Electronic Pollbook Refresh
Election Inspector Manual
For Windows 10 & BitLocker Flash Drives

Michigan Department of State
Bureau of Elections
April 2022

Electronic Pollbook Manual WIN10
Provided by the Michigan Bureau of Elections
Updated as of 04.22.2022

Electronic Pollbook User Manual - Table of Contents

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Introduction to the Electronic Pollbook

The Bureau of Elections developed computer software that can be used in the polling place on Election Day to process voters and generate precinct reports. The electronic pollbook (EPB) software is downloaded from the Qualified Voter File (QVF) software and is loaded to a laptop prior to each election. Once the EPB software is loaded on the laptop, the software allows election inspectors to look up a voter's registration record, confirm their registration is correct, and assign a ballot to that voter, essentially automating the typical paper process. After the election is complete, the EPB software will generate reports to complete the official precinct record (paper binder pollbook) and a voter history file that can be uploaded into the QVF to update voter history in a matter of minutes.

Key Features
☆ Access current voter registration and absent voter information in the precincts (from the day prior to the election, in most cases)
☆ Locate a voter's registration record by swiping their driver's license with a magnetic card reader
☆ Assign and record the voter's ballot immediately upon registration confirmation
☆ Look up voters registered within the jurisdiction but not in the assigned precinct
☆ Print accurate reports, including a calculated ballot summary, the list of voters, and remarks
☆ Upload voting history quickly and accurately

Important Considerations
Maintain security throughout the EPB process by using an encrypted flash drive. The flash drive must be password protected, and passwords should **never** be kept with flash drives. The encrypted flash drive must be used to transfer files back and forth between the QVF computer and the EPB laptop.

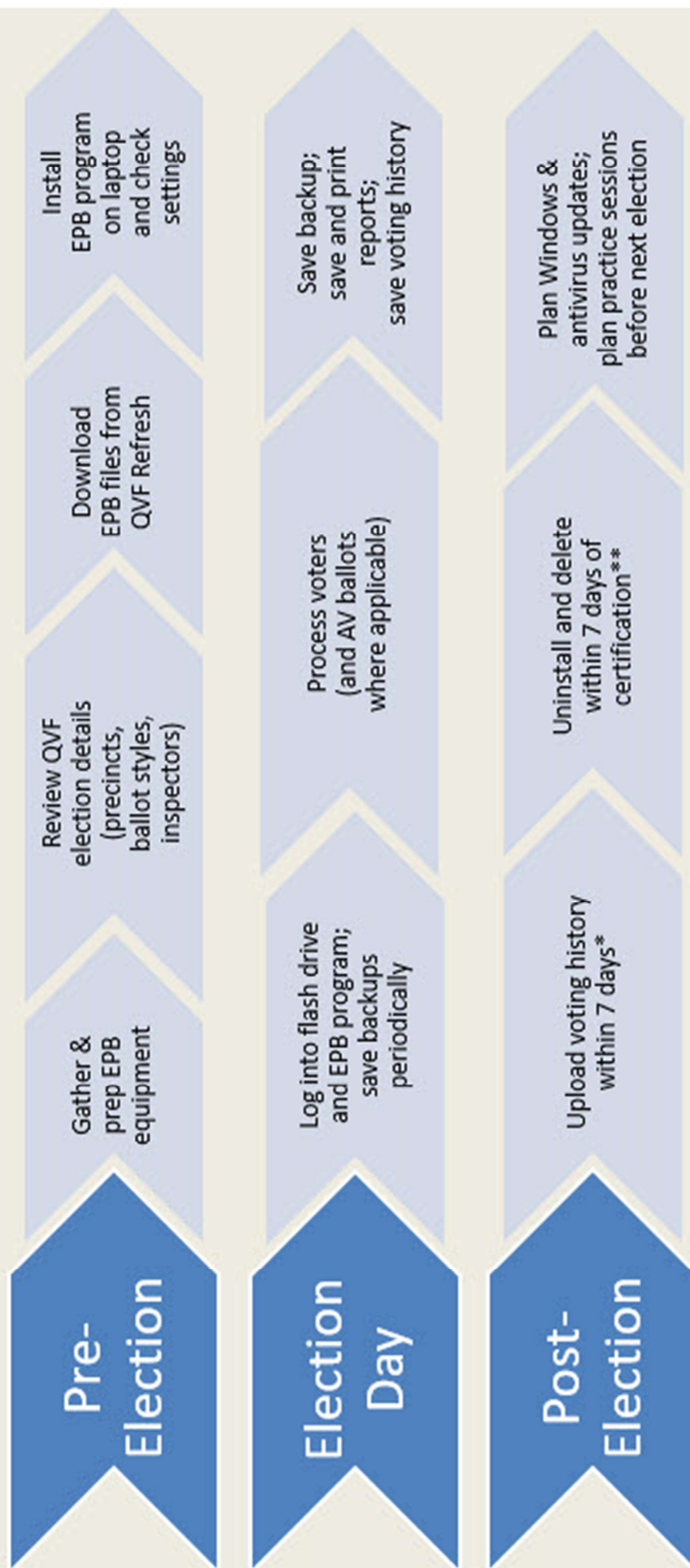**Pre-election file transfer: QVF to EPB**   **Post-election file transfer: EPB to QVF**

The laptop must not be connected to any networks (must be in "airplane mode" with wifi disabled) when the EPB software is installed on the laptop. Windows Updates and antivirus updates must be done regularly between elections.

It is also important to understand when to delete files. After uploading EPB data to QVF and ensuring a paper copy of EPB files has been retained, delete all EPB files seven days after the final canvass (unless there is a pending recount, court challenge, or audit/Secretary of State order). This keeps voter data secure and prevents the wrong files from being used in future elections.

Most importantly, practice! Walking through the manual well before every election will ensure you understand all of the features of the EPB software and will prepare you for successful implementation come election day. Remember it is important to delete all practice files, too!

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EPB PROCESS OVERVIEW

Pre-Election

- Gather & prep EPB equipment
- Review QVF election details (precincts, ballot styles, inspectors)
- Download EPB files from QVF Refresh
- Install EPB program on laptop and check settings

Election Day

- Log into flash drive and EPB program; save backups periodically
- Process voters (and AV ballots where applicable)
- Save backup; save and print reports; save voting history

Post-Election

- Upload voting history within 7 days*
- Uninstall and delete within 7 days of certification**
- Plan Windows & antivirus updates; plan practice sessions before next election

*Only upload history after an election. Do not practice this step.

**Unless a recount, court challenge, or audit is pending.

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Getting Started: Election Day Reminders

1. **Wireless internet access** – *The laptop <u>must</u> be in airplane mode with wifi disabled on election day.* To verify airplane mode is enabled, click the notifications icon and make sure the Airplane mode is blue and that the Wi-Fi button is gray*.*

2. **Don't skip page 7, Step 3** – It is important when you save the backup file that you browse to the location that the file is supposed to be saved to, which is the flash drive. It does not automatically save to the flash drive.

3. **Unable to Record an Absentee Ballot** – Click the File menu, click Options, and add a checkmark to "Allow the recording of Absentee Ballots."

4. **Spoiling an Absentee Ballot** – Absentee ballots are never spoiled in the EPB on Election Day. There are other procedures in place for a voter surrendering their absentee ballot. The duplication process does not include spoiling the original ballot number; see FAQ # 11 on p. 31.

5. **Recording PDF ballots / ballots sent electronically** – An absent voter issued an electronic ballot is processed in the EPB with the same ballot number originally recorded by the clerk. Electronically issued MOVE ballots returned by the voter on 8 ½ x 11 paper are recorded in the EPB using the original "ET#." The number of the ballot onto which the votes are duplicated is NEVER assigned to the absent voter in the EPB. Simply use the duplication process established for other absent voter ballots that require duplication and record the number of ballots used in duplication on line H of the Ballot Summary.

6. **Don't forget page 27** – The Voting History file (epb_history.csv) must be saved to the flash drive in addition to the 3 PDF reports and the backup file at the end of the night.

