



## v9.1.2.0 iVotronic™ Voting System Poll Worker Activated

### Operations Checklist

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#### **STARTING AN ELECTION**

This process is done to start a new election for the iVotronic Voting System. If the jurisdiction is NOT coding their election, these steps (obtaining an EQC code, and qualifying PEBs) are performed by ES&S.

#### **Set Up (using a Red Supervisor terminal)**

1. Plug the AC adapter into the back of the Red Supervisor terminal and a power outlet.
2. **While holding down the VOTE button, insert the PEB** in the upper left slot.
3. **Select Election Administration>>** on the Terminal Menu.
4. **Enter the default password** OR your jurisdiction's custom password, and **press OK**.

NOTE: A custom password might be used if the Supervisor terminal had been initialized with an Initialization PEB or a Clear and Test PEB containing custom passwords.

5. The Election Administration menu will be displayed. Check the Terminal Serial Number (SN) on the bottom of the screen. It has to match the SN label on the iVotronic.
6. **DO NOT REMOVE THE PEB** – just look at it to check the PEB SN shown on the screen. It must match the SN listed on the back of the inserted PEB.
7. Check the Software Version to see that it is the correct one that has been certified for your state.

The Software Version displayed contains the firmware version number with a create date and time, for example:

**“Software Version 9.1.2.0 Created 08/04/05 11:20”**

If any of the information in Steps 5-7 is not correct, contact ES&S.

The following steps must be done in the order they are shown:

### **Obtaining Qualification Code**

STEPS 8-13 ARE ONLY DONE ONCE TO START A NEW ELECTION.

- 8. At the Election Administration Menu, **select Start Election Qualification Trail.**
- 9. **Enter the default password** OR your jurisdiction's custom password, and **press OK.**  
  
NOTE: A custom password might be used if the Supervisor terminal had been initialized with an Initialization PEB or a Clear and Test PEB containing custom passwords).
- 10. The screen will go through several steps. When finished, the screen will display "Terminal Qualified. Election Qualification Code = \_\_\_\_\_" (a four-digit code will be shown here). **WRITE THIS CODE DOWN.**
- 11. **DO NOT REMOVE THE PEB.** Write this code on a label and attach it to the front of the PEB that is in the terminal.
- 12. **Press the screen to continue.**
- 13. If you will be continuing on to Qualify PEBs, proceed to step 14 in this checklist. Otherwise, at the Election Administration Menu choose **Exit Menu**, then at the Terminal Menu, **remove the PEB** and **press the VOTE button** to power down.

REMEMBER, PERFORM STEPS 8-13 ONLY ONCE FOR A NEW ELECTION.

### **Qualifying a PEB(s)**

NEVER QUALIFY A PEB THAT HAS ALREADY BEEN LOADED WITH YOUR CURRENT BALLOT. The following steps are done to clear any information from PAST elections and to establish the new EQC code. A Red supervisor terminal must be used.

- 14. If you are not already at the Election Administration menu, follow steps 2 – 4 in this checklist. At the Election Administration menu, **select PEB Services.**
- 15. At the PEB Services menu, **select Qualify PEB(s).**
- 16. The screen displays "PEB Qualification. Insert PEB and Press VOTE button to qualify or Press Screen to return to the Menu". **Press the VOTE button.**
- 17. The screen will display "PEB Qualification Test."
- 18. The terminal will chirp and display "Writing Test Clocks to the PEB. Wait... Reading Test Blocks from the PEB, Writing the Qualification Code to the PEB, PEB Qualified. Election Qualification code = XXXX. Press Screen to continue... PEB Voltage: XXXX PEB Battery OK."

- 19. **Press the screen** to continue.
- 20. **Insert another PEB.** Continue with steps 15-19 until all PEBs are qualified.
- 21. At this point label all PEBs, and determine which one(s) will be the Master for each polling location.
- 22. When all PEBs are qualified, **press the screen** to return to the Menu.
- 23. **Take out the last PEB, and press the illuminated VOTE button** to power down.

NOTE: These PEBs are now ready to be loaded with the ballot for the current election. This is done at a PC that is running UNITY Hardware Programming Manager. We do not show this in this class – that is shown in a UNITY Software class.

SET ASIDE THE RED SUPERVISOR TERMINAL.

## **CLEARING AND TESTING VOTER TERMINALS**

### ***Manual procedures for Clear and Test***

USING THE BLUE VOTER TERMINALS, **Clear and Test these terminals** using the PEB that was qualified at the Red Supervisor terminal and has been loaded with the current ballot. Doing this erases votes and audit data that may be in the terminal from the last election and loads the EQC and any custom passwords that may have been established for the new election.

- 24. **While pressing the VOTE button, insert the PEB.** After a few, short rapid beeps, **let go of VOTE button.** The Terminal Menu will be displayed.
- 25. **Select the Setup & Configuration>>** option.
- 26. **Enter the Service Menu default password OR your jurisdiction’s custom password and press OK.**

NOTE: A custom password might be used if the terminal had been initialized with an Initialization PEB or a Clear and Test PEB containing custom passwords, or if the terminal contains custom password from the previous election.

- 27. At the Service Menu, **select Clear and Test Terminal.**

NOTE: If the Clear and Test Terminal menu option is blackened out and has N/A listed next to it, proceed to Scenario #4, step 34 in this checklist. Depending upon the circumstance that the terminal has been left, there are 4 possible scenarios that you may encounter when Clearing and Testing a terminal. The possible scenarios are detailed below. Follow the appropriate scenario based upon what you see displayed on the screen.

28. **Scenario #1:** If the terminal has been previously Cleared and Tested and has not been opened for voting since, the screen displays, “iVotronic Terminal Qualification Tests, TERMINAL WILL BE CLEARED! Press the VOTE button to clear, Press screen to return to the Menu.”

