

# **AUTOMARK BALLOT MARKING DEVICE PROCEDURES**

## **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 Compact 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.

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:

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<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 poll workers' checklist provided and document any problems for resolution. Documentation is essential to ensure equipment performance issues are properly resolved and to identify future training issues.

### **Arrow Ballot Counties**

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

### **Trouble Shoot**

If a unit does not operate properly at the polls, poll workers are to follow the troubleshooting checklist provided and document their findings. Documentation is essential to correctly identify and resolve problems.

If a unit does not operate properly after following the troubleshooting checklist, instruct poll workers to call the election office. The unit should be turned off but left in place until an authorized county worker or vendor representative can repair or replace the unit.

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

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## **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>.

Testing procedures and more detailed information is posted on the clerk's information website. Check this site often for updates from the state and from the vendor.

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## Idaho Poll Workers' Election Day Checklist

- Open lid and raise the screen then lower the ballot tray on the front of the unit.
- Locate the audio headphone jack on the front lower-right panel, below the keypad, and plug in the headphones.
- Plug the power cord into the power connection in the back of the unit and the other end into a working AC power outlet.
- Insert the security key and turn the unit to the **ON** position. Wait for AutoMARK to load. Be patient. This process can take several minutes.

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- Insert a blank ballot and check that the on-screen ballot is correct for your precinct. If it is not correct contact your election office immediately.
- Eject the blank ballot.

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- Turn the security key to the **TEST** position.
- Select the **TEST BALLOT PRINT** button on the "Test Menu" screen.
- Important.** Select the **ENABLE PRINT CALIBRATION** check box.
- Insert an unmarked ballot. The AutoMARK prints all ovals.
- When the ballot is ejected, check each oval. Make sure all ovals are filled.
- If a "calibration suggestion" is presented press "**YES**" to recalibrate the printer. Most units will not require print calibration as they are tested in advance.
- Complete the Ballot Print Test with two (2) more blank ballots. A total of three (3) ballots must pass successfully. When complete press "**DONE**".

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- On the "Test Menu" screen. Select **Calibrate Touch Screen**.
- Press the **Calibrate** button to start the screen calibration.
- Carefully press and briefly hold your finger on the center of the target, then release. Repeat as the target moves around the screen.
- Important.** When prompted, "**Tap**" the screen to save the new settings.
- When complete press "**DONE**".

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- Turn the security key to the **ON** position. "Insert Your Ballot" will be displayed.
- Insert a blank ballot.
- Vote each race on the ballot, note your choices, and print the ballot.
- Insert the printed ballot. The unit will display the "Summary Screen".
- Check the summary screen to verify it displays the voted ballot as marked.
- If the Ballot Read Test is not successful, the AutoMARK will eject the ballot and display an error message. Contact your election office.

Upon successful testing the AutoMARK is ready to be used by voters. Leave the AutoMARK in the **ON** position and remove the key. Save tested ballots and test documentation with election supplies.

**If a unit stops working, turn the unit off and leave it set up until a county or vendor representative, wearing identification as an election worker, can repair or replace the unit.**

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### Idaho Poll Workers' AutoMARK Troubleshooting Guide

Before calling your election office for assistance, document the error and actions taken. Include date, time, machine number, polling place and name of technician. For any issue not listed, or if the problem cannot be fixed, call your election office.

Re-starting the AutoMARK can solve many issues. Turn the key to **OFF**, wait at least **1 minute** before turning the key to **ON**. The unit may take a few minutes to re-start.

Problem or Error Message	Probable Causes	Solutions
AutoMARK “locks” up	Unknown	Shut down and restart
AutoMARK will not turn on.	Power cord	Check connections
Unable to hear the audio ballot	Headphones not properly inserted in audio jack. Volume set too low.	Check connections Check volume
The compact flashcard has been removed while unit is ON.	Unit needs to be reset.	Shut down, carefully insert flash card and re-start. Don’t bend pins.
Error reading flash card	1. Unit needs to be reset. 2. Wrong flash card.	1. Shut down and re-start. 2. Call election office.
Unit does not respond when screen or keypad is touched	Unknown	Shut down and re-start.
Ballot rejected, not recognized or misfed.	Wrong ballot for precinct. Ballot inserted incorrectly. Stub attached. Damaged ballot. Feed tray misaligned. Unit optical sensors are dirty.	Call election office. Re-insert. Remove stub. Re-insert or re-issue ballot. Align tray. Clean sensors with compressed air.
Ballot jammed.	Misfed or damaged ballot. Rear unit door ajar. Battery power too low.	Remove ballot. Re-insert. Check rear door. Check connections.
To remove jammed ballot manually.		1. Notify elector ballot must be removed and every effort will be made to protect their privacy. 2. Lift lid behind screen. 3. Push in tabs at rear of tray and lift up to remove tray. 4. Remove jammed ballot. 5. Replace tray, close lid.
To remove jammed ballot in test mode.		Insert security key, turn to test mode and press “Eject Ballot”. Reset to “On” and remove key.
Ballot returned unmarked.	1. Ballot ejected before printing. 2. Elector may have touched “EXIT return Ballot” button. 3. Ballot misfed. 4. Ink supply low.	Re-insert ballot.  Re-insert ballot.  Re-insert ballot. Replace ink cartridge.
Ballot marked on one side only.	Programming error. Ballot misfed. Ink supply low.	Call election office. Issue new ballot. Replace ink cartridge.