7. **Even if your laptop freezes, it's going to be OK**! This reminder is also FAQ # 15 on p. 31.
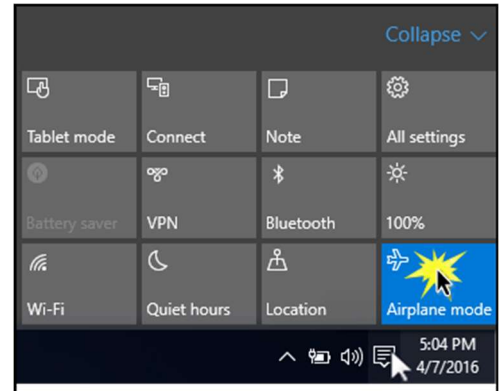
   While other workers continue to process voters using the paper backup:

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

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Election Day EPB Tasks: Election Inspector's Guide

## Prepare the EPB for Opening the Polls

Pull the laptop out of the case, plug it into a surge protector, and plug the surge protector into the wall. The power cord may have two pieces. Keep the power cord plugged in throughout the day to maintain a 100% charged battery. Plug the magnetic card reader and mouse into USB ports. Then turn the laptop on. Once the laptop has booted up, make sure that the laptop cannot connect to the internet by turning on Airplane Mode with wifi disabled (see pg. 5).

Log into the encrypted flash drive

The encrypted flash drive is a vital component of the EPB software program. Use this password-protected file storage device to protect voter data, store the backup file, and store all the work done on Election Day so the Clerk can update voter history and create precinct reports. When saving files, make sure the files are being saved to the encrypted flash drive.

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

1. Click the Windows Explorer folder icon
2. Click Removable Disk
3. Enter the password
4. Click Unlock
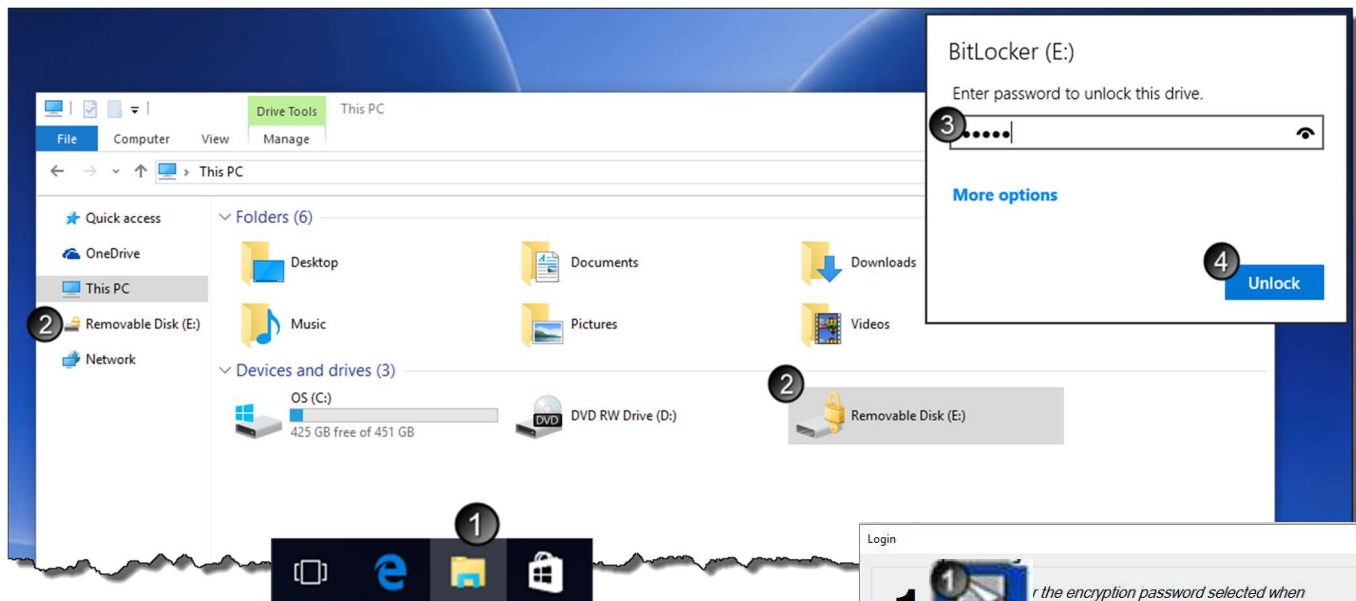
Log into the EPB software

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

To log into the EPB software:

1. Double click on the Electronic Poll Book icon in the upper left corner of the desktop
2. Enter Encryption Password and click Enter
3. Enter Username and User Password and click Enter

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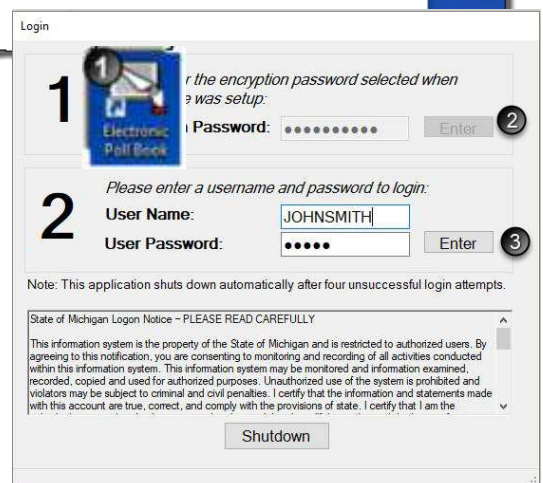
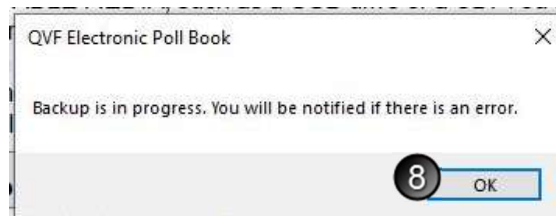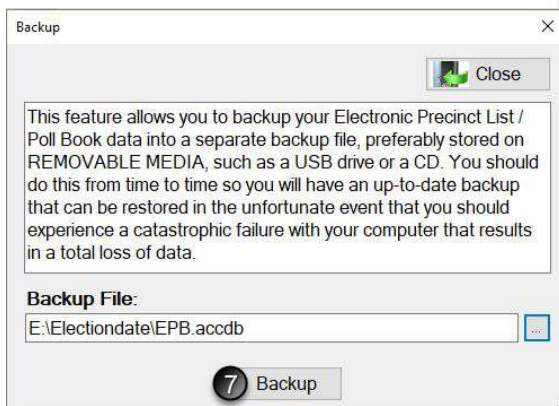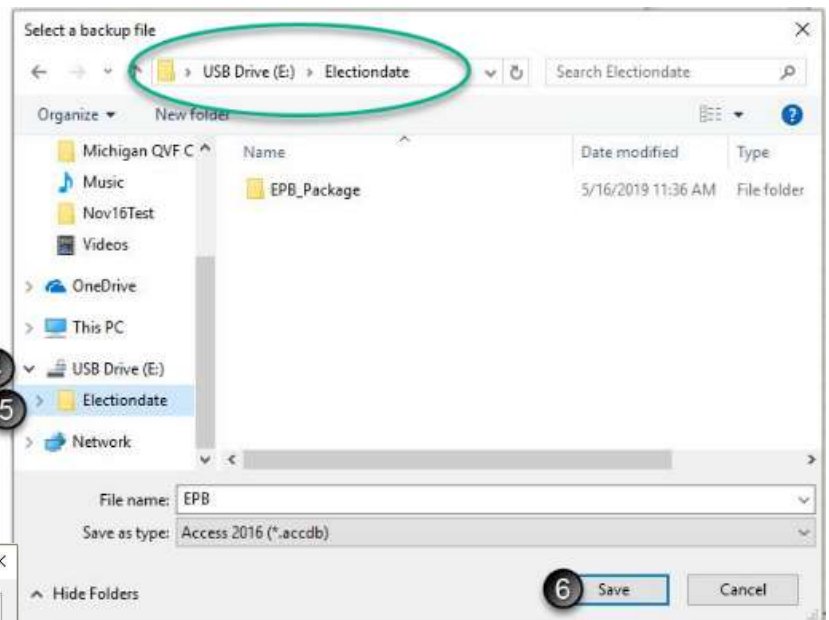# Save the First EPB Backup: Redirection Action Required!

You must keep the encrypted flash drive plugged into the laptop all day. Save a **Backup** periodically throughout the day to save voters that have been processed. This ensures that data will not be lost if there is a hardware failure. Pay attention to your laptop's settings when performing the initial **Backup**. The letter labeling your encrypted flash drive in Windows Explorer may vary since it is dependent on the laptop and port being used.

To Back up the EPB:

1. Click File

2. Click Backup

3. Click this button ⎣..⎦ at the end of the file path field

Backup

This feature allows you to backup your Electronic Precinct List / Poll Book data into a separate backup file, preferably stored on REMOVABLE MEDIA, such as a USB drive or a CD. You should do this from time to time so you will have an up-to-date backup that can be restored in the unfortunate event that you should experience a catastrophic failure with your computer that results in a total loss of data.