Actions to be taken:

- **Press VOTE button**
- Skip to step 37

29. **Scenario #2:** If the terminal has been opened for voting and properly closed, the screen displays: “Terminal may contain vote image data. Public Count is XXX. The terminal is closed. Are you sure you want to Clear and Test? Press screen to continue.”

Actions to be taken:

- **Press the screen**

30. At the Clear and Test Password screen, **enter the default password** OR your jurisdiction’s custom password and **press OK**.

NOTE: Custom passwords may have been established for the election currently loaded on this terminal.

31. The screen displays: “iVotronic Terminal Qualification Tests, TERMINAL WILL BE CLEARED! Press the VOTE button to clear, Press screen to return to Service Menu.”

Actions to be taken:

- **Press the VOTE button**
- Skip to step 37

32. **Scenario #3:** If the terminal has been opened for voting, no votes have been cast, and has not been closed, the screen will display: “Please Enter Override Password.”

Actions to be taken:

- **Enter the default Override password** OR your jurisdiction’s custom password and **press OK**.

NOTE: Custom passwords may have been established for the election currently loaded on this terminal.

33. The screen displays: “This terminal does not contain vote image data. Public Count is 0. The terminal is open and ready for voting. Are you sure you want to Clear and Test? Press screen to continue.”

- **Press the screen**

34. At the Clear and Test Password screen, **enter the default password** OR your jurisdiction’s custom password and **press OK**.

NOTE: Custom passwords may have been established for the election currently loaded on this terminal.

35. The screen displays: “iVotronic Terminal Qualification Tests, TERMINAL WILL BE CLEARED! Press the VOTE button to clear, Press screen to return to Service Menu.”  
Actions to be taken:

- **Press the VOTE button**
- Continue to step 37

36. **Scenario #4:** If the terminal has been opened for voting, votes have been cast, and the terminal has not been closed, the Clear and Test menu option will be disabled. (“N/A” appears next to the menu option.) The terminal cannot be Cleared and Tested from this menu option. The terminal must either be closed first, collecting the votes or an Initialization PEB must be used, closing the terminal without collecting votes. Then the terminal may be Cleared and Tested manually or with a Clear and Test PEB.

- If you wish to close the terminal and collect the votes, refer to the “Closing the Polls” section of your Poll Worker’s checklist.
- If you wish to go ahead with a Clear and Test without collecting votes, Refer to the section that follows on preparing and using an Initialization PEB. (Step 37)  
(Scenario #4 complete)

(Continued from scenarios #1 – #3)

37. The screen displays, “Testing and Clearing Memory Storage Areas”. Four steps will then be displayed, “Erasing, Writing, Reading, Erasing Again, PASS”. When finished, the terminal will show an Election Qualification Code (EQC), which is a four digit alphanumeric pattern that is written from the PEB to the terminal. Check to see that this EQC is the same one that is on the front label of the PEB without removing the PEB. If it does not match, call ES&S. If screen does not display “PASS” as the last step in this process, but shows “Fail”, contact ES&S.

38. **Press screen to continue.** You will be returned to the Setup and Configuration Menu. You may then **remove the PEB** and **press the VOTE button** to power down.

### **Re-set Terminal Passwords using a Initialization PEB**

Use an initialization PEB to return a terminal to a known state if the current passwords and EQC code are not known, or to close an open terminal containing votes and prepare it for a Clear and Test. An EQC code is not written to the terminal in this process. A Clear and Test should be done afterwards to establish the desired EQC code.

Note: Closing a terminal with an Initialization PEB does not collect votes.

### **To prepare an initialization PEB**

- 39. **While pressing the VOTE button, insert the PEB** you wish to use as an initialization PEB into a RED Supervisor Terminal and access the Terminal Menu.
- 40. Press the **Election Administration** option. **Enter the default password** OR your jurisdiction's custom password and **press OK**.  
  
NOTE: A custom password might be used if the Supervisor terminal had been initialized with an Initialization PEB or a Clear and Test PEB containing custom passwords.
- 41. Press the **PEB Services** option. The PEB Services menu appears.
- 42. Press **Prepare PEB for Initialization**. **Enter a password** for the Initialization PEB. This password will be required when you use the PEB.
- 43. The terminals that you plan to initialize with this PEB must be identified. **Enter the serial number(s)** that correspond to the terminals you will be using.
- 44. When all serial numbers have been entered select **Exit Menu**. The Enter New Terminal Passwords menu appears. You may retain the current passwords on the terminals (if they are known) or you may establish the "default" passwords or new passwords.
- 45. **Select a password** to change. The corresponding password screen will appear.
- 46. **Enter the new password**. Passwords must be at least 6 characters, but not to exceed 8 characters in length. **Press OK** to return to the Enter New Terminal Passwords menu. The new password will now appear beside the selection.
- 47. Repeat steps 43 and 44 to change more passwords.
- 48. Select **Exit Menu** when finished changing passwords. The following screen will appear:

**The Initialization PEB is ready for use. Be sure to remember the password.**

**Prepare Another PEB**

**Return to Menu**

**Remove the PEB to Power Down the Terminal.**

- 49. **Follow the on-screen instructions** to continue. When done, **remove the PEB** and **press the VOTE button** to power down.

**Using an initialization PEB**

- 50. **Insert the formatted Initialization PEB** into one of the designated terminals. The Initialization Password screen appears. **Enter the password** that was established at the time the PEB was prepared. The following screen appears:

### **iVotronic Terminal Initialization**

Press the VOTE button to start the Initialization Process.

Press the touch screen to EXIT the Initialization Process.

