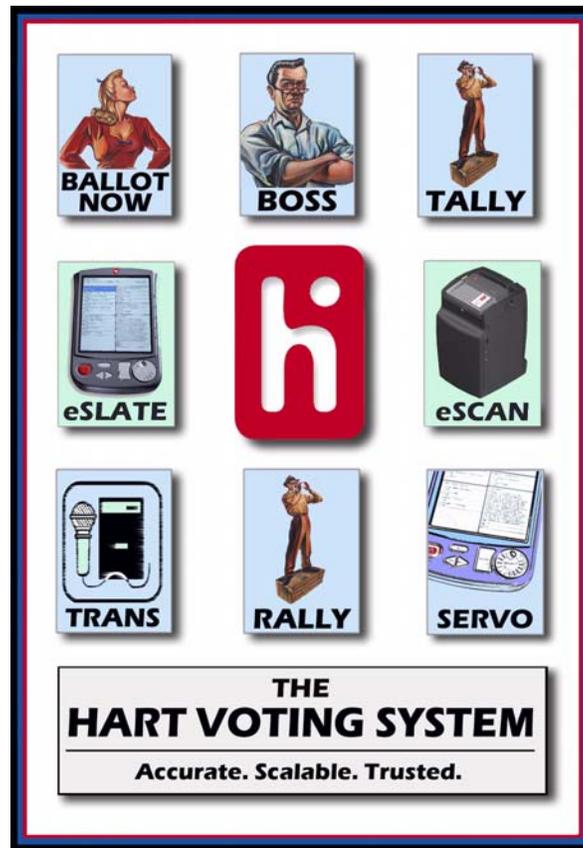

Hart Voting System Train-the-Trainer Training Manual



Hart Voting System
System Version 6.2

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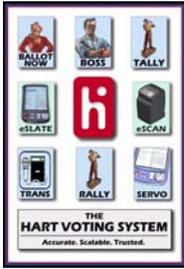


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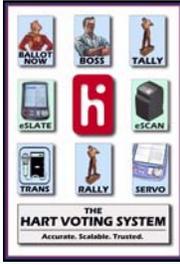
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Chapter 1

Getting Started

Introduction

This document is the Hart Voting System instructors' guide for successfully implementing Hart Voting System-related poll worker training. Use this manual to plan and prepare successful training events.



Since the *Hart Voting System Train-the-Trainer Training Manual* supports all Hart Voting System products, not all of the procedures in this document apply to all implementations. You must identify applicable procedures for the voting devices implemented.

What is Train-the-Trainer?

The Hart Voting System Train-the-Trainer course teaches local jurisdiction instructors how to train poll workers on the Hart polling place equipment used by that jurisdiction.

This Document

This document is both a training manual and a guide to assist local jurisdiction personnel training functions. This document is intended for use during initial training with Hart InterCivic training specialists and as a reference guide once initial training is completed.

- All steps that refer to a window, field, button, menu or menu item on the display have the reference in bold (e.g., **Save**, **Close**, **OK**), unless referring to a table or list.
- All steps that refer to a key on the keyboard have the key underlined (e.g., Ctrl, Shift, Enter).
- The word “click” refers to a left click with the mouse unless otherwise stated.
- All report titles are referred to in quotation marks, (e.g., “Ballot Content Proof”), unless referring to a table or list.

See: Refers to a cross-reference for more information regarding the topic.

Note: Refers to a suggestion.

Tip(s): Refers to an advanced user tip.



Refers to a warning or caution.

See:

“Appendix A: Glossary” on page 15 for a complete reference to Hart Voting System terminology.

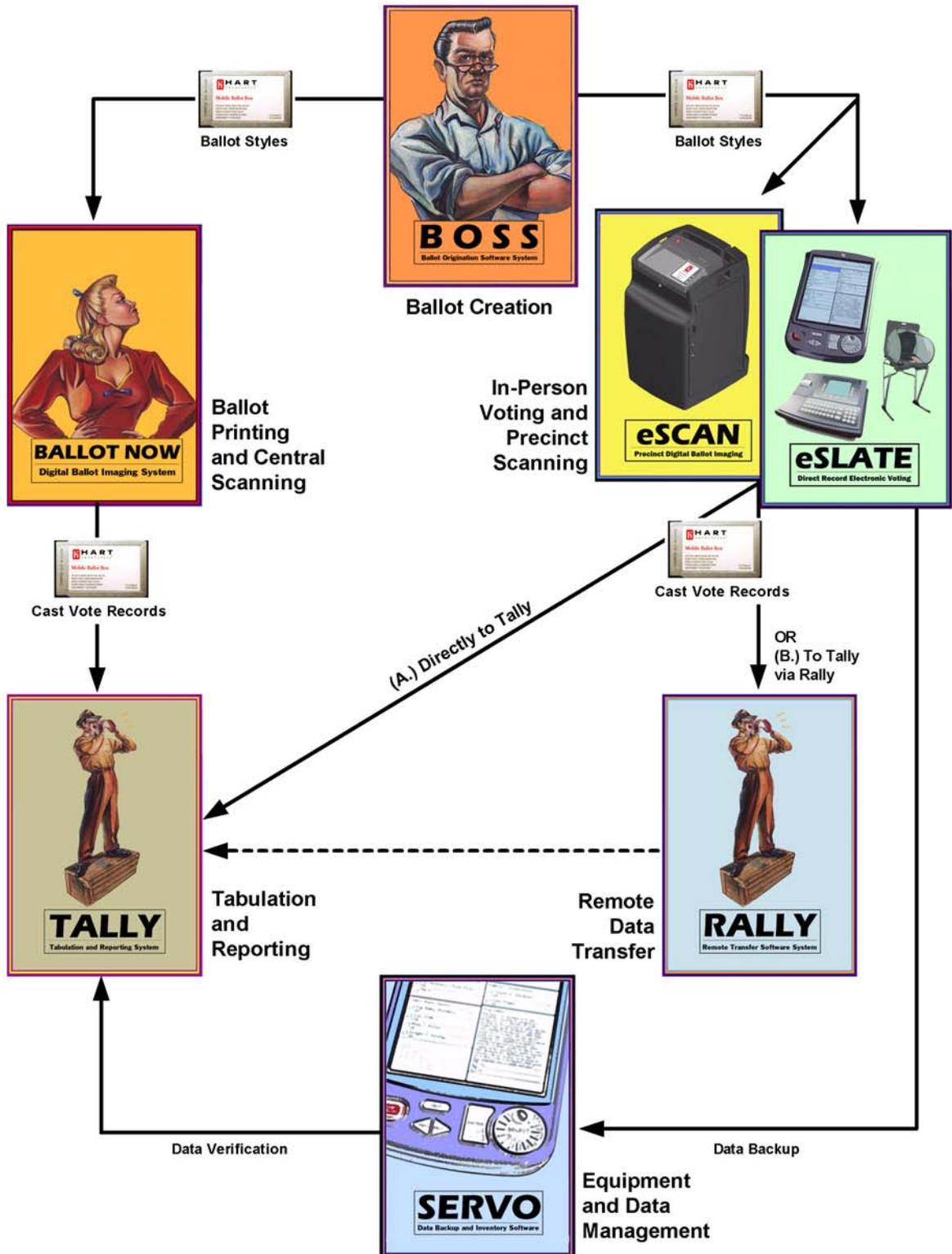
Objectives

The purpose of Hart InterCivic's Train-the-Trainer course is to demonstrate how to successfully plan and perform polling place course training events appropriate to the jurisdiction.

In the course associated with this document, you will:

- Acquire knowledge of the Hart Voting System
- Create a training climate that encourages questions and participation
- Use training time wisely
- Treat trainees with respect
- Thoroughly cover all objectives in the courses taught
- Coach trainees
- Use testing and evaluation feedback procedures to assess effectiveness of training and to modify methodology, personal approach, materials, etc.
- Remain aware of recommended training techniques and expectations
- Determine how, when, and where client training will be conducted
- Adjust training to meet the learners' needs
- Achieve learner mastery of the concepts taught
- Receive feedback on trainer performance
- Conduct training

Hart Voting System Data Flowchart



Hart Voting System Course Descriptions

Standard Courses

At least one of the following courses will be implemented in each jurisdiction, in accordance with the jurisdiction's contract, training planner, and implementation type:

Train-the-Trainer: Hart InterCivic offers Train-the-Trainer courses for the Polling Place Operations courses. This course is designed to teach local instructors Hart Voting System training skills and content. Optional train-the-trainer sessions are available for the Assisting Persons with Disabilities and polling place equipment Troubleshooting courses (additional fees apply).

The eSlate Polling Place Operations Course: In this course, elections officials, office staff, lead election poll workers, and alternate lead poll workers (at least two poll workers per polling place) receive training to set up the JBC and eSlate, open the polls, run the system in a secure setting, identify when voters may need assistance, close (and/or suspend) polls, power down the system, handle sensitive Mobile Ballot Boxes (MBBs) appropriately, and pack the equipment. This course includes instructions on curbside voting, using the Verifiable Ballot Option (VBO), and handling provisional voters. It also includes a module simulating the polling place experience. Finally, this course includes a reference guide for each election poll worker who is operating the Judge's Booth Controller.

The Poll Worker's eSlate Operations Course: In this optional short course (refer to contract), elections officials, office staff, and non-lead poll workers receive training in the specifics of operating the eSlate and the Disabled Access Unit (DAU eSlate). Trainees also learn how to educate and assist voters using the eSlate and Disabled Access Unit. Training includes the basic operations of the eSlate and DAU eSlate, and answering questions that voters may have about special features, such as write-in voting, moving through pages of the ballot with the PREV and NEXT buttons, using the summary page to change a vote, using the Verifiable Ballot Option (VBO), intentionally undervoting, and using the headphones and various input devices on the DAU eSlate. This course includes a reference guide for poll workers.

The eScan Operations Course: In this course, elections officials, office staff, lead election poll workers, and alternate lead poll workers (at least two poll workers per polling place) receive training to set up the eScan, open the polls, run the system in a secure setting, identify when voters may need assistance, close (and/or suspend) polls, power down the system, handle sensitive Mobile Ballot Boxes (MBBs) appropriately, and pack the equipment. This course also includes a section on troubleshooting. Finally, this course includes a reference for each election poll worker who is operating the eScan.

The Hart Voting System Polling Place Operations Course: In this course, elections officials, office staff, lead election poll workers, and alternate lead poll workers (at least two poll workers per polling place) receive training to set up the full system - eScan, JBC and eSlate. The course includes training users how to open the polls, run the system in a secure setting, identify when voters may need assistance, close (and/or suspend) polls, power down the system, combine results on the eScan, handle sensitive Mobile Ballot Boxes (MBBs) appropriately, and pack the equipment. This course includes instructions on curbside voting, using the Verifiable Ballot Option (VBO), and handling provisional voters. It also includes a module simulating the polling place experience. Finally, this course includes a reference for each election poll worker who is operating the polling place system.

The Hart Voting System Poll Worker's Guide to Assisting Voters Course: In this optional short course (refer to contract), elections officials, office staff, and non-lead poll workers receive training in the specifics of operating the eScan and the Disabled Access Unit (DAU eSlate) voter's perspective. Trainees learn how to educate and assist voters using the eScan and Disabled Access Unit. Training includes the basic operations of the eScan and DAU eSlate, and answering questions that voters may have about special features, such as write-in voting, undervoting, using the Verifiable Ballot Option (VBO), and using the headphones and various input devices on the DAU eSlate. This course includes a reference guide for poll workers.

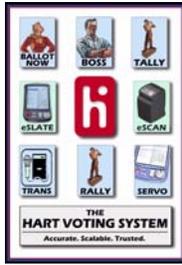
Optional Courses

The following courses are optional, with additional fees for implementing these courses applying. The agendas for these courses are *NOT* included in this train-the-trainer document.

Assisting Persons with Disabilities: Hart InterCivic offers an optional, small group, course designed to educate at least one person per polling place in the etiquette, skills, and sensitivity appropriate to assisting voters with disabilities. This course includes hands-on experience with adaptive devices and the DAU eSlate. It also includes role playing situations. Finally, this course includes a reference for each participant.

The eSlate Support Procedures Course, Troubleshooting Module: This is primarily a warehouse-related tasks course. The polling place equipment Troubleshooting module of this course is available as a separate, and optional, course for election event technical support personnel. Additionally, the Help Desk module is available as a separate, and optional (additional fees apply), course for election event help desk operators.

Notes:



Chapter 2

Training Theory and Practice

Foundational Training Theories

As a Hart Voting System instructor, you are responsible for your students' learning. Here are some learning principles, theories and procedures to apply as you plan and teach. Hart training has been designed around the following guiding principles:

Five Principles of Human Learning

1. A learning experience should be goal-directed.
2. People learn what they practice.
3. Every further step in improvement must be built on the foundation of the previous step.
4. Learners must start by making a personal connection with something they already know.
5. The activity and inter-activity must be as high as possible.

Ten Concepts to Remember When Working With Adult Learners

1. Adult learners must be motivated to learn by enhancing reasons for being in the course and decreasing barriers.
2. Adult learners need reinforcement and will not tolerate slights to their self-esteem.
3. Adult learners must retain information in order to benefit from instruction, and this is accomplished via reinforced practice.
4. Adult learners must be able to transfer new learning to the situation intended. This is accomplished through associating learning with past experience, including a high degree of original learning, and making job benefits obvious.
5. Adult learners willingly engage in learning that helps them cope with life changes.
6. Adult learners require clear expectations from the instructor.
7. Adult learners demand comfort and require breaks.
8. Adult learners need to know that they can be successful at a new task.
9. Adult learners may be impatient, leading them to rush into using new skills or knowledge.
10. Adult learners are experienced learners, and they can be quick to evaluate and appraise good teaching.

Gagne's Instructional Theory¹

Gagne's instructional theory outlines nine instructional events and corresponding cognitive processes. The inclusion of these events in training helps trainees to incorporate and apply new learning.

1. Gaining attention (reception – Hart Voting System trainers do this in the introduction with media and personal energy)
2. Informing learners of the objective (expectancy – Hart Voting System trainers make certain that this is clear during the introduction)
3. Stimulating recall of prior learning (retrieval – Hart Voting System trainers ask questions that relate to previous elections experiences)
4. Presenting the stimulus (selective perception – Hart Voting System trainers are presenting a fantastic stimulus... the Hart Voting System)
5. Providing learning guidance (semantic encoding – Hart Voting System trainers monitor and coach trainees)
6. Eliciting performance (responding – Hart Voting System trainers encourage correct use of procedures and steps)
7. Providing feedback (reinforcement – Hart Voting System trainers tell trainees when they are doing a great job, and Hart Voting System trainers correct mistakes trainees may make)
8. Assessing performance (retrieval – Hart Voting System trainers actively monitor simulation exercises)
9. Enhancing retention and transfer (generalization – Hart Voting System trainers ask follow-up questions)

These events should satisfy or provide the necessary conditions for learning and serve as the basis for designing instruction and selecting appropriate media.

The Six Stages of Learning

1. Not knowing how to do it or how it works, just trying - novice
2. Practice, practice, practice – advanced beginner
3. More practice, getting a feel for it – experienced (intermediate)
4. More practice, displaying substantial understanding, skill and confidence – competent
5. Comfortable, showing creativity, feeling natural and satisfied – proficient
6. Teaching it, building on it – a master user (expert)

A Hart Voting System instructor's goal is to assist trainees in acquiring the skills and knowledge to reach at least stage four, and preferably stage five or six, in this hierarchy.

1. Gagne, R., Briggs, L. & Wager, W. (1992). Principles of Instructional Design (4th Ed.). Fort Worth, TX: HBJ College Publishers, <http://tip.psychology.org/gagne.html>

Training Methodology

Hart training methods are instructional practices put in place to implement the theories presented in practical and productive manners.

The Hart Five-Step Teaching Method

1. **Tell** – Explain the objectives and benefits of the system for each course. Use proper terminology. Tell trainees why they are doing things—how will it help them in their job and/or make the job easier. If trainees have not had any experience with the system, it is best if you can start each session off with a hands-on system demonstration. The trainees use the devices as if they are voters.
2. **Show** – Use the LCD projector and PowerPoint and video presentations for the Hart courses to demonstrate each module's teaching points for the trainees. Walk through each lesson and each module. Give trainees reference page numbers and give time for note taking when possible.
3. **Encourage hands-on learning** – Trainees must complete the exercises in their manuals.
4. **Review what you have just gone over** – Go back over the objectives and review the process in quick steps. Allow time for trainees to review and process information.
5. **Elicit questions** – End each module with a quick verbal quiz about what you have just covered, then allow trainees time for questions. Hold questions that are not applicable at the time, and answer those at the appropriate time or at the end of the day. End each course with the self-check list, which will spur questions and items for further review.

Ten Basic Hart Voting System Training Rules

1. Use the training documents to direct learners' attention. Encourage note-taking in the training documents.
2. Tell objectives, show steps, and give opportunities for hands-on learning.
3. Encourage trainees to ask questions.
4. Dress professionally. Dress at least business-casual, or as formally as your clients.
5. Start on time.
6. End on time, but do not use an early release as an incentive.
7. Remain flexible and professional.
8. Tailor the presentation to take advantage of your strengths as a trainer, and to your audiences' needs.
9. Ask trainees to set phones and pagers on vibrate mode, and ask them to take calls outside the classroom. Do *not* allow cell phone conversations in the classroom.
10. Use your laser pointer to point out equipment keys, equipment screen items, and slideshow details. Avoid taking over the use of equipment from a trainee.

Course Presentation Methods

These are the recommended methods for teaching the poll worker courses included in the Hart Training Program. These methods have proven successful. The course instructor's main resources for providing structure and organization to the training event are:

- PowerPoint slideshow and videos
- The course Desk Reference
- The course agenda

See:

See "Appendix B: Poll Worker Course Agendas" on page 25.

Elements to take into consideration when planning course methodology are as follows.

The Audience

The four-hour courses, "eSlate Polling Place Operations Course", "eScan Polling Place Operations Course", and "Hart Voting System Polling Place Operations Course", are the core polling place system courses for poll worker training. Trainees are lead poll workers who will either be directly operating the devices during an election event or directing others on how to do so. Key points to stress include using the procedures in the system Desk Reference as a checklist. As an instructor, it is important that you are specific about the page number(s) you are referencing as you teach each module/exercise. During lab exercises, have trainees use the Desk Reference as a guide. (One technique is to assign a lead role to one trainee per lab station, per exercise. Have this role rotate for the next exercise.)

Trainees for the short courses, "Poll Worker's eSlate Operations Course" and "Hart Voting System Poll Worker's Guide to Assisting Voters Course", may be all poll workers, or all non-lead poll workers. The goals of these courses are to get poll workers comfortable with the polling place hardware itself and to teach poll workers how to assist voters using the voting devices.

Trainees for the optional "Hart Voting System Poll Worker's Guide to Assisting Voters Course" may be lead poll workers or a select set of all poll workers. This course is intended to provide poll workers with the knowledge, awareness and sensitivity needed to assist persons with disabilities using the eSlate Disabled Access Unit (DAU). This treatment can be summarized with the words "Putting People First" (i.e., the person before the disability). This course will also increase poll workers' knowledge of, and confidence in, the DAU accessories and other accessibility features of the eSlate system. This course is intended for small audiences.

The "Hart Voting System Device Troubleshooting Course" is intended for warehouse personnel, field technicians, and help desk operators. After completing this course trainees will have background information on how to set up the polling place components. Trainees will run the polling place devices, including opening and closing the polls. Trainees will have background information on how to pack up the equipment. Trainees' main focus is on troubleshooting equipment-related and human error situations with the polling place equipment used in the local jurisdiction.

Setting the Stage

Start each training session by introducing yourself and giving some product overview. You may use a "Welcome to ..." or "How to Vote" PowerPoint slideshow or a video. Introduce yourself, set the expectations and objectives for the course, preview the schedule, including the break, and orient trainees to the facility. Make certain that all trainees have signed in, and verify that each trainee has a Desk Reference appropriate for the course.

Slideshow and Video Presentations

Each course has a PowerPoint slideshow that accompanies and supports the training. The slideshow is consistent with the agenda and the desk reference for that course. The intent of the slideshow is to provide visual learners with a means to learn, it is *NOT* to provide instructors with a script. The agenda provides instructors with a “lesson plan”, the desk reference provides the script, or the details, the slideshow provides visual cues. Also, videos are available to reinforce learning hardware set up and other procedures. Videos are useful as a means to integrate yet another form of visual learning into the courses. Videos can also save time in presenting courses, and they can provide consistency between presenters.

Hands-on Exercises

Following the course agenda, teach with the course’s PowerPoint slideshow as a reference for those learners who learn best using visual cues. The slideshow also provides some structure for the course (reference points for exercises, stopping points, etc.). After teaching in large-group format from the slideshow, refer the trainees to the specific pages in the course Desk Reference for the module addressed, and send trainees to lab stations for hands-on work. Conduct the hands-on exercises as indicated in the course agenda.

It is important that trainees at lab stations are:

- Given direction before sending them to the lab stations
- Given clear expectations for outcomes
- Set up in small groups
- Sent to the same lab station with the same group for each module
- Monitored by the instructor
- Reminded to use specific pages of the Desk Reference as a guide for the exercise at hand
- Told what to do upon completion of the exercise.

Simulation Modules

If the course agenda calls for a simulation exercise, this module is taught after a short break for the trainees. During the break, the instructor(s) must reset the equipment and prepare it for the simulation exercise.

Packing Equipment

A reality of training in an equipment-related course is that the equipment has to be ready for the next session (or the warehouse) upon completion of a class. Equipment should not be packed until it is reset and prepared for the next class. Course agendas provide review activities for trainees while the instructor(s) reset the equipment for the next session. In some cases, the review activity is an exam or a “written review” for trainees. After equipment is reset, trainees should pack equipment so that it is in the same location, in the same condition, that it was in at the beginning of the course.

Review

If a self-assessment “Checkpoint” instrument is used, be certain that there is ample time allowed for administering this review instrument. While trainees are completing the review, the instructor(s) should be resetting the equipment for the next session. Review instruments should be checked with trainees, if time permits. Review instruments may be collected from each trainee in order to document scores and identify polling locations that may need further training and/or assistance during the election event.

Closing

Review procedures and “Parking Lot” questions (questions that have been put on hold during the session). Check assessment instruments, if implemented, with a PowerPoint slide and limited discussion. Hand out course evaluation forms to at least three trainees per class. The course evaluation form provides trainees with an opportunity to rate the session and the instructor. Collect evaluation forms and bid trainees a successful election event.

Planning Overview

Constraints and Contributors to the Ideal Training Environment

Consider all possible constraints and contributors... space, time, trainees, equipment, and documentation.

Space

Review the course agenda specific to the course being taught. Each agenda includes an equipment list and a classroom layout graphic. Plan for enough space for a group instruction area, lab stations, and equipment movement.

Time

Your schedule will be full. Be efficient with your time, especially time spent moving trainees in and out of the classroom. Be specific about breaks, and start on time after a break. When taking a break, state not only the length of the break, but the return time. Do not wait for all trainees to return, if they are running late. Time management will be a huge issue if you are in a situation where you are training for a large jurisdiction. You may need to change timeframes in order to move more slowly through a module, or more quickly. Timing notes are included in course agendas.

Trainees

Make certain that the people who are in the class are, according to the On-Site Project Administrator, those that need to be assigned to that course. Use a sign-in sheet to keep track of trainees. Compare the sign-in sheet to the roster, if a roster is available. Retain the sign-in sheet for record keeping.

Equipment

The hardware used to train each customer will be the equipment that the customer has purchased. You must conduct training so that trainees have hands-on experience with polling place components. This requires enough equipment so that there is a low student-equipment ratio. A suggested list of equipment and trainee/equipment ratios is included with each specific course agenda.

Documentation

The standard training document used is a Desk Reference. This Desk Reference is a tool for both training and operations in the polling place. A stock desk reference will be used when possible. Other documentation affecting training includes the poll book, provisional paperwork, and reconciliation logs. A suggested list of documentation is included with each specific course agenda. Consult your Hart InterCivic customer contract to identify documentation that is included with equipment purchase.

Resetting Equipment

SERVO Equipment Reset Procedure

Each of the Hart Voting System polling place equipment courses includes hands-on exercises. Some courses include both guided exercises and a simulation exercise where trainees practice equipment procedures independently. Training equipment and MBBs must be reset, or “zeroed”, after polls are suspended or closed, before Zero Reports can be printed and polls opened again. Course agendas indicate when and how to reset for each specific course. In general, a trainee break is built into the course in order to allow time for the instructor to reset equipment.

When to Reset

Reset equipment:

- After guided practice modules that are followed by a simulation exercise
- Before packing equipment, so that it is ready for the next session (or for warehousing).

How to Reset

In order to reset equipment, the instructor will need access to Hart InterCivic’s SERVO application. The instructor will need to be included as a SERVO application user with **Admin Tools** permissions. The instructor will also need cables for connecting the SERVO computer to the polling place equipment: a network crossover cable for the eScan and a parallel cable for the eSlate system. These cables are included with the SERVO computer, which is usually a laptop.

1. Leave the voting equipment MBB in the device (it will be reset to zero cast vote records, making it reusable for another training event), and power on the device.
 - > Audio Cards do not need to be removed from DAU eSlates in order to reset.
2. If using the eSlate system, up to 12 eSlates (booths) may be connected to the JBC in a daisy chain.
3. Select the SERVO shortcut on the PC desktop and log in to the SERVO application.
4. Go to the SERVO **Admin Tools** menu and click **Device Reset**.
5. In the **Device Reset** window, select the radio button for the device type.
6. Connect the cable from the SERVO PC to the JBC or eScan.
7. Connect to the JBC “printer” port *OR* connect to the eScan network port.
8. Wait for the **Device Reset** window to confirm that the device has been reset (lower left corner of the window).
9. Each device screen will display a message confirming that the reset is complete.
10. After resetting all equipment, proceed to predefine equipment, etc. for the next training session, if applicable.



Notes:

Appendix A: Glossary

Term:	Definition:
Abandoned Ballot	A ballot that the voter did not cast into the ballot box before leaving the polling place. On an eSlate, this is a ballot that the voter did not cast by pressing the CAST BALLOT button and the voter is not present. Local election rules dictate dispensation of an abandoned ballot.
Absentee Ballot	An official ballot issued to a voter who will be "absent" from the polling place on Election Day.
Absentee Voting	A voting method by which people can cast their ballots without going to the polling place on Election Day. Early Voting is sometimes referred to as "Absentee-in-person," and by-mail voting is sometimes referred to as "Absentee-by-mail."
Access Code	The four-digit number given to each voter that indicates to the eSlate system which precinct and ballot style to display to the voter on the eSlate voting unit. The Access Code is printed on a slip of paper printed on the JBC.
Access Code Status Report	A JBC report that is printed on-demand. It lists the number of Access Codes issued, voted, expired, canceled, and active.
Access Code Summary	A JBC report that is printed with the "Tally" report when polls are closed on Election Day. It lists the number of Access Codes issued, voted, expired, and canceled.
Americans with Disabilities Act (ADA)	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.
ATA	Advanced Technology Attachment; a disk drive implementation that integrates the controller on the disk drive itself.
Audio Card	Used in a DAU eSlate, the PC card that contains the audio prompt recordings for an election. Formerly also called a "DAU Card".
Audit Log, Audit Trail, Audit Report	Recorded information that allows elections officials to view the steps that occurred on the equipment included in an election to verify or reconstruct the steps followed without compromising ballot or voter secrecy.
Authentication	The verification of the identity of a person or process. In a communication system, authentication verifies that messages really come from their stated source, like the signature on a (paper) letter.
Ballot Box, eScan	A secure receptacle for the eScan that collects scanned paper ballots and that has an emergency compartment for temporary storage of voted ballots in case the eScan is disabled.

Term:	Definition:
Ballot Box Security Seal	The seal attached to the MBB door on a JBC or eScan to secure the installed MBB. Also, the seal attached to the lid/receptacle junction of the eScan ballot box.
Ballot Code	A unique number assigned to either a provisional ballot or an Early Voting retrievable ballot to enable swift retrieval of that ballot from the Hart Voting System Tally application by election officials.
Ballot Format	The arrangement of the ballot created in BOSS. Ballots may be formatted for the eSlate or for Ballot Now.
Ballot Instructions	Instructional text that appears at the top of the ballot. There are two separate types of Ballot Instruction text: (1) eSlate and (2) Ballot Now. There is also separate audio instruction associated with the eSlate ballot instruction.
Ballot Key	The unique alphanumeric identifier associated with each VBO cast vote record. This identifier aids in reconciling votes in case of a manual recount.
Ballot Now™	The Hart Voting System software application that prints paper ballots on demand and then digitally images the voted ballots to save for delivery to Tally.
Ballot Now Image Processor	Ballot Now Image Processor (BNIP) is an application that runs in parallel with Ballot Now. After scanning ballots, BNIP processes ballot images.
Ballot Origination Software System™ (BOSS)	The software application used to build an election database and create ballot styles. BOSS is used to write the MBB, Audio, Solo, and Demo cards used in Hart Voting System equipment.
Ballot Style	<p>One of any number of specific ballot configurations issued to the appropriate precinct. At minimum, ballot styles differ from one another in content. They may also differ in size of type, in language used, or in method of presentation (e.g., visual or audio).</p> <p>A ballot with a unique collection of contests to be used in the election. Every precinct's (or split precinct's) ballot is linked to one ballot style and there may be several precincts with the same ballot style. The ballot style information is carried on the MBB. A ballot style barcode is printed on the ballot.</p>
Ballot Text	Instructional text embedded in the ballot. Ballot Text is often used to identify a section of the ballot.
Bar Code	A printed horizontal strip of vertical bars of varying widths, groups of which represent decimal digits. In the Hart Voting System, bar codes are required in order for paper ballots to be correctly scanned. Ballot Now uses bar codes to represent a ballot page's election identifier (ID), party ID, language ID, precinct ID, sheet ID, serial number (if applied), page number, ballot type, and duplex code.
Card Device	The PC-card drive for reading and writing Hart Voting System data and audio cards.
Cast Vote Record (CVR)	An anonymous record of the contest options that a voter selected on his/her cast ballot. In the Hart Voting System, Cast Vote Records are stored in electronic format. One Cast Vote Record is equivalent to one ballot.