Backup File:

C:\EPB.accdb

Backup

4. Select Removable Disk (Drive letter may vary). Use the encrypted flash drive to save files throughout the day and after the polls close. Future backups should remember the drive you select in this step.
5. Double-click the [ElectionDate] folder
6. Click Save
7. Click Backup
8. After a few seconds, the Backup is in progress message will appear, and the backup continues briefly in the background.

Select a backup file

USB Drive (E:) > Electiondate

Name	Date modified	Type
EPB_Package	5/16/2019 11:36 AM	File folder

File name: EPB

Save as type: Access 2016 (*.accdb)

Save   Cancel

Backup

This feature allows you to backup your Electronic Precinct List / Poll Book data into a separate backup file, preferably stored on REMOVABLE MEDIA, such as a USB drive or a CD. You should do this from time to time so you will have an up-to-date backup that can be restored in the unfortunate event that you should experience a catastrophic failure with your computer that results in a total loss of data.

Backup File:

E:\Electiondate\EPB.accdb

Backup

QVF Electronic Poll Book

Backup is in progress. You will be notified if there is an error.

OK

The laptop and EPB software are now ready for voters!

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Read and Use the EPB Main Screen to Process each Voter

The EPB main screen is divided into three sections. Take a moment to become familiar with the various parts of the screen. **Make sure the top line lists the correct election and precinct number.**

Voter Search: The Voter Search section of the screen is the precinct list. All voters in your precinct will be listed under **This Precinct** tab**.** The **Other** tab provides access to the lists of other precincts in the jurisdiction. The **Unlisted** tab is available to add voters not found in either list in certain situations.

Voter Details: The Voter Details section of the screen shows the voter's registration information at the top, including the appropriate **Ballot Style** that should be issued to the voter. The Geography button provides detailed district information for each voter. The middle of the screen is the "Lock this Voter Record" action box where ballots will be assigned and recorded. Voting status flags appear at the bottom of the screen. This portion of the screen is important to verify the status before issuing a voter a ballot.

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

The EPB software contains the voter list for the precinct, records the ballots issued, and creates the List of Voters for the permanent record of the precinct. With a few clicks, a voter may be verified and assigned a ballot.

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

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Record a Voter Not in Possession of Photo ID

The voter must complete an *Application to Vote,* and their photo identification must be verified or the *Affidavit of Voter Not in Possession of Picture Identification* must be completed before processing a ballot in the EPB software. When a voter uses the Affidavit of Voter Not in Possession of Picture Identification, click the up arrow to increment the Affidavits of Voter Without Photo ID counter, or click into the box, delete the number, and type in the new total. This count is not tied to an individual voter but is the running total for the precinct for the election.

This number will be uploaded to the Qualified Voter File with voting history, and clerk's office staff will be able to review and correct this number in QVF after the election.

To record a Voter Not in Possession of Photo ID:
1. Click the up arrow button next to the Affidavits of Voter Without Photo ID
   (or, click in the field, delete the number that's there, and type the new total)

Assign a Ballot

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

1. Swipe the voter's driver's license through the magnetic card reader or type the voter's name into the DLN/Name field, entering the last name first. If typing, select the correct voter and then you must click on "Lock this voter record," otherwise skip to Step 2.

2. Verify the voter's information on the *Application to Vote* matches EPB.

3. Click Regular ballot

4. Enter the next available ballot number in the **This ballot number will be assigned** box (this number will auto fill after the first number for the ballot style has been entered)

5. Click OK, and the voter's name will now be added to the List of Voters.

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Verify the ballot was issued

Click OK on the confirmation window (if enabled). After you assign the ballot, the main screen returns. Three places verify the ballot was processed in the EPB software. Further duties may be divided amongst election inspectors, including completing the *Election Inspector Completes* portion of the *Application to Vote* and providing the voter a ballot in a secrecy sleeve. The voter will then go to a voting booth to vote their ballot and return the ballot to the tabulator.

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Process Voter with Status Flag(s)

Some voters have status flags that need to be addressed prior to issuing a ballot. On the paper precinct list, these were indicated with a code. Something happened in the registration process or in subsequent mailings that needs follow-up. For example, a signature was not obtained, the voter missed checking an answer to the citizenship question, an absentee ballot was issued, the clerk received reliable information the voter may have moved, etc.

A voter has a status flag if he or she has a red question mark next to his or her name. When a red question mark is found, read the message in the Voter Status window at the bottom of the Voter Details screen to determine the issue.

Absentee Ballot sent by clerk

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

Absentee Ballot sent/received by clerk

This voter was sent an absentee ballot and returned it to the Clerk. **DO NOT** issue this voter a ballot as they have already voted.

*In the extremely rare case of a clerical error (such as if a ballot was recorded in QVF for the wrong voter), **after approval from the clerk** a ballot may be issued. Process as instructed and click through the warning.*

Voter's status is Challenge: Age, Citizenship Formal or Residency Formal

This voter has been formally challenged and must complete the challenge process before being issued a challenged ballot. Seek assistance from the precinct chairperson to complete this process. The EPB processing is the same as a regular voter except Challenged ballot is selected in the Issue a ballot box. A CHAL will appear next to the voter's name after processed.
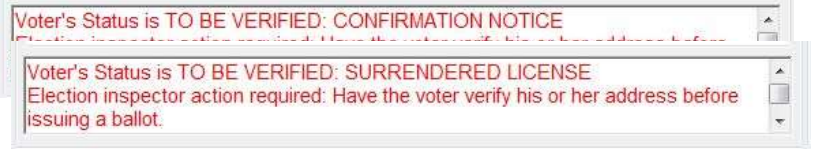
Must show ID before voting (Federal Requirement)

This voter must show photo ID or a paycheck, government check, utility bill, bank statement, or a government document which lists his or her name

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and address (if no photo ID but provides one of the documents listed above, must sign the *Affidavit of Voter Not in Possession of Photo ID* as well) prior to being issued a ballot.
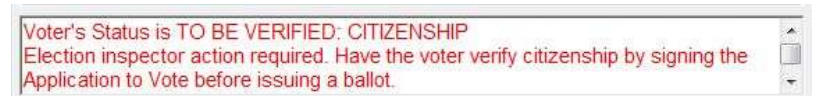
Voter's Status is V: Address Unclear, Confirmation Notice, or Surrendered License

This voter must verbally confirm the address listed in the EPB. If the voter does not confirm the address, the procedure for voters that have moved must be taken.

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

Voter's Status is V: Confirm Citizenship

This voter must verify their citizenship by signing the Application to Vote. If the voter does not complete the Application to Vote, DO NOT issue a ballot.

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

Voter's Status is V: Sign Registration Card

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

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

Voter Message: Challenged Ballot

> Election Inspector Action Required - This voter's ballot must be recorded as Challenged.
> VOTING STATUS: Did not vote in precinct.
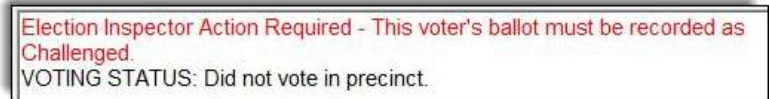
When the EPB indicates in red text that an inspector action is required to record a voter's ballot as challenged (shown above), perform the actions listed below.

(These voters registered within 14 days of the election with an alternative form of residency verification.)

To issue a Challenged ballot:

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

1. Click Challenged ballot
2. Verify the ballot number being issued is correct or enter the ballot number and click OK
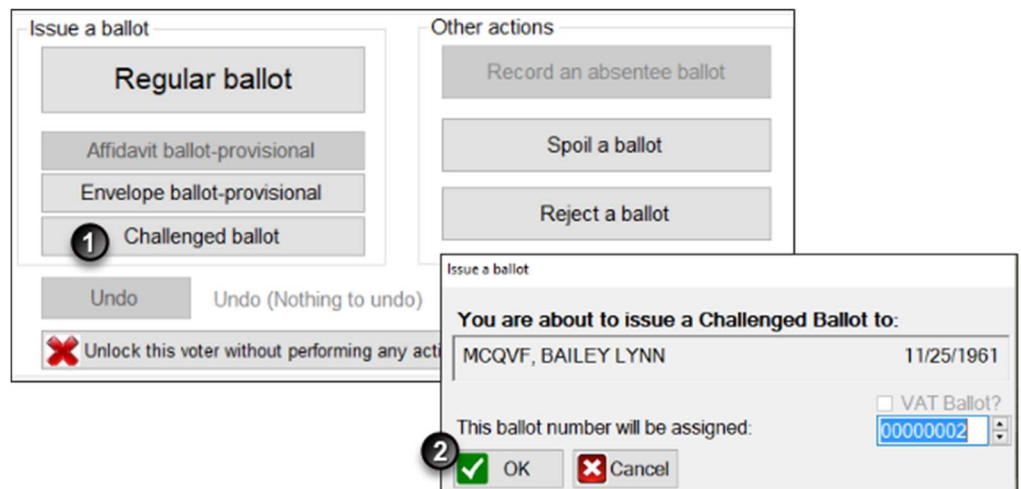
Important note:
The Challenged ballot procedure for these voters is *different* than formal challenges. Outside of the EPB, perform the following steps when issuing the challenged ballot:

1. Write the ballot number in pencil on the upper left-hand corner of the ballot, being sure to avoid any barcodes or timing marks (**not** on the ballot stub).
2. Conceal this number with a small piece of white paper taped over the number.
3. Use the Challenged ballot button to enter the voter's ballot number into the e-Pollbook. If your precinct has more than one ballot style, issue the ballot style noted on the receipt.
4. The voter will then vote the ballot and place the ballot in the tabulator as usual.

