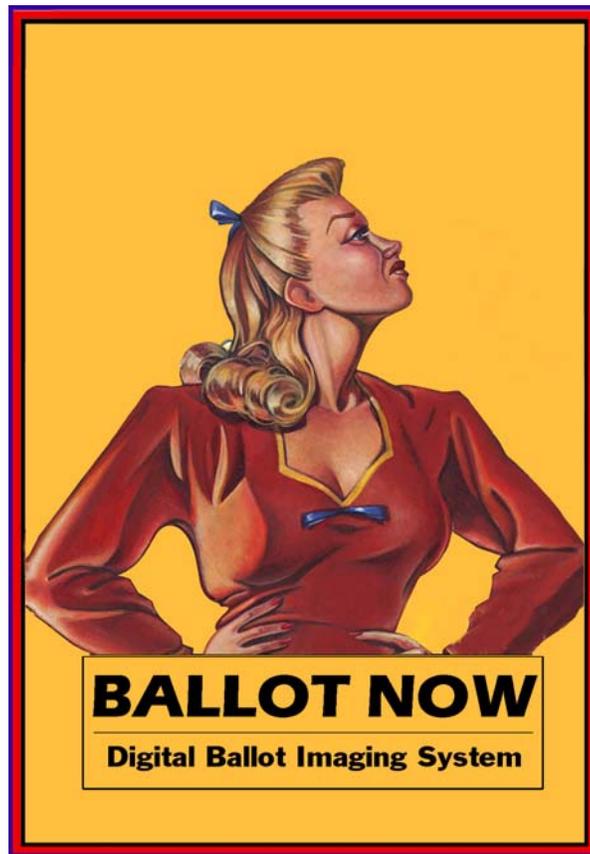


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# Ballot Now™ Training Manual

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Hart Voting System  
System Version 6.2

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Hart InterCivic, Inc.  
P.O. Box 80649  
Austin, TX 78708  
Help Desk Telephone: 866.ASK.HART/866.275.4273  
Fax: 800.831.1485  
Help Desk email: [eSlateSupport@hartic.com](mailto:eSlateSupport@hartic.com)  
Help Desk URL: <http://hartsupport.hartic.com>

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# Chapter 1

## Getting Started

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### Introduction

#### ***What is Ballot Now?***

The Ballot Now software application manages paper ballots for an election by allowing election officials to print, scan, and resolve ballots. Ballot Now does *not* tabulate the votes. As part of the Hart Voting System, Ballot Now accesses ballot style information for a given election from a Mobile Ballot Box (MBB) created with the Ballot Origination Software System (BOSS). Using the data on the MBB, Ballot Now allows election officials to print ballots in any desired quantity. Ballots printed from the Ballot Now application can be scanned as digital images using either Ballot Now or the eScan. Ballot Now also allows on-screen resolution of ballots. When all Cast Vote Records (CVRs) are scanned and complete, Ballot Now writes the CVRs to MBBs, which are read into the Tally application for tabulation.

#### ***This Document***

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

- 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.



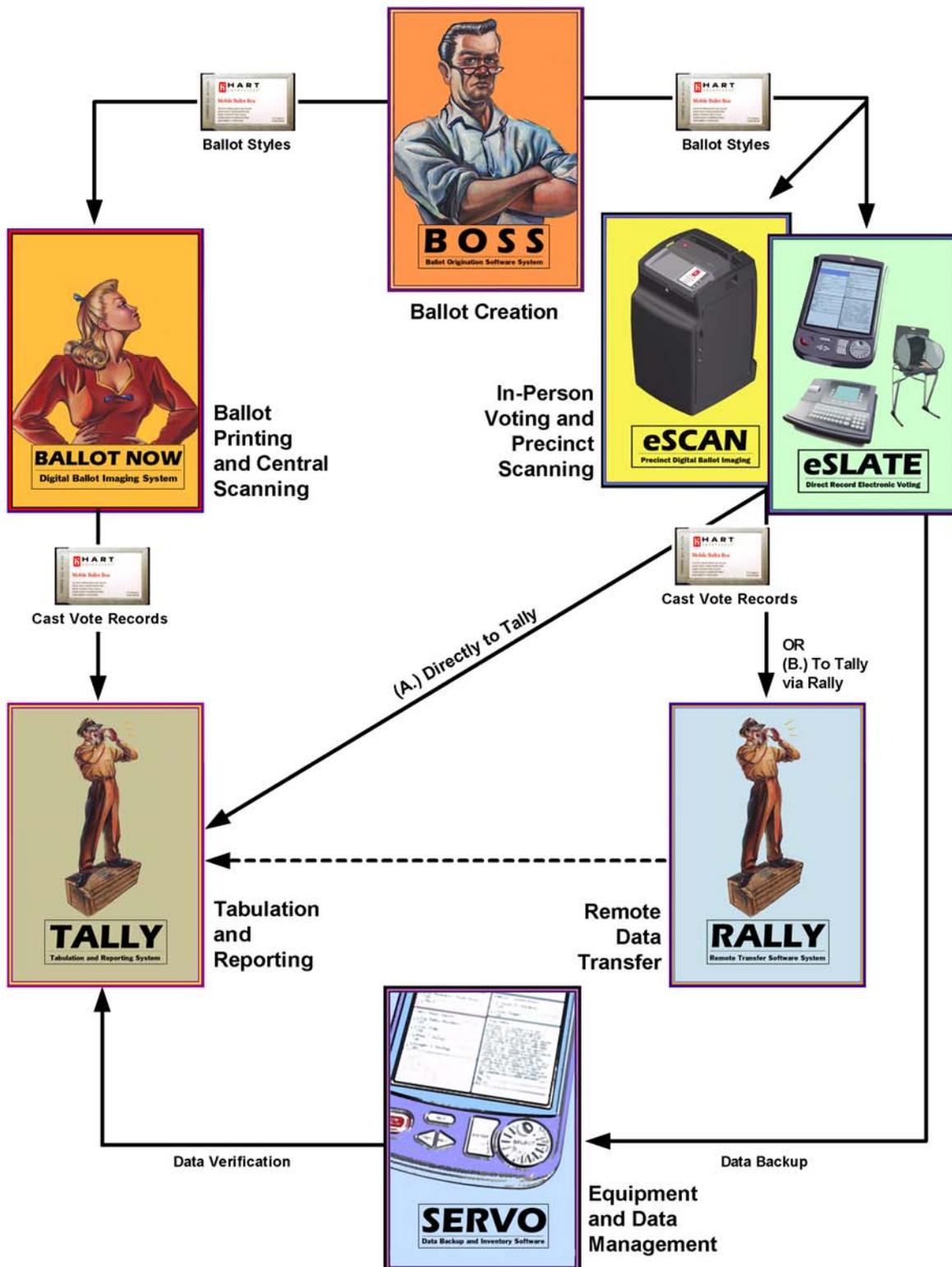
Refers to a warning or caution.

#### ***Ballot Now Operator Course Objectives***

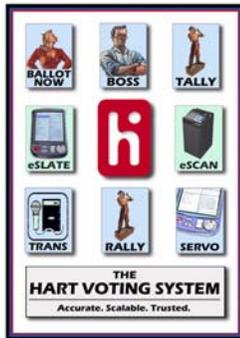
In the course associated with this document, you will:

- Print paper ballots using an MBB generated in BOSS
- Run voted paper ballots through the Ballot Now scanner
- Resolve unresolved contests
- Write the scanned cast vote records back to the original election MBB
- Prepare the CVRs for Tally vote-tabulating software
- Collect information and suggestions for paper ballot procedures and processes with Ballot Now

# Hart Voting System Data Flowchart

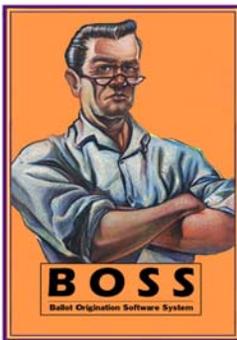


# Hart Voting System Security Features

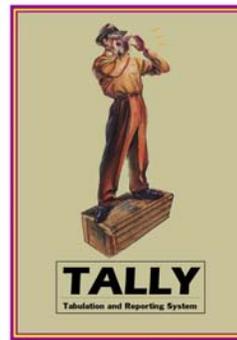


## SECURITY FEATURES

- Critical data is encrypted
- An eCM is required for crucial functions
- Two-factor authentication is required
  1. Something you have - an eCM
  2. Something you know - the PIN
- A matching signing key is required
- Secure Sockets Layer (SSL) certificates are applied whenever communications between applications occurs
- User actions are logged in persistent audit trails
- Passwords are never stored "in the clear"
- There are no covert channels of access



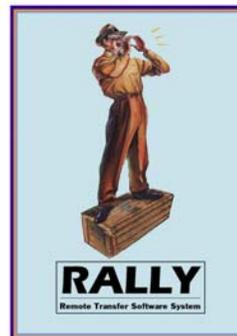
- eCM required to accept generated ballot
- Signing key written to MBB



- eCM required to read first MBB per session
- SSL certificate required to communicate with Rally



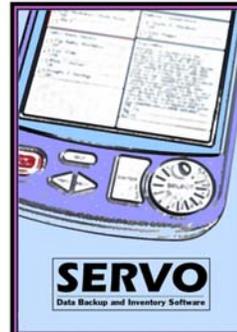
- eCM required to read or close MBB
- SSL certificate required for client-server communication



- eCM required to read first MBB per session
- SSL certificate required to communicate with Tally

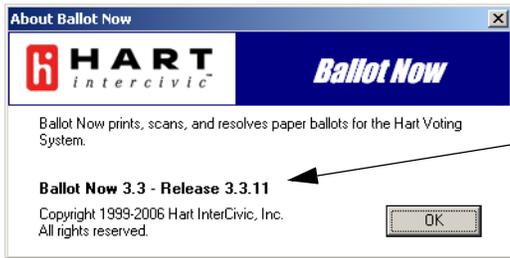


- Signing key from JBC and eScan must match MBB
- Start-up, Open Polls, Close Polls, and Admin passwords required

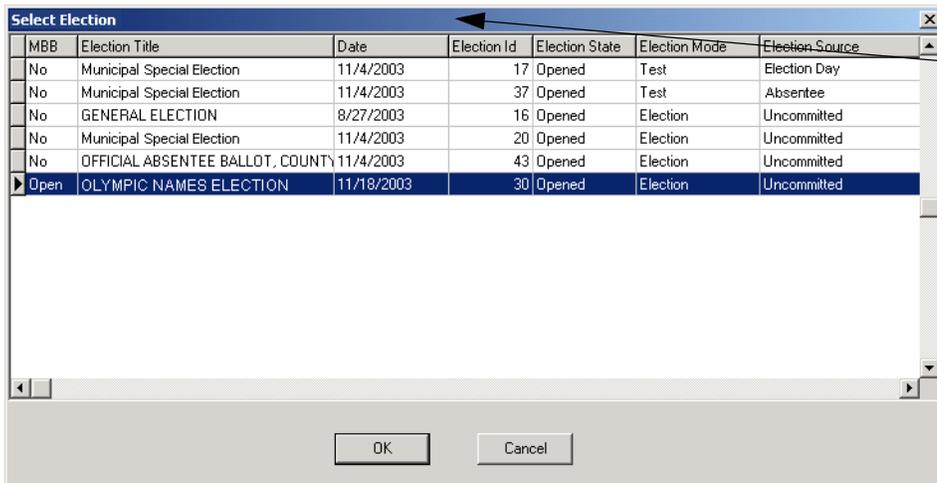


- eCM required to:
- Transfer signing key to each JBC and eScan
  - Create Event
  - Create Recount MBB
  - Create Recovery MBB

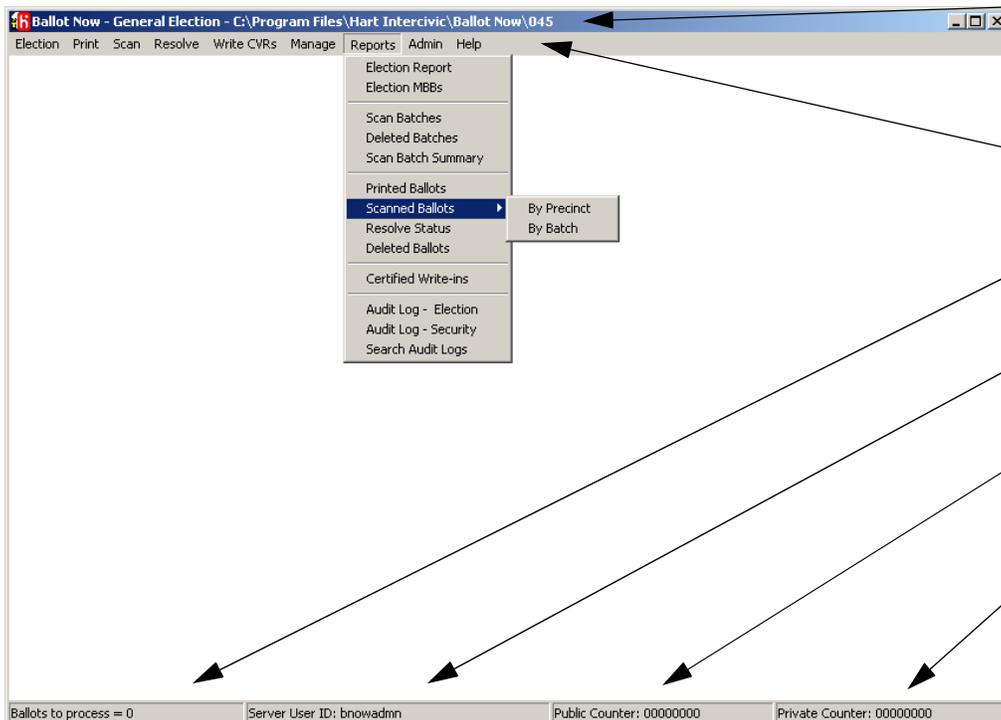
# Ballot Now Windows



- **About Ballot Now** window showing the application version information
- *If the Release number does not match your state-certified version, contact Hart InterCivic immediately.*
- *If the words "Not Certified" display, contact Hart InterCivic immediately.*



- **Select Election** window, listing available elections and status

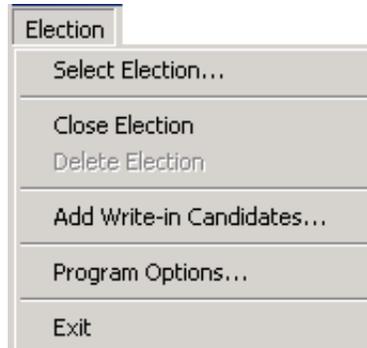


- **Ballot Now** window with title bar displaying the election title (from BOSS) and database path
- Menu Bar
- Number of ballots in the BNIP processing queue
- "Server" or "Client" status and User ID
- Public Counter of Cast Vote Records written to an MBB for this election
- Private Counter of Cast Vote Records processed on this PC for this install of Ballot Now

## Ballot Now Menus

These menus are available in the Ballot Now menu bar.

### *Menus available from the Ballot Now window*



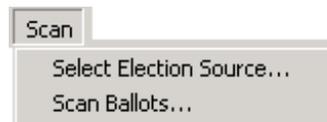
#### **Election Menu**

- Select Election from database list
- Close Election
- Delete (closed) Election
- Add "certified" write-in names for recognition in resolution process
- Choose **Program Options** for printing, scanning, and resolving
- Exit Ballot Now



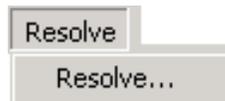
#### **Print Menu**

- Print sample, test, or Election ballots



#### **Scan Menu**

- Set batch source as Absentee, Early Voting, or Election Day
- Scan test and election ballots



#### **Resolve Menu**

- Resolve unresolved ballots



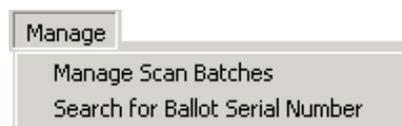
#### **Review Menu**

Review Resolve Window after closing election with closed MBB present



#### **Write CVRs Menu**

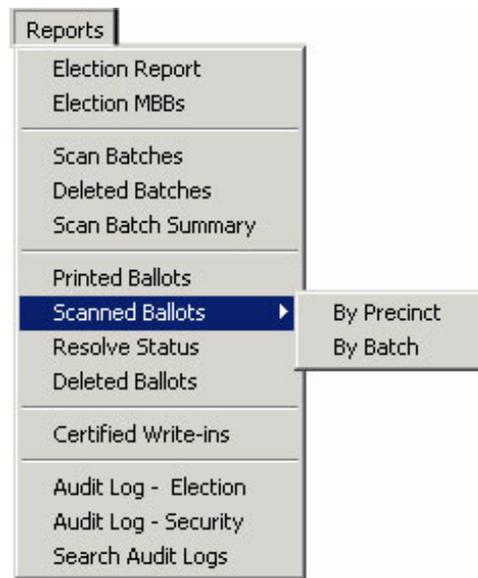
- Write resolved batches of ballots to an MBB (write "Cast Vote Records")



#### **Manage Menu**

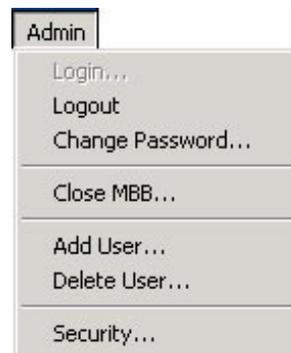
- Manage batches
- Search for ballots by serial number

## More menus available from the *Ballot Now* window



### Reports Menu

- Access Ballot Now reports



### Admin Menu

- Login and logout
- Change current user password
- Close MBB prior to going to Tally
- Manage users and permissions
- Manage digital certificates



### Help Menu

- Launch Adobe Acrobat Reader to view the *Ballot Now Operations Manual*
- Access Ballot Now version number and copyright information

## Menus with shortcuts available from the Resolve Ballot window

Ballot		
	Check Out	Ctrl+O
	Check In	Ctrl+I
	Autoresolve Ballot or Batch	Ctrl+A
	Autoresolve All Batches	Ctrl+Alt+A
	Next Ballot	Ctrl+N
	Undo all changes	Ctrl+U
	Print	Ctrl+P
	Close	Ctrl+F4

### Ballot Menu

- Check Out ballot or batch
- Check In ballot or batch
- AutoResolve ballot or batch
- Go to next ballot
- Undo all changes to ballot
- Print ballot with bar codes blacked out
- Close **Resolve Ballot** window

Window		
	Zoom In	Ctrl+Z
	Fit To Window	Ctrl+Alt+Z

### Window Menu

- Zoom in view of ballot
- Fit ballot to window

Legend		
	View Legend	Ctrl+L

### Legend Menu

- Open **Legend** window with key to resolution color-coding and explanations

## Menus with shortcuts available from the Contest window

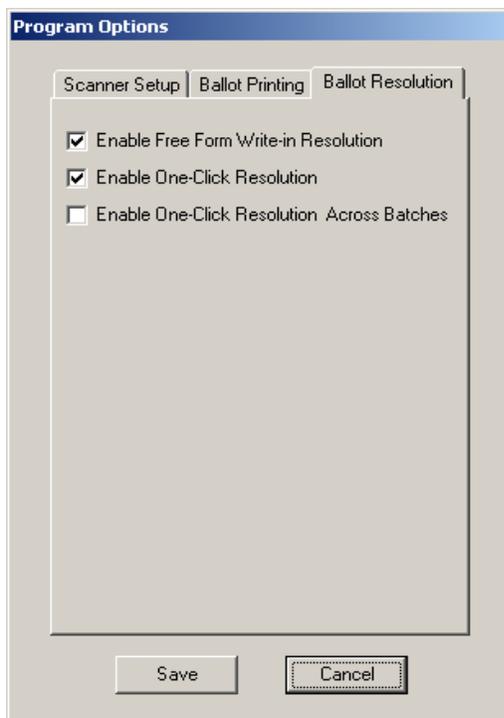
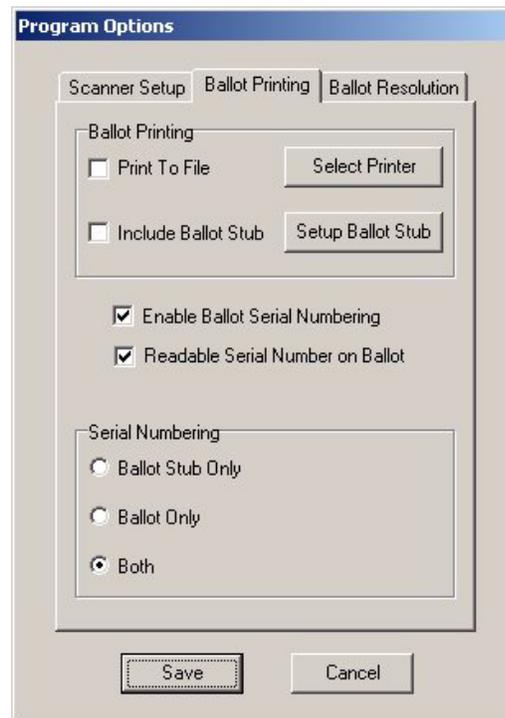
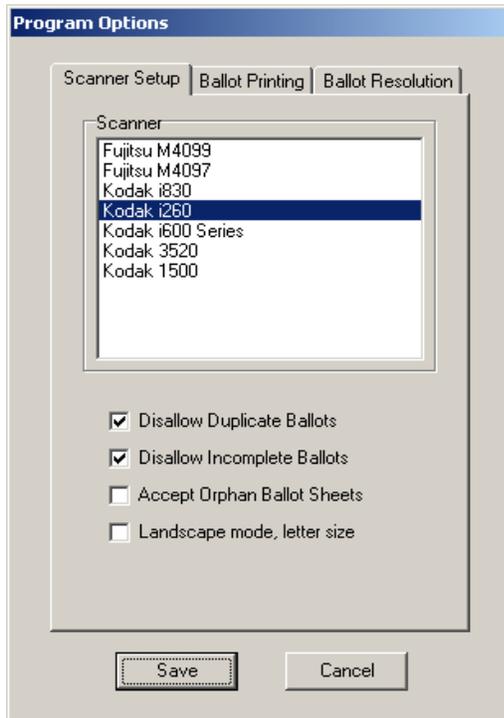
Contest		
	Confirm Contest	Ctrl+C
	Resolve Write-in	Ctrl+W
	Protect From Autoresolve	Ctrl+P
	Save	Ctrl+S
	Next Contest	Ctrl+N
	Next Ballot	Ctrl+B
	Undo Changes	Ctrl+U
	Close	Ctrl+F4

### Contest

- Confirm selected contest as indicated
- Resolve write-in candidates
- Protect selected contest from AutoResolve actions
- Save changes to selected contest
- Go to next contest or ballot
- Undo changes to the selected contest
- Close selected contest window

## Ballot Now Program Options

Go to the **Election** menu and click **Program Options**. The **Program Options** window includes three tabs where you can set options for scanning, printing, and ballot resolution.



### See:

“Appendix F: Paper Weights and Scanner Throughput” on page 127.

### Note:

Ballot serial numbers cannot be traced to the voter.

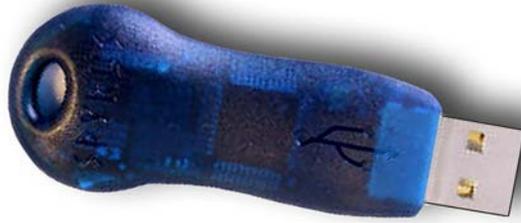
When you select the **Enable Free Form Write-in Resolution** checkbox on the **Ballot Resolution** tab, operators who are resolving ballots can assign write-in votes to candidates not in the **Add Write-In Candidates** list.

## Maximum Number of Characters for Fields in Ballot Now

The following table lists the maximum number of characters allowed in Ballot Now window data entry fields (organized alphabetically by window, then field).

<b>Window Name:</b>	<b>Field Name:</b>	<b>Maximum Characters:</b>
Add User	Password	12 (minimum 6)
Add User	User ID	12 (minimum 6)
Add Write-In Candidates	Add Write-In Candidate	60
Administer Batch	Edit Batch Notes	100
Ballot Serial Number Search	Serial Number to Search For	8
Ballot Stub	Ballot Label	40
Ballot Stub	Signature Line	80
Ballot Stub	Stub Instructions	80
Certificate	Name	64
Certificate	Organization	64
Certificate	City	100
Certificate	State	100
Resolve Write-in	Free Form Write-In	60
Scan Ballots	Enter Scan Batch Notes (optional)	100

## Ballot Now Tasks Requiring the eSlate Cryptographic Module (eCM)



### **What is the eCM?**

The eCM is a physical USB security device provided by Hart InterCivic. It is required for access to secure functions in the BOSS, Ballot Now, Tally, Rally, and SERVO applications. The eCM must be generated using the eCM Manager application.

### **When is the eCM Used?**

In a given election, the signing key on the eCM is used by the BOSS application to accept the ballot formats for the election, and a matching signing key must also be present in the eCM(s) used in the Ballot Now, Tally, Rally, and SERVO applications.

The simplest way to use an eCM is to keep the device handy (e.g., on a lanyard on your person) and to insert the eCM token into a USB port on an election PC each time that PC is being used, removing the eCM when finished. In Ballot Now, the eCM is inserted into a USB port on the stand-alone or server PC, not on the client PC.

When the eCM is accessed, Ballot Now requires the operator to enter the eCM PIN (a password chosen by a jurisdiction administrator before any signing keys are generated).

In Ballot Now, the eCM is used to:

- Read any MBB (Select Election)
- Close an MBB
- Close the Election with an open MBB inserted in the card reader

### **eCM Management**

The eCMs should be closely managed. The number of eCMs being used for an election and their PIN(s) should be logged in a secure location. eCMs should be labeled with the election name or similar information, but *not* with the eCM Key ID or PIN. eCMs should be stored in a secure location, separate from election MBBs.

**Notes:**

**Notes:**



# Chapter 2

## Ballot Now Application Management

### Ballot Now Database Management

Ballot Now database management includes keeping track of database status and mode; testing; understanding the database file path for CD backup; and closing and deleting unnecessary election databases.

#### Database Naming Conventions

The **Select Election** window and the **Ballot Now** window title bar both display the BOSS database **Election Title** field. You cannot rename a Ballot Now database or its description.

The Ballot Now **Select Election** window displays the following information:

MBB	Election Title	Date	Election Id	Election State	Election Mode	Election Source
No	Municipal Special Election	11/4/2003	17	Opened	Test	Election Day
No	Municipal Special Election	11/4/2003	37	Opened	Test	Absentee
No	GENERAL ELECTION	8/27/2003	16	Opened	Election	Uncommitted
No	Municipal Special Election	11/4/2003	20	Opened	Election	Uncommitted
No	OFFICIAL ABSENTEE BALLOT, COUNTY	11/4/2003	43	Opened	Election	Uncommitted
Open	OLYMPIC NAMES ELECTION	11/18/2003	30	Opened	Election	Uncommitted

Column Label:	Content Description:
MBB	MBB status - No (not present), Open, or Closed
Election Title	Election Title from BOSS ( <i>not</i> BOSS Database Description)
Date	Election Day date from BOSS
Election Id	Election ID from BOSS used on Ballot Now database folder
Election State	Election State in Ballot Now - Opened or Closed
Election Mode	Election Mode from MBB type - Test or Election
Election Source	Election Source tagged for this MBB - Absentee, Early Voting, or Election Day This will display only after CVRs have been saved to the MBB.

## Election (Database) State

A Ballot Now election can be closed with or without the presence of an MBB. In order to close an election, all scan batches must have been resolved and saved to the MBB. The Ballot Now “Election State” is not the same as the MBB state. An MBB can also be in an open or closed state.

<b>Status:</b>	<b>Availability:</b>
Opened	In this state, the database is available to write Cast Vote Records (CVRs) to a Mobile Ballot Box (MBB).
Closed	In this state, the database is not available to write CVRs to an MBB. The database is available to delete.

## Database Mode

<b>Mode:</b>	<b>Availability:</b>
Test	Initialized from a Test Mode MBB. Ballot Now will print and scan ballots marked “Test”. Ballot Now will print ballots marked “Sample”. This database is separate from the Election mode database, and shares the ID number followed by a “T”.
Election	Initialized from an Election Mode MBB. Ballot Now will print and scan live election ballots. Ballot Now will print ballots marked “Sample”. This database is separate from the Test mode database.

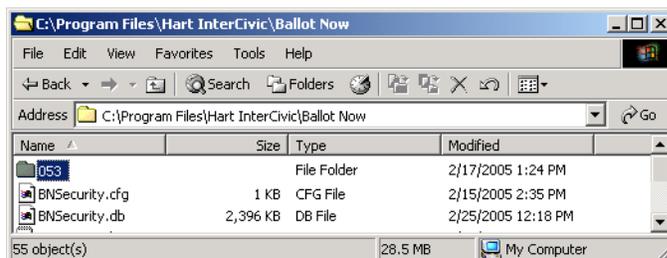
## Testing

Logic and Accuracy testing (L&A, or LAT) is testing of the accuracy of the tabulation system compared to the input on the voting device. Logic and accuracy testing should take place before going live with an election, including Early and Absentee voting. Follow federal, state, and local guidelines for logic and accuracy testing. Refer to the Tally and Support Procedures documents for more information on logic and accuracy testing and functionality testing (testing of the hardware functionality). Logic and accuracy testing is done from the BOSS ELECTION database that will be used for the live election and the Tally TEST database.

Functionality testing is testing of the equipment, including scanner maintenance and cleaning. Perform a functionality test before each election cycle. Refer to the *Hart Voting System Support Procedures Training Manual* for a checklist to guide Ballot Now functionality testing. Refer to the scanner manufacturer’s documentation for scanner maintenance and cleaning information.

## Database File Path

The Ballot Now database folder is located at “C:\Program Files\Hart Intercivic\Ballot Now\###” (three-digit Election ID number). Identify the (BOSS) Election ID in the **Select Election** window (by going to the **Election** menu and clicking **Select Election**) and/or in the “Election Report”. Test databases also append the Election ID with a “T”. The Ballot Now database in the folder is named “BallotNow.db”.



## Backing Up Ballot Now Databases

When backing up a Ballot Now database to CD, refer to the database “Election ID” in the **Select Election** window. This ID number is also viewable in the “Election Report”. Follow the directory path to the folder with this Election ID (C:\Program Files\Hart Intercivic\Ballot Now\###). Back up the entire folder. In addition, back up the BNsecurity.db and BNsecurity.cfg files in the “Ballot Now” folder. Ballot Now does not include a “backup” or “archive” function within the application.

Back up the numbered Ballot Now database folder and BNsecurity.db and BNsecurity.cfg files:

- At any time before closing the election (optional)
- After closing the election.

**See:**

“Appendix D: Backing Up Election Databases” on page 123.

## Deleting Ballot Now Databases

Ballot Now databases (elections) must be in a “Closed” state before they can be deleted. Delete Ballot Now databases that were used for practice purposes.

Once an election is completed, after an appropriate (federally or locally mandated) waiting period has passed, and after the Ballot Now database has been backed up, you can delete an election database to save hard drive space on the PC. You do not need an MBB to delete an election database.

### Deleting a Closed Ballot Now Election (Database)

1. Log in to Ballot Now as an Administrator-level user.
2. With or without the MBB card in the card device, select the election and note the (BOSS) Election ID in the **Select Election** window (also viewable in the “Election Report”).
3. Go to the **Election** menu and click **Delete Election**.
4. Follow the prompts to delete the election. (If MBB was not closed and is present in the card device, the eCM PIN is required.)
5. If instructed to do so (see messages below), exit Ballot Now, navigate to the directory for the database, and delete the folder with the correct Election ID for this database. If necessary, restart the PC and retry.



## Ballot Now MBB Management

Store MBBs in a safe location separate from election eCMs when not using the Ballot Now PCs.

### MBB Status

Ballot Now MBBs can have an “Open” or “Closed” status, regardless of the status of the Ballot Now election.

- “Open” MBBs are available for writing CVRs and will elicit a warning message if taken to Tally.
- “Closed” MBBs are not available for writing CVRs and will not elicit a warning message in Tally.
  - To close MBBs before taking them to Tally:
    - a. Insert an eCM for the election into a USB port on the PC.
    - b. Go to the **Admin** menu and click **Close MBB**.
    - c. Follow prompts to enter the eCM PIN and close the MBB.
    - d. Mark closed MBB labels as “closed”.

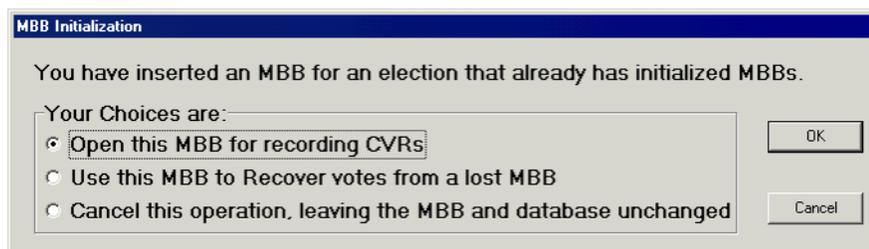
### MBB Source

- Ballot Now MBBs must be identified by source as Absentee, Early Voting, or Election Day.
- Scan batches must also be identified by source as Absentee, Early Voting, or Election Day.
- The default scan batch source when first initializing the election is “Absentee”.
- The batch source setting is persistent to an election database. Batch source designation remains at the selected setting for all batches in that election database until you manually change the source identification option.
- Batches can only be written to MBBs identified for the same source type.
- You can redefine the scan batch source in the **Scan Batch Management** window only *before* CVRs are saved to MBB.
- Once an MBB’s source has been designated, you cannot change it.

### Incremental MBBs

Ballot Now MBBs can be incremental, meaning that a Ballot Now MBB can be taken to Tally with only a portion of an election’s scanned batches, while another MBB is initialized to write additional Cast Vote Records for that election (from late mail, for example). Before taking a Ballot Now MBB to Tally, close each MBB.

1. Write CVRs for all targeted batches going to Tally. Go to the **Write CVRs** menu and click **Write Cast Ballots to MBB**.
2. Go to the **Admin** menu, click **Close MBB**, and follow prompts to close the MBB.
3. Go to the **Election** menu and click **Select Election** (or exit Ballot Now) before removing the MBB from the card device. Otherwise, removing the MBB once the election has been selected with the MBB inserted forces the user out of the Ballot Now application.
4. After removing and labeling the MBB, insert a blank MBB formatted for the same election. In the **MBB Initialization** window that appears select **Open this MBB for Recording CVRs** and click **OK**.



### Tasks that Require an MBB

A Ballot Now MBB is accessed from the server or stand-alone PC only. An election database must first be initialized in Ballot Now with an MBB. Once the Select Election process is performed with the MBB in the card device, the Ballot Now application will close if the MBB is removed. If the Select Election process is performed without the MBB in the card device, then limited tasks are available (Read Only mode). The following table identifies tasks that do and do not require an MBB in the card device:

<b>Task:</b>	<b>MBB Required?</b>
Close MBB	Yes
Initialize Election Database	Yes
Initialize MBB	Yes
Print Ballots	Yes
Resolve Ballots	Yes
Scan Ballots	Yes
Select Election Source for Write to MBB	Yes
Set Election Source	Yes
Write Cast Ballots to MBB	Yes
Add Certified Write-Ins	No
Add/Delete User	No
Change Password	No
Change Program Options	No
Close Election	No
Delete Election	No
Log In	No
Log Out	No
Manage Scan Batches	No
Search for Ballot by Serial Number	No
Select Election <sup>a</sup>	No
View/Print Reports	No

a. If an MBB is not present, the election will be opened in "Read Only" mode and limited functionality is available.