Following the Initialization Process the iVotronic Terminal will contain the following Passwords:

DAM Password:	xxxxxx
Service Menu Password:	xxxxxx
Election Central Menu Password:	xxxxxx
Clear and Test Password	xxxxxx
Override Password:	xxxxxx
Lock Unlock Password:	xxxxxx
Upload Firmware Password:	xxxxxx
Qualification Code Password:	xxxxxx

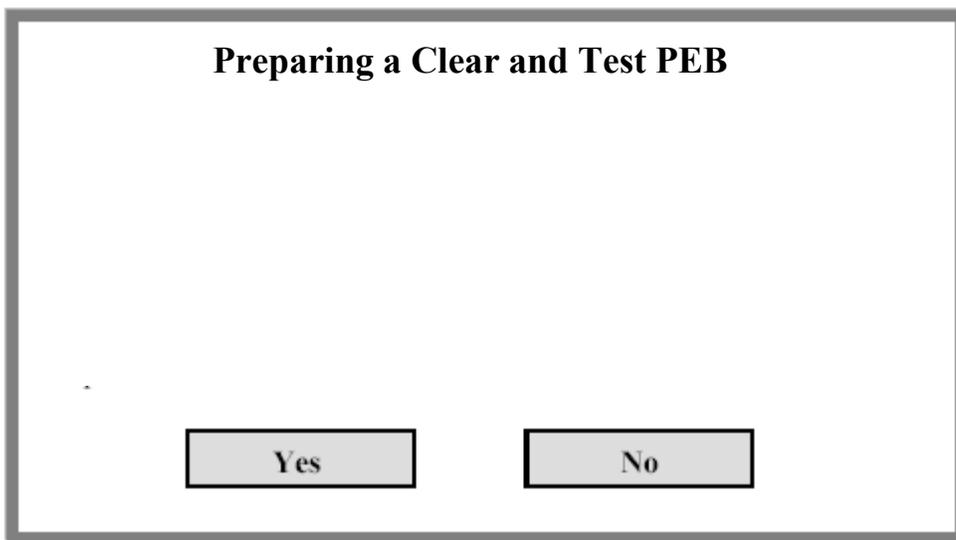
- 51. **Press the VOTE button** to begin the initialization process.
- 52. When the initialization process is finished you will be prompted to **remove the PEB**. The terminal will then shut down.
- 53. **Bring the terminal back up and Clear and Test the terminal with a PEB** containing the desired EQC code. Refer to Clear and Test procedures in this checklist.

### **Clear and Test a Terminal using a Clear and Test PEB**

Use a Clear and Test PEB to Clear and Test a large number of terminals. A Clear and Test PEB allows you to bypass the Setup & Configuration password screen. This PEB also allows you to establish custom passwords. This PEB must be prepared on a RED Supervisor terminal.

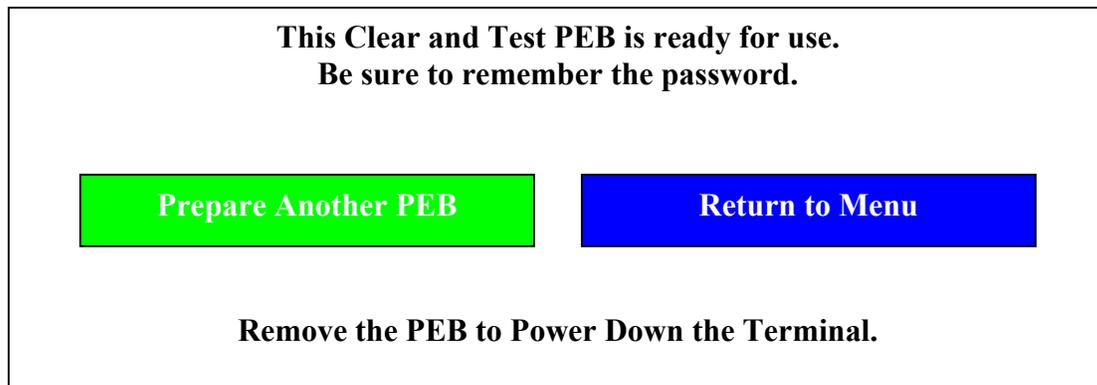
### **To prepare a Clear and Test PEB**

- 54. **While pressing the VOTE button, insert a supervisor PEB** that has been qualified for the current election into a RED Supervisor terminal. At the Terminal menu, select the **Election Administration** option. **Enter the default password OR** your jurisdiction's custom password and **press OK**.  
NOTE: A custom password might be used if the Supervisor terminal had been initialized with an Initialization PEB or a Clear and Test PEB containing custom passwords.
- 55. **Select the PEB Services** option.
- 56. **Press Prepare PEB for Clear and Test**. The Preparing a Clear and Test PEB screen appears.



- 57. **Press Yes**. A password information screen appears indicating that the password entered on the following screen must be the same as the Clear and Test password on the terminals that you plan to Clear and Test.
- 58. **Press Yes** to proceed. The Clear and Test password screen is displayed
- 59. **Enter the password** that the terminal(s) require to accomplish the Clear and Test, and **press OK**. This password will be required when you use the PEB to Clear and Test terminals.
- 60. The Enter New Terminal Passwords menu appears. You may retain the current passwords on the terminals (if they are known) or you may establish default or new passwords.

- 61. **Select a password** to change. The corresponding password screen will appear.
- 62. **Enter the new password.** Passwords must be at least 6 characters, but not to exceed 8 characters in length. **Press OK** to return to the Enter New Terminal Passwords menu. The new password will now appear beside the selection.
- 63. Repeat steps 59 and 60 to change more passwords.
- 64. **Select Exit Menu** when finished changing passwords. The following screen will appear:

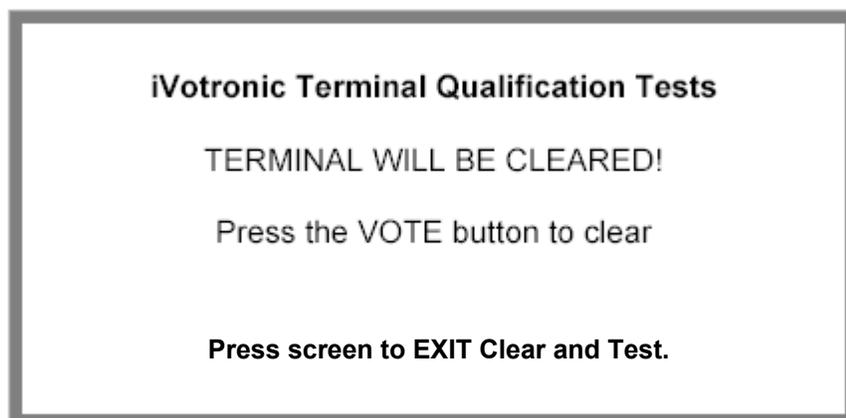


- 65. **Press Prepare Another PEB** to make additional Clear and Test PEBs. **Press Return to Menu** to return to the PEB Services menu, **or remove the PEB** and power down.