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Process a Spoiled Ballot

A voter may request a new ballot if needed and a new ballot must be issued, no matter how many times the voter requests a new one. The voter should write "SPOILED" at the top of their ballot, remove the ballot stub, and place in the Spoiled Ballot Envelope. Change the *Application to Vote* to note the new ballot number and record the new ballot in the EPB software.

To spoil a ballot:

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

1. Click Spoil a ballot
2. Click OK – the software will automatically enter the ballot number you are spoiling.
3. Click OK

After the ballot is spoiled, the regular ballot process must be used to <u>issue a new ballot to the voter.</u>
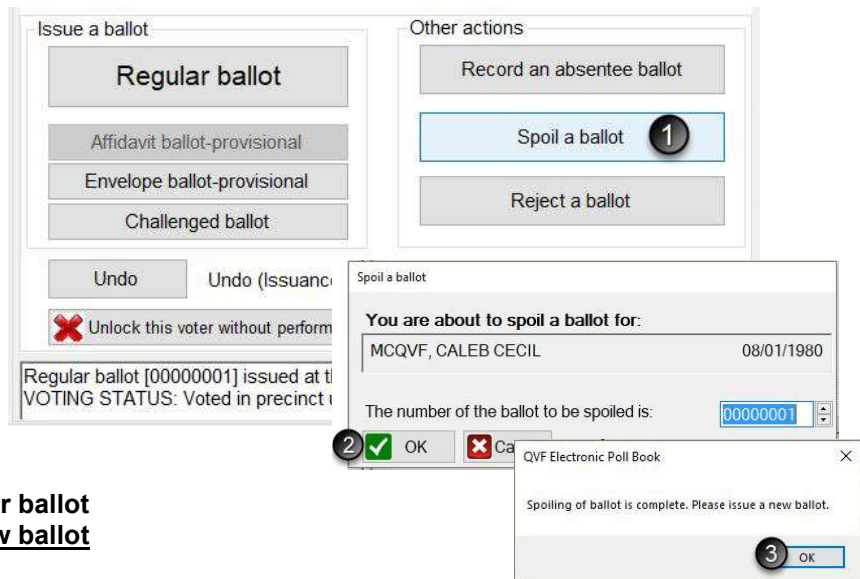
Once the process is complete, verify the recording was done properly by looking at the Voter Status screen and the List of Voters.

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Find a Voter Not Appearing On This Precinct List

Find a Voter in Other Precinct in Other Tab

Election inspectors can look up voters throughout the jurisdiction, not just in the precinct they are working. If the voter does not pop up after a search, click on the **Other** tab. If the voter is registered to vote within the jurisdiction, click on their name and view their polling location. Explain to the voter that they are registered in a different polling location and/or precinct and direct them to the appropriate location. Be sure to click back to the **This Precinct** tab before processing the next voter.

Add an Unlisted Voter

If a voter is not found under the **This Precinct** tab or the **Other** tab, the citizen was not registered to vote in the Qualified Voter File (QVF) for that jurisdiction at the time of the EPB download.

If the voter registered at the local clerk's office after the EPB was downloaded and has a receipt, add the voter to the list (steps 1-4) and see the next section of this manual, *Process Unlisted Voter with a Receipt*.

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

To add a voter to the list:

1. Click the Unlisted tab
2. Click New
3. Enter the voter's information
4. Click OK

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

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

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

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Process an Unlisted Voter with a Receipt

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

To add a voter to the list:

1. Click the Unlisted tab
2. Click New
3. Enter the voter's information
4. Click the "Voter Receipt" box to enable the option and the cursor automatically moves to the License field
5. If the voter has a DL/PID, swipe the DL/PID or scan the barcode to add the id number and the Unlisted Voter window will automatically close. The ID number can also be hand-typed, then click OK.

After the voter is added, a ballot number must be assigned. Follow the instructions provided on the the correct ballot type button (Regular or   receipt to select Challenged).

If the receipt says that the ballot must be prepared as "challenged" perform the following steps:

1. Write the ballot number in pencil on the upper left-hand corner of the ballot, being sure to avoid any barcodes or timing marks (**not** on the ballot stub).
2. Conceal this number with a small piece of white paper taped over the number.
3. Use the Challenged ballot button to enter the voter's ballot number into the e-Pollbook. If your precinct has more than one ballot style, issue the ballot style noted on the receipt.
4. The voter will then vote the ballot and place the ballot in the tabulator as usual.

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

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Process Other Voter Types

Process a Voter Challenged by a Challenger

If a voter is challenged by a Challenger, the voter must be issued a Challenged ballot and that Challenged ballot must be recorded in the EPB. Please note, the Challenge must be directed to the chairperson and all steps must be carried out prior to issuing the challenged ballot. Follow the instructions below to issue a challenged ballot in the EPB software.

To issue a Ballot to a Challenged Voter:

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

1. Click Challenged ballot
2. Verify the ballot number being issued is correct or enter the ballot number and Click OK

Important note: The ballot number must be written on the physical ballot and covered with a piece of paper or post-it tapes. In addition, full documentation of the challenge must be recorded in the <u>paper</u> binder pollbook.

Record an Absentee Ballot

If absentee ballots are processed in the precinct and the Clerk has instructed entry into the EPB software versus using the paper Addendum List of AV voters, follow the instructions below to process the ballots in the EPB software.

To record an absentee ballot:

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

1. Click Record an absentee ballot
2. Verify ballot number (enter if not auto filled) is the same as assigned and click OK

Once the process is complete, verify the recording was done properly by looking for AV next to the voter's name, the Voter Status screen and the List of Voters.

NOTE: If processing a FWAB or electronic MOVE or ACCESSIBLE ballot, simply accept the regular AV ballot number assigned or enter the AV ballot number assigned by the clerk.

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Record a Voter Assist Terminal (VAT) Ballot

When a voter requests to use the Voter Assist Terminal (VAT) to vote, issue a blank ballot (with a numbered stub). Since they will make their selections using the VAT which prints their votes on a blank ballot, they will not receive a regular ballot with a traditional number sequence.

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

To record a VAT ballot:

1. Click the button for the kind of ballot being assigned (Regular, Provisional…)
2. Add a checkmark to the VAT box
3. If this is the first VAT ballot of the day, enter the ballot number in, otherwise, confirm the VAT ballot number matches the sequence and click OK.

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Avoid or Correct Mistakes

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

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

To correct a mistake:

1. Search for the voter, using the DLN/Name search box
2. Select the voter
3. Click Lock this voter record
4. Click Undo
5. Click Yes

Notice the action you are undoing is in brackets next to the Undo button and in the confirmation box. Use the *Application(s) to Vote* to ensure you are making the correction properly. The **Undo** function should <u>not</u> be used to attempt to fix major mistakes. If several ballots have been issued out of sequence, correct this type of error with a remark and by ensuring the next voter is correct from that point forward.

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

See FAQ #1 at the back of this manual, if a voter was issued an incorrect ballot style.

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Make a Remark

Any time a correction is made, a remark should be entered. In addition, remarks should be made throughout the day to document events that happened in the polling place that are significant. Providing this information aids the Clerk in understanding what took place throughout the day. There are two types of remarks , General and Specific. Be sure to use the correct type based on the comment you need to make.