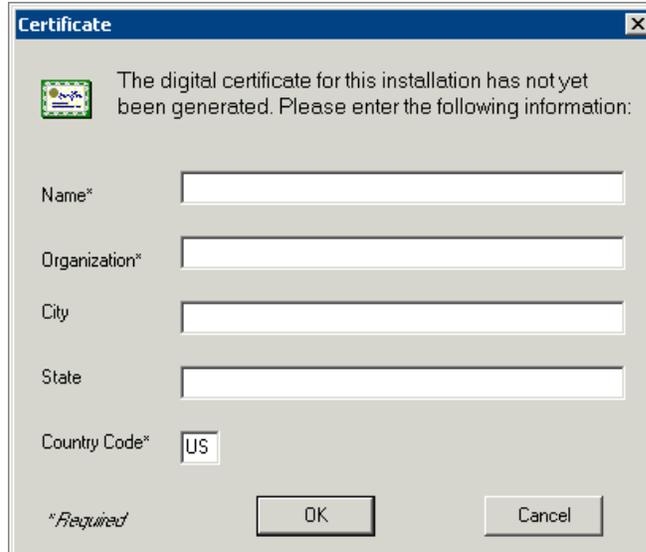
**See:**

The *Ballot Now Operations Manual* for a more complete listing of tasks organized by user permission level and server/client PC identification.

## Managing Ballot Now User Permissions

### First Login After Installation of Ballot Now

Complete the following steps at the first startup of Ballot Now after installation. If Hart InterCivic has already completed them during installation and testing, then create local users and permissions and delete those users added during installation and testing.



The dialog box titled "Certificate" contains the following text and fields:

The digital certificate for this installation has not yet been generated. Please enter the following information:

Name\*

Organization\*

City

State

Country Code\*

\* Required

Buttons: OK, Cancel

1. Start Ballot Now from either the desktop shortcut or **Start/Programs/Hart InterCivic/Ballot Now** on the Windows taskbar.
2. Complete the certificate that displays and click **OK**. The certificate is used to verify a trusted connection (as with a client-server setup). Enter a unique password or an administrator-level User ID in the certificate **Name** field. Log certificate information.

**See:**

"Managing Ballot Now Certificates" on page 21.

3. Add an Administrator-level user:



The dialog box titled "Add User" contains the following fields and options:

User ID

Password

Reenter Password:

Permission Level

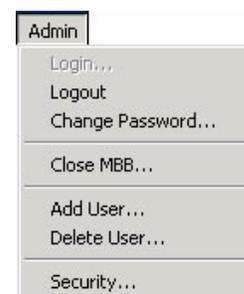
Administrator

Buttons: OK, Cancel

- a. In the **User ID** field, enter a User ID for a user who will have Administrator-level permissions in Ballot Now. The field limit is 6 - 12 letters or numbers, case sensitive.
- b. In the **Password** and **Reenter Password** fields, enter the password for the Administrator-level user. The field limit is 6-12 letters or numbers, case sensitive.
- c. Click **OK**.

## Managing Additional Users

- To create additional users, go to the **Admin** menu and click **Add User**.
- In the **Add User** window, add new users with appropriate permission settings and click **OK**. (The field limit is 6 - 12 letters or numbers, case sensitive.)



- > Users currently logged in can change their passwords by going to the **Admin** menu and clicking **Change Password**.
- > Administrator-level users can delete users by going to the **Admin** menu and clicking **Delete User**.
- > Users cannot view passwords.

## Ballot Now User Permissions

<b>Ballot Now Functions:</b>	<b>Administrator:</b>		<b>Operator:</b>		<b>Resolution Board:</b>	
	<b>Server</b>	<b>Client</b>	<b>Server</b>	<b>Client</b>	<b>Server</b>	<b>Client</b>
Add "Certified" Write-ins	Yes	Yes	Yes	Yes	No	No
Add/Delete User	Yes	Yes	No	No	No	No
Change Password	Yes	Yes	Yes	Yes	Yes	Yes
Change Program Options	Yes	No	Yes	No	No	No
Close Election	Yes	No	No	No	No	No
Close MBB	Yes	No	No	No	No	No
Delete Election	Yes	No	No	No	No	No
Log In	Yes	Yes	Yes	Yes	Yes	Yes
Log Out	Yes	Yes	Yes	Yes	Yes	Yes
Manage Scan Batches	Yes	Yes	No	No	No	No
Perform MBB Initialization	Yes	No	No	No	No	No
Print Ballots	Yes	No	Yes	No	No	No
Resolve Ballots	Yes	Yes	No	No	Yes	Yes
Scan Ballots	Yes	No	Yes	No	No	No
Search for Ballot by S/N	Yes	Yes	No	No	No	No
Select Election	Yes	Yes	Yes	Yes	Yes	Yes
Select Election Source for Write to MBB	Yes	No	No	No	No	No
Set Election Source	Yes	No	Yes	No	No	No
View/Print Reports	Yes	Yes	Yes	Yes	No	No
Write CVRs to MBB	Yes	No	No	No	No	No

## Ballot Now Client-Server Management

Ballot Now can operate in stand-alone mode or in a closed network client-server setup. In a client-server setup, it is best practice to run the Ballot Now Server on one PC, and run Ballot Now Clients for resolution and Ballot Now Image Processors on up to two attached PCs. If you have more PCs connected, you can run up to three more as Ballot Now Clients for resolution. There are no client-server settings to manage in a stand-alone setup.

When operating Ballot Now in a client-server setup, follow these start-up steps:

1. Start up the Ballot Now scanner, then the server and client PCs.
2. On the server PC, open the Ballot Now application and log in.
3. On the client PC(s), open the Ballot Now application and log in with a separate User ID.
4. From the client PC(s), verify the server IP address, if prompted to do so:
  - > Physically go to the server PC and go to **Start/Run**.
  - > In the **Open** field, type "cmd" and click **OK**.
  - > In the window that opens, type "ipconfig".



```

C:\WINNT\system32\cmd.exe
Microsoft Windows 2000 [Version 5.00.2195]
(C) Copyright 1985-2000 Microsoft Corp.

C:\Documents and Settings\trainingadm>ipconfig

Windows 2000 IP Configuration

Ethernet adapter Local Area Connection:

    Connection-specific DNS Suffix  . : 
    IP Address . . . . . : 172.20.10.45
    Subnet Mask . . . . . : 255.255.0.0
    Default Gateway . . . . . : 172.20.0.1

C:\Documents and Settings\trainingadm>
  
```

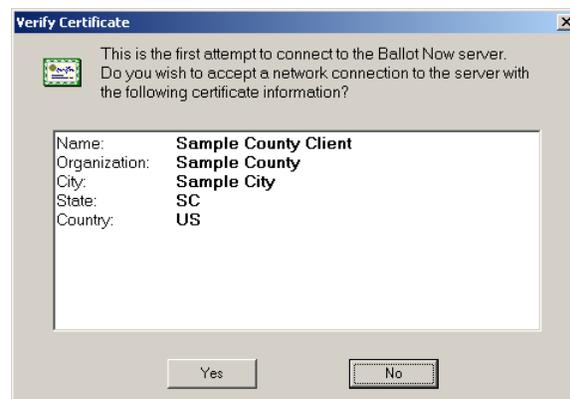


- > Note the IP address that reports and then close the window.
- > Return to the client PC(s), enter the server IP address in the Ballot Now Server IP window (or confirm that it is correct), and then click **Update**.

### Note:

Do *not* click the **Set localhost** button.

5. From the server PC, verify the client security certificate, if prompted to do so, by reading it and clicking **OK**.
6. From the client PC(s), verify the server security certificate, if prompted to do so, by reading it and clicking **OK**.
7. If using client PC(s) as Ballot Now Image Processors (BNIP) during scanning, minimize the Ballot Now application on the client PC(s) and shut down BNIP on the server PC.
8. From the server PC, select the election by going to the **File** menu and clicking **Select Election**.



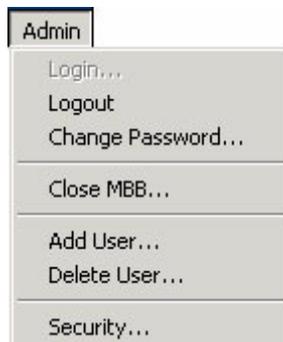
### Note:

Client users can log in either before or after the election has been selected on the server.

9. From the client PC(s), select the election by going to the **File** menu and clicking **Select Election**.
10. Proceed to print, scan, and resolve ballots.
  - > All printing and scanning functions are performed from the server PC.
  - > The client PC(s) have resolve functions available.
  - > The server PC can print and scan while client PCs are being used for resolution.

## Managing Ballot Now Certificates

1. Certificates must be separately managed by an Administrator-level user on each Ballot Now PC.
  - > A second Administrator-level user must be added in order to open the **Ballot Now Security Management** window on the client PC while an administrator is logged in on the server PC.
2. To manage certificates, go to the **Admin** menu and click **Security**.



3. In the **Ballot Now Security Management** window, click **Edit Local Certificate** in order to change content in the certificate for the Ballot Now application on the local PC. In the **Certificate** window, review information and/or change content, and then click **OK**.

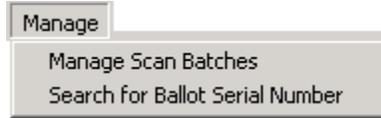


4. Click **Clear Trusted Certificates** in order to clear previously accepted certificates from a networked PC.
5. The footer of the **Ballot Now Security Management** window indicates the current number of accepted trusted certificates residing on the local PC.
6. Click **Close** to exit the **Ballot Now Security Management** window.

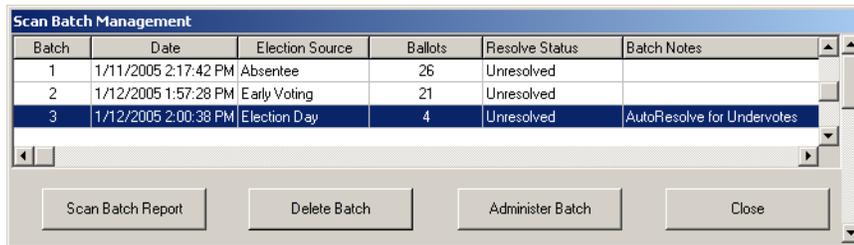
## Managing Ballot Now Scanned Batches and Ballots

### Scan Batch Management

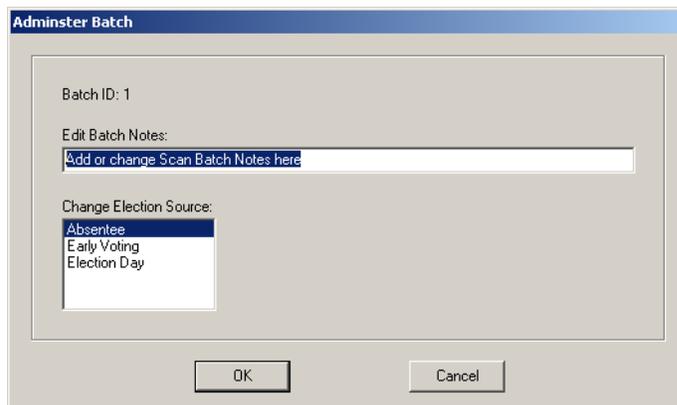
1. To use scan batch management features, go to the **Manage** menu and click **Manage Scan Batches**.



2. To view a “Scan Batch Report”, highlight a scan batch from the list and click **Scan Batch Report**.
  - > This feature is useful if an operator neglected to print a “Scan Batch Report”, for instance (also available in the **Reports** menu).
3. To delete a batch, highlight a scan batch from the list and click **Delete Batch**.
  - > Follow prompts to complete deletion of the batch (i.e., the scanned ballot images). Follow local procedures for re-scanning the batch.
4. To further administer a batch, highlight a scan batch from the list and click **Administer Batch**.



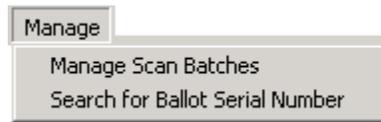
- 4.1 To add or update notes in the “Scan Batch Report”, enter notes in the **Edit Batch Notes** field of the **Administer Batch** window.



- 4.2 To change the designated source for a scan batch, highlight the updated source in the **Change Election Source** field.
- 4.3 Click **OK** to save changes and close the **Administer Batch** window.
5. Click **Close** to exit the **Scan Batch Management** window.

## Scanned Ballot Management

1. To search for ballots by serial number, go to the **Manage** menu and click **Search for Ballot Serial Number**.



2. Enter a ballot serial number in the **Serial Number to Search For** field and click the **Search Now** button.

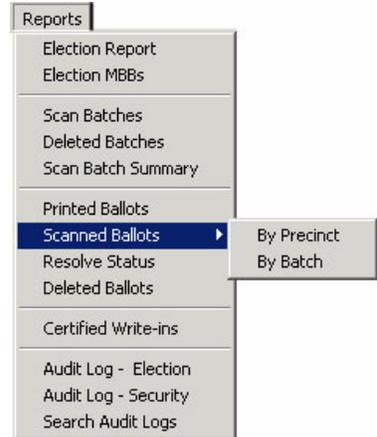
 A screenshot of a software window titled 'Ballot Serial Number Search'. At the top, there is a text input field labeled 'Serial Number to Search For' containing the number '12'. To its right is a 'Search Now' button, and further right is a 'Close' button. Below the search area are two tables. The left table, titled 'Scanned Ballots', has columns: Serial Number, Batch Number, Sequence Number, Precinct, Election Source, Resolved, and Written to MBB. It contains one row with values: 12, 1, 25, 9, Absentee, No, No. The right table, titled 'Processing Queue', has columns: Serial Number, Batch Number, and Locked. It is currently empty. At the bottom of the window are three buttons: 'Batch Report', 'View Ballot', and 'Delete Ballot'. A note at the bottom right states: 'If a ballot is found in the processing queue, you must wait until it is processed before it can be deleted.'

3. To view a "Scan Batch Report" highlight a line and click **Batch Report**.
4. To view a ballot image, highlight a line and click **View Ballot**.
5. To delete a ballot from a batch that has not been saved to an MBB, highlight a line and click **Delete Ballot**. Follow prompts to delete the ballot (i.e., the scanned ballot image). Follow local procedures for re-scanning the ballot.

## Audit Log Reports

There are two types of Ballot Now audit log reports. An “Election Database Audit Log” report shows actions performed within a specific Ballot Now election database (e.g., resolution actions taken by a user). The Ballot Now “Security Database Audit Log” report shows actions performed in the Ballot Now application since installation (e.g., adding users).

These reports allow a Ballot Now administrator to keep track of Ballot Now databases, and they allow Administrator-level users to identify what has been accessed/changed, by whom. To view the “Audit Log” reports, go to the **Reports** menu.



**Ballot Now Report**

Olympic Names Election - Sample County - 12/15/2005

**Election Database Audit Log - Unofficial**

Record	User ID	Date / Time	Code	Description	Detail
1	bnwadmn	12/15/2005 2:34:27 PM	88	Initialize New Election	Election ID 44, Mode Election
2	bnwadmn	12/15/2005 2:34:58 PM	5	Open Election	Election ID 44, Mode Election
3	bnwadmn	12/15/2005 2:34:58 PM	42	Voter Counters	Pub: 000000 Pvt:000000000
4	bnwadmn	12/15/2005 2:34:58 PM	43	MBB ID	MBB ID: 3, Present: YES
5	bnwadmn	12/15/2005 2:34:58 PM	45	Security DB Version	3.00.00
6	bnwadmn	12/15/2005 2:34:58 PM	46	Database Version	3.00.00
7	bnwadmn	12/15/2005 2:34:58 PM	47	Ballot Now Version	3.2.4.1
8	bnwadmn	12/15/2005 2:34:58 PM	48	BNIP Version	3.2.4.1
9	bnwadmn	12/15/2005 2:35:26 PM	87	View Report	ElectionDB AuditLog
10	bnwadmn	12/15/2005 2:35:37 PM	87	View Report	SecurityDB AuditLog
11	bnwadmn	12/15/2005 2:36:20 PM	14	Preferences	Scanner:M4097,Disallow Dups.:YES
12	bnwadmn	12/15/2005 2:36:20 PM	14	Preferences	Disallow Incomplete Ballots:YES
13	bnwadmn	12/15/2005 2:36:20 PM	14	Preferences	Use Ser.#:YES,Use Stubs:NO
14	bnwadmn	12/15/2005 2:36:20 PM	14	Preferences	SNReadable:YES,Freeform Write-in:NO
15	bnwadmn	12/15/2005 2:36:20 PM	14	Preferences	Serial Number Placement:Both
16	bnwadmn	12/15/2005 2:36:37 PM	14	Preferences	Scanner:M4097,Disallow Dups.:YES
17	bnwadmn	12/15/2005 2:36:37 PM	14	Preferences	Disallow Incomplete Ballots:YES
18	bnwadmn	12/15/2005 2:36:37 PM	14	Preferences	Use Ser.#:YES,Use Stubs:NO
19	bnwadmn	12/15/2005 2:36:37 PM	14	Preferences	SNReadable:YES,Freeform Write-in:YES
20	bnwadmn	12/15/2005 2:36:37 PM	14	Preferences	Serial Number Placement:Both

**Ballot Now Report**

Olympic Names Election - Sample County - 12/15/2005

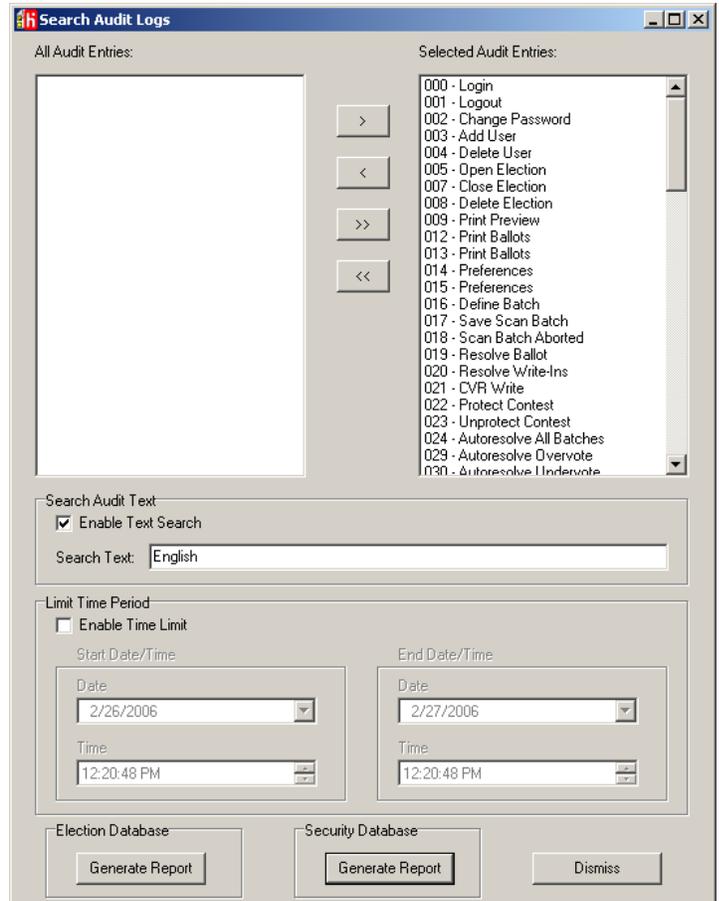
**Security Database Audit Log - Unofficial**

Record	UserID	Date	Time	Code	Description	Detail
1		12/15/2005	7:04:05 PM	3	Add User	Added: bnwadmn-A
2	bnwadmn	12/15/2005	7:04:08 PM	0	Login	Success Conn: 1
3	bnwadmn	12/15/2005	7:05:58 PM	93	eSlate Cryptographic Module	PIN OK
4	bnwadmn	12/15/2005	7:05:58 PM	93	eSlate Cryptographic Module	PIN OK
5	bnwadmn	12/15/2005	7:05:58 PM	93	eSlate Cryptographic Module	Key Data OK
6	bnwadmn	12/15/2005	7:05:58 PM	93	eSlate Cryptographic Module	Key Data OK
7	bnwadmn	12/15/2005	7:06:24 PM	90	Application Exit	
8	bnwadmn	12/15/2005	7:06:25 PM	1	Logout	Conn. 3
9	bnwadmn	12/15/2005	7:16:15 PM	0	Login	Success Conn: 1
10	bnwadmn	12/15/2005	7:16:54 PM	93	eSlate Cryptographic Module	PIN OK
11	bnwadmn	12/15/2005	7:16:54 PM	93	eSlate Cryptographic Module	PIN OK
12	bnwadmn	12/15/2005	7:16:54 PM	93	eSlate Cryptographic Module	Key Data OK
13	bnwadmn	12/15/2005	7:16:54 PM	93	eSlate Cryptographic Module	Key Data OK
14	bnwadmn	12/15/2005	7:17:13 PM	82	Add MBB to Security DB	MBB ID 1 inserted as Open
15	bnwadmn	12/15/2005	7:17:21 PM	88	Initialize New Election	Election ID 46, Mode Election
16	bnwadmn	12/15/2005	7:18:01 PM	5	Open Election	Election ID 46, Mode Election
17	bnwadmn	12/15/2005	7:18:01 PM	43	MBB ID	MBB ID: 1, Present: YES
18	bnwadmn	12/15/2005	7:18:56 PM	1	Logout	Conn. 5
19	bnwadmn	12/15/2005	7:19:42 PM	0	Login	Success Conn: 5
20	bnwadmn	12/15/2005	7:20:00 PM	1	Logout	Conn. 6

## Filtered Audit Log Reports

In order to print an audit log report specific to a user action, ballot serial number, or any other action description that would appear in the Detail field of an “Audit Log” report, go to the **Reports** menu and click **Search Audit Logs**.

1. In the **Search Audit Logs** window, use the arrow buttons to move target entry types from the **Available Audit Entries** to the **Selected Audit Entries** list.
2. If you want to search using specific text, select the **Enable Text Search** checkbox and enter the text using letters and numbers only.
3. If you want to search for entries over a period of time, select the **Enable Time Limit** checkbox and select time parameters.
4. Click **Generate Report** to search and report based on either the election database or the security database.
5. View and print the filtered report.
6. Close the report and click **Dismiss** to close the window.
  - > In this example, all audit log entry types are being searched.
  - > The text being searched for is the word “English” because the administrator is looking for all instances of audit entries in which ballots were printed in English.



Record	User ID	Date / Time	Code	Description	Detail
10	bnowadm'n	12/20/2005 12:27:27 PM	13	Print Ballots	Lang: English, Ser.#:1
20	bnowadm'n	12/20/2005 3:13:47 PM	13	Print Ballots	Lang: English, Ser.#:11
23	bnowadm'n	12/20/2005 3:22:50 PM	13	Print Ballots	Lang: English, Ser.#:21
33	bnowadm'n	12/20/2005 3:58:06 PM	13	Print Ballots	Lang: English, Ser.#:31
43	bnowadm'n	12/20/2005 4:04:51 PM	13	Print Ballots	Lang: English, Ser.#:41
79	bnowadm'n	2/24/2006 3:35:23 PM	13	Print Ballots	Lang: English, Ser.#:42
81	bnowadm'n	2/24/2006 3:35:30 PM	13	Print Ballots	Lang: English, Ser.#:52
83	bnowadm'n	2/24/2006 3:35:35 PM	13	Print Ballots	Lang: English, Ser.#:62

## An Example Ballot Now Election Process

### Elections Office Preparation - General

1. In BOSS, ensure that Ballot Now instructions for marking ballots are clear and that the correct paper size for ballots is selected before finalizing the database and writing MBBs.
2. Determine the number of MBBs needed for Ballot Now, including incremental MBBs and emergency MBBs and identify secure storage location separate from eCMs.
3. Designate one eCM per Ballot Now stand-alone or server PC and identify a secure storage location separate from MBBs.
4. Determine requirements for ballot paper stock.
  - 4.1 Consider paper weight and postage. Hart secure watermarked paper with the lower left corner cut 3/8", 70 lb. offset is recommended. If the ballots have stubs on the bottom, the same paper with the upper left corner cut 3/8" is recommended. Also order envelopes compatible with ballot paper size.

#### See:

"Appendix F: Paper Weights and Scanner Throughput" on page 127.

- 4.2 Consider fold guidelines when determining paper and envelope size. Folds should be kept to a minimum. Letter-size paper should be folded only once (fold in 1/2), if possible. Tabloid paper should be folded only twice (fold in 1/2, then in 1/2 again).
5. Determine requirements for ballot quantities. Use results by ballot style/precinct from last similar election or follow statutory requirements to determine ballot supply.
6. Print ballots to be mailed and test-scan a small percentage of the ballots at random.
7. Include an instructions flyer with ballot mailouts. Include instructions on marking the ballots with black or standard blue ink pen. Instruct voters to *completely* fill the option box.
8. Complete Ballot Now training for all Ballot Now operators, including Ballot/Resolution Board members (or their counterparts), and establish Ballot Now users and permissions.
9. Determine if "hand audit"/sort of ballots for resolution purposes is necessary and/or legally mandated, and determine hand audit guidelines.
  - 9.1 What do federal, state, and local guidelines mandate?
  - 9.2 Will ballots be hand-audited for clear undervotes and blank ballots resolvable by AutoResolve?
  - 9.3 Will ballots be hand-audited for obvious clear overvotes resolvable by AutoResolve?
  - 9.4 Will ballots with unusual marks be pulled for review or for manual resolution?

#### See:

"Part 2: How Ballot Now Reads Marked Ballots, A Reference" on page 54.

- 9.41 Overvoted straight party contests?
- 9.42 Ballots with handwriting on them?
- 9.43 Ballots with light marks or unusual marking tools used?
- 9.44 Ballots with selections circled?
- 9.45 Ballots with marks going through multiple selection boxes or with entire contests marked out?
- 9.46 Ballots with bar code marked through or otherwise damaged?
- 9.5 Will ballots not on original paper stock be pulled and not scanned at all?
10. Determine resolution decision guidelines.
  - 10.1 What will be resolved manually (not by AutoResolve)?
  - 10.2 What do federal, state, and local guidelines mandate?
  - 10.3 What defines a true undervote?
  - 10.4 What defines a true overvote?
  - 10.5 What are the voter intent issues to look for?
  - 10.6 Will "Part 4: Detailed Steps for Resolving Ballots", on page 80, be reproduced in color with voter intent notes/guidelines for "Resolution Board" member reference (recommended)?

## **Elections Office Preparation - General (continued)**

11. Set up off-site and/or print queue processes and file structure, if applicable.
12. Ensure that printers and scanners have had routine maintenance, and that replacement supplies are available.

**See:**

“Example Ballot Now Equipment and Supplies List” on page 30.

13. Determine color coding of multiple Ballot Now systems and corresponding paper for reports.
14. Organize workspace and processes.

**See:**

Ballot Now Workcenter Layout/Workflow diagrams starting on page 31.

15. (Optional) Close and delete any practice databases.
16. Determine if, and when, Ballot Now “Zero Report(s)” should be printed (“Election Report” before saving CVRs).

## **Elections Office Preparation - Sample Ballots and Logic and Accuracy Test**

1. Open Election in Ballot Now in Test Mode (Test MBB) and set source.
2. Set up the **Ballot Printing** tab in the **Program Options** window for sample ballots (i.e., disable serial numbering (S/N)).
3. Print sample ballots for the election.
4. Set up the **Program Options** for the Logic and Accuracy test (LAT). Enable S/N, disallow duplicate ballots, and either disallow incomplete ballots or accept orphan ballot sheets.
5. Print Test Ballots for Ballot Now and/or eScan LAT (including embedded eScan LAT).
6. Vote the test ballots.
7. Set up “certified” write-ins and aliases in the **Add Write-In Candidates** window.
8. Print a Ballot Now “Zero Report” (“Election Report” before saving CVRs).
9. In Ballot Now, scan LAT Test Ballots, Resolve, and Write CVRs.
10. Close the LAT election, print reports, and file Test MBB and reports with LAT documentation.
11. On the eScan, scan LAT Test Ballots and print reports.
12. Proceed to Tally for LAT tabulation.

## **Ballot Printing**

**See:**

“Ballot Now Work Center Layout/Workflow for Ballot Printing” on page 31.

1. Open Election in Ballot Now in Election Mode (Election MBB).
2. Set **Program Options** for Election ballots (enable S/N, disallow duplicate ballots, disallow incomplete ballots, accept orphan ballot sheets).
3. Print ballots for eScan and/or Ballot Now processes OR create ballot files for off-site printing.
4. Print “Printed Ballots Reports” at the end of each day.

**Note:**

If printing to file for off-site printing AND printing from a voter registration (VR) system-generated print queue, refer to the “.bno” reports to identify ballot printing output.

5. Mark MBBs with election source and “Opened”, and maintain security of MBBs.
6. Mail ballots and/or provide for in-person voting.
7. Print overstock for each precinct and file in secure storage. Use this overstock to replace damaged ballots when processing, if necessary.

## Ballot Scanning

**See:**

“Ballot Now Work Center Layout/Workflow for Ballot Scanning” on page 32.

1. Set **Program Options** for the connected scanner.
2. Clearly designate distinct areas for ballots that are “Not Yet Scanned” and “Scanned Ballots”.
  - 2.1 “Not Yet Scanned” sort stacks should include: **Received, Sorted into Batches**, and **AutoResolve for Undervotes**
  - 2.2 “Scanned Ballots” sort stacks should include: **Scanned, Rejected from Scan, Damaged/to be Replaced** (with the Replacement Ballots Log), and **For Review**.
3. Hand audit ballots for voter intent issues that will not be available for resolution in Ballot Now as per Elections Office directives.
4. Sort ballots into batches, page 1 up, about 100-250 ballots per batch, with obvious undervoted and blank ballots with no voter intent issues in undervoted contests separated into “For Undervote AutoResolve” batches (likewise for AutoResolve overvote batches, if applicable). These batches can be numbered and separated with colored paper. Weight ballot batch stacks in order to flatten folds.
5. (Optional) Set up paper jogger in order to straighten batches before sending to scanner(s).
6. Set the election source for batches.
7. Scan ballots that are **AutoResolve for Undervotes** first. Use the **Scan Batch Notes** field of the **Scan Ballots** window to identify AutoResolve batches.
  - 7.1 After scanning, print a “Scan Batch Report” on appropriate colored paper and stack ballots in a designated “Scanned Ballots” area with the correct report on top of each batch.
  - 7.2 Sort out rejected ballots. (You can either rescan immediately and set them on top of the batch they were rejected from, or set them aside to run as a separate “previously rejected” batch.)
  - 7.3 In the **Scan Complete: Batch n** window, save the scanned batch.
  - 7.4 Also, apply this sequence to **AutoResolve for Overvote** batches, if applicable.
  - 7.5 Scan remaining batches that may require manual resolution for voter intent.
  - 7.6 After scanning, print a “Scan Batch Report” on appropriate colored paper and stack ballots in a designated “Scanned Ballots” area with the correct report on top of each batch.
  - 7.7 Sort out rejected ballots. (You can either rescan immediately and set them on top of the batch they were rejected from, or set them aside to run as a separate “previously rejected” batch.)
  - 7.8 In the **Scan Complete: Batch n** window, save the scanned batch.
8. Scan previously rejected images as separate batches or sort for those needing replacement ballots with duplication of voter marks.
  - 8.1 After scanning, print a “Scan Batch Report” on appropriate colored paper and stack ballots in a designated “Scanned Ballots” area with the correct report on top of each batch.
  - 8.2 Sort out rejected ballots. (You can either rescan immediately and set them on top of the batch they were rejected from, or set them aside to run as a separate “previously rejected” batch.)
  - 8.3 In the **Scan Complete: Batch n** window, save the scanned batch.
9. For damaged or otherwise unreadable ballots, print ballots of the same style/precinct (or pull from previously printed stock) and duplicate voter marks. Complete the Replacement Ballots Log.

**See:**

“Appendix G: Paper Ballot Replacement Ballots Log and Envelope” on page 129.

- 9.1 Scan replacement ballots, noting in the **Scan Batch Notes** field of the **Scan Ballots** window that this is a replacement ballot batch.
- 9.2 After scanning, print a “Scan Batch Report” on appropriate colored paper and stack ballots in the designated “Scanned Ballots” area with the correct report on top of each batch.
- 9.3 In the **Scan Complete: Batch n** window, save the scanned batch.

**Note:**

The batch source setting is persistent. Batch source designation remains at the selected setting for all batches in the election database until the source identification option is changed manually.

Batches can only be written to MBBs identified for the same source type.

Use **Batch Notes** to identify batches that are re-scans of previously rejected ballots, replacement ballots, and/or AutoResolve batches.

**Ballot Resolution****See:**

“Ballot Now Work Center Layout/Workflow for Ballot Resolution” on page 33.

“Part 4: Detailed Steps for Resolving Ballots” on page 80.

1. (Primary elections) Set user resolution permissions and responsibilities for party-specific ballots.
2. Set up “certified” write-ins in the **Add Write-In Candidates** window, if applicable.
3. Set **Program Options** to allow free-form write-ins, if applicable.
4. For free-form write-in candidate names that appear repeatedly on ballots, enter the names as “certified” write-ins in Ballot Now. This makes the name available in a drop-down window so you don’t have to type each one.
5. Use established guidelines to determine voter intent issues.
6. AutoResolve batches identified as clear undervotes, and overvotes, as applicable.
7. If using the Ballot Now client-server setup, resolution team members at client stations should check out ballots by batch.
8. Print “Unresolved Ballot Report” at the end of each day. (It is okay to leave ballots unresolved unless you are closing the election).
9. Consider backing up the Ballot Now database to CD at the end of each day.

**See:**

“Appendix D: Backing Up Election Databases” on page 123.

10. Secure the election MBB(s) at the end of each day (Elections Office will provide secure location).
11. Repeat.

**Note:**

If a ballot is damaged to the extent that it does not scan, obtain a replacement ballot from the same precinct. Duplicate, by hand, the voter’s choices onto the replacement ballot. Write “Original. Duplicated on Ballot S/N \_\_\_\_\_” on the original ballot and write “Replacement of Ballot S/N \_\_\_\_\_” in any available whitespace on the replacement ballot.