Term:	Definition:
Challenged Ballot	Terminology and rules for “challenged ballots” or “challenged voters” vary by state. In general, a challenged ballot results when a voter’s right to cast a ballot in a certain jurisdiction is challenged for various procedural reasons. If the challenge stands, the voter may, in most cases, vote provisionally.
Contest	A choice to be made on the ballot; a race. Contest types include offices, issues, referendums, propositions and questions.
Credentials	Authentication information that enables access to operations in the system or associated databases. Credentials typically include user IDs and passwords.
Cumulative (Access Code) Summary	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.
Cumulative Voting	The votes for each candidate in an office contest are replicated as many times as the number of valid choices.
Cyclic Redundancy Check	A continuous test of each transfer of data within a system to ensure that the data received at the end of the transfer is the same as the data originated by the source.
(Daily) Detail Report	A report that the JBC or eScan prints when the polls at an Early Voting site are suspended. This report identifies the number of ballots cast per precinct.
Daily (Access Code) Summary	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.
Daisy Chain	Items connected in a series. The eSlates are daisy chained, one to another, with one plugging into the JBC.
Damaged Contest	In Ballot Now, a mark requiring resolution because the option box has been erased or partially erased (damaged). A damaged contest may be resolved for voter intent or confirmed. If confirmed, a damaged contest will register as no choice for that selection. This may result in fewer selections than allowed for that contest; i.e., an undervote.
Database	A storage point for information (data).
Demo Card	An ATA memory card that contains both ballot and audio data for use in a Demonstration eSlate.
Demonstration eSlate (Demo)	An eSlate set up for voter education purposes, to allow voters to practice using the eSlate buttons and interface (including headphones and adaptive devices, if desired) on a functioning unit that cannot record votes. A Demonstration eSlate does not require a JBC in order to display ballots because it uses a special ATA memory card that contains both ballot and audio data. Demonstration eSlates are also known as “demo units.”
Digital Signature	An encrypted digital code appended to data, making it possible to require authentication before allowing access to that data.
Direct Record Electronic (DRE)	The election industry term for an electronic machine at which a voter can view, vote, and cast a ballot.

Term:	Definition:
Disabled Access Unit™ (DAU)	An eSlate that includes accessory components so that disabled persons can vote independently and privately. DAU eSlates include a module that accepts audio cards so that voters can listen to the ballot with headphones. DAU eSlates also have jacks for tactile input switches or “sip and puff” devices so that voters with limited mobility have alternatives to the SELECT wheel.
District	A selection of precincts and/or split precincts that determine a voting group.
Duplicate Ballot	During scanning, if serial numbers were printed on ballots, Ballot Now will search the database for an identical ballot serial number every time a ballot is scanned, and disallow the ballot if it is a duplicate.
Duplex	Two-sided. In Ballot Now ballots are printed and scanned on both sides of the ballot sheet. The eScan scans both sides of the ballot sheet.
Early Voting	In the Hart Voting System, the term for votes cast in-person prior to Election Day. Nomenclature for “Early Voting” varies from state to state in the U.S.A. (Absentee In-Person, Absentee Walk-In, etc.). Totals are not available from the polling place during the Early Voting period (i.e., no “Tally” report available).
Early Voting Retrievable Ballot	Ballots cast on the eSlate at Early Voting polling places that can be retrieved by Ballot Code from the Tally tabulation application by election officials. The Ballot Code is printed on the Retrieval Stub for an Early Voting retrievable ballot. A checkbox in BOSS must be selected in order to identify eSlate ballots cast during Early Voting as retrievable.
eCM	eSlate Cryptographic Module; a highly secure peripheral USB device provided by Hart InterCivic. The eCM contains the signing key, the key ID, and the eCM PIN required to perform certain functions in the Hart Voting System applications.
eCM Manager	The Hart InterCivic software application that manages approved security functions for use in the Hart Voting System. eCM Manager is used to create a signing key, and then write the signing key, key ID and eCM PIN to the eSlate Cryptographic Module (eCM).
eCM PIN	eSlate Cryptographic Module Personal Identification Number; a password selected by the jurisdiction system administrator before any signing keys are written. This PIN is used to access functions requiring the eCM.
EDX	Election Definition XML (eXtensible markup language); a format for election information data exchange.
Election Assistance Commission (EAC)	An independent federal commission that serves as a national clearinghouse and resource for the compilation of information and review of procedures with respect to the administration of federal elections.
Election ID	An election identification code that is unique for every election. The election ID is used internally by the software applications.

Term:	Definition:
Election Identification Report	A report that the JBC or eScan 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 for the polling place. For Election Day, shows the name of all precincts enabled for the polling place.
Election Management System (EMS)	A set of processing functions and databases within a Voting System that define, develop and maintain election databases; perform election definition and setup functions; format ballots; count votes; consolidate and report results; and maintain audit trails.
Encryption	Any procedure used in cryptography to convert plaintext into ciphertext (encrypted message) in order to prevent any but the intended recipient from reading that data.
eScan™	Hart InterCivic's precinct paper ballot scanning device. A paper ballot printed from Ballot Now can be scanned and recorded on this device.
eSlate®	Hart InterCivic's direct record electronic (DRE) voting device. An electronic ballot can be viewed, voted, and recorded on this device.
Event	In SERVO, a specific backup of a set of devices in SERVO. An Election MBB is required to create an Event. Each Event relates directly to either an Election or a Test Election.
FEC	Federal Election Commission, an independent federal regulatory agency. Voting systems regulation formerly assigned to this body have been transferred to the Elections Assistance Commission (EAC).
Finalized	In BOSS, the database status that prevents further data modification and writing of MBBs to make it available to Tally. In Tally, the database status that prevents further reading of votes from MBBs into Tally.
FireWire	A personal computer and digital video serial bus interface standard offering high-speed communications and isochronous real-time data services. FireWire (also known as i.Link or IEEE 1394) can be considered a successor technology to the SCSI Parallel Interface. FireWire is capable of transfer speeds of up to 400 megabits per second.
Firmware	Computer programs (software) stored in read-only memory (ROM) devices embedded in the system and not capable of being altered during system operation. For purposes of applying the Standards, firmware is considered a form of software.
Flash Memory	Reprogrammable, read only memory that 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.
Fractional Cumulative Voting	A voter selects at least one candidate in a contest that allows votes for multiple options, but selects fewer than the number of options allowed. The unvoted options that were allowable are distributed equally to the voted options.
Functionality Test	Testing of hardware functionality (e.g., testing to see that an eSlate button responds when pressed).

Term:	Definition:
Fusion™	A supplemental Hart Voting System software application used to integrate data, as from Tally and another voting system, and/or to provide custom reporting.
Hart Voting System	The full suite of Hart InterCivic's election software and hardware products, covering everything from ballot creation to tabulation. Includes: BOSS, Ballot Now, eScan, JBC, eSlate, Rally, Tally, utility products, and SERVO. Previously referred to as the 'eSlate Electronic Voting System.'
Hash	Algorithm that maps a bit string of arbitrary length to a fixed-length bit string. Approved hash functions satisfy the following properties: (a) it is computationally infeasible to find any input that maps to any prespecified output, and (b) it is computationally infeasible to find any two distinct inputs that map to the same output.
HAVA	The Help America Vote Act, signed into law October, 2002. HAVA intends to assist states in the administration of federal elections and establishes "minimum standards for states and units of local governments with the responsibility for the administration of federal elections."
Incomplete Ballot	A multi-sheet ballot being scanned in a scan batch that has its first sheet, but is missing following sheets.
Infusion™	A supplemental Hart Voting System software utility used to extract data, as from another voting system or voter registration system, and/or to provide ballot data formatted for import into BOSS.
Initialized Report	A report printed from the JBC and eScan any time the device is powered on. This report shows a timestamp, firmware version, and diagnostic test result. A self-diagnostic test is run on the system, and the result is indicated as "***PASS***" on the report.
Judge's Booth Controller™ (JBC)	The control unit of the eSlate system, through which a poll worker distributes electronic ballots to the eSlate and DAU eSlate.
Jurisdiction	A precinct or group of precincts managed by a single organization.
Key GUID	Key Globally Unique Identifier. A unique, system-generated value assigned to each signing key in the eCM Manager.
Key ID	A user-selected identification number that prompts the eCM Manager application to generate a new 128-bit encrypted signing key. Allowed values are from 1 to 99.
Locked Ballot	In Ballot Now, a ballot that is currently checked out in the resolve process for editing by a user.
Logic and Accuracy Test (L & A or LAT)	In the context of an election, a test to check the accuracy of a piece of voting equipment. An LAT is accomplished by feeding test ballots for which the results are already known (i.e., a "test deck") through the ballot counting system and comparing the results with the expected results. If an error occurs (i.e., the actual test deck count does not match the expected count), then the problem is investigated and corrected, and the test is repeated.

Term:	Definition:
MBB, Election	An MBB used to collect votes for an election. The Election MBB can only contain information from Election ballots.
MBB, Test	An MBB used for test purposes when validating the eSlate system before an election. The Test MBB can only contain information from Test ballots.
Mobile Ballot Box™ (MBB)	A PC card that holds all of the ballot information for the Hart Voting System. An MBB is placed in the JBC unit, the eScan device, and/or in the Ballot Now computer. Cast Vote Records are also stored on MBBs, which are read into Tally. Audio is not stored on an MBB.
Network Configuration Report	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.
Non-partisan Office	An elected office for which candidates run independent of political party affiliation.
Orphan Ballot	A multi-sheet ballot being scanned in a scan batch that has missing leading sheets.
Overvote	The generally prohibited practice of voting for more than the allotted number of options for a given contest. On the eSlate it is not possible to overvote.
Party	A political party, for example Democratic or Republican.
PC Card	An information storage device that is about the size of a credit card. Similar to a USB memory stick. It is also called a “PCMCIA” card. In the Hart Voting System it is called a Mobile Ballot Box (MBB), an audio card, or a demo card.
Persistence	A property of a programming language where created objects and variables continue to exist and retain their values between runs of the program.
Polling Place	The area within the polling location where voters cast ballots. Often a single polling place supports several precincts.
Polls Closed Report	Report printed by the JBC, VBO and/or eScan when the polls are closed. This report includes a timestamp indicating the date and time printed.
Polls Open Report	Report printed by the JBC, VBO and/or eScan when the polls are opened. This report includes a timestamp indicating the date and time printed.
Poll Worker Button	A button, located on the back panel of the eScan device, used to access poll worker and administrator functions.
Precinct	A jurisdiction subdivision for election purposes.
Precinct Voting System (PVS)	A legacy term for those components of the Hart Voting System that are used for election activities at individual polling places.
Provisional Ballot	A ballot provided to individuals who claim they are eligible to vote but whose eligibility cannot be confirmed when they present themselves to vote. Once voted, such ballots are not included in the tabulation until after the voter’s eligibility is confirmed.

Term:	Definition:
Provisional Ballot Stub	A report that prints below the Access Code when a provisional ballot is requested during the “Add Voter” procedure on the JBC. This stub includes the Ballot Code used for ballot retrieval during the tabulation process. The stub must be separated from the Access Code and kept for ballot tracking purposes for this unique type of ballot.
Provisional Parsing	The process of selectively reporting on a provisional ballot only those contests in which a provisional voter is eligible to vote, based on his/her precinct of residence. Provisional parsing becomes necessary when the provisional voter has cast a ballot outside of his/her correct precinct, and the voted ballot style includes contests for which the voter is not eligible to vote. When the Tally software application is installed, users have the option to enable a provisional parsing interface. If enabled, once the Tally application has selectively identified (i.e., “parsed”) those contests on a provisional ballot for which voted options shall be reported, election officials can choose <i>how</i> to report results: cast votes may be associated with the original precinct in which the provisional ballot was actually cast, or they may be reassigned to the voter’s correct precinct.
Provisional Voter	A voter whose eligibility is yet to be determined at a given polling place. A provisional voter is allowed to vote on a “provisional ballot” under conditions set by state election law. Because the voter is “provisional”, his/her ballot must be retrievable by election officials under certain conditions that vary from state to state.
PUB (Public) Count	Also called the “ballot counter”. A six-digit number, shown on the JBC and eScan configuration reports and Polls Open screen, and in the Ballot Now window, that indicates how many votes have been counted, and CVRs recorded, on that machine for the current election. The public count of a device is reset to “zero” during warehouse operations between elections.
PVT (Private) Count	A six-digit number, shown on the JBC and eScan configuration reports and Polls Open screen, and in the Ballot Now window, that indicates how many ballots have been cast on that machine in its lifetime. CVRs are not associated with the private counter. The private counter cannot be zeroed.
Rally™	The Hart Voting System application that reads, stores, and transfers CVRs via local area network or modem connection to a PC running the Tally application.
Replacement Ballot	A ballot that is designated by the election authority to be a replacement for a spoiled ballot.
Resolution	The Ballot Now task of assigning the voter’s intent to votes on ballots that contain an undervoted contest, an overvoted contest, or a contest with a selected write-in. Resolution may also exclude a completely blank ballot or a damaged ballot.
Sample Ballot	A ballot printed as a sample of the real election ballot. Sample ballots contain a special barcode which prevents them from being included as a CVR in an MBB.
Scan Batch	A group of ballot sheets to be scanned. Each scan batch has certain number of sheets. Ballot Now assigns and prints a sequence number when the ballots are printed. The user can assign comments to a scan batch in the Scan Ballots window prior to scanning the batch of ballots.

Term:	Definition:
Select Wheel	The rotary wheel on the eSlate and DAU eSlate that allows a voter to navigate the ballot and highlight choices by turning the wheel.
Serial Number	A barcode and/or human-readable number placed on the ballot stub and/or the sheets of a ballot that uniquely identifies the ballot in order to prevent duplicate scanning of paper ballots.
SERVO™	The eSlate application used as a System for Election Record Verification and Operations. This application is used for polling place equipment cast vote record backup, recovery, recount, and resetting.
Sheet	In reference to Ballot Now paper ballots, one piece of paper printed on both sides, i.e., duplex. Ballot Now ballots can consist of no more than 9 sheets.
Signing Key	A true 128-bit random number used to cryptographically protect data, making it possible to require authentication before allowing access to the data. In the Hart Voting System, the signing key is written to the eCM, JBCs, eScans, and MBBs.
Sip-and-Puff	A voter's personal input device that connects to the DAU eSlate in the disabled access jack. This enables disabled voters with extremely limited mobility to vote with a mouth-controlled device.
Split Precinct	The smallest division of a precinct for election purposes.
Spoiled Ballot	A ballot that has been rendered invalid by a voter who is still present at the polling place, making it necessary to give the voter a new ballot. With the eSlate, a ballot is spoiled if the voter gets the wrong ballot style, the wrong language, or is not on the DAU eSlate but needs to be.
SSL	Secure Sockets Layer; a protocol developed by Netscape for transmitting private documents via the Internet. SSL works by using a private key to encrypt data that is transferred over the SSL connection.
Straight Party Voting	A voting method that presents a contest that allows selection of a single political party in order to automatically select candidates of that party in contests that allow straight party voting.
Suspend Report	A JBC or eScan report that automatically prints when polls are suspended in Early Voting. For the JBC, 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, as well as a timestamp.
Tactile Input Switches	Also called "dual mode switches," "jelly switches," or "buddy buttons," these red and green "paddles" enable voters with disabilities to vote without using the SELECT wheel and ENTER button on the eSlate. Voters without fine motor control may use these. The red tactile input switch allows voters to navigate through the ballot, similar to turning the SELECT wheel in a clockwise direction. The green switch is similar to pressing the ENTER button.
Tally™	The Hart Voting System tabulation software. After an election, the Tally software counts the votes on the MBB(s) and produces reports on those cast votes.

Term:	Definition:
Tally Report Tape	An Election Day report that may be printed on a JBC or eScan after polls are closed. It includes the date, time, precinct, a tally of votes for each contest, and an Access Code or ballot summary. BOSS includes a setting for allowing, or disallowing, this report to be printed from the JBC or eScan after close of polls on Election Day.
TRANS	Translation, Recording, and Audio Normalization System; an eSlate application for translating multi-language ballot text and for recording all audio (including English) to be imported into the BOSS database.
Undervote	The practice of voting for less than the total number of election contests listed on the ballot, or of voting for less than the number of options allotted for a given contest.
UPS	Uninterruptible Power Supply.
USB	Universal Serial Bus; an external peripheral interface standard for communication between a computer and other devices. In the Hart Voting System, an eCM connects to a USB port.
VBO	Verifiable Ballot Option; the Hart Voting System VVPAT (Voter-Verified Paper Audit Trail) device that can be connected to the eSlate or Demonstration eSlate inside the voting booth in order to print a paper record of each ballot cast.
Voter Registration Computer	An electronic poll book sometimes known as a “thin client” or “VR Computer.”
VVPAT	Voter-Verified Paper Audit Trail; Implemented in the Hart Voting System by the VBO (Verifiable Ballot Option) device.
WAV file	A file format (.wav) used for storing digital audio. TRANS audio is stored in .wav file format.
Write-in	A name of a candidate entered by the voter in order to vote for a candidate that is not listed on the ballot.
Write-in, certified	A candidate that has been certified by the election authority as being a valid write-in candidate for the election.
Write-in Voting	A means to cast a vote for an individual not listed on the ballot.
XLIFF	XML Localization Interchange File Format. A file type (.xlf) used by BOSS and TRANS for language text translation.
XML	eXtensible Markup Language. A structured, extensible, text-based data definition and data exchange format. TRANS uses an .xml file as a manifest, or index, to associated audio .wav files.
Zero Tape Report	A JBC or eScan report that prints out when polls are opened on the first day of Early Voting and on Election Day. This report lists the timestamp, the number of precincts at the polling place, the contests and candidates on the ballot, and verifies that the number of votes for each candidate or option is zero.

Appendix B: Poll Worker Course Agendas

This appendix includes agendas for the following courses:

- Poll Worker's eSlate Operations
- eSlate Polling Place Operations
- Hart Voting System Device Troubleshooting
- eScan Polling Place Operations (with Absentee Operations section)
- Hart Voting System Polling Place Operations (with Absentee Operations section)
- Hart Voting System Poll Worker's Guide to Assisting Voters

How to Use Poll Worker Course Agendas

The agendas, along with the other references in this Train-the-Trainer manual and the course Desk Reference, are “lesson plans” and “teaching guides” for the Hart Voting System polling place equipment courses.

To teach from the course agenda:

- Cross-reference the agenda to the course PowerPoint slideshow and take notes in the margin areas provided.
- Cross-reference the agenda to the course Desk Reference.
- Modify the agenda to meet local needs - this may include deleting topics or exercises.
- Read through the agenda and make notes.
- Check the equipment list in the agenda, and make certain that you have the necessary materials prepared.
- Compare the classroom layout in the agenda to your classroom space, and make modifications in order to meet student needs and provide for safe and efficient movement.
- Make certain that the jurisdiction is aware of the class size, target audience, and class length.
- Review course evaluations and decide how they will be employed.
- Review review instruments and determine how they will be used.
- Refer to the agenda as a “checklist” as you train.

Note:

Course agendas may be customized slightly per implementation. The agendas included here are the “standard” agendas. These agendas also exist as stand-alone documents.

The page numbering for this appendix does NOT follow the numbering for this book. Each agenda has page numbering specific to that agenda.

Notes:

Poll Worker's eSlate[®] Operations Course *Training Agenda*

Estimated Time: 1 hour

Audience: All non-lead poll workers

Objectives: Trainees will become familiar with voting on the eSlate in order to instruct and assist voters.

Benefits of the eSlate: The eSlate is simple to operate. There are on-screen prompts that guide the voter through the voting process. Voters learn the system quickly. There is no way a voter can overvote, and voters are reminded of their undervotes. Voters can see a printout of their selections on the Verifiable Ballot Option (VBO) before they cast their ballot. Voters with disabilities have equal and private access to voting.

Manuals: Poll Worker's eSlate Desk Reference

Other Materials: Poll Worker's eSlate Operations PowerPoint Slideshow, Voter Instructions flyers, Voter Instructions placards, Flag placards, eSlate script, Welcome to eSlate Slideshow or How to Vote video/.mpg, VBO printer paper rolls

Modules: 1-3

Prerequisite: None

Before-Class Responsibilities:

1. **Make certain room is tidy.**
2. **Make certain each lab station has extra JBC and VBO paper.**
3. **Lay out materials (Desk References on chairs, self-assessment "Checkpoint" ready, evaluations ready, sign-in sheet on clipboard...)**



Getting Started/Opening:

1. How to Vote video runs in loop.
2. Trainees seat themselves in classroom area and sign in (pass sign-in sheet around on a clipboard).

Teaching Points:

➤ **Module 1: eSlate Features** (*Timing: 25 minutes. Most should be spent on Exercise 1.1*)

- ▶ Getting Started
 - ▷ Greet trainees, introduce yourself, and outline format, breaks, use of the “parking lot” for questions, training manual overview and
 - ▷ Start the slide show, Hart Voting System overview, benefits to trainees and course objectives
- ▶ How to Vote
 - ▷ Access code
 - ▷ **SELECT** wheel, **ENTER** button, **CAST BALLOT** button
 - ▷ You have finished voting when you see the waving American Flag
- ▶ Other Features
 - ▷ **HELP** button
 - ▷ **PREV** and **NEXT** buttons
 - ▷ Intentionally skipping contests
 - ▷ Intentionally casting a blank ballot
 - ▷ Canceling a choice
 - ▷ Changing a choice
 - ▷ Changing a choice from Ballot Summary
 - ▷ Skipping the final contest
 - ▷ Multi-page Ballot Summary (specific to ballot)
 - ▷ Write-in (specific to ballot)
 - ▷ Straight Party (specific to ballot)
 - ▷ Verifiable Ballot Option (if applicable)
 - **Exercise 1.1:** Vote and cast a ballot on an eSlate. Use the “Other Features for Voters” page of your Desk Reference to try eSlate ballot features. Try the **PREV**, **NEXT**, and **HELP** buttons, cancel a choice, change a choice, try entering a write-in, and skip a contest.

DR page

PPT Slide

- **Module 2: DAU eSlate Features (Demonstration Only)** (*Timing: 10 minutes*)
 - ▶ Disabled Access Unit
 - ▷ Headphones
 - ▷ Tactile input switches
 - ▷ Orientation to the DAU buttons
 - ▷ Sip and Puff input device
 - ▶ Curbside Voting
 - ▷ (Add Voter)
 - ▷ Check for battery power
 - ▷ Enter voter's access code
 - ▷ Disconnect eSlate (booth, if VBO)
 - ▷ Voter votes and casts ballot
 - ▷ Reconnect eSlate to the system and confirm that ballot was cast (reconnect peripherals)
 - No Exercise**

- **Module 3: Voter Instructions** (*Timing: 15 minutes*)
 - ▶ Voter Instructions
 - ▷ Pick up an access code after qualifying
 - ▷ Go to any open booth
 - ▷ Select language, if option available
 - ▷ Enter the access code
 - ▷ Make choices using the **SELECT WHEEL** and the **ENTER** button.
 - ▷ Read the Ballot Summary
 - ▷ Press the **CAST BALLOT** button from the last page of Ballot Summary
 - ▷ If using eSlate with VBO, verify paper ballot and press **CAST BALLOT** until you see the waving American flag
 - ▶ How to Help a Voter
 - Exercise 3.1:** Using a placard, flyer, script, or demonstration unit eSlate, practice giving voter instructions, aloud, with a partner.
 - Exercise 3.2:** Instructor and a volunteer from the audience model assisting a voter who has requested help.

- **Review/Appendices/Assessment** (*Timing: 10 minutes*)
 - ▶ Security, Guide to Serving Voters with Disabilities, FAQ's
 - ▶ Appendices
 - ▶ Q & A.
 - ▷ Hand out self-assessment "Checkpoint", set time allotment, and check when finished (optional).
 - ▷ Hand out evaluation forms (limit number), collect in an envelope (optional).

After-class Responsibilities:

1. **File sign-in sheet in envelope for runner pick-up.**
2. **File evaluations in envelope for Hart training specialist.**
3. **Pick up trash and tidy up room.**
4. **Set out materials for the next class.**
5. **Check paper in JBCs.**
6. **If you are the last class for the day, shut off all equipment.**

Instructors Reset and Predefine equipment, if necessary

System Reset Procedure with SERVO:

In order to reset equipment, the instructor must have Hart InterCivic's SERVO application. The instructor must be a SERVO user with "Admin Reset" permissions. The instructor also needs cables for connecting the SERVO computer to the polling place equipment, a network crossover cable for the eScan, and a parallel cable for the eSlate system. These cables are included with the SERVO computer, which is usually a laptop.

1. Leave the MBB in the device (it will be reset to zero Cast Vote Records, making it reusable for another training event), and power on the device. **Make certain that all voting equipment is powered on. This may take up to 12-15 seconds.**
2. Audio Cards do not need to be removed from DAU eSlates in order to reset.
3. If using the eSlate system, up to 12 eSlates (booths) may be connected to the JBC in a daisy chain.
4. Select the SERVO shortcut on the PC desktop and log in to the SERVO application.
5. Go to the SERVO **Admin Tools** menu and click **Device Reset**.
6. Connect the cable from the SERVO PC to the JBC or eScan.

For JBCs, connect to the printer port. For eScans, connect to the network port. In the **Device Reset** window, select the radio button for the device type. Wait for the **Device Reset** window to confirm that the device has been reset (lower left corner of the window) and listen for the audible "ding."

7. Each device screen will display a message confirming that the reset is complete.
8. After resetting all equipment, proceed to predefine equipment, for the next training session, if applicable.
9. To predefine, duplicate warehouse steps that would be performed prior to sending out JBC and/or eScan equipment. (eSlates are NOT connected to the JBC for this process.) Unplug and restart the eScan or JBC, enter the Start-Up Password, Polling Place I.D. (____), select type of voting, confirm configuration, print Zero Tape, and unplug eScan or JBC.
10. Equipment is ready.

- **Troubleshooting:** Restart voting device, restart SERVO, and check network connections and settings. (PC Network settings must be compatible with eScan; Start/Settings/Network and Dial-up Connections/Local Area Connection/TCP/IP/Properties/Use the following address.) Disable and then enable the network connection. Run ipconfig command prompt. Retry.



Equipment List

	Item	Quantity	Ratio	Notes
Hardware	Power strip(s)/Surge protector(s)			
	Extension Cords			
	Judge's Booth Controller(s)		1:1 PVS daisy chain	Programmed to training eCM
	JBC printer paper rolls		1: class	
	eSlates		1: 1 or 2 trainees	
	DAU(s)		1:1 or 2 trainees	
	eSlate booths			
	eSlate battery packs			
	JBC Battery packs			
	MBB(s) with relevant ballots/Labels			
	DAU cards & Labels			
	Headphones			
	Tactile Input Switches			
	JBC Reset Cable	1		
	SERVO Computer	1		
	Presentation Computer	1		
	Presentation System	1		
	PC speakers			

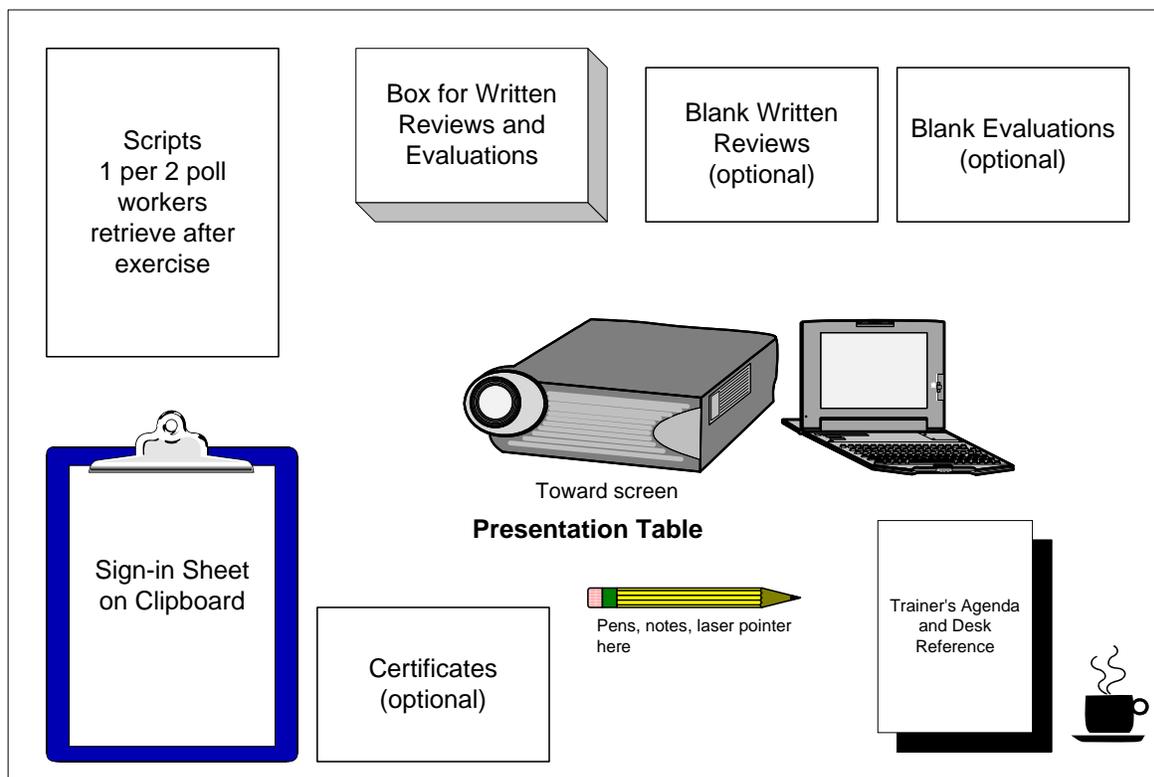
	Item	Quantity	Ratio	Notes
Miscellaneous Supplies	Agenda	1		
	Name Tags			
	Glass cleaner and soft cloth	1		
	Pens		1:1	
	Markers			
	Clipboard(s)	1		
	Screwdriver(s)	1		
	Laser Pointer	1		
	LCD projector	1		
	Presentation Screen	1		
	PowerPoint Slideshow(s)	1		
	How To Vote video/mpeg	1		
	U.S. Flags			
	Tape			
	JBC security seals	1/JBC		
	Polling Place ID list			
	Passwords list			

	Item	Quantity	Ratio	Notes
Documentation	Poll worker's eSlate Operations DR		1/trainee	
	eSlate Script Placard		1:2 trainees	
	Voter Instructions flyers		samples	
	Voter Instructions Placards		1/booth	
	Flag Placard		1/booth	
	Self-assessment "Checkpoint" (optional)		1:1	
	Training Evaluation forms (optional)		3: Class	
	Sign-in Sheet		1: Class	
	Certificates (optional)		1:1	

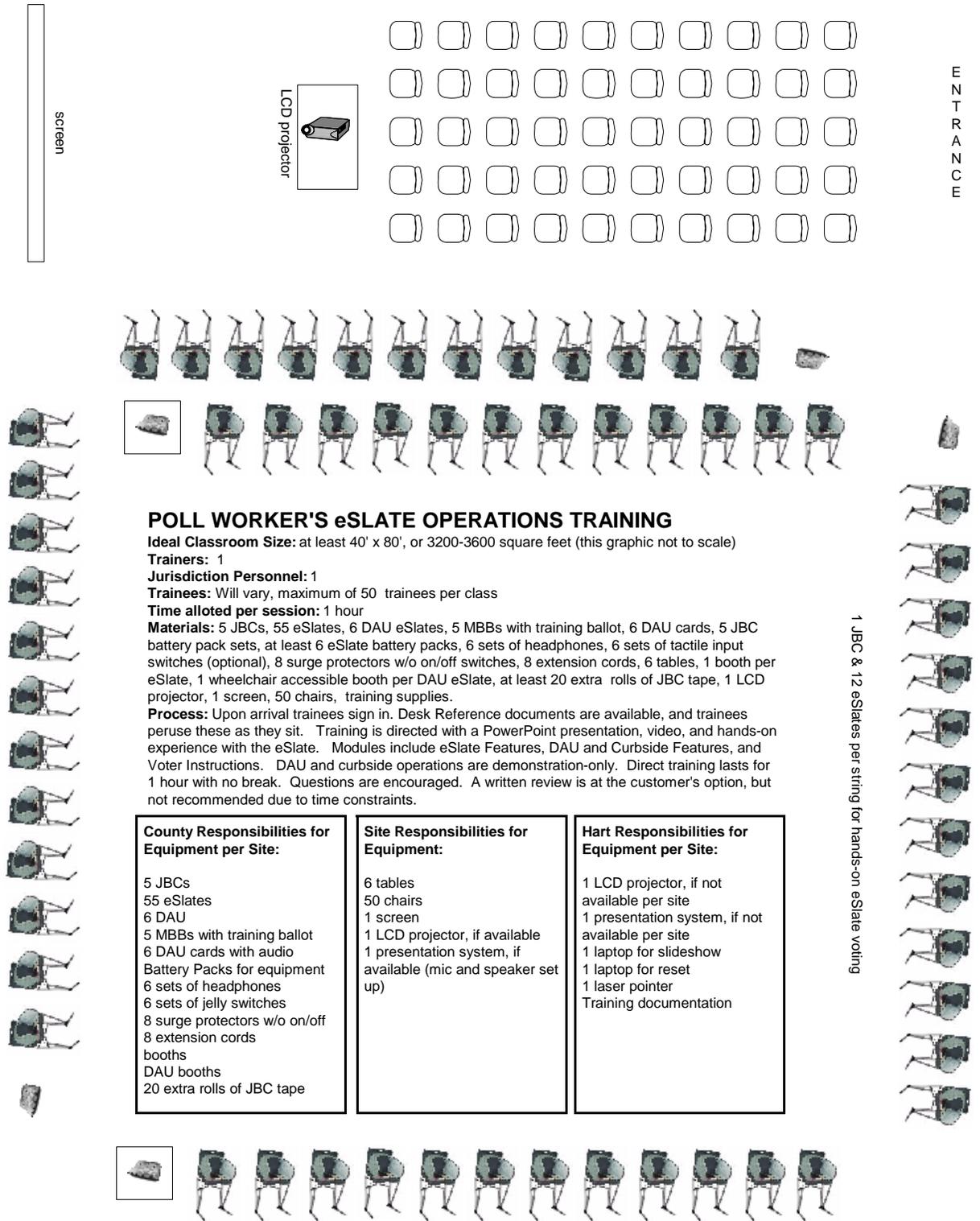
Document Use for eSlate Operations Training

At Central Table	Hand out to Trainees
Sign-in sheet	Poll Worker's eSlate Desk Reference (on chairs)
	eSlate picture w/ script (for exercise, 1 per 2 trainees and retrieve materials)
	Trainee Self-assessment "Checkpoint" (optional)
	Training Evaluation (2-3 per class – optional)

Document Layout at Presentation Table



Physical Classroom Layout



POLL WORKER'S eSLATE OPERATIONS TRAINING

Ideal Classroom Size: at least 40' x 80', or 3200-3600 square feet (this graphic not to scale)

Trainers: 1

Jurisdiction Personnel: 1

Trainees: Will vary, maximum of 50 trainees per class

Time allotted per session: 1 hour

Materials: 5 JBCs, 55 eSlates, 6 DAU eSlates, 5 MBBs with training ballot, 6 DAU cards, 5 JBC battery pack sets, at least 6 eSlate battery packs, 6 sets of headphones, 6 sets of tactile input switches (optional), 8 surge protectors w/o on/off switches, 8 extension cords, 6 tables, 1 booth per eSlate, 1 wheelchair accessible booth per DAU eSlate, at least 20 extra rolls of JBC tape, 1 LCD projector, 1 screen, 50 chairs, training supplies.