**To Clear and Test with a prepared PEB**

- 66. **Insert the Clear and Test PEB** into the terminal that you want to clear. The clear and test password screen appears.
- 67. **Enter the Clear and Test password** for this PEB and **press OK**. The verification screen appears after you enter the correct password.

**Clear and Test Verification Screen**

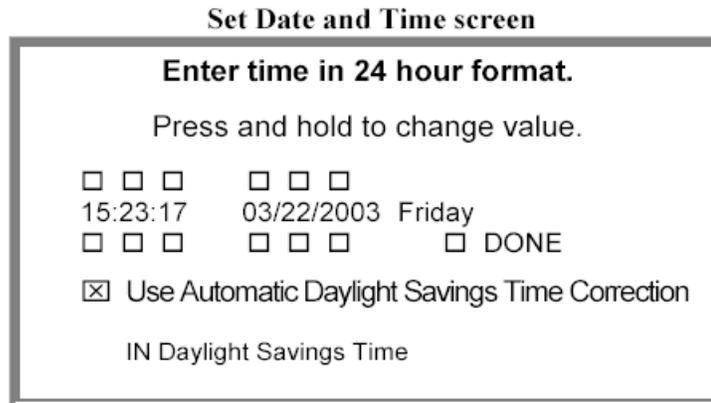


- 68. **Press the VOTE button.** The message “You may remove PEB. Terminal Clear and Test has started.” appears. **Remove the PEB.**
- 69. The screen will display the following messages: “Testing and Clearing Memory Storage Areas. Erasing, Writing, Reading, Erasing Again, PASS.” The message “Terminal Clear and Test Successful” appears when the process is complete. **Press OK** to power down the terminal.

**Setting the Date and Time (on the blue terminals).**

REMEMBER this is the current time and date, not the opening or closing time of your election.

- 70. **Press the VOTE button while inserting a PEB.** The Terminal Menu is displayed.
- 71. **Select the Setup and Configuration option. Enter the Service Menu default password OR your jurisdiction’s custom password, and press OK.**
- 72. **Select the Configure Terminal>> option.**
- 73. At the Configure Terminal menu, **select the SET TIME AND DATE option.**



- 74. At this screen, check to see that the current date and time are displayed. **Use the boxes above and below to set the date and time.** Remember to enter in military time or 24-hour time.
- 75. If your jurisdiction adheres to Daylight Savings Time, make sure to **select the Use Automatic Daylight Savings Time Correction In Daylight Savings Time box. Press Done.**
- 76. **Continue to set up the terminal** in the Configure Terminal menu, **or remove the PEB and press the VOTE button** to power down the terminal.

### **Set Vote Button Configuration**

- 77. **Access the Configure Terminal** menu as detailed in steps 70 - 72.
- 78. At the Configure Terminal menu, **select Set Vote Button Configuration.**
- 79. **Select the option you want to hear** when the VOTE button is activated. There are 4 pre-programmed configurations that may be selected, each with different tone On/Off times. Also, there is the availability of creating a configuration of your choice by selecting "User Configuration". If this is selected you will be prompted to enter On and Off times (measured in milliseconds). At each prompt, enter your desire time in milliseconds and press OK.
- 80. **Select Number of Repeats**, and **enter a number** (up to 10).
- 81. You can listen to the selection by **pressing Test.**
- 82. When satisfied, **press Exit.** You will be returned to the Configure Terminal menu. **Continue to set up the terminal** in the Configure Terminal menu, **or remove the PEB, and press the VOTE button** to power down the terminal.

### **Selecting Progress Bars**

The progress bars show the status of iVotronic operations during poll opening, poll closing and other file transfer operations.

- 83. **Access the Configure Terminal menu** as detailed in steps 70 - 72.
- 84. **Press Enable Progress Bar.** The Enable Progress Bars screen appears.
- 85. **Press Enable Bars** to activate receipt printing. A red X appears in the box when you have enabled the progress bars.
- 86. **Press Done.** **Continue to set up the terminal** in the Configure Terminal menu, **or remove the PEB and press the VOTE button** to power down the terminal.

Note: Using Progress Bars may have the effect of slowing down the poll opening and closing process on very large elections where many precincts are used on one terminal.

### **Enabling the Zoom Selection Screen**

The zoom feature is always disabled in version 9.1.2.0, as it is not currently supported in bitmap elections.

### **Preparing an ADA-equipped iVotronic Terminal for the ADA voter**

ADA equipped iVotronic terminals are used by both ADA and non-ADA voters. A compact flash card must be inserted into the ADA terminal that contains the appropriate .wav files before the terminal is powered up. If a flash card is not present or inserted into the terminal, the ADA terminal cannot operate in the voice mode.

### **Enabling Audio Ballot**

The audio ballot must be enabled on the ADA terminals before they can be used in this mode.

- 87. **Access the Configure Terminal menu** as detailed in steps 70 - 72.
- 88. At the Configure Terminal menu, **select Enable Audio Ballot** option.
- 89. At the Enable Audio Ballot on Terminal screen, **press the Enable Audio Ballot box**. A red "X" will appear in the box.
- 90. **Press OK** to enable the audio ballot. The Configure Terminal menu screen appears with the message, "Audio Ballot Enabled" in the system information at the bottom of the screen.
- 91. **Continue to set up the terminal** in the Configure Terminal menu, **or remove the PEB and press the VOTE button** to power down the terminal.