To make a general remark:

1. Click File (or the *General Remarks* button and skip to step 3)

2. Click Remarks

3. Click New

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

5. Click OK

6. Click Close
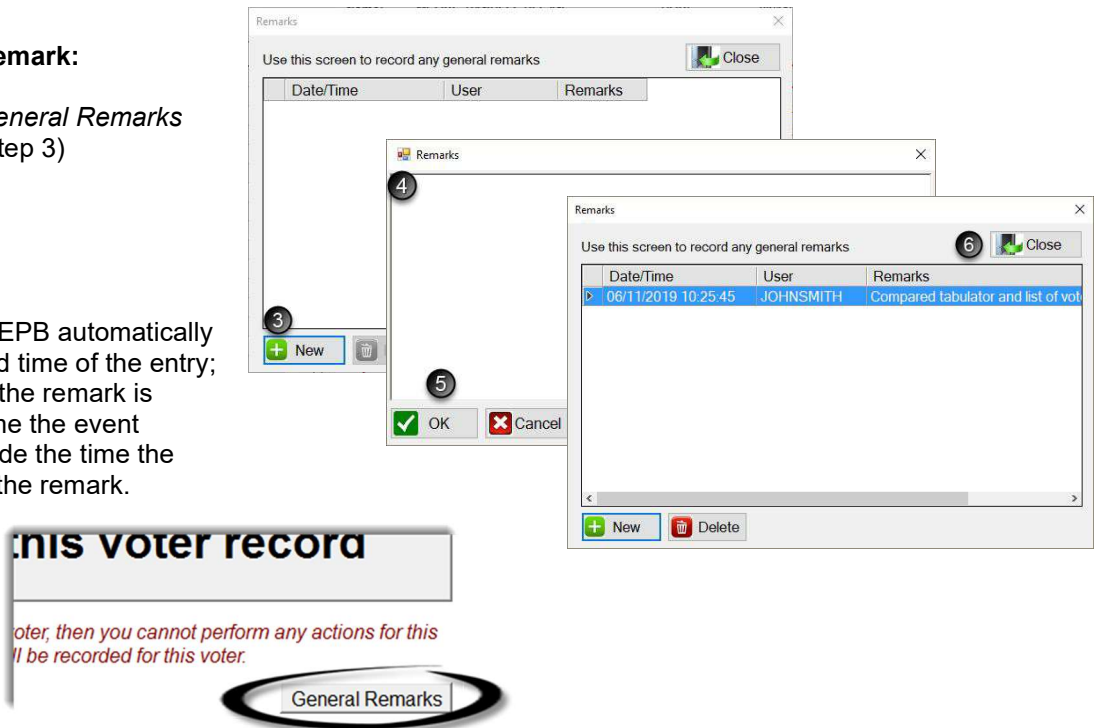
To make a voter remark:

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

1. Click Voter Remarks

2. Enter Remark, the EPB automatically records the Voter Name, Voter Number, and date and time of the entry, however, adding the time is recommended as the EPB is not always available for remark entry at the time the event took place.

3. Click OK

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

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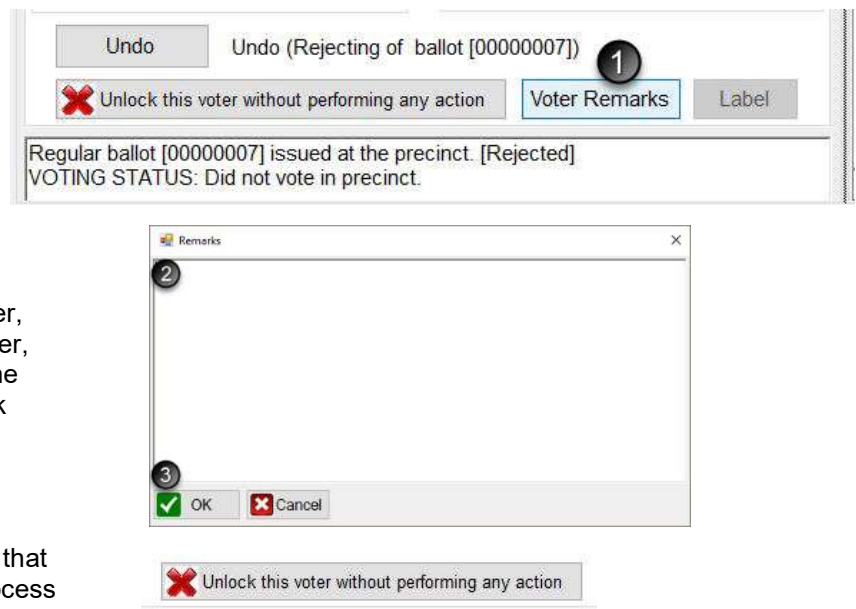
Reject a Ballot

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

- **Exposure** – A voter intentionally exposed his or her marked ballot to others at the polling place.
- **Missing stub/ballot number does not agree** – It is discovered during the ballot serial number verification process that the stub on the ballot that was issued to the voter at the polls is missing or bears a different number than the number recorded on the voter's *Application to Vote.*
- **Ballot was left in booth/voter did not tabulate** – A voter neglected or refused to tabulate his or her ballot.

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

To Reject a ballot:

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

1. Click Reject a ballot
2. Verify ballot number is the same as assigned - Click OK
3. Click OK
4. Record a Voter Remark (See previous page) that includes the reason for rejection

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

Mark Unissued Ballots Defective

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

To record defective ballots:

1. Click File
2. Click Un-issued Defective Ballots
3. Click Render Ballots Defective
4. Select the ballot style, enter the ballot number range, and record the reason the ballot is defective.
5. Click OK
6. Click Close

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Back up Regularly Throughout the Day

Approximately every half hour, the EPB software will notify the user that a backup is overdue. It is important to take a moment after processing a voter to update the backup. This will ensure the flash drive has the most recent data entered into the EPB in the event of a hardware failure.

To Backup:

1. Click Backup Overdue
2. Click Backup – the file path should default to the encrypted flash drive and [ElectionDate] folder once the first backup has been completed
3. Click Yes to overwrite the existing backup file
4. Click OK

If you get an error that the drive or path is not accessible, log into your flash drive and try again
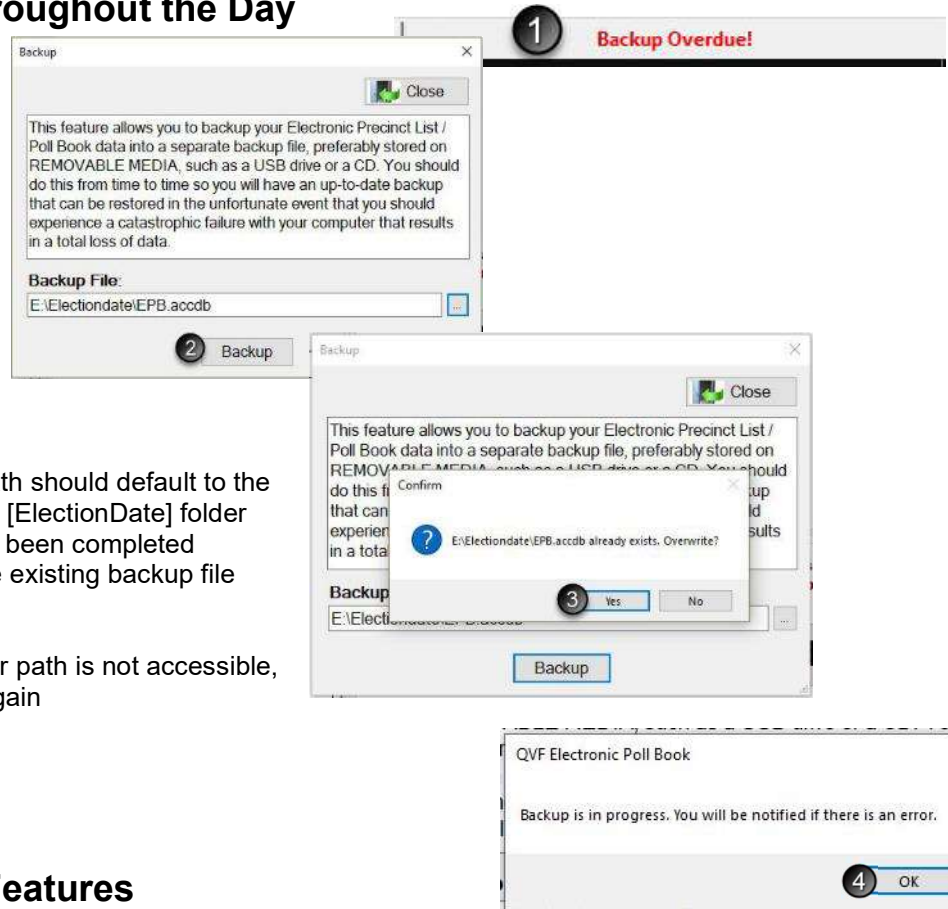
Understand Timeout Features

For security reasons, the EPB software will logout a user after thirty minutes of inactivity. This can be avoided by moving the mouse and/or clicking into the DLN/Name field if there are long periods of inactivity. If the EPB software logs out the user, simply reenter the User Name and User Password and click Enter.