Process: Upon arrival trainees sign in. Desk Reference documents are available, and trainees peruse these as they sit. Training is directed with a PowerPoint presentation, video, and hands-on experience with the eSlate. Modules include eSlate Features, DAU and Curbside Features, and Voter Instructions. DAU and curbside operations are demonstration-only. Direct training lasts for 1 hour with no break. Questions are encouraged. A written review is at the customer's option, but not recommended due to time constraints.

County Responsibilities for Equipment per Site:	Site Responsibilities for Equipment:	Hart Responsibilities for Equipment per Site:
5 JBCs 55 eSlates 6 DAU 5 MBBs with training ballot 6 DAU cards with audio Battery Packs for equipment 6 sets of headphones 6 sets of jelly switches 8 surge protectors w/o on/off 8 extension cords booths DAU booths 20 extra rolls of JBC tape	6 tables 50 chairs 1 screen 1 LCD projector, if available 1 presentation system, if available (mic and speaker set up)	1 LCD projector, if not available per site 1 presentation system, if not available per site 1 laptop for slideshow 1 laptop for reset 1 laser pointer Training documentation

eSlate[®] Polling Place Operations Course *Training Agenda*

Estimated Time: 4 hours

Audience: Polling Place Judge's Booth Controller (JBC) Operators (usually lead poll workers and alternate lead poll workers or the equivalent), Elections Officials, BOSS/Tally/Ballot Now Operators (optional)

Objectives: After completing this course, the trainee will successfully instruct voters, set up the eSlate Electronic Voting System polling place components, run the Judge's Booth Controller, assist voters, suspend (and reopen) or close the polls, and pack up the eSlate equipment.

Benefits of the eSlate: The eSlate and JBC are lightweight, simple to operate with on-screen prompts and easy to monitor. With the JBC it is not a difficult task to get the voter's correct ballot style/precinct (or party affiliation, if applicable). Voters quickly learn the system. There is no way a voter can overvote, and voters are reminded of their undervotes. There are no voter intent issues. Voters can see a printout of their selections on the Verifiable Ballot Option (VBO) before they cast their ballot. Voters with disabilities have equal and private access to voting.

Manuals: eSlate Polling Place Operations Desk Reference

Other Materials: eSlate Polling Place System Desk Reference, Voter Instructions flyers and placards, Flag placards, Voter Instructions Script, Reconciliation Log, Mock voter qualification log, Self-assessment "Checkpoint", Training Evaluation form, How to Vote video/.mpg, and PowerPoint slideshow(s), VBO printer paper rolls

Modules: 1-6

Prerequisite: Hands-on demonstration with the eSlate. Trainees will use the system as if they are voters after they enter the classroom (as time allows).

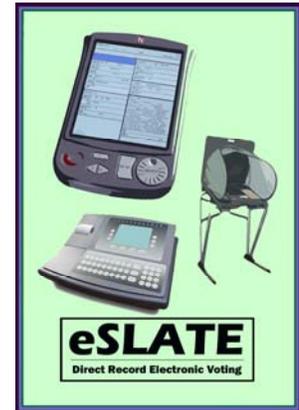
Before-Class Responsibilities:

1. **Make certain room is tidy.**
2. **Make certain each lab station has poll book(s), logs and extra JBC and VBO paper.**
3. **Lay out materials (Desk References on chairs, self-assessment "Checkpoints" ready, evaluations ready, simulation checklist ready, sign-in sheet on clipboard...)**

NOTE: PowerPoint slideshows must be customized regarding Straight Party references, Adding Voters (e.g., precinct IDs), Primary Functionality, Logs, Open and Close Polls steps, and other jurisdictional differences as applicable. The same may be true of Desk References, Self-assessment "Checkpoint" instruments, and Simulation Exercises.

THE TRAINING BALLOT CONTENT AND LANGUAGES SHOULD SIMULATE THE UPCOMING ELECTION.

Refer to the Business Process Analysis and Stock Polling Place Predefine Configuration form before planning any Polling Place Operations presentation.



Getting Started:

1. **Trainees who arrive early enter classroom and vote on the eSlate. Trainer prints Access Codes and gives voter instructions.**
2. **Run “How to Vote” video on LCD projector.**
3. **Trainees seat themselves in classroom area and sign in (pass sign-in sheet around on a clipboard).**
4. **Greet trainees, introduce yourself, and outline format, breaks, use of the “Parking Lot” for questions, and start the slide show or How to Vote video.**

Teaching Points:

DR page

- **Module 1: Voter Instructions** (*Timing: 30 minutes*)
 - ▶ Getting Started: training manual overview, Precinct Voting System overview and security, benefits to trainees and course objectives
 - ▶ Voter Instruction Materials
 - ▷ Flyers
 - ▷ Placards
 - ▷ Script
 - ▷ PowerPoint or Video
 - ▶ Basic Voter Instructions
 - ▷ Pick up an access code after signing in
 - ▷ Go to any open booth
 - ▷ Select language, if option available
 - ▷ Enter the access code
 - ▷ Make choices using the **SELECT** wheel and **ENTER**. You can skip pages with **NEXT**.
 - ▷ Read the Ballot Summary
 - ▷ Press **CAST BALLOT** from the last page of Ballot Summary (Cast Ballot details)
 - ▷ If using eSlate with VBO, verify paper ballot and press **CAST BALLOT** until you see the waving American flag
 - Video Presentation:** How to Vote, eSlate video
 - Demonstration Only:** Instructor gives voter instructions to the group.
Trainees will give each other instructions during module 4.
 - ✓ **Review Question(s): When would you give instructions?**
 - ▶ Other Features
 - ▷ **HELP** button
 - ▷ **PREV** and **NEXT** buttons
 - ▷ Intentionally skipping contests
 - ▷ Intentionally casting a blank ballot
 - ▷ Canceling a choice
 - ▷ Changing a choice
 - ▷ Changing a choice from Ballot Summary
 - ▷ Skipping the final contest
 - ▷ Multi-page Ballot Summary (specific to ballot)
 - ▷ Write-in (specific to ballot)
 - ▷ Straight Party (specific to ballot)
 - ▷ Verifiable Ballot Option (if applicable)
 - Exercise 1.2: No hands-on at this time. Complete this exercise during exercise 4.1 and the simulation in module 6.** Use the “Other Features for Voters” page of your Desk Reference to try eSlate features available in the training (and upcoming election) ballot.

PPT Slide

- **Module 2: Setting Up** (*Timing: 30 minutes*)
 - ▶ Step 1: Checking Supplies
 - ▶ Step 2: Planning the Polling Place Layout
 - ▶ Step 3: Setting up the JBC
 - ▶ Step 4: Setting up the eSlates and DAUs
 - **Video Presentation:** eSlate setup video
 - **Exercise 2.1:** Set up eSlate components, including one JBC, at least one eSlate, and one DAU. Set up the DAU last in the daisy chain. Also, set up the DAU with a battery pack, if available.
 - ✓ **Review Question(s): How do you set up the DAU eSlate?**

- **Module 3: Opening the Polls** (*Timing: 15 minutes*)
 - ▶ Opening for Early Voting (day 1), or Election Day
 - ▷ Connect battery power sources, then AC power supply
 - ▷ JBC self-diagnostic (only if not predefined)
 - ▷ JBC start-up password (only if not predefined)
 - ▷ eSlate button test (only if not predefined)
 - ▷ Polling Place ID (only if not predefined)
 - ▷ Booth Numbers
 - ▷ Printing the Zero Tape Report (Start here if you have predefined the Polling Place ID in the warehouse.)
 - ▷ Opening the Polls – Six-character passwords are mandatory
 - **Exercise 3.1:** Open the polls for an Early Voting session if that is the election type for which you are training. Open the polls for an Election Day session if that is the election type for which you are training. File reports and start the JBC Reconciliation Log.
 - ✓ **Review Question(s): A voter walks into the polling place. Put the steps s/he goes through before getting to the voting booth in order: Listen to Voter Instructions, Qualify, Receive access code, Go to any open booth.**
 - ✓ **Review Question(s): How can you tell that the eSlate is on battery power? JBC?**
 - ✓ **Review Question(s): Where do you put the Open Polls reports? Close/Suspend Polls reports?**

- **Module 4: Working With Voters from the JBC (Timing: 60 minutes)**
NOTE: All exercises in Module 4 include “qualifying” voters in a mock poll book and choosing correct precincts on the JBC.
- ▶ Adding Voters
 - ▷ With a VR interface, if applicable
 - ▷ From the JBC (practice choosing specific precinct(s), if applicable)
 - ▷ For a primary (if applicable, also practice choosing specific party affiliation from the JBC)
 - ▷ From the JBC with the printer disabled (trainer disables)
 - **Exercise 4.1:** Add a voter. Vote and cast a ballot on an eSlate. Use the “Other Features for Votes” page of the Desk Reference as a reference to try eSlate ballot features. Note Access Code on JBC screen AND verify voter’s precinct on access code slip.
 - ✓ **Review Question(s): How do you select the voter’s precinct on the JBC?**
- ▶ How to Help a Voter
 - **Exercise 4.2:** Go to an eSlate. Gain access to a ballot with an active access code. Use the **HELP** button, and note the JBC display. Vote and cast a ballot. Cast a write-in, if available.
 - **Exercise 4.3:** Pair up with another trainee and practice explaining the eSlate voting process to a voter, using the instructional materials.
 - ✓ **Review Question(s): At the polling place, which of the documents will assist voters? Which will assist YOU? What happens when a voter presses help once? Twice?**
- ▶ Adding a Provisional Voter
 - **Exercise 4.4:** Add a Provisional Voter to your voting event, if applicable in your state. Vote and cast a ballot as the Provisional Voter. Note access code and retrieval code on JBC screen.
- ▶ Checking an Access Code
 - **Exercise 4.5:** Use the JBC to “Check Code”. Check code numbers you pick at random, your last assigned access code, and an access code that is still in use.
 - **Exercise 4.6:** Print a new access code, check it, and file it in the appropriate envelope, noting the reason on the access code.
- ▶ Printing an “Access Code Report” (optional per implementation)
 - **Exercise 4.7:** Print an “Access Code Report”.
- ▶ Canceling a booth
 - **Exercise 4.8:** Add a voter, then start voting with that code, but do not cast the ballot. On the JBC, cancel that booth. Record the cancellation in the Canceled Booth Log.
 - ✓ **Review Question(s): At the polling place, which of the aides will help you remember the steps and procedures for running the JBC?**
- ▶ Working with Voters with Disabilities
 - **Exercise 4.9:** Try the DAU headphone feature. Observe the instructor with the DAU unit, using the tactile input switches (optional per implementation).

- ▶ Curbside Voting
 - **Exercise 4.10:** Try the curbside voting feature. Cast a ballot with the eSlate (DAU) unit under battery (DC) power. Before going on to module four, make certain you have cast at least 5 ballots on the eSlate system.
 - ✓ **Review Question(s): What must be done first in order to take the curbside unit out to a voter?**
- **Module 5: Closing the Polls** (*Timing: 15 minutes*)
 - ▶ Suspending the Polls for Early Voting – Six-character passwords are mandatory
 - ▶ Re-opening the Polls for Early Voting – Six-character passwords are mandatory
 - ▶ Closing the Polls for Election Day – Six-character passwords are mandatory
 - ▶ Disconnecting power
 - **Exercise 5.1:** Suspend the polls for Early Voting if you are participating in an Early Voting training event. Print and read the Polls Suspended Report. File reports and complete the JBC Reconciliation Log. Re-open the polls for more Early Voting. Cast two more ballots. Suspend the polls. File reports and complete the JBC Reconciliation Log.
 - **Exercise 5.2:** (OR) Close the polls for Election Day and print and read the JBC Tally Report (and/or “Access Code Report”, depending on implementation), if you are participating in an Election Day training event. File reports and complete the JBC Reconciliation Log.
 - ✓ **Review Question(s): At the end of the day (Election Day or the last day of Early Voting), what items go to the Counting Station?**

**BREAK – 15 minute break while Instructor resets equipment.
Instructors Reset and Predefine equipment here**

System Reset Procedure with SERVO:

In order to reset equipment, the instructor must have Hart InterCivic's SERVO application. The instructor must be a SERVO user with "Admin Reset" permissions. The instructor also needs cables for connecting the SERVO computer to the polling place equipment, a network crossover cable for the eScan, and a parallel cable for the eSlate system. These cables are included with the SERVO computer, which is usually a laptop.

1. Leave the MBB in the device (it will be reset to zero Cast Vote Records, making it reusable for another training event), and power on the device. **Make certain that all voting equipment is powered on. This may take up to 12-15 seconds.**
2. Audio Cards do not need to be removed from DAU eSlates in order to reset.
3. If using the eSlate system, up to 12 eSlates (booths) may be connected to the JBC in a daisy chain.
4. Select the SERVO shortcut on the PC desktop and log in to the SERVO application.
5. Go to the SERVO **Admin Tools** menu and click **Device Reset**.
6. Connect the cable from the SERVO PC to the JBC or eScan.



For JBCs, connect to the printer port. For eScans, connect to the network port. In the **Device Reset** window, select the radio button for the device type. Wait for the **Device Reset** window to confirm that the device has been reset (lower left corner of the window) and listen for the audible "ding."

7. Each device screen will display a message confirming that the reset is complete.
8. After resetting all equipment, proceed to predefine equipment, for the next training session, if applicable.
9. To predefine, duplicate warehouse steps that would be performed prior to sending out JBC and/or eScan equipment. (eSlates are NOT connected to the JBC for this process.) Unplug and restart the eScan or JBC, enter the Start-Up Password, Polling Place I.D. (____), select type of voting, confirm configuration, print Zero Tape, and unplug eScan or JBC.
10. Equipment is ready.



- **Troubleshooting:** Restart voting device, restart SERVO, and check network connections and settings. (PC Network settings must be compatible with eScan; Start/Settings/Network and Dial-up Connections/Local Area Connection/TCP/IP/Properties/Use the following address.) Disable and then enable the network connection. Run ipconfig command prompt. Retry.

- **Module 6: Simulation/Assessment** (*Timing: 30 minutes*)
NOTE: All exercises in the simulation include “qualifying” voters in a mock poll book and choosing correct precincts on the JBC.
- ▶ **Simulated Polling Place Exercise (Reset first)**
 - ▷ Rotate roles and run polling places using the eSlate System Desk Reference as a guide. Walk through:
 - ▷ Set up (if possible)
 - ▷ Instructing and assisting voters
 - ▷ Opening Polls – Six-character passwords are mandatory
 - ▷ Adding Voters and casting ballots (use write-in and straight party, if available)
 - ▷ Adding Voters with Provisional Ballots, if applicable, and casting ballots
 - ▷ Checking an access code
 - ▷ Printing an “Access Code Report”
 - ▷ Canceling a booth
 - ▷ Changing the JBC printer paper
 - ▷ Suspending and Re-opening the polls OR Closing the polls (six-character passwords mandatory)
 - **Exercise/Assessment 6.1:** Complete the simulation tasks.
- ▶ **Self-assessment “Checkpoint”/Assessment** (*Timing: 10 minutes*)
 - ▷ Give self-assessment “Checkpoint” in individual setting, collect.
 - ▷ **INSTRUCTOR RESETS (AND PREDEFINES) EQUIPMENT DURING SELF-ASSESSMENT “CHECKPOINT”.** Trainees disconnect and pack equipment upon turning in self-assessment “Checkpoint”.
 - **Exercise/Assessment 6.2:** Complete the Self-assessment “Checkpoint”.
- ▶ **Disconnecting equipment (after reset)** (*Timing: 20 minutes*)
 - **Exercise 6.3:** Power down and disconnect the eSlate equipment. Do not remove the DAU card or MBB. Assemble paperwork. Pack the equipment, including the Caddy, as that will be part of your duties at the polling place. Review Reference Documents.

- **Review/Appendices** (*Timing: 10 minutes*)
 - ▷ Troubleshooting – Note: passwords required every time power is recycled.
 - ▷ Ensuring Polling Place Security
 - Secure access to the physical facility
 - Secure delivery procedures
 - Restricted access to JBC and MBBs
 - Access Code Management
 - Secure eSlate booths and voting area
 - ▷ Hart Voting System Security
 - ▷ Guide to Serving Voters with Disabilities
 - ▷ FAQs
 - ▷ Glossary

- **Review/Closing** (*Timing: 5 minutes*)
 - ▷ Review Self-Assessment “Checkpoint” answers (if appropriate and if time allows)
 - ▷ Parking Lot Questions and Review
 - ▷ Q&A
 - ▷ Evaluation forms (limited number – first, middle, and final names on the sign-in sheet)

After-class Responsibilities:

1. **Score Self-Assessment “Checkpoints”, denote score on sign-in sheet to the right of each trainee’s name, and file Self-Assessment “Checkpoints” in the envelope for runner pick-up.**
2. **File sign-in sheet in the envelope for pick-up.**
3. **File evaluations in the envelope for pick-up.**
4. **Pick up trash and tidy up room.**
5. **Set out materials for the next class.**
6. **Make certain booths are secure in Caddies.**
7. **Check paper in demo JBC.**
8. **If you are the last class for the day, power off all equipment.**

Equipment List

A list of probable items needed for training (with an estimate of quantity). All trainees should go through a hands-on eSlate demonstration before any other training, if possible.

	Item	Quantity	Ratio	Notes
Hardware	Power strip(s)/Surge protector(s)			
	Extension Cords			
	Judge's Booth Controller(s)		1:1 – 4 trainees	JBCs must be programmed in advance with training signing key
	JBC printer paper rolls			
	eSlates		1: 1 or 2 trainees	
	DAU(s)		1:1 or 2 trainees	
	eSlate booths			
	VBO printer paper rolls			
	eSlate battery packs			
	JBC Battery packs			
	MBB(s) with relevant ballots/Labels			
	DAU cards & Labels			
	Headphones			
	Tactile Input Switches			
	JBC Reset Cable	1		
	SERVO Computer	1		
	Presentation Computer			
	Presentation System (speakers)			
LCD Projector				
PC speakers (if no presentation system)				

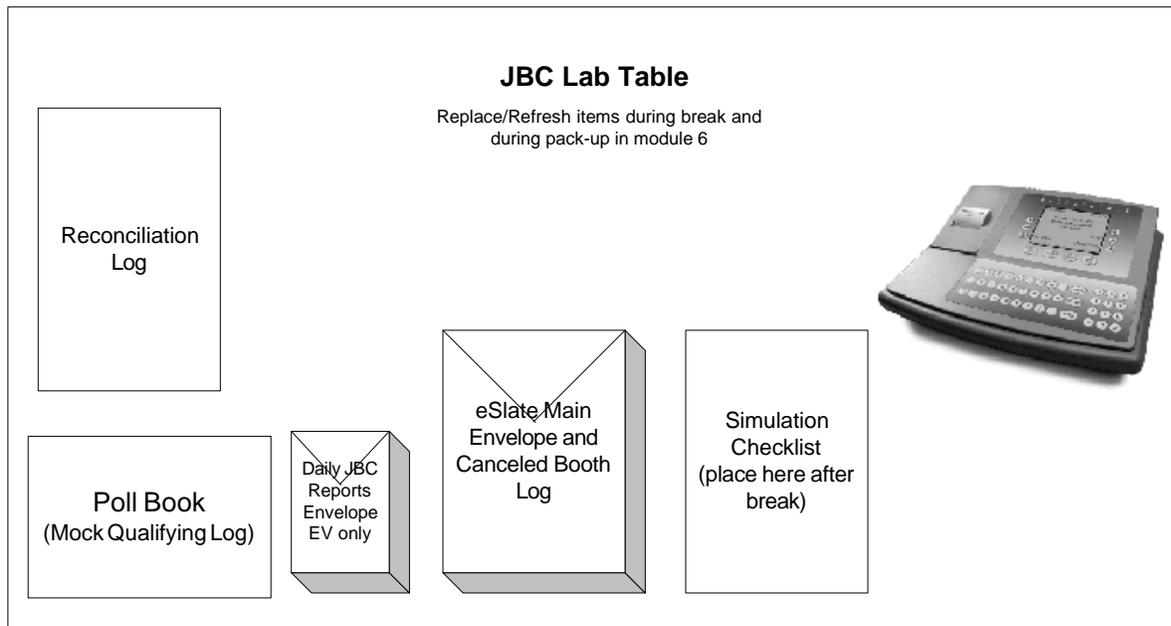
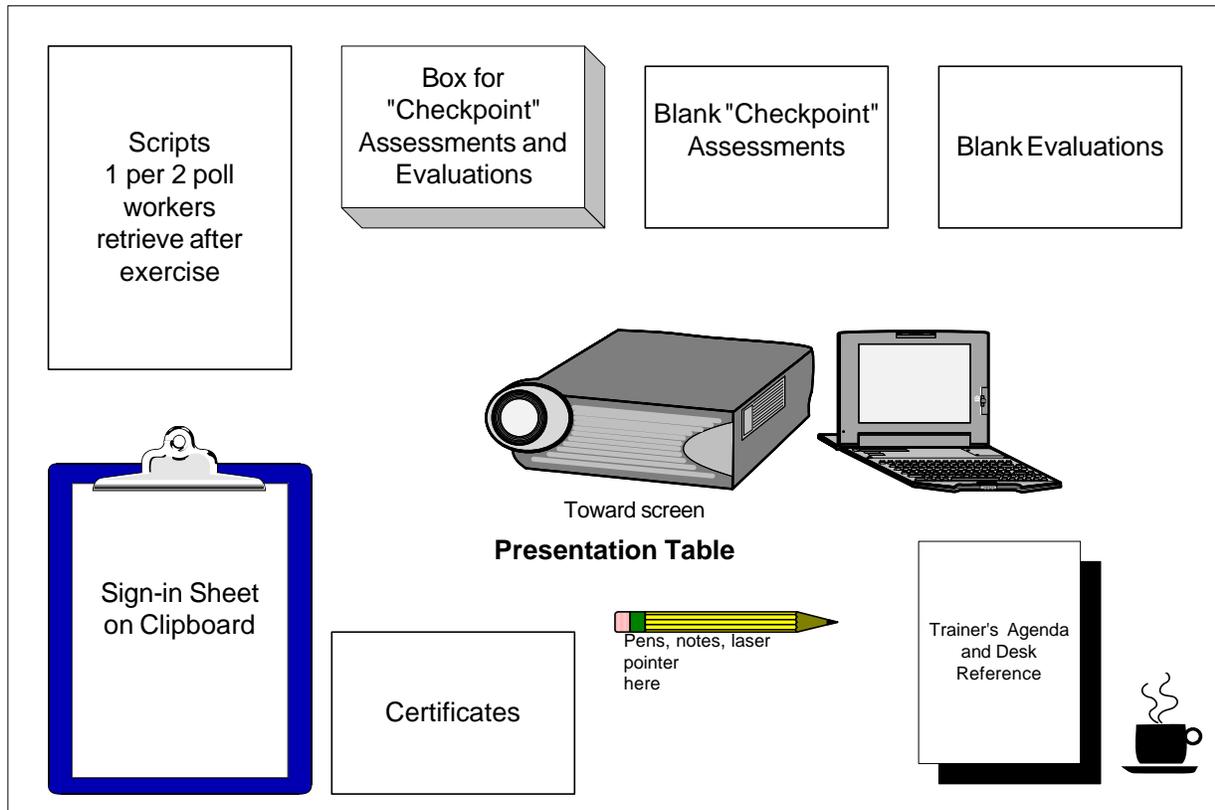
	Item	Quantity	Ratio	Notes
Miscellaneous Supplies	Daily JBC Reports Envelope			
	eSlate Main Envelope			
	Agenda			
	Name Tags		1:1	
	Glass cleaner and soft cloth	1		
	Pens		1:1	
	Markers			
	Clipboard(s)	1		
	Screwdriver(s)	1		
	Laser Pointer	1		
	Presentation Screen	1		
	PowerPoint Slideshow(s)	1		
	Set up video/mpeg			
	How To Vote video/mpeg			
	U.S. Flags			
	Tape			
JBC security seals	1/JBC			

	Item	Quantity	Ratio	Notes
Documentation	eSlate Polling Place System DR		1:1	
	eSlate System Quick Ref.		1:JBC	
	Voter Registration Computer TM			
	eSlate Script Placard		1:2 trainees	
	Voter Instructions flyers		samples	
	Voter Instructions Placards		1/booth	
	Flag Placard		1/booth	
	Simulation Checklists		1/lab station	
	Ppops self-assessment "Checkpoint"		1:1	
	Polling Place ID list			
	Password list			
	Mock Qualifying Station Log for PPOps	1		
	Reconciliation Log		2:JBC: session	
	Canceled Booth Log		2:JBC: session	
	Training Evaluation forms		3:class	
	Sign-in Sheet		1:class	
	Certificates		1:1	

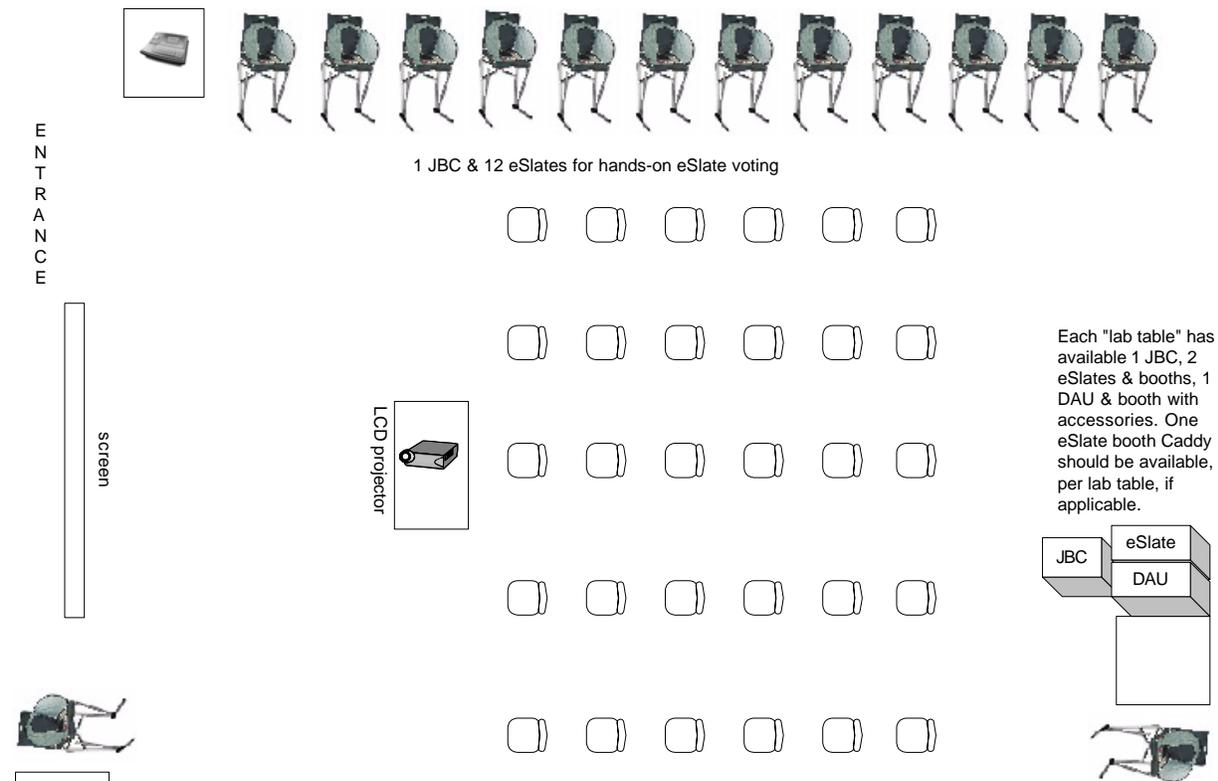
Document Use for Polling Place Operations Training

At Central Table	Give to Trainees	At the JBC
Sign-in sheet	eSlate System Desk Reference (on chairs)	eSlate System Quick Reference (optional)
	eSlate picture w/ script (for exercise 1.1, 1 per 2 trainees and retrieve materials)	Reconciliation Log
	Trainee Self-assessment "Checkpoint"	Main and Daily (EV only) JBC Reports Envelopes w/ logs (Cancelled Booth Log)
	Training Evaluation (2-3 per class)	Mock qualifying log (poll book)
		Simulation Checklist (after break)

Document Layout on Tables



Physical Classroom Layout



POLLING PLACE OPERATIONS TRAINING

Ideal Classroom Size: at least 30' x 60', or 1800 - 2000 square feet (this graphic not to scale)

Trainers: 1

Jurisdiction Personnel: 1

Trainees: Will vary, usually 20 - 24 max per class Early Voting training, 20 - 32 for Election Day training

Time allotted per session: 4 hours

Materials: 7 JBCs, 24 eSlates, 7 DAU eSlates, 7 MBBs with training ballot, 7 DAU cards, 7 JBC battery pack sets, 7 eSlate battery packs, 7 sets of headphones, 7 sets of tactile input switches, 8 surge protectors w/o on/off switches, 8 extension cords, 8 tables, 1 booth per eSlate, 1 wheelchair accessible booth per DAU eSlate, 6 booth Caddies (if applicable), at least 20 extra rolls of JBC tape, 1 LCD projector, 1 screen, chairs, reset utility on a laptop, training supplies.