### **Setting Volume**

This option will be disabled (highlighted and marked with N/A) unless the Audio ballot has been enabled and a flash card with .wav files is installed.

- 92. **Access the Configure Terminal menu** as detailed in steps 70 - 72.
- 93. **Select Set Volume**.
- 94. Make sure the volume is set at least at 250 or greater. To test the setting, **plug a headset into the ADA terminal, and press the TEST button**.

NOTE: For headphones with an inline volume control, set the volume to the maximum so voters may adjust the volume to their own comfort level.

- 95. When satisfied with the volume, **press EXIT**. **Continue to set up the terminal** in the Configure Terminal menu, **or remove the PEB and press the VOTE button** to power down the terminal.

### **Set Screen Backlight Timeout**

For use only when external power supplied, set the backlight timeout for the number of minutes you want the Welcome screen (Splash Screen) to display before the terminal automatically powers down.

- 96. **Access the Configure Terminal menu** as detailed in steps 70 – 72.
- 97. **Press Set Screen Backlight Timeout.** The Adjust Backlight Timeout screen appears:

### **Adjust Backlight Timeout**

Minutes = 3  
Seconds = 0

- Up**
- Down**
- Set Default (3 Minutes)**
- Save & Exit**

- 98. **Press Up or Down** to raise or lower the timeout interval in 30-second increments. Select from a timeout range of 30 seconds to 30 minutes. **OR press Set Default (3 minutes)** to change the timeout to three minutes.
- 99. **Press Save & Exit** to save the setting and return to the Configure Terminal menu. **Continue to set up the terminal in the Configure Terminal menu, or remove the PEB and press the VOTE button** to power down the terminal.

### **Enabling Real-Time Audit Log Printing**

- 100. **Access the Configure Terminal menu** as detailed in steps 70 – 72.
- 101. **Press Enable Real-Time Audit Log Printing.**
- 102. **Enter the default Override password** OR your jurisdiction's custom password and **press OK.**
- 103. The Enable RTAL screen appears: **Press the Done box** when finished.

Use the Enable RTAL box to Start  
Or stop Real-Time Audit Log Printing.  
Press the Done Box when Finished.

**Enable RTAL**     

**Done**

### **Setting Color Options**

- 104. **Access the Set Up and Configuration menu** as detailed in steps 24 – 25 of this checklist.
- 105. **Select Color Option Numbers** from the Set up and Configuration menu.
- 106. From the Color Chart: Number Corresponds to background Color screen, **select Number/Color and press screen to continue** and return to the Set Up and Configuration menu.

### **Testing the Printer**

Test the thermal printer in the Communications Pack before every election. Use the thermal printer on Election Day to produce zero tapes and polling place results reports.

- 107. **Access the Election Administration menu** as detailed in steps 2 - 4 of this checklist.
- 108. Attach the cable from the Communication Pack to the RS232 Connector on the back of a supervisor or voter terminal.
- 109. **Turn the Selector Switch on the Communication Pack to PRINTER and press the small black button** on the printer until the green light becomes illuminated.
- 110. **Press Diagnostics>>** option.
- 111. **Press the Test Printer** option.
- 112. **Select the type of printer** used in your communications pack.
- 113. **Press Update Printer Status option** to show if printer is active. Status will display under screen title.  
Note: Citizen Printer will always display the message, “ Citizen Printer: Manually verify. Auto Sensing not supported.”

NOTE: This test does not guarantee that the current printer batteries will support the printer throughout the entire election. To ensure battery life, replace old batteries before each election, and turn the printer off when not in use.

- 114. **Press Print Test Line.** The message “Printing test message to printer...” appears in the lower left corner of the screen. The printer will immediately line feed twice and print “Printer Test Message”.
- 115. **Press Print Linefeed** to advance one line.
- 116. **Press Exit Menu** to return to the Test Printer Selections Menu.
- 117. **Press Exit Menu** to return to the Diagnostics Menu.

- 118. **Press Exit Menu** to return to the Election Administration Menu.
- 119. **Press Exit Menu** to return to the Terminal Menu.

### **Run an Election Test**

The Logic and Accuracy Test option is only available on the Terminal Menu if the terminal has been Cleared and Tested. Operation of additional menu items not covered in this checklist, may be found in the iVotronic v9.0 Operations Manual. In addition, be sure to Clear and Test all terminals and Clear Supervisor PEB Vote Totals after any test so that the equipment is ready to use in the actual election.

There are 4 options available for testing the election.

Three automated Logic and Accuracy tests are available. Each of these tests automatically records votes for each candidate. The number of votes cast depends on the test you choose.

You can also run a manual election test by opening the terminals for voting, manually voting while keeping a tally of the votes, then closing the terminals and printing a results tape. Compare your manual tally with the results tape to verify tabulation.

### **L & A Vote for One Test**

The total number of ballots cast for this test will be one greater than the number of candidates in the largest contest on the Ballot. In other words, if the largest number of candidates in a contest is six, seven ballots will be cast. One vote is recorded for each candidate (including write-ins) and one blank ballot is cast. For contests with less than six candidates, each candidate will still get one vote, one blank ballot is cast, and the remaining votes for that contest are recorded as under-votes.

- 120. **Access the Terminal Menu** as detailed in step 2 of this checklist.
- 121. **Select the Logic and Accuracy >>** option.
- 122. **Enter the Service Menu default password OR** your jurisdiction's custom password.
- 123. **Press OK.**
- 124. **Select the L&A Vote for One Test.** A screen is displayed indicating "Touch the VOTE button to continue" or "Touch the screen to cancel this test".
- 125. **Press the VOTE button.** The terminal executes the vote for one test and when complete, the message "Logic and Accuracy Test Finished" is displayed. Press the screen to continue ..." appears.
- 126. **Press the screen** to return to the Logic and Accuracy Tests menu.