Switch Users

To switch users, simply use the **Logout** function by:

1. Click File
2. Click Logout

Then simply log in with the new username and password.

The current user is listed in the lower right hand corner of the screen as illustrated:

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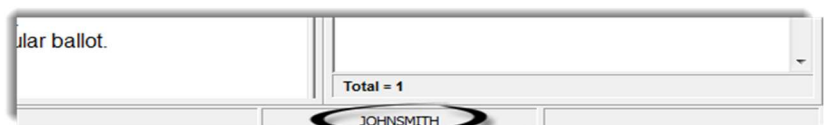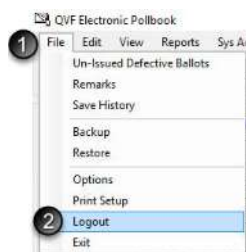
Restore the Database

In the event the laptop fails and the EPB needs to be reinstalled on a new laptop on election day, the **Restore** feature will reload all of the information entered up to the point of the last backup. The only voter data missing would be entries made in the EPB since the last backup. That information can be added back in using the *Applications to Vote*. The Administrator username and password must be obtained from the Clerk for the initial login when the software is re-installed**.**

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

1. Click File

2. Click Restore
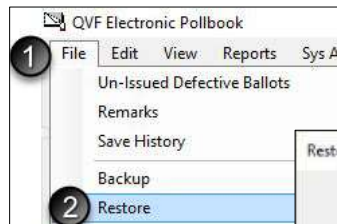
3. Click this button [..] at the end of the path field
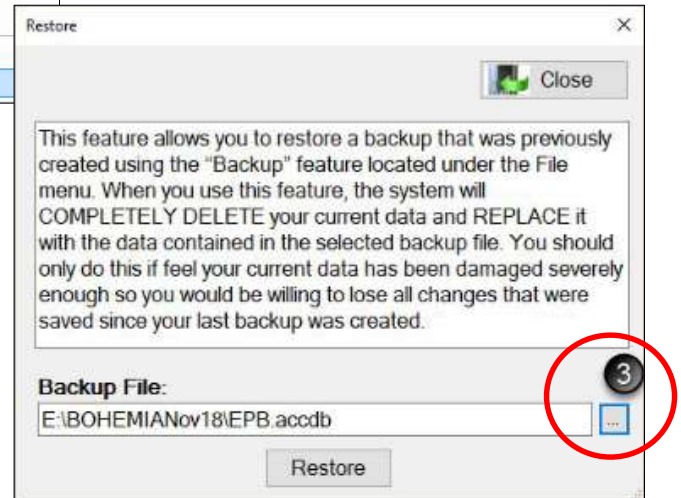
4. Make sure the encrypted flash drive is selected (Removable Disk E:) Drive letters may vary.

5. Double click [ElectionDate] folder

6. Click Open

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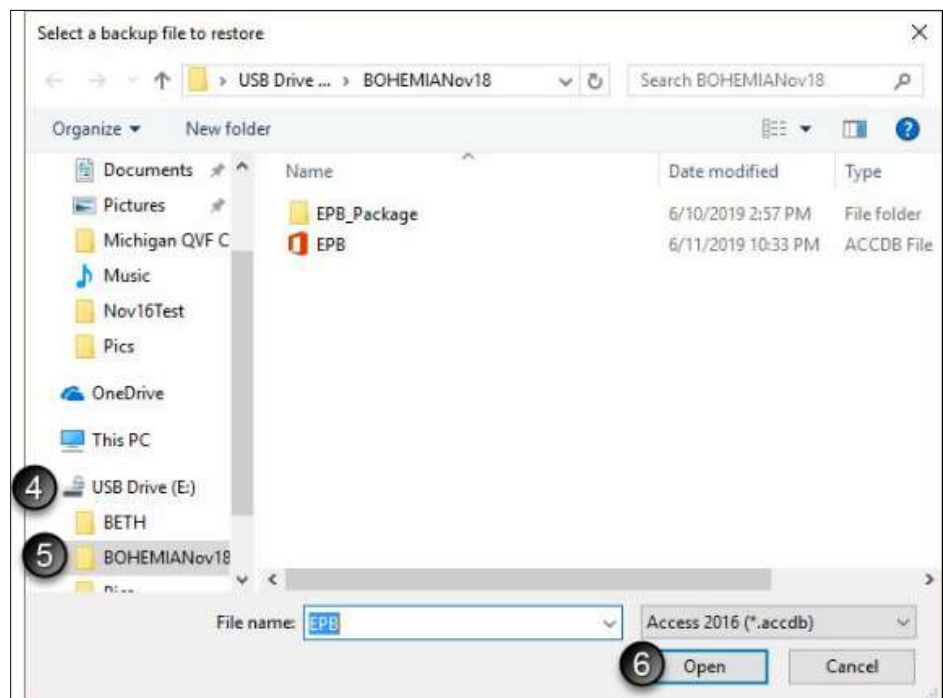
7. Click Restore

8. Click Yes

9. Click OK

After restoration is complete, the election inspectors should review the Options under File>Options, then log out of the EPB and log back in with the username and password they had used prior to the laptop/software failure.

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

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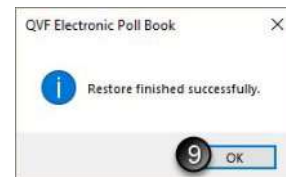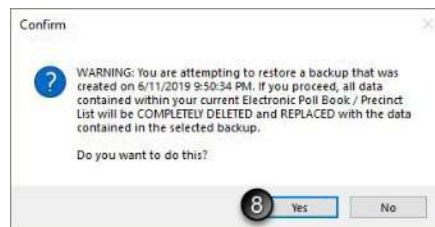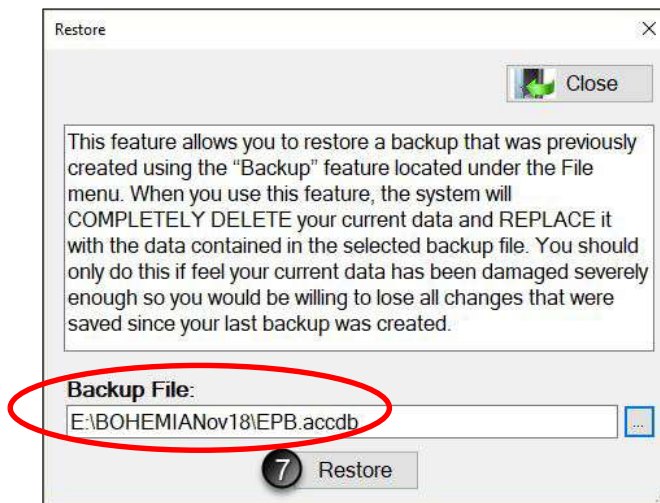
Election Day: Close the Polls

After the close of polls on Election Day, data processed in the EPB software must be saved one last time to the encrypted flash drive and reports must be generated to complete the paper binder pollbook. The EPB software generates the three reports necessary for completion of the paper binder pollbook/official record of the precinct in just a few steps. Those reports include the Ballot Summary, the List of Voters, and the Remarks report. After reports are saved and printed, save voter history in a manner that can easily be uploaded into the Qualified Voter File (QVF) in a matter of seconds, ensuring accurate recording of voters in the master voter registration database.

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

1. Save one last **Backup** file
2. Save and print the **Ballot Summary** Report
3. Save and print the **List of Voters** Report
4. Save and print the **Remarks** Report
5. Save **Voting History** (This is a frequently missed step, so please pay extra attention here!)
6. Look at the files saved on the flash drive and go back to save anything that was missed.

Save Backup

After all voters have been processed in the EPB, perform one last **Backup** to ensure all data is saved to the encrypted flash drive.

1. Click File
2. Click Backup
3. Click Backup
4. Click Yes
5. Click OK

If you get an error that the drive or path is not accessible, log into your flash drive and try again.

