

Idaho Procedures 2009

The AutoMARK Ballot Marking Device

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Document Firmware Upgrade

All AutoMARKs have been upgraded to firmware release 1.1.2258 during preventative maintenance by the vendor.

Verify state certified firmware and software versions are correct for ES&S AutoMark Voting System Release 1.1.2258.

AutoMark Voter Assist Terminal, (VAT) version 1.1.2258
AutoMark Information Management System, (AIMS) version 1.2.18.

Document the firmware and software version numbers for each unit by recording the date, the unit number, the ES&S technician and responsible county observer. See "Documentation" below.

The firmware version number is on the initial boot up screen. The software version number is found on the maintenance screen with the unit in test mode.

Ballots and PCMCIA Flash Cards

Develop a timeline and sign off procedures with the vendor to ensure the timely delivery of PDF ballot proofs, printed ballot proofs, audio ballot proofs and test AutoMARK flash cards and return of approved flash cards to those counties that are not burning their own copies.

Allow adequate time for possible changes and required pre-election testing.

Ballot acceptance procedures should assure that the printed ballot is correct, that the AutoMARK on-screen and audio ballots are correct, and all ballots match the state sample ballot.

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Continued Ballots and PCMC Flash Cards

Ballot files and flash cards are to be treated as ballots and protected with physical security measures and chain of custody documentation. All documentation should be available for review in the event of an election contest.

Test Before Transport

Testing each unit before transport to the polls is required. Pre-election testing before transport to the polls is necessary to ensure units are functioning properly. Testing ensures ballots, flash cards, print calibration and screen calibration are correct and that defective machines are not delivered to the polls.

Follow the certified Pre-Election Day Checklist provided by the vendor. The checklist and other import documents are available on the information website at:

<http://www.idsos.idaho.gov/elect/clerk/clerkinfo.htm>.

Document pre-election testing and the readiness of each unit for transport to the polls, detail any problems for resolution with the vendor, date and sign-off by county staff responsible. Retain pre-election testing documentation with ballot files for 22 months.

Test at the Polls

All units must be set up and functioning at the polls as required by HAVA.

Transport may effect calibration. Test units before the polls open. Election workers are to be at the polls in time to set up and test the AutoMARKs to ensure the units are working properly when the polls open.

Develop a plan for testing at the polls for both print calibration and screen calibration. Print calibration and screen calibration are different procedures which must be made clear to election workers during training. Both calibration procedures are necessary for the unit to function properly.

Testing at the polls can be performed by county personnel, a set up team or by a well trained poll worker. Follow the certified checklist provided by the vendor and document any problems for resolution. Documentation is essential to ensure equipment performance issues are properly taken care of and to identify any training issues that may need to be addressed.

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Trouble Shoot

If a unit does not operate properly at the polls, poll workers are to follow the troubleshooting checklist provided by the vendor and document their findings. Documentation is essential to correctly identify and resolve problems. Instruct poll workers to call the election office if the unit does not operate properly after following the checklist and documentation of issues. The unit should be turned off but left in place until a county worker or vendor representative can repair or replace the unit.

Authorized election workers and equipment support personnel should wear county authorized identification when working with election equipment at the polls to maintain public confidence.

Arrow Ballot Counties

The AutoMARKs self-calibration option only applies to machines utilizing Oval ballots. AutoMARKs that use Arrow ballots must be calibrated by a technician during the pre-election preventative maintenance cycle.

Documentation

Develop a spread sheet to track machine maintenance, performance and security of your AutoMARKs. See the sample spread sheet/sign-off forms attached. This documentation is essential, especially in the case of a contested election. Add any additional items that may be appropriate for your county.

Document any maintenance required. Be detailed in descriptions of performed maintenance, ask questions, and track performance of each unit to facilitate repair and replacement of units if necessary. Counties now own these machines and are responsible for maintenance and performance as required by HAVA.

Create dedicated ballot preparation computer files to track ballot preparation and audio ballot preparation.

