This document provides procedures for the testing and operation of the ExpressVote universal voting device from Election Systems and Software (ES&S) in Idaho. The ExpressVote is a ballot marking device and no votes are tabulated or stored in the device.
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**Clerk's Resource Website:**  
- ES&S Customer Service Contacts  
- ES&S Pre-Election Day Checklist  
- ES&S Election Day Checklist  
- ExpressVote Operator’s Guide  
- ExpressVote Maintenance Manual  
- ExpressPass Operator’s Guide
Summary

The Election Systems and Software ExpressVote

The ExpressVote is a universal vote capture device designed for all voters, with independent voter-verifiable paper record that is digitally scanned for tabulation. This system combines paper-based voting with touch screen technology. The ExpressVote includes a mandatory vote summary screen that requires voters to confirm or revise selections prior to printing the summary of ballot selections using the internal thermal printer.

Once printed, ES&S ballot scanners, DS200 and DS850, process the vote summary card. The ExpressVote ballots are created with the EVS5200 ElectionWare software. Tabulators must also use the EVS5200 software and current firmware.

The ExpressVote must be setup and available for use at each polling place, in person absentee ballot voting location and early voting sites for all Federal elections as required by law.
All units should be maintained as recommended by the vendor to ensure they function properly at the polls on Election Day.

The ExpressVote is an accessible ballot marking device and no votes are stored or tabulated in the machine. The ExpressVote can serve all voters, including those voters with special needs. The ExpressVote’s audio ballot capability, zoom and contrast options, and accessible vote selection options provide assistance to voters who are visually impaired or blind or have difficulty reading or marking a ballot.

Although the ExpressVote is designed to be used by individuals with disabilities, anyone may use the ExpressVote.

**Documentation**

Record and retain serial numbers for each unit. Follow County inventory procedures. Tag all units with a County inventory tag.

Keep an inventory and maintenance log. Notify the state with any changes in inventory due to replacement, sale or disposition of ExpressVote units.

Before each election, check and document current firmware and software versions. Below are the certified versions of ExpressVote hardware and software compatible with the DS200 and DS850 tabulators. The ExpressVote Election Definition and tabulator coding must be programmed with the ElectionWare software.

The currently certified versions of the ExpressVote Hardware and ElectionWare software are:

**Hardware:**
- ExpressVote (Universal Voting Device) v.1.4.0.0
- DS200 (Precinct Count Tabulator) v.2.12.0.0
- DS850 (Central Count Tabulator) v.2.10.0.0

**Software:**
- ElectionWare v.4.6.0.0
- Election Reporting Manager (ERM) v.8.11.0.0
- Event Log Service v.1.5.5.0
- Removable Media Service (RMS) v.1.4.5.0
- Vat Previewer v.1.8.1.0
- ExpressVote Previewer v.1.4.0.0

Develop a spreadsheet to track current hardware and software versions. Document any maintenance required. Be detailed in descriptions of performed maintenance. Ask questions and require a signature from vendor representatives performing maintenance or upgrades. Track performance of each unit to facilitate repair and replacement of units if necessary.
Retain ballots preparation documentation with election materials including the USB media device with Election Qualification Code (EQC code) and the current Election Definition USB device for each election for 22 months. Retain inventory numbers maintenance, performance and upgrade documentation for the life of the machines.

**County Procedural Manual**

The County should prepare detailed written procedures for the security of the ExpressVote unit, Ballots Activation Cards, Ballot Summary Cards, election codes and USB devices. The County Procedural Manual should also include all procedures necessary to deploy and operate the device.

The printed County Manual should be on file and include at the minimum:

- Acceptance Procedures
- Security
- Election Programming
- Pre-election Testing
- Transport to the Polls
- Testing at the polls
- Poll Worker Training including ballot security, accounting and machine issues
- Maintenance and Storage Procedures and Records

**Security**

The ExpressVote access codes, the Election Qualification Code (EQC) USB device, the Election Definition USB device and access keys must be secured at all times. The unit is designed to use tamper proof seals for the access doors. Seal numbers are to be documented and logged. The Activation Cards, which become live ballots after marking by the ExpressVote, are to be treated as blank ballots and securely stored and tracked as other ballots are at all times.

ExpressVote physical and system controls include:

- Side access panel – Locking door protects access to USB ports used for media insertion, as well as switches for powering the unit off and on and switching between voter and administrative functions.

- Ballot Access Doors – Lockable doors to provide access to the paper transport in the event of a jam are located on the front and side of the ExpressVote.