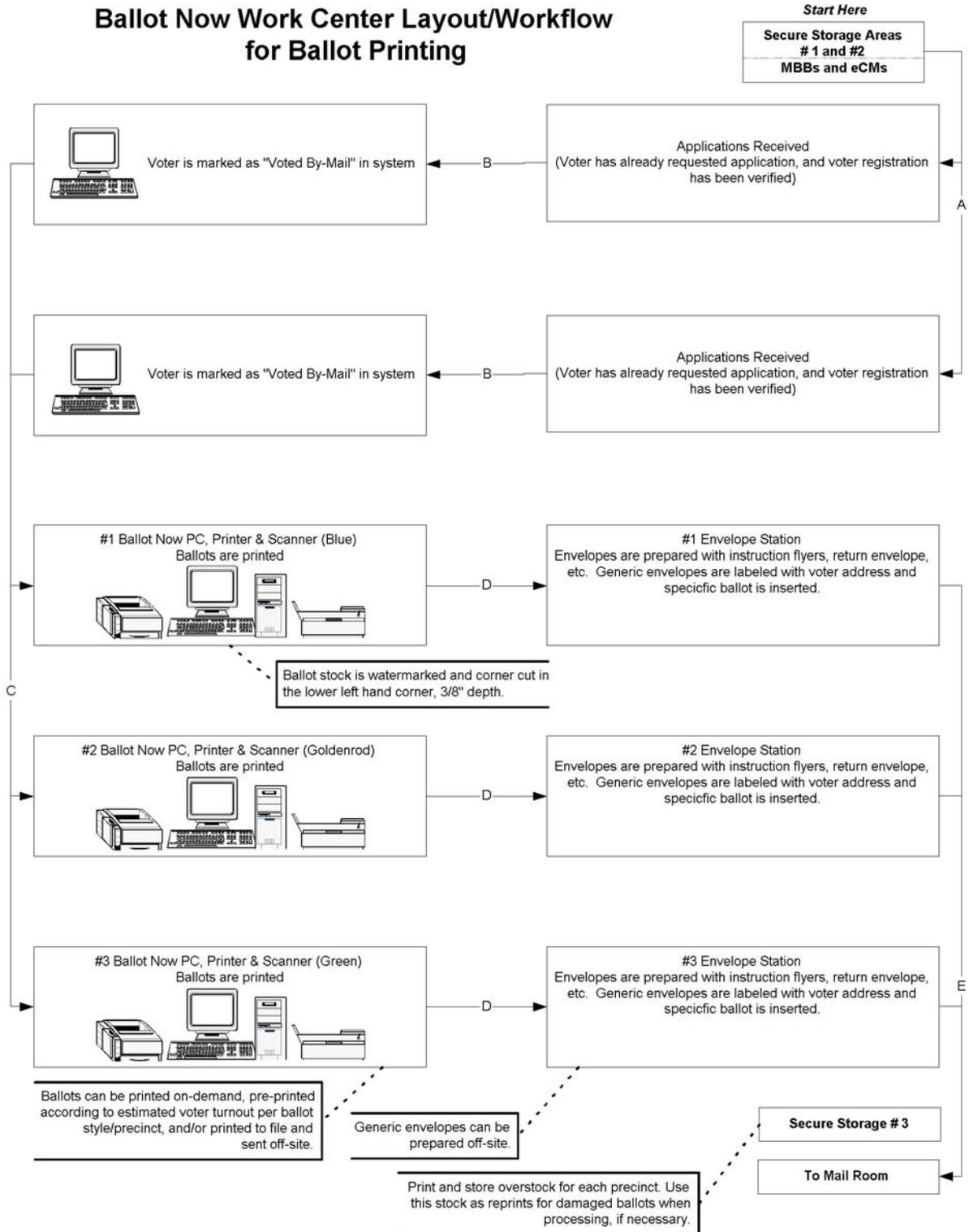
**Elections Office Preparation - Tabulation in Tally**

1. Set the MBB source, write CVRs to MBB, and close the MBB before going to Tally for tabulation.
2. Print copies of all official reports, Audit Log reports last.
3. Provide secure transfer of Ballot Now MBB(s), Official Audit Trail Reports, and Replacement Ballots Log to the Counting Station.
4. If late mail (or other late CVRs) will be processed in Ballot Now, initialize a new Election MBB for this source and process ballots.
5. Write CVRs to MBB and close the MBB before going to Tally for tabulation.
6. Print copies of all official reports, Audit Trail Reports last.
7. Provide secure transfer of Ballot Now MBB(s), Official Audit Trail Reports, and Replacement Ballots Log to the Counting Station.
8. Close the election in Ballot Now.
9. Save the Ballot Now database to CD.

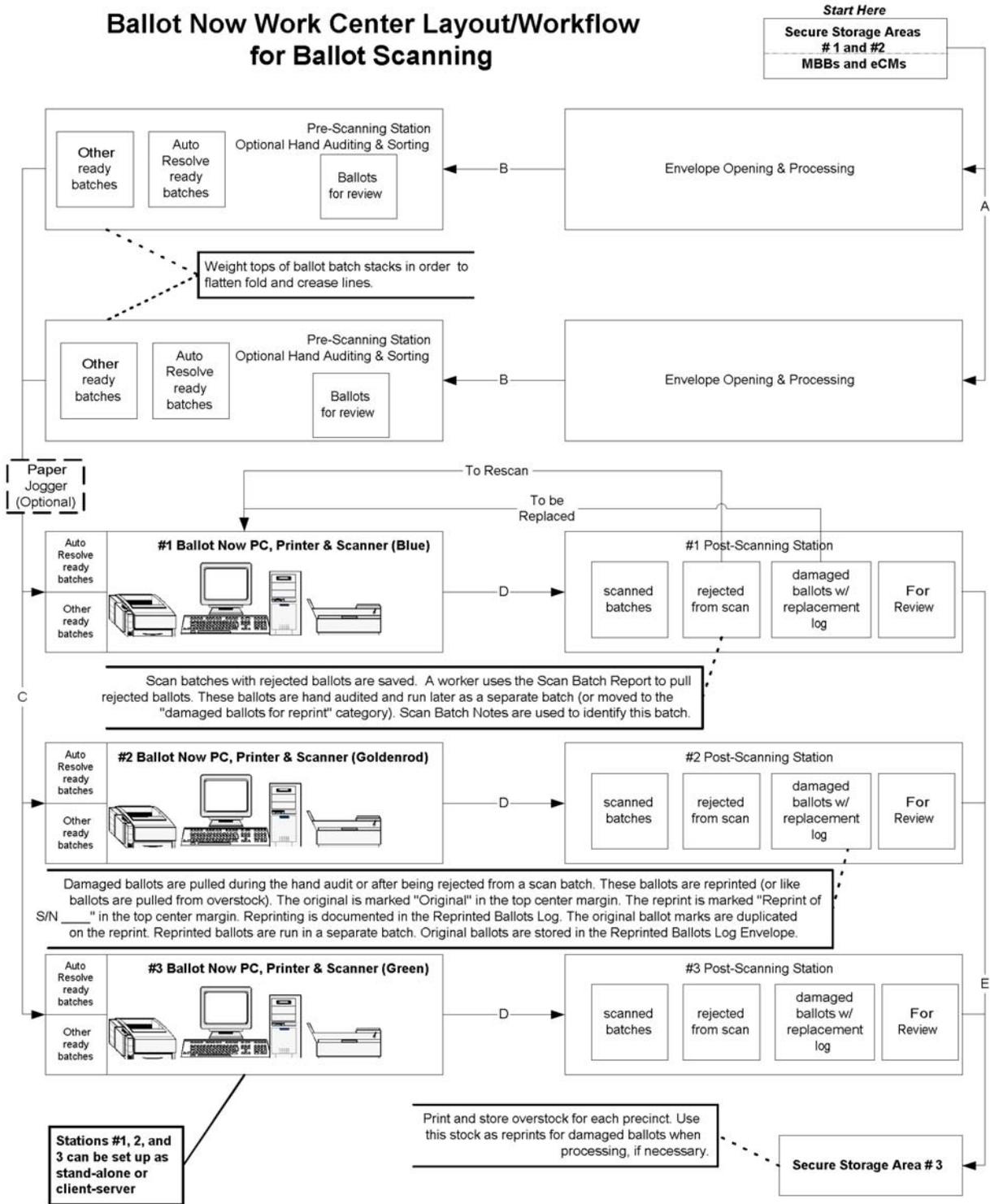
**Example Ballot Now Equipment and Supplies List**

<b>Items:</b>	<b>Details:</b>
<input type="checkbox"/> Binder clips or rubber bands for clipping “Scan Batch Reports” to each batch (quantity sufficient to organize all batches expected).	
<input type="checkbox"/> Boards (or heavy cardboard) and weights to compress ballot stacks waiting to be scanned.	This helps flatten ballots for faster, more efficient scanning.
<input type="checkbox"/> Boxes to hold scan batches.	<input type="checkbox"/> “Not Yet Scanned” sort stacks should include: <ul style="list-style-type: none"> <li>• Received</li> <li>• Sorted into Batches</li> <li>• AutoResolve for Undervotes</li> </ul> <input type="checkbox"/> “Scanned Ballots” sort stacks should include: <ul style="list-style-type: none"> <li>• Scanned</li> <li>• Rejected from Scan</li> <li>• Damaged/to be Replaced</li> <li>• For Review.</li> </ul>
<input type="checkbox"/> Paper jogger for use during scanning.	This is a simple machine that straightens a stack of paper. One jogger will keep up with several Ballot Now PC stations.
<input type="checkbox"/> Scanner cleaning kits specific to scanner model.	
<input type="checkbox"/> Spare scanner consumable kit specific to scanner model.	
<input type="checkbox"/> Sufficient tabletop and workspace for scan batch workflow.  <b>See:</b> “Ballot Now Work Center Layout/Workflow for Ballot Scanning” on page 32.	Label work areas and boxes that will hold ballots.
<input type="checkbox"/> Uniquely colored paper for “Scan Batch Reports” from each Ballot Now PC used in scanning. One unique color is recommended per Ballot Now PC.	It is easier to track batches back to one individual PC if the “Scan Batch Reports” indicate the PC each batch was processed on. Ballot Now PCs can even be color-coded and Scan Batch Notes can be used to identify PC color and batch number (Blue 32).

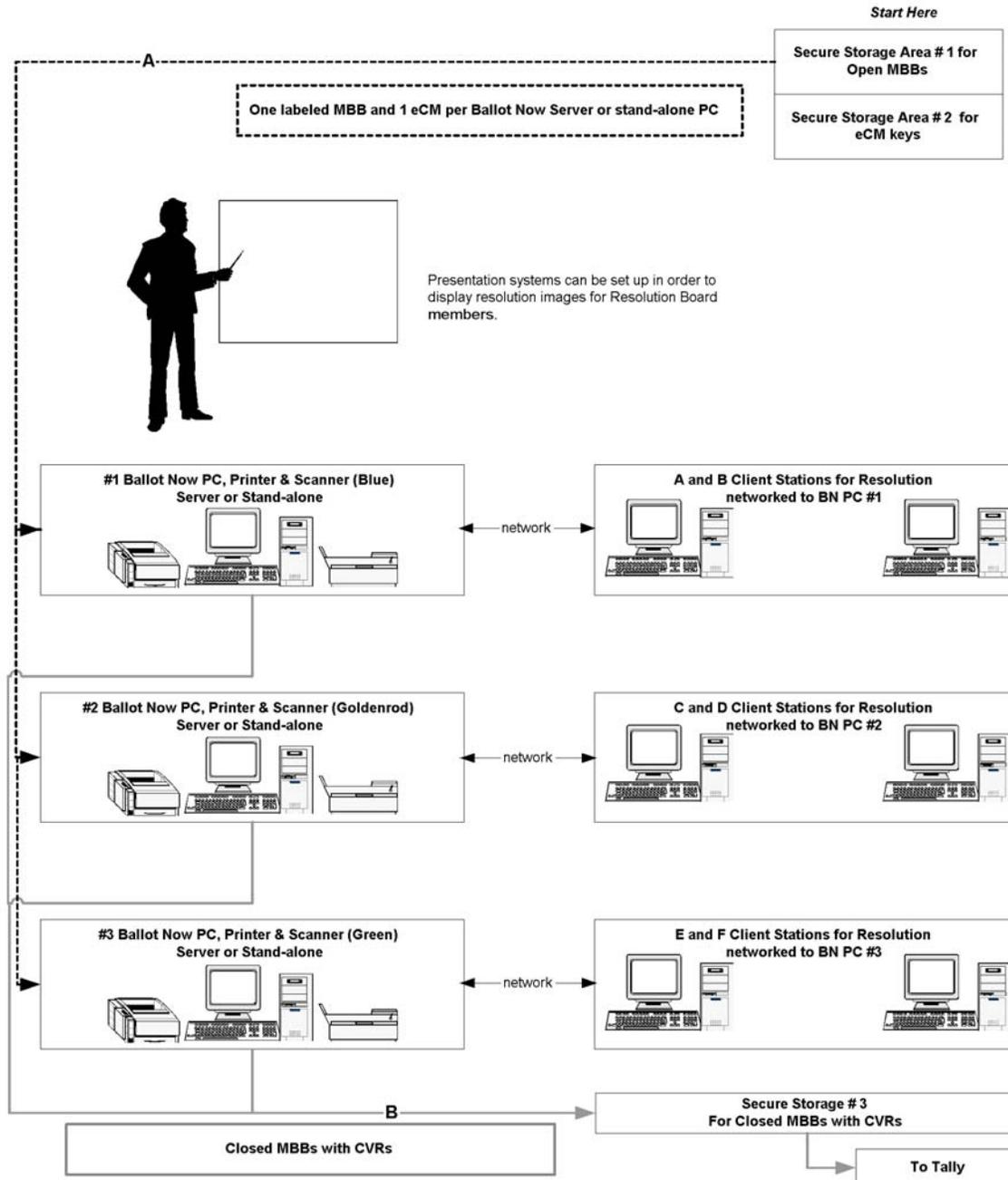
## Ballot Now Work Center Layout/Workflow for Ballot Printing



## Ballot Now Work Center Layout/Workflow for Ballot Scanning



## Ballot Now Work Center Layout/Workflow for Ballot Resolution



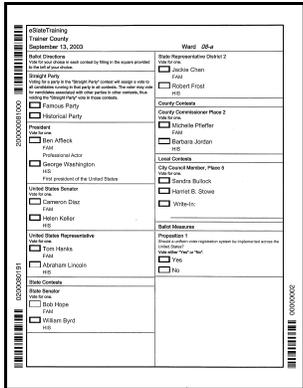
**Notes:**

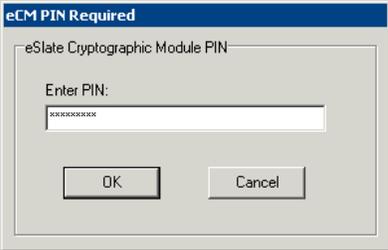
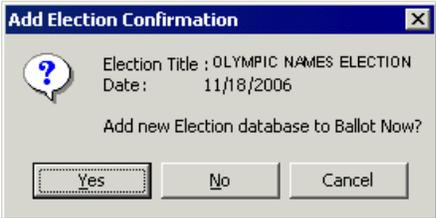


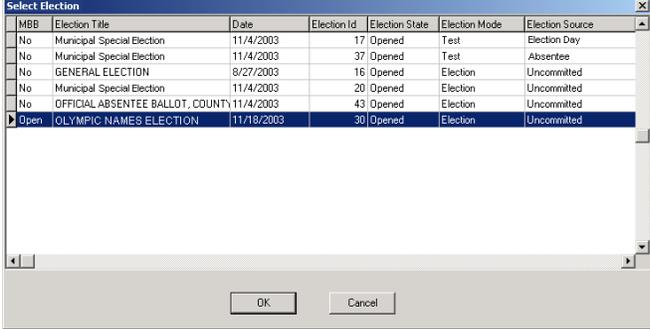
# Chapter 3

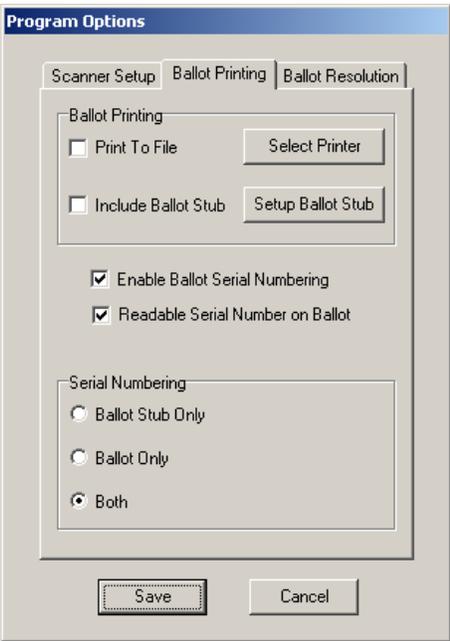
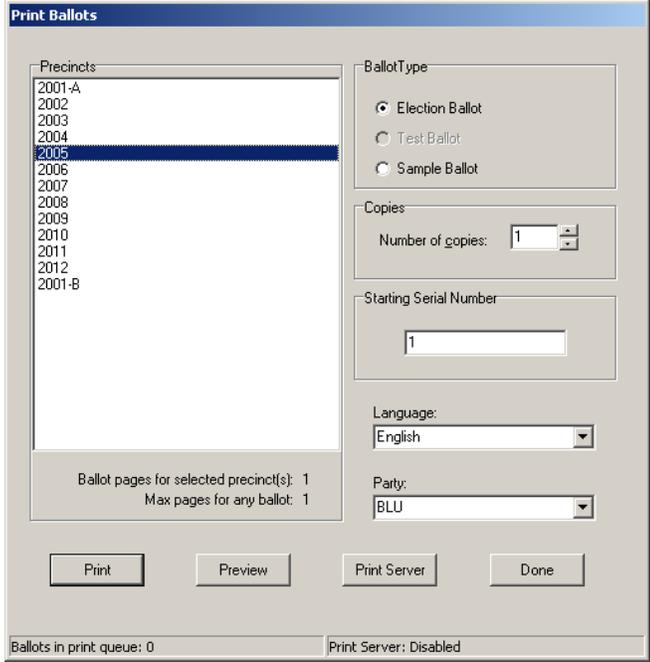
## Printing Ballots

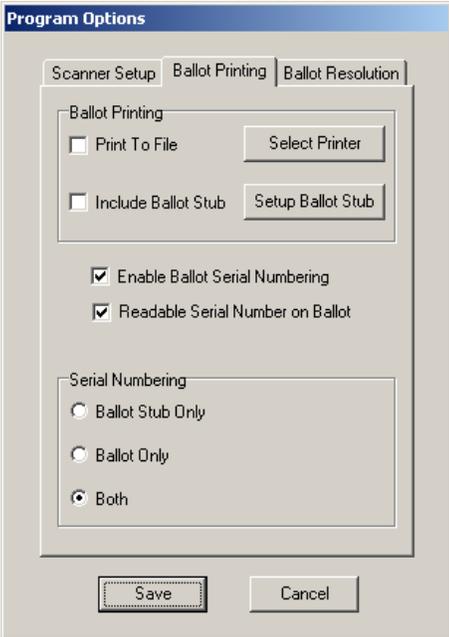
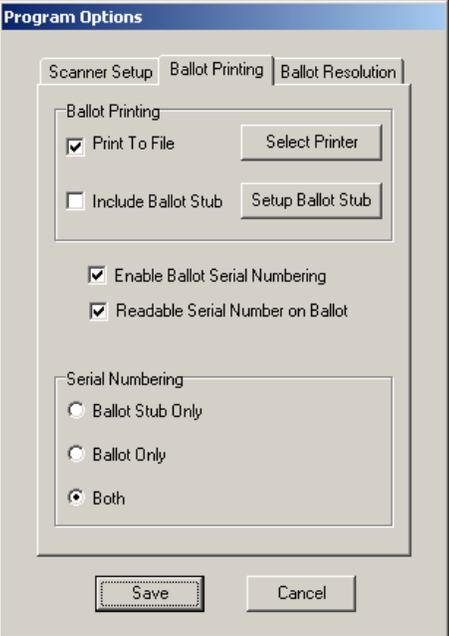
eScan and Ballot Now paper ballots are printed with the Ballot Now software application.

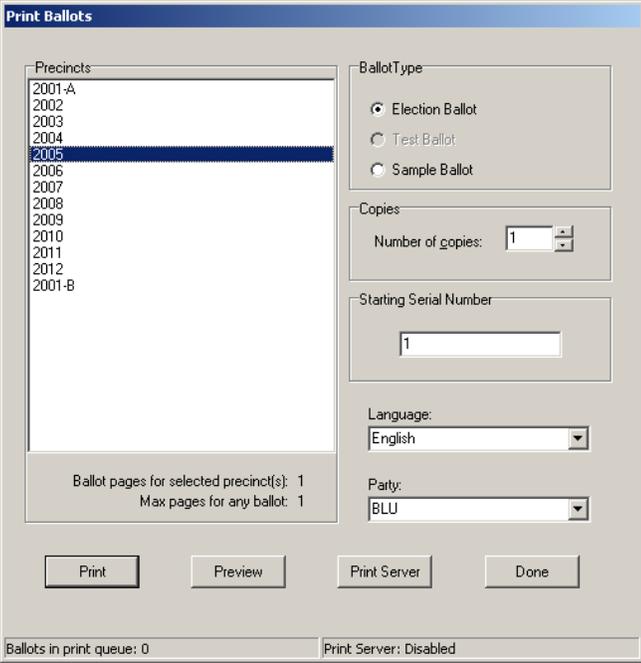
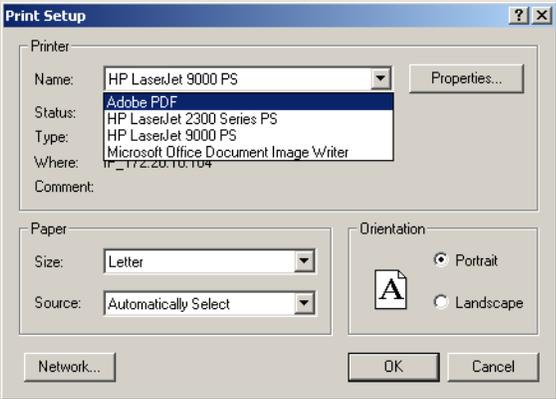
Steps:	Details:
<p>1. Determine requirements for ballot paper and ensure that the correct paper size for ballots is selected in BOSS.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Consider:           <ul style="list-style-type: none"> <li>• Ballot length</li> <li>• Paper weight and postage</li> <li>• State code requirements</li> <li>• Using watermarked stock to prevent tampering/reproduction</li> <li>• Corner cutting the lower left corner 3/8" (upper left corner with ballot stubs) in order to facilitate quick paper orientation when scanning in Ballot Now</li> <li>• Ballot quantities per ballot style/precinct from last like election</li> <li>• In-person voting and by-mail voting needs.</li> </ul> </li> </ul> <p><b>See:</b>            "Appendix F: Paper Weights and Scanner Throughput" on page 127.</p>
<p>2. Ensure that the printer and scanner have been maintained, and that necessary replacement supplies are on hand.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Refer to printer and scanner operations manuals for routine maintenance guidelines.</li> <li><input type="checkbox"/> Acquire spare printer toner cartridges.</li> <li><input type="checkbox"/> Acquire scanner cleaning kits.</li> </ul>
<p>3. Open Ballot Now and log in as a user with Administrator or Operator permissions.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Double-click the Ballot Now shortcut on the desktop.</li> <li><input type="checkbox"/> If using a client-server Ballot Now setup, log in to the server first, then client(s).</li> <li><input type="checkbox"/> A user with Administrator permissions must establish all Ballot Now users and permission levels (on the server PC).</li> </ul> <p><b>Note:</b>            Ballots cannot be printed from client PCs.</p>

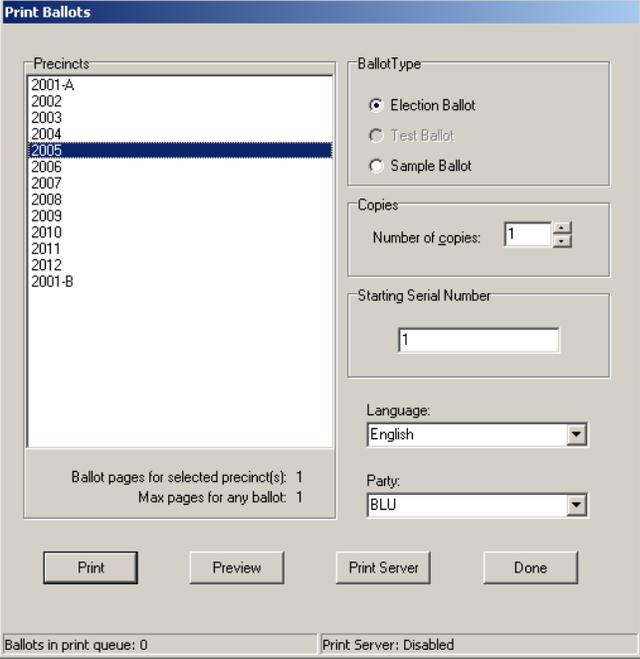
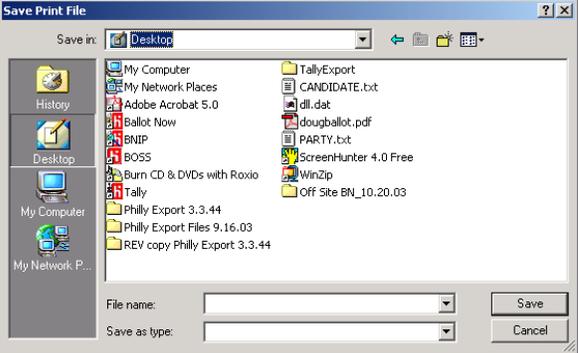
<b>Steps:</b>	<b>Details:</b>
<p>4. Insert the eCM into a USB port.</p> 	<p>USB ports are identified with this symbol:</p> 
<p>5. Insert the MBB designated for Ballot Now into the card device, and then go to the <b>Election</b> menu and click <b>Select Election</b>.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Use an Election mode MBB to print live election ballots.</li> <li><input type="checkbox"/> Use a Test mode MBB to print Test ballots for Ballot Now and/or eScan.             <ul style="list-style-type: none"> <li>• System Logic and Accuracy Test</li> <li>• eScan embedded Logic and Accuracy Test</li> </ul> </li> </ul>
<p>6. When prompted, enter the eCM PIN and click <b>OK</b>.</p> 	
<p>7. If prompted to confirm adding a new election to Ballot Now, click <b>Yes</b>.</p> 	<p><b>Note:</b> This prompt only appears if an MBB, of this mode (Test or Election) and for this election, has not previously been opened in Ballot Now.</p>

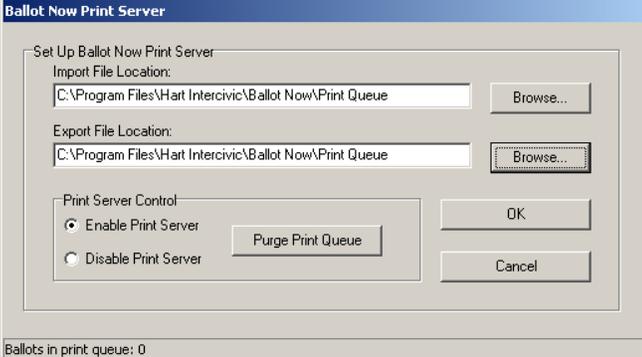
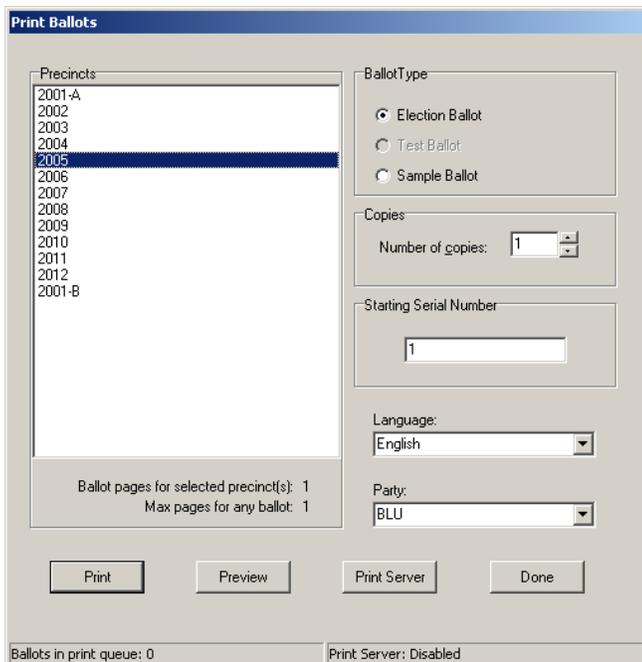
<b>Steps:</b>	<b>Details:</b>																																																	
<p>8. In the <b>Select Election</b> window, highlight the target election and click <b>OK</b>.</p>  <table border="1" data-bbox="196 296 846 625"> <thead> <tr> <th>MBB</th> <th>Election Title</th> <th>Date</th> <th>Election Id</th> <th>Election State</th> <th>Election Mode</th> <th>Election Source</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>Municipal Special Election</td> <td>11/4/2003</td> <td>17</td> <td>Opened</td> <td>Test</td> <td>Election Day</td> </tr> <tr> <td>No</td> <td>Municipal Special Election</td> <td>11/4/2003</td> <td>37</td> <td>Opened</td> <td>Test</td> <td>Absentee</td> </tr> <tr> <td>No</td> <td>GENERAL ELECTION</td> <td>9/27/2003</td> <td>16</td> <td>Opened</td> <td>Election</td> <td>Uncommitted</td> </tr> <tr> <td>No</td> <td>Municipal Special Election</td> <td>11/4/2003</td> <td>20</td> <td>Opened</td> <td>Election</td> <td>Uncommitted</td> </tr> <tr> <td>No</td> <td>OFFICIAL ABSENTEE BALLOT, COUNTY</td> <td>11/4/2003</td> <td>43</td> <td>Opened</td> <td>Election</td> <td>Uncommitted</td> </tr> <tr> <td>Open</td> <td>OLYMPIC NAMES ELECTION</td> <td>11/18/2003</td> <td>30</td> <td>Opened</td> <td>Election</td> <td>Uncommitted</td> </tr> </tbody> </table>	MBB	Election Title	Date	Election Id	Election State	Election Mode	Election Source	No	Municipal Special Election	11/4/2003	17	Opened	Test	Election Day	No	Municipal Special Election	11/4/2003	37	Opened	Test	Absentee	No	GENERAL ELECTION	9/27/2003	16	Opened	Election	Uncommitted	No	Municipal Special Election	11/4/2003	20	Opened	Election	Uncommitted	No	OFFICIAL ABSENTEE BALLOT, COUNTY	11/4/2003	43	Opened	Election	Uncommitted	Open	OLYMPIC NAMES ELECTION	11/18/2003	30	Opened	Election	Uncommitted	
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Open	OLYMPIC NAMES ELECTION	11/18/2003	30	Opened	Election	Uncommitted																																												
<p>9. Remove the eCM.</p> 	<p>Store the eCM in a secure location separate from the MBBs.</p>																																																	
<p>10. (Optional) Print a “Zero Report”.</p> 	<p>Go to the <b>Reports</b> menu and click <b>Election Report</b>.</p> <p><b>Note:</b></p> <p>Some jurisdictions request a “Zero Report” for Ballot Now at intervals to show that there are no CVRs already saved in the system.</p>																																																	

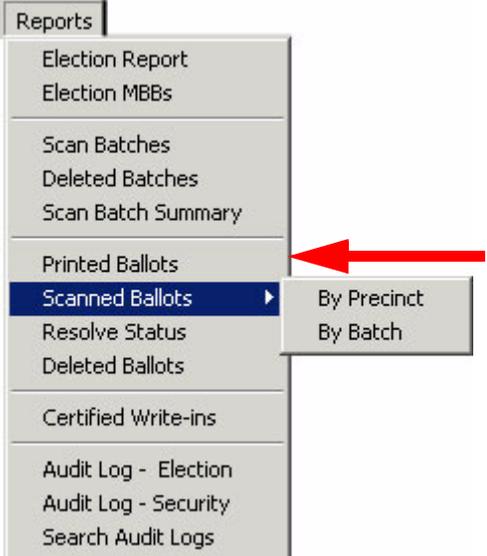
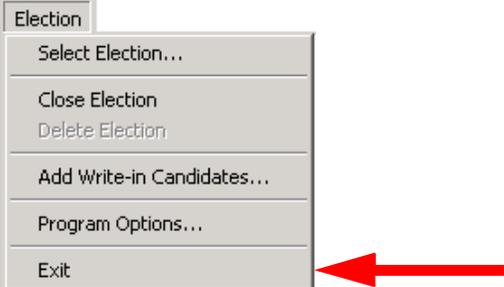
Steps:	Details:
<p>11. Plan ballot printing in order to print:</p> <ol style="list-style-type: none"> <li><b>Sample</b> ballots                     <ul style="list-style-type: none"> <li><input type="checkbox"/> Disable serial numbering</li> <li><input type="checkbox"/> Use a Test Mode MBB</li> </ul> </li> <li><b>OR Test</b> ballots                     <ul style="list-style-type: none"> <li><input type="checkbox"/> Enable serial numbering</li> <li><input type="checkbox"/> Use a Test Mode MBB</li> </ul> </li> <li><b>OR Election</b> ballots                     <ul style="list-style-type: none"> <li><input type="checkbox"/> Enable serial numbering</li> <li><input type="checkbox"/> Use an Election Mode MBB</li> </ul> </li> </ol>  	<ul style="list-style-type: none"> <li><input type="checkbox"/> Printing <b>sample</b> ballots is not required, but it is recommended.                     <ul style="list-style-type: none"> <li>• Sample ballots can be printed from Test or Election mode MBBs.</li> <li>• It is recommended that sample ballots be printed from Test mode MBBs and printed without serial numbers. Sample ballots will be rejected if scanned.</li> </ul> </li> <li><input type="checkbox"/> <b>Test</b> ballots can only be printed from Test mode MBBs.                     <ul style="list-style-type: none"> <li>• Use Test ballots for system Logic and Accuracy Testing (LAT).</li> <li>• Use Test ballots for eScan embedded LAT.</li> </ul> </li> <li><input type="checkbox"/> <b>Election</b> ballots can only be printed from Election mode MBBs.                     <ul style="list-style-type: none"> <li>• When on-site printing with multiple Ballot Now systems using serial numbered ballots, assign a separate serial number range to each system.</li> <li>• When printing both off-site <i>and</i> on-site, assign a separate serial number range for on-site/on-demand ballots.</li> </ul> </li> </ul> <p> Once ballots are printed <i>with</i> serial numbers, ballots cannot be printed <i>without</i> serial numbers from that Ballot Now database.</p> <p><b>See:</b> The <i>Tally Training Manual</i> for recommended Logic and Accuracy Testing procedures.</p> <p><b>Note:</b> The <b>Program Options</b> and <b>Print Ballots</b> window selections shown on the left reflect print options set up for Election ballots.</p> <p><b>Tip(s):</b> Due to a Windows “memory leak” issue, the Ballot Now application should be closed and restarted after printing 5,000 ballots in a given session.</p>

<b>Steps:</b>	<b>Details:</b>
<p>12. Go to the <b>Elections</b> menu and click <b>Program Options</b>. Select ballot printing and ballot stub options in the <b>Program Options</b> window.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Click the <b>Ballot Printing</b> tab.</li> <li><input type="checkbox"/> Printing Options Include: <ul style="list-style-type: none"> <li>• Selecting a printer</li> <li>• Printing to file for postscript formatting</li> <li>• Including a ballot stub</li> <li>• Setting up a ballot stub</li> <li>• Enabling ballot serial numbering</li> <li>• Enabling a readable serial number on the ballot</li> <li>• Printing the serial number on the ballot stub, the ballot, or both</li> </ul> </li> <li><input type="checkbox"/> After making all selections in the <b>Program Options</b> window, click <b>Save</b>.</li> </ul> <p><b>Note:</b> You can select <b>Both</b> in the <b>Serial Numbering</b> panel, even if there is no ballot stub. Serial numbers will print on ballots.</p>
<p>13. If printing to file, select the <b>Print to File</b> checkbox on the <b>Ballot Printing</b> tab of the <b>Program Options</b> window.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Go to the <b>Elections</b> menu and click <b>Program Options</b> to open the <b>Program Options</b> window.</li> <li><input type="checkbox"/> When finished, click <b>Save</b>.</li> <li><input type="checkbox"/> For off-site printing, select print to file and send one file to the off-site printer for each ballot precinct, language, and/or party (primary).</li> </ul> <p><b>Tip(s):</b> Due to a Windows “memory leak” issue, the Ballot Now application should be closed and restarted after printing 5,000 ballots in a given session.</p>

Steps:	Details:
<p>14. Go to the <b>Print</b> menu and click <b>Print Ballots</b>. Select the precinct(s), ballot type, number of copies to print, language, starting serial number, and party (primary only) for the ballot(s).</p> 	<p><b>Note:</b> In primary elections only, party-specific ballots are identified by the party code (not full party name).</p> <p>When printing ballots with serial numbers, if the printer jams, duplicate ballots may print out. Should this situation arise, shred all but one copy of the duplicate ballot.</p> <p><b>Tip(s):</b> In a client-server setup, ballots can be printed on the server while resolving ballots at client stations.</p> <p> If printing ballots for the eScan device, the eScan does <i>not</i> accept 11x17 ballots.</p> <p> When printing large batches, make sure the previous print job is complete as shown in the <b>Print Ballots</b> progress window before printing the next batch.</p>
<p>15. In the <b>Print Ballots</b> window, click <b>Print</b>.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Select a postscript printer from the <b>Print Setup</b> window, if it appears</li> <li><input type="checkbox"/> Click <b>OK</b>.</li> </ul>
<p>16. If printing to file, click <b>Select Printer</b> and select the Adobe printer.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> AdobePDF or AcrobatPDF Writer may be the available Adobe printers.</li> <li><input type="checkbox"/> Other postscript printer drivers may also be used. Printer drivers should be tested to make certain that all fonts are included in the output file.</li> <li><input type="checkbox"/> After selecting the printer, click <b>OK</b> and then click <b>Save</b> in the <b>Program Options</b> window.</li> </ul>

Steps:	Details:
<p>17. If printing to file, return to the <b>Print</b> menu and click <b>Print Ballots</b>. Select the precinct(s), ballot type, number of copies to print, language, starting serial number, and party (primary only) for the ballot(s).</p> 	<p>Click <b>Print</b>.</p> 
<p>18. If printing to file, save the postscript file to a folder on the PC.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Name the file with the precinct name, language, party (Primary Election only) embedded serial numbers, if using S/N, and date printed to file.</li> <li><input type="checkbox"/> The file is saved in postscript (.ps) format.</li> <li><input type="checkbox"/> Zip and transfer postscript files to the off-site printer (or convert to .pdf before transferring, according to print services preferences).</li> </ul>

<b>Steps:</b>	<b>Details:</b>
<p>19. If printing from a print queue, in the <b>Print Ballots</b> window, click <b>Print Server</b> to open the <b>Print Server</b> window.</p> 	<p><input type="checkbox"/> Select the <b>Enable Print Server</b> radio button in order to automatically print all precincts from loaded print queue, *.bnp, files</p> <ul style="list-style-type: none"> <li>In the <b>Ballot Now Print Server</b> window, use the <b>Browse</b> buttons to target import and export folder locations.</li> <li>Click <b>OK</b>.</li> <li>Ballot Now prints all ballots identified in *.bnp files in the import folder, deletes those *.bnp files, and sends print results reports to the export folder.</li> </ul> <p><b>Note:</b> Manual printing and ballot scanning are disabled when the print server is enabled.</p> <p><b>See:</b> “Appendix E: Print Queue File Format” on page 125.</p> <p>The <i>Ballot Now Operations Manual</i> for more information about using the print server and print queue files.</p> <p><b>Tip(s):</b> Due to a Windows “memory leak” issue, the Ballot Now application should be closed and restarted after printing 5,000 ballots in a given session.</p>
<p>20. After printing ballots, click <b>Done</b> in the <b>Print Ballots</b> window.</p> 	<p>This action closes the <b>Print Ballots</b> window.</p>

<b>Steps:</b>	<b>Details:</b>
<p>21. Print a "Printed Ballots By Precinct" report.</p>  <p>The screenshot shows a 'Reports' menu with the following items: Election Report, Election MBBs, Scan Batches, Deleted Batches, Scan Batch Summary, Printed Ballots, Scanned Ballots (highlighted), Resolve Status, Deleted Ballots, Certified Write-ins, Audit Log - Election, Audit Log - Security, and Search Audit Logs. A sub-menu for 'Scanned Ballots' is open, showing 'By Precinct' and 'By Batch'. A red arrow points to the 'Printed Ballots' menu item.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Go to the <b>Reports</b> menu and click <b>Printed Ballots</b>.</li> <li><input type="checkbox"/> Use this report to verify the number of ballots printed in each printing session. Keep for official records.</li> <li><input type="checkbox"/> If using multiple Ballot Now systems, it is useful to color-code each system and the corresponding report paper for each system.</li> </ul>
<p>22. Exit Ballot Now.</p>  <p>The screenshot shows an 'Election' menu with the following items: Select Election..., Close Election, Delete Election, Add Write-in Candidates..., Program Options..., and Exit. A red arrow points to the 'Exit' menu item.</p>	<p>Go to the <b>Election</b> menu and click <b>Exit</b>.</p>

**Notes:**



# Chapter 4

## Scanning Ballots

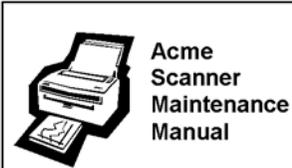
This chapter covers scanning ballots using the Ballot Now application. When ballots are scanned, they are *not* tabulated. Tabulation occurs later using the Tally application.