127. Verify test results and accuracy using one of the following options:

- **Select the Display L & A Vote Totals option.** Votes are collected. The screen displays “View L&A totals now?”. **Press YES.** L&A totals will be displayed. **Touch the screen** to advance from page to page in the report. When the “Report Finished” message appears, **press the screen** to return to the Logic and Accuracy Tests menu.
- **Select the Print L & A Vote Totals option.** Votes are collected. The screen displays “Print L&A totals now?”. **Press YES.** Instructions for preparing the Communications Pack will be displayed. **Follow these instructions to connect the communications pack,** and then **press the Print button.** Vote totals will print. If you want to print another report, **press YES** when the “Do you want to print another?” message appears. Otherwise **press NO,** and you will be prompted to **turn the Communication Pack off** and **press the screen** to continue. Then **press the screen** again to return to the Logic and Accuracy Tests menu.

128. Clear the test vote totals from the terminal by **selecting the Clear and Test Terminal option.** The message “TERMINAL WILL BE CLEARED! Press the VOTE button to clear. Press screen to return to Logic and Accuracy menu” is displayed.

NOTE: You will not be able to exit the Logic and Accuracy menu without clearing and testing the terminal.

129. **Press the VOTE button.** The message “**Testing and Clearing Memory Storage Areas**” appears, and the screen returns to the Service Menu when the process is complete.

130. Regardless of which option you used to view or print your L & A test election results, you must **clear those votes from the PEB.** The detailed steps of this procedure will be covered later in steps 160 -163 of this checklist.

### Automated Multi Vote Test

This test gives the first candidate one vote, the second candidate two votes, the third candidate three votes, and each successive candidate in a race one more vote. For instance, if the largest number of candidates in a contest is six, the iVotronic casts 22 ballots (1+2+3+4+5+6+ a blank ballot). The terminal records votes for each candidate including write-ins and casts one blank ballot. For contests with less than six candidates, each candidate will still get the appropriate number of votes with the remaining votes for that contest recorded as under-votes.

- 131. From the Logic and Accuracy Tests menu, **select L & A Multi Vote Test**. A message with instructions “Touch the VOTE button to continue” appears.
- 132. **Press the VOTE button**. The message “Retrieving Ballot Data. Please Wait. You will be notified at completion” appears. The terminal executes the Multi Vote test and the message “Logic and Accuracy Test Finished. Press screen to continue” appears.
- 133. **Press the screen** to return to the Logic and Accuracy Test menu.
- 134. Verify test results and accuracy using one of the following options:
  - **Select the Display L & A Vote Totals option**. Votes are collected. The screen displays “View L&A totals now?” **Press YES**. L&A totals will be displayed. **Touch the screen** to advance from page to page in the report. When the “Report Finished” message appears, **press the screen** to return to the Logic and Accuracy Tests menu.
  - **Select the Print L & A Vote Totals option**. Votes are collected. The screen displays “Print L&A totals now?” **Press YES**. Instructions for preparing the Communications Pack will be displayed. **Follow these instructions to connect the communications pack**, and then **press the Print button**. Vote totals will print. If you want to print another report, **press YES** when the “Do you want to print another?” message appears. Otherwise, **press NO** and you will be prompted to **turn the Communication Pack off** and **press the screen** to continue. Then **press the screen** again to return to the Logic and Accuracy Tests menu.
- 135. Clear the test vote totals from the terminal by **selecting the Clear and Test Terminal option**. The message “TERMINAL WILL BE CLEARED! Press the VOTE button to clear. Press screen to return to Logic and Accuracy menu” is displayed.

NOTE: You will not be able to exit the Logic and Accuracy menu without clearing and testing the terminal.
- 136. **Press the VOTE button**. The message “Testing and Clearing Memory Storage Areas” appears and the screen returns to the Service Menu when the process is complete.
- 137. Regardless of which option you used to view or print your L & A test election results, you must **clear those votes from the PEB**. The detailed steps of this procedure will be covered later in steps 160 - 163 of this checklist.

### **Vote Selected Ballot Test**

This test allows you to select the candidates that get votes and the number of ballots cast. Record your votes as you select candidates, so you can compare these numbers to the printed results.

- 138. From the Logic and Accuracy Tests menu, **select L & A Vote Selected Ballot Test**. A message with instructions “Touch the VOTE button to continue” appears.
- 139. **Press the VOTE button**. The message “Retrieving Ballot Data. Please Wait. You will be notified at completion” appears. If you are testing a bitmap ballot the message “Loading Bitmaps for Test Vote, Please Wait” appears. The Set Number of Ballots to Cast screen appears after the terminal retrieves the ballot data.

**Set Number of Ballots to Cast.**

Total =0

	Thousand	Hundred	Ten	One
Up.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dn.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Done			

Please press the appropriate box  
to set each digit of the number  
Press the Done box when finished.

- 140. **Press the Up and Down boxes** to select the number of ballots you want to cast. **Press Done** when Total equals the number of ballots you want to cast.
- 141. **Select the ballot** that you want to test from the ballot selection screen. If only one ballot is present on the PEB, the terminal will retrieve it automatically. The message “Please remove Supervisor PEB” appears.
- 142. **Remove the PEB, select a language** if necessary, and the ballot appears.
- 143. **Vote the ballot and press the flashing VOTE button** when you are finished. The message “Casting Logic and Accuracy Ballots, Ballot X” appears where X is the number of the ballot the terminal is currently processing.
- 144. **Replace the PEB** if the terminal message indicates such. “Press Screen to continue” appears. **Press the screen** to return to the Logic and Accuracy Test menu.