Process: Upon arrival trainees sign in and are then given eSlate instructions and practice voting on the eSlate. Desk Reference documents are available, and trainees peruse these in as they sit. Quick References and logs are on the tables. Training is directed with a PowerPoint presentation, video, and hands-on experience with the JBC and eSlates. Modules include Instructing Voters, Setting Up, Opening Polls, Assisting Voters from the JBC, Operating the DAU and curbside features, Closing Polls, and packing equipment. Direct training lasts for 4 hours with one break. Questions are encouraged. Course includes a simulation and a self-assessment "Checkpoint" review.

County Responsibilities for Equipment per Site:	Site Responsibilities for Equipment:	Hart Responsibilities for Equipment per Site:
7 JBCs 24 eSlates 7 DAU 8 MBBs with training ballot 8 DAU cards with audio Battery Packs for equipment 7 sets of headphones 7 sets of jelly switches 8 surge protectors w/o on/off 8 extension cords booths DAU booths 20 extra rolls of JBC tape, min	8 tables 32 chairs 1 screen 1 LCD projector, if available 1 presentation system, if available (mic and speaker set up)	1 LCD projector, if not available per site 1 presentation system, if not available per site 1 laptop for slideshow 1 laptop for reset 1 laser pointer Training documentation

Hart Voting System Device Troubleshooting Course

Training Agenda

Timing:

0 Hour	Introduction Expectations/Responsibilities
+15 Minutes	Polling Place Operations Training and Security
+1:30	Break
+ 1:45	HVS Troubleshooting Support Team Procedures and Documentation Trainee Exam and Review
+3:45	Closing

Audience: Support personnel – warehouse specialists, field technicians, help desk operators, etc.

Objectives: After completing this course trainees will have background information on how to set up the Hart Voting System polling place components. Trainees will run the Judge's Booth Controller (JBC) and eScan, including opening and closing the polls. Trainees will have information on how to pack up the equipment. Trainees will troubleshoot device situations and learn the security features of the system.

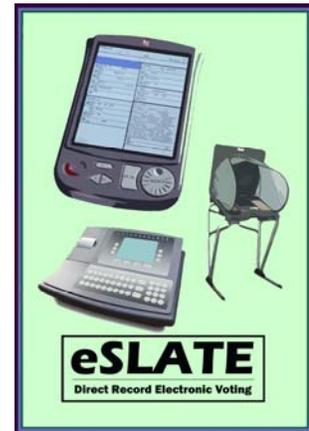
Benefits of the System: The eScan, eSlate and JBC are lightweight, simple to operate with on-screen prompts, and easy to monitor. With the JBC, it is easy to get the voter's correct ballot style/precinct (or party affiliation, if applicable). There is no way a voter can overvote, and voters are reminded of their undervotes on the eSlate. Voters with disabilities have an equal and private access to voting. The eScan offers optical imaging technology with a paper ballot system that is integrated with the eSlate.

Manuals: eSlate System Desk Reference, eScan System Desk Reference Troubleshooting section of Hart Voting System Support Procedures Training Manual

Other Materials: Problem Documentation and Observation Log, PP ID list, Tags, Module 2 setup video/mpeg, How to Vote video/mpeg and PowerPoint slideshow(s), MBBs and DAU Cards.

Prerequisite: Hands-on demonstration with the eSlate. Trainees will use the system as if they are voters if they arrive early.

Time allotment: 4 hours



Getting Started/Opening:

1. Trainees enter classroom and vote on the eSlate. Facilitator prints Access Codes and gives voter instructions.
2. Trainees seat themselves in classroom area and sign in (pass sign-in sheet around on a clipboard).
3. Greet trainees, introduce yourself, and outline format, breaks, use of the “Parking Lot” for questions, and start the slide show.

Teaching Points:

Part 1:

DR page

- **Module 1: Getting Started/ Responsibilities (Teach with mpg/Slideshow – no hands-on)**
 - ▶ Getting Started: training manual overview, Hart Voting System overview, benefits to trainees and course objectives
 - ▷ Techs are working with equipment issues only!
 - ▷ Tech responsibilities
 - ▷ Tech documentation – review materials in tech packets
- **Module 2: eSlate Setting Up (Teach with mpeg/video)**
 - ▶ Setting up the JBC
 - ▶ Setting up the eSlates and DAUs (battery packs)
 - ▷ eSlate booths and Caddies
 - **Exercise 2.1:** Set up eSlate Polling Place components.
 - ✓ **Review:** How can you tell that the eSlate is on battery power? JBC?
- **Module 3: eSlate Opening the Polls**
 - ▶ Opening for Election Day assignment
 - ▷ JBC initialized
 - ▷ Assign Booth Numbers
 - ▷ Printing the Zero Tape
 - ▷ Opening the Polls (password required)
 - **Exercise 3.1:** Open the polls for an Election Day session. Verify Polling Place and file reports in the appropriate envelope. NO LOG.

PPT Slide

- **Module 4: Working With Voters from the JBC**
 - ▶ Adding Voters
 - ▶ Through the JBC
 - Exercise 4.1:** Add a voter (Select precinct and party, as applicable). Vote and cast a ballot on an eSlate. Note Access Code on JBC screen.
 - ✓ **Review:** How do you select the voter's precinct on the JBC?
 - ▶ How to tell when a Voter Needs Help
 - Exercise 4.2:** NOT APPLICABLE
 - ▶ Adding a Provisional Voter
 - Exercise 4.3:** NOT APPLICABLE
 - ▶ Checking an access code
 - Exercise 4.4:** NOT APPLICABLE
 - ▶ Canceling a booth
 - Exercise 4.5:** NOT APPLICABLE
 - ✓ **Review:** At the polling place, what will help poll workers remember the steps and procedures for running the JBC?
 - ▶ Working with Voters with Disabilities
 - Exercise 4.6:** Try the DAU headphone feature. Show the tactile input switches – example only (no exercise). Identify hardware connection ports.
 - ▶ Curbside Voting
 - ▷ Show trainees curbside procedures – slideshow and example only (no exercise)
 - ✓ **Review:** What must be done first in order to take the curbside unit out to a voter?
- **Module 5: eSlate Closing the Polls**
 - ▶ Closing the Polls for Election Day (password required)
 - Exercise 5.1:** Close the polls for Election Day. Print appropriate reports as per implementation. NO LOG.
 - ✓ **Review:** At the end of the day (Election Day or the last day of Early Voting), what items go to the Counting Station?

➤ **Module 6: eScan Setup and Opening Polls**

▶ Setting up the eScan at the Polling Place

- **Exercise 6.1:** Remove the eScan cover; Open the Ballot Box door; Remove the Emergency Ballot Receptacle; Open and close the Emergency Ballot Slot

- ✓ **Review Questions:** Where should the eScan be located in the polling place? Where is the Emergency Ballot Slot? When would you use it?

▶ eScan - Opening for Early Voting (day 1), or Election Day

- ▷ Orientation to device
 - Explain/demonstrate how passwords are entered
- ▷ Connect to AC power supply
- ▷ eScan self-diagnostic
- ▷ eScan start-up password (only if not predefined)
- ▷ Printing the Zero Tape Report
- ▷ Opening the Polls – Six-character passwords are mandatory
 - **Exercise 6.2:** Open the polls for an Early Voting session if that is the election type for which you are training. Open the polls for an Election Day session if that is the election type for which you are training. File reports. NO LOG.
 - ✓ **Review Question:** Where do you put the Open Polls reports?

➤ **Module 7: Working With Voters from the eScan**

▶ Processing a Ballot

NOTE: Ballot processing will be determined by eScan settings in BOSS. Review these, and set up training ballot to use identical settings.

- ▷ How voters use the “Next Contest” button, if applicable
- ▷ How poll workers use the Poll Worker override button
 - **Exercise 7.1:** Scan and process a marked ballot as if you are a voter. Process a write-in, if applicable. Respond to eScan screen prompts, including those as if you are a poll worker.
- ▷ Emergency ballot processing procedures (Emergency Ballot Slot)
 - Power outage, eScan (and eSlate) disabled
 - *Find out jurisdiction preference whether to use emergency paper ballots or to continue voting on the eSlate system alone.*
 - **Exercise 7.2:** As a group, process a ballot in the Emergency Ballot Slot due to role play of complete polling place power outage (including eSlate battery).
 - ✓ **Review Questions:** What happens when you press the Poll Worker button? When is the Emergency Ballot Slot used?

➤ **Module 8: eScan Closing the Polls**

- ▶ Closing the Polls for Election Day – Six-character passwords are mandatory
 - ▷ Consolidating MBB data on the eScan
 - **Exercise 8.1:** Close the polls for Election Day and print and read the eScan Tally Report (and/or Daily Detail report, depending on implementation), if you are participating in an Election Day training event.
 - **Exercise 8.2:** Remove the JBC MBB and consolidate MBB data and print the consolidated Tally Report from the eScan, if applicable. Complete the Reconciliation Log and file reports. Place MBBs and seals in appropriate transfer envelopes.

BREAK – 15 minute break
Instructors Reset and Predefine equipment here

System Reset Procedure with SERVO:

In order to reset equipment, the instructor must have Hart InterCivic's SERVO application. The instructor must be a SERVO user with "Admin Reset" permissions. The instructor also needs cables for connecting the SERVO computer to the polling place equipment, a network crossover cable for the eScan, and a parallel cable for the eSlate system. These cables are included with the SERVO computer, which is usually a laptop.

1. Leave the MBB in the device (it will be reset to zero Cast Vote Records, making it reusable for another training event), and power on the device. **Make certain that all voting equipment is powered on. This may take up to 12-15 seconds.**
2. Audio Cards do not need to be removed from DAU eSlates in order to reset.
3. If using the eSlate system, up to 12 eSlates (booths) may be connected to the JBC in a daisy chain.
4. Select the SERVO shortcut on the PC desktop and log in to the SERVO application.
5. Go to the SERVO **Admin Tools** menu and click **Device Reset**.
6. Connect the cable from the SERVO PC to the JBC or eScan.



For JBCs, connect to the printer port. For eScans, connect to the network port. In the **Device Reset** window, select the radio button for the device type. Wait for the **Device Reset** window to confirm that the device has been reset (lower left corner of the window) and listen for the audible "ding."

7. Each device screen will display a message confirming that the reset is complete.
8. After resetting all equipment, proceed to predefine equipment, for the next training session, if applicable.
9. To predefine, duplicate warehouse steps that would be performed prior to sending out JBC and/or eScan equipment. (eSlates are NOT connected to the JBC for this process.) Unplug and restart the eScan or JBC, enter the Start-Up Password, Polling Place I.D. (____), select type of voting, confirm configuration, print Zero Tape, and unplug eScan or JBC.
10. Equipment is ready.



- **Troubleshooting:** Restart voting device, restart SERVO, and check network connections and settings. (PC Network settings must be compatible with eScan; Start/Settings/Network and Dial-up Connections/Local Area Connection/TCP/IP/Properties/Use the following address.) Disable and then enable the network connection. Run ipconfig command prompt. Retry.

➤ **Security Features of the Hart Voting System:**

Security, reliability and accuracy are always going to be issues with our election customers. Hart offers excellent security by using access codes to enable voter access to a specific ballot style, without compromising voter privacy. The access code is not tied to the cast ballot. The cast ballot is saved redundantly in the eScan or eSlate unit, in the JBC, and on the PC card we call the Mobile Ballot Box. Cast vote records are saved with flash memory, and are not affected by power outages, power spikes, or magnets.

The auditing capabilities of this system allow for both manual (paper) and electronic recounts as necessary. The major election system components that create ballots, allow voters to cast their votes, and the vote tallying system are separate system components. Each precinct is a secure network, with no external network access that would allow intrusion.

Integrated security features prevent tampering with ballots or results and data cannot be altered or changed because the database structure is proprietary and can only be read or written to by the proprietary software.

Each MBB is programmed with an encrypted digital “signing key” that the jurisdiction creates. Each eScan and JBC is also programmed with this signing key. This signing key data must match, or the eScan or JBC will not access the MBB.

All data from the polling place devices is backed up after an election. The software, or “firmware” on each device can be confirmed to match the state certified version at any time, and the jurisdiction is encouraged to confirm this both before and after every election.

Part 2:

DR page

➤ **Module 9: Troubleshooting guide**

▶ **Systematic Approach to Troubleshooting**

- ▷ Identify the issue
- ▷ Gather further information
- ▷ Establish a theory
- ▷ Research
- ▷ Attempt resolution
- ▷ Check for success
- ▷ Repeat
- ▷ Always check connections

- **Exercise 9.1:** Ask trainees to list the critical steps in the troubleshooting process. List on board or tablet, if possible. Compare to the “Systematic Approach” list.

PPT Slide

DR page

Module 9: Troubleshooting guide – We will simulate some “What If” situations with the system (USE TABLE AS TEACHING GUIDE):

- ▶ Use of the Call Log
- ▶ eSlate Troubleshooting
 - ▷ Aborted Access Code Report
 - ▷ Battery Operations
 - ▷ Connecting eSlate battery packs
 - ▷ Connecting JBC battery packs
 - ▷ JBC and eSlate battery power when closing polls
 - ▷ When eSlate or JBC batteries do not work
 - ▷ Close Polls button pushed too early
 - ▷ Curbside eSlate errors (note – in system 6.2 the eSlate can be reconnected)
 - ▷ DAU audio card errors
 - ▷ DAU audio card removal
 - ▷ DAU headphones or tactile input switches do not work
 - ▷ eSlate or DAU eSlate does not work
 - ▷ eSlate replacement
 - ▷ Extra Access Codes
 - ▷ Firmware Mismatch
 - ▷ Invalid Card
 - ▷ JBC does not work
 - ▷ JBC Early Voting Question answered incorrectly
 - ▷ JBC fuse replacement
 - ▷ JBC replacement
 - ▷ MBB error
 - ▷ MBB removal
 - ▷ “Old Election Data” message on eSlate
 - ▷ Password error
 - ▷ Power fails
 - ▷ Power status
 - ▷ Printer error/Disabled Printer
 - ▷ Printer Paper, changing
 - ▷ Restarting the JBC
 - ▷ Screen on eSlate or JBC is dark
 - ▷ VBO error codes and resolution steps
 - ▷ VBO printer, field replacement
 - ▷ Voter enters the wrong language choice
 - ▷ Voter gets the wrong ballot style
 - ▷ Voter needs DAU features
 - ▷ Voter’s precinct I.D. on the JBC
 - ▷ Voter’s party affiliation on the JBC
 - ▷ Voter registration computer does not work
 - ▷ Voter requests a receipt
 - ▷ Other JBC screens that may appear

PPT Slide

- **Module 9: Troubleshooting guide (continued)**
 - ▶ eScan Troubleshooting
 - ▷ Error Codes that may display
 - ▷ eScan does not work
 - ▷ eScan replacement
 - ▷ Incomplete MBB consolidation
 - ▷ MBB removal
 - ▷ Paper (ballot) jam
 - ▷ Password is invalid
 - ▷ Polling place I.D. and/or Voting Type identified incorrectly
 - ▷ Polls closed too early
 - ▷ Power fails
 - ▷ Power status
 - ▷ Printer Paper, changing
 - ▷ Reports, printing
 - ▷ Restarting the eScan
 - ▷ Screen on eScan is dark
 - **Exercises:** One exercise per situation. See Troubleshooting Instruction Guide on page 11.
 - ✓ **Review:** What would you do if a piece of equipment stops working working? JBC? eSlate or DAU? eScan?
 - **Simulation Exercises (if time allows):** Send trainees out of the room and simulate a different problem at each station. Have trainees return and troubleshoot. Repeat as time allows. See Simulation Exercises on page 16.
- **Review/Appendices**
 - ▶ Desk References Glossary of Terms
 - ▶ Desk References Troubleshooting
 - ▶ Desk References FAQ
 - ▶ Desk References Security
 - ▶ “Parking Lot” items
 - ▶ EXAM-Instructors Reset and Predefine equipment here – SCORE EXAMS
- **Disconnect and Pack Equipment (Reset First)**
- **Closing**
 - ▶ Conclude the training (Possibly hand out ED equipment)
 - ▶ Instructors Reset but *do not* Predefine replacement equipment between classes

Issues to Clarify and Communicate before Troubleshooting Training

These issues should be resolved by trainers, training manager, account manager and jurisdiction contacts. Refer to Stock Training Configuration and Business Analysis documents.

Topic:	Notes:
Who is responsible for setting up the polling places?	
What will the battery backup procedures be?	
Will we be using "Predefine" procedures?	
What are the help desk numbers?	
When do poll workers call the help desk?	
Will there be an election management /VR system in place that prints the access code?	
Are there procedures for testing the VR computer, if applicable, every morning?	
Will techs be replacing equipment? If so, what is the procedure for original equipment?	
Will training exam for techs be used? If so, how? What will procedure for failing score be?	
Will temporary techs have cell phones?	
Where will temporary techs drop off unused replacement equipment?	
Will the responsibilities document be used? If so, what are the details?	
Will Troubleshooting Logs be used? How?	
Will cluster maps be used? How?	
Will equipment be tagged? How?	
What will be connected to the DAU eSlate at the warehouse?	
Will VBO printers be used?	

Troubleshooting Instruction Guide

TM Page	Troubleshooting Topic	Notes
	Introduction/Responsibilities	
	Call Log	
eSlate Setup Issues		
	eSlates read "Unavailable"/Restarting the System	Restart and assign booths
	eSlates read "Old Election Data"	Discuss pulling the eSlate booth
eSlate Power Issues		
	AC unavailable when opening polls	Discuss starting eSlates using Cast Ballot + Enter
	Battery Operations/Power Status/Power Fails	ID battery indicators on JBC, eSlate, fan on JBC, Pull the AC plug
	Batteries shut down before close polls reports are finished (if on battery only)	Discuss and ID steps
	Connecting eSlate Battery Packs	Disconnect and reconnect on unit
	Connecting JBC Battery Packs	Disconnect and reconnect on unit
	Darkened and/or hot eSlate or JBC screen	Discuss issue and steps – get it out of sunlight, check battery connections and AC
NA	Aborted Access Codes Report	Simulate power failure when voters are at booths.
eSlate Issues		
	Bent Pins	Observe pins at booth and at eSlate – Discuss steps for bypass, pull, fix, re-insert or replace
	eSlate/DAU does not work (Tag, DAU card and battery pack switch with original)	Simulate what happens when one or more of the units quit working Discuss steps for bypass, checking pins, and Old Election Data Bypass first, then replace the eSlate/DAU
	Firmware Version Mismatch	Discuss eSlate drop-off. Use Configuration report to verify firmware mismatch. Replace.
	Internal Alert	Discuss, ID steps of power off, disconnect and reconnect battery, power on – replace the eSlate/DAU on 2 nd occurrence
DAU Issues		
	Curbside eSlate errors	Simulate when there is no battery, and/or access code is not entered.
	DAU card removal	See next line
	DAU card error/System Alert	Take out card, view message, insert, and restart
	DAU headphones or TIS do not work	Partially unplug, switch, and troubleshoot

TM Page	Troubleshooting Topic	Notes
JBC Issues		
	MBB removal	(Optional) Take out MBB, view error, insert.
	MBB error	(Optional) Put DAU card in JBC, view error, replace with MBB
	Password error	NA
	Close polls button pushed too early EV/ED	Discuss, simulate if EV training
	Printer errors/disabled printer	Move lever, disable, add voter, correct, enable
	Printer paper, changing	Change printer paper
	Reading JBC reports	NA
	Extra access code	Check Code and file
	JBC does not work/Close polls button pushed too Early for ED	Replace JBC (Tag, battery packs), predefine Steps (need PP I.D. list)
	Printing reports after closing polls and powering off	Power off JBC then re-connect power
	Other screens that may appear	Refer to TS doc
VBO Issues		
	Error code displays	Refer to error codes, show external power connection and eSlate/booth data connection
	Replacing VBO unit	Remove and replace unit
eSlate Voter Issues		
	Voter enters wrong language choice	NA
	Voter gets wrong ballot style	NA
	Voter needs DAU features	NA
	Voter's precinct I.D. on the JBC	Review
	Voter requests a receipt	NA

TM Page	Troubleshooting Topic	Notes
eScan Setup Issues		
	Polling Place I.D. and/or Voting Type identified incorrectly	<ul style="list-style-type: none"> □ Refer to the “Election Identification” report to confirm polling place name and type of voting. □ Refer to any report header to confirm the Polling Place name. <ul style="list-style-type: none"> ▪ If incorrect, replace the device.
	Audio volume is set incorrectly	<ul style="list-style-type: none"> A. Press the Poll Worker button to access the Poll Worker menu. B. Press the AUDIO button and follow prompts to increase or decrease volume. C. Press the EXIT buttons.
eScan Power Issues		
	AC power fails without UPS battery backup	<ul style="list-style-type: none"> A. Check all power connections. B. <u>Call the Elections Office or Help Desk</u> to notify them of the situation. C. Unplug the eScan from the wall outlet. A. Have voters use the Emergency Ballot Slot for ballots until power returns.
	Password does not work	<ul style="list-style-type: none"> A. Verify password. B. On the error screen, press the button next to CONTINUE and reattempt sequence with correct password.
eScan Operation Issues		
	Printer error	<ul style="list-style-type: none"> A. Check paper orientation. B. Check feed lever. C. Select RETRY.
	Printer paper, changing	<ul style="list-style-type: none"> A. Open the lid of the printer compartment and note printer paper routing. B. Lift feed lever. C. Remove old paper and insert and route new paper. D. Push feed lever to the down position. E. Feed paper through lid and close lid.
	Error code displays	<ul style="list-style-type: none"> A. Insert a ballot into the scanner askew. B. Refer to Error Code List in either this document or the Desk Reference. C. Follow procedures for that specific error code. D. Have voters use the Emergency Ballot Slot, if necessary.

TM Page	Troubleshooting Topic	Notes
eScan Operation Issues		
	MBB removal error	<ul style="list-style-type: none"> A. Only remove the MBB if your instructions specifically call for this. B. Break the MBB door security seal. C. Press the MBB eject button. D. Pull the MBB out. E. View the error code. F. Replace MBB and restart the system.
	Paper (ballot) jammed in eScan	<ul style="list-style-type: none"> A. Fold ballot and scan to jam device. B. Lift external scanner cover. C. Lift internal scanner cover. D. Remove ballot and blow scanner path clean with a pressurized air canister. E. Close covers and rescan ballot (or replacement ballot if original spoiled).
	eScan screen is dark	If the unit has been in direct sunlight, or in a closed vehicle, move it to a shaded, cooler, area.
	eScan does not work	<ul style="list-style-type: none"> <input type="checkbox"/> Check all connections. <input type="checkbox"/> Restart the device. <input type="checkbox"/> Simulate polls closed too early <input type="checkbox"/> Replace the eScan
	Restarting	<ul style="list-style-type: none"> A. Make certain voters have access to the Emergency Ballot Slot on the eScan ballot box. B. Press the power switch to OFF. C. Wait 30 seconds. D. Press the power switch to ON and follow prompts on the eScan screen.

TM Page	Troubleshooting Topic	Notes
eScan Close Polls Issues		
	Incomplete MBB consolidation	<p>A. If MBB consolidation for Election Day tabulation was performed without including all MBBs that should have been included, from the Polls Closed screen “Select an option below or turn power off when finished”, select RETRY.</p> <p>B. Follow prompts to insert other device MBBs, reinsert the original MBB, and print the finished “Tally” report.</p>
	Reports after closing or suspending polls AND powering off	<p>If you must restart the eScan to print reports after polls are suspended/closed:</p> <p>A. Power on the eScan.</p> <p>B. Enter the password requested and press the button next to ACCEPT.</p> <p>C. In Early Voting mode, press the Poll Worker Button and follow prompts to enter passwords, suspend the polls, and print the DAILY DETAIL.</p> <p>OR</p> <p>A. In Election Day mode, follow prompts to CONTINUE to print the “Tally” report or to print the DAILY DETAIL.</p> <p>B. Follow prompts to PRINT TALLY.</p>
	Polls Closed Early	<p>A. In Early Voting, restart the system.</p> <p>B. On Election Day, verify that a Polls Closed screen is displayed and replace the eScan.</p>

Simulation Exercises

TM Page	eSlate Problems	How to simulate
Setup Problems		
	Booth feet setup incorrectly	Situation 1: Set up booths without extending feet. Situation 2: Set up booths with feet on backwards
	No battery power	Situation 1: Disconnect batteries on JBC Situation 2: Disconnect batteries on eSlate
	AC[None]	Situation 1: Unplug AC from the wall Situation 2: Loosen AC plug in rear of JBC until JBC displays AC[None]
	AC power out while opening polls	Situation 1: remove fuse so trainees must open polls w/out AC power
	Booths say unavailable	Situation 1: Open polls w/out assigning booths
Reported Problems (note: for these problems you will need to explain the symptoms to trainees)		
	Headphones do not work	Situation 1: Turn down headphone volume Situation 2: Unplug headphones Situation 3: Plug headphones into wrong jack Situation 4: Unseat audio card
	Booth will not take an access code	Situation 1: Unplug pigtail Situation 2: Unplug pigtail & reconnect (curbside error) Situation 3: Unplug cable at back of booth Situation 4: Unplug cable at rear of JBC
	Printer problems	Situation 1: Flip printer lever up Situation 2: Disable printer Situation 3: Leave paper under printer door
	Polls closed too early EV	Situation 1: Close polls on JBC
TM PAGE	eScan Problems	How to Simulate
	Error codes	Situation 1: Insert ballot askew Situation 2: Insert ballot with damaged barcode Situation 3: Insert ballot from wrong party or precinct
	Polls closed too early EV	Situation 1: Close polls
	MBB removal error	Situation 1: Remove MBB without closing polls
	Printer problems	Situation 1: Flip printer lever up Situation 2: Leave paper under printer door
TM Page	VBO Problems	How to Simulate
	Communication error	Situation 1: Disconnect AC cord from wall Situation 2: Disconnect AC connection under VBO Situation 3: Disconnect data cable under VBO Situation 4: Disconnect wires from underside of booth data contact
	Paper out error	Situation 1: Remove paper from VBO
	Battery low error	Situation 1: Disconnect battery inside VBO

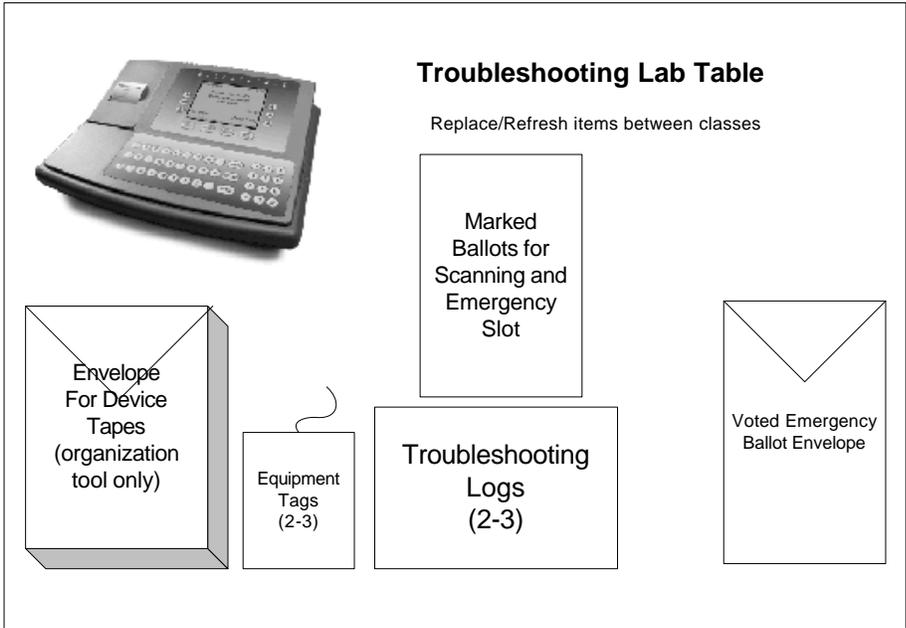
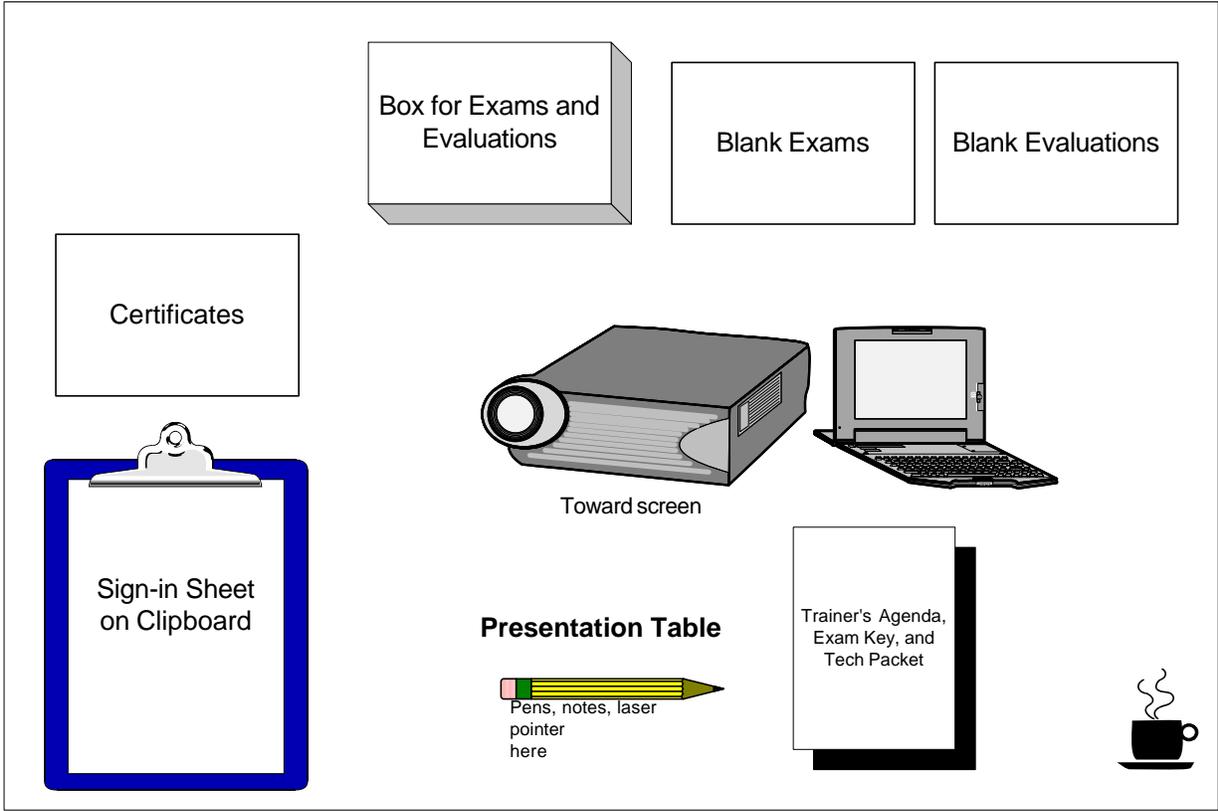
Equipment List

