGED: RESIDENCY - CONFIRM
> Election inspector action required: Have the voter verify his or her address before
> issuing a ballot.

Must show ID before voting (Federal Requirement)

A voter with this status flag must show photo ID or a paycheck, government check, utility bill, bank statement, or a government document which lists his or her name and address (if no photo ID but provides one of the documents listed above, must sign the *Affidavit of Voter Not in Possession of Photo ID* as well) prior to being issued a ballot.

> Election inspector action required: This voter must show ID to meet the Federal ID
> Requirement -- refer to the flipchart for further instruction if the voter does not have
> picture ID.

Voter's Status is V: Address Unclear, Confirmation Notice, or Surrendered License

A voter with either of these status flags must verbally confirm the address listed in the EPB. If the voter does not confirm the address, the procedure for voters that have moved must be taken.

> Voter's Status is TO BE VERIFIED: CONFIRMATION NOTICE
> Election inspector action required: Have the voter verify his or her address before
> issuing a ballot.

> Voter's Status is TO BE VERIFIED: SURRENDERED LICENSE
> Election inspector action required: Have the voter verify his or her address before
> issuing a ballot.

Voter's Status is V: Confirm Citizenship

A voter with this status flag must verify their citizenship by signing the Application to Vote. If the voter does not complete the Application to Vote, DO NOT issue a ballot.

> Voter's Status is TO BE VERIFIED: CITIZENSHIP
> Election inspector action required. Have the voter verify citizenship by signing the
> Application to Vote before issuing a ballot.

Voter's Status is V: Sign Registration Card

This voter must sign a voter registration form prior to being issued a ballot.

Voter's Status is TO BE VERIFIED: SIGN REGISTRATION CARD
Election inspector action required: Have the voter sign a voter registration form before issuing a ballot.

To issue a Challenged ballot:

Pull the voter's record up in the EPB software, lock it in if necessary and:

1. Select Challenged ballot.

2. Verify the ballot number being issued is correct or enter the ballot number and select OK.
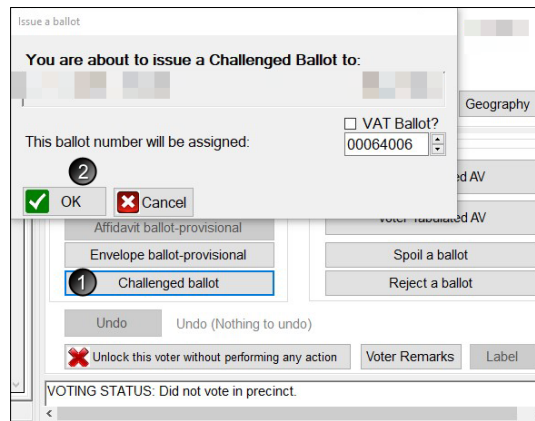
Process a Spoiled Ballot

To spoil a ballot:

Pull the voter's record up in the EPB software by typing the voter's name into the DLN/Name field, entering the last name first, select the voter's name, select Lock this Voter Record and:

Select Spoil a ballot.

1. Select OK. The software will automatically enter the ballot number you are spoiling.

2. Select OK.

3. Select OK.

After the ballot is spoiled, the regular ballot process must be used to issue a new ballot to the voter. (Refer to page 10 for instructions.)

Once the process is complete, verify the recording was done properly by looking at the Voter Status screen and the List of Voters.

Find a Voter Not Appearing on This Precinct list

Find a Voter in Other Precinct in Other Tab

Election inspectors can look up voters throughout the jurisdiction, not just in the precinct they are working. If the voter does not pop up after a search, select the **Other** tab. If the voter is registered to vote within the

jurisdiction, select their name and view their polling location. Be sure to select the **This Precinct** tab before processing the next voter.

Process an Unlisted Voter with a Receipt

When a voter is not found under the **This Precinct** tab or the **Other** tab, and they were registered by the local clerk's office after the e-Pollbook was downloaded for the election, they must present the Clerk's Office Voter Registration Receipt. The voter must be added to the EPB from the Unlisted tab, and then a ballot can be issued per the instructions on the receipt.

Clerk's Office Voter Registration Receipt

JACQUELINE BEAUDRY - CITY CLERK
ANN ARBOR CITY
301 E. HURON ST.
ANN ARBOR MI 48107-8647

Registration approved by:_____

ELECTION: 4/12/2019

The following voter was registered to vote on 4/5/2019 and should be issued a **CHALLENGED** ballot:

To add a voter to the list:

1. Select the Unlisted tab.

2. Select New.

3. Enter the voter's information.

4. Select the "Voter Receipt" box to enable the option and the cursor automatically moves to the License field.

5. If the voter has a DL/PID, scan the barcode on the DL/PID to add the id number and the Unlisted Voter window will automatically close. The ID number can also be hand-typed, then select OK.

After the voter is added, issue a regular ballot and assign a ballot number.

Add an Unlisted Voter without receipt

The chairperson, with the assistance of the Clerk (and utilizing the *Election Inspectors' Procedural Manual,* also known as the *Flipchart,* and *Missing Voters Flow Chart* listing options including a provisional ballot) should determine whether the citizen is eligible to vote. If it is determined that the citizen is a qualified voter and should vote in that precinct, they must be added to the list.

Follow step 1-3 in the *Process an Unlisted Voter with a Receipt* section starting on page 17.

    4. Select OK.

After the voter is added, a ballot number must be assigned.

The Clerk will provide guidance on the type of ballot to issue the voter.

Important note: You must manually enter ballot numbers for unlisted voters, and the next regular ballot issued (for that ballot style) will need to be adjusted; <u>it will not auto advance correctly</u>.

Record an Absentee Ballot

If absentee ballots are processed in the precinct **and the Clerk has instructed entry into the EPB software versus using the paper**

Addendum List of AV voters, follow the instructions below to process the ballots in the EPB software.

To record an absentee ballot:

Pull the absent voter's record up in the EPB software by typing in their name (last name first) in the Voter Search on the left-hand side of the screen, select on the voter, and lock in the voter:

1. Select Clerk Delivered AV.

2. Verify ballot number (enter if not auto filled) is the same as assigned and select OK. **NOTE:** If processing a FWAB or electronic MOVE or ACCESSIBLE ballot, simply accept the regular AV ballot number assigned or enter the AV ballot number assigned by the clerk.

Verify the recording was done properly by looking for AV next to the voter's name and the Voter Status screen.

Absent Voters at the Polls

When the (EPB) indicates that a voter has been issued an AV ballot, there are three scenarios:

1. **New:** The voter may tabulate their AV ballot.

2. The voter may surrender their ballot or sign an affidavit if unable to surrender and be issued an in-person ballot.

3. If the voter has previously returned their AV ballot to the clerk, they have already voted and are not issued a ballot.

The following status flag indicates that the voter has been sent an AV ballot but has NOT returned it yet, thus making them potentially eligible to receive a new ballot at the Election Day precinct.

> Absentee Ballot [00060551] sent by clerk--Voter must surrender ballot or submit affidavit.
> VOTING STATUS: Did not vote in precinct.

Let the voter know that they had been issued a ballot by the clerk and ask the voter if they would like to tabulate or surrender the ballot.

New: Voter tabulates their AV ballot.

The voter **must** complete an Application to Vote, including showing their photo ID or sign Affidavit of Voter Not in Possession of Photo ID.

The election inspector **must** request the voter expose only the ballot stub with number to confirm ballot number with voter's record in the EV EPB/EPB.

Once the ballot number is confirmed, record the ballot number on the Application to Vote, record the ballot in the EPB, provide an in-person secrecy sleeve to the voter, and direct the voter to a voting booth.

1. In the EPB, pull up the voter's information either by scanning the barcode on their driver's license/state ID or by typing their name in the Voter Search field.