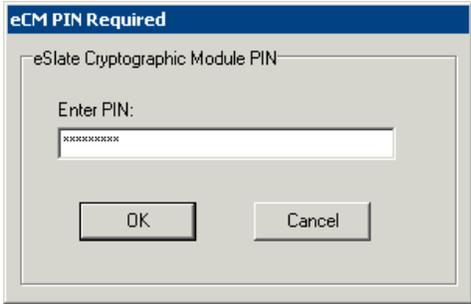
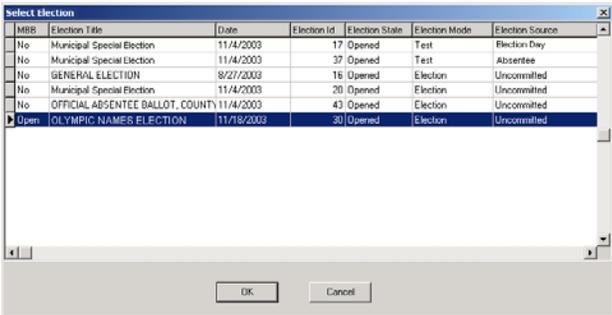
**See:**

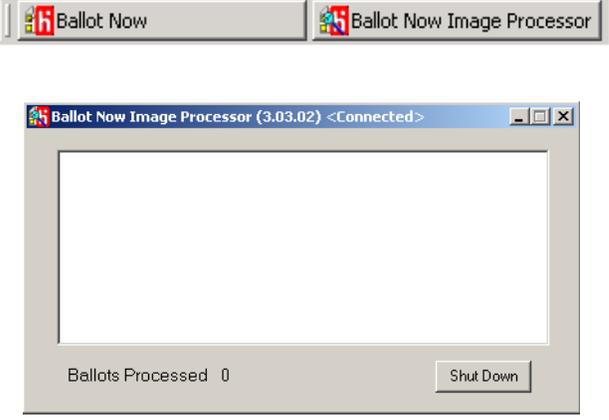
The eScan Desk Reference for information on scanning ballots with the eScan device.

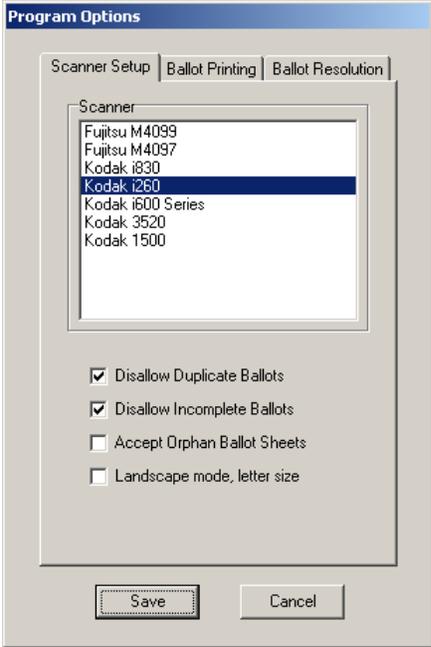
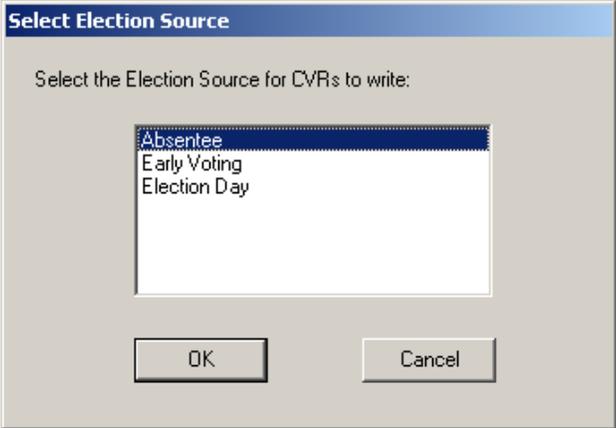


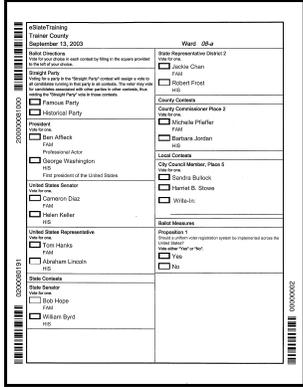
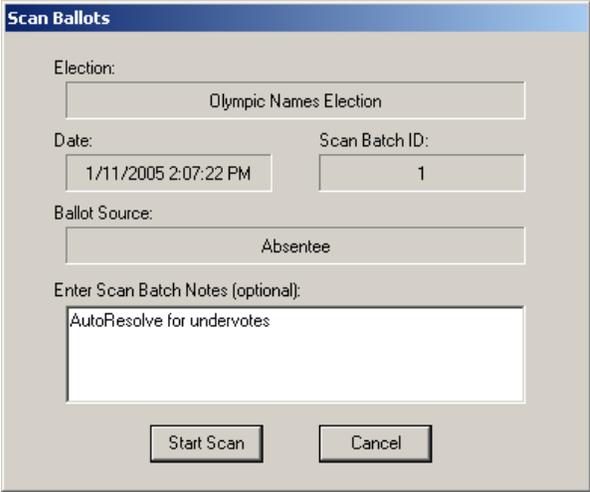
Ballots from an eScan emergency ballot box may be scanned on either an eScan or a Ballot Now scanner. Regardless of which device ballots are scanned with, ballots should only be scanned once.

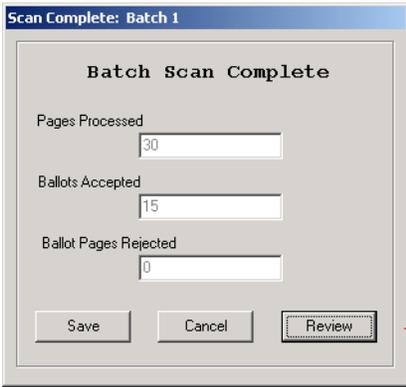
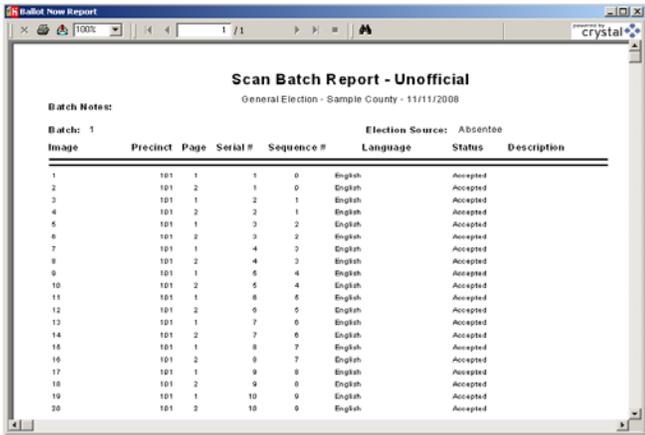
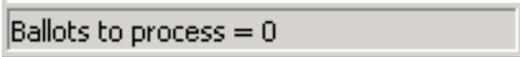
<b>Steps:</b>	<b>Details:</b>
<p>1. Make certain that regularly scheduled scanner maintenance guidelines have been followed.</p> <div data-bbox="342 936 704 1157" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  <p style="margin: 0;">Acme Scanner Maintenance Manual</p> </div>	<p><b>See:</b></p> <p>Manufacturer's scanner documentation for instructions and guidelines on scanner maintenance.</p> <p>Scanner guides must be cleaned regularly and lamps must be checked.</p>
<p>2. Open Ballot Now and log in as a user with Administrator or Operator permissions.</p> <div data-bbox="449 1268 607 1409" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  <p style="margin: 0;">Ballot Now</p> </div>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Double-click the Ballot Now shortcut on the desktop or go to <b>Start/Programs/Hart InterCivic/Ballot Now</b>.</li> <li><input type="checkbox"/> If using a client-server Ballot Now setup, log into the server first, then client(s).</li> </ul> <p><b>Note:</b></p> <p>Scanning cannot be accomplished from client PCs. Client PCs can be used to make image processing more efficient.</p>
<p>3. If using a client-server Ballot Now setup, clients can now log in.</p> <div data-bbox="449 1610 607 1751" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  <p style="margin: 0;">Ballot Now</p> </div> <p><b>Note:</b></p> <p>All steps in this chapter refer to stand-alone or server directions unless specifically identifying the client.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> At the client station: <ul style="list-style-type: none"> <li>• Double-click the Ballot Now shortcut.</li> <li>• Log in.</li> <li>• Establish connection to the server IP address, if necessary.</li> <li>• Accept server certificate, if necessary.</li> </ul> </li> <li><input type="checkbox"/> At the server station: <ul style="list-style-type: none"> <li>• Accept the client certificate, if necessary.</li> </ul> </li> </ul> <p><b>See:</b></p> <p>"Appendix C: Hart Voting System Software User Tips" on page 119.</p>

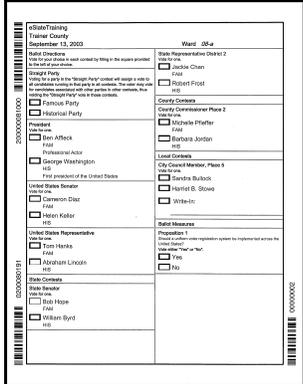
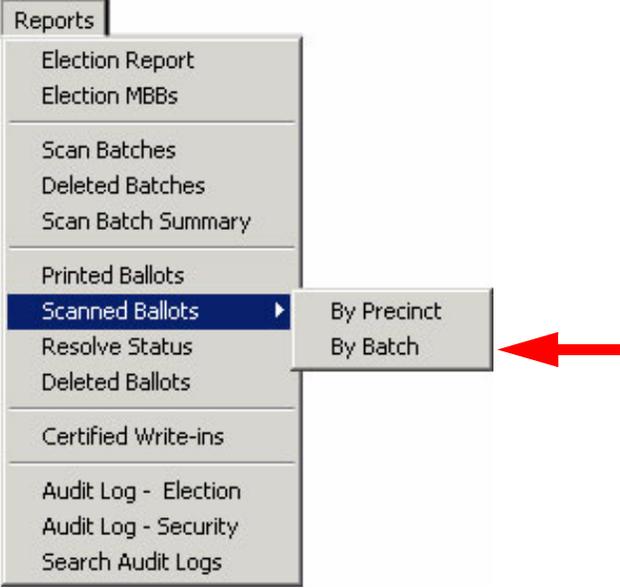
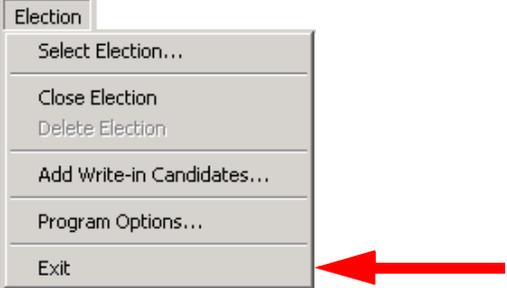
<b>Steps:</b>	<b>Details:</b>																																																	
<p>4. Insert the eCM into a USB port.</p> 	<p><input type="checkbox"/> USB ports are identified with this symbol:</p>  <p><input type="checkbox"/> Client PCs do not use either the eCM or the MBB directly.</p>																																																	
<p>5. Insert the MBB designated for Ballot Now into the card device, and then go to the <b>Election</b> menu and click <b>Select Election</b>.</p> 	<p><input type="checkbox"/> Use an Election mode MBB to scan live election ballots.</p> <p><input type="checkbox"/> Use a Test mode MBB to scan Test ballots.</p> <p><b>Note:</b> Sample ballots will be rejected, if scanned.</p>																																																	
<p>6. When prompted, enter the eCM PIN and click <b>OK</b>.</p> 																																																		
<p>7. In the <b>Select Election</b> window, highlight the target election and click <b>OK</b>.</p>  <table border="1" data-bbox="126 1327 738 1642"> <thead> <tr> <th>MBB</th> <th>Election Title</th> <th>Date</th> <th>Election Id</th> <th>Election State</th> <th>Election Mode</th> <th>Election Source</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>Municipal Special Election</td> <td>11/4/2003</td> <td>17</td> <td>Opened</td> <td>Test</td> <td>Election Day</td> </tr> <tr> <td>No</td> <td>Municipal Special Election</td> <td>11/4/2003</td> <td>37</td> <td>Opened</td> <td>Test</td> <td>Absentee</td> </tr> <tr> <td>No</td> <td>GENERAL ELECTION</td> <td>8/27/2003</td> <td>16</td> <td>Opened</td> <td>Election</td> <td>Uncommitted</td> </tr> <tr> <td>No</td> <td>Municipal Special Election</td> <td>11/4/2003</td> <td>20</td> <td>Opened</td> <td>Election</td> <td>Uncommitted</td> </tr> <tr> <td>No</td> <td>OFFICIAL ABSENTEE BALLOT, COUNTY</td> <td>11/4/2003</td> <td>43</td> <td>Opened</td> <td>Election</td> <td>Uncommitted</td> </tr> <tr> <td>Open</td> <td>OLYMPIC NAMES ELECTION</td> <td>11/19/2003</td> <td>20</td> <td>Opened</td> <td>Election</td> <td>Uncommitted</td> </tr> </tbody> </table>	MBB	Election Title	Date	Election Id	Election State	Election Mode	Election Source	No	Municipal Special Election	11/4/2003	17	Opened	Test	Election Day	No	Municipal Special Election	11/4/2003	37	Opened	Test	Absentee	No	GENERAL ELECTION	8/27/2003	16	Opened	Election	Uncommitted	No	Municipal Special Election	11/4/2003	20	Opened	Election	Uncommitted	No	OFFICIAL ABSENTEE BALLOT, COUNTY	11/4/2003	43	Opened	Election	Uncommitted	Open	OLYMPIC NAMES ELECTION	11/19/2003	20	Opened	Election	Uncommitted	<p><b>Note:</b> Client users can log in either before or after the election has been selected on the server.</p>
MBB	Election Title	Date	Election Id	Election State	Election Mode	Election Source																																												
No	Municipal Special Election	11/4/2003	17	Opened	Test	Election Day																																												
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No	Municipal Special Election	11/4/2003	20	Opened	Election	Uncommitted																																												
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Open	OLYMPIC NAMES ELECTION	11/19/2003	20	Opened	Election	Uncommitted																																												
<p>8. Remove the eCM.</p> 	<p>Store the eCM in a secure location separate from the MBBs.</p>																																																	

<b>Steps:</b>	<b>Details:</b>
<p>9. If using a client-server Ballot Now setup, clients can now select the election.</p> 	<p>From client station(s), go to the <b>Election</b> menu and click <b>Select Election</b>.</p>
<p>10. If using a client-server Ballot Now setup, the server can now shut down the Ballot Now Image Processor (BNIP).</p> 	<p>From the server:</p> <ul style="list-style-type: none"> <li>• Select <b>Ballot Now Image Processor</b> from the taskbar.</li> <li>• Click <b>Shut Down</b> in the <b>Ballot Now Image Processor</b> window.</li> </ul> <p><b>Note:</b> This allows the server PC to work more efficiently, as the clients process all images.</p> <p> Do <i>not</i> shut down the Ballot Now Image Processor (BNIP) on a stand-alone Ballot Now PC.</p>
<p>11. If using a client-server Ballot Now setup, clients can now minimize Ballot Now.</p> 	<p>From the client station(s):</p> <ul style="list-style-type: none"> <li>• Click the “minimize” icon in the upper right corner of the <b>Ballot Now</b> window.</li> </ul> <p><b>Note:</b> During scanning, the client is only used to make image processing more efficient, which is accomplished using the client BNIP. Hart recommends that users at client stations view the BNIP window periodically to ensure that ballots are correctly processing.</p>
<p>12. (Optional) Print a “Zero Report”.</p> 	<p>Go to the <b>Reports</b> menu and click <b>Election Report</b>.</p> <p><b>Note:</b> Some jurisdictions request a “Zero Report” for Ballot Now at intervals to show that there are no CVRs already saved in the system. The “Election Report”, printed before saving resolved batches to card, reflects this.</p>

Steps:	Details:
<p>13. Set up <b>Program Options</b> for scanning.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Go to the <b>Election</b> menu, click <b>Program Options</b>, and click the <b>Scanner Setup</b> tab.             <ul style="list-style-type: none"> <li>• Select the scanner being used.</li> <li>• Disallow duplicate ballots if using serial numbers on the ballots.</li> <li>• Disallow incomplete ballots if any ballot will be multi-sheet (more than two pages) and you do not want to accept orphan ballots.</li> <li>• Choose to accept orphan ballot sheets in accordance with federal, state, and local guidelines.</li> <li>• Choose to scan landscape, if using a letter-size ballot (faster scanning).</li> </ul> </li> <li><input type="checkbox"/> After making all <b>Program Options</b> selections, click <b>Save</b>.</li> </ul>
<p>14. Select the source tag for this batch.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Go to the <b>Scan</b> menu and click <b>Set Election Source</b>.             <ul style="list-style-type: none"> <li>• Ballot Now batches must be designated as Absentee, Early Voting, or Election Day type batches.</li> <li>• The default setting upon initializing a new election in Ballot Now is “Absentee”.</li> </ul> </li> </ul> <p><b>Note:</b> The batch source setting is persistent. Batch source designation remains at the selected setting for all batches in this election database, until the source identification option is changed manually. Batches can only be written to MBBs identified for the same source type.</p>

<b>Steps:</b>	<b>Details:</b>
<p>15. Scan ballots:</p>	
<p>15.1 Group the ballots into batches</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Ballots do not need to be pre-sorted by precinct, etc.</li> <li><input type="checkbox"/> Batch sizes should be between 50 and 250 ballot sheets, depending on the scanner model.</li> </ul> <p><b>Tip(s):</b> In a client-server setup, ballots can be scanned on the server while resolving ballots at client stations.</p>
<p>15.2 Load a batch into the scanner</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> You do not need to load the ballots into the scanner in any particular order.</li> <li><input type="checkbox"/> Ballots will process somewhat faster if oriented top-of-page toward the scanner, but it is not necessary to do so.</li> </ul> <p><b>See:</b> The scanner manufacturer's documentation for instructions on correct placement of ballots in the feeder tray.</p>
<p>15.3 Scan ballots.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Go to the <b>Scan</b> menu and click <b>Scan Ballots</b>.</li> <li><input type="checkbox"/> Use the <b>Enter Scan Batch Notes</b> field of the <b>Scan Ballots</b> window to note, at minimum: <ul style="list-style-type: none"> <li>• AutoResolved batches</li> <li>• Replacement batches</li> </ul> </li> <li><input type="checkbox"/> Click <b>Start Scan</b>.</li> </ul> <p><b>Note:</b> Scan batch notes can be appended or replaced in the <b>Administer Batch</b> window. Go to the <b>Manage</b> menu and click <b>Manage Scan Batches</b>.</p> <p><b>See:</b> "Scan Batch Management" on page 22.</p>

Steps:	Details:
<p>15.4 Review and print scan results.</p>  	<ul style="list-style-type: none"> <li><input type="checkbox"/> Do <i>not</i> click <b>Save</b> yet.</li> <li><input type="checkbox"/> After scanning, click <b>Review</b> in the <b>Scan Complete</b> window.</li> </ul>  <ul style="list-style-type: none"> <li>• Review the “Scan Batch Report” and determine whether there were scanner errors that necessitate re-scanning the batch.</li> <li>• Click the printer icon and print the report.</li> <li>• If saving the batch, clip the “Scan Batch Report” on top of the scanned batch of paper ballots.</li> <li>• Close the report.</li> </ul>
<p>16. Save scanned images.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Click <b>Save</b> in the <b>Scan Complete</b> window.</li> </ul>  <p> If you are <i>not</i> using separate Ballot Now Image Processor PCs, wait while images are processed (“Ballots to process” countdown is visible in the taskbar) before attempting to resolve a batch.</p>  <p><b>Tip(s):</b> It is most efficient to scan all available ballots, then resolve all available ballots in a separate process.</p>

<b>Steps:</b>	<b>Details:</b>
<p>17. Repeat scanning steps 14-16 for each batch.</p> 	<p><b>Note:</b> If the ballot source has changed, verify that the ballot source setting is correct.</p> <p><b>See:</b> “Scan Batch Management” on page 22.</p>
<p>18. When the scanning session is complete, print a “Scanned Ballots by Batch” report.</p> 	<p>Go to the <b>Reports</b> menu and click <b>Scanned Ballots By Batch</b>.</p>
<p>19. Exit Ballot Now.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Go to the <b>Election</b> menu and click <b>Exit</b>.</li> <li><input type="checkbox"/> Do not exit Ballot Now on a server unless ballot image processing at client stations is completed. <ul style="list-style-type: none"> <li>• The best practice in a client-server setup is to exit Ballot Now on the client station(s) first, then at the server.</li> <li>• To exit Ballot Now from a client station, first maximize the application, and then exit or close the window.</li> </ul> </li> </ul>

**Notes:**



# Chapter 5

## Resolving Ballots

Though resolution is a separate process from scanning, in a client-server Ballot Now setup an operator at the server can scan ballots while operators at client stations are resolving other ballots.

### Part 1: Making Resolution Decisions

Ballot Now identifies contests that require resolution with a color-coded system:

**Yellow** = Undervoted contest

**Avocado** = Damaged contest

**Orange** = Overvoted contest

**Teal** = Protected contest

**Aqua** = Write-in contest

**Green** = Resolved contest

#### Option Boxes:

Gray option boxes indicate options that Ballot Now reads as voted.



White option boxes indicate options that Ballot Now reads as not voted.



#### Voter Intent

Given federal, state, and local guidelines on ballot resolution and voter intent issues, use the following steps to logically process issues encountered when viewing an unresolved contest in Ballot Now:

- Identify the resolution issue for the contest. Use Ballot Now color-codes to establish this.
- Identify voter marks on that contest.
- Identify any grayed-out option boxes. These are the options that Ballot Now reads as the voter's choices.
- Determine voter intent.
- Resolve the contest by:
  - Marking an option (double-clicking in a white option box)
  - OR Deselecting an option (right-clicking in a gray option box)
  - OR Confirming an undervote or overvote (clicking the **Confirm** tool  ).

#### See:

“An Example Ballot Now Election Process” on page 26.

## Part 2: How Ballot Now Reads Marked Ballots, A Reference

This section is presented in order to help Ballot Now operators understand how Ballot Now reads marked ballots. This information can be helpful when making resolution decisions. This section presents some example Ballot Now ballots marked to show typical overvotes, undervotes, write-in contest marks, damaged contests, and straight party contest marks. If using the AutoResolve feature of Ballot Now, marks will be recorded as identified by Ballot Now and as indicated in the following pages.

It is not the objective of eSlate training specialists or Hart InterCivic to teach election law or to influence decisions on voter intent. Sections of state and federal election law may apply to Ballot Now voted ballots and should be regarded by the local elections administrator(s) in determining resolution procedures when processing ballots and determining voter intent. The sections of election law that may apply include, but are not limited to, references and decrees referring to counting irregularly marked ballots, preparing ballots for automatic scanning, and replacing damaged ballots. Ballot Now meets, or exceeds, Federal Voting Systems Standards requirements for accuracy. Given federal, state, and local guidelines on ballot resolution and voter intent issues, use the following information to assist in the decision-making process.

### **Ballot Now Bar Codes**

Refer to the ballot on the opposite page to identify the three Ballot Now bar codes. The basic contents of these codes are listed here. The information in these bar codes cannot be traced to the voter.

#### **Ballot Identifier Code Block:**

- Printed in the upper left corner of the ballot
- Contains the sheet identifier, ballot type (Election, Test, or Sample), precinct identifier, page number, language identifier, party identifier, and two barcode check characters

#### **Serial Number Code Block:**

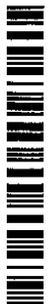
- Printed in the lower left corner of the ballot
- Contains a sequence digit which increments with each ballot printed, an eight-character ballot serial number, a duplex code (front of ballot, back of ballot, blank page), and two check characters
  - If “Enable Ballot Serial Numbering” *and* “Readable Serial Number on Ballot” are selected in Ballot Now **Program Options**, then a sequential serial number prints here in bar code and numeric forms. This is useful for Election ballots.
  - If “Enable Ballot Serial Numbering” is selected, but *not* “Readable Serial Number on Ballot”, the serial number will not print in numeric form. The Ballot Now program will still identify ballots by serial number from the bar code.
  - If “Readable Serial Number on Ballot” is selected, but *not* “Enable Ballot Serial Numbering” all ballots print with the serial number 00000000. This is useful for Sample and Proof ballots to demonstrate ballot serial numbering. Print these ballots before printing Election ballots with serial numbers.
  - If neither “Enable Ballot Serial Numbering on Ballot” nor “Readable Serial Number on Ballot” is chosen, the serial number will not print and Ballot Now will not identify ballots by serial number from the bar code. This is useful for Sample and Proof ballots. Print these ballots before printing Election ballots with serial numbers.

#### **Election ID Code Block:**

- Printed in the lower right corner of the ballot
- Contains the election identifier, the Ballot Now application version number (NNNNN), and two check characters

Ballot Now Bar Codes

<b>eSlateTraining</b> <b>Trainer County</b> <b>September 13, 2003</b>		<b>Ward 08-b</b>	
<b>Ballot Directions</b> Vote for your choice in each contest by filling in the square provided to the left of your choice. Please use a black ink pen to mark the ballot.		<b>State Representative District 2</b> Vote for one.	
<b>President</b> Vote for one.		<input type="checkbox"/> Brad Pitt <input type="checkbox"/> Robert Frost <input checked="" type="checkbox"/> Write-In: <u>BRAO PITT</u>	
<input type="checkbox"/> Paul Newman Professional Actor <input type="checkbox"/> George Washington First president of the United States <input checked="" type="checkbox"/> Write-In:		<b>County Contests</b> <b>County Commissioner Place 2</b> Vote for one.	
<b>United States Senator</b> Vote for one.		<input type="checkbox"/> Angelina Jolie <input type="checkbox"/> Barbara Jordan <input checked="" type="checkbox"/> Write-In: <u>JOHN DOE (not "certified")</u>	
<input type="checkbox"/> Catherine Zeta Jones <input type="checkbox"/> Helen Keller <input checked="" type="checkbox"/> Write-In: <u>MICKEY MOUSE</u>		<b>Local Contests</b> <b>City Council Member, Place 5</b> Vote for one.	
<b>United States Representative</b> Vote for one.		<input type="checkbox"/> Elizabeth Taylor <input type="checkbox"/> Harriet B. Stowe <input type="checkbox"/> Write-In:	
<input type="checkbox"/> Orlando Bloom <input type="checkbox"/> Abraham Lincoln <input checked="" type="checkbox"/> Write-In: <u>John Smith ("CERTIFIED")</u>		<b>City Superintendent of Schools</b> Vote for one.	
<b>State Contests</b> <b>State Senator</b> Vote for one.		<input type="checkbox"/> Liam Neeson <input type="checkbox"/> William Glasser <input type="checkbox"/> Write-In:	
<input type="checkbox"/> Colin Farrell <input type="checkbox"/> William Byrd <input checked="" type="checkbox"/> Write-In: <u>"Smitty" J. Smith</u> (NICKNAME)		<b>Ballot Measures</b> <b>Proposition 1</b> Should a uniform voter registration system be implemented across the United States? Vote either "Yes" or "No".	
<input type="checkbox"/> Yes <input type="checkbox"/> No			



10000010120093

00000001 50



Serial Number  
 "00000001"

0473010122



## **Overvoted Contests**

Refer to the ballot on the opposite page to identify typical marks Ballot Now reads as overvotes. An overvote is a vote for more than the number of positions to be filled for a single contest.

### **Ballot Now Reads:**

- Most dark colored pens and markers

### **Ballot Now May Not Read:**

- Light colored pens, most reds, light blues, most highlighters, and pencils

### **Recommended to Use:**

- Black or standard blue pen, filling the option box
- Also refer to specific scanner documentation

## **Ballot Now Reads All Contests on the Opposite Page as Overvotes**

### **“City Council Member, Place 5” Contest:**

- Ballot Now reads this write-in option as voted.
- Overvotes and undervotes must be resolved before write-ins are resolved.

Ballot Now reads these marks as **overvotes**

eSlateTraining Trainer County September 13, 2003		Ward 08-b	
<b>Ballot Directions</b> Vote for your choice in each contest by filling in the square provided to the left of your choice. Please use a black ink pen to mark the ballot.		<b>County Contests</b>	
<b>President</b> Vote for one. <input checked="" type="checkbox"/> Paul Newman Professional Actor <input checked="" type="checkbox"/> George Washington First president of the United States		<b>County Commissioner Place 2</b> Vote for one. <input checked="" type="checkbox"/> Angelina Jolie <input checked="" type="checkbox"/> Barbara Jordan	
<b>United States Senator</b> Vote for one. <input checked="" type="checkbox"/> Catherine Zeta Jones <input checked="" type="checkbox"/> Helen Keller		<b>Local Contests</b>	
<b>United States Representative</b> Vote for one. <input checked="" type="checkbox"/> Orlando Bloom <input checked="" type="checkbox"/> Abraham Lincoln		<b>City Council Member, Place 5</b> Vote for one. <input checked="" type="checkbox"/> Elizabeth Taylor <input checked="" type="checkbox"/> Harriet B. Stowe Write-In: <u>JESSE VENTURA</u>	
<b>State Contests</b>		<b>City Superintendent of Schools</b> Vote for one. <input checked="" type="checkbox"/> Liam Neeson ← This one <input checked="" type="checkbox"/> William Glasser	
<b>State Senator</b> Vote for one. <input checked="" type="checkbox"/> Colin Farrell <input checked="" type="checkbox"/> William Byrd		<b>Ballot Measures</b>	
<b>State Representative District 2</b> Vote for one. <input checked="" type="checkbox"/> Brad Pitt <input checked="" type="checkbox"/> Robert Frost		<b>Proposition 1</b> Should a uniform voter registration system be implemented across the United States? Vote either "Yes" or "No". <input checked="" type="checkbox"/> Yes <i>OOPS! NEITHER ONE!</i> <input checked="" type="checkbox"/> No	



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## **Undervoted Contests**

Refer to the ballot on the opposite page to identify typical marks Ballot Now reads as undervotes. An undervote is a vote for less than the total number of election contests listed on the ballot, or of voting for less than the number of positions to be filled for a single contest.