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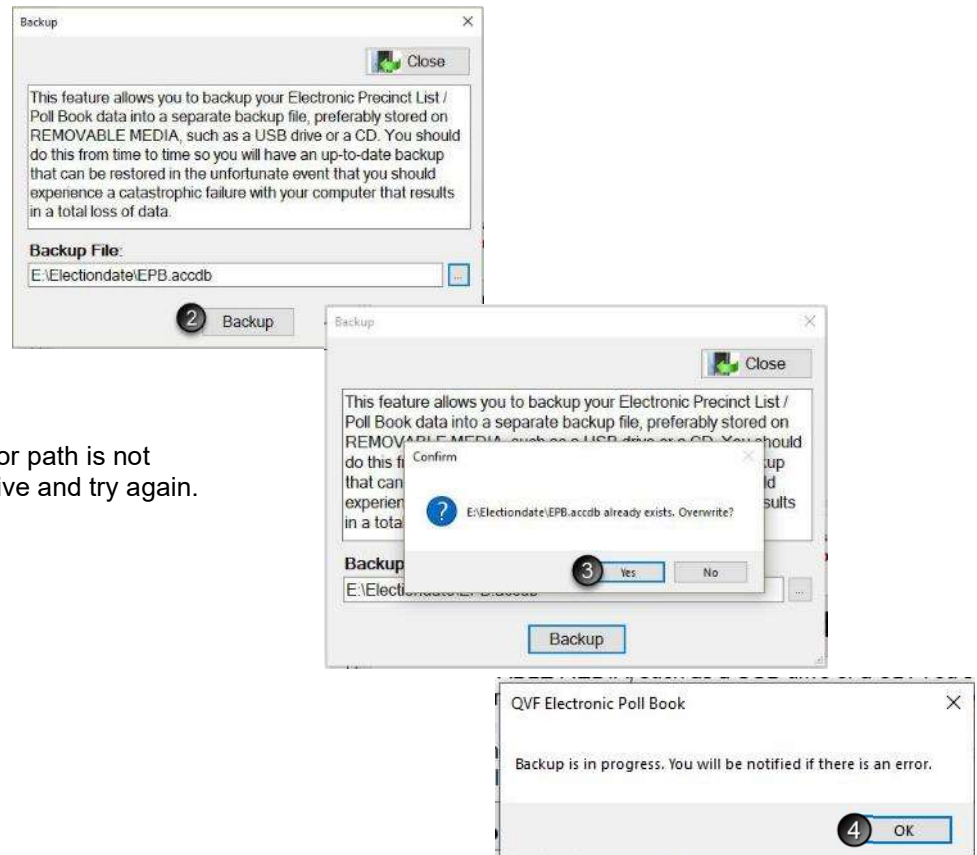
Save and Print Reports

Save and print Ballot Summary Report

The **Ballot Summary** documents the total number of ballots assigned to the precinct and how each ballot was used. You already recorded spoiled or defective (F), rejected (G) and Provisional "envelope" (I) ballots and the software enters those numbers. The designated inspector enters the remaining numbers, and the EPB software will calculate and balance the **Ballot Summary.** Type in numbers carefully and use the Tab key to move between fields.

To complete the Ballot Summary:
1. Click Reports
2. Click Ballot Summary
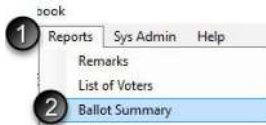
Enter the Number of ballots delivered to the precinct for each ballot style:

3. (A) Enter the Starting number and the Ending number of the first ballot style. If using more than one ballot style or if any VAT ballots were used, tab to create a new line and repeat the process until all styles are listed. The Count will be calculated automatically.

4. (B) Enter the Number of AV return envelopes received by board, if absentee ballots are being processed in the precinct. If absentee ballots are not being processed in the precinct, this box will already be completed with a 0.

Enter the Number of ballots at close of polls:

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

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

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

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

Ballot Summary Report Close

NUMBER OF BALLOTS DELIVERED TO PRECINCT:
A: Number of unvoted ballots delivered to precinct:

Style	Starting No.	Ending No.	Count
1A	00001001	00001100	100
1B	00000001	00000100	100
VAT	00090001	00090100	100

Delete Total = 300

B: Number of AV return envelopes received by board   1

C: Total   301

NUMBER OF BALLOTS AT CLOSE OF POLLS:

D: Number of ballots tabulated (Enter Tabulator Public Counter reading)   9

E: Number of AV ballot envelopes delivered to precinct which did not contain a ballot or were not processed   0

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

G: Number of ballots rejected   1

H: Number of ballots used by election inspectors for ballot duplication   0

I: Number of provisional envelope ballots issued   0

J: Number of UNUSED BALLOTS:

Style	Starting No.	Ending No.	Count
1A	00001001	00001100	100
1B	00000012	00000100	89
VAT	00090002	00090100	99

Delete Preview

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

L. Difference   0

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9. Click **Preview**

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

At this point, the **Ballot Summary** must be saved to the encrypted flash drive. If your precinct has the ability to print, the **Ballot Summary** should be printed as well. Otherwise, the reports will be printed at the Receiving Board.

To save the **Ballot Summary:**

1. Click the disk icon and PDF

2. Double click the [ElectionDate] folder in the encrypted flash drive (Removable Disk E:). Drive letters may vary.

3. Click Save

After the **Ballot Summary** has been saved, print the report (if applicable), close out of the preview screen, and close the Ballot Summary screen as well.

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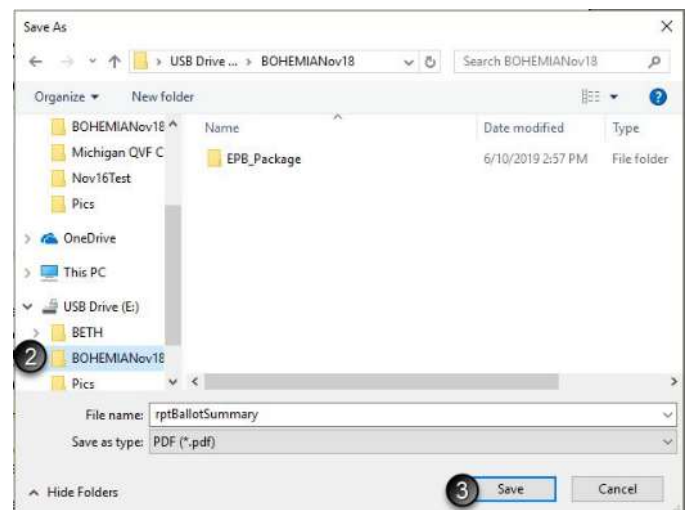
Save and Print List of Voters Report

To save the List of Voters:

1. Click Reports
2. Click List of Voters
3. Click the disk icon and PDF
4. The [ElectionDate] folder selected for the Ballot Summary should automatically pop up. Always check to make sure you are in the encrypted flash drive and the correct folder before clicking Save

After the **List of Voters** has been saved, print the report (if printing in the precinct) and close out of the preview screen.

11/06/2018 - STATE GENERAL - BOHEMIA TOWNSHIP
PRECINCT 00001

LIST OF VOTERS

#	Voter Name	Ballots	Remarks
1	MCQVF, LISA ANNE	00000001	Spoiled
		00000003	
2	MCQVF, LISA LEE	00000002	Challenged
3	MCQVF, JOHN DOE	00000004	
4	MCQVF, RALEIGH GRANT	00000106	Absentee Ballot
5	MCQVF, RANDELL REGAN	00090001	
6	MCQVF, RANA RASHID	00000005	
7	MCQVF, RAFAEL REYNALD	00000006	
8	MCQVF, RAYMOND RAY	00000007	Rejected
9	MCQVF, RASHEDA RAYE	00000008	
10	MCQVF, RANSOM RITTER	00000011	

Save and Print Remarks Report

Remarks recorded in the EPB software using the General Remarks and/or Voter Remarks are saved in a report also and must be saved to the encrypted flash drive. If your precinct has the ability to print, the **Remarks** should be printed as well.

To save the Remarks report:
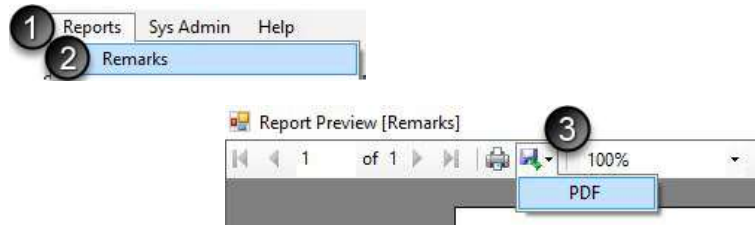
1. Click Reports

2. Click Remarks

3. Click the disk icon and PDF

4. The [ElectionDate] folder selected for the last two reports should automatically pop up. Always check to make sure you are in the encrypted flash drive and the correct folder before clicking Save

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

REMARKS

Date / Time	User	Voter #	Voter Name	Remarks
6/11/2019 10:30:12 PM	JOHNSMITH	8	MCQVF, RAYMOND RAY	ballot rejected because voter failed to tabulate ballot
6/11/2019 10:25:45 PM	JOHNSMITH			Compared tabulator and list of voters; we still balance!