	Item	Quantity	Ideal Item: User Ratio	Notes
Hardware	eCM key	1		With training signing key data (backup for trainer)
	ATA Card Device			Backup for trainer
	Power strip(s)/Surge protector(s)		1 per lab station and 1 for LCD/PA	5 lab stations with 4 trainees assigned to each.
	Extension Cords		1 per lab station and 1 for LCD/PA	
	Judge's Booth Controller(s)		2: lab station	Programmed with training eCM signing key data
	eScan Devices		2: lab station	
	Printer paper rolls		1 per JBC	Extras needed
	eSlates		2 : lab station	1 extra per station
	DAU(s)		1: lab station	1 extra per station
	eSlate booths		1 per unit	
	Paper ballot booths		1: lab station	
	eSlate battery packs		1 per unit	
	JBC Battery packs		2 per unit	
	MBB(s) with relevant ballots/Labels		1 per JBC or eScan	With training election
	DAU cards & Labels		1 per DAU	
	Headphones		1 per DAU	
	Tactile Input Switches		1 per DAU	
	JBC Reset Cable	1		
	Network Crossover Cable	1		
	SERVO Computer	1		
	Presentation Computer	1		
	Presentation System	1		
	PC speakers	1		
DAU unit for practice with screen, cables, DAU module replacement				
eSlate screen replacement kit				

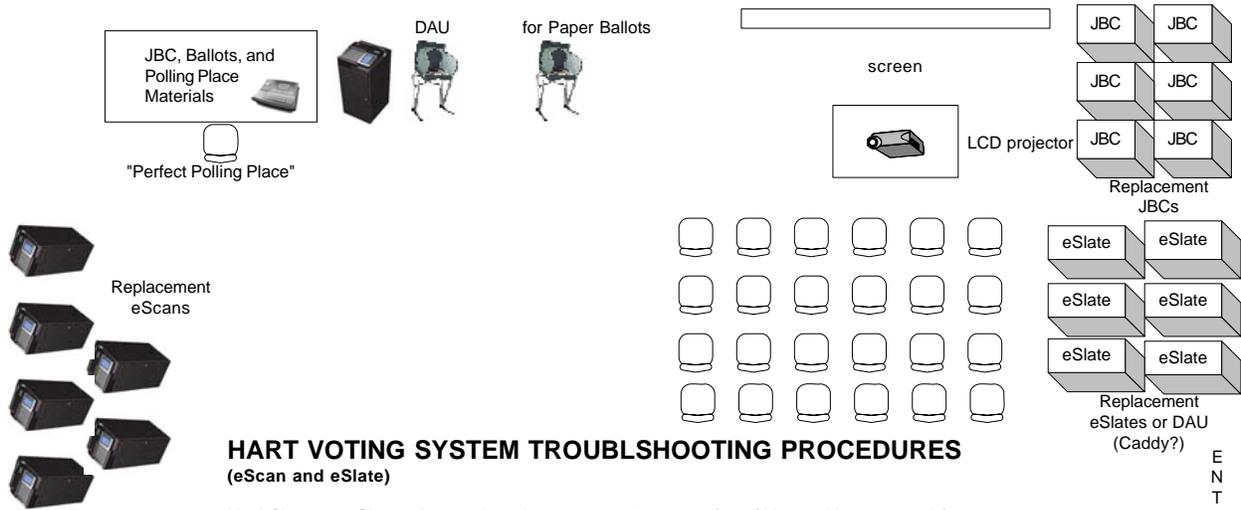
	Item	Quantity	Ratio	Notes
Documentation	Troubleshooting Section of Support Procedures Manual		1:1	
	eSlate System Desk Ref.		1:1	
	eScan System Desk Ref.		1/JBC	Optional
	HVS Troubleshooting exam		1:1	
	Canceled Booth Log			
	Spoiled Ballot Log and Envelope			
	Voted Emergency Ballot Envelope			
	Sign-in Sheet		1:class	
	Certificates		1:1	
	Problem and Observation Log		1:1	
	Responsibilities Document		1:1	
	Maps and Phone Contacts			
	Problem/Resolution Chart		1:1	
	Polling Place I.D. List	1		
	Passwords List	1		

	Item	Quantity	Ratio	Notes
Miscellaneous Supplies	Daily Reports Envelope			
	Main Reports Envelope			
	Agenda	1		
	Name Tags			
	Glass cleaner and soft cloth	1		
	Canned air	1		
	Pens		1:1	
	Markers		1:5	
	Clipboard(s)	1		
	Screwdriver(s)		1:JBC	
	Laser Pointer	1		
	LCD projector	1		
	Presentation Screen	1		
	PowerPoint Slideshow(s)	1		
	Set up video/mpeg	1		
	How To Vote video/mpeg	1		
	Troubleshooter ID badges			Optional
	Security seals	1/JBC or eScan		
	SERVO application			For trainer – backup
	.eCM file and eCM Manager application			For trainer – backup

Document Layout on Tables



Physical Classroom Layout



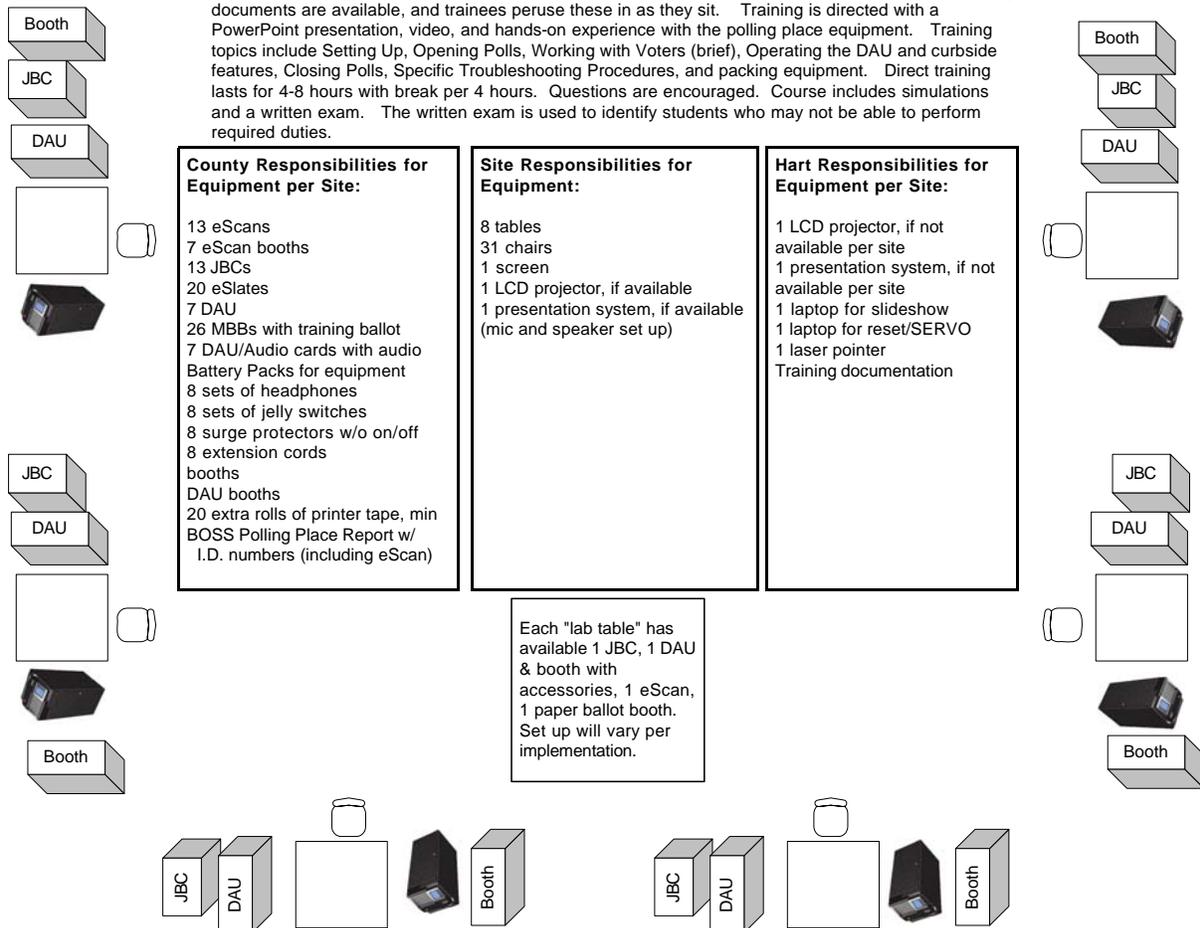
HART VOTING SYSTEM TROUBLESHOOTING PROCEDURES (eScan and eSlate)

Ideal Classroom Size: at least 30' x 60', or 1800 - 2000 square feet (this graphic not to scale)

- Trainers: 1
- Jurisdiction Personnel: 1, if applicable
- Trainees: Will vary, usually 20 - 25 max per class
- Time allotted per session: 4-8 hours. will vary
- Materials: See lists below

Process: Upon arrival trainees sign in and are told of expectations. Desk Reference and troubleshooting documents are available, and trainees peruse these in as they sit. Training is directed with a PowerPoint presentation, video, and hands-on experience with the polling place equipment. Training topics include Setting Up, Opening Polls, Working with Voters (brief), Operating the DAU and curbside features, Closing Polls, Specific Troubleshooting Procedures, and packing equipment. Direct training lasts for 4-8 hours with break per 4 hours. Questions are encouraged. Course includes simulations and a written exam. The written exam is used to identify students who may not be able to perform required duties.

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eScan™ Polling Place Operations

Course Training Agenda

Estimated Time: 2 hours (1-2 additional hours for optional absentee section, taught separately)

Audience: Polling Place eScan Operators (usually lead poll workers and alternate lead poll workers or the equivalent), Elections Officials, BOSS/Tally/Ballot Now Operators (optional)

Objectives: After completing this course, the trainee will successfully set up the eScan polling place components, run the eScan, instruct and assist voters, suspend (and reopen) or close the polls, and pack up the equipment.

Benefits of the eScan: The eScan is simple to operate with on-screen prompts, and it is easy to monitor. With the eScan, it is easy to process a voter's ballot. Voters quickly learn the system. Voters are reminded of their undervotes and overvotes, as per jurisdiction setup.



Manuals: eScan Desk Reference

Other Materials: eScan Desk Reference, Voter Instruction flyers and placards, Reconciliation Log, Mock voter qualification log, Simulation Checklist, Self-Assessment "Checkpoint", Training Evaluation form, PowerPoint slideshow(s)

Modules: 1-4 (Optional and additional section for absentee ballot processing using the eScan)

Prerequisite: Hands-on demonstration with the eScan. Trainees will use the system as if they are voters after they enter the classroom (as time allows).

Before-Class Responsibilities:

1. **Make certain room is tidy.**
2. **Make certain each lab station has poll book(s), logs and extra eScan report paper.**
3. **Lay out materials (Desk References on chairs, written reviews ready, evaluations ready, simulation checklist ready, sign-in sheet on clipboard...)**

NOTE: PowerPoint slideshows must be customized regarding Straight Party references, Adding Voters (e.g., precinct IDs), Primary Functionality, Logs, Open and Close Polls steps, and other jurisdictional differences as applicable. The same may be true of Desk References, Self-assessment "Checkpoint" instruments, and Simulation Exercises.



THE TRAINING BALLOT CONTENT AND LANGUAGES SHOULD SIMULATE THE UPCOMING ELECTION.

Refer to the Business Process Analysis and Stock Polling Place Predefine Configuration form before planning any Polling Place Operations presentation. Identify primary voting system for implementation – eScan or eSlate. This may influence the timing of the course.

As Trainees Arrive:

1. **How to Vote eSlate video running on the screen.**
2. **Trainees who arrive early enter classroom and vote on the eScan and eSlate. Trainer prints access codes and gives voter instructions, if time allows.**
3. **Trainees seat themselves in classroom area and sign in (pass sign-in sheet around on a clipboard).**

Teaching Points:

DR page

- **Getting Started** (*Timing: 10 minutes*)
 - ▶ Greet trainees, introduce yourself, and outline format, breaks, use of the “Parking Lot” for questions
 - ▶ Desk Reference overview (each activity is in the Desk Reference), Hart Voting System overview and security, benefits to trainees and course objectives
- **eScan System Operations**
- **Module 1: eScan Set-up and Opening Polls** (*Timing: 25 minutes*)
 - ▶ Step 1: Checking Supplies
 - ▶ Step 2: Planning the Polling Place Layout
 - ▶ Step 3: Setting up the eScan at the Polling Place
 - ❑ **Video Presentation:** eScan setup video
 - ❑ **Exercise 1.1:** Remove the eScan cover; Open the Ballot Box door; Remove the Emergency Ballot receptacle; Open and close the Emergency Ballot Slot
 - ✓ **Review Questions:** Where should the eScan be located in the polling place? Where is the emergency ballot slot? When would you use it?
 - ▶ eScan - Opening for Early Voting (day 1), or Election Day
 - ▷ Orientation to device
 - Explain/demonstrate how passwords are entered
 - ▷ Connect to AC power supply
 - ▷ eScan self-diagnostic
 - ▷ eScan start-up password (only if not predefined)
 - ▷ Polling Place ID (only if not predefined)
 - ▷ Printing the Zero Tape Report (Start here if you have predefined the Polling Place ID in the warehouse.)
 - ▷ Opening the Polls – Six-character passwords are mandatory
 - ❑ **Exercise 1.2:** Open the polls for an Early Voting session if that is the election type for which you are training. Open the polls for an Election Day session if that is the election type for which you are training. File reports and start the Reconciliation Log.
 - ✓ **Review Question:** Where do you put the Open Polls reports?

PPT Slide

- **Module 2: eScan Working With Voters** (*Timing: 15 minutes*)
NOTE: Discuss “qualifying” voters in a mock poll book and choosing correct precinct ballots.
- ▶ **Ballot Styles**
 - ▷ Identifying correct ballot style for a voter
 - Ballot Header indicates precinct number
- ▶ **Basic Voter Instructions eScan**
 - ▷ Receive a ballot for your precinct after signing in
 - ▷ Go to any open booth
 - ▷ Make ballot choices by filling in the box next to your selections with a black or blue pen
 - ▷ Slip the marked ballot into the provided privacy sleeve
 - ▷ Insert the voted ballot into the scanner and follow scanner screen directions to cast your ballot.
 - Video Presentation:** How to Vote, eScan video
 - Exercise 2.1:** Volunteer gives eScan ballot instructions.
 - ✓ **Review Question:** When and how would you give instructions?
- ▶ **Processing a Ballot**
NOTE: Ballot processing will be determined by eScan settings in BOSS. Review these, and set up training ballot to use identical settings.
 - ▷ Identifying ballot error messages (specific to local settings)
 - ▷ How voters use the **Next Contest** button, if applicable
 - ▷ How voters use the **Cast Ballot** button, if applicable (*emphasize that there is no Cast Ballot warning*)
 - ▷ How poll workers use the **Poll Worker** button
 - ▷ Review Troubleshooting ballot-related error codes (Desk Reference list)
 - Exercise 2.2:** Qualify a voter and select the correct ballot style.
 - Exercise 2.3:** Scan and process a marked ballot as if you are a voter. Process a write-in, if applicable. Respond to eScan screen prompts, including those as if you are a poll worker.
 - ▷ How to Help A Voter
 - Voter instruction messages
 - General Help Guidelines
 - Discussion Only:** Refer to Desk Reference.
 - ▷ Spoiling a ballot, and logging
 - Wrong ballot style, wrong language, voter wants to make changes, damaged ballot
 - Exercise 2.4:** As a group, role play a voter accidentally tearing a ballot and requesting a replacement ballot. Spoil and log, and file original ballot. Issue replacement ballot, mark, and cast.
 - ▷ Provisional ballot procedures (*follow legacy paper ballot procedures*)
 - Most customers will vote all provisionals on the DRE
 - ▷ Emergency ballot processing procedures (Emergency Ballot Slot)
 - Power outage, eScan (and eSlate) disabled
 - *Find out jurisdiction preference whether to use emergency paper ballots or to continue voting on the eSlate system alone.*
 - Exercise 2.5:** As a group, process a ballot in the Emergency Slot due to role play of complete polling place power outage (including eSlate battery).
 - ✓ **Review Question:** How do you help a voter?
 - ✓ **Review Questions:** What happens when you press the Poll Worker button? How do you spoil a ballot?

- **Module 3: eScan Closing the Polls** (*Timing: 20 minutes*)
 - ▶ Suspending the Polls for Early Voting – Six-character passwords are mandatory
 - ▶ Re-opening the Polls for Early Voting – Six-character passwords are mandatory
 - **Exercise 3.1:** Suspend the polls for Early Voting if you are participating in an Early Voting training event. Print and read the Polls Suspended Report. File reports and complete the Reconciliation Log. Re-open the polls for more Early Voting. Cast two more ballots. Suspend the polls. File reports and complete the Reconciliation Log.
 - ▶ Closing the Polls for Election Day – Six-character passwords are mandatory (OR)
 - **Exercise 3.2:** Close the polls for Election Day and print and read the eScan Tally Report (and/or Daily Detail report, depending on implementation), if you are participating in an Election Day training event.
 - ▷ Transporting MBBs and ballots
 - MBB transfer envelopes and ballot transfer case
 - **Exercise 3.4:** Complete eScan Self-Assessment “Checkpoint” as a group, at or near lab station, while instructor resets equipment.

BREAK – 15 minute break. (*Timing: 15 minutes*)

NOTE: Instructor resets ALL equipment (and MBBs) here. See steps on next page.

System Reset Procedure with SERVO:

In order to reset equipment, the instructor must have Hart InterCivic's SERVO application. The instructor must be a SERVO user with "Admin Reset" permissions. The instructor also needs cables for connecting the SERVO computer to the polling place equipment, a network crossover cable for the eScan, and a parallel cable for the eSlate system. These cables are included with the SERVO computer, which is usually a laptop.

1. Leave the MBB in the device (it will be reset to zero Cast Vote Records, making it reusable for another training event), and power on the device. **Make certain that all voting equipment is powered on. This may take up to 12-15 seconds.**
2. Audio Cards do not need to be removed from DAU eSlates in order to reset.
3. If using the eSlate system, up to 12 eSlates (booths) may be connected to the JBC in a daisy chain.
4. Select the SERVO shortcut on the PC desktop and log in to the SERVO application.
5. Go to the SERVO **Admin Tools** menu and click **Device Reset**.
6. Connect the cable from the SERVO PC to the JBC or eScan.



For JBCs, connect to the printer port. For eScans, connect to the network port. In the **Device Reset** window, select the radio button for the device type. Wait for the **Device Reset** window to confirm that the device has been reset (lower left corner of the window) and listen for the audible "ding."

7. Each device screen will display a message confirming that the reset is complete.
8. After resetting all equipment, proceed to predefine equipment, for the next training session, if applicable.
9. To predefine, duplicate warehouse steps that would be performed prior to sending out JBC and/or eScan equipment. (eSlates are NOT connected to the JBC for this process.) Unplug and restart the eScan or JBC, enter the Start-Up Password, Polling Place I.D. (____), select type of voting, confirm configuration, print Zero Tape, and unplug eScan or JBC.
10. Equipment is ready.



- **Troubleshooting:** Restart voting device, restart SERVO, and check network connections and settings. (PC Network settings must be compatible with eScan; Start/Settings/Network and Dial-up Connections/Local Area Connection/TCP/IP/Properties/Use the following address.) Disable and then enable the network connection. Run ipconfig command prompt. Retry.

Module 4: Simulation/Assessment and Pack Up (Timing: 50 minutes)

NOTE: All exercises in the simulation include “qualifying” voters in a mock poll book and choosing correct precincts/ballots.

- ▶ Simulated Polling Place Exercise (Timing: 30 minutes)
 - ▷ Rotate roles and run polling places using the System Desk Reference as a guide. Walk through:
 - Opening Polls – Six-character passwords are mandatory
 - Scanning Paper ballots (use write-in and straight party, if available)
 - Spoiling a paper ballot and logging
 - Powering off system and using the Emergency Ballot Slot
 - Powering on system and scanning ballots from Emergency Ballot Receptacle
 - Changing the device printer paper
 - Suspending and Re-opening the polls *OR* Closing the polls (six-character passwords mandatory)
 - **Exercise/Assessment 4.1:** Complete the simulation tasks.
- ▶ Self-Assessment “Checkpoint” (Timing: 10 minutes)
 - ▷ Give review in group setting.
 - ▷ INSTRUCTOR RESETS AND PREDEFINES EQUIPMENT DURING REVIEW.
 - **Exercise/Assessment 4.2:** Complete the Self-Assessment “Checkpoint”.
- ▶ Disconnecting and packing equipment (*after reset*) (Timing: 10 minutes)
 - **Exercise 4.3:** Power down and disconnect the equipment. Do not remove the DAU card or MBB. Assemble paperwork. Pack the equipment, as that will be part of your duties at the polling place. Review reference documents.

- **Closing** (*Timing: 5 minutes*)
 - ▶ Review eScan Self-Assessment “Checkpoint” answers (on screen)
 - ▶ Review eScan Desk Reference sections not yet specifically covered
 - ▷ Troubleshooting – Note: passwords required every time power is recycled.
 - ▷ Ensuring Polling Place Security
 - ▷ Secure access to the physical facility
 - ▷ Secure delivery procedures
 - ▷ Restricted access to voting devices
 - ▷ Secure booths and voting area
 - ▷ System Security
 - ▷ Guide to Serving Voters with Disabilities
 - ▷ FAQs
 - ▷ Glossary
 - ▶ Parking Lot Questions
 - ▶ Q&A
 - ▶ Evaluation forms (limited number – first, middle, and final names on the sign-in sheet)

After-class Responsibilities:

1. **File sign-in sheet in the envelope for pick-up.**
2. **File evaluations in the envelope for pick up.**
3. **Pick up trash and tidy up room.**
4. **Set out materials for the next class.**
5. **Make certain booths are secure.**
6. **Check paper in polling place equipment.**
7. **If you are the last class for the day, shut off all equipment.**

- **Section 2: eScan Absentee Operations** (Timing: 1-2 hours as a separate course)
 - NOTE:** This section is for those jurisdictions where the eScan is used to process absentee (by mail) ballots (e.g., a Service Bureau account without Ballot Now).
 - ▶ Ballot processing
 - ▷ Absentee/By-Mail ballots must be hand-sorted for voter intent issues, according to state voter intent codes. Ballots with intent issues must be pulled, reviewed by the ballot board, and duplicated. Duplicate process is recorded, and duplicate ballot is batched for scanning.
- **Module 1: Opening Polls for Absentee Voting**
 - ▶ Plug device in, power on and insert MBB (seal MBB door, if applicable)
 - ▶ Enter **Start-Up Password**
 - ▶ Enter the Polling Place ID from the BOSS GUI (Ballot Now polling place ID in the Polling Places tab of BOSS. If a BOSS polling places report is available, the eScan/Ballot Now absentee polling place ID is the last polling place ID number +1).
 - ▶ From **Print Zero Tape** screen, press the **Poll Worker Button** in order to change scanner settings to accept all ballots.
 - ▷ Enter the Administrator Password.
 - ▷ From the **Administrator Menu** screen change scan settings in order to process absentee (by mail) ballots.
 - Select **Scan Settings**
 - Select **Change Settings** until “Accept all ballots” is displayed as the current setting
 - Select **Exit**
 - Select **Exit** again in order to exit the **Administrator Menu** screen
 - ▶ Print the “Zero Tape Report”
 - ▷ Select **Print Zero**
 - ▷ Enter Public Count into the appropriate reconciliation log
 - ▶ Complete Open Polls process
 - ▷ Select **Open Polls**
 - ▷ Enter the Poll Worker Password
 - File eScan reports
 - ▷ eScan is ready to scan ballots
 - **Exercise 1.1:** Open polls for absentee voting. Complete logs and file reports.
- **Module 2: Scanning Absentee Ballots**
 - ▶ After processing ballots, and duplicating ballots with intent issues, according to state and local guidelines, scan by-mail ballots, one at a time.
 - **Exercise 2.1:** Scan absentee ballots, after processing and duplicating.
- **Module 3: Suspending Polls for Absentee Voting**
 - ▶ From the **Ready to Scan** screen, press the **Poll Worker Button**
 - ▶ Enter the Poll Worker Password
 - ▶ Select **Suspend**
 - ▶ Select **Yes**
 - ▶ Enter the Suspend Polls Password
 - ▶ Complete reconciliation log and file reports
 - ▶ Shut off power
 - ▶ If this is the last day of eScan absentee ballot processing, follow local procedures to pack equipment and process MBB(s).
 - **Exercise 3.1:** Suspend polls for absentee voting. Complete logs and file reports. Final suspend – process MBB.

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- **Module 4: Re-Opening Polls for Absentee Voting**
 - ▶ Plug device in and power on.
 - ▶ From the **Authentication Menu** screen, enter the Poll Worker Password and select **Accept**
 - ▶ Complete the reconciliation log and file reports in the appropriate envelope
 - ▶ eScan is ready to scan ballots
 - ❑ **Exercise 4.1:** Re-open polls for absentee voting. Proceed to scan ballots, suspend polls, and prepare MBB(s) for processing.