- Pass code protected menus – Access to test and administrative menus require the input of the proper access codes set in ElectionWare in addition to a toggle switch located behind a locked door.
USB Devices

The ExpressVote utilizes two (2) USB devices. The Election Qualification Code (EQC) USB device and the Election Definition USB device. Both these devices, sometimes referred to as thumb drives or “sticks”, are part of the ES&S security system and are unique for each election.

The Election Qualification Code (EQC) device clears the election log from the previous election, resets the public counter to zero and loads other codes set in the ElectionWare programming software. The EQC device is required only during pre-election preparation of the device and not at the polls. Keep the EQC USB device secured at the County after the ExpressVote has been cleared and initialized during pre-election preparation.

The Election Definition USB device is required during pre-election preparation and at the polls. During pre-election, insert the device to access the administrative menus and perform any maintenance necessary. The Election Definition USB must be inserted to test the ExpressVote with the actual Election Definition and Activation Cards before transport to the polls. Tamper proof seal numbers should be recorded in a log that follows the unit to the polls as seals may need to be opened and replaced by poll workers on Election Day.

Secure the access door with the key and with a seal before transport to the polls. The chief judge at the polls will break the seal and unlock the access door in order to access the unit’s mode switch. After powering the unit on and calibrating the touch screen if necessary, the chief judge will lock the access door and attach a new seal to the access door during voting hours.

Activation Cards become Ballot Summary Cards

Blank Activation Cards for the ExpressVote can be printed with election specific information for each precinct by the vendor, by the County from vendor files or by the ExpressPass printer connected to a laptop loaded with the precinct voter data files prepared by the vendor.

The “Official Ballot” stamp must be used when issuing Activation Cards. Stamp the back of the Activation Card.

Blank Activation Cards can also be inserted into the ExpressVote and a poll worker can enter the appropriate activation code on screen for each voter. However, this method is not recommended as additional poll worker training is required and security and voter privacy may become issues at the poll place.

The Activation Cards with election specific printed barcodes corresponding to the correct precinct ballot for each voter are inserted into the ExpressVote. The voter then makes their choices and has an opportunity to review their choices before casting their ballot. The ExpressVote then prints the voter’s choices on the Activation Card. Now the card
marked with the voter’s choices is called a Ballot Summary Card and can be deposited into the DS200 precinct tabulator or DS850 ballot box.

Pre-Election Testing Before Transport to the Polls

See the vendor’s ExpressVote Operator’s Guide and Pre-Election Day Checklist for detailed procedures before transport to the polls.

Battery status, touch screen calibration, on-screen ballot display and the audio ballot for the current Election Definition must be verified before transport to the polls. All voter navigation and vote selection entry methods must be checked to ensure they are working properly.

Clear the ExpressVote for the current election with the Election Qualification Code (EQC) USB device. Insert the Election Definition USB device for the current election. Ballot Summary Cards for each ballot style are used to verify that the on screen ballot display and audio ballot match the actual printed ballots for each precinct. This test assures that the Election Definition for the ExpressVote is correct and the device is marking all oval positions correctly.

Activations Cards are used for pre-election County logic and accuracy testing as well as the public demonstration test and poll worker testing at the polls. Order sufficient Activation Cards from the vendor for testing.

To develop the ExpressVote Test Deck use a “first position, second position, third position” vote pattern. This is a different pattern than the pattern used for tabulators as the ExpressVote only marks a card and does not store or tabulate votes.

Build a spreadsheet to track the vote pattern and expected results. Include all first position candidates on one card, all second position candidates on a second card, all third position candidates on a third card and so on until all possible voting positions are accounted for. Include a card for all write-in positions and one blank card.

Follow the expected results spreadsheet as a guide and vote on the ExpressVote. Use both the touch screen and the keypad to vote and print Ballot Summary Cards. Verify that all positions, including write-in positions, match the voting pattern on the spreadsheet. Verify the ExpressVote is not allowing overvotes and notifying the voter of undervotes on the review screen.

Verify the touch screen, the keypad, the contrast and zoom features, the headphones and the 2 position switch, sometimes called the rocker paddle, are all working properly. The sip and puff device is typically supplied by the voter when utilized.
To complete an “end to end” test of the ExpressVote ballots, run the ExpressVote Ballot Summary Cards in a combined test with the County Test Deck ballots through the tabulator(s) as part of the County logic and accuracy test.

Combine the expected results of the complete County Test Deck of all precincts and the ExpressVote Test Deck and confirm the tabulator reports match the combined expected results. Transfer the results to the Election Reporting Manager (ERM) software and confirm the results reports match the combined expected results. Transfer the report to the County’s website and test the election night reporting procedure and public display.