Retain ballot preparation documentation with election materials for 22 months.

Retain maintenance, performance and upgrade documentation for the life of the machine.

Clerk's Information Web Site

<http://www.idsos.idaho.gov/elect/clerk/clerkinfo.htm>.

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Continued Clerk's Information Web Site

Testing procedures are available from the vendor and also posted on the clerk's information website including:

- ES&S AutoMARK Pre-Election Day Checklist
- ES&S AutoMARK Election Day Checklist
- Idaho AutoMARK Poll Worker Checklist
- Idaho AutoMARK Poll Worker Troubleshooting Guide
- AutoMARK Accuracy Verification Procedures

Poll worker training materials, public relations materials and other helpful information will be posted on this site.

Check this site often for updates from the state and from the vendor.

Certified AutoMARK Testing Procedure at the Polls

All federally required AutoMARK ballot marking devices must be available and functioning at the polls as required by Public Law 107-252, the Help America Vote Act.

Idaho AutoMARK Poll Worker Checklist

Follow and document these procedures to assure the AutoMARK ballot marking device is operating properly at the polls on Election Day and your polling place is in compliance with Federal law.

- Open lid and raise AutoMARK screen and lower ballot tray.
- Locate the audio headphone jack on the front lower-right panel (below the keypad) and plug in the headphones.
- Plug the power cord into a power connection in the back of the unit and the other end of the cord into a nearby AC power source.
- Turn the security key located in the front of the unit to the **ON** position and wait for AutoMARK to load.
- Check the on-screen ballot. Confirm that the ballot races on the currently inserted compact flash card match the ballot that you were trying to insert. If they do not match then you need to replace your compact flash card or your ballot. Call election office for assistance immediately.
- Turn the security key located in the front of the unit to the **TEST** position and wait for AutoMARK to load.

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Continued Idaho AutoMARK Poll Worker Checklist

- Select **Test Ballot Print** using the touch screen button on the menu.
- Select the **Enable print calibration** check box.
- Insert unmarked ballot.
- The AutoMARK will print an “all fill” ballot. AutoMARK **fills all the ovals** and prints the name of each candidate on the ballot.
- Check each oval. Make sure all ovals are filled and aligned properly.
- If a calibration suggestion is presented, press **Yes** to recalibrate the printer.
- Repeat previous step, running 2 more unmarked test ballots through to ensure proper printer calibration. There should be 3 ballots total that run through the “all fill” test successfully.
- Go back to the test Menu page and select **Calibrate Touch Screen** using the touch screen button on the menu.
- Press the **Calibrate** button to start the calibration.
- Carefully press and briefly hold your finger on the center of the target then release. Repeat as the target moves around the screen.
- When prompted to do so, **tap** the screen to save your calibration settings. If you do not touch the screen within 30 seconds, the new calibration settings will not be saved. An on-screen time alerts you to the time remaining.
- Press **Done** after you complete the calibration.
- Turn security key to the **ON** position.
- The **Insert Your Ballot** screen will display.
- Vote the ballot in any random order. When the ballot is done printing, ballot will exit AutoMARK from tray.
- Insert voted ballot into AutoMARK for a ballot read test.
- If the test is successful, The AutoMARK scans the ballot and displays the Verification Summary Screen. If the test is not successful, The AutoMARK attempts to eject the ballot or displays an error message.

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Continued Idaho AutoMARK Poll Worker Checklist

- Upon successful completion of testing, the AutoMARK is ready to be used by voters. Leave the AutoMARK in the **ON** position and remember to remove keys before voter use.
- Document testing as prescribed by the county clerk and save tested ballots and documentation as directed with election supplies.

If a unit does not operate properly at the polls, poll workers are to follow the troubleshooting checklist provided by the vendor and document the troubleshooting procedure. Documentation is essential to correctly identify problems, improve training and to ensure vendor performance.

Call the election office if the unit does not operate properly after following the checklist and documentation of issues.