- **Closing for Absentee Section**
 - ▶ Review eScan Desk Reference sections not yet specifically covered
 - ▷ Troubleshooting – Note: passwords required every time power is recycled.
 - ▷ Ensuring Polling Place Security
 - ▷ Secure access to the physical facility
 - ▷ Secure delivery procedures
 - ▷ Restricted access to voting devices
 - ▷ Secure booths and voting area
 - ▷ System Security
 - ▷ Guide to Serving Voters with Disabilities
 - ▷ FAQs
 - ▷ Glossary
 - ▶ Parking Lot Questions
 - ▶ Q&A
 - ▶ Evaluation forms (limited number – first, middle, and final names on the sign-in sheet)

	Item	Quantity	Ratio	Notes
Absentee Section Supplies	Ballot Now/eScan polling place ID			BOSS polling place ID list
	Marked ballots		50	With overs, unders, and blanks,
	Torn or mismarked ballots		4	For Duplication
	Reconciliation log	2		
	Daily Reports Envelopes	2		
	Main Envelopes	1		
	Replacement Ballot Envelope and Log	1		
	MBB Transfer Envelopes		2:station	
	Agenda	1		
	Security seals	1		
	eScan Ballot Box compartment keys	1 set		

Equipment List

	Item	Quantity	Ratio	Notes
Hardware	Power strip(s)/Surge protector(s)			
	Extension Cords			
	eScan(s)		1:1 – 4 trainees	JBCs must be programmed in advance with training signing key
	eScan printer paper rolls			
	eScan booths			
	MBB(s) with relevant ballots/Labels			
	Reset Cable	1		
	SERVO/Reset Computer	1		
	Presentation Computer			
	Presentation System (speakers)			
	LCD Projector			
	PC speakers (if no presentation system)			

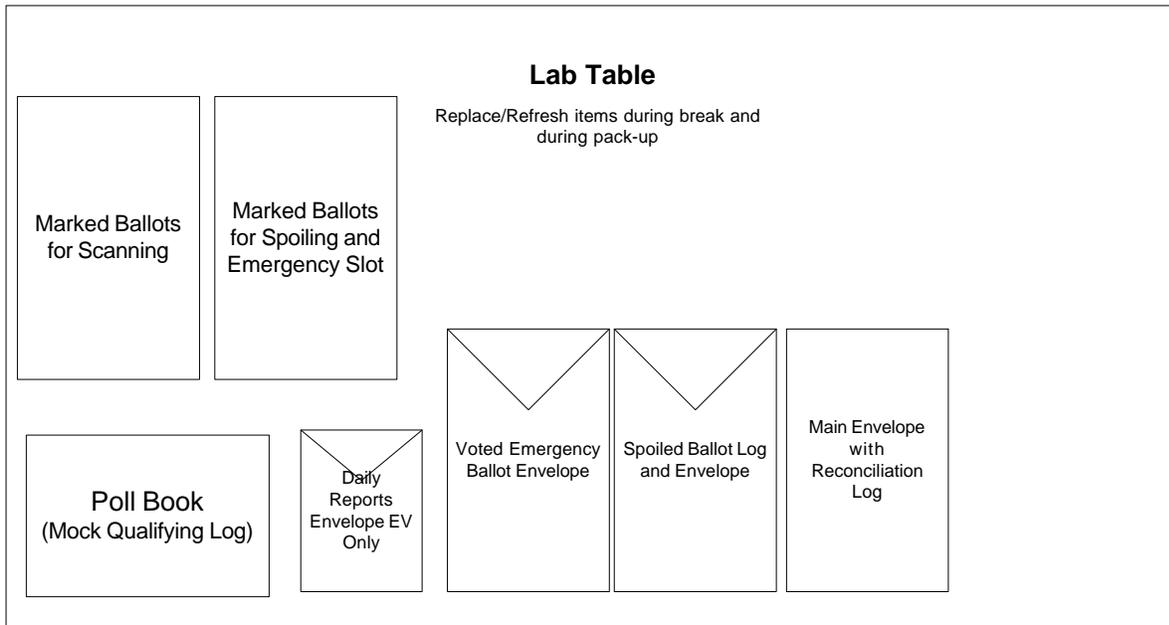
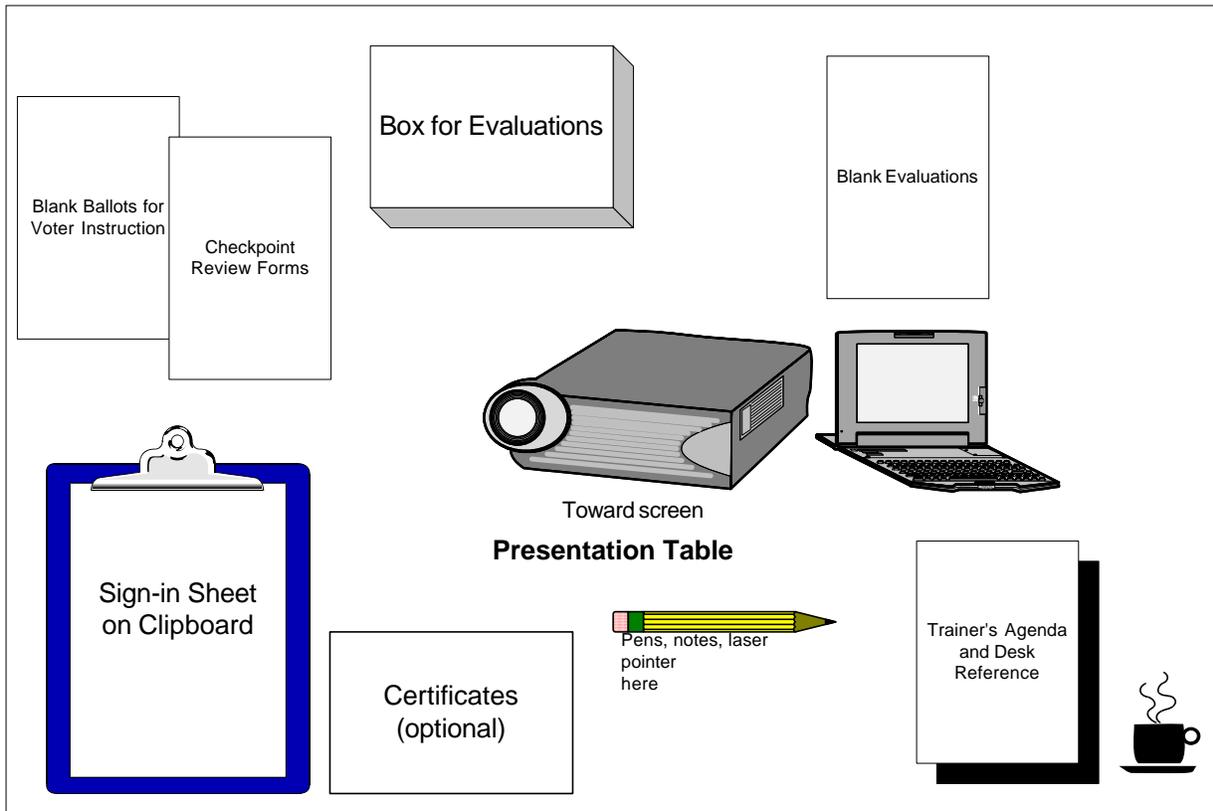
	Item	Quantity	Ratio	Notes
Miscellaneous Supplies	Marked ballots for scanning		12:station	With overvotes, undervotes, and blanks; these can be reused
	Mismarked ballots for spoiling and ballots for Emergency Slot		2:station	
	Daily Reports Envelope			
	Main Envelope			
	Spoiled Ballots Envelope			
	Voted Emergency Ballots Envelope			
	Agenda			
	Glass cleaner and soft cloth	1		
	Pens		1:1	
	Markers			
	Clipboard(s)	1		
	Screwdriver(s)	1		
	Laser Pointer	1		
	Presentation Screen	1		
	PowerPoint Slideshow(s)	1		
	Set up video/mpeg			
	Tape			
	eScan Ballot Box compartment keys			
eScan security seals	1/JBC			

	Item	Quantity	Ratio	Notes
Documentation	eScan Polling Place System DR		1:1	
	Voter Instructions flyers		samples	
	Voter Instructions Placards		1/booth	
	eScan Ops written review		1:1	Optional
	Polling Place ID list			
	Password list			
	Simulation Checklist		1:1	
	Self-Assessment "Checkpoint"		1:1	
	Mock Qualifying Station Log	1		
	Reconciliation Log		2:JBC: session	
	Spoiled Ballot Log and Envelope		2:JBC: session	
	Training Evaluation forms		3:class	
	Sign-in Sheet		1:class	
	Certificates		1:1	Optional

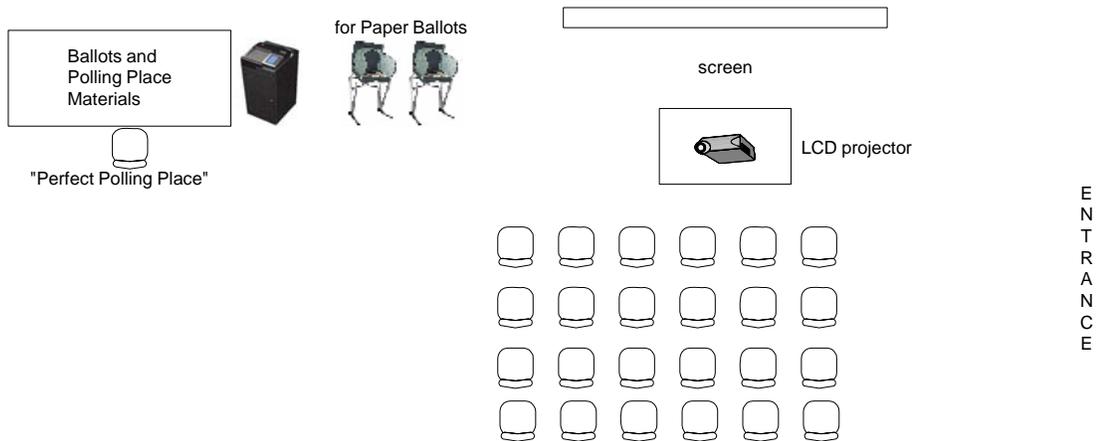
Document Use for Polling Place Operations Training

At Central Table	Hand out to Trainees	At the eScan
Sign-in sheet	eScan Desk Reference (on chairs)	Reconciliation Log
	Simulation Checklist	Main and Daily (EV only) Reports Envelopes w/ logs (Cancelled Booth Log)
	Training Evaluation (2-3 per class)	Mock qualifying log (poll book)
	Self-Assessment "Checkpoint"	Spoiled Ballot Log and Envelope

Document Layout on Tables



Physical Classroom Layout



eSCAN POLLING PLACE OPERATIONS

Ideal Classroom Size: at least 30' x 60', or 1800-plus square feet (this graphic not to scale)

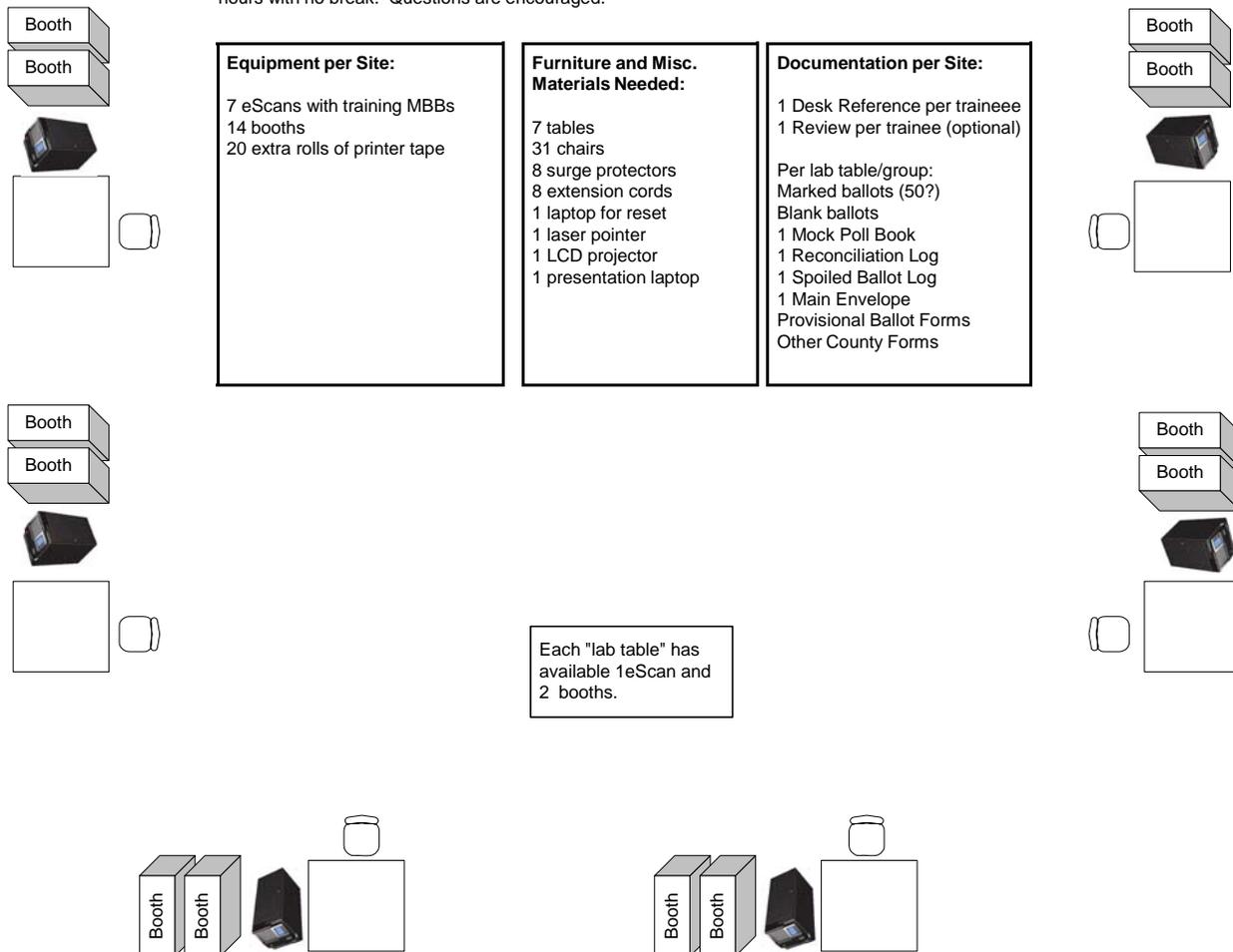
Trainers: 1

Jurisdiction Personnel: 1

Trainees: Will vary, ideally no more than 4 trainees per station (24 per session with 6 stations).

Time allotted per session: 2 hours (schedule classes every 2.5 hours)

Process: Upon arrival trainees sign in. Desk Reference documents are handed out. Training is directed at the "Perfect Polling Place". Trainees participate in hands-on activities. Direct training lasts for 2 hours with no break. Questions are encouraged.



Notes:

Hart Voting System

Polling Place Operations

Course Training Agenda

Estimated Time: 4 hours (1-2 additional hours for separate absentee section)

Audience: Polling Place eScan and Judge's Booth Controller (JBC) Operators (usually lead poll workers and alternate lead poll workers or the equivalent), Elections Officials, BOSS/Tally/Ballot Now Operators (optional)

Objectives: After completing this course, the trainee will successfully set up both the eScan and eSlate Electronic Voting System polling place components, run the eScan and Judge's Booth Controller, instruct and assist voters, suspend (and reopen) or close the polls, and pack up the equipment.

Benefits of the system: The eScan, eSlate and JBC are lightweight, simple to operate with on-screen prompts, and easy to monitor. With the JBC, it is easy to get the voter's correct ballot style/precinct (or party affiliation, if applicable). With the eScan, it is easy to process a voter's ballot. Voters quickly learn the eScan and eSlate. On the eSlate, there is no way a voter can overvote, voters are reminded of their undervotes, and voters with disabilities have equal and private access to voting.

Manuals: Hart Voting System Polling Place Operations Desk Reference

Other Materials: Voter Instruction flyers and placards, Flag placards, Voter Instructions Script, Reconciliation Log, Mock voter qualification log, Self-Assessment "Checkpoint" for both eSlate and eScan systems, Training Evaluation form, How to Vote video/.mpg and PowerPoint slideshow(s)

Sections: 3 (Optional and additional section for absentee ballot processing using the eScan)

Prerequisite: Hands-on demonstration with the eSlate and eScan. Trainees will use the systems as if they are voters after they enter the classroom (as time allows).

Before-Class Responsibilities:

1. **Make certain room is tidy.**
2. **Make certain each lab station has poll book(s), logs and extra printer paper.**
3. **Lay out materials (Desk References on chairs, written reviews ready, evaluations ready, simulation checklist ready, sign-in sheet on clipboard)**

NOTE: PowerPoint slideshows must be customized regarding Straight Party references, Adding Voters (e.g., precinct IDs), Primary Functionality, Logs, Open and Close Polls steps, and other jurisdictional differences as applicable. The same may be true of Desk References, Self-assessment "Checkpoint" instruments, and Simulation Exercises.

THE TRAINING BALLOT CONTENT AND LANGUAGES SHOULD SIMULATE THE UPCOMING ELECTION.

Refer to the Business Process Analysis and Stock Polling Place Predefine Configuration form before planning any Polling Place Operations presentation. Identify primary voting system for implementation – eScan or eSlate. This may influence the timing of the course.



As Trainees Arrive:

1. **How to Vote video running on the screen, as applicable.**
2. **Trainees who arrive early enter classroom and vote on the eScan and eSlate. Trainer prints Access Codes and gives voter instructions and ballots, if time allows.**
3. **Trainees seat themselves in classroom area and pass sign-in sheet around on a clipboard.**

Teaching Points:

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- **Getting Started (Timing: 5 minutes)**
 - ▶ Greet trainees, introduce yourself, and outline format, breaks, use of the “Parking Lot” for questions
 - ▶ Desk Reference overview (each activity is in the Desk Reference), Hart Voting System overview and security, benefits to trainees and course objectives
- **Section 1: eSlate System Operations**
- **Module 1.1: eSlate Setting Up (Timing: 10 min. if video only, 30 min. w/ exercise)**

NOTE: Number of booths per lab station is dependent on implementation.

 - ▶ Step 1: Checking Supplies
 - ▶ Step 2: Planning the Polling Place Layout
 - ▶ Step 3: Setting up the JBC
 - ▶ Step 4: Setting up the eSlates and DAU eSlates
 - ❑ **Video Presentation:** eSlate set up video – **IF VIDEO-ONLY MAKE CERTAIN THAT BOOTHS AND JBCs ARE SET UP AT STATIONS.**
 - ❑ **Exercise 1.1.1: (SKIP IF VIDEO-ONLY)** Set up eSlate components, including one JBC and at least one DAU. Set up the DAU last in the daisy chain, if using more than one eSlate. Also, set up the DAU with a battery pack, if available.
 - ✓ **Review Question:** What is special about setting up the DAU eSlate?
- **Module 1.2: eSlate Opening the Polls (Timing: 15 minutes)**
 - ▶ JBC - Opening for Early Voting (day 1), or Election Day
 - ▷ Orientation to device
 - ▷ Connect battery power sources, then AC power supply
 - ▷ JBC self-diagnostic
 - ▷ JBC start-up password (only if not predefined)
 - ▷ eSlate button test (only if not predefined)
 - ▷ Polling Place ID (only if not predefined)
 - ▷ Booth Numbers
 - ▷ Printing the Zero Tape Report (Start here if you have predefined the Polling Place ID in the warehouse.)
 - ▷ Opening the Polls – Six-character passwords are mandatory
 - ❑ **Exercise 1.2.1:** Open the polls for an Early Voting session if that is the election type for which you are training. Open the polls for an Election Day session if that is the election type for which you are training. File reports and start the Reconciliation Log.
 - ✓ **Review Question(s):** A voter walks into the polling place. Put the steps s/he goes through before getting to the voting booth in order: Listen to Voter Instructions, Qualify, Receive access code, Go to any open booth. How can you tell that the eSlate is on battery power? JBC? Where do you put the Open Polls reports?

PPT Slide

- **Module 1.3: eSlate Working With Voters** (Timing: 30 minutes)
 - NOTE:** Discuss “qualifying” voters in a mock poll book and choosing correct precincts on the JBC.
 - ▶ **Ballot Styles**
 - ▷ Importance of identifying correct ballot style for a voter
 - Access Code and ballot header include precinct number (style), as applicable
 - ▶ **Voter Instructions**
 - ▷ Review available materials, including flyers, in-booth placards, poll worker script, running video
 - ▶ **General Voter Instructions DAU eSlate – prepare trainees for hands-on voting**
 - ▷ Receive an access code for your precinct after signing in
 - ▷ Go to any open booth
 - ▷ Select language, if option available
 - ▷ Enter your access code, or have an assistant enter the access code.
 - ▷ Navigate the highlight bar to see or hear selections on the ballot, and enter the selections. Do this for each contest.
 - ▷ Read or listen to the **BALLOT SUMMARY** carefully, or review the ballot by returning to the first page.
 - ▷ Only after all of your desired choices have been made, press **CAST BALLOT**.
 - ▷ Verify paper ballot and press **CAST BALLOT** until you see the waving American flag (if VBO enabled).
 - Video Presentation:** How to Vote, eSlate video (optional)
 - Demonstration Only:** Instructor gives voter instructions to the group.
 - ✓ **Review Question:** When and how would you give voter instructions?
 - ▶ **Adding Voters**
 - ▷ With a VR interface, if applicable (precinct IDs must match!)
 - ▷ From the JBC (practice choosing specific precinct(s), if applicable)
 - ▷ For a primary (if applicable, also practice choosing specific party affiliation from the JBC)
 - ▷ From the JBC (also show printer disabled)
 - Exercise 1.3.1:** Add a voter. Vote and cast a ballot on an eSlate. Use the “Other Features for Votes” page of the Desk Reference as a reference to try eSlate ballot features. Vote a write-in, if applicable. Note Access Code on JBC screen AND verify voter’s precinct on access code slip. Try the headphones on the DAU unit.
 - Demonstration Only:** Trainer demonstrates use of Tactile Input Switches, if applicable and available at the polling places.
 - ✓ **Review Question:** How do you select the voter’s precinct on the JBC?
 - Exercise 1.3.2:** Go to an eSlate. Gain access to a ballot with an active access code. Use the **HELP** button, and note the JBC display. Refer to the Desk Reference. Vote and cast a ballot.
 - ✓ **Review Question(s):** At the polling place, which of the documents will assist voters? Which will assist YOU? What happens when a voter presses help once? Twice?

- **Module 1.3: eSlate Working With Voters** (*continued*)
 - ▶ Adding a Provisional Voter
 - ☐ **Exercise 1.3.3:** Add a Provisional Voter to your voting event, if applicable in your state. Vote and cast a ballot as the Provisional Voter. Note Access Code and Retrieval Code on JBC screen.
 - ▶ Checking an Access Code
 - ☐ **Exercise 1.3.4:** Use the JBC to “Check Code”. Check code numbers you pick at random, your last assigned access code, and an access code that is still in use.
 - ☐ **Exercise 1.3.5:** Print a new “Extra” access code, check it, and file it in the appropriate envelope, noting the reason on the access code.
 - ▶ Printing an “Access Code Report” (*optional* per implementation)
 - ☐ **Exercise 1.3.6:** Print an “Access Code Report”.
 - ▶ Canceling a booth
 - ☐ **Exercise 1.3.7:** Add a voter, then start voting with that code, but do not cast the ballot. On the JBC, cancel that booth. Record the cancellation in the Canceled Booth Log.
 - ✓ **Review Question:** At the polling place, which of the aides will help you remember the steps and procedures for running the JBC?
 - ▶ Working with Voters with Disabilities
 - ▷ Adopt a service approach – ask, don’t assume
 - ▷ Slow down when working with Persons with Disabilities
 - ▷ Take time to escort person to booth and orient to device
 - ▶ Curbside Voting
 - ☐ **Demonstration Only:** Observe the instructor showing curbside voting feature.
 - NOTE:** *Instructor, emphasize entering Access Code BEFORE disconnecting DAU eSlate.*
 - ✓ **Review Question:** What must be done first in order to take the curbside device out to a voter?
- **Module 1.4: eSlate Closing the Polls** (*Timing: 15 minutes*)
 - ▶ Suspending the Polls for Early Voting – Six-character passwords are mandatory
 - ▶ Re-opening the Polls for Early Voting – Six-character passwords are mandatory
 - ▶ Closing the Polls for Election Day – Six-character passwords are mandatory
 - ▶ Disconnecting power
 - ☐ **Exercise 1.4.1:** Suspend the polls for Early Voting if you are participating in an Early Voting training event. Print and read the Polls Suspended Report. File reports and complete the Reconciliation Log. Re-open the polls for more Early Voting. Cast two more ballots. Suspend the polls. File reports and complete the Reconciliation Log.
 - (OR) ☐ **Exercise 1.4.1B:** Close the polls for Election Day and print and read the JBC Tally Report (and/or Daily Detail report, depending on implementation), if you are participating in an Election Day training event. File reports and complete the JBC section of the Reconciliation Log.
 - ☐ **Exercise 1.4.2:** Complete eSlate Self-Assessment “Checkpoint” as a group, at or near lab station, while instructor resets equipment.
 - ✓ **Review Question:** At the end of the day (Election Day or the last day of Early Voting), what items go to the Counting Station?

NOTE: DO NOT reset or pack eSlate equipment at this time.

BREAK – 5 minute break. (*Timing: 5 minutes*)

- **Section 2: eScan System Operations**
 - **Module 2.1: eScan Set-up and Opening Polls** (*Timing: 15 minutes*)
 - ▶ Step 1: Checking Supplies
 - ▶ Step 2: Planning the Polling Place Layout
 - ▶ Step 3: Setting up the eScan at the Polling Place
 - ▶ Step 4: Opening for Early Voting (day 1), or Election Day
 - ▷ Orientation to device
 - Explain/demonstrate how passwords are entered
 - ▷ Connect to AC power supply
 - ▷ eScan self-diagnostic
 - ▷ eScan start-up password (only if not predefined)
 - ▷ Polling Place ID (only if not predefined)
 - ▷ Printing the Zero Tape Report (Start here if you have predefined the Polling Place ID in the warehouse.)
 - ▷ Opening the Polls – Six-character passwords are mandatory
 - Video Presentation:** eScan set up and open polls video
 - Exercise 2.1.1:** Remove the eScan cover and open the polls for an Early Voting session if that is the election type for which you are training. Open the polls for an Election Day session if that is the election type for which you are training. File reports and start the Reconciliation Log.
 - ✓ **Review Question:** Where do you put the Open Polls reports?
- **Module 2.2: eScan Working With Voters** (*Timing: 30 minutes*)

NOTE: Discuss “qualifying” voters in a mock poll book and choosing correct precinct ballots.

 - ▶ Ballot Styles
 - ▷ Identifying correct ballot style for a voter
 - Ballot Header indicates precinct number
 - ▶ Basic Voter Instructions eScan - prepare trainees for hands-on voting
 - ▷ Receive a ballot for your precinct after signing in
 - ▷ Go to any open booth
 - ▷ Make ballot choices by filling in the box next to your selections with a black or blue pen
 - ▷ Slip the marked ballot into the provided privacy sleeve
 - ▷ Insert the voted ballot into the scanner and follow scanner screen directions to cast your ballot.
 - Video Presentation:** How to Vote, eScan video (optional)
 - Demonstration Only:** Instructor gives voter instructions to the group.
 - ✓ **Review Question:** When and how would you give voter instructions?

- **Module 2.2: eScan Working With Voters** (*continued*)
 - ▶ Processing a Ballot
 - NOTE:** *Ballot processing will be determined by eScan settings in BOSS. Review these, and set up training ballot to use identical settings.*
 - ▷ Insert ballot into ballot feed slot, using privacy sleeve (ballot in any orientation)
 - ▷ Identifying ballot error messages (specific to local settings)
 - ▷ How voters use the “Next Contest” button, if applicable
 - ▷ How poll workers use the Poll Worker override button
 - ▷ Review Troubleshooting ballot-related error codes (Desk Reference list)
 - **Exercise 2.2.1:** Qualify a voter and select the correct ballot style. Scan and process a marked ballot as if you are a voter. Process a write-in, if applicable. Respond to eScan screen prompts, including those as if you are a poll worker.
 - ▷ Spoiling a ballot, and logging
 - Wrong ballot style, wrong language, voter wants to make changes, damaged ballot
 - **Exercise 2.2.2:** As a group, role play a voter accidentally tearing a ballot and requesting a replacement ballot. Spoil and log, and file original ballot. Issue replacement ballot, mark, and cast.
 - ▷ Provisional ballot procedures (*follow legacy paper ballot procedures*)
 - Many customers will vote all provisionals on the DRE
 - ▷ Emergency ballot processing procedures (Emergency Ballot Slot)
 - Power outage, eScan (and eSlate) disabled
 - *Ascertain jurisdiction preference whether to use emergency paper ballots or to continue voting on the eSlate system alone.*
 - **Exercise 2.2.3:** As a group, process a ballot in the Emergency Slot due to role play of complete polling place power outage (including eSlate battery).
 - ✓ **Review Question:** How do you help a voter?
 - ✓ **Review Questions:** What happens when you press the Poll Worker button? How do you spoil a ballot?
- ▶ **Module 2.3: eScan Closing the Polls** (*Timing: 20 minutes*)
 - ▶ Suspending the Polls for Early Voting – Six-character passwords are mandatory
 - ▶ Re-opening the Polls for Early Voting – Six-character passwords are mandatory
 - **Exercise 2.3.1:** Suspend the polls for Early Voting if you are participating in an Early Voting training event. Print and read the Polls Suspended Report. File reports and complete the Reconciliation Log. Re-open the polls for more Early Voting. Cast two more ballots. Suspend the polls. File reports and complete the Reconciliation Log.
 - ▶ (OR) Closing the Polls for Election Day – Six-character passwords are mandatory
 - ▷ Tally Reports and Ballot Transfer
 - **Exercise 2.3.2:** Close the polls for Election Day and print and read the eScan Tally Report (and/or Daily Detail report, depending on implementation), if you are participating in an Election Day training event.
 - **Exercise 2.3.3:** Remove the JBC MBB and consolidate MBB data and print the consolidated Tally Report from the eScan, if applicable. Complete the Reconciliation Log and file reports. Place MBBs and seals in appropriate transfer envelopes. Place ballots in transfer case.

BREAK – 15 minute break. (Timing: 15 minutes)

NOTE: Instructor resets ALL equipment (and MBBs) and predefines here.

System Reset Procedure with SERVO:

In order to reset equipment, the instructor must have Hart InterCivic's SERVO application. The instructor must be a SERVO user with "Admin Reset" permissions. The instructor also needs cables for connecting the SERVO computer to the polling place equipment, a network crossover cable for the eScan, and a parallel cable for the eSlate system. These cables are included with the SERVO computer, which is usually a laptop.

1. Leave the MBB in the device (it will be reset to zero Cast Vote Records, making it reusable for another training event), and power on the device. **Make certain that all voting equipment is powered on. This may take up to 12-15 seconds.**
2. Audio Cards do not need to be removed from DAU eSlates in order to reset.
3. If using the eSlate system, up to 12 eSlates (booths) may be connected to the JBC in a daisy chain.
4. Select the SERVO shortcut on the PC desktop and log in to the SERVO application.
5. Go to the SERVO **Admin Tools** menu and click **Device Reset**.
6. Connect the cable from the SERVO PC to the JBC or eScan.



For JBCs, connect to the printer port. For eScans, connect to the network port. In the **Device Reset** window, select the radio button for the device type. Wait for the **Device Reset** window to confirm that the device has been reset (lower left corner of the window) and listen for the audible "ding."

7. Each device screen will display a message confirming that the reset is complete.
8. After resetting all equipment, proceed to predefine equipment, for the next training session, if applicable.
9. To predefine, duplicate warehouse steps that would be performed prior to sending out JBC and/or eScan equipment. (eSlates are NOT connected to the JBC for this process.) Unplug and restart the eScan or JBC, enter the Start-Up Password, Polling Place I.D. (____), select type of voting, confirm configuration, print Zero Tape, and unplug eScan or JBC.
10. Equipment is ready.



- **Troubleshooting:** Restart voting device, restart SERVO, and check network connections and settings. (PC Network settings must be compatible with eScan; Start/Settings/Network and Dial-up Connections/Local Area Connection/TCP/IP/Properties/Use the following address.) Disable and then enable the network connection. Run ipconfig command prompt. Retry.

- **Section 3: Simulation/Assessment and Pack Up**
NOTE: All exercises in the simulation include “qualifying” voters in a mock poll book and choosing correct precincts/ballots.
- **Module 3.1: Simulated Polling Place Exercise** (Timing: 30 minutes)
 - ▶ Rotate roles and run polling places using the System Desk Reference as a guide.
Walk through:
 - ▷ Opening Polls – Six-character passwords are mandatory
 - ▷ Adding Voters from the JBC and casting ballots (use write-in and straight party, if available)
 - ▷ Using the DAU eSlate with headphones
 - ▷ Scanning Paper ballots (use write-in and straight party, if available)
 - ▷ Voting provisional ballots on the eSlate, as applicable
 - ▷ Canceling an eSlate booth
 - ▷ Spoiling a paper ballot
 - ▷ Changing the device printer paper
 - ▷ Suspending and Re-opening the polls OR Closing the polls (six-character passwords mandatory)
 - **Exercise/Assessment 3.1.1:** Complete the simulation tasks.
- **Module 3.2: Self-Assessment “Checkpoint”** (Timing: 10 minutes)
 - ▷ Give review in group setting.
 - ▷ INSTRUCTOR RESETS (AND PREDEFINES) EQUIPMENT DURING REVIEW.
 - **Exercise/Assessment 3.2.1:** Complete the Self-Assessment “Checkpoint”.
- **Module 3.3: Disconnecting and packing equipment** (after reset) (Timing: 10 minutes)
 - **Exercise 3.3.1:** Power down and disconnect the equipment. Do not remove the DAU card or MBB. Assemble paperwork. Pack the equipment, as that will be part of your duties at the polling place. Review reference documents.