Test at the Polls on Election Day

See the vendor’s Election Day Checklist for detailed procedures at the polls.

All ExpressVote units must be set up and functioning at the polls as required by the Help America Vote Act (HAVA) for Federal elections. This requirement includes early voting sites.

Transport to the polls may affect the performance of the ExpressVote. Election workers will test units before the polls open to ensure the units are working properly. Develop a plan for screen calibration, navigation, vote selection on screen and with the keypad, audio ballot testing and print testing at the polls.

Screen calibration can be accomplished from the start-up screen when the unit is initially powered up. However, if the unit is not accurately responding to touch screen inputs and is greatly out of calibration, the Chief Judge should be familiar with the “Official Mode” on the mode option switch inside the locked panel, access the Maintenance Screen and follow the detailed screen calibration procedure. This may require breaking the seal, logging the number and re-sealing the access door when the calibration procedure is complete.

The same “first position, second position” voting pattern developed for the logic and accuracy testing above should be followed to enter and vote all possible positions and confirm that the ExpressVote is marking and printing accurately at the polls. Activation Cards for this test should be included in the poll place supplies, and the Ballot Summary Cards from this print test returned to the County and clearly labeled “Test Cards”.

If the unit does not operate properly for any reason, the Chief Judge should call the County for assistance with trouble shooting. If the unit cannot be repaired by the poll workers, the unit should be left set up and labeled “Temporarily Out of Service” until a representative from the County or the vendor can repair or replace the unit.

Instruct poll workers to document any machine issues that may arise on Election Day with the ExpressVote. Documentation is essential to ensure equipment performance
issues are properly resolved with the vendor and to identify future training issues for the poll workers.

A poll book with a column for traditional ballots and a column for ExpressVote Ballot Summary cards is recommended to track the number of traditional ballots and the number of ExpressVote Ballot Summary cards issued during the day.

Closing the Polls

Follow the procedures for Closing the Polls for County Ballot Type

- Oval Ballot Central Count Procedural Manual
- Paper Ballot Procedural Manual

When the polls close the chief judge should unlock the access door and turn the ExpressVote power switch to the “OFF” position. As there are no votes stored in the machine, the Election Definition USB device can remain in the ExpressVote or be removed and returned to the County in the manner prescribed by the County Clerk.

Ballot accounting procedures are not changed. All ballots, including the ExpressVote Ballot Summary Cards and unused Ballot Activation Cards must be accounted for on the poll book cover. Follow the procedures in Oval Ballot/Precinct Count/DS200 or DS850 procedural manuals.

Ballot Summary Cards from the ExpressVote with a valid write-in are marked with a red circle for tabulation at the county. Counties will sort Ballot Summary Cards and count write-in ballots following the directions of the County Clerk and the Guidelines for Counting Paper Ballots and Tallying Procedure starting on page 69 of the Paper Ballot Procedural Manual.

Poll Worker Training

The ExpressVote is a ballot marking device and no votes are stored or tabulated in the machine. Election workers must understand and be able to explain the device and how it operates to voters. Poll workers should be able to demonstrate how to vote on the ExpressVote, how to use the zoom and contrast features and the audio ballot option. In addition, poll workers should assure voters that although the Ballot Summary Cards are a different size than the traditional ballot, all ballots are tabulated in the same manner.
Removing a Card from the Paper Path

Poll workers should also be prepared in the event of a paper jam. Follow the vendor’s detailed instructions on page 86 of the ExpressVote Operator’s Guide. Re-seal and log seal numbers after clearing the paper path of any opened access doors.

Take the following steps to remove a card regardless of where the voter is in the voting process:

1. Set the mode switch from Voter to Official.
2. On the ExpressVote Main Menu, tap Eject Card.
3. If the card does not eject after tapping Eject Card a couple times, set the power switch to OFF before manually clearing the misfeed or jam and do one or both of the following procedures:
   • Open the front access door of the paper-path compartment and remove the card.
   • Open the right-side access door of the paper-path compartment and remove the card. If you cannot easily remove the card, contact ES&S Technical Support.
4. Follow the procedures described under Clear Jam to reset the SPE firmware paper position counter and jam status.
5. Close the doors and reinsert the card if it has not been damaged, folded, or marked and continue to vote.

Storage and Maintenance

The County should store and maintain the ExpressVote as recommended by the manufacturer in the ES&S Maintenance Guide. Keep a record of all procedures performed by the vendor and have the technician signoff. Track any firmware or software updates and the performance of each machine. In the event a machine has numerous issues, documentation will be essential for repair or replacement.

All procedural manuals, vendor guides and check lists are available on the Clerk’s Resource Website.