2. Select the Voter Tabulated AV button.
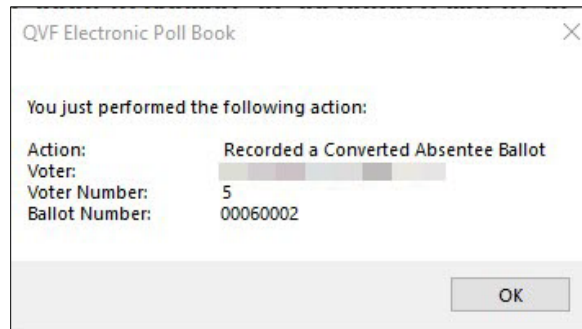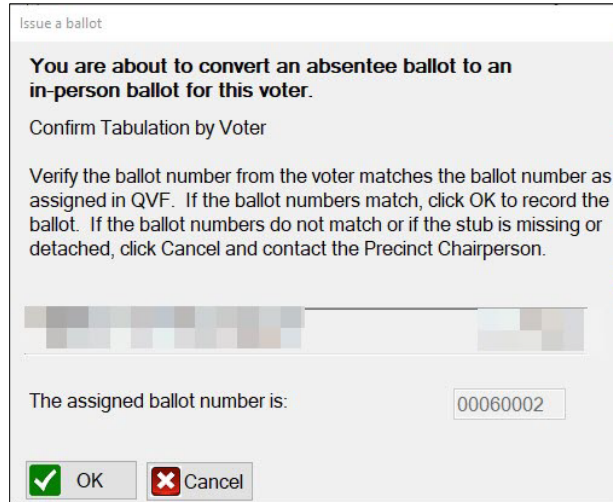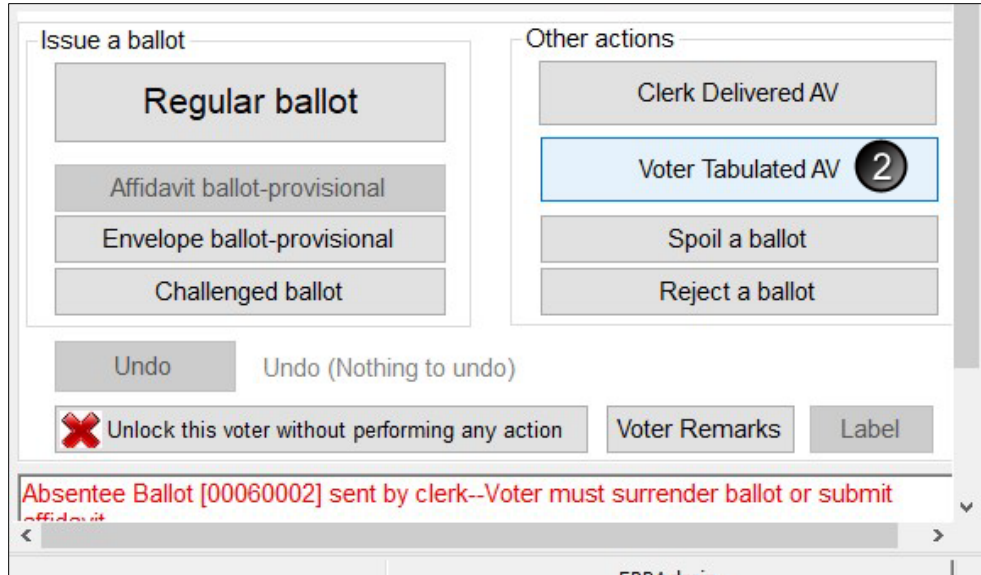
Before the voter tabulates their AV ballot, the inspector near the tabulator will:

1. Check the ballot stub number again.
2. Remove the stub.

3. Place the Application to Vote on the spindle.
4. Retain the AV ballot envelope materials to be returned to the local clerk.

Note: If a voter prefers to tabulate their AV ballot issued by the clerk and the ballot stub is missing, the voter must surrender their AV ballot and be issued a regular ballot at the Election Day precinct.

Voter surrenders their AV ballot

The voter may surrender their ballot or sign an affidavit if unable to surrender and be issued an in-person ballot. If the voter would like a new ballot, the following process applies:

Note: If the voter did not receive their issued AV ballot, or it has been lost/destroyed, have them fill out the Affidavit of Lost or Destroyed Absentee Ballot. **Call the clerk to confirm that the ballot has not been received in the clerk's office**.

If the voter has surrendered their AV ballot or signed the affidavit, and you have confirmed that the clerk has not received a ballot from the voter, the voter's AV ballot will be rejected in QVF. <u>Do not spoil the voter's AV ballot in the EPB.</u> The voter can then be issued a regular ballot at their Election Day precinct resolving the voter status flag.

Voter already returned their AV ballot

The following status flag indicated a voter received an AV ballot and returned said ballot to the clerk's office. Therefore, the voter has already cast a ballot for this election, and they are ineligible for an Election Day ballot.

Absentee Ballot [00060529] sent/received by clerk--Do not issue ballot.
VOTING STATUS: Did not vote in precinct.

If the voter doubts that the voting status is correct, contact the local clerk and have them confirm the information within QVF. The voter may have sent the AV ballot several days ago and has simply forgotten.

If the voter insists that they have not returned an AV ballot, have them contact the clerk.

The following warning will appear if an election inspector attempts to issue a ballot to a voter who has already returned their AV ballot.

Absentee Ballot Warning

⚠ **STOP: DO NOT GIVE VOTER A SECOND BALLOT**
This voter received an AV ballot which may already
have been tabulated. Do not give them a second
ballot without clerk approval.

Cancel & Call Clerk   Issue Ballot, Clerk Approved
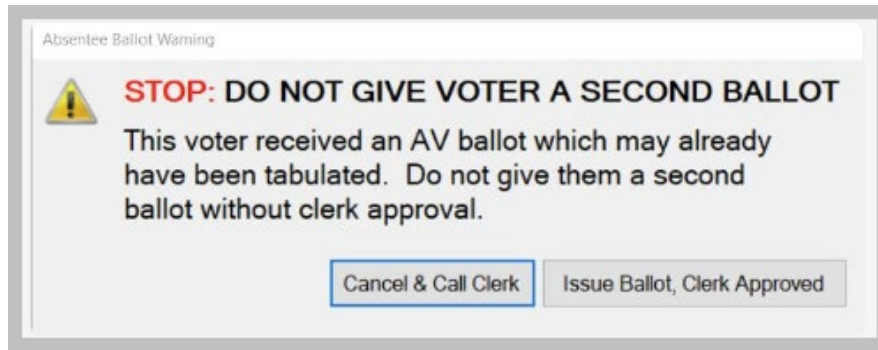
It is an extremely rare circumstance that a ballot would be marked as sent and received in error for a voter. **Do not issue the voter a ballot unless the clerk specifically tells you the voter has not yet voted in this election.**

A variation of this flag may appear if a voter returned their AV ballot to their local clerk, and it was rejected due to a missing or non-matching signature. Voters can correct this by curing the signature at the local clerk's office or by voting in-person at their polling place.

If this message appears, contact the clerk to verify that the voter has not already cured the signature on their AV ballot. If not, then the clerk will update the rejection of the ballot in the QVF to reflect the voter voting in-person, and the voter should then be issued a regular ballot.

Record a Voter Assist Terminal (VAT) Ballot

To record VAT ballots in the Electronic Pollbook, search for the voter in the EPB as usual and select a ballot type to record. When assigning this voter's ballot number, indicate that it is a VAT Ballot by checking the VAT box. This action tells the system to use the blank ballot numbering sequence when auto advancing. If it is the first VAT ballot of the day, enter the first ballot number of the blank ballot stock. VAT ballot numbers will advance automatically like other ballots do when the Auto Advance option is enabled and after the first number is entered.

To record a VAT ballot:

1. Select the button for the kind of ballot being assigned (Regular, Provisional, or Challenged).

2. Add a checkmark to the VAT box.

3. If this is the first VAT ballot of the day, enter the ballot number in, otherwise, confirm the VAT ballot number matches the sequence and select OK.

Other EPB Functions

Correcting Mistakes

If a voter is selected in error, simply select **Unlock this voter without performing any action** to return to the main screen.

If an entry mistake occurs, whether the wrong ballot number or the wrong voter was issued a ballot, using the **Undo** function will aid in correcting the mistake.