145. Verify test results and accuracy using one of the following options:
- **Select the Display L & A Vote Totals option.** Votes are collected. The screen displays “View L&A totals now?” **Press YES.** L&A totals will be displayed. **Touch the screen** to advance from page to page in the report. When the “Report Finished” message appears, **press the screen** to return to the Logic and Accuracy Tests menu.
  - **Select the Print L & A Vote Totals option.** Votes are collected. The screen displays “Print L&A totals now?” **Press YES.** Instructions for preparing the Communications Pack will be displayed. **Follow these instructions to connect the communications pack,** and then **press the Print button.** Vote totals will print. If you want to print another report, **press YES** when the “Do you want to print another?” message appears. Otherwise, **press NO** and you will be prompted to **turn the Communication Pack off** and **press the screen** to continue. Then **press the screen** again to be returned to the Logic and Accuracy Tests menu.
146. Clear the test vote totals from the terminal by **selecting the Clear and Test Terminal option.** The message “TERMINAL WILL BE CLEARED! Press the VOTE button to clear. Press screen to return to Logic and Accuracy menu”, is displayed
- NOTE: You will not be able to exit the Logic and Accuracy menu without clearing and testing the terminal.
147. **Press the VOTE button.** The message “Testing and Clearing Memory Storage Areas” appears and the screen returns to the Service Menu when the process is complete.
148. Regardless of which option you used to view or print your L & A test election results, you must **clear those votes from the PEB.** The detailed steps of this procedure will be covered later in steps 160 - 163 of this checklist.

### *Manual Test Vote*

149. On a BLUE voter terminal, **insert the Master PEB.**
150. **Follow the instructions on your Poll Worker Checklist to open the polls,** but it will not be necessary to print a Zero Tape.
151. When the terminal is open for voting, **insert a Supervisor PEB, vote,** and **press the VOTE button.** Do this several times, keeping a tally of your votes to check with the Totals Tape for accuracy.
152. When finished voting, you will need to close the polls by **inserting the Master PEB while pressing the VOTE button.** The Terminal Menu is displayed.
153. **Select the Election Services option. Enter the Service Menu default password OR your jurisdiction’s custom password and press OK.**

- 154. **Select Close Terminal Early.** A question will be displayed, “Do you want to close the terminal early? **Press Yes.**
- 155. When prompted, **enter the Override default password** OR your jurisdiction’s custom password and **press OK.**
- 156. Votes will be collected to the PEB, please wait. The next screen will prompt you to remove the PEB. **Remove the PEB.** If a flash card is installed, the audit data will be copied to the flash card.
- 157. When closing and data collection is complete, the screen will prompt to “Touch the screen to exit”. **Touch the screen** and the terminal will power down.  
NOTE: If more than one voter terminal was used for this test election, each voter terminal must be closed using the Master PEB.

### **Print the Results**

- 158. Take the terminal and the Master PEB and place on a hard, flat surface along with the Communications Pack. Connect the Communications Pack to the terminal.
- 159. **Insert the Master PEB** in the terminal. The terminal will display 2 print options. Regardless of how many terminals you used in this manual test, **press the box next to “Print polling location results tape now?”** Instructions for the communications pack will be displayed.
- 160. **Turn communication pack selector switch to PRINTER.**
- 161. **Press and hold the small black** button on the printer until the green light turns on.
- 162. **Press the PRINT button** on the iVotronic screen to print the Totals Tape.
- 163. When the predetermined number of tapes have printed, the screen will ask, “Do you want to print another?” Answer appropriately. When finished, **select NO.**
- 164. **Press Done** on the following screen. **Follow on-screen instructions.**
- 165. If your election is coded to transmit results via modem, **press CANCEL** on the “Modem Report” screen.
- 166. The message, “Do you want to re-collect this terminal” is displayed. **Press No.** You will be prompted to **remove the PEB.** The terminal will power down.
- 167. Verify the results tape with your manual tally.

**Clearing and Testing the Terminals after the manual test**

168. **Follow the instructions for Clearing and Testing Voter Terminals** in this checklist starting at step 24, and using scenario #2.

**Clearing Vote Results from PEB's – only those that were used to collect the votes from the terminals.**

169. USING THE RED SUPERVISOR TERMINAL, **access the Election Administration menu**, following steps 2 – 4 in this checklist. At the Election Administration menu, **select PEB Services**.
170. **Select Clear Supervisor PEB Vote Totals**. This clears out vote totals without deleting the ballot stored in the PEB.
171. “Clear ALL votes stored on this PEB?” is displayed. **Press Yes**.
172. When finished, **touch the screen** to continue. **Take out the PEB and either put in another PEB to be cleared, or press the VOTE button** to power down the terminal. Do this for all PEBs used to collect votes for the test.

# **LOCKING THE TERMINALS**

## **LOCKING THE TERMINALS FOR EARLY VOTING**

This feature is typically only used for Early Voting and is not used on Election Day terminals. It is shown in this “Operations Checklist” because the procedure involves passwords that are not typically given to poll workers.

### **On a terminal that is open for voting:**

- 173. **Press the VOTE button while inserting the PEB.** The Terminal Menu is displayed.
- 174. **Select Lock Terminal.** The Lock Terminal password screen is displayed.
- 175. **Enter the Lock/Unlock default password OR your jurisdiction’s custom password and press OK.**
- 176. The terminal will display, “Please remove PEB. Terminal Locked for Voting”. **Remove the PEB.**

### **Unlocking terminal**

- 177. **Insert the PEB** into the voting terminal. A message will appear “This terminal is locked for Voting. Touch screen to Unlock”.
- 178. **Touch the screen.** The Unlock Password screen appears.
- 179. **Enter the Lock/Unlock default password OR your jurisdiction’s custom password and press OK.**
- 180. The message “Please remove PEB. Terminal is now open for Voting” is displayed.

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## **ELECTION DAY – POLL WORKER’S CHECKLIST**

**Go to the Poll Worker’s Checklist for setting up the voting booths, opening polls, voting, closing polls, and modeming vote totals before going to the next section below. When finished with the Poll Worker checklist, come back here and follow the steps in the Post Election Reporting.**

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# **POST ELECTION**

## **Post Election Reporting**

If a Flash Card is present in a terminal at Poll Closing, the Audit Data is automatically collected. If the jurisdiction wants to retrieve the audit trail from each of their blue voter terminals at some point after the election, one of these options can be used: A) load to a compact flash, or B) Upload to a PC. Follow either A or B.