### **Ballot Now Reads:**

- Most dark colored pens and markers

### **Ballot Now May Not Read:**

- Light colored pens, most reds, light blues, most highlighters, and pencils

### **Recommended to Use:**

- Black or standard blue pen, filling the option box
- Also refer to specific scanner documentation

## **Ballot Now Reads All Contests on the Opposite Page as Undervotes**

### **“Proposition 1” Contest:**

- Ballot Now reads this contest as “damaged” because the option box has been whited-out.
- If AutoResolved or manually confirmed as damaged, this contest is recorded as an undervote.

Ballot Now reads these marks as **undervotes**

eSlateTraining Trainer County September 13, 2003		Ward 08-b	
<b>Ballot Directions</b> Vote for your choice in each contest by filling in the square provided to the left of your choice. Please use a black ink pen to mark the ballot.		<b>County Contests</b>	
<b>President</b> Vote for one. <input type="checkbox"/> Paul Newman Professional Actor <input type="checkbox"/> George Washington First president of the United States		<b>County Commissioner Place 2</b> Vote for one. <input checked="" type="checkbox"/> Angelina Jolie <b>BOTH!</b> <input checked="" type="checkbox"/> Barbara Jordan	
<b>United States Senator</b> Vote for one. <input checked="" type="checkbox"/> Catherine Zeta Jones <b>YES!</b> <input type="checkbox"/> Helen Keller		<b>Local Contests</b>	
<b>United States Representative</b> Vote for one. <input checked="" type="checkbox"/> Orlando Bloom <input type="checkbox"/> Abraham Lincoln <b>No!</b>		<b>City Council Member, Place 5</b> Vote for one. <input type="checkbox"/> Elizabeth Taylor <input type="checkbox"/> Harriet B. Stowe <input type="checkbox"/> Write-In: <b>J. SMITH</b>	
<b>State Contests</b>		<b>City Superintendent of Schools</b> Vote for one. <input checked="" type="checkbox"/> <del>Nam Neeson</del> <b>No!</b> <input type="checkbox"/> William Glasser <b>YES (EDUCATOR)</b>	
<b>State Senator</b> Vote for one. <input type="checkbox"/> <del>Colin Funnell</del> <input type="checkbox"/> William Byrd <b>← Him (Composer)</b>		<b>Ballot Measures</b>	
<b>State Representative District 2</b> Vote for one. <input checked="" type="checkbox"/> Brad Pitt <input checked="" type="checkbox"/> Robert Frost		<b>Proposition 1</b> Should a uniform voter registration system be implemented across the United States? Vote either "Yes" or "No". <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

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## Write-in Votes

Refer to the ballot on the opposite page to identify typical marks Ballot Now reads as votes for a write-in candidate. In Ballot Now, a write-in vote is a name of a candidate that is not listed on the ballot handwritten by the voter in a designated location. Write-in votes are associated with an option box, if that box is filled in. Write-in votes may be for certified or uncertified (free-form) candidates. You can set up Ballot Now to accept certified write-in candidates only, or to accept free-form candidates also.

**See:**

“Prepare for Write-In Resolution, if Applicable” on page 71 for more information about setting up Ballot Now to process certified and/or free-form write-ins.

**Ballot Now Reads:**

- Most dark colored pens and markers

**Ballot Now May Not Read:**

- Light colored pens, most reds, light blues, most highlighters, and pencils

**Recommended to Use:**

- Black or standard blue pen, filling the option box
- Also refer to specific scanner documentation

**Ballot Now Reads All Contests on the Opposite Page as Votes for a Write-in Candidate****“President” Contest:**

- The write-in is left blank, and can be assigned to the “uncertified” category.

**“U.S. Senator” Contest:**

- The write-in is a cartoon character, and can be assigned either to the “uncertified” category, or as a “free form” write-in candidate.

**“U.S. Representative” Contest:**

- The write-in is a “certified” write-in candidate, and can be assigned the vote.

**“State Senator” Contest:**

- The write-in is a nickname of a “certified” write-in candidate, and that candidate can be assigned the vote (depending on state and local guidelines).

**“State Rep. District 2” Contest:**

- The write-in is a candidate on the ballot. This vote can be assigned to a “certified” write-in vote for the candidate and assigned to the candidate in the Tally application, or it can be assigned to the “uncertified” category.

**“County Commissioner Place 2” Contest:**

- The write-in is not a certified write-in, and can be assigned either to the “uncertified” category, or as a “free form” write-in candidate.

Ballot Now *write-in* vote examples



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<p>eSlateTraining Trainer County September 13, 2003</p>		<p>Ward 08-b</p>	
<p><b>Ballot Directions</b> Vote for your choice in each contest by filling in the square provided to the left of your choice. Please use a black ink pen to mark the ballot.</p>		<p><b>State Representative District 2</b> Vote for one.</p> <p><input type="checkbox"/> Brad Pitt</p> <p><input type="checkbox"/> Robert Frost</p> <p><input checked="" type="checkbox"/> Write-In: <u>BRAO PITT</u></p>	
<p><b>President</b> Vote for one.</p> <p><input type="checkbox"/> Paul Newman Professional Actor</p> <p><input type="checkbox"/> George Washington First president of the United States</p> <p><input checked="" type="checkbox"/> Write-In: _____</p>		<p><b>County Contests</b></p> <p><b>County Commissioner Place 2</b> Vote for one.</p> <p><input type="checkbox"/> Angelina Jolie</p> <p><input type="checkbox"/> Barbara Jordan</p> <p><input checked="" type="checkbox"/> Write-In: <u>JOHN DOE (not "certified")</u></p>	
<p><b>United States Senator</b> Vote for one.</p> <p><input type="checkbox"/> Catherine Zeta Jones</p> <p><input type="checkbox"/> Helen Keller</p> <p><input checked="" type="checkbox"/> Write-In: <u>MICKEY MOUSE</u></p>		<p><b>Local Contests</b></p> <p><b>City Council Member, Place 5</b> Vote for one.</p> <p><input type="checkbox"/> Elizabeth Taylor</p> <p><input type="checkbox"/> Harriet B. Stowe</p> <p><input type="checkbox"/> Write-In: _____</p>	
<p><b>United States Representative</b> Vote for one.</p> <p><input type="checkbox"/> Orlando Bloom</p> <p><input type="checkbox"/> Abraham Lincoln</p> <p><input checked="" type="checkbox"/> Write-In: <u>John Smith ("CERTIFIED")</u></p>		<p><b>City Superintendent of Schools</b> Vote for one.</p> <p><input type="checkbox"/> Liam Neeson</p> <p><input type="checkbox"/> William Glasser</p> <p><input type="checkbox"/> Write-In: _____</p>	
<p><b>State Contests</b></p> <p><b>State Senator</b> Vote for one.</p> <p><input type="checkbox"/> Colin Farrell</p> <p><input type="checkbox"/> William Byrd</p> <p><input checked="" type="checkbox"/> Write-In: <u>"Smitty" J. Smith</u> <u>(NICKNAME)</u></p>		<p><b>Ballot Measures</b></p> <p><b>Proposition 1</b> Should a uniform voter registration system be implemented across the United States? Vote either "Yes" or "No".</p> <p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>	

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## **Straight Party Contests**

Refer to the ballots on the next few pages to identify typical marks that voters might make on a ballot with a straight party contest. The Federal Election Commission defines straight party voting as “A mechanism by which voters are permitted to cast a vote indicating the selection of all candidates on the ballot for a single political party.” In other words, straight party voting is 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.

### **Ballot Now Reads:**

- Most dark colored pens and markers

### **Ballot Now May Not Read:**

- Light colored pens, most reds, light blues, most highlighters, and pencils

### **Recommended to Use:**

- Black or standard blue pen, filling the option box
- Also refer to specific scanner documentation

### **The Ballot on the Opposite Page:**

#### **“Straight Party” Contest:**

- Ballot Now reads the straight party vote.

#### **“U.S. Senator” Contest:**

- The emphasis vote has no effect, as this selection has already been made through the “Straight Party” contest choice. Only one vote for the candidate is recorded in the Cast Vote Record (CVR).

#### **“State Treasurer” Contest:**

- Ballot Now reads the cross-over vote

### **Remaining Contests:**

- Ballot Now records a vote for the candidate indicated by the straight party vote in all unmarked contests with straight party associations.
- Ballot Now reads the final contest as undervoted because it is unmarked and there are no options associated with the straight party choice voted.

## **Cross-filed Candidates in Straight Party Contests**

The state of Pennsylvania allows candidate cross-filing, meaning a candidate name can be used more than once in a contest when associated with different political parties.

In contests with cross-filed candidates that allow two or more choices, only one vote can be assigned to each cross-filed candidate. In Ballot Now, a contest with two votes for the same candidate must be resolved manually as an overvote. On the eSlate, a contest with two votes for the same candidate activates the Ballot Information screen, which warns that the voter has attempted to select a candidate whose cross-file alternative has been previously selected.

Ballot Now **straight party contest** resolution examples

Vote Both Sides		
<p><b>Official Ballot</b>  <b>Sample County General</b>  <b>Sample County</b>  <b>November 07, 2006</b></p> <p style="text-align: right;">Precinct <b>2003-2003-A</b></p>		
<p><b>Instructions:</b>                  Use a black pen to fill in the box next to your choice.</p> <p><b>STRAIGHT PARTY</b>                  Voting for a party automatically marks all candidates that have been assigned to that party in contests where straight-party voting is allowed.</p> <p><input checked="" type="checkbox"/> Democratic  <input type="checkbox"/> Republican  <input type="checkbox"/> Libertarian</p>	<p><b>FEDERAL</b></p> <p><b>U.S. Senator</b>                  Vote for One</p> <p><input checked="" type="checkbox"/> Aaron Anderson                  Democratic                  Delegate - Mary Jones                  Delegate - Paul Herrera</p> <p><input type="checkbox"/> Brian Baxr                  Non-Partisan                  Delegate - Howard Vallejo                  Delegate - Paula Tufts</p> <p><input type="checkbox"/> Carl Carlson                  Libertarian                  Delegate - James Smitt                  Delegate - Brenda Faye</p> <p><input type="checkbox"/> Write-in</p>	<p><b>STATE</b></p> <p><b>State Treasurer</b>                  Vote for One</p> <p><input type="checkbox"/> Frances Feeney                  Democratic</p> <p><input checked="" type="checkbox"/> George Gibson                  Republican</p> <p><input type="checkbox"/> Write-in</p> <hr/> <p><b>Attorney General</b>                  Vote for One</p> <p><input type="checkbox"/> Paula Motegna                  Democratic</p> <p><input type="checkbox"/> Quinn Vallejo                  Republican</p> <hr/> <p><b>Board of Education</b>                  Vote for Three</p> <p><input type="checkbox"/> Jerry Johnson                  Non-Partisan</p> <p><input type="checkbox"/> Howard Henderson                  Non-Partisan</p> <p><input type="checkbox"/> Paula Peterson                  Non-Partisan</p> <p><input type="checkbox"/> Yolanda Young                  Non-Partisan</p> <p><input type="checkbox"/> Walter Wright                  Non-Partisan</p> <p><input type="checkbox"/> Bob Benson                  Non-Partisan</p> <p><input type="checkbox"/> Write-in</p> <hr/> <p><input type="checkbox"/> Write-in</p> <hr/> <p><input type="checkbox"/> Write-in</p>
Vote Both Sides		

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## ***Straight Party Contests (continued)***

### **The Ballot on the Opposite Page:**

#### **“Straight Party” Contest:**

- Ballot Now reads the contest as an overvote. It is available for resolution.

#### **Remaining Contests:**

- Initially, Ballot Now reads other unmarked contests associated with the straight party contest as undervotes. The undervoted contests associated with the straight party contest are resolved if the straight party contest is resolved by deselecting a candidate in order to resolve the overvote. All unmarked contests that do not have straight party associations remain identified as undervotes.
- Initially, Ballot Now reads other marked contests associated with the straight party contest as valid votes. The emphasis vote has no effect, as this selection has already been made through the “Straight Party” contest choice if the straight party contest is resolved by deselecting an option box. Only one vote for each option associated with the straight party contest vote is recorded.

Ballot Now **straight party contest** resolution examples, continued

**Vote Both Sides**

<b>Official Ballot</b> <b>Sample County General</b> <b>Sample County</b> <b>November 07, 2006</b>			<b>Precinct 2003-2003-A</b>		
<p><b>Instructions:</b> Use a black pen to fill in the box next to your choice.</p> <p><b>STRAIGHT PARTY</b> Voting for a party automatically marks all candidates that have been assigned to that party in contests where straight-party voting is allowed.</p> <p><input checked="" type="checkbox"/> Democratic ← <i>This one</i></p> <p><input type="checkbox"/> Republican</p> <p><input type="checkbox"/> Libertarian</p>	<b>FEDERAL</b>		<b>STATE</b>		
	<p><b>U.S. Senator</b> Vote for One</p> <p><input checked="" type="checkbox"/> Aaron Anderson Democratic Delegate - Mary Jones Delegate - Paul Herrera</p> <p><input type="checkbox"/> Brian Baxr Non-Partisan Delegate - Howard Vallejo Delegate - Paula Tufts</p> <p><input type="checkbox"/> Carl Carlson Libertarian Delegate - James Smitt Delegate - Brenda Faye</p> <p><input type="checkbox"/> Write-in</p>		<p><b>State Treasurer</b> Vote for One</p> <p><input type="checkbox"/> Frances Feeney Democratic</p> <p><input checked="" type="checkbox"/> George Gibson Republican</p> <p><input type="checkbox"/> Write-in</p>		
	<p><b>Attorney General</b> Vote for One</p> <p><input type="checkbox"/> Paula Motegna Democratic</p> <p><input type="checkbox"/> Quinn Vallejo Republican</p>		<p><b>Board of Education</b> Vote for Three</p> <p><input type="checkbox"/> Jerry Johnson Non-Partisan</p> <p><input type="checkbox"/> Howard Henderson Non-Partisan</p> <p><input type="checkbox"/> Paula Peterson Non-Partisan</p> <p><input type="checkbox"/> Yolanda Young Non-Partisan</p> <p><input type="checkbox"/> Walter Wright Non-Partisan</p> <p><input type="checkbox"/> Bob Benson Non-Partisan</p> <p><input type="checkbox"/> Write-in</p>		
			<p><input type="checkbox"/> Write-in</p> <p><input type="checkbox"/> Write-in</p>		

**Vote Both Sides**

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## ***Straight Party Contests (continued)***

### **The Ballot on the Opposite Page:**

#### **“Straight Party” Contest:**

- Ballot Now reads the contest as an undervote. It is available for resolution, but it will not be highlighted in yellow for resolution.

#### **Remaining Contests:**

- Initially, Ballot Now reads all other contests on this page as undervotes. These contests are available for resolution, and they are highlighted in yellow for resolution. The undervoted contests associated with the straight party contest are resolved if the straight party contest is resolved by selecting a candidate in order to resolve *that* undervote.

Ballot Now **straight party contest** resolution examples, continued

Vote Both Sides		
<p><b>Official Ballot</b>  <b>Sample County General</b>  <b>Sample County</b>  <b>November 07, 2006</b></p> <p style="text-align: right;">Precinct <b>2003-2003-A</b></p>		
<p><b>Instructions:</b>                  Use a black pen to fill in the box next to your choice.</p> <p><b>STRAIGHT PARTY</b>                  Voting for a party automatically marks all candidates that have been assigned to that party in contests where straight-party voting is allowed.</p> <p><input checked="" type="checkbox"/> Democratic</p> <p><input type="checkbox"/> Republican</p> <p><input type="checkbox"/> Libertarian</p>	<p><b>FEDERAL</b></p> <p><b>U.S. Senator</b>                  Vote for One</p> <p><input type="checkbox"/> Aaron Anderson                  Democratic                  Delegate - Mary Jones                  Delegate - Paul Herrera</p> <p><input type="checkbox"/> Brian Baxr                  Non-Partisan                  Delegate - Howard Vallejo                  Delegate - Paula Tufts</p> <p><input type="checkbox"/> Carl Carlson                  Libertarian                  Delegate - James Smitt                  Delegate - Brenda Faye</p> <p><input type="checkbox"/> Write-in</p>	<p><b>STATE</b></p> <p><b>State Treasurer</b>                  Vote for One</p> <p><input type="checkbox"/> Frances Feeney                  Democratic</p> <p><input type="checkbox"/> George Gibson                  Republican</p> <p><input type="checkbox"/> Write-in</p> <hr/> <p><b>Attorney General</b>                  Vote for One</p> <p><input type="checkbox"/> Paula Motegna                  Democratic</p> <p><input type="checkbox"/> Quinn Vallejo                  Republican</p> <hr/> <p><b>Board of Education</b>                  Vote for Three</p> <p><input checked="" type="checkbox"/> Jerry Johnson                  Non-Partisan</p> <p><input type="checkbox"/> Howard Henderson                  Non-Partisan</p> <p><input checked="" type="checkbox"/> Paula Peterson                  Non-Partisan</p> <p><input type="checkbox"/> Yolanda Young                  Non-Partisan</p> <p><input type="checkbox"/> Walter Wright                  Non-Partisan</p> <p><input type="checkbox"/> Bob Benson                  Non-Partisan</p> <p><input type="checkbox"/> Write-in</p> <hr/> <p><input type="checkbox"/> Write-in</p> <hr/> <p><input type="checkbox"/> Write-in</p>
Vote Both Sides		

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## ***Straight Party Contests (continued)***

### **The Ballot on the Opposite Page:**

#### **“Straight Party” Contest:**

- Ballot Now reads the straight party contest as an undervote, but it will not be highlighted in yellow for resolution. Resolution of this contest is not necessary, since the voter marked all straight-party associated contests individually.

#### **Remaining Contests:**

- Ballot Now reads all other contests on this page as marked by the voter. All are valid votes for an option on the ballot, except for “Board of Education,” which is an undervote.

Ballot Now **straight party contest** resolution examples, continued

Vote Both Sides		
<p style="text-align: center;"><b>Official Ballot</b>  <b>Sample County General</b>  <b>Sample County</b>  <b>November 07, 2006</b> <span style="float: right;">Precinct <b>2003-2003-A</b></span></p>		
<p><b>Instructions:</b> Use a black pen to fill in the box next to your choice.</p> <p><b>STRAIGHT PARTY</b> Voting for a party automatically marks all candidates that have been assigned to that party in contests where straight-party voting is allowed.</p> <p><input type="checkbox"/> Democratic  <input type="checkbox"/> Republican  <input type="checkbox"/> Libertarian</p>	<p><b>FEDERAL</b></p> <p><b>U.S. Senator</b> Vote for One</p> <p><input checked="" type="checkbox"/> Aaron Anderson Democratic Delegate - Mary Jones Delegate - Paul Herrera</p> <p><input type="checkbox"/> Brian Baxr Non-Partisan Delegate - Howard Vallejo Delegate - Paula Tufts</p> <p><input type="checkbox"/> Carl Carlson Libertarian Delegate - James Smitt Delegate - Brenda Faye</p> <p><input type="checkbox"/> Write-in</p>	<p><b>STATE</b></p> <p><b>State Treasurer</b> Vote for One</p> <p><input checked="" type="checkbox"/> Frances Feeney Democratic</p> <p><input type="checkbox"/> George Gibson Republican</p> <p><input type="checkbox"/> Write-in</p> <hr/> <p><b>Attorney General</b> Vote for One</p> <p><input checked="" type="checkbox"/> Paula Motegna Democratic</p> <p><input type="checkbox"/> Quinn Vallejo Republican</p> <hr/> <p><b>Board of Education</b> Vote for Three</p> <p><input type="checkbox"/> Jerry Johnson Non-Partisan</p> <p><input type="checkbox"/> Howard Henderson Non-Partisan</p> <p><input type="checkbox"/> Paula Peterson Non-Partisan</p> <p><input type="checkbox"/> Yolanda Young Non-Partisan</p> <p><input type="checkbox"/> Walter Wright Non-Partisan</p> <p><input type="checkbox"/> Bob Benson Non-Partisan</p> <p><input type="checkbox"/> Write-in</p> <hr/> <p><input type="checkbox"/> Write-in</p> <hr/> <p><input type="checkbox"/> Write-in</p>
Vote Both Sides		

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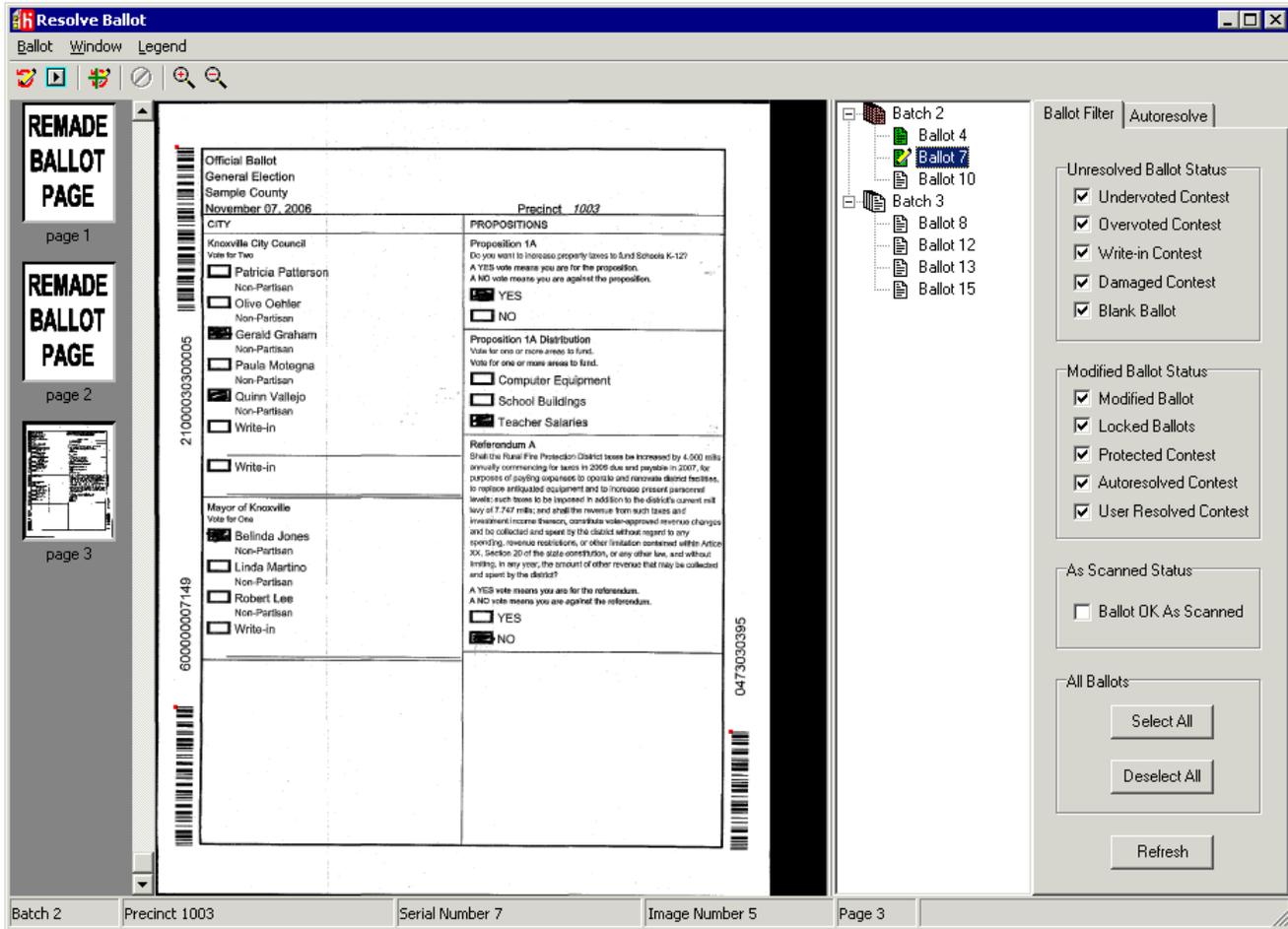
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## Orphaned Ballot Sheets

When the **Accept Orphan Ballot Sheets** checkbox is selected on the **Scanner Setup** tab of the **Program Options** window, Ballot Now accepts multi-sheet ballots with missing leading sheets in the scan batch. Ballot Now creates “REMADE BALLOT PAGE” thumbnails for the missing sheets in the **Resolve Ballot** window. These thumbnails are placeholders and cannot be viewed at full size.

After resolving the ballots, write the CVRs from orphaned and incomplete ballots to the MBB as you would complete ballots.

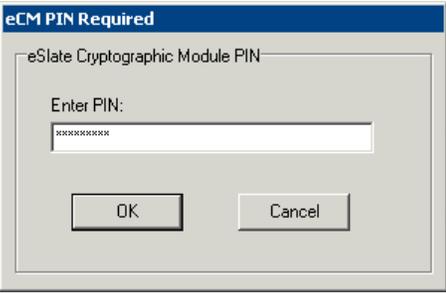


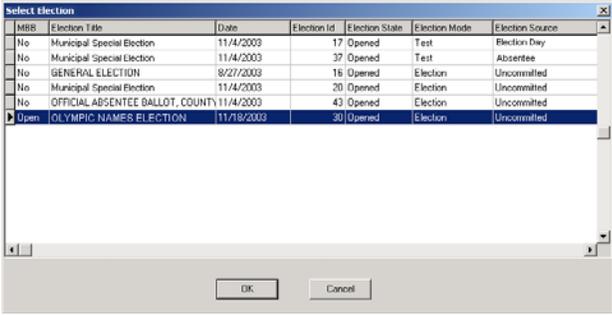
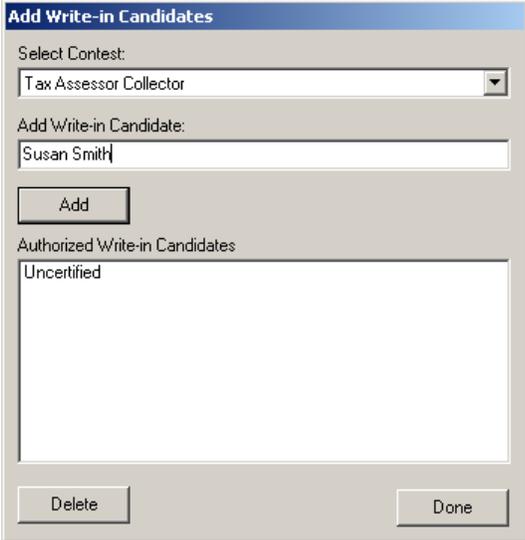
**Note:** You can save the CVRs from incomplete and orphaned ballots to the MBB

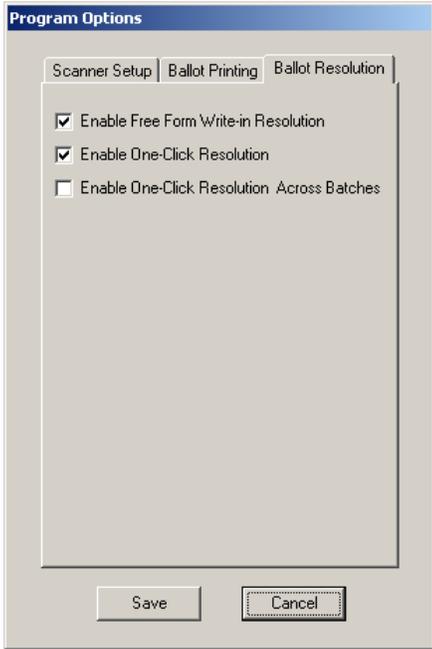
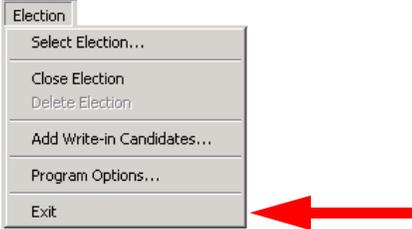
## Part 3: General Steps for Resolving Ballots

### Prepare for Write-In Resolution, if Applicable

If the ballots being resolved include write-in candidate options, complete the following steps before resolving.

<b>Steps:</b>	<b>Details:</b>
<p>1. Open Ballot Now and log in as a user with Administrator permissions.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Double-click the Ballot Now shortcut on the desktop or go to <b>Start/Programs/Hart InterCivic/Ballot Now</b>.</li> <li><input type="checkbox"/> If using a client-server Ballot Now setup, log in to the server only at this time.</li> </ul>
<p>2. Insert the eCM into a USB port.</p> 	<p>USB ports are identified with this symbol:</p> 
<p>3. Insert the MBB designated for Ballot Now into the card device and select the election.</p> 	<p>Go to the <b>Election</b> menu and click <b>Select Election</b>.</p>
<p>4. When prompted, enter the eCM PIN and click <b>OK</b>.</p> 	

<b>Steps:</b>	<b>Details:</b>																																																	
<p>5. In the <b>Select Election</b> window, highlight the target election and click <b>OK</b>.</p>  <table border="1" data-bbox="126 300 738 615"> <thead> <tr> <th>MBB</th> <th>Election Title</th> <th>Date</th> <th>Election Id</th> <th>Election State</th> <th>Election Mode</th> <th>Election Source</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>Municipal Special Election</td> <td>11/4/2003</td> <td>17</td> <td>Opened</td> <td>Test</td> <td>Election Day</td> </tr> <tr> <td>No</td> <td>Municipal Special Election</td> <td>11/4/2003</td> <td>37</td> <td>Opened</td> <td>Test</td> <td>Absentee</td> </tr> <tr> <td>No</td> <td>GENERAL ELECTION</td> <td>8/27/2003</td> <td>16</td> <td>Opened</td> <td>Election</td> <td>Uncommitted</td> </tr> <tr> <td>No</td> <td>Municipal Special Election</td> <td>11/4/2003</td> <td>20</td> <td>Opened</td> <td>Election</td> <td>Uncommitted</td> </tr> <tr> <td>No</td> <td>OFFICIAL ABSENTEE BALLOT, COUNTY</td> <td>11/4/2003</td> <td>43</td> <td>Opened</td> <td>Election</td> <td>Uncommitted</td> </tr> <tr> <td>Open</td> <td>OLYMPIC NAMES ELECTION</td> <td>11/18/2003</td> <td>30</td> <td>Opened</td> <td>Election</td> <td>Uncommitted</td> </tr> </tbody> </table>	MBB	Election Title	Date	Election Id	Election State	Election Mode	Election Source	No	Municipal Special Election	11/4/2003	17	Opened	Test	Election Day	No	Municipal Special Election	11/4/2003	37	Opened	Test	Absentee	No	GENERAL ELECTION	8/27/2003	16	Opened	Election	Uncommitted	No	Municipal Special Election	11/4/2003	20	Opened	Election	Uncommitted	No	OFFICIAL ABSENTEE BALLOT, COUNTY	11/4/2003	43	Opened	Election	Uncommitted	Open	OLYMPIC NAMES ELECTION	11/18/2003	30	Opened	Election	Uncommitted	
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<p>6. Remove the eCM.</p> 	<p>Store the eCM in a secure location separate from the MBBs.</p>																																																	
<p>7. Define write-in candidates, if applicable.</p> 	<p><input type="checkbox"/> Go to the <b>Election</b> menu and click <b>Add Write-In Candidates</b>.</p> <ul style="list-style-type: none"> <li>Select a contest and define write-in candidates who are certified and/or who are known and for whom cast votes will be counted.</li> </ul>																																																	

<b>Steps:</b>	<b>Details:</b>
<p>8. Set up <b>Program Options</b> for ballot resolution, if applicable.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Go to the <b>Election</b> menu, click <b>Program Options</b>, and click the <b>Ballot Resolution</b> tab. <ul style="list-style-type: none"> <li>• Select the checkbox to allow free form write-ins, as applicable.</li> <li>• Select the checkbox to allow one-click resolution, as applicable. <ul style="list-style-type: none"> <li>&gt; When this box is checked, the next unresolved contest is automatically displayed in the <b>Resolve Ballot</b> window as soon as the previous contest is resolved.</li> </ul> </li> <li>• Select the checkbox to allow one-click resolution across batches, as applicable. <ul style="list-style-type: none"> <li>&gt; When this box is checked, the next unresolved contest in the next batch is automatically displayed in the <b>Resolve Ballot</b> window as soon as the last contest in the previous batch is resolved.</li> </ul> </li> </ul> </li> </ul> <p><b>Note:</b> You cannot use one-click resolution in contests that have unresolved write-ins or in straight party contests with overvotes.</p>
<p>9. Exit Ballot Now.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Go to the <b>Election</b> menu and click <b>Exit</b>, if resolving in a separate session.</li> <li><input type="checkbox"/> <i>OR</i> go to the <b>Admin</b> menu, click <b>Logout</b>, and then allow another user to <b>Login</b> before continuing to “Resolution Steps” on page 74.</li> <li><input type="checkbox"/> <i>OR</i> continue to “Resolution Steps” on page 74.</li> </ul>

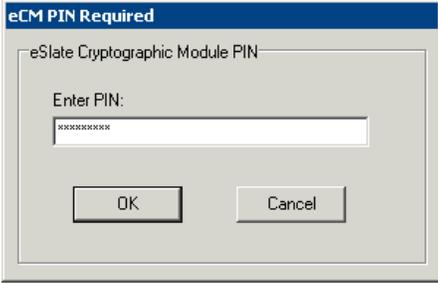
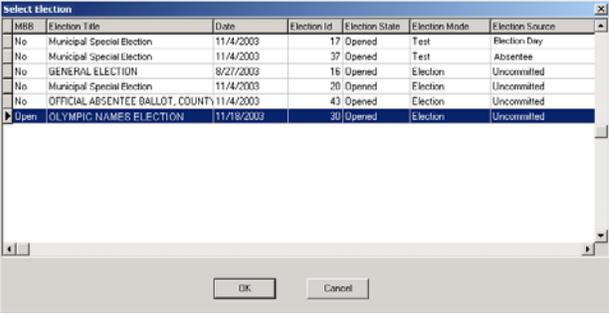
## Resolution Steps

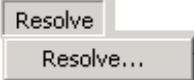
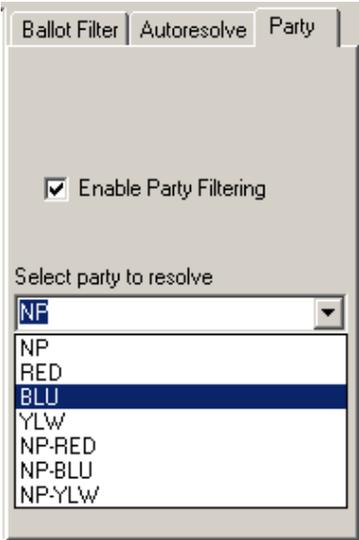
Resolution steps are presented here in a brief, list format.