The unit should be turned off but left in place until a county worker or vendor representative, wearing identification as an election worker, can repair or replace the unit.

Idaho AutoMARK Poll Worker Troubleshooting Guide

Document the date, the machine number, time, polling place and name of responsible person or technician, the problem and the actions taken to remedy the problem before calling election central for assistance.

Re-starting the AutoMARK can solve many issues. To re-start the system, turn the key to **OFF, wait at least 1 minute before turning the key to ON.** Be patient. The AutoMARK can take a couple of minutes to re-start. Turning the unit on and off quickly can cause more problems.

For any issue not listed, call your election office.

Problem	Possible cause	Solutions
ES&S AutoMARK™ will not turn on.	power cord	Check connections
ES&S AutoMARK™ will not turn on without the AC plug plugged in.	Battery is low	Recharge or replace the battery.
You hear a “hissing” noise coming from inside the ES&S AutoMARK™	The ES&S AutoMARK™ needs to be reset.	Turn the key switch to the Off position Wait 1 minute and turn the key to the ON position
When the key switch is	The ES&S AutoMARK™	Turn the key switch to the

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turned to the Test position, the test mode fails to pull up	needs to be reset.	Off position Wait 1 minute and turn the key to the ON position. If restarting the ES&S AutoMARK™ does not fix the problem, call your election central. Have the ES&S AutoMARK™ serviced.
The ES&S AutoMARK™ “locks” up	The ES&S AutoMARK™ needs to be reset.	Turn the key switch to the Off position Wait 1 minute and turn the key to the ON position. If restarting the ES&S AutoMARK™ does not fix the problem, call your election central. Have the ES&S AutoMARK™ serviced.
The compact flashcard has been removed while the terminal is ON	The ES&S AutoMARK™ needs to be reset.	Turn the key switch to the Off position. Wait 1 minute and turn the key to the ON position. If restarting the AutoMARK™ does not fix the problem, call your election central for assistance.
There is an error reading the compact flash card when the ES&S AutoMARK™ is turned on.	The ES&S AutoMARK™ needs to be reset.	Turn the key switch to the Off position. Wait 1 minute and turn the key to the ON position. If restarting the AutoMARK™ does not fix the problem, call your election central for assistance.
Display is out of focus	Unknown	Turn the key switch to the Off position. Wait 1 minute and turn the key to the ON position. If restarting the AutoMARK™ does not fix the problem, call your election central for assistance.
The ES&S AutoMARK™ does not respond when the	Unknown	Turn the key switch to the Off position. Wait 1 minute

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screen selections are touched		and turn the key to the ON position. If restarting the AutoMARK™ does not fix the problem, call your election central for assistance.
The ES&S AutoMARK™ does not respond when the keypad selections are touched	Unknown	Turn the key switch to the Off position. Wait 1 minute and turn the key to the ON position. If restarting the AutoMARK™ does not fix the problem, call your election central for assistance.
Unable to hear the audio (if programmed)	Headphones are not properly inserted into the audio jack	Ensure the headphones are properly connected to the audio jack. If the headphones are connected properly, turn the key switch to the Off position. Wait 1 minute and turn the key to the ON position. If restarting the AutoMARK™ does not fix the problem, call your election central for assistance.
When attempting to verify the ballot, the markings cannot be read by the ES&S AutoMARK™	The ballot style might not be accepted on that compact flashcard OR the optical scanners in the ES&S AutoMARK™ might be malfunctioning	Ensure the voter used the correct ballot and if not, have them vote on the correct ballot. If the ballot style is acceptable, call your election central. Have the ES&S AutoMARK™ serviced.

For more detail on the operation of the AutoMARK see the ES&S AutoMARK Election Day checklist provided in your election supplies and available on the clerk's information website.

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Sample AutoMARK Tracking Spread Sheet

See attached sample spread sheet also available on the information web site <http://www.sos.idaho.gov/elect/Clerk/clerkinfo.htm>, to assist in developing an on-going plan for documentation of security, maintenance, testing and performance of each unit.