- **Closing** (*Timing: 10 minutes*)
 - ▶ Review Self-Assessment “Checkpoint” answers (on screen)
 - ▶ Reminder: Voter Instructions
 - ▷ eSlate – use your own words, with the script as a guide... keep it simple
 - Language, if applicable
 - Access Code
 - Navigate and mark ballot
 - Review Summary Page
 - ▷ eScan - use your own words, with the script as a guide... keep it simple
 - Fill box and write-in, if applicable
 - ▶ Reminder: Guide to Serving Voters with Disabilities
 - Adopt a service approach – ask, don’t assume
 - Slow down when working with Persons with Disabilities
 - Take time to escort person to booth and orient to device
 - ▶ Review Desk Reference sections not yet specifically covered
 - ▷ Troubleshooting – Note: passwords required every time power is recycled.
 - ▷ Ensuring Polling Place Security
 - ▷ Secure access to the physical facility
 - ▷ Secure delivery procedures
 - ▷ Restricted access to voting devices
 - ▷ Secure booths and voting area
 - ▷ System Security
 - ▷ FAQs
 - ▷ Glossary
 - ▶ Parking Lot Questions
 - ▶ Q&A
 - ▶ Evaluation forms (limited number – first, middle, and final names on the sign-in sheet)

After-class Responsibilities:

1. **File sign-in sheet in the envelope for pick-up.**
2. **File evaluations in the envelope for pick up.**
3. **Pick up trash and tidy up room.**
4. **Set out materials for the next class.**
5. **Make certain booths are secure.**
6. **Check paper in perfect polling place equipment.**
7. **If you are the last class for the day, shut off all equipment.**

- **Section 4: eScan Absentee Operations** (*Timing: 1-2 hours as a separate course*)
 - NOTE:** *This section is for those jurisdictions where the eScan is used to process absentee (by mail) ballots (e.g., a Service Bureau account without Ballot Now).*
 - ▶ Ballot processing
 - ▷ Absentee/By-Mail ballots must be hand-sorted for voter intent issues, according to state voter intent codes. Ballots with intent issues must be pulled, reviewed by the ballot board, and duplicated. Duplicate process is recorded, and duplicate ballot is batched for scanning.
- **Module 4.1: Opening Polls for Absentee Voting**
 - ▶ Plug device in, power on and insert MBB (seal MBB door, if applicable)
 - ▶ Enter **Start-Up Password**
 - ▶ Enter the Polling Place ID from the BOSS GUI (Ballot Now polling place ID in the Polling Places tab of BOSS. If a BOSS polling places report is available, the eScan/Ballot Now absentee polling place ID is the last polling place ID number +1).
 - ▶ From **Print Zero Tape** screen, press the **Poll Worker Button** in order to change scanner settings
 - ▷ Enter the Administrator Password.
 - ▷ From the Administrator Menu screen, change scan settings in order to process absentee (by mail) ballots.
 - Select **Scan Settings**
 - Select **Change Settings:** either “Accept all ballots” or “Scan with default restrictions”
 - *Accept all ballots* will generate no instruction messages for mismarked contests.
 - *Scan with default restrictions* is appropriate if a ballot board will be present for absentee scanning; as ballots are scanned, any ballots that require review will be rejected and they may be pulled out to examine voter intent.
 - Select **Exit**
 - Select **Exit** again in order to exit the **Administrator Menu** screen
 - ▶ Print the “Zero Tape Report”
 - ▷ Select **Print Zero**
 - ▷ Enter Public Count into the appropriate reconciliation log
 - ▶ Complete Open Polls process
 - ▷ Select **Open Polls**
 - ▷ Enter the Poll Worker Password
 - File eScan reports
 - ▷ eScan is ready to scan ballots
 - **Exercise 4.1.1:** Open polls for absentee voting. Complete logs and file reports.
- **Module 4.2: Scanning Absentee Ballots**
 - ▶ Prior to scanning, ballots may be sorted into batches with various voter intent issues, in accordance with state and local guidelines.
 - ▶ eScan may be set to “accept all ballots” or “scan with default restrictions.”
 - *Accept all ballots* will generate no instruction messages for mismarked contests.
 - *Scan with default restrictions* is appropriate if a ballot board will be present for absentee scanning; as ballots are scanned, any ballots that require review will be rejected and they may be pulled out to examine voter intent.

- After review, the voter's intent may be duplicated on a replacement ballot to be scanned anew, according to state and local guidelines; alternatively, to confirm eScan's analysis of mismarks, re-scan the original improperly marked ballot and accept it as-is by pressing the Poll Worker Button.

□ **Exercise 4.2.1:** Scan absentee ballots, after processing and duplicating.

➤ **Module 4.3: Suspending Polls for Absentee Voting**

- ▶ From the **Ready to Scan** screen, press the **Poll Worker Button**
- ▶ Enter the Poll Worker Password
- ▶ Select **Suspend**
- ▶ Select **Yes**
- ▶ Enter the Suspend Polls Password
- ▶ Complete reconciliation log and file reports
- ▶ Shut off power
- ▶ If this is the last day of eScan absentee ballot processing, follow local procedures to pack equipment and process MBB(s).
 - **Exercise 4.3.1:** Suspend polls for absentee voting. Complete logs and file reports. Final suspend – process MBB.



➤ **Module 4.4: Re-Opening Polls for Absentee Voting**

- ▶ Plug device in and power on.
- ▶ From the **Authentication Menu** screen, enter the Poll Worker Password and select **Accept**
- ▶ Complete the reconciliation log and file reports in the appropriate envelope
- ▶ eScan is ready to scan ballots
 - **Exercise 4.4.1:** Re-open polls for absentee voting. Proceed to scan ballots, suspend polls, and prepare MBB(s) for processing.

➤ **Closing for Absentee Section**

- ▶ Review eScan Desk Reference sections not yet specifically covered
 - ▷ Troubleshooting – Note: passwords required every time power is recycled.
 - ▷ Ensuring Polling Place Security
 - ▷ Secure access to the physical facility
 - ▷ Secure delivery procedures
 - ▷ Restricted access to voting devices
 - ▷ Secure booths and voting area
 - ▷ System Security
 - ▷ Guide to Serving Voters with Disabilities
 - ▷ FAQs
 - ▷ Glossary
- ▶ Parking Lot Questions
- ▶ Q&A
- ▶ Evaluation forms (limited number – first, middle, and final names on the sign-in sheet)

	Item	Quantity	Ratio	Notes
Absentee Section Supplies	Ballot Now/eScan polling place ID			BOSS polling place ID list
	Marked ballots		50	With overs, unders, and blanks,
	Torn or mismarked ballots		4	For Duplication
	Reconciliation log	2		
	Daily Reports Envelopes	2		
	Main Envelopes	1		
	Replacement Ballot Envelope and Log	1		
	MBB Transfer Envelopes		2:station	
	Agenda	1		
	Security seals	1		
	eScan Ballot Box compartment keys	1 set		

Equipment List

	Item	Quantity	Ratio	Notes
Hardware	Power strip(s)/Surge protector(s)			
	Extension Cords			
	Judge's Booth Controller(s)		1:1 – 4 trainees	JBCs must be programmed in advance with training signing key
	Device printer paper rolls			
	eSlates in booths		1: 1 or 2 trainees	Will vary
	DAU(s) in booths		1:1 or 2 trainees	
	eScans		1:lab station	eScans must be programmed in advance with training signing key
	Paper Ballot Booths			Will vary
	Battery packs			
	MBB(s) with relevant ballots/Labels			JBC and eScan – check eScan options settings
	DAU cards & Labels			
	Headphones			
	Tactile Input Switches			
	Reset cable for eSlate	1		
	Reset crossover cable for eScan	1		
	SERVO Computer	1		
	Presentation Computer			
	Presentation System (speakers)			
LCD Projector				
PC speakers				

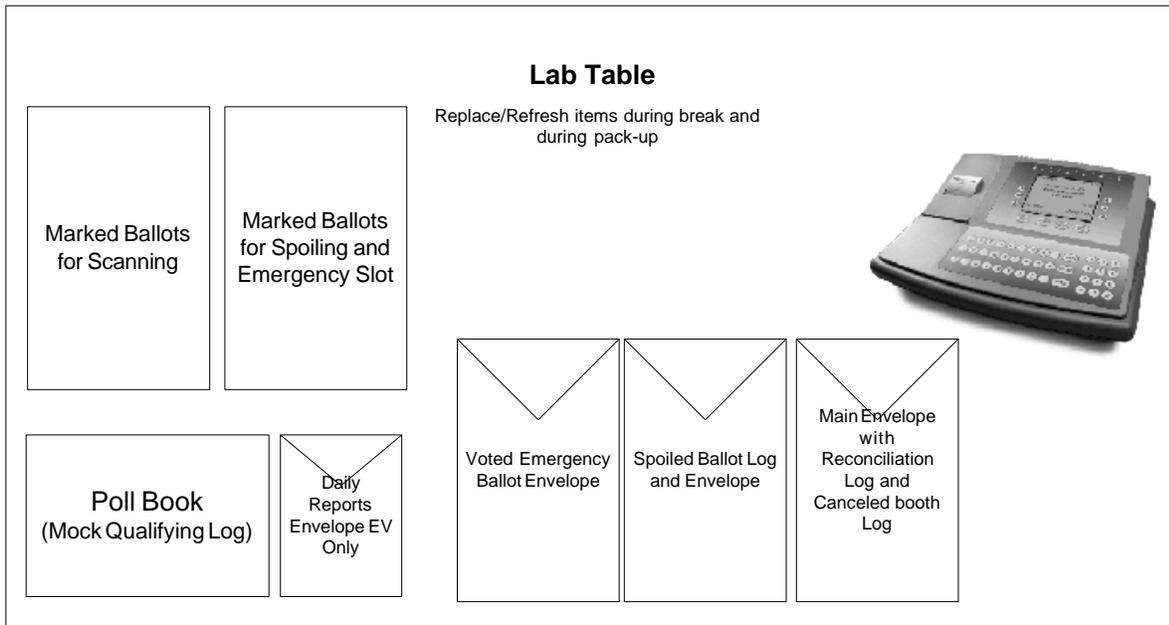
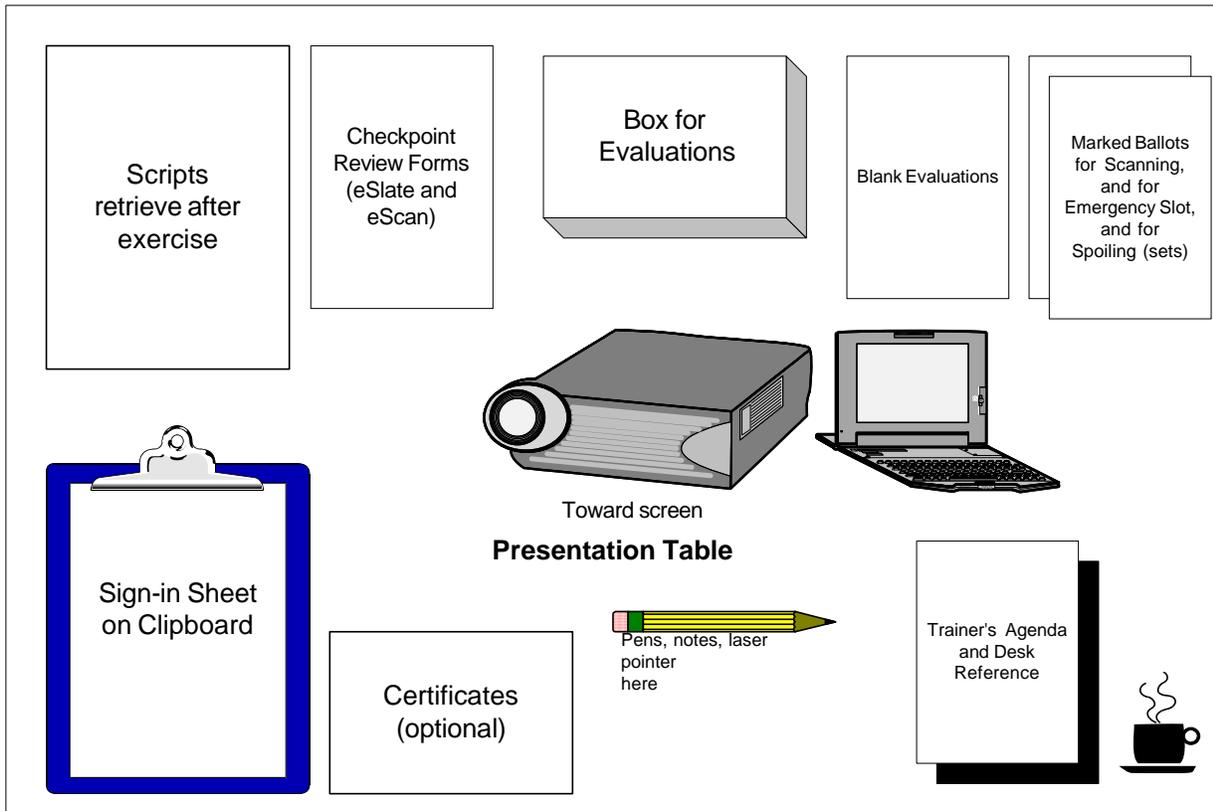
	Item	Quantity	Ratio	Notes
Miscellaneous Supplies	Marked ballots		12:station	With overs, unders, and blanks, these can be re-used
	Torn or mismarked ballots		2:station	For Emergency Slot and Spoil
	Daily Reports Envelopes			
	Main Envelopes			
	Spoiled Ballot Envelope			
	Voted Emergency Ballot Envelope		1:station	
	MBB Transfer Envelopes		2:station	
	Ballot Privacy Sleeves	6	1:station	
	Agenda			
	Glass cleaner and soft cloth	1		
	Clipboard(s)	1		
	Screwdriver(s)	1		
	Laser Pointer	1		
	Presentation Screen	1		
	PowerPoint Slideshow(s)	1		
	Set up video/mpeg			
	How To Vote video/mpeg			
	Tape			
	Security seals			
	eScan Ballot Box compartment keys			
Ballot Transfer cases		1:station		

	Item	Quantity	Ratio	Notes
Documentation	HVS Polling Place System DR		1:1	
	Voter Registration Computer TM			Optional
	eSlate Script Placard		1:2	
	Voter Instructions flyers		samples	
	Voter Instructions Placards		1/booth	
	Flag Placard		1/booth	Optional
	Self-Assessment "Checkpoint" forms, Hart Voting System		1:1	
	Simulation Checklists		1:lab station	
	Polling Place ID list			
	Password list			
	Mock Qualifying Station Log for PPOps	1		
	Reconciliation Log		2:JBC:session	
	Canceled Booth Log		2:JBC:session	
	Training Evaluation forms		3:class	
	Sign-in Sheet		1:class	
Certificates		1:1	Optional	

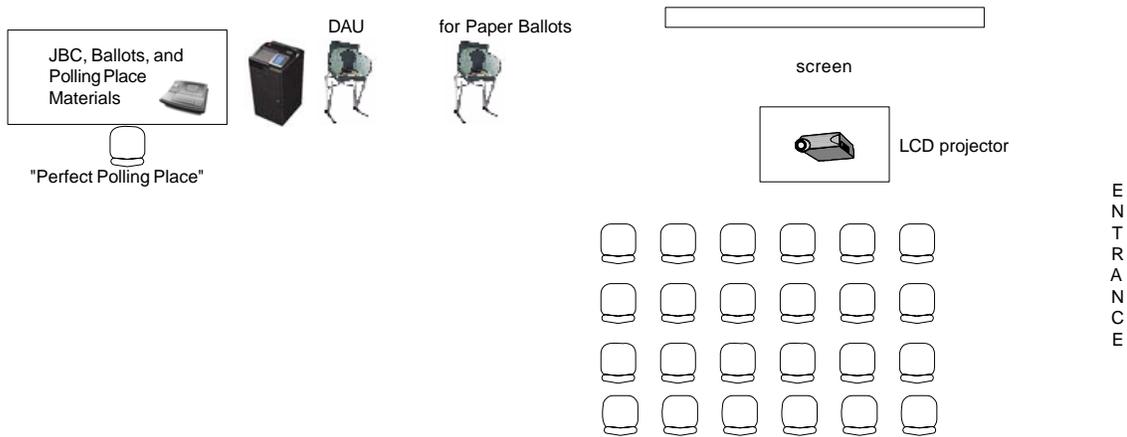
Document Use for Polling Place Operations Training

At Central Table	Hand out to Trainees	At the JBC
Sign-in sheet	Hart Voting System Polling Place Desk Reference	Reconciliation Log
	Voter Instruction script(s)	Main and Daily (EV only) Reports Envelopes w/ logs (Cancelled Booth Log)
	Training Evaluation (2-3 per class)	Mock qualifying log (poll book)
		Spoiled Ballot Envelope
		Emergency Ballot Envelope
		Self-Assessment "Checkpoint"

Document Layout on Tables



Physical Classroom Layout



HART VOTING SYSTEM POLLING PLACE OPERATIONS (eSlate and eScan)

Ideal Classroom Size: at least 30' x 60', or 1800-plus square feet (this graphic not to scale)

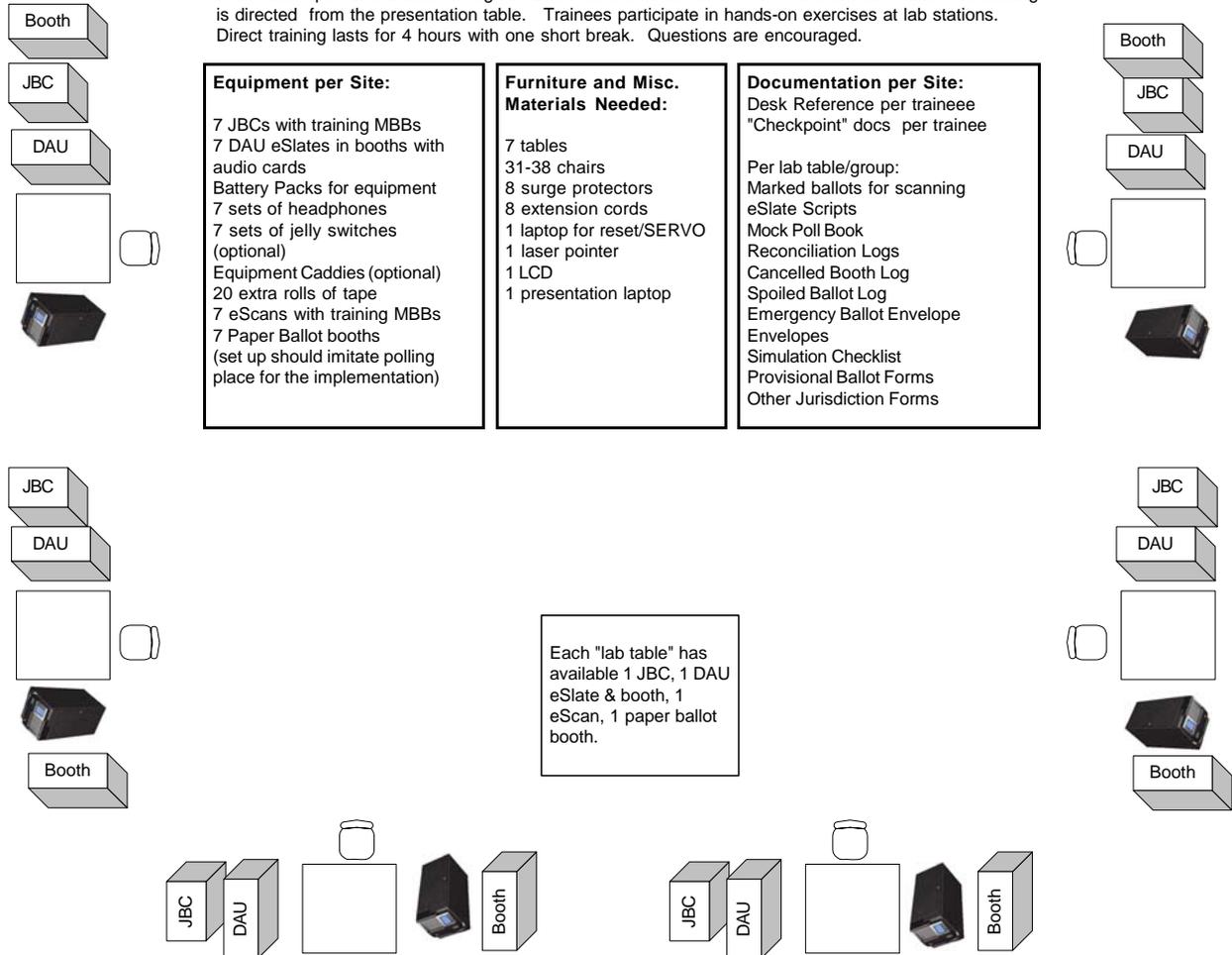
Trainers: 1-2

Jurisdiction Personnel: 1

Trainees: Will vary, ideally no more than 4 trainees per station (24 per session with 6 stations).

Time allotted per session: 4 hours (schedule classes every 4.5 hours)

Process: Upon arrival trainees sign in. Desk Reference documents are handed out. Classroom training is directed from the presentation table. Trainees participate in hands-on exercises at lab stations. Direct training lasts for 4 hours with one short break. Questions are encouraged.



Hart Voting System Poll Worker's Guide to Assisting Voters Course Training Agenda

Estimated Time: 1 ½ hours

Audience: All non-lead poll workers

Objectives: Trainees will become familiar with voting on the eSlate and eScan in order to instruct and assist voters.

Benefits of the system: The eSlate is simple to operate. There are on-screen prompts that guide the voter through the voting process. Voters learn the system quickly. There is no way a voter can overvote, and voters are reminded of their undervotes. Voters with disabilities have equal and private access to voting. The eScan is simple to operate with on-screen prompts, and it is easy to monitor. With the eScan, it is easy to process a voter's ballot. Voters quickly learn the system. Voters are reminded of their undervotes and overvotes, as per jurisdiction setup.

Manuals: Hart Voting System Poll Worker's Guide to Assisting Voters Desk Reference

Other Materials: PowerPoint Slideshow, Voter Instructions flyers, Voter Instructions placards, Flag placards, eSlate script, Welcome to eSlate Slideshow or How to Vote video/mpeg.

Modules: 1-4

Prerequisite: None

Before-Class Responsibilities:

1. Make certain room is tidy.
2. Make certain each lab station has extra JBC paper.
3. Lay out materials (Desk References on chairs, written review ready, evaluations ready, sign-in sheet on clipboard.)



Getting Started/Opening:

1. **How to Vote video runs in loop.**
2. **Trainees seat themselves in classroom area and sign in (pass sign-in sheet around on a clipboard).**

Teaching Points:

- **Module 1: eSlate Features** (*Timing: 25 minutes. Most should be spent on Exercise 1.1*)
 - ▶ Getting Started
 - ▷ Greet trainees, introduce yourself, and outline format, breaks, use of the “parking lot” for questions, training manual overview and
 - ▷ Start the slide show, system overview, benefits to trainees and course objectives
 - ▶ How to Vote on the eSlate
 - ▷ Access code
 - ▷ **SELECT** wheel, **ENTER** button, **CAST BALLOT** button
 - ▷ You have finished voting when you see the waving American Flag
 - ▶ Other Features
 - ▷ **HELP** button
 - ▷ **PREV** and **NEXT** buttons
 - ▷ Intentionally skipping contests
 - ▷ Intentionally casting a blank ballot
 - ▷ Canceling a choice
 - ▷ Changing a choice
 - ▷ *Changing a choice from Ballot Summary (emphasize)*
 - ▷ Skipping the final contest
 - ▷ Multi-page Ballot Summary (specific to ballot)
 - ▷ Write-in (specific to ballot)
 - ▷ Straight Party (specific to ballot)
 - ▷ Verifiable Ballot Option, if applicable
 - **Exercise 1.1:** Vote and cast a ballot on an eSlate. Use the “Other Features for Votes” page of the Desk Reference as a reference to trying eSlate ballot features. Try the **PREV**, **NEXT**, and **HELP** buttons, cancel a choice, change a choice, try the write-in, and skip a contest.

DR page

PPT Slide

- **Module 2: DAU eSlate Features (Demonstration Only)** (*Timing: 10 minutes*)
 - ▶ Disabled Access Unit
 - ▷ Headphones
 - ▷ Jelly switches (tactile input devices)
 - ▷ Orientation to the DAU buttons
 - ▷ Sip and Puff input device
 - ▶ Curbside Voting
 - ▷ (Add Voter)
 - ▷ Check for battery power
 - ▷ Enter Voter's ACCESS CODE
 - ▷ Disconnect eSlate (and peripherals)
 - ▷ Voter votes and casts ballot
 - ▷ Reconnect eSlate to the system and confirm that ballot was cast (reconnect peripherals)
 - **Instructor Demonstrates**

- **Module 3: eSlate Voter Instructions** (*Timing: 15 minutes*)
 - ▶ Ballot Styles
 - ▷ Access Code and Ballot Header indicate precinct number
 - ▶ eSlate Voter Instructions
 - ▷ Pick up an ACCESS CODE after qualifying
 - ▷ Go to any open booth
 - ▷ Select language, if option available
 - ▷ Enter the ACCESS CODE
 - ▷ Make choices using the **SELECT** wheel and the **ENTER** button.
 - ▷ Read the Ballot Summary
 - ▷ Press the **CAST BALLOT** button from the last page of Ballot Summary
 - ▷ If using eSlate with VBO, verify paper ballot and press **CAST BALLOT** until you see the waving American flag
 - ▶ How to Help a Voter
 - **Exercise 3.1:** Using a placard, flyer, script, or demonstration unit eSlate, the instructor and a volunteer give voter instructions aloud for group.
 - **Exercise 3.2:** Instructor and a volunteer from the audience model assisting a voter who has requested help.
 - Working with Voters with Disabilities:
 - Adopt a service approach – ask, don't assume
 - Slow down when working with Persons with Disabilities
 - Take time to escort person to booth and orient to device

▶ **Module 4: eScan Working With Voters** (Timing: 30 minutes)

- ▶ Ballot Styles
 - ▷ Ballot Header indicates precinct number
- ▶ Basic Voter Instructions eScan
 - ▷ Receive a ballot for your precinct after signing in
 - ▷ Go to any open booth
 - ▷ Make ballot choices by filling in the box next to your selections with a black or blue pen
 - ▷ Slip the marked ballot into the provided privacy sleeve
 - ▷ Insert the voted ballot into the scanner and follow scanner screen directions to cast your ballot.
 - **Exercise 4.1:** Volunteer gives eScan ballot instructions.
 - ✓ **Review Question:** When and how would you give instructions?
- ▶ How to Help A Voter
 - ▷ Voter privacy
 - ▷ Filling in the box to mark options selected
 - ▷ Stray marks on the ballot
 - ▷ Voting for a write-in candidate, if applicable
- ▶ Processing a Ballot

NOTE: Ballot processing will be determined by eScan settings in BOSS. Review these, and set up training ballot to use identical settings.

 - ▷ Review Troubleshooting ballot-related error codes (Desk Reference list)
 - ▷ How poll workers use the **Poll Worker** button
 - ▷ Emergency ballot processing procedures (Emergency slot)
 - ▷ Troubleshooting codes (Desk Reference list)
 - **Exercise 4.2:** Scan and process marked ballots as if you are voters. Process a write-in, if applicable. Respond to eScan screen prompts, including those as if you are the poll worker.

- **Review/Appendices/Assessment** (*Timing: 10 minutes*)
 - ▶ “Checkpoint” Self Assessment, if applicable
 - ▷ PowerPoint slide with correct answers
 - ▶ Review Desk Reference sections not covered specifically in class
 - ▷ System Security
 - ▷ Guide to Serving Voters with Disabilities
 - ▷ FAQs
 - ▷ Glossary
 - ▶ Parking Lot Questions
 - ▶ Q&A
 - ▶ Evaluation forms (limited number – first, middle, and final names on the sign-in sheet)

After-class Responsibilities:

1. **File sign-in sheet in envelope for runner pick-up.**
2. **File evaluations in envelope for Hart training specialist.**
3. **Pick up trash and tidy up room.**
4. **Set out materials for the next class.**
5. **Check paper in devices.**
6. **If you are the last class for the day, shut off all equipment.**

Instructors Reset and Predefine equipment, if necessary.

System Reset Procedure with SERVO:

In order to reset equipment, the instructor must have Hart InterCivic's SERVO application. The instructor must be a SERVO user with "Admin Reset" permissions. The instructor also needs cables for connecting the SERVO computer to the polling place equipment, a network crossover cable for the eScan, and a parallel cable for the eSlate system. These cables are included with the SERVO computer, which is usually a laptop.

1. Leave the MBB in the device (it will be reset to zero Cast Vote Records, making it reusable for another training event), and power on the device. **Make certain that all voting equipment is powered on. This may take up to 12-15 seconds.**
2. Audio Cards do not need to be removed from DAU eSlates in order to reset.
3. If using the eSlate system, up to 12 eSlates (booths) may be connected to the JBC in a daisy chain.
4. Select the SERVO shortcut on the PC desktop and log in to the SERVO application.
5. Go to the SERVO **Admin Tools** menu and click **Device Reset**.
6. Connect the cable from the SERVO PC to the JBC or eScan.

For JBCs, connect to the printer port. For eScans, connect to the network port. In the **Device Reset** window, select the radio button for the device type. Wait for the **Device Reset** window to confirm that the device has been reset (lower left corner of the window) and listen for the audible "ding."

7. Each device screen will display a message confirming that the reset is complete.
8. After resetting all equipment, proceed to predefine equipment, for the next training session, if applicable.
9. To predefine, duplicate warehouse steps that would be performed prior to sending out JBC and/or eScan equipment. (eSlates are NOT connected to the JBC for this process.) Unplug and restart the eScan or JBC, enter the Start-Up Password, Polling Place I.D. (____), select type of voting, confirm configuration, print Zero Tape, and unplug eScan or JBC.
10. Equipment is ready.

- **Troubleshooting:** Restart voting device, restart SERVO, and check network connections and settings. (PC Network settings must be compatible with eScan; Start/Settings/Network and Dial-up Connections/Local Area Connection/TCP/IP/Properties/Use the following address.) Disable and then enable the network connection. Run ipconfig command prompt. Retry.