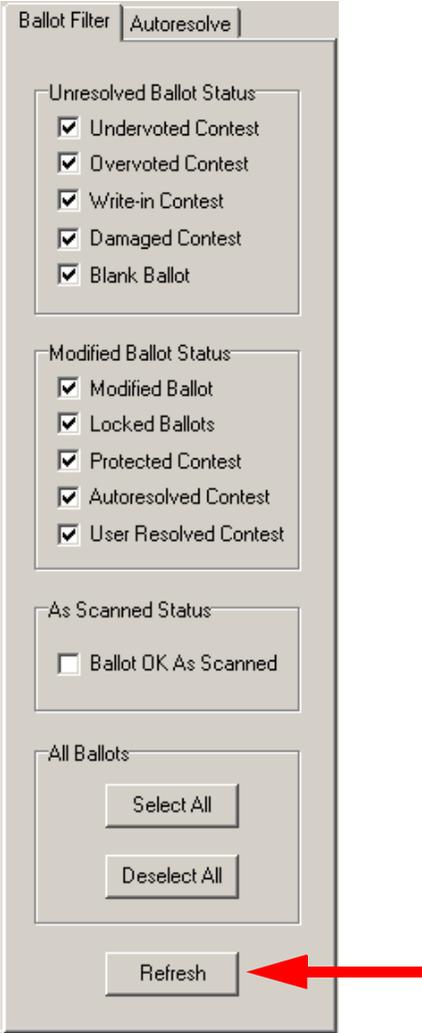
**See:**

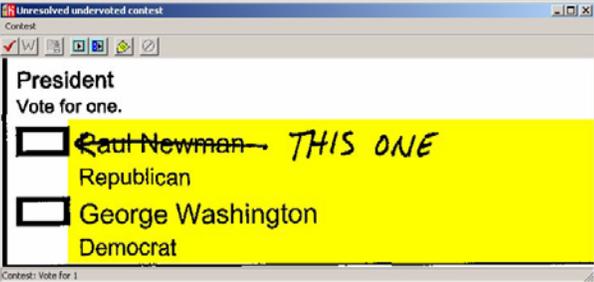
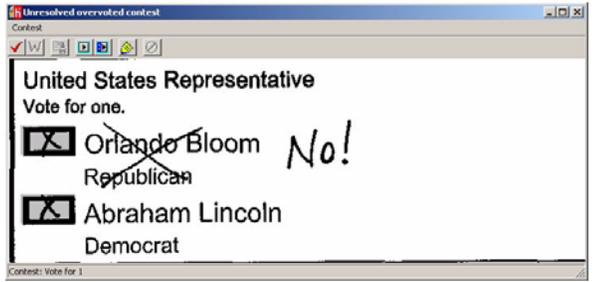
“Part 4: Detailed Steps for Resolving Ballots” on page 80 for specific resolution instructions. The “Detailed Steps for Resolving Ballots” section is designed for resolution team use. That section may be reproduced in color for team members.

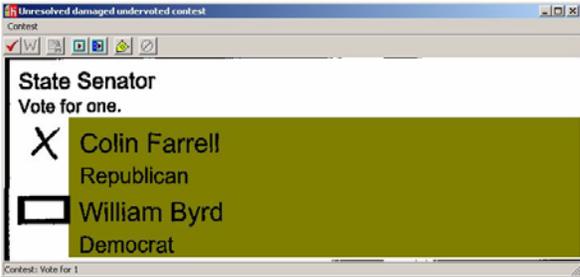
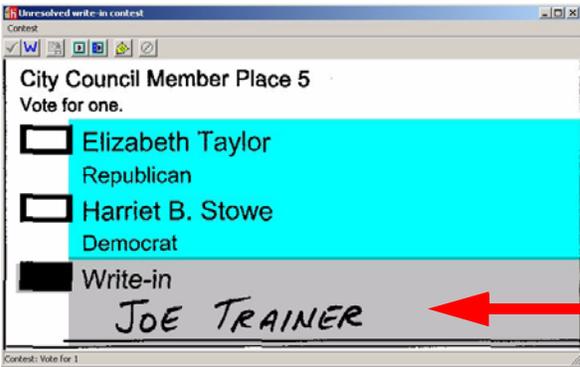
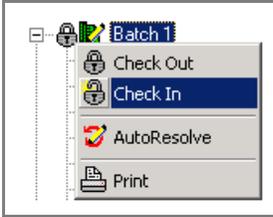
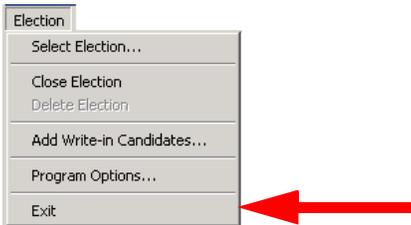
<b>Steps:</b>	<b>Details:</b>
<p>1. Open Ballot Now and log in as a user with Administrator or Resolution Board permissions.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Double-click the Ballot Now shortcut on the desktop or go to <b>Start/Programs/Hart InterCivic/Ballot Now</b>.</li> <li><input type="checkbox"/> If using a client-server Ballot Now setup, log in to the server only at this time.</li> </ul>
<p>2. If using a client-server Ballot Now setup, clients can now log in.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> At the client station:             <ul style="list-style-type: none"> <li>• Double-click the Ballot Now shortcut</li> <li>• Log in</li> <li>• Establish connection to the server IP address, if necessary</li> <li>• Accept server certificate, if necessary</li> </ul> </li> <li><input type="checkbox"/> At the server station:             <ul style="list-style-type: none"> <li>• Accept the client certificate, if necessary.</li> </ul> </li> </ul> <p><b>See:</b> “Appendix C: Hart Voting System Software User Tips” on page 119.</p>
<p>3. Insert the eCM into a USB port (Stand-alone/Server PC only).</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> USB ports are identified with this symbol:              </li> <li><input type="checkbox"/> Client PCs do not use either the eCM or the MBB directly.</li> </ul>
<p>4. Insert the MBB designated for Ballot Now into the card device, and then go to the <b>Election</b> menu and click <b>Select Election</b> (Stand-alone/Server PC only).</p> 	

<b>Steps:</b>	<b>Details:</b>
<p>5. When prompted, enter the eCM PIN and click <b>OK</b> (Stand-alone/Server PC only).</p> 	
<p>6. In the <b>Select Election</b> window, highlight the target election and click <b>OK</b> (Stand-alone/Server PC only).</p> 	<p><b>Note:</b> Client users can <u>log in</u> either before or after the election has been selected on the server.</p>
<p>7. Remove the eCM (Stand-alone/Server PC only).</p> 	<p>Store the eCM in a secure location separate from the MBBs.</p>
<p>8. If using a client-server Ballot Now setup, clients can now select the election.</p> 	<p>From client station(s), go to the <b>Election</b> menu and click <b>Select Election</b>.</p>
<p>9. (Optional) Print a “Zero Report” (Stand-alone/Server PC only).</p> 	<p>Go to the <b>Reports</b> menu and click <b>Election Report</b>.</p> <p><b>Note:</b> Some jurisdictions request a “Zero Report” for Ballot Now at intervals to show that there are no CVRs already saved in the system. The “Election Report”, printed before saving resolved batches to card, reflects this.</p>

<b>Steps:</b>	<b>Details:</b>
<p>10. Go to the <b>Resolve</b> menu and click <b>Resolve</b>.</p> 	<p>All remaining steps apply to stand-alone, server, and client stations.</p>
<p>11. If working with a primary election, set the <b>Party</b> filter to show ballots appropriate for the resolution team member at that station.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> In the <b>Resolve Ballot</b> window, click the <b>Party</b> tab (not available for non-primary elections).</li> <li><input type="checkbox"/> The <b>Party</b> tab includes: <ul style="list-style-type: none"> <li>• <b>Enable Party Filtering</b> – check to enable ballot resolvers to view only the selected party ballots</li> <li>• <b>Select Party to resolve</b> - click the drop-down menu and choose the party for ballots to display</li> </ul> </li> </ul> <p><b>Note:</b></p> <p>Leave the <b>Enable Party Filtering</b> checkbox unchecked in order to view all ballots.</p> <p><b>Select Party to Resolve</b> window displays party codes, not full party names.</p>

<b>Steps:</b>	<b>Details:</b>
<p>12. On the <b>Ballot Filter</b> tab, select all of the checkboxes except <b>Ballot OK As Scanned</b> and click the <b>Refresh</b> button.</p> 	<p><input type="checkbox"/> In the <b>Resolve Ballot</b> window, click the <b>Ballot Filter</b> tab.</p> <p><b>Tip(s):</b> Instead of selecting each checkbox, click <b>Select All</b>, click the <b>Ballot OK As Scanned</b> checkbox to deselect that item while leaving all other filters selected, and then click <b>Refresh</b></p>
<p>13. Select batch(es) targeted for resolution.</p> 	<p>Right-click and check out batches if multiple users are performing ballot resolution.</p>

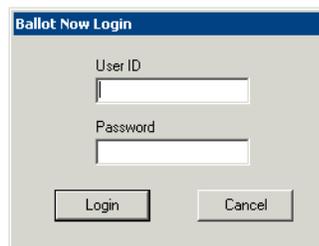
Steps:	Details:
<p>14. Resolve batches sorted for AutoResolve.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> In the <b>Resolve Ballot</b> window, click the <b>AutoResolve</b> tab.</li> <li><input type="checkbox"/> The <b>AutoResolve</b> tab includes:             <ul style="list-style-type: none"> <li>• <b>Undervotes</b> – check to filter for those contests with fewer than the allowable number of options marked</li> <li>• <b>Overvotes</b> – check to filter for those contests with greater than the allowable number of options marked</li> <li>• <b>Damaged Contests</b> – check to filter for those contests where Ballot Now cannot locate the option box due to ballot damage (records as an undervote)</li> <li>• <b>Show Progress</b> - check to view AutoResolve process on screen</li> <li>• <b>Start Autoresolve</b> button - click to AutoResolve a selected batch or ballot</li> </ul> </li> <li><input type="checkbox"/> Click the <b>AutoResolve All</b> tool to AutoResolve all scanned batches. </li> </ul> <p><b>See:</b>  “Part 2: How Ballot Now Reads Marked Ballots, A Reference” on page 54.</p>
<p>15. Manually resolve (other) undervotes.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Manually resolve those undervotes not AutoResolved.             <ul style="list-style-type: none"> <li>• Click  to confirm</li> <li>• OR double-click to mark options not read by Ballot Now.</li> </ul> </li> </ul>
<p>16. Manually resolve (other) overvotes.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Manually resolve those overvotes not AutoResolved.             <ul style="list-style-type: none"> <li>• Click  to confirm</li> <li>• OR right-click and choose <b>Deselect</b> in order to deselect options that should not be recorded                 <ul style="list-style-type: none"> <li>&gt; In the example shown here, <i>deselecting</i> “Orlando Bloom” resolves the overvote and assigns the vote to “Abraham Lincoln”.</li> </ul> </li> </ul> </li> </ul>

<b>Steps:</b>	<b>Details:</b>
<p>17. Manually resolve (other) damaged contests.</p> 	<p><input type="checkbox"/> Manually resolve those damaged contests not AutoResolved.</p> <ul style="list-style-type: none"> <li>Click  to confirm and record as undervotes</li> <li>OR double-click to mark options not read by Ballot Now.</li> </ul>
<p>18. If applicable, resolve write-in votes.</p> 	<p>Click  OR double-click in the gray write-in area to open the <b>Resolve Write-in</b> window.</p> 
<p>19. When finished resolving batches, <u>Ctrl</u>-click to select multiple checked out resolved batches in the selection tree, and then right-click and choose <b>Check In</b>.</p> 	
<p>20. Close the <b>Resolve Ballot</b> window.</p> 	<p>Go to the <b>Ballot</b> menu and click <b>Close</b>, or click the window's close icon.</p>
<p>21. Exit Ballot Now.</p> 	<p><input type="checkbox"/> Go to the <b>Election</b> menu and click <b>Exit</b>.</p> <p><input type="checkbox"/> Do not exit Ballot Now on a server unless resolution at client stations is completed.</p> <p><b>Tip(s):</b> In a client-server setup, it is best to exit Ballot Now on the client station(s) first, then at the server.</p>

## Part 4: Detailed Steps for Resolving Ballots

Resolution steps are presented here in detail. Screen shots and instructions present recommended steps to accomplish resolution. Prerequisite steps for identifying certified and free form write-in candidates should be accomplished before proceeding, if there are write-in options on the ballots.

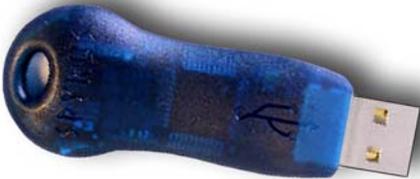
1. Open Ballot Now and log in. If using a client-server Ballot Now setup, log in to the server first.



2. If using a client-server Ballot Now setup, clients can now log in.



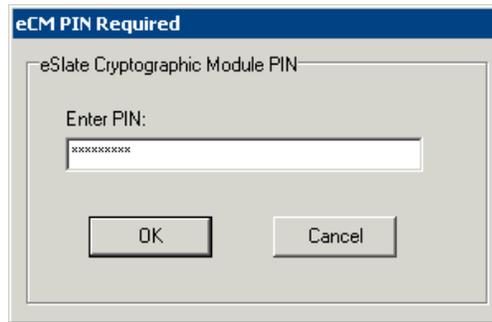
3. Insert the eCM into a USB port (Stand-alone/Server PC only).



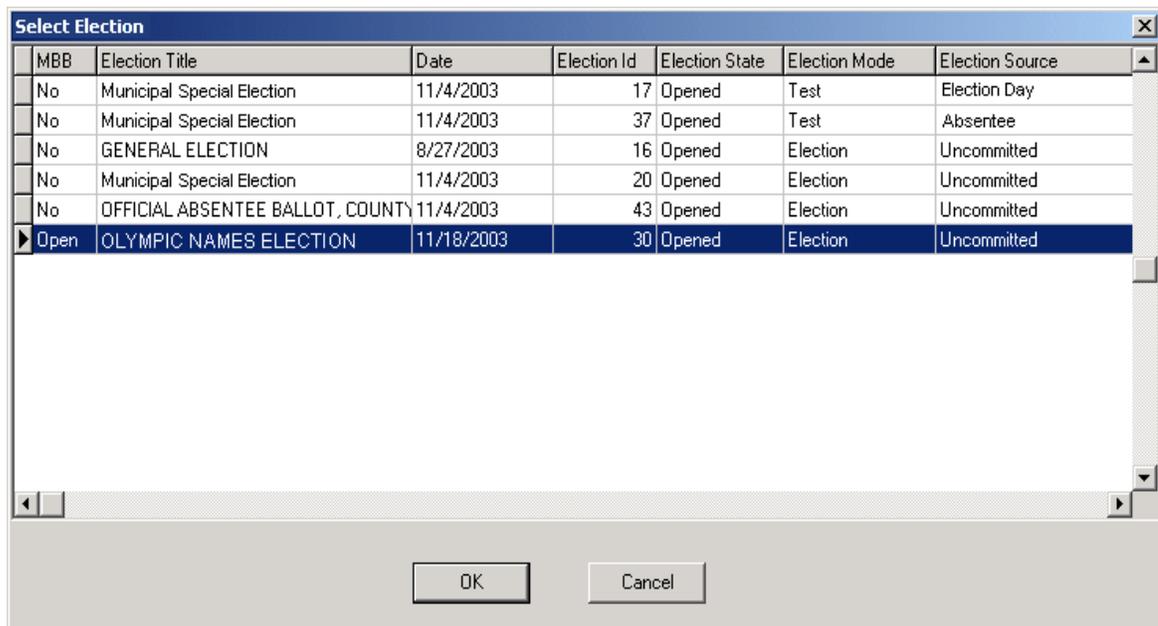
4. Insert the MBB designated for Ballot Now into the card device (Stand-alone/Server PC only).



5. When prompted, enter the eCM PIN and click **OK** (Stand-alone/Server PC only).



6. Select the election for that MBB and click **OK** (Stand-alone/Server PC only).



7. Remove the eCM and store in a separate location from the MBBs (Stand-alone/Server PC only).



8. If using a client-server Ballot Now setup, clients can now select the election.



**See:**

“Ballot Now Client-Server Management” on page 20 for information about the client-server Ballot Now setup.

9. (Optional) Print a “Zero Report” (Stand-alone/Server PC only).



**Note:**

All remaining steps apply to stand-alone, server, and client stations.

10. Go to the **Resolve** menu and click **Resolve**.



11. If working with a primary election, set the **Party** filter to show ballots appropriate for the resolution team member at that station.

**Note:**

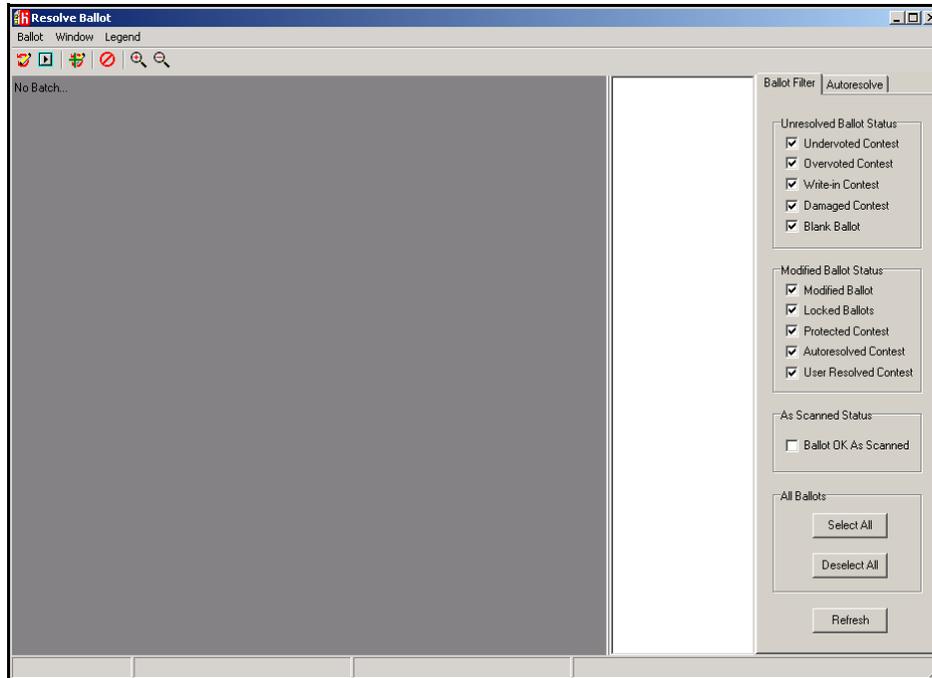
Before resolving ballots, go to the **Legend** menu and click **View Legend** to view the color code and definition for each contest.

## 12. Resolve batches sorted for AutoResolve.

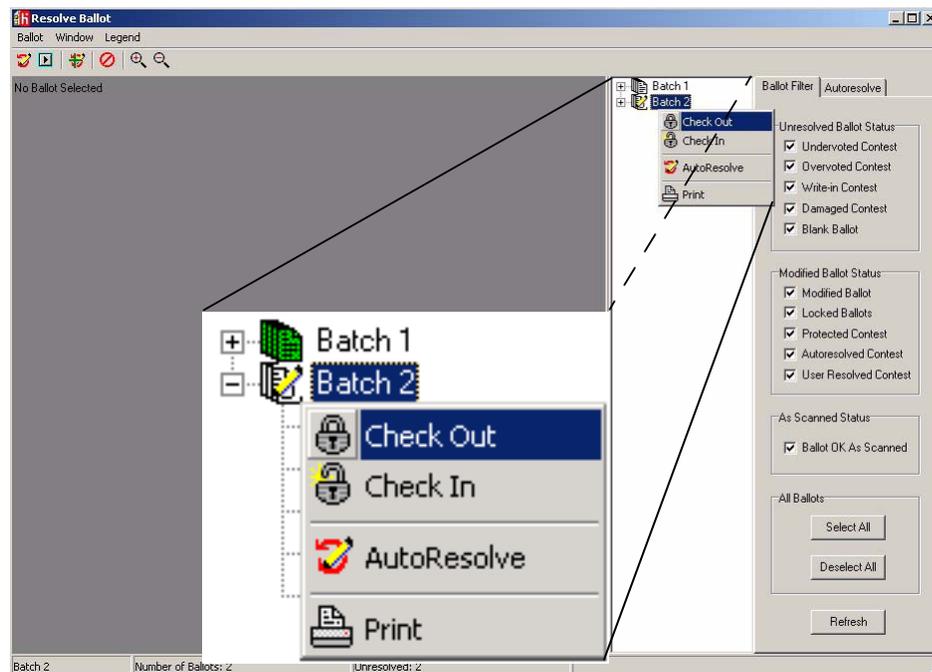
- 12.1 On the **Ballot Filter** tab, select all of the checkboxes except **Ballot OK As Scanned**.
- 12.2 Click the **Refresh** button.

### Tip(s):

Instead of selecting each checkbox, click **Select All**, click the **Ballot OK As Scanned** checkbox to deselect that item while leaving all other filters selected, and then click **Refresh**.



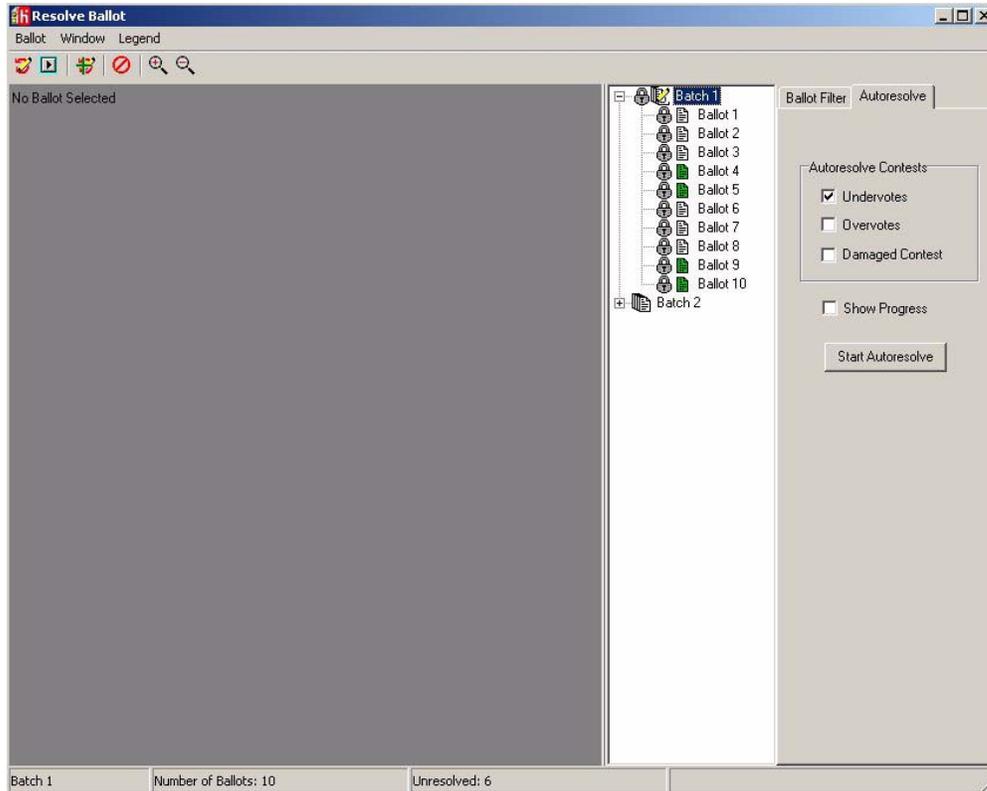
- 12.3 Left-click to select the target batch. Right-click the target batch in the selection tree and choose **Check Out**.



### Note:

If operating a Ballot Now system that is not set up for client-server use or multiple resolution team member users, it is not necessary to check ballots out or in.

12.4 On the **AutoResolve** tab, click checkboxes to select all appropriate filters for the batch.



12.5 Click the target batch to select it, and click **Start AutoResolve**, or click the **AutoResolve** tool.



12.6 OR click the **AutoResolve All** tool to AutoResolve all scanned batches.



12.7 After AutoResolve is complete, open the batch in the selection tree if necessary (click the +), and manually resolve any ballots that do not indicate the bright green “resolved” color.

**See:**

The following pages for manual resolution steps.

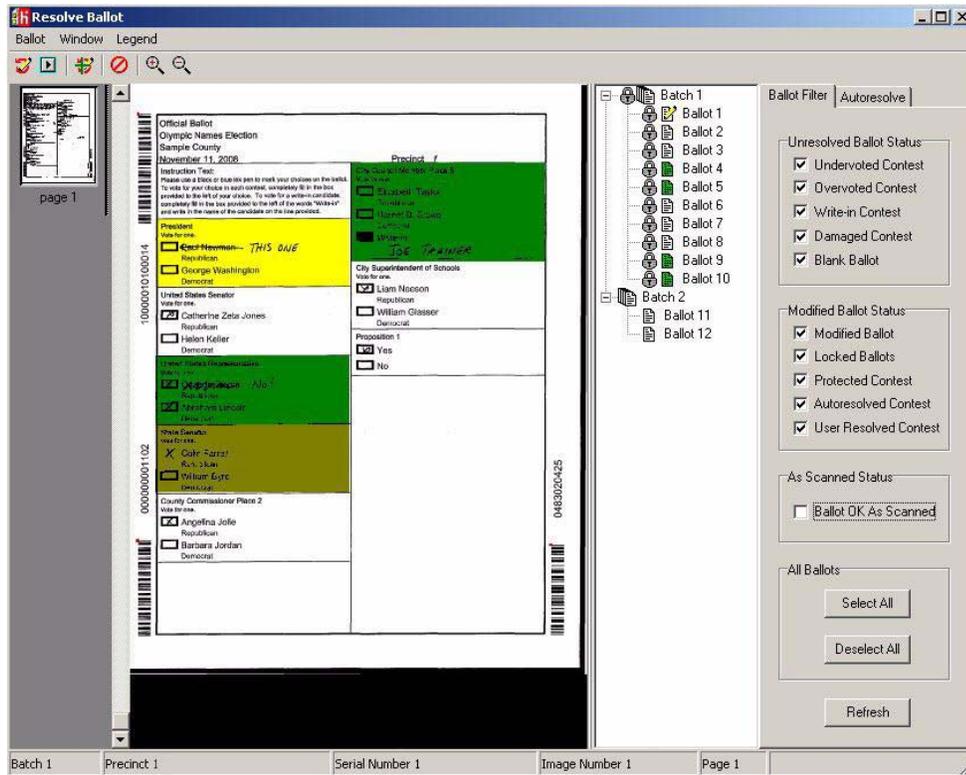
12.8 When finished resolving a batch, left-click to select the target batch. Right-click the target batch in the selection tree and choose **Check In**.



## 13. Manually resolve (other) undervotes.

13.1 Left-click to select the target batch. Right-click the target batch in the selection tree and choose **Check Out**.

13.2 Select the ballot images in the tree, stopping at those requiring resolution.



13.3 To resolve an undervoted contest, double-click a yellow contest in the left panel.

13.4 Double-click in a white option box to select that option, as voter intent indicates.

**Note:**

The **Contest** window title bar identifies the contest status.

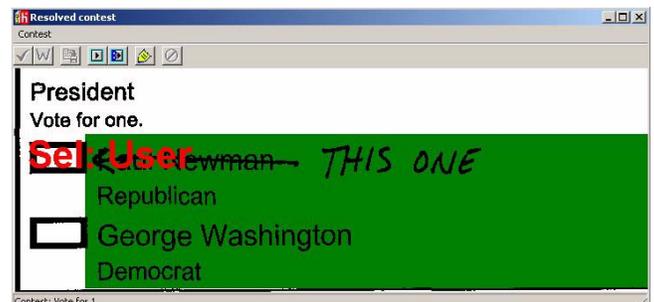
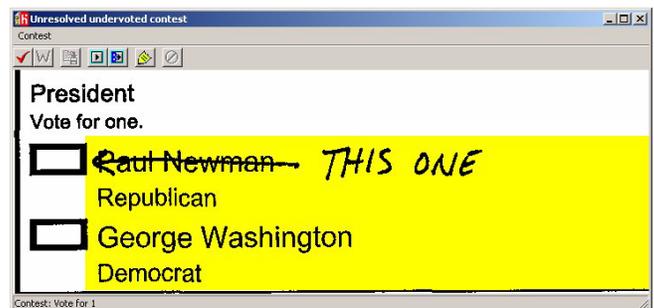
13.5 If you have not enabled one-click resolution, click the **Save** and **Next Contest** tools



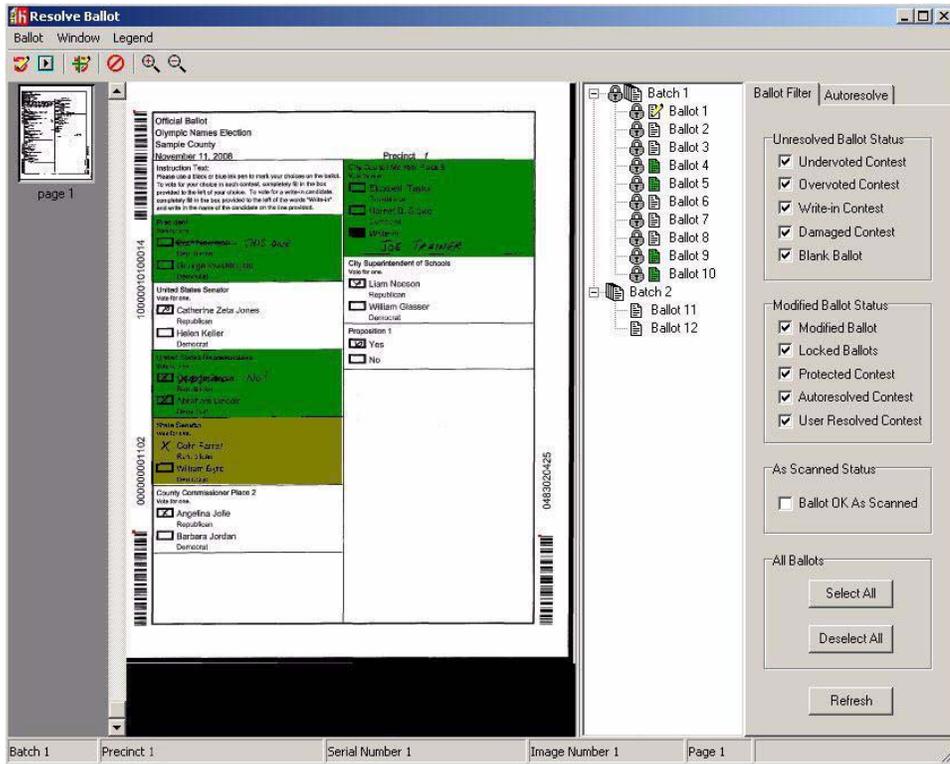
(or save and close the **Contest** window).

**Note:**

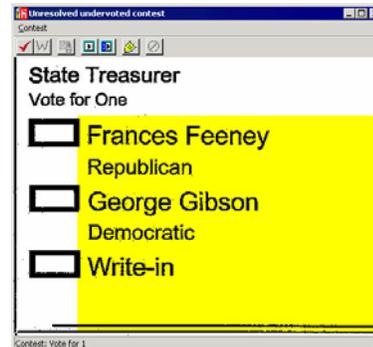
The **Contest** window title bar updates to identify the change in contest status.



13.6 In the **Resolve Ballot** window, the resolved undervoted contest is now the bright green “resolved” color.



- A. To manually resolve a clearly undervoted contest with no voter intent issues, double-click the contest and click the **Confirm** tool.



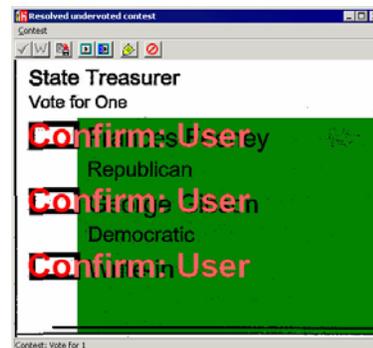
- B. The undervote is confirmed. The contest is recorded as an undervote, with no option receiving a valid mark.

- C. If you have not enabled one-click resolution, click the

**Save and Next Contest** tools



(or save and close the **Contest** window).



**Tip(s):**

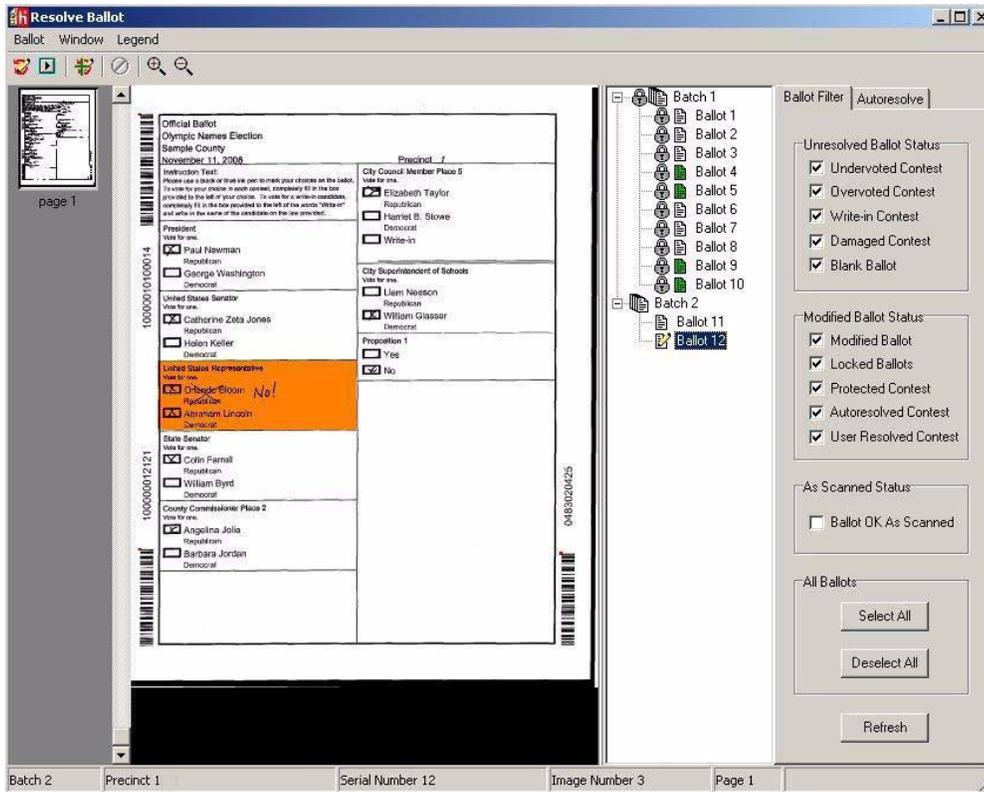
Instead of using the **Next Contest** tool, exit each contest after manually resolving and saving. View each ballot from the **Resolve Ballot** window, and select only contests needing intent decisions on that ballot. Next, set the **AutoResolve** filter, and use the **AutoResolve** tool to resolve any clear undervotes and overvotes on the ballot. Save and go to the next ballot.



14. Manually resolve (other) overvotes.

14.1 If you haven't already done so, left-click to select the target batch. Right-click the target batch in the selection tree and choose **Check Out**.

14.2 Select the ballot images in the tree, stopping at those requiring resolution.



14.3 To resolve an overvoted contest, double-click an orange contest.

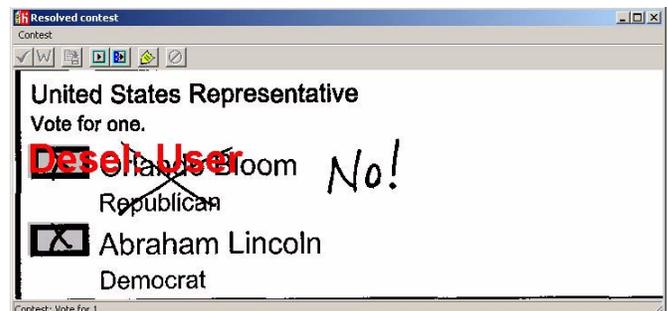
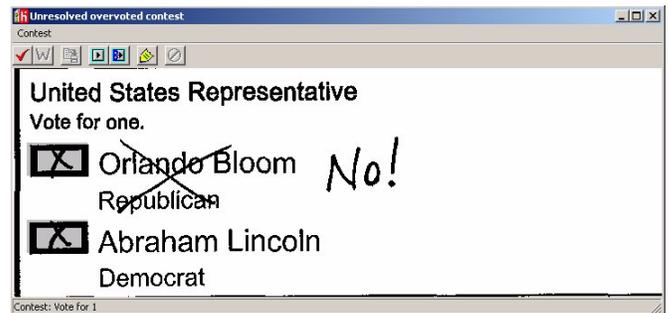
14.4 Right-click in a gray option box and choose **Deselect** in order to deselect options, as voter intent indicates.