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

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Save Voter History: Redirection Action Required!

After all other reports are saved, save the voter history to the flash drive. The clerk needs to use this file to update the voter registration files in the Qualified Voter File (QVF) recording who voted on Election Day.

To save Voter History:

1. Click File

2. Click Save History

3. Redirect the file by clicking on the flash drive under This PC, then double-click on the **Election Date** folder. The file name should say **epb_history** with no preceding d:\

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

4. Click Save

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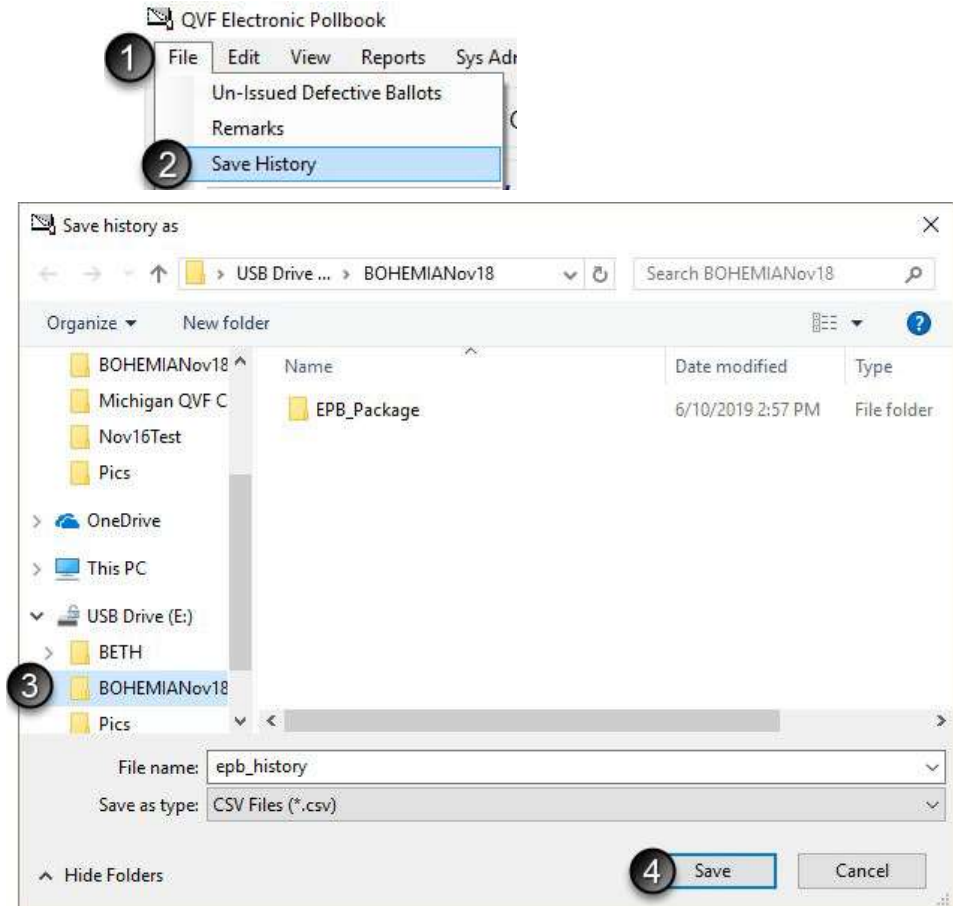
Ensure Files are on Flash Drive

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

1. Click on the file folder icon to open Windows File Explorer

2. Click Removable Disk (E:) Drive letters may vary

3. Double Click the [ElectionDate] folder
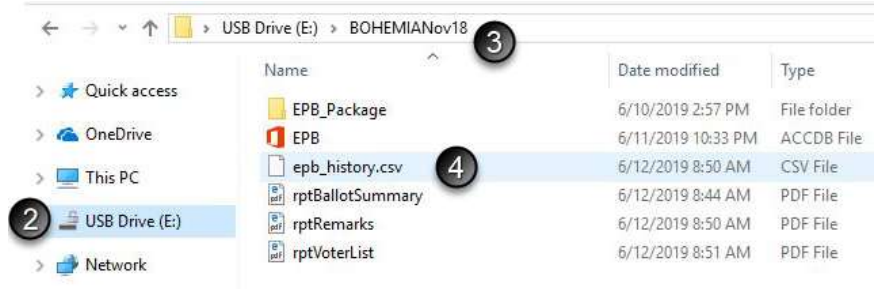
4. You must have the following files:

File Name	File Type
EPB Back Up	ACCDB file
EPB_History	CSV file
rptBallot Summary	PDF file
rptRemarks	PDF file
rptVoter List	PDF file

You may also see the following files in your folder:

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

Once all reports have been saved, close all programs and shut down the laptop. Return all items to the case except the encrypted flash drive. **The encrypted flash drive must be placed into the container the Clerk recommends, <u>sealed</u> (either an envelope with a red paper seal or an approved container and the appropriate seal), and returned to the Clerk on election night.**

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Helpful Hints

Bar Code Scanners and Absent Voter Ballots
When processing absent voter ballots in the precinct, bar code scanners may be used to scan the absentee ballot application for voter look-up. If the laptop has 4 USB ports, the bar code scanner may be used along with the magnetic card reader. If the laptop only has 3 USB ports, the bar code scanner can be used to scan the back of a driver's license, replacing the need for a magnetic card reader.

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

> **To adjust the screen resolution:**
>
> 1. Go to the desktop and right click
> 2. Click screen resolution
> 3. Select 1366x768

Additional Resources

This EPB Inspector Manual is now available in the EPB under Help.

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

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Frequently Asked Questions

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

    Answer: If using different ballot numbers for each ballot style, no action is required except to remark the situation in the **Remarks**. If your ballot styles are numbered with the same ballot number series, open the voter's record, undo the issuance of the ballot with the incorrect ballot style, and reissue a Regular Ballot with a modified number using a letter before the number (for example, X0000012) and remark the situation in the **Remarks.**

2. Is there a way to setup all election inspector usernames and passwords into the software before the EPB software is downloaded on to the encrypted flash drive?

    Answer: Yes, QVF Basic or Complete users can set up usernames and passwords in QVF.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

    Answer: Not at this time.

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

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

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Glossary

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

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

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

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

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

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

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

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

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

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

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

Privacy Zone is a term the V-Safe 100 software uses to define the encrypted area of the flash drive. This only applies to flash drives issued by the State prior to 2015.

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

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

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

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Quick Reference Checklists

Pre-Election Day – Clerk Setup

General Laptop Preparation
- ❐ Update antivirus software
- ❐ Ensure print driver software has been installed (if applicable)
- ❐ Update Windows
- ❐ Fully charge battery

EPB Software Download from QVF
- ❐ Review Election Geography
- ❐ Set up EPB inspector accounts in QVF
- ❐ Insert the encrypted flash drive into a USB port on the QVF computer
- ❐ Login to encrypted flash drive
- ❐ Create a folder on the desktop
- ❐ Log into QVF and create the EPB software
- ❐ Move EPB software to encrypted flash drive

EPB Installation on laptop
- ❐ Take encrypted flash drive to laptop and plug in to a USB port
- ❐ Log into encrypted flash drive
- ❐ Copy folder to the desktop
- ❐ Run the EPB software setup file
- ❐ Log into the EPB software and select the precinct
- ❐ Set Options
- ❐ Setup Users

Election Day – Election Inspector Setup

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

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

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

Electronic Pollbook Manual WIN10
Provided by the Michigan Bureau of Elections
Updated as of 04.22.2022

Post Close of Polls

Receiving Board
- ❒ Print Ballot Summary
- ❒ Print List of Voters
- ❒ Print Remarks

Clerk
- ❒ Upload Voter History *within* 7 days of the election (upload voter history and verify paper EPB records have been printed and retained before deleting EPB files)

- ❒ Uninstall the EPB software from the laptop 7 days *after* the canvas of the election
- ❒ Delete the [ElectionDate] folder from the encrypted flash drive 7 days *after* the canvas of the election
- ❒ Delete the [ElectionDate] folder from the QVF desktop 7 days *after* the canvas of the election (if applicable)
- ❒ Delete any other EPB file(s) that may have been saved
- ❒ Properly store the laptop and associated battery

Maintenance
- ❒ Calendar and update antivirus software
- ❒ Calendar and update Windows updates