To correct a mistake:

1. Search for the voter, using the DLN/Name search box.
2. Select the voter.
3. Select Lock this voter record.
4. Select Undo.
5. Select Yes.
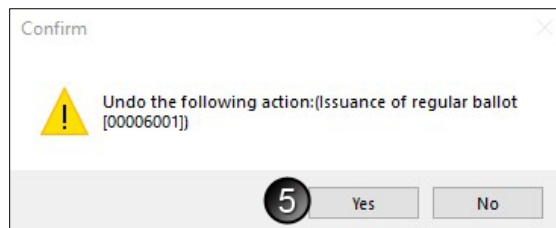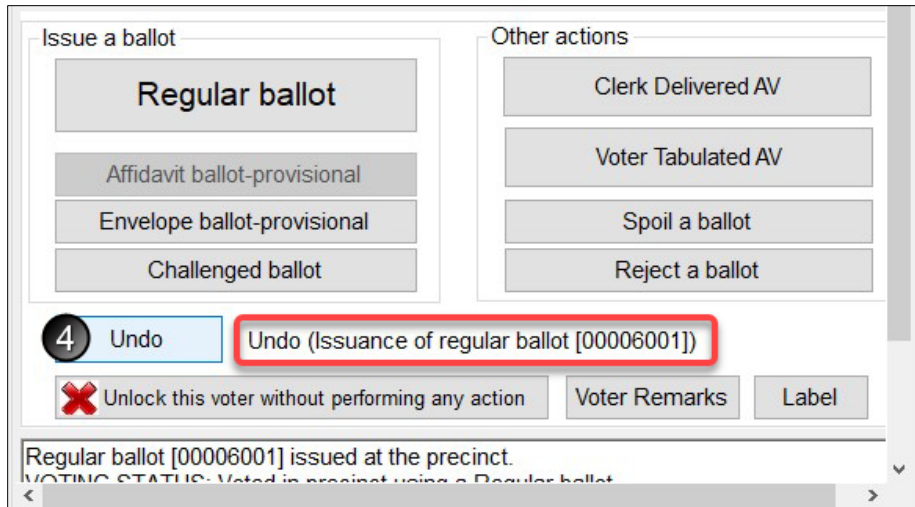
Notice the action you are undoing is in brackets next to the Undo button and in the confirmation box. Use the *Application(s) to Vote* to ensure you are making the correction properly. The Undo function should <u>not</u> be used to attempt to fix major mistakes. For example, if several ballots have been issued out of sequence, correct this type of error with a remark and by ensuring the next voter is correct from that point forward.

Important note: The Undo feature is <u>NOT</u> for spoiling ballots (refer to *Spoiled Ballots* section on page 15 for detail). If you have questions as to when the Undo function is appropriate to use, consult your local Clerk.

Refer to FAQ #1 on page 44 if a voter was issued an incorrect ballot style.

Make a Remark

Any time a correction is made, a remark should be entered. In addition, remarks should be made throughout the day to document events that happened in the polling place that are significant. There are two types of remarks, general and specific. Be sure to use the correct type based on the comment you need to make.

To make a general remark:

1. Select File (or the *General Remarks* button below the Lock this voter record and skip to step 3).

2. Select Remarks.
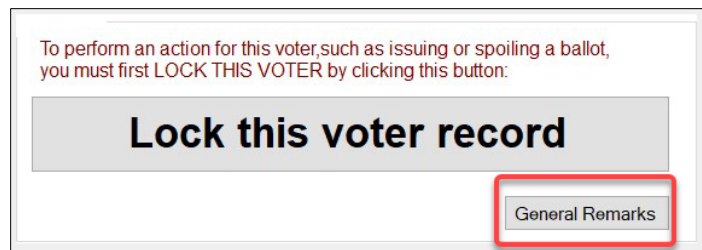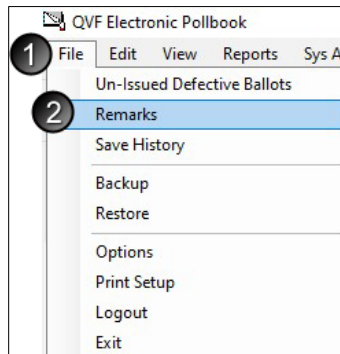
3. Select New.

4. Enter Remark. The EPB automatically records the date and time of the entry; however, if entry of the remark is delayed from the time the event occurred, include the time the event took place in the remark.

5. Select OK.

6. Select Close.
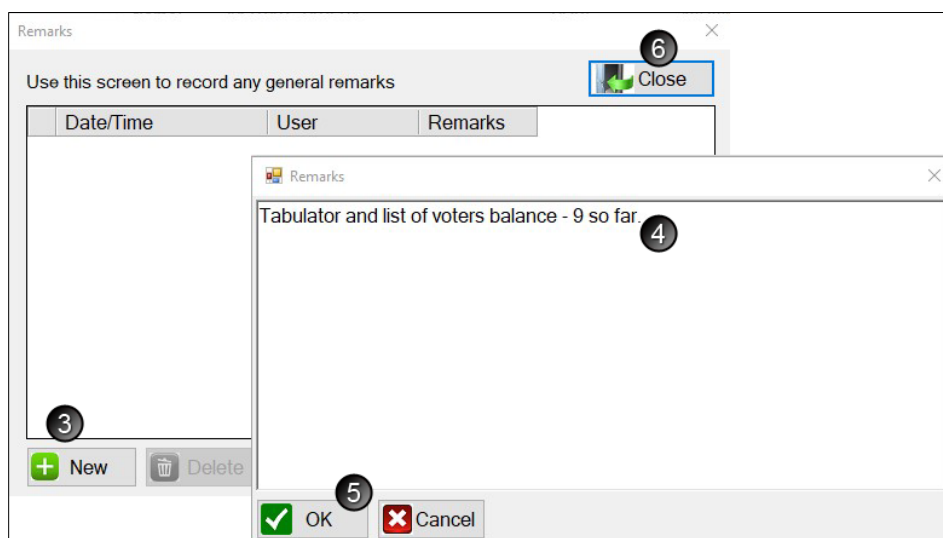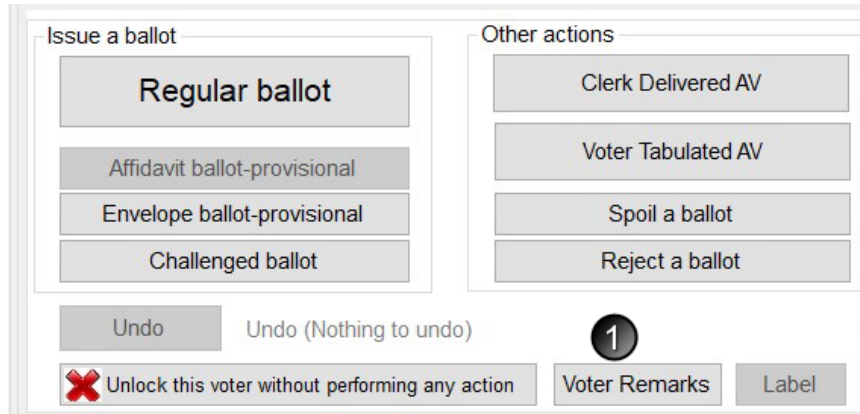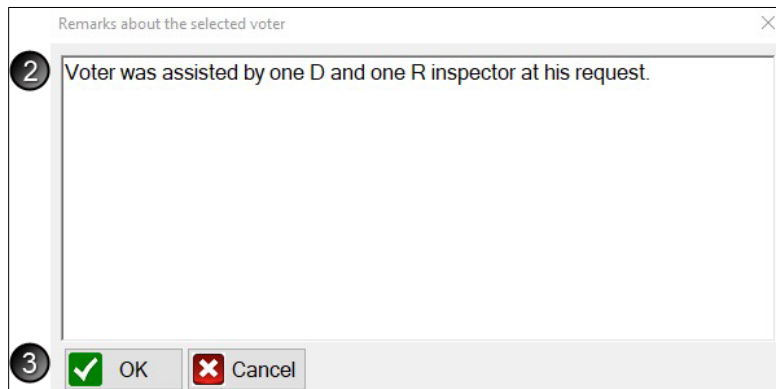
To make a voter remark:

Pull the voter's record up in the EPB software, by typing the voter's name into the DLN/Name field, entering the last name first, select Lock this Voter Record and:

1. Select Voter Remarks.

2. Enter Remark. The EPB automatically records the Voter Name, Voter Number, and date and time of the entry. Add the time if recording was delayed.

3. Select OK.

If there are no other actions to perform on that voter, unlock the voter and process the next voter.

Reject a Ballot

A ballot is rejected only in a situation where a voter will not be issued a new ballot. Valid reasons for rejection are:

1. **Exposure**.

2. **Missing stub/ballot number does not agree**.

3. **Ballot was left in booth/voter did not tabulate**.

If any of these situations arise, a voter <u>may not</u> be issued a replacement ballot. The ballot must be rejected.