14.5 If you have not enabled one-click resolution, click the **Save** and **Next Contest** tools

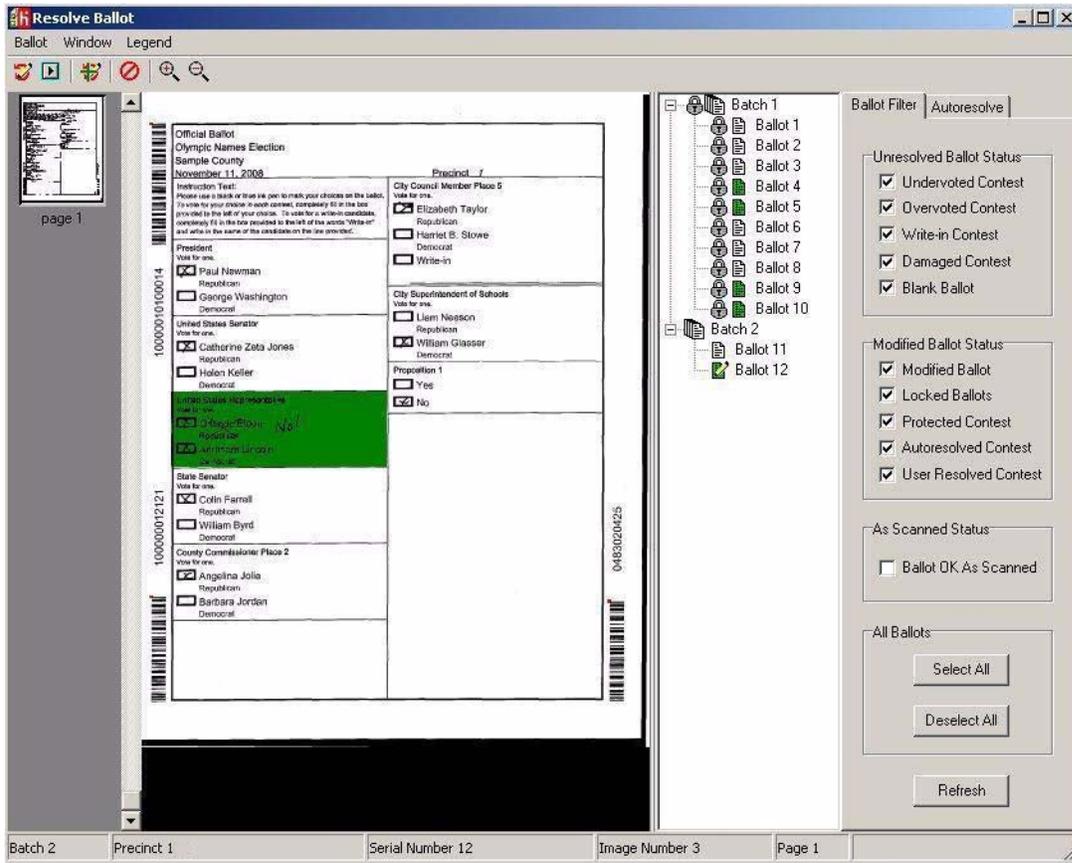


(or save and close the **Contest** window).

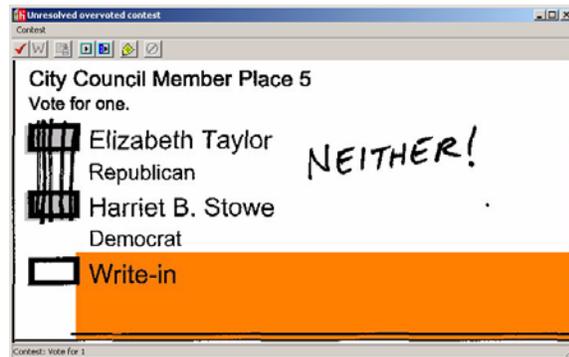
In this example, deselecting "Orlando Bloom" resolves the overvote and assigns the vote to "Abraham Lincoln".



14.6 In the **Resolve Ballot** window, the resolved overvoted contest is now the bright green “resolved” color.



- A. To manually resolve a clearly overvoted contest with no voter intent issues, double-click the contest and click the **Confirm** tool.



- B. The overvote is confirmed. The contest is recorded as an overvote, with no option receiving a valid mark.

- C. If you have not enabled one-click resolution, click the **Save and Next**

**Contest tools**

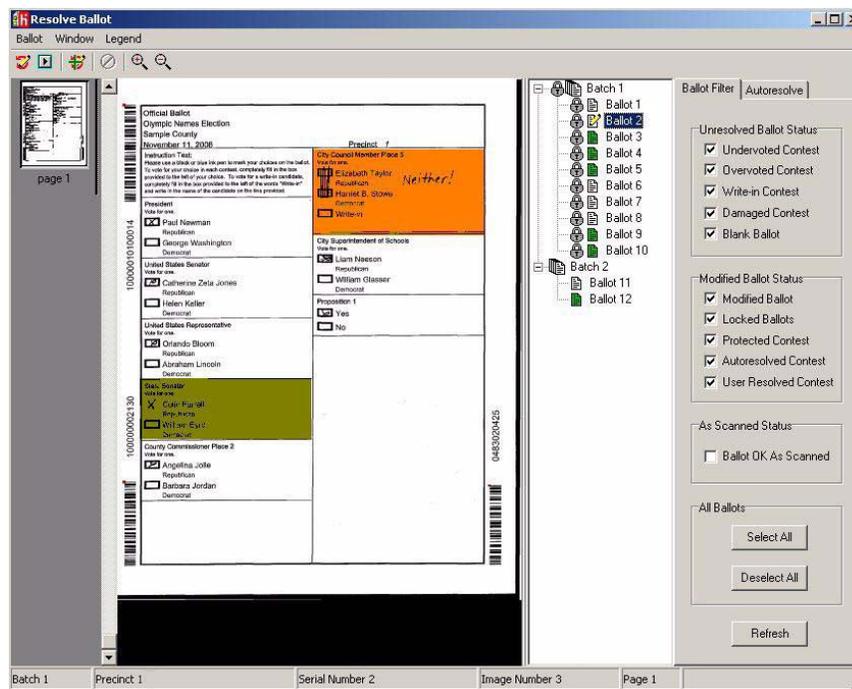


(or save and close the **Contest** window).



## 15. Manually resolve (other) damaged contests.

- 15.1 If not already accomplished, left-click to select the target batch. Right-click the target batch in the selection tree and choose **Check Out**.
- 15.2 Select the ballot images in the tree, stopping at those requiring resolution.



### 15.3 To resolve a damaged contest, double-click an avocado contest.



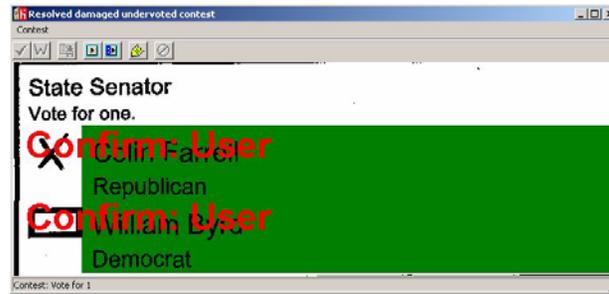
### 15.4 Notice that the damaged contest is missing an option box. In this example the option box has been removed with a white-out product.

### 15.5 To select an option, double-click in the location where that option box should be.



In this example, the option with the missing box has been selected by the Ballot Now operator.

15.6 OR to confirm the damaged contest and record this as an undervote, click the **Confirm** tool.



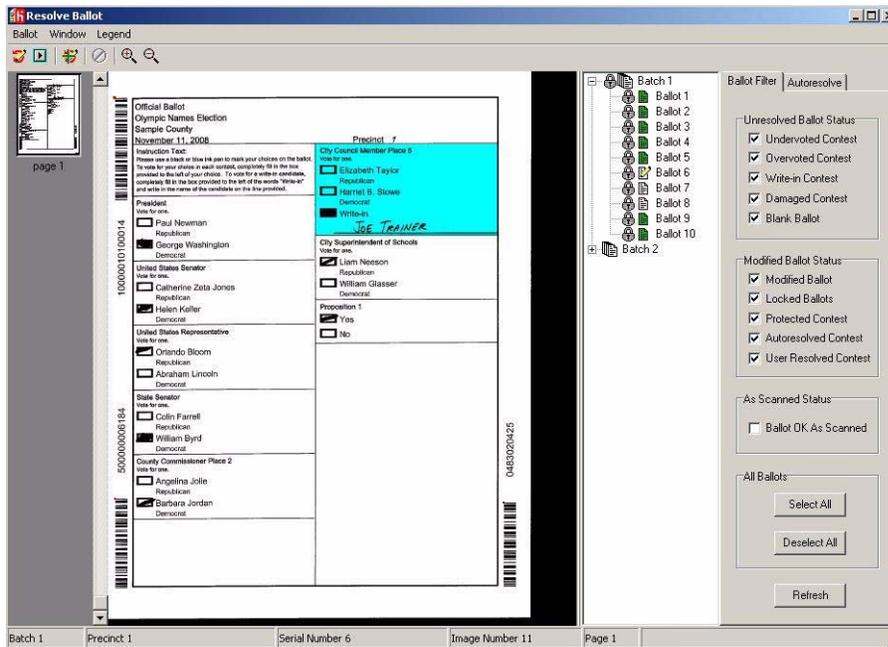
In this example, the damaged contest has been confirmed and will be recorded as an undervote.

15.7 If you have not enabled one-click resolution, click the **Save** and **Next Contest** tools (or save and close the **Contest** window).



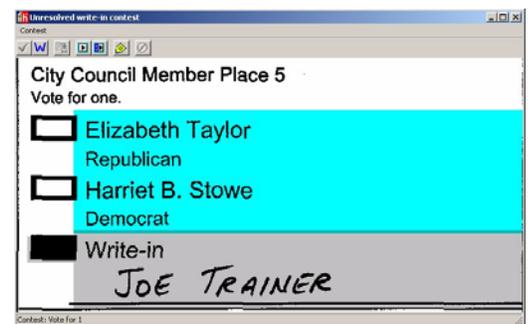
16. If applicable, resolve write-in votes.

- 16.1 If not already accomplished, left-click to select the target batch. Right-click the target batch in the selection tree and choose **Check Out**.
- 16.2 Select the ballot images in the tree, stopping at those requiring resolution.



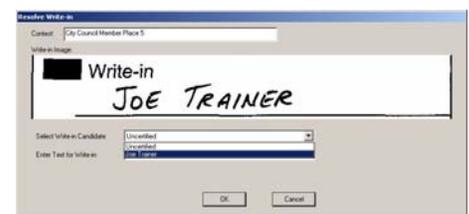
16.3 To resolve a write-in contest, double-click an aqua contest.

16.4 Click  OR double-click in the gray write-in area to open the **Resolve Write-in** window.



16.5 In the **Resolve Write-in** window, click and hold the drop-down arrow and select a certified write-in candidate name, or enter the candidate name in the **Enter Text for Write-in** field (if free form write-ins are allowed), or assign as "Uncertified".

16.6 In the **Resolve Write-in** window, click **OK**.



16.7 If you have not enabled one-click resolution, click the **Save and Next Contest** tools  (or save and close the **Contest** window).

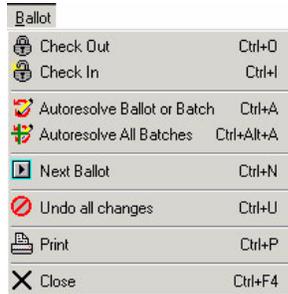
The write-in vote is saved as a mark for the candidate chosen, as indicated in the overlay.



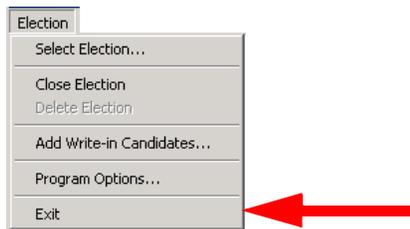
17. When finished resolving batches, **Ctrl**-click to select resolved batches in the selection tree, and then right-click and choose **Check In**.



18. Close the **Resolve Ballot** window by going to the **Ballot** menu and clicking **Close**, or by clicking the window's close icon.



19. Exit Ballot Now by going to the **Election** menu and clicking **Exit**, or by clicking the window's close icon. Do not exit Ballot Now on a server unless resolution at client stations is completed. In a client-server setup, exit the client(s) first, then the server.



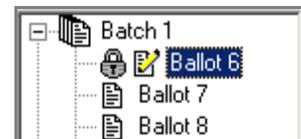
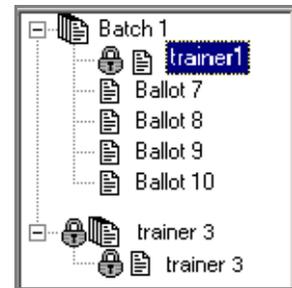
**Note:**

In client-server setups, a ballot currently being resolved by another user is so noted in the selection tree. These ballots are marked by the “checked out” (locked) icon and the User ID. **Refresh** to check for ballots in use by other resolution board members.

A batch and/or ballot checked out by another user is so noted in the selection tree (even in stand-alone Ballot Now installations). These ballots are marked by the “checked out” icon and the User ID. Ballots checked out by another user may be checked in either by that user, or by a user with Administrator-level permissions.

The ballot currently being viewed on the PC is noted in the selection tree by a pencil icon.

A batch that has been saved to MBB is noted in the selection tree by a green padlock icon and green ballot icon(s).



**Tip(s):**

When manually resolving contests, view the entire ballot in the **Resolve Ballot** window. Double-click only those contests that require manual resolution, closing each **Contest** window and viewing the entire ballot for other contests with voter intent issues. For all other issues on the ballot, set the AutoResolve filter to the desired settings (set to AutoResolve overvotes and undervotes for increased efficiency), and AutoResolve the remainder of the ballot by clicking the **AutoResolve** tool.

To AutoResolve, a user may select a ballot or batch in the selection tree, and then right-click the **AutoResolve** tool. AutoResolve will resolve as indicated on the AutoResolve filter tab.



In the **Resolve Ballot** window, this icon is the **Next Ballot in batch** tool. Click it to go to the next ballot in the current batch. In the **Resolved Contest** window, this icon is the **Next Contest** tool. Click it to go to the next contest in the ballot.

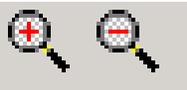


To AutoResolve all scanned batches, click the **AutoResolve All** tool.



Use the **Undo** tool from the **Resolve Ballot** window to undo all actions performed on a ballot or batch selected in the selection tree.

Use the **Undo** tool from the **Contest** window to undo all actions performed on a contest.



Use the **Zoom** tools to zoom in or out of a ballot view in the **Resolve Ballot** window.



In the **Resolve Ballot** window, click and drag on the ballot image to zoom in on a rectangular section of the ballot. Click the **Zoom Out** tool, or right-double-click, to return to the fit-to-window view.



Click the **Confirm Contest as shown** tool to mark a contest as overvoted or undervoted without specifying voter intent.



Click **Save** to save changes made in the **Unresolved Contest** window.



In the **Resolved write-in contest** window, click the **Show Resolve Write-in Window** tool to access write-in resolution features.



Click the **Next Ballot** tool in the **Resolved Contest** window to view the next ballot that contains an unresolved contest.



Protect contests from AutoResolve with the **Protect** tool, available in the **Contest** menu and on the associated tool bar. Engaging AutoResolve will not affect these contests. Deselect the **Protect** tool either before or after manually resolving the contest.



Leave locked (checked out) ballots or batches locked when exiting Ballot Now, in order to prevent other non-Administrator-level users from resolving these (e.g., in order to discuss voter intent issues with a team member at a later time).



When you right-click and hold in the selection tree, you can **Check Out**, **Check In**, **AutoResolve** the selected batch or ballot, and **Print** the selected ballot.



Go to the **Ballot** menu and click **Print**, or right-click in the selection tree and choose **Print**, in order to print a hard copy of the selected ballot. Ballots printed in this manner have all bar codes blacked out, and these ballots will not scan.

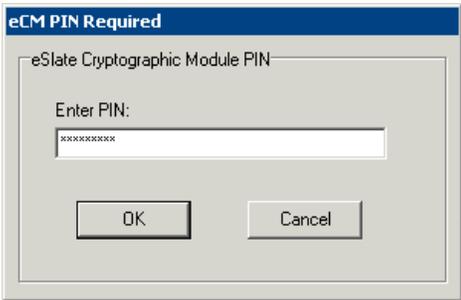
**Notes:**

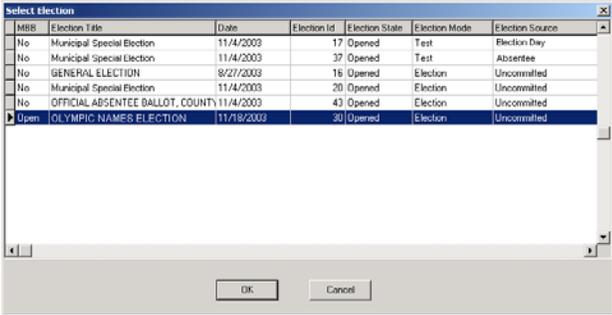
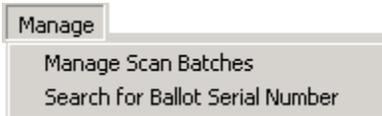
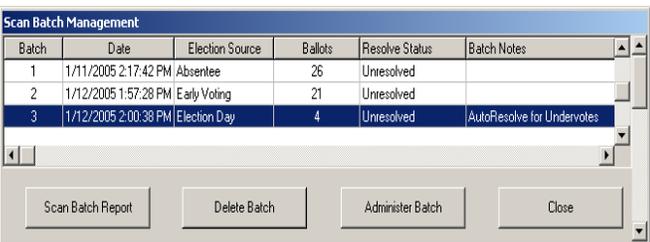
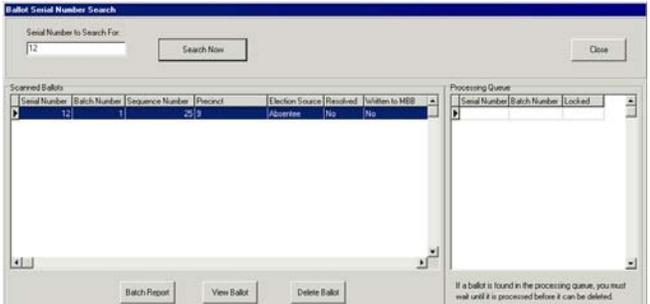
**Notes:**

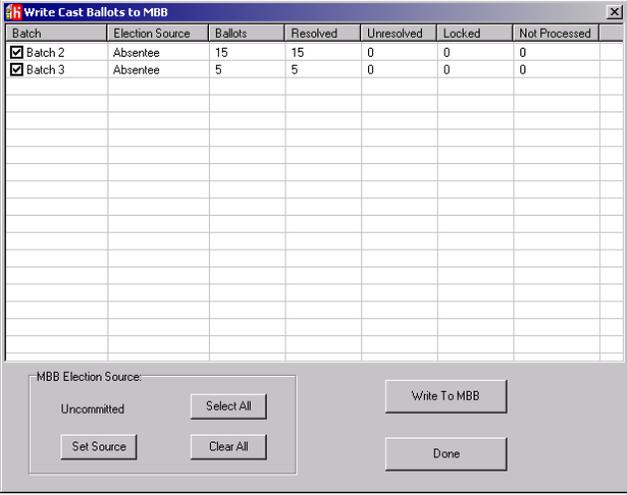
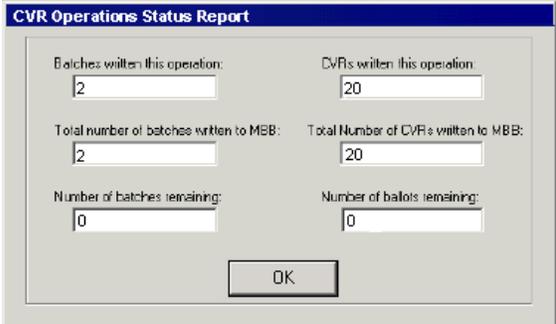
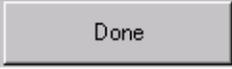


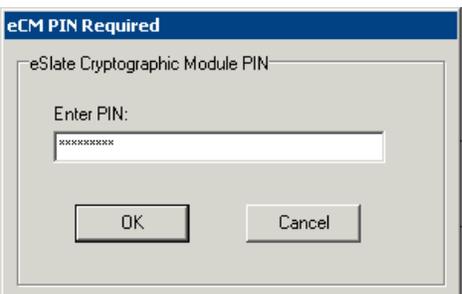
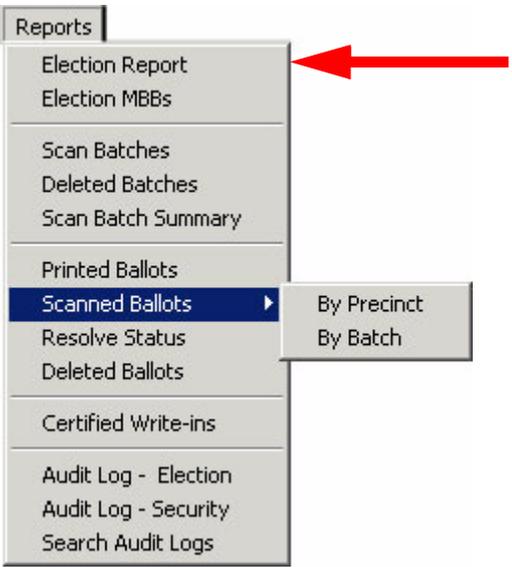
# Chapter 6

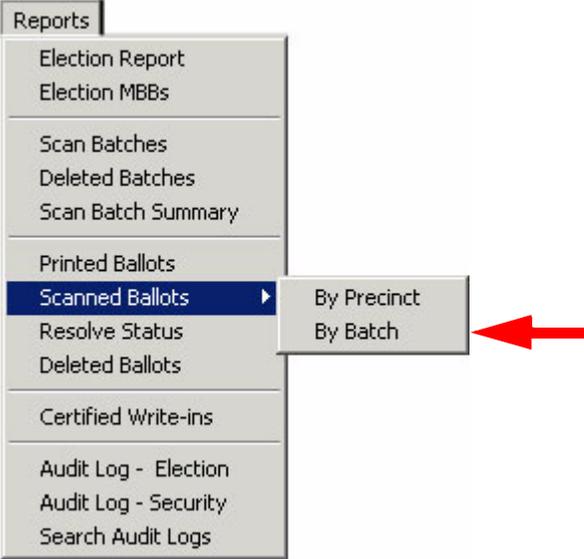
## Writing CVRs and Preparing for Tabulation

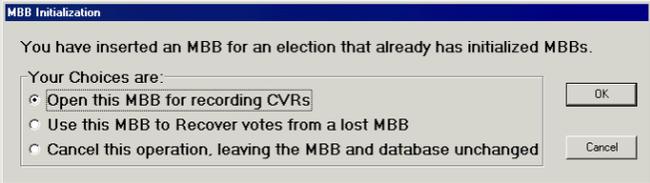
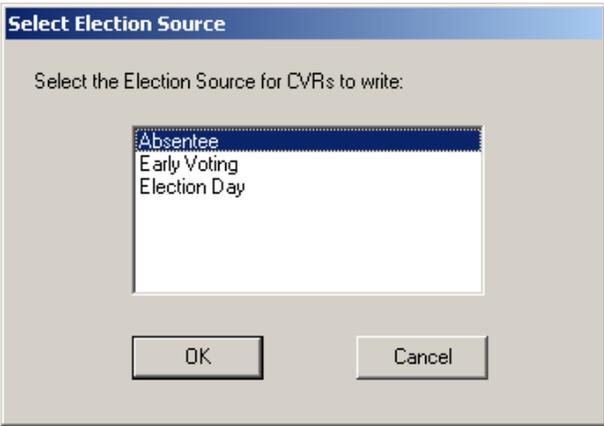
Steps:	Details:
<p>1. Open Ballot Now and log in as a user with Administrator permissions.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Double-click the Ballot Now shortcut on the desktop or go to <b>Start/Programs/Hart InterCivic/Ballot Now</b>.</li> <li><input type="checkbox"/> If using a client-server Ballot Now setup, log into the server.</li> </ul> <p><b>Note:</b> Cast Vote Records (CVRs) cannot be written to card from client PCs.</p>
<p>2. Insert the eCM into a USB port.</p> 	<p>USB ports are identified with this symbol:</p> 
<p>3. Insert the MBB designated for Ballot Now into the card reader, and then go to the <b>Election</b> menu and click <b>Select Election</b>.</p> 	
<p>4. When prompted, enter the eCM PIN and click <b>OK</b>.</p> 	

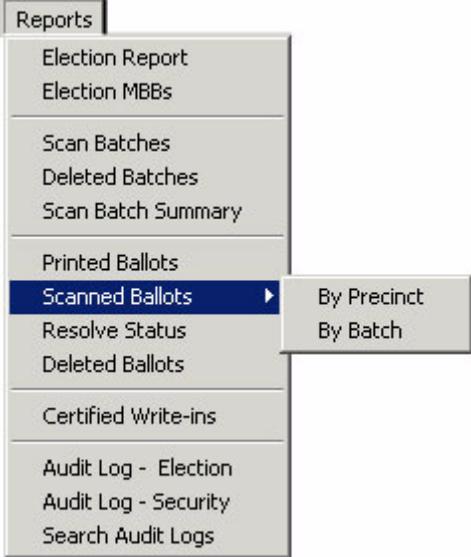
Steps:	Details:
<p>5. In the <b>Select Election</b> window, highlight the target election and click <b>OK</b>.</p> 	
<p>6. (Optional) Print a "Zero Report".</p> 	<p>Go to the <b>Reports</b> menu and click <b>Election Report</b>.</p> <p><b>Note:</b> Some jurisdictions request a "Zero Report" for Ballot Now at intervals to show that there are no CVRs already saved in the system. The "Election Report", printed before saving resolved batches to card, reflects this.</p>
<p>7. Perform any necessary scan batch or ballot management.</p>   	<ul style="list-style-type: none"> <li><input type="checkbox"/> Go to the <b>Manage</b> menu and click <b>Manage Scan Batches</b> in order to:             <ul style="list-style-type: none"> <li>• Retrieve "Scan Batch Reports", as needed</li> <li>• Delete scanned batches (i.e., ballot images), as needed</li> <li>• Update notes field in "Scan Batch Reports", as needed (<b>Administer Batch</b>)</li> <li>• Change election source for scanned batches, as needed (<b>Administer Batch</b>)</li> </ul> </li> <li><input type="checkbox"/> Go to the <b>Manage</b> menu and click <b>Search for Ballot Serial Number</b> in order to:             <ul style="list-style-type: none"> <li>• Enter a ballot's serial number to search for, as needed</li> <li>• View a ballot's "Scan Batch Report", as needed</li> <li>• View a ballot image, as needed</li> <li>• Print a ballot image, as needed                 <ul style="list-style-type: none"> <li>&gt; Highlight the target ballot, click <b>View Ballot</b>, and print.</li> </ul> </li> <li>• Delete a ballot image, as needed</li> </ul> </li> </ul> <p><b>See:</b> "Managing Ballot Now Scanned Batches and Ballots" on page 22.</p>

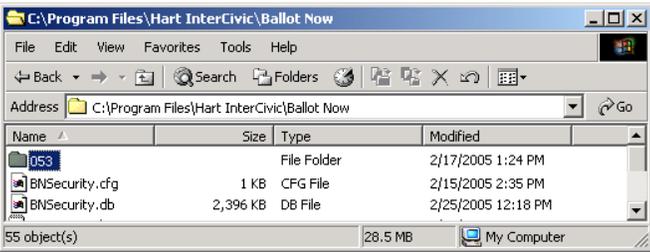
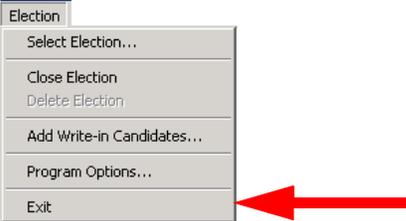
Steps:	Details:
<p>8. Write Cast Vote Records (CVRs) to MBB from the <b>Write Cast Ballots to MBB</b> window.</p>   <p style="text-align: center;"></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Go to the <b>Write CVRs</b> menu and click <b>Write Cast Ballots to MBB</b>. <ul style="list-style-type: none"> <li>• Click <b>Set Source</b> and identify the MBB source.</li> </ul> </li> <li> Once the MBB source is designated and batches are written to that MBB, you cannot undo that MBB source designation.</li> <li>• Click <b>Select All</b> or select the checkbox(es) for the target batch(es).</li> <li>• Click <b>Write to MBB</b>.</li> <li>• Click <b>OK</b> in the <b>CVR Status Report</b> window.</li> <li>• Click <b>Done</b> in the <b>Write Cast Ballots to MBB</b> window.</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> The batch and MBB “Election Source” identification must match.</li> <li><input type="checkbox"/> CVRs for a batch will only be written to the MBB if no ballots in that batch are unresolved locked, or not processed.</li> <li><input type="checkbox"/> No CVRs will write to the MBB if any batch consists of zero ballots. Delete these batches.</li> <li><input type="checkbox"/> Once a batch is written to an MBB, that batch cannot be deleted.</li> <li><input type="checkbox"/> At least 65,000 CVRs can be written to a 128 Megabyte MBB.</li> </ul>

Steps:	Details:
<p>9. Make certain that an eCM is installed and close the MBB.</p>   	<ul style="list-style-type: none"> <li><input type="checkbox"/> Go to the <b>Admin</b> menu, click <b>Close MBB</b>, and click <b>OK</b> in the confirm dialog box that appears.</li> <li><input type="checkbox"/> Subsequent MBBs (e.g., late mail) can be initialized in Ballot Now as long as the Ballot Now election is in an “Open” state.</li> </ul> <p><b>Note:</b> It is not <i>required</i> to close an MBB before going to Tally; however, an open MBB is available for recording additional CVRs in Ballot Now, and closing the MBB before going to Tally can prevent accidental re-use in Ballot Now.</p> <p> As a rule, an MBB should <i>NOT</i> be taken back to Ballot Now after reading CVRs from that MBB into Tally.</p> <p><b>See:</b> “Ballot Now MBB Management” on page 16.</p>
<p>10. Print the “Election Report” and “Election MBBs” report.</p> 	<p>Go to the <b>Reports</b> menu and click <b>Election Report</b>, and then go to the <b>Reports</b> menu and click <b>Election MBBs</b>.</p> <p><b>Tip(s):</b> At a minimum, the “Scanned Ballots by Batch” and “Election Report” reports should accompany Ballot Now MBBs to the Counting Station.</p> <p>Retain reports for official records.</p> <p>If using multiple Ballot Now systems, it is useful to color-code each system and the corresponding report paper for each system.</p> <p>If exporting reports in .pdf format, check <b>Preferences</b> in Acrobat Distiller.</p>

<b>Steps:</b>	<b>Details:</b>
<p>11. Print a "Scanned Ballots by Batch" report.</p> 	<p>Go to the <b>Reports</b> menu and click <b>Scanned Ballots By Batch</b>.</p>
<p>12. Exit Ballot Now.</p> 	<p>Go to the <b>Election</b> menu and click <b>Exit</b>.</p>
<p>13. Send the Ballot Now MBB(s) and the reports to the counting station (Tally).</p> 	<p>Or send to secure storage until such time as election code allows Tally processing.</p>

<b>Steps:</b>	<b>Details:</b>
<p>14. In order to record CVRs on another MBB after the first has been taken to Tally, insert a blank Election MBB, log in to Ballot Now, and follow prompts. When the <b>MBB Initialization</b> message displays, select <b>Open this MBB for Recording CVRs</b>, click <b>OK</b>, and continue.</p>  <p>The screenshot shows a dialog box titled "MBB Initialization". The text inside says: "You have inserted an MBB for an election that already has initialized MBBs." Below this, it asks for "Your Choices are:" and provides three radio button options: "Open this MBB for recording CVRs" (which is selected), "Use this MBB to Recover votes from a lost MBB", and "Cancel this operation, leaving the MBB and database unchanged". There are "OK" and "Cancel" buttons.</p>	<p><input type="checkbox"/> Incremental MBBs are MBBs that record only a portion of the scanned batches associated with a given election.</p> <ul style="list-style-type: none"> <li>For example, in absentee voting, late mail might be written to a separate, incremental, MBB.</li> </ul> <p><input type="checkbox"/> The eCM must be installed in order to open an MBB for recording CVRs.</p>  <p>The image shows a blue, handheld USB device with a USB-A connector on one end and a circular opening on the other, likely the eSlate Cryptographic Module (eCM).</p> <p><b>See:</b> "Ballot Now Tasks Requiring the eSlate Cryptographic Module (eCM)" on page 10.</p>
<p>15. If using incremental MBBs for the <i>same</i> election source (Early Voting, Absentee, or Election Day), repeat steps to scan, resolve, and write ballots/CVRs for those MBBs.</p>  <p>The image shows a rectangular MBB with a white label. The label features the "HART InterCivic" logo and several lines of small text: "DO NOT DROP, BEND OR CRUSH", "KEEP AWAY FROM MOISTURE", "KEEP CONNECTION CLEAN", "AVOID HIGH TEMPERATURES AND DIRECT SUNLIGHT". It also includes "U.S. Patent # 6,216,988 B1" and "CUMMINS 1st Article".</p>	
<p>16. If using incremental MBBs for a <i>separate</i> election source (Early Voting, Absentee, or Election Day), repeat steps to scan, resolve, and write ballots/CVRs for those MBBs, <i>making certain to identify the batch source before scanning the first batch.</i></p>  <p>The screenshot shows a dialog box titled "Select Election Source". The text inside says: "Select the Election Source for CVRs to write:". Below this is a list box containing three options: "Absentee", "Early Voting", and "Election Day". The "Absentee" option is currently selected. There are "OK" and "Cancel" buttons at the bottom.</p>	<p><b>Note:</b> The batch source setting is persistent. Batch source designation remains at the selected setting for all batches in that election database until you manually change the source identification option.</p> <p>Batch and MBB "Election Source" identification must match.</p>

<b>Steps:</b>	<b>Details:</b>
<p>17. Make certain that an eCM is installed and close any remaining MBBs.</p> 	<p>Go to the <b>Admin</b> menu, click <b>Close MBB</b>, and click <b>OK</b> in the confirm dialog box that appears.</p>
<p>18. Send the remaining Ballot Now MBB(s) and the reports to the counting station (Tally).</p> 	<p>Or send to secure storage until such time as election code allows Tally processing.</p>
<p>19. Print Ballot Now reports.</p> 	

<b>Steps:</b>	<b>Details:</b>
<p>20. Back up the Ballot Now database to CD.</p>  	<ul style="list-style-type: none"> <li><input type="checkbox"/> The file path to the Ballot Now database is: C:\Program Files\Hart InterCivic\Ballot Now\### (three-digit Election I.D.)</li> <li><input type="checkbox"/> Also back up the BNsecurity.db and BNsecurity.cfg files</li> <li><input type="checkbox"/> CD burner software will vary. Follow prompts to burn a CD or consult online help.</li> </ul> <p><b>See:</b> “Appendix D: Backing Up Election Databases” on page 123.</p>
<p>21. Close the election in Ballot Now.</p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Go to the <b>Election</b> menu and click <b>Close Election</b>.</li> <li><input type="checkbox"/> Click <b>Yes</b> in the confirm dialog box that appears.             <ul style="list-style-type: none"> <li>• Do not close if using any other MBBs with this Ballot Now database.</li> </ul> </li> <li><input type="checkbox"/> Delete elections that were brought into Ballot Now for proofing or practice purposes. Go to the <b>Election</b> menu and click <b>Delete Election</b>.             <ul style="list-style-type: none"> <li>• An election must be closed before that election can be deleted.</li> </ul> </li> </ul>
<p>22. Remove the eCM.</p> 	<p>Store the eCM in a secure location separate from the MBBs.</p>
<p>23. Exit Ballot Now.</p> 	<p>Go to the <b>Election</b> menu and click <b>Exit</b>.</p>

**Notes:**

**Notes:**

## Appendix A: Glossary

<b>Term:</b>	<b>Definition:</b>
<b>Abandoned Ballot</b>	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.
<b>Absentee Ballot</b>	An official ballot issued to a voter who will be "absent" from the polling place on Election Day.
<b>Absentee Voting</b>	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."
<b>Access Code</b>	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.
<b>Access Code Status Report</b>	A JBC report that is printed on-demand. It lists the number of Access Codes issued, voted, expired, canceled, and active.
<b>Access Code Summary</b>	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.
<b>Americans with Disabilities Act (ADA)</b>	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.
<b>ATA</b>	Advanced Technology Attachment; a disk drive implementation that integrates the controller on the disk drive itself.
<b>Audio Card</b>	Used in a DAU eSlate, the PC card that contains the audio prompt recordings for an election. Formerly also called a "DAU Card".
<b>Audit Log, Audit Trail, Audit Report</b>	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.
<b>Authentication</b>	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.
<b>Ballot Box, eScan</b>	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.