Equipment List

	Item	Quantity	Ratio	Notes
Hardware	Power strip(s)/Surge protector(s)			
	Extension Cords			
	Judge's Booth Controller(s)		1:1 PVS daisy chain	Programmed to training eCM
	JBC printer paper rolls		1: class	
	eSlates in booths		1: 1 or 2 trainees	
	DAU(s) in booths		1:1 or 2 trainees	
	eScans			Programmed to training eCM
	Booths			
	Battery packs			
	MBB(s) with relevant ballots/Labels			
	DAU cards & Labels			
	Headphones			
	Jelly Switches			
	JBC Reset Cable	1		
	eScan Reset crossover cable			
	SERVO Computer	1		
	Presentation Computer	1		
	Presentation System	1		
PC speakers				

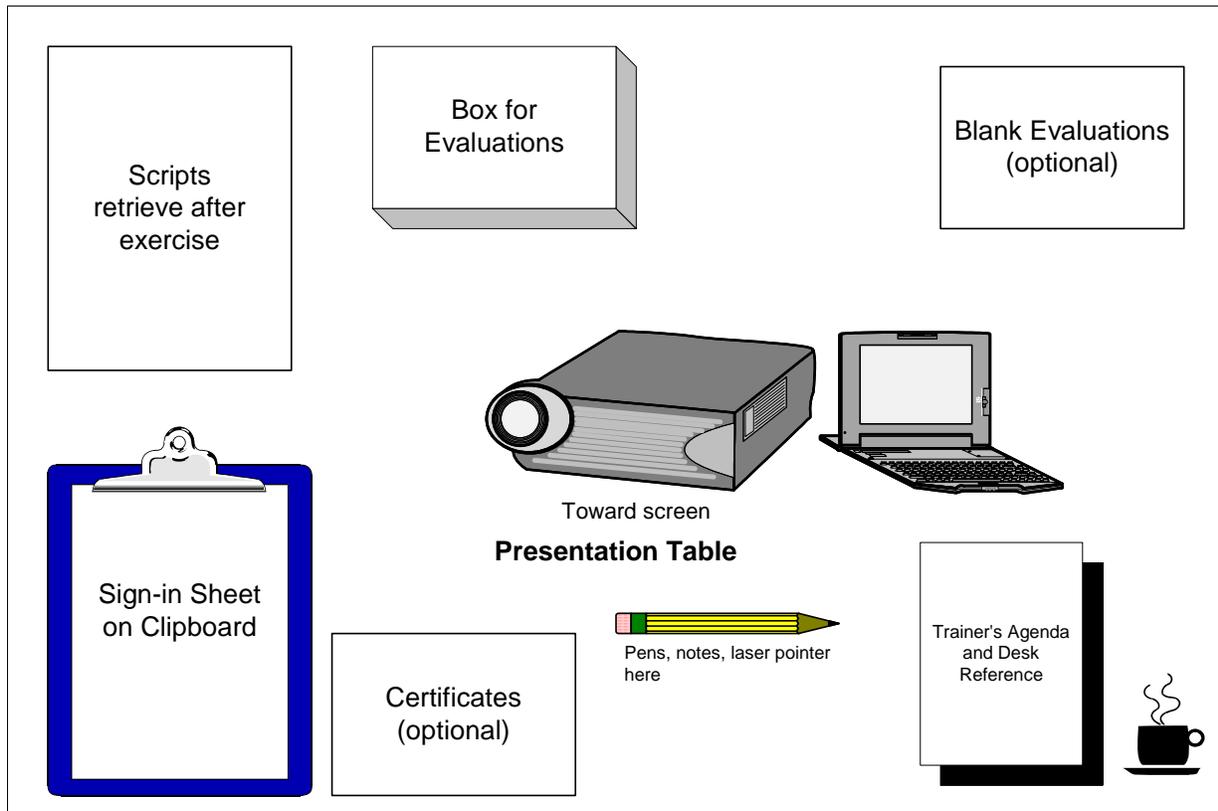
	Item	Quantity	Ratio	Notes
Miscellaneous Supplies	Marked Ballots for scanning		4:trainee	
	Blank Ballots			Large number needed
	Agenda	1		
	Name Tags			
	Glass cleaner and soft cloth	1		
	Pens		1:1	
	Markers			
	Clipboard(s)	1		
	Screwdriver(s)	1		
	Laser Pointer	1		
	LCD projector	1		
	Presentation Screen	1		
	PowerPoint Slideshow(s)	1		
	How To Vote video/mpeg	1		
	U.S. Flags			
	Tape			
	JBC security seals	1/JBC		
	Polling Place ID list			
	Passwords list			
	Security seals			
eScan Ballot Box compartment keys				

	Item	Quantity	Ratio	Notes
Documentation	Poll worker's GTAV DR		1/trainee	
	eSlate Script Placard		1:2	
	Voter Instructions flyers		samples	
	Voter Instructions Placards		1/booth	
	Flag Placard		1/booth	
	Checkpoint form (optional)		1:1	
	Training Evaluation forms (optional)		3: Class	
	Sign-in Sheet		1: Class	
	Certificates (optional)		1:1	

Document Use for eSlate Operations Training

At Central Table	Hand out to Trainees
Sign-in sheet	Appropriate Desk Reference (on chairs)
	eSlate picture w/ script (for exercise, 1 per 2 trainees and retrieve materials)
	Training Evaluation (2-3 per class, optional)

Document Layout at Presentation Table



Physical Classroom Layout



HART VOTING SYSTEM POLL WORKER'S GUIDE TO ASSISTING VOTERS

(eSlate and eScan)

Ideal Classroom Size: at least 40' x 80', or 3200-3600 square feet (this graphic not to scale)

Trainers: 1

Jurisdiction Personnel: 1

Trainees: Will vary, maximum of 50 trainees per class

Time allotted per session: 1 1/2 hours

Process: Upon arrival trainees sign in. Desk Reference documents are available, and trainees peruse these as they sit. Training is directed with a PowerPoint presentation, video, and hands-on experience with the equipment. Modules include eSlate Features, DAU and Curbside Features, eSlate Voter Instructions, and eScan Voter Instructions. DAU and curbside operations are demonstration-only. Direct training lasts for 1 1/2 hours with no break. Questions are encouraged.

County Responsibilities for Equipment per Site:
5 JBCs
10 eSlates
5 DAU
5 eScans
10 MBBs with training ballot
6 DAU cards with audio
Battery Packs for equipment
6 sets of headphones
6 sets of jelly switches
8 surge protectors w/o on/off
8 extension cords
booths
20 extra rolls of printer tape

Site Responsibilities for Equipment:
6 tables
50 chairs
1 screen
1 LCD projector, if available
1 presentation system, if available (mic and speaker set up)

Hart Responsibilities for Equipment per Site:
1 LCD projector, if not available per site
1 presentation system, if not available per site
1 laptop for slideshow
1 laptop for reset/SERVO
1 laser pointer
Training documentation

1 JBC & up to 12 eSlates per string for hands-on eSlate voting. 1 eScan and booths for hands-on voting.

Appendix C: Evaluation and Assessment Tools

The following pages include Hart Voting system tools used for the following:

1. Course evaluation - This is meant to answer the questions:
 - a. Did the training sessions appeal to the trainees?
 - b. How can the presenter improve the presentation?
 - c. How can the course be better structured to meet trainee needs?
2. Trainee performance assessments (simulation exercises) - These are meant to answer the questions:
 - a. Can the trainees perform the functions taught in the session?
 - b. Where are the deficits in performance?
3. Trainee skills review instruments (Self-Assessment “Checkpoint” instruments) - These are meant to answer the questions:
 - a. Do the trainees have the knowledge that they are expected to in order to successfully manage the polling place with the Hart voting equipment?
 - b. Do trainees know where to look for help?
 - c. Can the trainees use the available resources (e.g., the Desk Reference) to find the information that they need, when necessary?
 - d. Did the training work?

Answer keys for self-assessment “Checkpoint” instruments are also included.

Note:

Each of the following tools is appropriate for a specific course. Refer to training agendas for details about what tool(s) to use for each course.

Assessment tools may be customized slightly per implementation. The tools included here are the “standard” forms. These forms also exist as stand-alone documents.

The page numbering for this appendix does NOT follow the numbering for this book. Each form has page numbering specific to that form.

Notes:



Name (optional):			
Instructor:		Date:	
Jurisdiction:		Course:	

On a scale of 5 to 1 (5 being the **Highest** rating; 1 being **Lowest** rating), please rate the following items regarding your instruction.

Instructor Training Skills:

Items	5 Strongly Agree	4 Somewhat Agree	3 Agree	2 Somewhat Disagree	1 Strongly Disagree
1. The instructor was knowledgeable of the subject matter.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. The instructor's presentation was clear & easy to understand.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. The instructor made good use of available time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. The instructor encouraged questions and participation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. The instructor showed a high level of respect toward class participants.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. The directions for activities given by the instructor were clear and easy to understand.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. The instructor presented the objectives clearly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Course Content:

Items	5 Strongly Agree	4 Somewhat Agree	3 Agree	2 Somewhat Disagree	1 Strongly Disagree
8. The training materials were helpful.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. The exercises were helpful and time well spent.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. The course was appropriate for my level of expertise.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. The course materials were organized in a logical manner and were useful resources to learning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. The course objectives were achieved.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. After completing the course, I feel like I have learned the basic tasks required in my job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



eSlate Early Voting Polling Place Simulation Exercise Checklist

Names: _____

Date: _____

- Open polls; enter in log & file reports (group)
- Add at least one voter (individual)
- Cast a ballot with a write in candidate (individual)
- Change a choice from the Ballot Summary (individual)
- Help a voter (pair)
- Add a provisional voter (pair)
- Check an Access Code and list status (group)
Status: _____
- Print an "Access Code Report" (pair)
- Cancel a booth and complete log (group)
- Change the paper in the JBC (group)
- Suspend polls; complete log & file reports (group)
- Reopen polls; complete log & file reports (group)
- Cast at least 5 ballots, total (group)
- Suspend polls; complete log & file reports (group)

Please notify a trainer when you have completed the checklist so that the equipment can be reset.



eSlate Election Day Polling Place Simulation Exercise Checklist

Names: _____

Date: _____

- Open polls; enter in log & file reports (group)
- Add at least one voter (individual)
- Cast a ballot with a write in candidate (individual)
- Change a choice from the Ballot Summary (individual)
- Help a voter (pair)
- Add a provisional voter (pair)
- Check an Access Code and list status (group)
Status: _____
- Print an “Access Code Report” (pair)
- Cancel a booth and complete log (group)
- Change the paper in the JBC (group)
- Make sure you cast at least 5 ballots, total (group)
- Close polls; complete log & file reports (group)

Please notify a trainer when you have completed the checklist so that the equipment can be reset.



eScan Early Voting Polling Place Simulation Exercise Checklist

Names: _____

Date: _____

- Open polls; complete log & file reports (group)
- Vote and scan a paper ballot (individual)
- Spoil a paper ballot and complete log (group)
- Shut off power and use the Emergency Slot (group)
- Power on and scan ballots in the Emergency Ballot Receptacle (group)
- Change the paper in the eScan (group)
- Suspend polls; complete log & file reports (group)
- Reopen polls; complete log & file reports (group)
- Cast at least 5 ballots, total (group)
- Suspend polls; complete log & file reports (group)

Please notify a trainer when you have completed the checklist so that the equipment can be reset.



eScan Election Day Polling Place Simulation Exercise Checklist

Names: _____

Date: _____

- Open polls; complete log & file reports (group)
- Vote and scan a paper ballot (individual)
- Spoil a paper ballot and complete log (group)
- Shut off power and use the Emergency Slot (group)
- Power on and scan ballots in the Emergency Ballot Receptacle (group)
- Change the paper in the eScan (group)
- Close polls; complete log & file reports (group)

Please notify a trainer when you have completed the checklist so that the equipment can be reset.



Hart Voting System Early Voting Polling Place Simulation Exercise Checklist

Names: _____

Date: _____

- Open polls; complete log & file reports (group)
- Add at least one voter on the JBC (individual)
- Vote an eSlate ballot with a write in candidate, if available, and change a choice from the Ballot Summary (individual)
- Use the DAU eSlate with headphones (pair)
- Vote and scan a paper ballot (individual)
- Add and vote a provisional eSlate ballot (pair)
- Check an Access Code and list status (group)
Status: _____
- Cancel an eSlate booth and complete log (group)
- Spoil a paper ballot and complete log (group)
- Change the paper in the JBC or eScan (group)
- Suspend polls; complete log & file reports (group)
- Reopen polls; complete log & file reports (group)
- Cast at least 5 ballots, total per device (group)
- Suspend polls; complete log & file reports (group)

Please notify a trainer when you have completed the checklist so that the equipment can be reset.



Hart Voting System Election Day Polling Place Simulation Exercise Checklist

Names: _____

Date: _____

- Open polls; complete log & file reports (group)
- Add at least one voter on the JBC (individual)
- Vote an eSlate ballot with a write in candidate, if available, and change a choice from the Ballot Summary (individual)
- Use the DAU eSlate with headphones (pair)
- Vote and scan a paper ballot (individual)
- Add and vote a provisional eSlate ballot (pair)
- Check an Access Code and list status (group)
Status: _____
- Cancel an eSlate booth and complete log (group)
- Spoil a paper ballot and complete log (group)
- Change the paper in the JBC or eScan (group)
- Close polls; complete log & file reports (group)

Please notify a trainer when you have completed the checklist so that the equipment can be reset.

Name:		Date:	
Representing:			

Early Voting eSlate System Self-Assessment “Checkpoint”



Directions: Answer the following questions in the limited time given. Use any of the resources handed out during the course to assist you, and feel free to consult with your fellow trainees.

Please write the letter of the BEST answer on the line next to the question number.

- _____ 1. WHEN SHOULD POLL WORKERS GIVE VOTERS eSLATE INSTRUCTIONS?
- A) After voters get to the eSlate booth B) Before voters get to the eSlate booth
- C) Never
- _____ 2. HOW DO YOU SELECT THE VOTER'S PRECINCT ON THE JBC, AFTER CHOOSING "ADD VOTER"?
- A) Use the keypad on the JBC to type in the precinct, and then press the arrow button next to that precinct. B) Use ▲ and ▼ on the JBC to scroll through precinct options, and then press the arrow button next to the correct precinct.
- C) Press **Print** on the JBC. D) A and B are both correct.
- _____ 3. WHAT DO YOU DO TO MAKE CERTAIN AN eSLATE'S BATTERY IS AVAILABLE?
- A) Check the **Battery** indicator in the corner of the eSlate language or access code page. B) Press the eSlate's **BATTERY ON** button.
- _____ 4. WHEN SHOULD YOU GIVE A VOTER AN ACCESS CODE?
- A) After the voter has received instructions and checked-in, and when there is an open eSlate booth. B) While all the eSlate booths are being used.
- C) While the voter is waiting in line. D) Before giving voter instructions.
- _____ 5. WHAT GOES INTO THE DAILY JBC REPORTS ENVELOPES?
- A) Polls Open reports from the JBC at the beginning of the day B) Extra access codes (overprint)
- C) Polls Suspended reports from JBC at end of day D) Answers A, B, and C

- _____ 6. AT THE POLLING PLACE, WHICH OF THE FOLLOWING WILL HELP YOU REMEMBER THE STEPS AND PROCEDURES FOR RUNNING THE JBC?
- A) eSlate System Desk Reference B) Booth Placards
C) Voter Instruction Flyers D) The voters
- _____ 7. IN ORDER TO CHANGE JBC PRINTER PAPER CORRECTLY, SHOULD THE NEW PAPER ROLL OUT FROM THE TOP OR THE BOTTOM?
- A) Top B) Bottom
- _____ 8. WHAT WOULD YOU DO IF A PIECE OF EQUIPMENT QUIT WORKING?
- A) Look in the Desk Reference B) Check connections, make certain that all
troubleshooting guide. voters are off eSlates, and restart the
JBC.
C) Call the Help desk. D) Answers A, B, and C
- _____ 9. WHAT HAPPENS WHEN VOTERS PRESS **HELP** ONCE? TWICE?
- A) Once: They enter a vote. B) Once: They get help from a poll
Twice: They cast the ballot. worker.
Twice: They get help from a judge.
C) Once: They get a help screen. D) Once: Lights flash.
Twice: They get help from a poll Twice: Lights flash and beep.
worker who saw the flashing light
on the JBC.
- _____ 10. WHICH OF THE FOLLOWING MUST BE DONE IN ORDER TO TAKE THE CURBSIDE eSLATE OUT TO A VOTER?
- A) Press **CAST BALLOT**. B) Enter the language (if available) and
access code into the eSlate before
disconnecting the eSlate from the booth.
C) Nothing. Simply unplug the machine at D) Press **HELP** twice.
the language screen and take it to the
curb.

Name:		Date:	
Representing:			

Election Day eSlate System Self-Assessment “Checkpoint”



Directions: Answer the following questions in the limited time given. Use any of the resources handed out during the course to assist you, and feel free to consult with your fellow trainees.

Please write the letter of the BEST answer on the line next to the question number.

- _____ 1. WHEN SHOULD POLL WORKERS GIVE VOTERS eSLATE INSTRUCTIONS?
- A) After voters get to the eSlate booth B) Before voters get to the eSlate booth
- C) Never
- _____ 2. WHAT GOES INTO THE MAIN ENVELOPE?
- A) Polls Open reports from the JBC at the beginning of the day B) Extra access codes (overprint)
- C) Polls Closed reports from the JBC at the end of the day D) Answers A, B and C
- _____ 3. WHAT DO YOU DO TO MAKE CERTAIN AN eSLATE'S BATTERY IS AVAILABLE?
- A) Check the **Battery** indicator in the corner of the eSlate language or access code page. B) Press the eSlate's **BATTERY ON** button.
- _____ 4. WHEN SHOULD YOU GIVE A VOTER AN ACCESS CODE?
- A) After the voter has received instructions and checked-in, and when there is an open eSlate booth. B) While all the eSlate booths are being used.
- C) While the voter is waiting in line. D) Before giving voter instructions.
- _____ 5. AT THE POLLING PLACE, WHICH OF THE FOLLOWING WILL ASSIST VOTERS?
- A) Booth Placards B) Poll workers
- C) Voter Instruction Flyers D) Answers A, B and C

- _____ 6. AT THE POLLING PLACE, WHICH OF THE FOLLOWING WILL HELP YOU REMEMBER THE STEPS AND PROCEDURES FOR RUNNING THE JBC?
- A) eSlate System Desk Reference B) Booth Placards
C) Voter Instruction Flyers D) The voters
- _____ 7. IN ORDER TO CHANGE JBC PRINTER PAPER CORRECTLY, SHOULD THE NEW PAPER ROLL OUT FROM THE TOP OR THE BOTTOM?
- A) Top B) Bottom
- _____ 8. WHAT WOULD YOU DO IF A PIECE OF EQUIPMENT QUIT WORKING?
- A) Look in the Desk Reference B) Check connections, make certain that all
troubleshooting guide. voters are off eSlates, and restart the
JBC.
C) Call the Help Desk. D) Answers A, B and C
- _____ 9. WHAT HAPPENS WHEN VOTERS PRESS **HELP** ONCE? TWICE?
- A) Once: They enter a vote. B) Once: They get help from a poll
Twice: They cast the ballot. worker .
Twice: They get help from a judge.
C) Once: They get a help screen. D) Once: Lights flash.
Twice: They get help from a poll Twice: Lights flash and beep.
worker who saw the flashing light
on the JBC.
- _____ 10. WHICH OF THE FOLLOWING MUST BE DONE IN ORDER TO TAKE THE CURBSIDE eSLATE OUT TO A VOTER?
- A) Press **CAST BALLOT**. B) Enter the language (if available) and
access code into the eSlate before
disconnecting the eSlate from the booth.
C) Nothing. Simply unplug the machine at D) Press **HELP** twice.
the language screen and take it to the
curb.

Name:		Date:	
Representing:			

Early Voting eScan System Self-Assessment “Checkpoint”



Directions: Answer the following questions in the limited time given. Use any of the resources handed out during the course to assist you, and feel free to consult with your fellow trainees.

Please write the letter of the BEST answer on the line next to the question number.

- _____ 1. WHEN SHOULD POLL WORKERS GIVE VOTERS eSCAN INSTRUCTIONS?
- A) After voters get to the voting booth B) Before voters get to the voting booth
- C) Never
- _____ 2. HOW ARE BALLOTS PROPERLY MARKED?
- A) Mark an “X” in the option box. B) Completely fill in the option box.
- C) Mark a “✓” in the option box. D) Circle the option box.
- _____ 3. WHAT GOES INTO THE MAIN ENVELOPE?
- A) Polls Open reports from the eScan at the beginning of the day B) Ballots
- C) Polls Suspended reports from the eScan at the end of the day D) Answers A and C
- _____ 4. WHAT DO YOU DO TO SET UP THE eSCAN?
- A) Unlock the eScan cover and store it. B) Insert the AC power cord into the power “brick.”
- C) Insert the AC power cord into the back of the eScan. D) Answers A, B, and C
- _____ 5. HOW DO YOU ENTER eSCAN PASSWORDS?
- A) Use the keypad to type in letters, one at a time. B) Use the console to change the number in the highlighted box, move to the next box, and then repeat until all numbers are entered.

_____ 6. AT THE POLLING PLACE, WHICH OF THE FOLLOWING WILL ASSIST VOTERS?

- A) Sample ballots
- B) Poll workers
- C) Voter Instruction Flyers
- D) Answers A, B and C

_____ 7. AT THE POLLING PLACE, WHICH OF THE FOLLOWING WILL HELP YOU REMEMBER THE STEPS AND PROCEDURES FOR RUNNING THE eSCAN?

- A) eScan System Desk Reference
- B) Booth Placards
- C) Voter Instruction Flyers
- D) The voters

_____ 8. TO ASSIST A VOTER IN CASTING AN IMPROPERLY MARKED BALLOT AS-IS, WHAT DO YOU DO?

- A) Slide the ballot into the emergency ballot slot.
- B) Ask the voter, "Are you sure you want to cast your ballot?"
- C) Press the Poll Worker button.
- D) Answers B and C.

_____ 9. TO SUSPEND POLLS, WHAT DO YOU DO?

- A) Press the Poll Worker button to access the Poll Worker menu.
- B) Select SUSPEND from the Poll Worker menu.
- C) Enter the SUSPEND POLLS password.
- D) Answers A, B, and C.

_____ 10. IN ORDER TO CHANGE eSCAN PRINTER PAPER CORRECTLY, SHOULD THE NEW PAPER ROLL OUT FROM THE TOP OR THE BOTTOM?

- A) Top
- B) Bottom

_____ 11. WHAT WOULD YOU DO IF A PIECE OF EQUIPMENT QUIT WORKING?

- A) Use the emergency ballot slot while troubleshooting takes place.
- B) Look in the Desk Reference *Troubleshooting Guide*.
- C) Restart the eScan.
- D) Answers A, B, and C

Name:		Date:	
Representing:			

Election Day eScan System Self-Assessment “Checkpoint”



Directions: Answer the following questions in the limited time given. Use any of the resources handed out during the course to assist you, and feel free to consult with your fellow trainees.

Please write the letter of the BEST answer on the line next to the question number.

- _____ 1. WHEN SHOULD POLL WORKERS GIVE VOTERS eSCAN INSTRUCTIONS?
- A) After voters get to the voting booth B) Before voters get to the voting booth
- C) Never
- _____ 2. HOW ARE BALLOTS PROPERLY MARKED?
- A) Mark an “X” in the option box. B) Completely fill in the option box.
- C) Mark a “✓” in the option box. D) Circle the option box.
- _____ 3. WHAT GOES INTO THE MAIN ENVELOPE?
- A) Polls Open reports from the eScan at the beginning of the day B) Ballots
- C) Polls Closed reports from the eScan at the end of the day D) Answers A and C
- _____ 4. WHAT DO YOU DO TO SET UP THE eSCAN?
- A) Unlock the eScan cover and store it. B) Insert the AC power cord into the power “brick.”
- C) Insert the AC power cord into the back of the eScan. D) Answers A, B, and C
- _____ 5. HOW DO YOU ENTER eSCAN PASSWORDS?
- A) Use the keypad to type in letters, one at a time. B) Use the console to change the number in the highlighted box, move to the next box, and then repeat until all numbers are entered.

_____ 6. AT THE POLLING PLACE, WHICH OF THE FOLLOWING WILL ASSIST VOTERS?

- A) Sample ballots
- B) Poll workers
- C) Voter Instruction Flyers
- D) Answers A, B and C

_____ 7. AT THE POLLING PLACE, WHICH OF THE FOLLOWING WILL HELP YOU REMEMBER THE STEPS AND PROCEDURES FOR RUNNING THE eSCAN?

- A) eScan System Desk Reference
- B) Booth Placards
- C) Voter Instruction Flyers
- D) The voters

_____ 8. TO ASSIST A VOTER IN CASTING AN IMPROPERLY MARKED BALLOT AS-IS, WHAT DO YOU DO?

- A) Slide the ballot into the emergency ballot slot.
- B) Ask the voter, "Are you sure you want to cast your ballot?"
- C) Press the Poll Worker button.
- D) Answers B and C.

_____ 9. TO CLOSE POLLS, WHAT DO YOU DO?

- A) Press the Poll Worker button to access the Poll Worker menu.
- B) Select CLOSE POLLS from the Poll Worker menu.
- C) Enter the CLOSE POLLS password.
- D) Answers A, B, and C.

_____ 10. IN ORDER TO CHANGE eSCAN PRINTER PAPER CORRECTLY, SHOULD THE NEW PAPER ROLL OUT FROM THE TOP OR THE BOTTOM?

- A) Top
- B) Bottom

_____ 11. WHAT WOULD YOU DO IF A PIECE OF EQUIPMENT QUIT WORKING?

- A) Use the emergency ballot slot while troubleshooting takes place.
- B) Look in the Desk Reference *Troubleshooting Guide*.
- C) Restart the eScan.
- D) Answers A, B and C

Name:		Date:	
Representing:			

Hart Voting System Self-Assessment “Checkpoint”



Directions: Answer the following questions in the limited time given. Use any of the resources handed out during the course to assist you.

Please write the letter of the BEST answer on the line next to the question number.

- _____ 1. WHEN SHOULD POLL WORKERS GIVE VOTERS INSTRUCTIONS?
- A) After voters get to the voting booth B) Before voters get to the voting booth
- C) Never
- _____ 2. WHAT DO YOU DO TO MAKE CERTAIN AN eSLATE’S BATTERY IS AVAILABLE?
- A) Check the **Battery** indicator in the corner of the eSlate language or ACCESS CODE page. B) Press the eSlate’s **BATTERY ON** button.
- _____ 3. WHEN SHOULD YOU GIVE A VOTER AN eSLATE ACCESS CODE?
- A) After the voter has received instructions and checked-in, and when there is an open eSlate booth. B) While all the eSlate booths are being used.
- C) While the voter is waiting in line. D) Before giving voter instructions.
- _____ 4. HOW ARE PAPER BALLOTS PROPERLY MARKED?
- A) Mark an “**X**” in the option box. B) Completely fill in the option box.
- C) Mark a “**✓**” in the option box. D) Circle the option box.
- _____ 5. AT THE POLLING PLACE, WHICH OF THE FOLLOWING WILL HELP YOU REMEMBER THE STEPS AND PROCEDURES FOR RUNNING THE HART VOTING EQUIPMENT?
- A) System Desk Reference B) Booth Placards
- C) Voter Instruction Flyers D) The voters

Name:		Date:	
Representing:			

Poll Worker's Guide to Assisting Voters Self-Assessment "Checkpoint"



Directions: Answer the following questions in the limited time given. Use any of the resources handed out during the course to assist you, and feel free to consult with your fellow trainees.

Please write the letter of the BEST answer on the line next to the question number.

- _____ 1. WHEN SHOULD POLL WORKERS GIVE VOTERS INSTRUCTIONS?
- A) After voters get to the voting booth B) Before voters get to the voting booth
- C) Never
- _____ 2. HOW ARE PAPER BALLOTS PROPERLY MARKED?
- A) Mark an "X" in the option box. B) Completely fill in the option box.
- C) Mark a "✓" in the option box. D) Circle the option box.
- _____ 3. AT THE POLLING PLACE, WHICH OF THE FOLLOWING WILL ASSIST VOTERS?
- A) Sample ballots and booth placards B) Poll workers
- C) Voter Instruction Flyers D) Answers A, B and C
- _____ 4. AT THE POLLING PLACE, WHICH OF THE FOLLOWING WILL HELP YOU REMEMBER THE STEPS AND PROCEDURES FOR HELPING VOTERS?
- A) My Desk Reference B) Booth Placards
- C) Voter Instruction Flyers D) The voters
- _____ 5. TO ASSIST A VOTER IN CASTING AN IMPROPERLY MARKED PAPER BALLOT AS-IS, WHAT DO YOU DO?
- A) Slide the ballot into the emergency ballot slot. B) Ask the voter, "Are you sure you want to cast your ballot?"
- C) Press the **Poll Worker** button. D) Answers B and C.

- _____ 6. WHO CAN USE THE DAU eSLATE?
- A) Any qualified voter
 - B) Only a voter who has trouble reading
 - C) Only a voter who is visually or mobility impaired
- _____ 7. WHAT HAPPENS WHEN VOTERS PRESS **HELP** ONCE ON THE eSLATE? TWICE?
- A) Once: They enter a vote.
Twice: They cast the ballot.
 - B) Once: They get help from a poll worker.
Twice: They get help from a judge.
 - C) Once: They get a help page.
Twice: They get help from a poll worker who saw the flashing light on the JBC.
 - D) Once: Lights flash.
Twice: Lights flash and beep.
- _____ 8. WHICH OF THE FOLLOWING MUST BE DONE IN ORDER TO TAKE THE CURBSIDE eSLATE OUT TO A VOTER?
- A) Press **CAST BALLOT**.
 - B) Press **ENTER** and **CAST BALLOT** to check if the battery is working.
 - C) Nothing. Simply unplug the machine at the language screen & take it out.
 - D) Enter the language choice (if available) and access code into the eSlate before disconnecting the eSlate from the booth.

Hart Voting System Exam Key



eSlate EV Ppops Self-Assessment "Checkpoint" Key 30C	
Item Number	Correct Answer
1.	B
2.	D
3.	A
4.	A
5.	D
6.	A
7.	B
8.	D
9.	C
10.	B

eSlate ED Ppops Self-Assessment "Checkpoint" Key 30D	
Item Number	Correct Answer
1.	B
2.	D
3.	A
4.	A
5.	D
6.	A
7.	B
8.	D
9.	C
10.	B

PW eSlate Operations Self-Assessment "Checkpoint" Key 30C	
Item Number	Correct Answer
1.	B
2.	A
3.	D
4.	C
5.	D

Hart Voting System Exam Key

eScan EV PPOps Self-Assessment "Checkpoint" Key 5XB	
Item Number	Correct Answer
1.	B
2.	B
3.	D
4.	D
5.	B
6.	D
7.	A
8.	C
9.	D
10.	B
11.	D

eScan ED PPOps Self-Assessment "Checkpoint" Key 5XB	
Item Number	Correct Answer
1.	B
2.	B
3.	D
4.	D
5.	B
6.	D
7.	A
8.	C
9.	D
10.	B
11.	D

Hart Voting System Exam Key

HVS PPOps Self-Assessment "Checkpoint" Key 5XA	
Item Number	Correct Answer
12.	B
13.	A
14.	A
15.	B
16.	A
17.	B
18.	D
19.	C
20.	B
21.	D

HVS PWGTAV Self-Assessment "Checkpoint" Key 5XA	
Item Number	Correct Answer
1.	B
2.	B
3.	D
4.	A
5.	D
6.	A
7.	C
8.	D