To Reject a ballot:

Pull the voter's record up in the EPB software, by typing the voter's name into the DLN/Name field, entering the last name first, select Lock this Voter Record and:

1. Select Reject a ballot

2. Verify ballot number is the same as assigned.

3. Select OK.
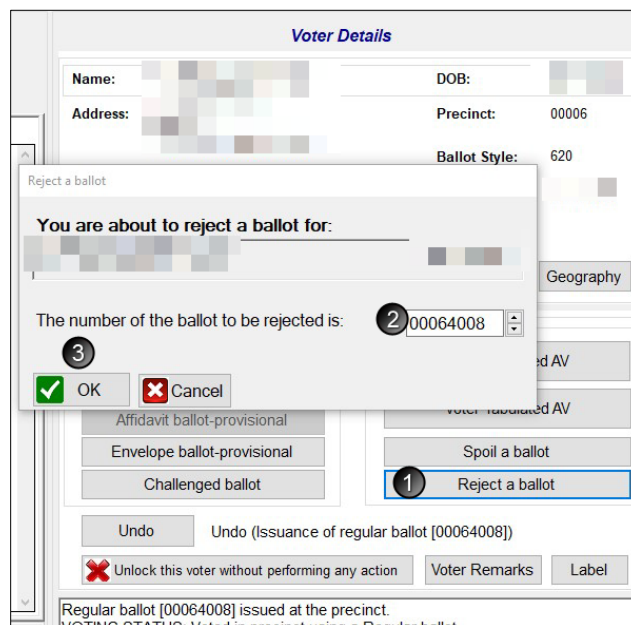
Record a Voter Remark including the reason for rejection (refer to page 26 for making a voter remark).

The EPB software will not allow another ballot to be issued to a voter with a rejected ballot. If a ballot was mistakenly rejected, the rejection must be removed by using the Undo button.

Mark Unissued Ballots Defective

If a ballot becomes unusable and it is within the number range being used, record it defective in the EPB software to balance at the end of the night.

To record defective ballots:

1. Select File

2. Select Un-issued Defective Ballots
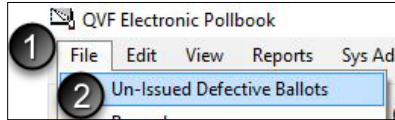
3. Select Render Ballots Defective

4. Select the ballot style, enter the ballot number range, and record the reason the ballot is defective.

5. Select OK

6. Select Close
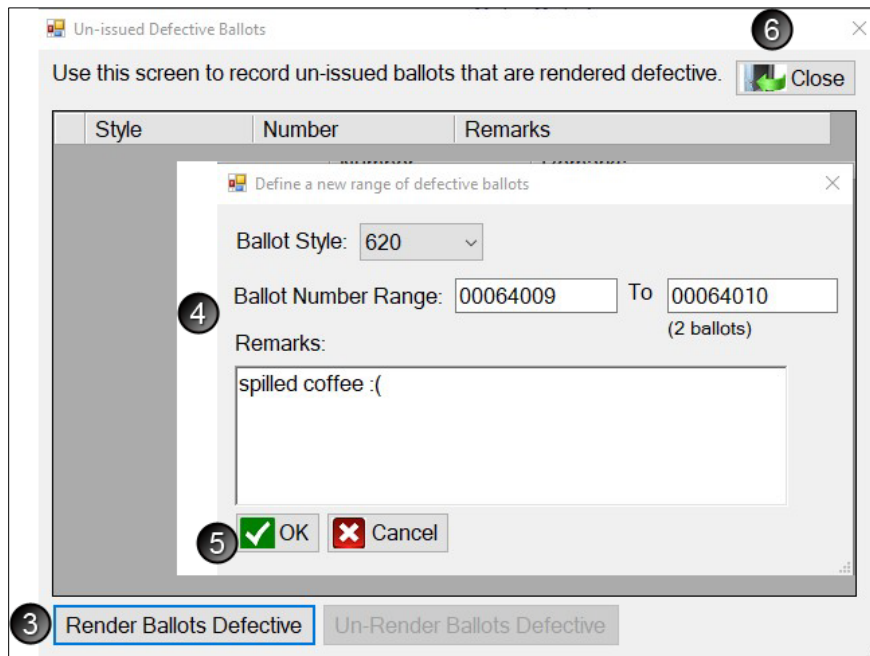
Note: When a ballot is marked defective, the ballot number of the next ballot will need to be selected in EPB as autoincrement won't pick this up.

Understand Timeout Features

For security reasons, the EPB software will logout a user after thirty minutes of inactivity. This can be avoided by moving the mouse and/or selecting into

the DLN/Name field during periods of inactivity. If the EPB software logs out the user, simply reenter the Username and User Password and select Enter.

Switch Users
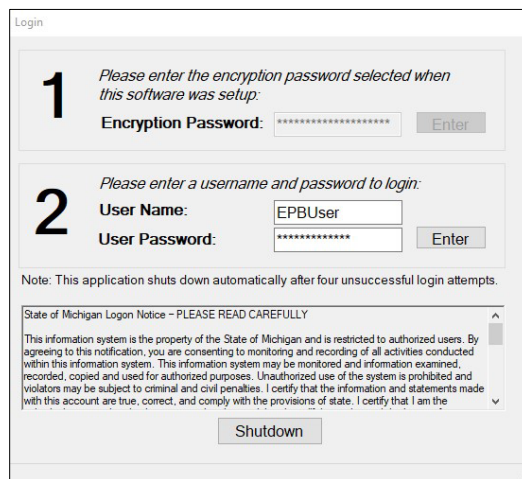
Each user must have their own login to access the EPB and use their own login when running the EPB. Having login credentials for each user helps clerks know who was running the EPB when an issue does occur.

To switch users, simply use the Logout function by:

1. Select File
2. Select Logout
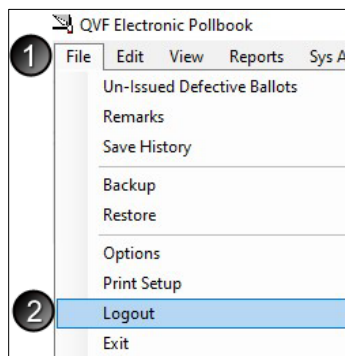
Then log in with the new username and password.

The current user is displayed in the lower right-hand corner of the screen:

Regular ballot [00064001] issued at the precinct.
VOTING STATUS: Voted in precinct using a Regular ballot.

EPBUser
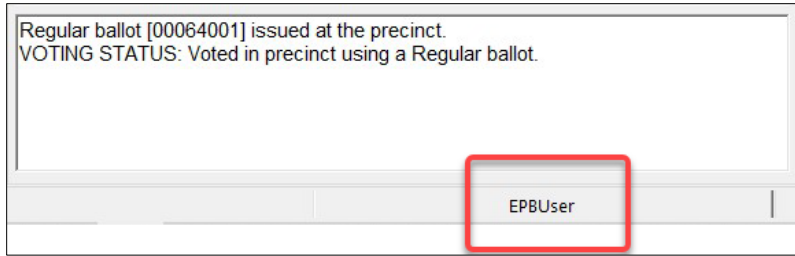
Restore the Database

If the laptop fails and the EPB needs to be reinstalled on a new laptop on Election Day, the Restore feature will reload all the information entered before the last backup. The only voter data missing would be entries made in the EPB since the last backup. Those voters that need to be recorded in the EPB can be added back using the Applications to Vote. An administrator username and password must be obtained from the Clerk for the initial login when the software is re-installed.

Once the EPB software has been installed onto the new laptop, login to the EPB software, and perform the following steps:

1. Select File.
2. Select Restore.
3. Select the button at the end of the path field.

QVF Electronic Pollbook

① File   Edit   View   Reports   Sys A
      Un-Issued Defective Ballots
      Remarks
      Save History
      Backup
② Restore

Restore   ✕

                                    [ ] Close

This feature allows you to restore a backup that was previously created using the "Backup" feature located under the File menu. When you use this feature, the system will COMPLETELY DELETE your current data and REPLACE it with the data contained in the selected backup file. You should only do this if feel your current data has been damaged severely enough so you would be willing to lose all changes that were saved since your last backup was created.

Backup File: ③
D:\ElectionDate\EPB.accdb   [...]