<b>Term:</b>	<b>Definition:</b>
<b>Ballot Box Security Seal</b>	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.
<b>Ballot Code</b>	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.
<b>Ballot Format</b>	The arrangement of the ballot created in BOSS. Ballots may be formatted for the eSlate or for Ballot Now.
<b>Ballot Instructions</b>	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.
<b>Ballot Key</b>	The unique alphanumeric identifier associated with each VBO cast vote record. This identifier aids in reconciling votes in case of a manual recount.
<b>Ballot Now™</b>	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.
<b>Ballot Now Image Processor</b>	Ballot Now Image Processor (BNIP) is an application that runs in parallel with Ballot Now. After scanning ballots, BNIP processes ballot images.
<b>Ballot Origination Software System™ (BOSS)</b>	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.
<b>Ballot Style</b>	<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>
<b>Ballot Text</b>	Instructional text embedded in the ballot. Ballot Text is often used to identify a section of the ballot.
<b>Bar Code</b>	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.
<b>Card Device</b>	The PC-card drive for reading and writing Hart Voting System data and audio cards.
<b>Cast Vote Record (CVR)</b>	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.

<b>Term:</b>	<b>Definition:</b>
<b>Challenged Ballot</b>	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.
<b>Contest</b>	A choice to be made on the ballot; a race. Contest types include offices, issues, referendums, propositions and questions.
<b>Credentials</b>	Authentication information that enables access to operations in the system or associated databases. Credentials typically include user IDs and passwords.
<b>Cumulative (Access Code) Summary</b>	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.
<b>Cumulative Voting</b>	The votes for each candidate in an office contest are replicated as many times as the number of valid choices.
<b>Cyclic Redundancy Check</b>	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.
<b>(Daily) Detail Report</b>	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.
<b>Daily (Access Code) Summary</b>	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.
<b>Daisy Chain</b>	Items connected in a series. The eSlates are daisy chained, one to another, with one plugging into the JBC.
<b>Damaged Contest</b>	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.
<b>Database</b>	A storage point for information (data).
<b>Demo Card</b>	An ATA memory card that contains both ballot and audio data for use in a Demonstration eSlate.
<b>Demonstration eSlate (Demo)</b>	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.”
<b>Digital Signature</b>	An encrypted digital code appended to data, making it possible to require authentication before allowing access to that data.
<b>Direct Record Electronic (DRE)</b>	The election industry term for an electronic machine at which a voter can view, vote, and cast a ballot.

<b>Term:</b>	<b>Definition:</b>
<b>Disabled Access Unit™ (DAU)</b>	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.
<b>District</b>	A selection of precincts and/or split precincts that determine a voting group.
<b>Duplicate Ballot</b>	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.
<b>Duplex</b>	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.
<b>Early Voting</b>	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).
<b>Early Voting Retrievable Ballot</b>	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.
<b>eCM</b>	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.
<b>eCM Manager</b>	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).
<b>eCM PIN</b>	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.
<b>EDX</b>	Election Definition XML (eXtensible markup language); a format for election information data exchange.
<b>Election Assistance Commission (EAC)</b>	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.
<b>Election ID</b>	An election identification code that is unique for every election. The election ID is used internally by the software applications.

<b>Term:</b>	<b>Definition:</b>
<b>Election Identification Report</b>	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.
<b>Election Management System (EMS)</b>	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.
<b>Encryption</b>	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.
<b>eScan™</b>	Hart InterCivic's precinct paper ballot scanning device. A paper ballot printed from Ballot Now can be scanned and recorded on this device.
<b>eSlate®</b>	Hart InterCivic's direct record electronic (DRE) voting device. An electronic ballot can be viewed, voted, and recorded on this device.
<b>Event</b>	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.
<b>FEC</b>	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).
<b>Finalized</b>	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.
<b>FireWire</b>	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.
<b>Firmware</b>	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.
<b>Flash Memory</b>	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.
<b>Fractional Cumulative Voting</b>	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.
<b>Functionality Test</b>	Testing of hardware functionality (e.g., testing to see that an eSlate button responds when pressed).

<b>Term:</b>	<b>Definition:</b>
<b>Fusion™</b>	A supplemental Hart Voting System software application used to integrate data, as from Tally and another voting system, and/or to provide custom reporting.
<b>Hart Voting System</b>	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.'
<b>Hash</b>	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.
<b>HAVA</b>	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."
<b>Incomplete Ballot</b>	A multi-sheet ballot being scanned in a scan batch that has its first sheet, but is missing following sheets.
<b>Infusion™</b>	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.
<b>Initialized Report</b>	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.
<b>Judge's Booth Controller™ (JBC)</b>	The control unit of the eSlate system, through which a poll worker distributes electronic ballots to the eSlate and DAU eSlate.
<b>Jurisdiction</b>	A precinct or group of precincts managed by a single organization.
<b>Key GUID</b>	Key Globally Unique Identifier. A unique, system-generated value assigned to each signing key in the eCM Manager.
<b>Key ID</b>	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.
<b>Locked Ballot</b>	In Ballot Now, a ballot that is currently checked out in the resolve process for editing by a user.
<b>Logic and Accuracy Test (L &amp; A or LAT)</b>	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.

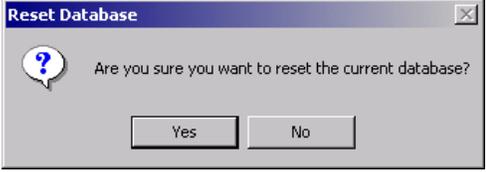
<b>Term:</b>	<b>Definition:</b>
<b>MBB, Election</b>	An MBB used to collect votes for an election. The Election MBB can only contain information from Election ballots.
<b>MBB, Test</b>	An MBB used for test purposes when validating the eSlate system before an election. The Test MBB can only contain information from Test ballots.
<b>Mobile Ballot Box™ (MBB)</b>	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.
<b>Network Configuration Report</b>	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.
<b>Non-partisan Office</b>	An elected office for which candidates run independent of political party affiliation.
<b>Orphan Ballot</b>	A multi-sheet ballot being scanned in a scan batch that has missing leading sheets.
<b>Overvote</b>	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.
<b>Party</b>	A political party, for example Democratic or Republican.
<b>PC Card</b>	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.
<b>Persistence</b>	A property of a programming language where created objects and variables continue to exist and retain their values between runs of the program.
<b>Polling Place</b>	The area within the polling location where voters cast ballots. Often a single polling place supports several precincts.
<b>Polls Closed Report</b>	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.
<b>Polls Open Report</b>	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.
<b>Poll Worker Button</b>	A button, located on the back panel of the eScan device, used to access poll worker and administrator functions.
<b>Precinct</b>	A jurisdiction subdivision for election purposes.
<b>Precinct Voting System (PVS)</b>	A legacy term for those components of the Hart Voting System that are used for election activities at individual polling places.
<b>Provisional Ballot</b>	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.

<b>Term:</b>	<b>Definition:</b>
<b>Provisional Ballot Stub</b>	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.
<b>Provisional Parsing</b>	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.
<b>Provisional Voter</b>	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.
<b>PUB (Public) Count</b>	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.
<b>PVT (Private) Count</b>	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.
<b>Rally™</b>	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.
<b>Replacement Ballot</b>	A ballot that is designated by the election authority to be a replacement for a spoiled ballot.
<b>Resolution</b>	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.
<b>Sample Ballot</b>	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.
<b>Scan Batch</b>	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 <b>Scan Ballots</b> window prior to scanning the batch of ballots.

<b>Term:</b>	<b>Definition:</b>
<b>Select Wheel</b>	The rotary wheel on the eSlate and DAU eSlate that allows a voter to navigate the ballot and highlight choices by turning the wheel.
<b>Serial Number</b>	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.
<b>SERVO™</b>	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.
<b>Sheet</b>	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.
<b>Signing Key</b>	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.
<b>Sip-and-Puff</b>	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.
<b>Split Precinct</b>	The smallest division of a precinct for election purposes.
<b>Spoiled Ballot</b>	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.
<b>SSL</b>	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.
<b>Straight Party Voting</b>	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.
<b>Suspend Report</b>	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.
<b>Tactile Input Switches</b>	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.
<b>Tally™</b>	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.

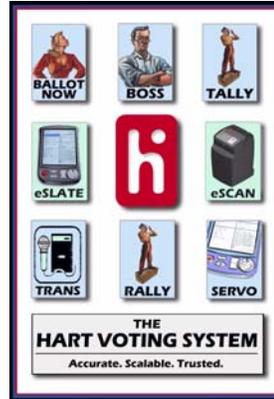
<b>Term:</b>	<b>Definition:</b>
<b>Tally Report Tape</b>	An Election Day report that may be printed on a JBC or eScan after polls are closed. It includes the date, time, precinct, a tally of votes for each contest, and an Access Code or ballot summary. BOSS includes a setting for allowing, or disallowing, this report to be printed from the JBC or eScan after close of polls on Election Day.
<b>TRANS</b>	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.
<b>Undervote</b>	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.
<b>UPS</b>	Uninterruptible Power Supply.
<b>USB</b>	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.
<b>VBO</b>	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.
<b>Voter Registration Computer</b>	An electronic poll book sometimes known as a “thin client” or “VR Computer.”
<b>VVPAT</b>	Voter-Verified Paper Audit Trail; Implemented in the Hart Voting System by the VBO (Verifiable Ballot Option) device.
<b>WAV file</b>	A file format (.wav) used for storing digital audio. TRANS audio is stored in .wav file format.
<b>Write-in</b>	A name of a candidate entered by the voter in order to vote for a candidate that is not listed on the ballot.
<b>Write-in, certified</b>	A candidate that has been certified by the election authority as being a valid write-in candidate for the election.
<b>Write-in Voting</b>	A means to cast a vote for an individual not listed on the ballot.
<b>XLIFF</b>	XML Localization Interchange File Format. A file type (.xlf) used by BOSS and TRANS for language text translation.
<b>XML</b>	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.
<b>Zero Tape Report</b>	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: Information, Confirmation, Error, and Warning Messages

<i>Type of Message:</i>	<i>Explanation:</i>	<i>Example:</i>
<p><b>Information</b></p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Informs about an operation</li> <li><input type="checkbox"/> Includes an information icon</li> <li><input type="checkbox"/> Includes an <b>OK</b> button</li> </ul>	
<p><b>Confirmation</b></p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Asks user to confirm an action, particularly when the action cannot be reversed</li> <li><input type="checkbox"/> May include text from the command performed</li> <li><input type="checkbox"/> Includes a question mark icon</li> <li><input type="checkbox"/> User responds with <b>Yes</b> or <b>No</b></li> </ul>	
<p><b>Error</b></p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> First statement in error identifies the problem</li> <li><input type="checkbox"/> Second statement may inform user of required action</li> <li><input type="checkbox"/> Includes an error icon</li> <li><input type="checkbox"/> Includes an <b>OK</b> button</li> </ul>	
<p><b>Warning</b></p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Appears when the user must double-check a command</li> <li><input type="checkbox"/> May include text from the command performed</li> <li><input type="checkbox"/> Includes a warning icon</li> <li><input type="checkbox"/> Includes an <b>OK</b> button</li> </ul>	

**Notes:**

## Appendix C: Hart Voting System Software User Tips



The following apply to ALL Hart Voting System programs.

### **Software Password, Certificate, and PIN Tips**

#### *Best Practices*

- Do not give out an administrator password, applicable either to the PC where the Hart Voting System software is housed, or to a Hart Voting System application itself.
- Change every user ID, password, certificate, eCM key ID, signing key, and PIN(s) during PC acceptance and at regular intervals and in accordance with federal, state, and local guidelines.
- The user currently logged in should stay at the computer while running the application and exit the application if s/he steps away from the PC.

#### *Avoid Using*

- Any password you have used before
- Any string of three characters repeated or reversed
- Any character repeated more than twice
- Your name or your initials
- The computer or application user ID
- The names of relatives, birthdays, phone numbers or the company name
- The number for this year, last year or next year, or the three-character abbreviations for the months
- Telephone number or car license plate numbers

#### *Do Use*

- A combination of upper and lowercase letters
- A password that is at least 6 - 12 characters long
- A new password for every user at regularly scheduled intervals (e.g., annually or quarterly)
- Random characters users will remember

#### *Tips for a Secure Password, Certificate, or PIN*

- Use the first letters of the words in a memorable phrase.
- Use a meaningless but easy-to-remember phrase.
- Insert numbers into the phrase.
- Note the password, certificate information, and/or eCM PIN, in a private and secure location.

### **Computer Security**

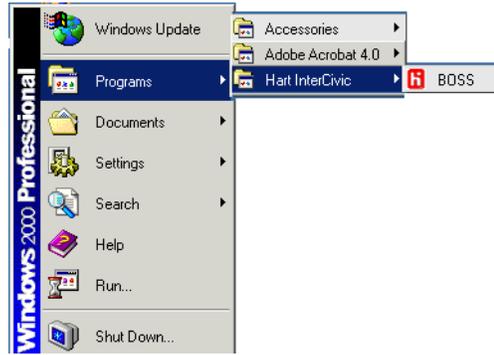
Computers running Hart InterCivic software should be kept in locked spaces with limited access. Password-protected screen savers or other similar security measures should be applied.

## Software Features:

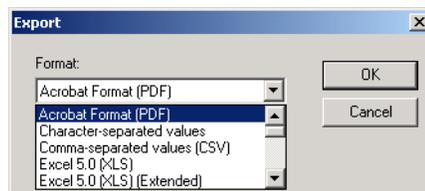
- ❑ Whichever button is shadowed/dotted inside a window is the button selected for activation with the keyboard Enter key.
- ❑ Whichever character on a menu or button is underlined indicates that the function may be activated with the Alt key and that character.



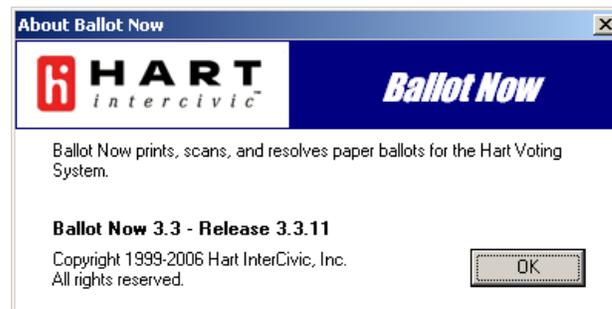
- ❑ In a menu, an arrow facing to the right opens a pop-up menu offering more choices.



- ❑ In a dialog box, the arrow facing down opens a list box, offering more choices.



- ❑ Per application, to view the version release number (N.N.N), go to the **Help** menu and click **About**.



**The following tips apply to specific software programs:**

- ❑ BOSS, Ballot Now, Tally, and SERVO: To highlight/select a list of items (e.g., precincts) that are consecutive, use Shift + Click.
  1. Click the first item once.
  2. Hold down on Shift.
  3. Click the last item once.
  4. Release Shift.
  
- ❑ BOSS, Ballot Now, Tally, and SERVO: To highlight/select a list of items (e.g., precincts) that are NOT all consecutive, use Ctrl + Click.
  1. Click the first item.
  2. Hold Ctrl.
  3. Continue to click items, holding Ctrl, until you have selected all targeted items.
  4. Release Ctrl.
  
- ❑ Ballot Now stand-alone and server PCs: Do NOT install the scanner driver on a Ballot Now PC. If the scanner install wizard appears on PC startup, cancel the scanner driver install process. Ballot Now scanner drivers are embedded in the Ballot Now application.

**Notes:**

## Appendix D: Backing Up Election Databases

### What Data to Back Up

The following database folders should be backed up to CD<sup>1</sup>:

- eCM Manager; \*.eCM file created with the **Save File** function
- BOSS; Numbered folder with BossData.db and BossData.cfg files
- Ballot Now Test; Numbered folder with the election I.D. followed by a “T” (e.g., 023T), in addition to the BNsecurity.db and BNsecurity.cfg files in the “Ballot Now” folder
- Ballot Now Election; Numbered folder with the election I.D. (e.g., 023), in addition to the BNsecurity.db and BNsecurity.cfg files in the “Ballot Now” folder
- Rally; “Database” folder with the Mbbtrans.db and Mbbtrans.cfg files
- Tally Test; Numbered folder with the TallyData.db and TallyData.cfg files
- Tally Election; Numbered folder with the TallyData.db and TallyData.cfg files
- SERVO; “Database” folder with the ServoData.db and ServoData.cfg files.

*Locations of Election Database Folders for Backup:*

- eCM Manager; after clicking **Save File**, use standard Windows navigation to navigate to a folder named for the election and to name the .eCM file.
- BOSS; C:\boss\Database\YearMonthDay-HourMinuteSecond (12 digits)
- Ballot Now; C:\Program Files\Hart Intercivic\Ballot Now\### (three-digit Election I.D.)
  - C:\Program Files\Hart Intercivic\Ballot Now\BNsecurity.db
  - C:\Program Files\Hart Intercivic\Ballot Now\BNsecurity.cfg
- Rally; C:\Program Files\Hart InterCivic\Rally\Database
- Tally; C:\Program Files\Hart InterCivic\Tally\Database\YearMonthDay-HourMinuteSecond (12 digits)
- SERVO; C:\Program Files\Hart InterCivic\SERVO\Database

*Naming conventions for folders and CD files:*

- Name each application’s backup folder with the application, election, type of election, and date of election. (Example: BOSSgeneral\_11.02.04)
- Name the CD within the character limits for the CD creator application. The jurisdiction, election, and election date should be included. (Example: Smith\_gen11.2.04)

### How and When to Back Up Data

BOSS, Tally, and Rally include backup or archive functions within the user interface. An administrator-level user may use this function to back up the database and configuration files to a user-defined directory on the PC. Database and configuration files should always be saved to folders named for the election, the time and date, and the status of the database.

All application databases can be backed up by saving the folders indicated in the “Locations of Election Databases” section to a user-defined directory on the PC and/or directly to CD. These folders should always be saved to a directory (folder) named for the election, the time and date, and the status of the database.

---

1. If a database is too large for backup to CD, another medium will be required.

- Back up the .eCM file:
  - Immediately after creating eCMs for the election.
- Back up the numbered BOSS database folder (or use the **Archive** function in BOSS):
  - Immediately before exporting text for translation
  - After importing translated text and audio
  - After completing all proofreading and before generating the ballot
  - After generating the ballot and writing media, but before finalizing the database
  - After finalizing the database.
- Back up the numbered Ballot Now database folder and BNsecurity.db and BNsecurity.cfg files:
  - After closing the election in Ballot Now, at minimum.
- Back up the numbered Tally database folder (or use the **Backup** function in Tally):
  - After each instance of creating printed and exported reports for public use (e.g., media outlets)
  - After processing absentee by-mail MBBs on Election Day
  - After processing Early Voting MBBs
  - After each instance of creating printed and exported reports for public use (e.g., media outlets) on Election Day
  - After processing absentee by-mail late mail MBBs after Election Day
  - Before resolving write-in votes
  - Before resolving provisional ballots
  - Before finalizing
  - After finalizing
  - Immediately after Canvassing.
- Back up each Rally station “Database” folder (or use the **Archive** function in Rally):
  - After processing all MBBs and printing and exporting final reports and before resetting the Rally database (including before resetting the Rally database as an emergency procedure).
- Back up the SERVO “Database” folder:
  - After inventorying equipment with SERVO pre-election
  - After backing up equipment post-election
  - On the “master” SERVO PC after combining events into one “master” event for an election, if applicable.

## **Backing Up to CD**

In order to back up to a CD, use the CD creator application supplied with the Hart InterCivic PCs. Refer to the online help for the specific steps for creating a CD.

Hart InterCivic suggests using a CD-R rather than a CD-RW. A CD-R is a one-time use—you can only write to it once, and then you can only read off of it. A CD-RW is readable/writable, and can be used multiple times like a floppy disk—you can read and write to it as often as you want. CD-Rs are inexpensive, and the data on the CD itself cannot be changed. This makes the CD-R option a good media for backing up data.

- After creating a CD, always navigate to the CD drive and verify that the CD contains all of the data intended for backup.
- Label the CD with the Jurisdiction, Election Title, Date, and eSlate application.
- Files the CD in a secure location.

## Appendix E: Print Queue File Format

The print file format used to load the Ballot Now print queue is a comma-separated value (csv) ASCII encoded file with a \*.bnp (Ballot Now Print) extension. The assumption is that this file is an export from a voter registration/information system. Each line in the file represents one printed ballot.

**See:**

The print queue and print output "Readme" files located at C:\Program Files\Hart InterCivic\Ballot Now\Print Queue on the Ballot Now PC.

Each required field is described as follows:

<b>Field:</b>	<b>Function:</b>
Validationcode	A number representing the result of validating the corresponding line in the input file. Validation codes are listed below. 8 characters, hexadecimal.
printid	A number representing each atomic print batch in Ballot Now. It can be helpful when editing the file. 6 characters.
bosselectionid	A number representing the BOSS election ID. 3 characters.
starting_sn	A number representing the serial number of the ballot. 8 characters.
totalsheets	A number representing the total number of sheets in the ballot. 2 characters.
partyindex	A number representing the party of the printed ballot. 2 characters. Translation between partyindex and the party string as entered in boss is found in the file "PartyList.csv".
precinctnumber	A number representing the precinct index in BOSS. 5 characters. Translation between precinctnumber and the precinct string as entered in BOSS is found in the file "PrecinctList.csv".
languageindex	A number representing the language of the printed ballot. 1 character. Translation between languageindex and the language of the printed ballot as determined by BOSS is found in the file "LanguageList.csv".
ballottype	A number representing the type of ballot printed. 3 characters. 20 - Election ballot, 21 - Test Ballot, 22 - Sample Ballot
externalrecordid	A number representing the external record ID of ballot printed. This field can be used for validation when Ballot Now is directed to print from a print queue file. If printing is not directed from a print queue file, this field is 0. 10 characters.
SAMPLE LINE, DESCRIPTIVE FIELDS	Validatecode, printid, bosselectionid, starting_sn, totalsheets, partyindex, precinctnumber, languageindex, ballottype, externalrecordid
SAMPLE FILE CONTENTS	00000000,000007,044,00000007,01,00,00007,2,20,0000000000 00000000,000008,044,00000008,02,00,00009,2,20,0000000000 00000000,000009,044,00000009,01,00,00001,0,20,0000000001 00000000,000010,044,00000010,02,00,00002,0,20,0000000002 00000000,000011,044,00000011,01,00,00005,0,20,0000000030 00000000,000012,044,00000012,01,00,00006,0,20,0000000040 00000000,000013,044,00000013,01,00,00007,0,20,0000000005

**Notes:**

## Appendix F: Paper Weights and Scanner Throughput

Use this conversion chart when planning Ballot Now paper ballot printing.

<i>Equivalent Weights in Paper<sup>a</sup></i>	
<i>Bond:</i>	<i>Offset/Book:</i>
20	50
24 <sup>b</sup>	60
28	70 <sup>c</sup>
30	75
31	80

a. Source: Georgia-Pacific/Unisource

b. Recommended weights are 24#-31# bond, 60#-80# offset

c. Commonly used stock is 70# offset Cougar Opaque, or Hart Secure Stock, with lower left corner cut 3/8" (upper left corner for ballots with stubs)

The chart below shows the throughput for select scanners, as of the time of publication. Numbers reflect duplex images (all ballots are duplex) and letter-size (8.5 X 11) pages.

<i>Scanner Throughput<sup>a</sup></i>	
<i>Scanner:</i>	<i>Estimated Throughput:</i>
Fujitsu M4097D	50 ppm <sup>b</sup>
Fujitsu M4099D	90 ppm
Kodak i80	35 ppm
Kodak 1500	40 ppm
Kodak i260	50 ppm
Kodak 3520	85 ppm
Kodak i660 (600 series)	120 ppm
Kodak i830	130 ppm
Kodak 9520	160 ppm
Hart eScan	15 ppm <sup>c</sup>

a. Source: various scanner vendors, numbers will vary by source

b. PPM = Pages Per Minute

c. With no resolution issues, includes ballot processing time

**Notes:**



## Procedure for Duplicating an Invalid Paper Ballot onto a Valid Paper Ballot

There should be teams of at least two people involved in the duplication process.

1. Ballots to be duplicated should be organized in precinct-number order.
2. Starting with the first ballot to be duplicated, select a blank ballot from the same election to match the precinct of the invalid ballot.
3. Place the two ballots side-by-side.
4. On the blank, valid ballot, record the serial number of the invalid ballot in any available whitespace.  
Example: "Replacement of invalid ballot S/N\_\_\_\_\_."
5. On the original, invalid ballot, record the serial number of the blank, valid ballot.  
Example: "Duplicated onto ballot S/N\_\_\_\_\_." Also record "Original" on this ballot.
6. Duplicate, by hand, the voter's choices from the original, invalid ballot onto the replacement ballot.
7. After all votes have been duplicated onto the replacement ballot, one person should call the choices recorded, while the other person verifies against the votes on the original ballot.
8. Place the original, invalid ballot into the Replacement Ballots Log Envelope.
9. Place the newly created, valid ballot in an envelope or bin to be scanned.
10. Repeat for each ballot to be duplicated.
11. The duplicated replacement ballots should be scanned as a separate batch. If using Ballot Now, note that these ballots are replacements in the **Scan Batch Notes** field.
12. Keep both sets of ballots and all paperwork as part of official election records.

## Appendix H: Ballot Now Steps Checklists



### Ballot Now Steps Checklist:

	Printing Ballots
	1. Determine requirements for ballot paper and ensure that the correct paper size for ballots is selected in BOSS.
	2. Ensure that the printer and scanner have been maintained, and that necessary replacement supplies are on hand.
	3. Open Ballot Now and log in as a user with Administrator or Operator permissions.
	4. Insert the eCM into a USB port.
	5. Insert the MBB designated for Ballot Now into the card device, and then go to the <b>Election</b> menu and click <b>Select Election</b> .
	6. When prompted, enter the eCM PIN and click <b>OK</b> .
	7. If prompted to verify adding a new election to Ballot Now, click <b>Yes</b> .
	8. In the <b>Select Election</b> window, highlight the target election and click <b>OK</b> .
	9. Remove the eCM.
	10. (Optional) Print a "Zero Report".
	11. Plan ballot printing in order to print sample, test, or election ballots.
	12. Go to the <b>Elections</b> menu and click <b>Program Options</b> . Select ballot printing and ballot stub options in the <b>Program Options</b> window.
	13. If printing to file, select the <b>Print to File</b> checkbox on the <b>Ballot Printing</b> tab of the <b>Program Options</b> window.
	14. Go to the <b>Print</b> menu and click <b>Print Ballots</b> . Select the precinct(s), ballot type, number of copies to print, language, starting serial number, and party (primary only) for the ballot(s).
	15. In the <b>Print Ballots</b> window, click <b>Print</b> .
	16. If printing to file, click <b>Select Printer</b> and select the Adobe printer.
	17. If printing to file, return to the <b>Print</b> menu and click <b>Print Ballots</b> . Select the precinct(s), ballot type, number of copies to print, language, starting serial number, and party (primary only) for the ballot(s).
	18. If printing to file, save the postscript file to a folder on the PC.
	19. If printing from a print queue, in the <b>Print Ballots</b> window, click <b>Print Server</b> to open the <b>Print Server</b> window.
	20. After printing ballots, click <b>Done</b> in the <b>Print Ballots</b> window.
	21. Print a "Printed Ballots By Precinct" report.
	22. Exit Ballot Now.



### Ballot Now Steps Checklist:

	<b>Scanning Ballots</b>
	1. Make certain that regularly scheduled scanner maintenance guidelines have been followed.
	2. Open Ballot Now and log in as a user with Administrator or Operator permissions.
	3. If using a client-server Ballot Now setup, clients can now log in.
	4. Insert the eCM into a USB port.
	5. Insert the MBB designated for Ballot Now into the card device, and then go to the <b>Election</b> menu and click <b>Select Election</b> .
	6. When prompted, enter the eCM PIN and click <b>OK</b> .
	7. In the <b>Select Election</b> window, highlight the target election and click <b>OK</b> .
	8. Remove the eCM.
	9. If using a client-server Ballot Now setup, clients can now select the election.
	10. If using a client-server Ballot Now setup, the server can now shut down the Ballot Now Image Processor (BNIP).
	11. If using a client-server Ballot Now setup, clients can now minimize Ballot Now.
	12. (Optional) Print a "Zero Report".
	13. Set up <b>Program Options</b> for scanning.
	14. Select the source tag for this batch.
	15. Scan ballots:
	15.1 Group the ballots into batches
	15.2 Load a batch into the scanner
	15.3 Scan ballots.
	15.4 Review and print scan results.
	16. Save scanned images.
	17. Repeat scanning steps 14-16 for each batch.
	18. When the scanning session is complete, print a "Scanned Ballots by Batch" report.
	19. Exit Ballot Now (first client(s), and then server).



### Ballot Now Steps Checklist:

	<b>Resolving Ballots</b>
	<i>Prepare for Write-in Resolution, if Applicable</i>
	1. Open Ballot Now and log in as a user with Administrator permissions.
	2. Insert the eCM into a USB port.
	3. Insert the MBB designated for Ballot Now into the card device and select the election.
	4. When prompted, enter the eCM PIN and click <b>OK</b> .
	5. In the <b>Select Election</b> window, highlight the target election and click <b>OK</b> .
	6. Remove the eCM.
	7. Define write-in candidates, if applicable.
	8. Set up <b>Program Options</b> for ballot resolution, if applicable.
	9. Exit Ballot Now.

(see next page for more “Resolving Ballots” steps)



### Ballot Now Steps Checklist:

	<b>Resolving Ballots</b> (continued)
	<i>Resolution Steps</i>
	1. Open Ballot Now and log in as a user with Administrator or Resolution Board permissions.
	2. If using a client-server Ballot Now setup, clients can now log in.
	3. Insert the eCM into a USB port (Stand-alone/Server PC only).
	4. Insert the MBB designated for Ballot Now into the card device, and then go to the <b>Election</b> menu and click <b>Select Election</b> (Stand-alone/Server PC only).
	5. When prompted, enter the eCM PIN and click <b>OK</b> (Stand-alone/Server PC only).
	6. In the <b>Select Election</b> window, highlight the target election and click <b>OK</b> (Stand-alone/Server PC only).
	7. Remove the eCM (Stand-alone/Server PC only).
	8. If using a client-server Ballot Now setup, clients can now select the election.
	9. (Optional) Print a "Zero Report" (Stand-alone/Server PC only).
	10. Go to the <b>Resolve</b> menu and click <b>Resolve</b> .
	11. If working with a primary election, set the <b>Party</b> filter to show ballots appropriate to resolution team member at that station.
	12. On the <b>Ballot Filter</b> tab, select all of the checkboxes except <b>Ballot OK As Scanned</b> and click the <b>Refresh</b> button.
	13. Select batch(es) targeted for resolution.
	14. Resolve batches sorted for AutoResolve.
	15. Manually resolve (other) undervotes.
	16. Manually resolve (other) overvotes.
	17. Manually resolve (other) damaged contests.
	18. If applicable, resolve write-in votes.
	19. When finished resolving batches, <u>C</u> trl-click to select multiple checked out resolved batches in the selection tree, and then right-click and choose <b>Check In</b> .
	20. Close the <b>Resolve Ballot</b> window.
	21. Exit Ballot Now (first client(s), and then server).



### Ballot Now Steps Checklist:

	<b>Writing CVRs and Preparing for Tabulation</b>
	1. Open Ballot Now and log in as a user with Administrator permissions.
	2. Insert the eCM into a USB port.
	3. Insert the MBB designated for Ballot Now into the card reader, and then go to the <b>Election</b> menu and click <b>Select Election</b> .
	4. When prompted, enter the eCM PIN and click <b>OK</b> .
	5. In the <b>Select Election</b> window, highlight the target election and click <b>OK</b> .
	6. (Optional) Print a “Zero Report”.
	7. Perform any necessary scan batch or ballot management.
	8. Write Cast Vote Records (CVRs) to MBB from the <b>Write Cast Ballots to MBB</b> window.
	9. Make certain that an eCM is installed and close the MBB.
	10. Print the “Election Report” and “Election MBBs” report.
	11. Print a “Scanned Ballots by Batch” report.
	12. Exit Ballot Now.
	13. Send the Ballot Now MBB(s) and the reports to the counting station (Tally).
	14. In order to record CVRs on another MBB after the first has been taken to Tally, insert a blank Election MBB, log in to Ballot Now, and follow prompts. When the <b>MBB Initialization</b> message displays, select <b>Open this MBB for Recording CVRs</b> , click <b>OK</b> , and continue.
	15. If using incremental MBBs for the <i>same</i> election source (Early Voting, Absentee, or Election Day), repeat steps to scan, resolve, and write ballots/CVRs for those MBBs.
	16. If using incremental MBBs for a <i>separate</i> election source (Early Voting, Absentee, or Election Day), repeat steps to scan, resolve, and write ballots/Cast Vote Records for those MBBs, <i>making certain to identify the batch source before scanning the first batch</i> .
	17. Make certain that an eCM is installed and close any remaining MBBs.
	18. Send the remaining Ballot Now MBB(s) and the reports to the counting station (Tally).
	19. Print Ballot Now reports.
	20. Back up the Ballot Now database to CD.
	21. Close the election in Ballot Now.
	22. Remove the eCM.
	23. Exit Ballot Now.

**Notes:**