### **A-(1). Preparing and Using a PEB for Compact Flash Audit**

This procedure allows a PEB from the polling location to be prepared to automate the process of collecting the Audit data to a compact flash card.

NOTE: Once a PEB has been prepared in this manner, it can no longer be used to initialize a ballot for this election.

- 181. **Use a Supervisor PEB without vote totals on it to activate the Terminal Menu** on a Supervisor terminal. **Press the Election Administration menu and enter the password** when the password screen appears. The Election Administration menu will appear.
- 182. **Press PEB Services.** The PEB Services menu appears.
- 183. **Press Prepare PEB for Compact Flash Audit.** A verification message appears with the question “Prepare PEB for COMPACTFLASH audit collection?”
- 184. **Press Yes.** When the process is complete the message “PEB prepared for COMPACTFLASH audit collection” appears. **Press the screen** to return to the Election Administration menu. **Remove the PEB and press the VOTE button** to power down.

### **Using the prepared PEB for Compact Flash Audit:**

- 185. If the terminal to be collected does not already have a compact flash card installed, **install a compact flash** in the slot at the top of the unit.
- 186. **Insert the prepared PEB** in the terminal.
- 187. The terminal will display: “Checking for Compact Flash”.
- 188. Once found, the terminal will display: “Storing Audit Data\adt\Vxxxxxxx.EBN, where the X’s will indicate the serial number of the terminal being collected. The file being collected is a compressed and encrypted binary file.
- 189. When completed, you will be prompted to **remove the PEB**, and the terminal will power down.
- 190. You **may remove the flash card.**

### **A-(2) Capturing Election Audit Data to Compact Flash**

If you do not want to use a “Prepared PEB” for the Compact Flash Audit, but want to upload manually to a compact flash, then perform the following steps:

NOTE: You must insert Compact Flash BEFORE initializing the iVotronic.

- 191. Use a Supervisor PEB to activate the Terminal Menu on a Voter terminal. Press the Election Administration menu and enter the password when the password screen appears. The Election Administration menu will appear.
- 192. Select Upload Data.
- 193. Select Upload Audit Data to Compact Flash.
- 194. The screen will display “Checking for compact Flash”.
- 195. Once found, the terminal will display “Storing Audit Data\adt\Vxxxxxxx.EBN, where the X’s will indicate the serial number of the terminal being collected. The file being collected is a compressed and encrypted binary file.
- 196. When completed, you will be returned to the Upload Data menu. Remove the PEB and press the VOTE button to power down.
- 197. When the terminal is powered down, you may remove the flash card.

### **Preparing PEB for Serial Audit**

This procedure allows a PEB from the polling location to be prepared to automate the process of collecting the audit data through a serial connection to the reporting Computer running ERM (Election Reporting Manager).

NOTE: Once a PEB has been prepared in this manner, it can no longer be used to initialize a ballot for this election.

- 198. Use a Supervisor PEB without vote totals on it to activate the Terminal Menu on a Supervisor terminal.
- 199. Press Election Administration. Enter the Election Administration password. The Election Administration menu appears.
- 200. Press PEB Services. The PEB Services menu appears.
- 201. Press Prepare PEB for Serial Audit.
- 202. A verification message appears with the question “Prepare PEB for Serial audit collection?”
- 203. Press Yes. When the process is complete the message “PEB prepared for serial audit collection” appears. Press the screen to return to the Election Administration menu. Remove the PEB and press the VOTE button to power down.

### **Uploading Terminal Audit Data**

Take the Prepared PEB to a blue voter terminal that has been connected to a PC with Election Reporting Manager running and the special menu items selected.

- 204. **Insert the prepared PEB.**
- 205. Follow the instructions on the screen:
  - a. **Connect the serial cable to the PC**
  - b. **Prepare PC to accept Audit Trail Data Upload**
  - c. **Press Vote button** to proceed with upload, **or Press screen** to skip upload
- 206. **Connect the voter terminal to the PC** by plugging one end of the serial cable into the back of the iVotronic and the other end into a COM port on the computer.
- 207. **Prepare the computer** and perform procedures according to ERM checklists for serial audit collection.
- 208. The remaining terminals can be connected to the computer and the audit data uploaded from the same computer screen.

### **Recollect Votes for Recount – Refer to Operator’s Manual**

Some situations may arise in an election that make a recount necessary. The iVotronic Voting System design makes this recount a simple procedure, as long as the equipment has not been prepared for another election (i.e., cleared and tested terminals and qualified supervisor PEBs).

The Master or Supervisor PEBs that were originally used at a polling location must be used to recollect the votes from that location’s voter terminals. The ballot formats must match. The voter terminals will not allow votes to be recollected to a Master or Supervisor PEB with different ballot formats.

### **Closing the Terminal Early**

**This procedure is not intended for, or recommended to be used by poll workers, as it requires a secure password. When necessary, this should only be performed by election staff and/or trainers.**

- 209. **Access the Terminal Menu** by inserting the Master PEB while pressing the VOTE button. The Terminal Menu is displayed.
- 210. **Select the Election Services option. Enter the Service Menu default password OR your jurisdiction's custom password, and press OK.**
- 211. **Select Close Terminal Early.** A question will be displayed, "Do you want to close the terminal early? **Press Yes.**
- 212. When prompted, **enter the Override default password OR your jurisdiction's custom password and press OK.**
- 213. Votes will be collected to the PEB, please wait.
- 214. The next screen will prompt you to **remove the PEB.** If a flash card is installed, the audit data will be copied to the flash card.
- 215. When closing and data collection is complete, the screen will prompt to "Touch the screen to exit". **Touch the screen** and the terminal will power down.