                    Restore

4. Make sure the encrypted flash drive is logged into and selected (Removable Disk E:) Drive letters may vary.

5. Select (double select) the [ElectionDate] folder.

6. Select Open.
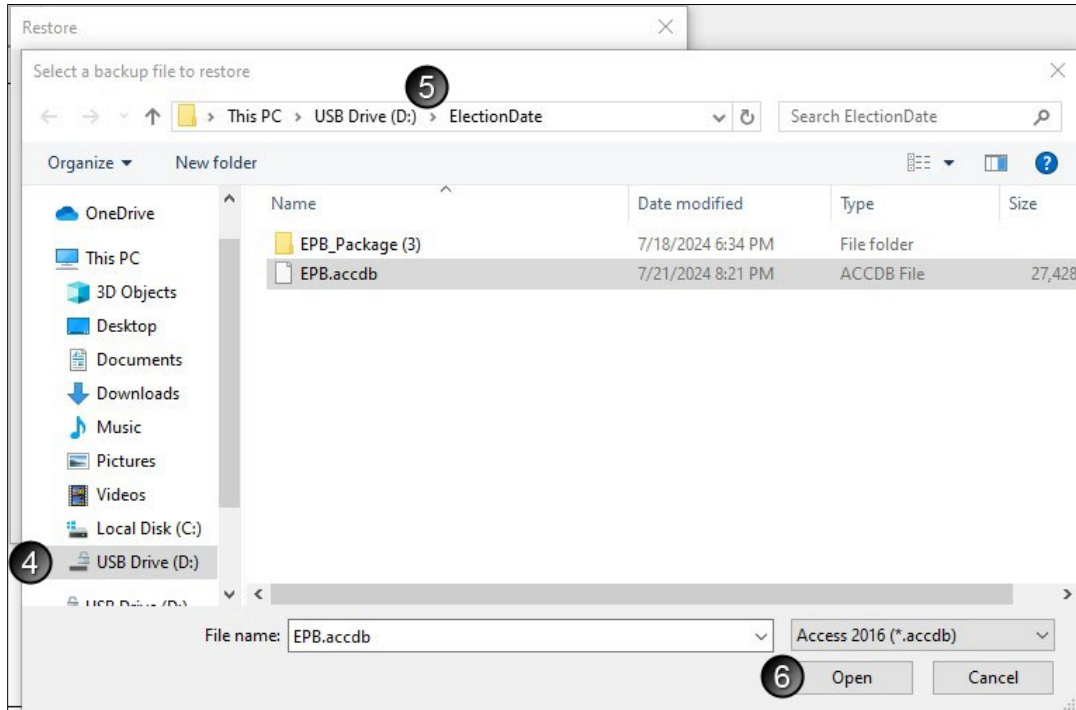
7. Select Restore.

8. Select Yes.

9. Select OK.

QVF Electronic Poll Book

ⓘ Restore finished successfully. Please shutdown the EPB and reopen it to apply the database restore.

9 OK
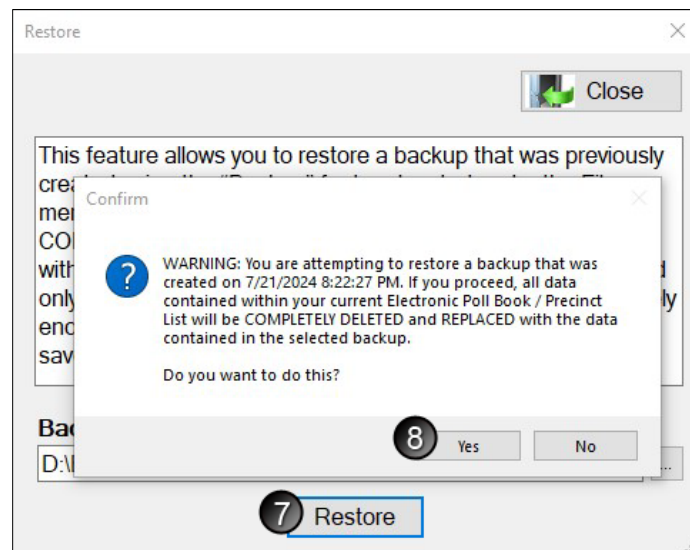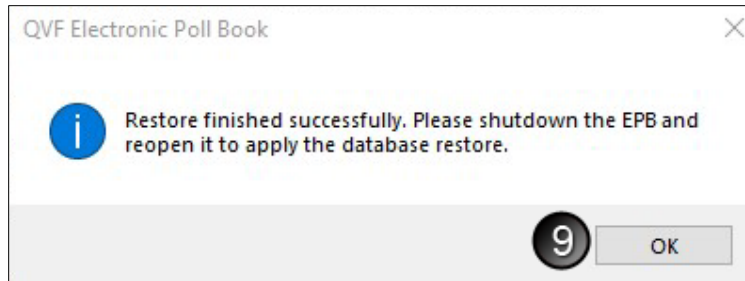
After restoration is complete, the election inspectors should log out of the EPB. (In a multi-precinct jurisdiction, an administrative user must log in to select the inner precinct again, then log out.) An inspector can then log back in with their username and password, review the Options under File>Options, and continue to work.

If time elapsed between the last backup and the restoring of data, use the Application(s) to Vote to re-enter voter(s) and process new voters.

III. Election Day: Close the Polls

After the close of polls on Election Day, data processed in the EPB software must be saved one last time to the encrypted flash drive and reports must be generated to complete the paper binder pollbook. The EPB software generates the three reports necessary for completion of the paper binder pollbook/official record of the precinct in just a few steps. Those reports include the Ballot Summary, the List of Voters, and the Remarks report.

Review and complete the next six required steps. If your receiving board prints the reports, simply save each report to the encrypted flash drive.

1. Save one last **Backup** file

2. Save and print the **Ballot Summary** Report

3. Save and print the **List of Voters** Report

4. Save and print the **Remarks** Report

5. Save **Voting History** (This is a frequently missed step, so please pay extra attention here!)

6. Look at the files saved on the flash drive and go back to save anything that was missed.

Save Backup

After all voters have been processed in the EPB, perform one last **Backup** to ensure all data is saved to the encrypted flash drive. If you get an error that the drive or path is not accessible, log into your flash drive and try again. Refer to page 6 for detailed instructions.

Save and Print Reports

Save and print Ballot Summary Report

The **Ballot Summary** documents the total number of ballots assigned to the precinct and how each ballot was used. Items F: (Spoiled Ballots), G: (Rejected Ballots), and I: (Provisional Envelope ballots) auto populate in the Ballot Summary Report from those actions that were attributed to voters throughout election day. The designated inspector enters the remaining numbers, and the EPB software will calculate and balance the **Ballot Summary.** Type in numbers carefully and use the Tab key to move between fields.

To complete the Ballot Summary:

1. Select Reports
2. Select Ballot Summary
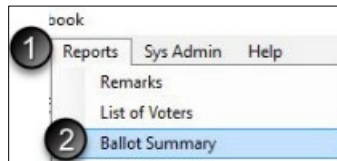
Enter the Number of ballots at close of polls:

3. (D) Enter Number of ballots tabulated from the Tabulator Public Counter reading.

4. (E) Enter the Number of AV ballot envelopes delivered to precinct which did not contain a ballot or were not processed for any reason, if absentee ballots are being processed in the precinct. *If absentee ballots are not being processed in the precinct, this box will already be completed with a 0.*

Ballot Summary Report

NUMBER OF BALLOTS DELIVERED TO PRECINCT:

A: Number of unvoted ballots delivered to precinct:

Style	Starting No.	Ending No.	Count
A	00064001	00065600	1600
VAT	00090001	00091000	1000

(3) Delete

Total = 2600

B: Number of AV return envelopes received by board: 2 **(4)**

Number of AV ballots tabulated in person by voters: 1

C: Total: 2603

NUMBER OF BALLOTS AT CLOSE OF POLLS:

List of Voters

#	Assigned To	Ballot
1		00064001
2		00064002
3		00064003
		00064005
4		00064004
5		00060002
6		00064006
7		00060001
8		ET000002
9		00090001
10		00064007
11		00064008
12		00064011

5. (D) Enter Number of ballots tabulated from the Tabulator Public Counter reading

6. (E) Enter the Number of AV ballot envelopes delivered to precinct which did not contain a ballot or were not processed for any reason, if absentee ballots are being processed in the precinct. If absentee ballots are not being processed in the precinct, this box will already be completed with a 0.

7. (H) Enter the Number of ballots used by election inspectors for ballot duplication.

8. (J) Enter the Number of Unused Ballots by entering the Starting Number (the next ballot that would be issued) and the Ending Number of the unused ballots. If using more than one ballot style, tab to create a new line and repeat the process until all styles are listed. Tab out of the box or place the cursor in a different box to make the totals calculate.

Next, SCROLL DOWN to L. AND STOP AND LOOK! – L _must_ be 0. If L is not 0, double check items 3-8 and ensure everything was entered correctly. If there is a known reason for not balancing and it is unable to be resolved, a _DETAILED_ _Remark_ must be made to explain to the Board of Canvassers why the precinct does not balance.

9. Select Preview

NUMBER OF BALLOTS AT CLOSE OF POLLS:

(5) D: Number of ballots tabulated (Enter Tabulator Public Counter reading) — 11

(6) E: Number of AV ballot envelopes delivered to precinct which did not contain a ballot or were not processed for any reason — 0

F: Number of ballots reissued to voters who spoiled their ballot at the polling place (spoiled or defective ballots) — 3

G: Number of ballots rejected — 1

(7) H: Number of ballots used by election inspectors for ballot duplication — 1

I: Number of provisional envelope ballots issued — 0

J: Number of UNUSED BALLOTS:

(8)

Style	Starting No.	Ending No.	Count
A	00064013	00065600	1588
VAT	00090002	00091000	999

🗑 Delete

Total = 2587

K: Total of Lines D, E, F, G, H, I and J — 2603

L: Difference — 0

(9) 🔍 Preview

List of Voters

#	Assigned To	Ballot
1		00064001
2		00064002
3		00064003
		00064005
4		00064004
5		00060002
6		00064006
7		00060001
8		ET000002
9		00090001
10		00064007
11		00064008
12		00064011
13		

Total = 12

The Ballot Summary report will pop up after selecting Preview. Be sure to review the summary to ensure all information was entered correctly and that the summary balances (Line L = 0). Line L may appear on a second page, select the arrow to view the next page if necessary.

At this point, the **Ballot Summary** must be saved to the encrypted flash drive. If you print reports in the precinct, print the Ballot Summary now. Otherwise, the reports will be printed at the Receiving Board.

To save the Ballot Summary:

1. Select the disk icon and PDF.

2. Double select the [ElectionDate] folder <u>in the encrypted flash drive</u>. Drive letters may vary.

3. Select Save.

After the Ballot Summary has been saved, print the report (if applicable), close out of the preview screen, and close the Ballot Summary screen as well.
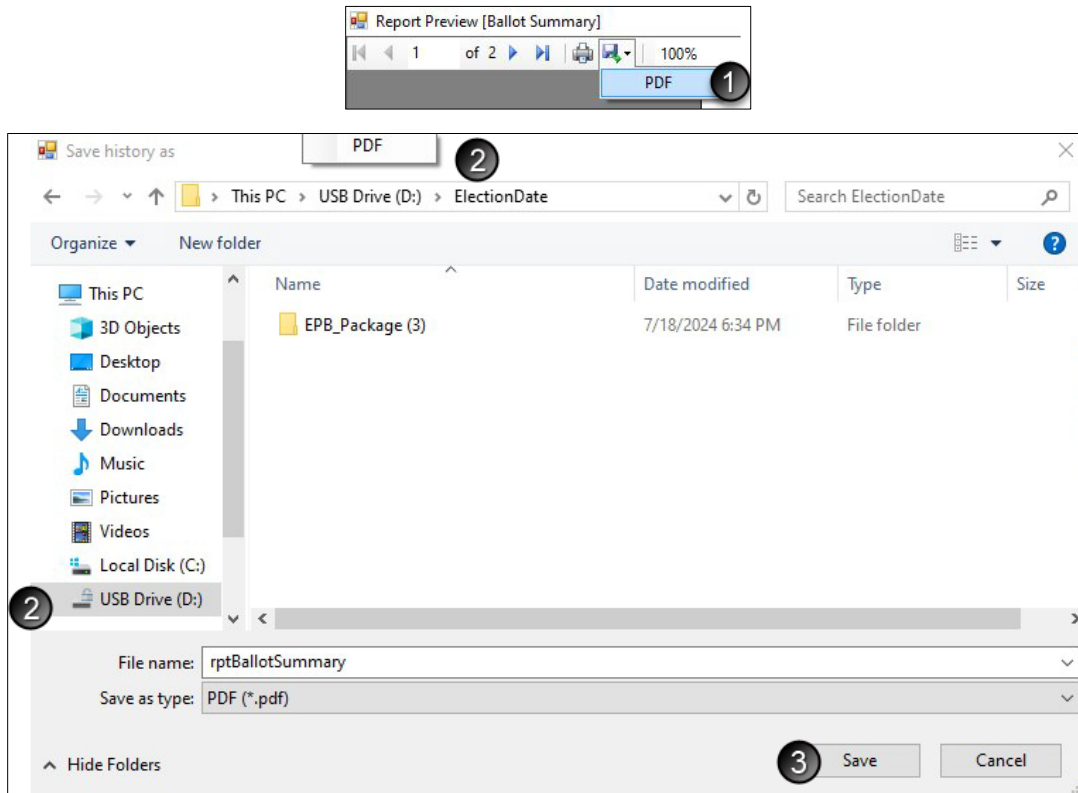
Save and Print List of Voters Report

To save the List of Voters:

1. Select Reports

2. Select List of Voters
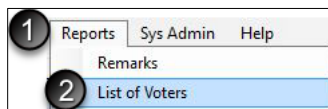
3. Select the disk icon and PDF.
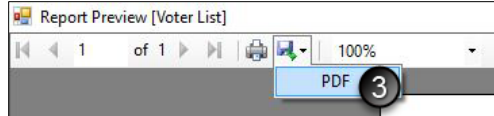
4. The [ElectionDate] folder selected for the Ballot Summary should automatically pop up. <u>Always check to make sure you are in the encrypted flash drive before selecting Save.</u>
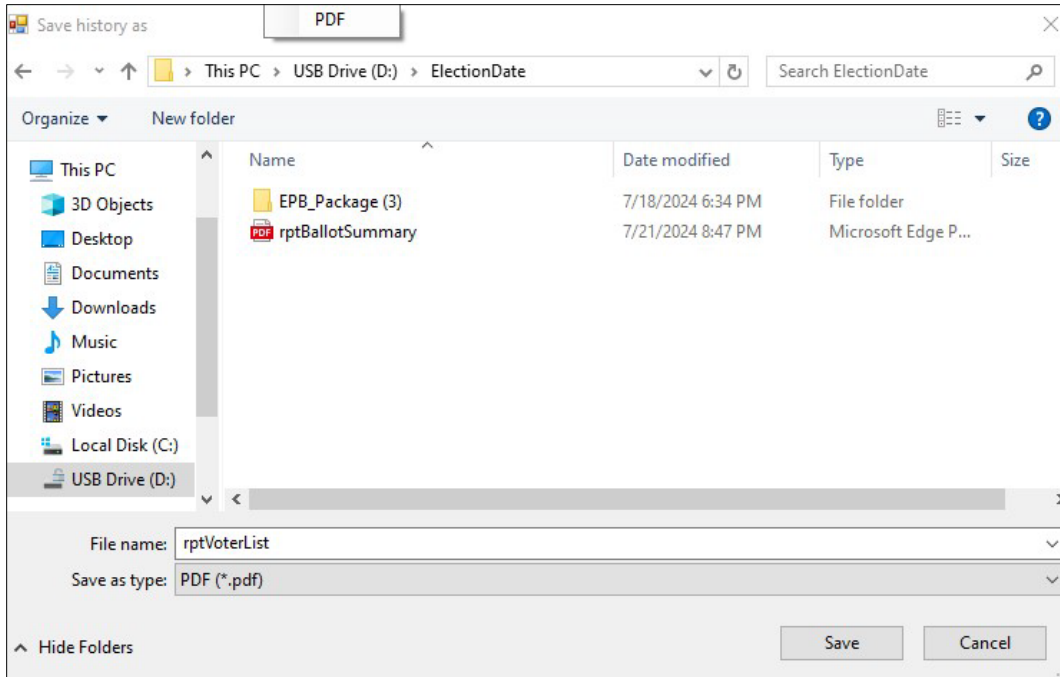
After the List of Voters has been saved, print the report (if printing in the precinct) and close the preview screen.

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PRECINCT 00006

LIST OF VOTERS

#	Voter Name	Ballots	Remarks
1		00064001	
2		00064002	
3		~~00064003~~	Spoiled
		00064005	
4		00064004	
5		00060002	Converted AV
6		00064006	Challenged
7		00060001	Absentee Ballot
8		ET000002	Absentee Ballot
9		00090001	
10		00064007	
11		00064008	Rejected
12		00064011	

Save and Print Remarks Report

Remarks recorded in the EPB software using the General Remarks and/or Voter Remarks are saved in a report also and must be saved to the encrypted flash drive. Remarks should be printed either in the precinct or at the Receiving Board.

To save the Remarks report:

1. Select Reports.

2. Select Remarks.
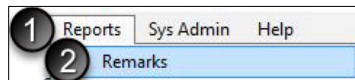
3. Select the disk icon and PDF.
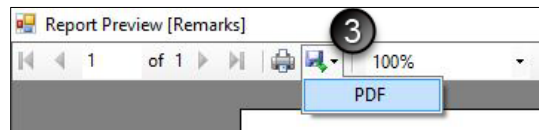
4. The [ElectionDate] folder selected for the last two reports should automatically pop up. Always check to make sure you are in the encrypted flash drive before selecting Save.

Note: There must be one recorded Remark for the report to save.

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Precinct 00006

REMARKS

Date / Time	User	Voter #	Voter Name	Remarks
7/21/2024 8:09:40				Tabulator and list of voters balance - 9 so far.
7/21/2024 8:12:12		10		Voter was assisted by one D and one R inspector at his request.
7/21/2024 8:16:24		11		rejected because voter left without tabulating ballot, now one more voter on list of voters than ballots in tabulator.

After the Remarks report has been saved, print the report (if using printers in the precinct) and close out of the preview screen.

Save Voter History: Redirection Action Required!

After all other reports are saved, save the voter history to the encrypted flash drive. This file is necessary for the clerk to update the voter registration files in QVF recording who voted on Election Day.

To save Voter History:

1. Select File.

2. Select Save History.
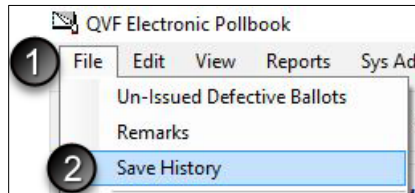
3. Redirect the file by selecting on the flash drive under. Always check to make sure you are in the encrypted flash drive before selecting Save. The file name should say epb_history with no preceding d:\

   If d:\ is still in the File name, select the cursor at the beginning of the File name field and use the Delete key to delete the d:\

4. Select Save.
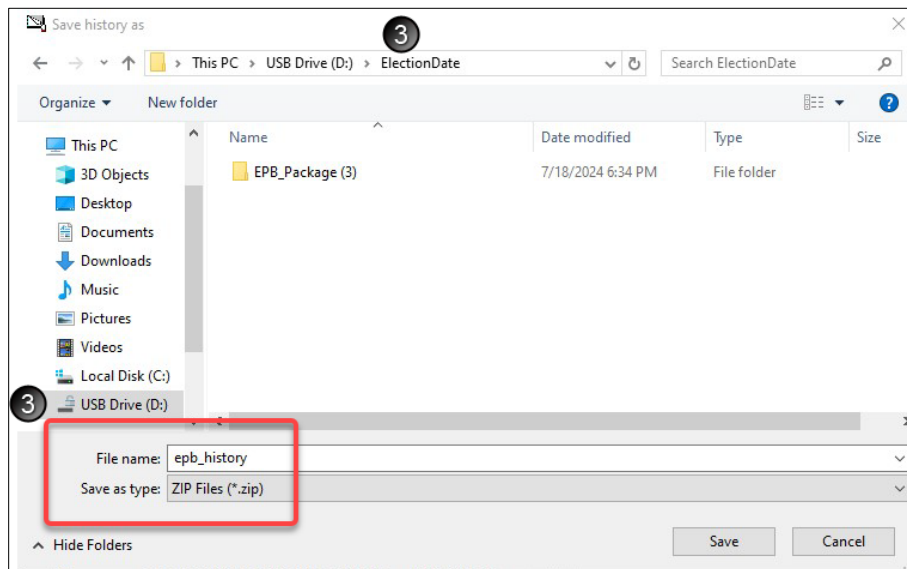
Please note: the history file is now a compressed .zip file, no longer a .csv file type.

You will no longer be able to open or proofread this file, only upload it back into QVF.

A user double-selecting to open the file will encounter the following error.
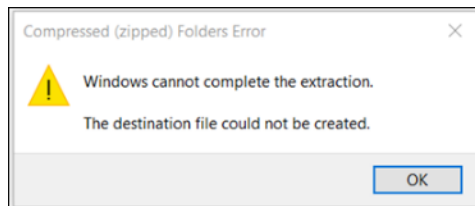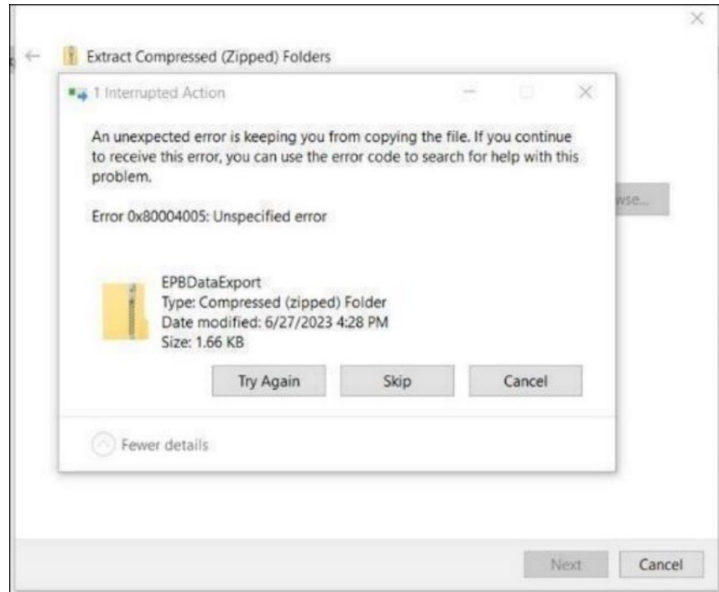
Ensure Files are on Flash Drive

To verify files have been saved on the encrypted flash drive:

1. Select the file folder icon to open Windows File Explorer

2. Select Removable Disk (D:). Drive letters may vary
3. Select/double select the [ElectionDate] folder
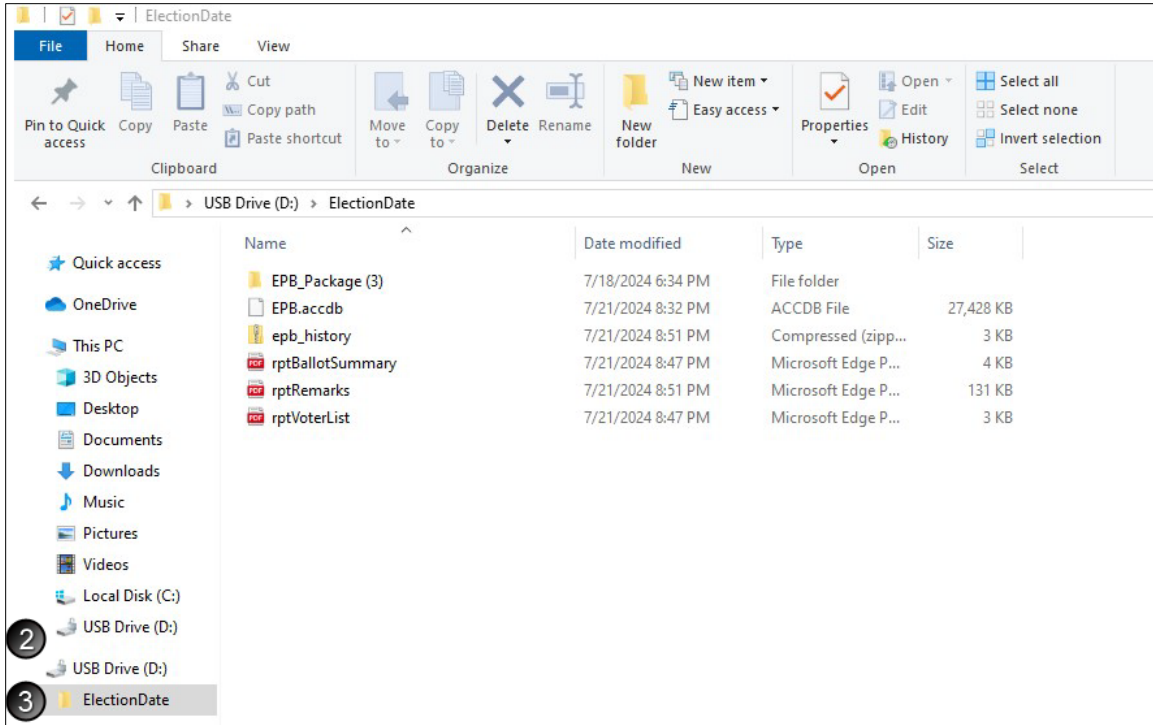
4. Review files saved to the flash drive.

Required files saved to the flash drive

File Name	File Type
EPB Backup	.accdb
epb_history	.zip
rptBallotSummary	.pdf
rptRemarks	.pdf
rptVoter List	.pdf

Additional files you may encounter in your folder

File Name	File Type
EPB_Package	File folder
EPB_Package	Compressed (zipped)

Once all reports have been saved, close all programs and shut down the laptop. Return all items to the case <u>except</u> the encrypted flash drive. The

encrypted flash drive must be placed into the container the Clerk recommends, <u>sealed</u> (either an envelope with a red paper seal or an approved container and the appropriate seal), and returned to the Clerk on election night.

Helpful Hints

Screen Resolution

Optimal screen resolution for the EPB laptop has been 1366x768. If your list of voters is not displaying on the right-hand side of your screen, the resolution needs to be adjusted.

To adjust the screen resolution:

1. Go to the desktop and select/right-select.

2. Select Display Settings.

3. Scroll down to Scale & layout, navigate to Display resolution, select 1366x768 from the drop down menu.

Additional Resources

Your clerk may have provided you with a set of EPB Procedural Videos downloaded onto this laptop. These provide quick reminders of how to perform various Election Day tasks.

Frequently Asked Questions

1. The wrong ballot style was issued to a voter. How can it be corrected?

Answer: If using different ballot numbers for each ballot style, no action is required except to remark the situation in the **Remarks**. If your ballot styles are numbered with the same ballot number series, open the voter's record, undo the issuance of the ballot with the incorrect ballot style, and reissue a Regular Ballot with a modified number using a letter before the number (for example, X0000012) and remark the situation in the **Remarks.** This is done so it does not appear that two voters received the same ballot number on the list of voters.

2. If using the QVF AV module, do I have to extract the EPB software from QVF **after 4:00 p.m.** on the Monday before the election to get the most up to date absent voter information?

Answer: Yes, this is now required by law. Jurisdictions with over 50 precincts are required to do so on the Saturday prior to Election Day **after 2:00 p.m.**

3. Is there a way to update absent voter activity on the encrypted flash drive or in the Voter List portion of the EPB software after it has been installed on the laptop?

Answer: No, not at this time. Also, remember that election inspectors record AV ballots in the EPB software (unless using the addendum list or an AVCB), but they must **not** record AV ballots in the EPB software before the opening of the polls.

4. Do I have to print the paper binder pollbook reports in the precinct?

Answer: No, in fact, having the Receiving Board print the reports is highly recommended. Reports must be delivered to the Receiving Board on the encrypted flash drive in a sealed container by two election inspectors of opposing political party after the polls close. The Receiving Board then prints the reports and completes the paper binder pollbook.

5. Do I need to use a particular type of printer with the laptops?

Answer: No. Most printers will work with the laptops if the proper printer driver is installed. Complete the installation as soon as possible to verify the laptop and printer are compatible.

6. Do I have to have a hardcopy precinct list and full paper binder pollbook with a List of Voters, Ballot Summary and a Remarks section at each precinct if I use the EPB software?

Answer: Under the terms of your User Agreement, you are required to have a hardcopy Precinct List and a hardcopy List of Voters, Ballot Summary, and Remarks Section available for immediate delivery to the precinct in the event of a system failure. One may be printed from the Elections eLearning Center; refer to *Reverting to Paper Poll Book Guide*.

7. The EPB software allows me to issue a ballot to a voter who has already returned an absent voter ballot. Why is this permitted?

Answer: Under rare circumstances, an absentee ballot may have been recorded incorrectly in QVF. Election inspectors **MUST** contact the local clerk to verify the status of the absentee ballot before issuing a ballot to a voter who, according to the EPB software, has already returned an absent voter ballot.

8. How do I change the time and time zone on my laptop?

Answer: Right-select on the time and date, select Date and Time Settings. Here you can select the appropriate time zone. If you need to adjust the time, turn off the "Set time automatically" option, then select the Change button. Once the time is corrected, you can turn the "Set time automatically" option back on.

9. Do I have to use the EPB software to process absent voters in the precinct?

Answer: No, you may use the Addendum List of Absent Voters method and add the list to the paper binder pollbook.

10. What if an absent voter does not return their ballot? Or if the absent voter surrenders their AV ballot in the polls? Do I need to indicate this in the EPB software?

Answer: No. Only process an absentee ballot in the voter's record when the ballot has been received for processing. If the voter has surrendered their absent voter ballot, simply issue a precinct ballot using the normal process. The Spoil a ballot function should never be used for a clerk-delivered absent voter ballot in the EPB software.

11. Will Unlisted Voters transfer to QVF after the Voter History has been updated?

Answer: Some may, and some may not. Unlisted voters without a driver's license or state ID number will not transfer into QVF after Voter History has been updated. The registration of an Unlisted voter must be added to QVF if it has not been already added, and then Voter History for the Unlisted voter can be entered manually in QVF under Voter>Voting History.

12. Is there a way to view all actions taken in the EPB on Election Day?

Answer: Yes. An Activity Log Report can be viewed at any time by selecting Reports > Activity Log Report. This Report may be printed as well.

13. Is there a way to convert the List of Voters into a .csv file?

Answer: Not at this time.

14. What if my laptop "freezes up" and stops responding?

Answer: First, try to close and reopen the EPB program, using Ctrl + Alt + Delete if necessary to use the Task Manager to end the task and close the EPB application. If that doesn't work, you may restart the computer. Remember to log back into the flash drive as well as the EPB program before you begin working again.

Glossary

Antivirus Software is a software program that helps protect the laptop from viruses that could damage or shut down the machine. Please use Windows Defender.

Backup is a file that replicates and saves entered data for use in the event of a system failure.

Ballot Style is a designation to distinguish amongst ballots in a precinct that has a District split. For example, Precinct One represents voters from County Commission District 5 and 7. If the County Commission position is on the ballot, Precinct One will have two ballot styles, one for District 5 and one for District 7.

BitLocker is free encryption software from Microsoft. For the E-Pollbook, it is software on flash drives issued by the State after 2015, used to protect data on a flash drive with a password.

Data Security is the means of ensuring that data is kept safe from corruption and that access to it is suitably controlled. Thus, data security helps to ensure privacy. It also helps in protecting personal data.

e-Pollbook Software is a computer software program created in the Qualified Voter File (QVF) to be loaded on a laptop and used in the precinct on election day to record voters and the ballots they are issued.

Encryption is the process of transforming information using an algorithm to make it unreadable to anyone except those possessing the password.

Encrypted Flash Drive is a digital storage device that has the ability to encrypt data and keep the data secure.

Encryption Password is a password created to allow access to the encrypted e-pollbook software once downloaded from QVF.

Election Geography is a function of QVF where precinct combinations and ballot style names can be set for an election. The information entered in the QVF Election Geography module will then tell the EPB software which precincts have been combined and the preferred name for ballot styles in split precincts.

Lockout is an e-pollbook software feature that disallows the issuance of a ballot number more than once per ballot style.

Receiving Board is a board established by the local Election Commission responsible for ensuring 1) all ballot containers delivered to the clerk after the polls close are properly sealed 2) all seal numbers are properly recorded and 3) the number of names entered in the Poll Book balances with the number of ballots counted in the precinct. For more information visit michigan.gov/elections and select on "Information for Election Administrators."

Strong Password is a password that contains a combination of 8-16 characters, mixed case with at least one number.

V-Safe 100 is the name of the encryption software installed on earlier versions of the State issued flash drive prior to 2015.

Quick Reference Checklist

Election Day – Election Inspector Setup

Preparing the EPB for Opening the Polls

- ❐ Power laptop on
- ❐ Make sure the laptop is not connected to the internet and is in Airplane mode with wifi disabled
- ❐ Insert the encrypted flash drive into a USB port
- ❐ Log into the encrypted flash drive
- ❐ Log into the EPB software
- ❐ Change options and setup users as recommended by the Clerk, e.g., allow the recording of AV Ballots
- ❐ Perform the first EPB backup to establish correct file path to the flash drive.

Throughout the Day

- ❐ Assign ballots and ensure all voters are documented in the EPB software
- ❐ Verify status problems
- ❐ Backup the EPB software regularly
- ❐ Record Remarks as necessary

Closing the Polls

- ❐ Perform one final Backup
- ❐ Complete the Ballot Summary Report, ensure it balances (L=0) and save to the encrypted flash drive
- ❐ Save the List of Voters Report to the encrypted flash drive
- ❐ Save the Remarks Report to the encrypted flash drive
- ❐ Save Voter History file to the encrypted flash drive
- ❐ Ensure all files are on the encrypted flash drive
- ❐ Print reports (if applicable)
- ❐ Deliver encrypted flash drive under seal in the Clerk-recommended container to the Receiving Board or Clerk

Post Close of Polls

Receiving Board

- ❐ Print Ballot Summary
- ❐ Print List of Voters
- ❐ Print Remarks