



## **eSlate Comprehensive Training Program**

The following eSlate Master Course Design flowcharts show the relationships between the courses offered in support of the eSlate System. Information for each course includes:

- Course name
- Recommended staff to receive the training
- Training materials resource
- Course objectives
- Overview and detailed description of the course content

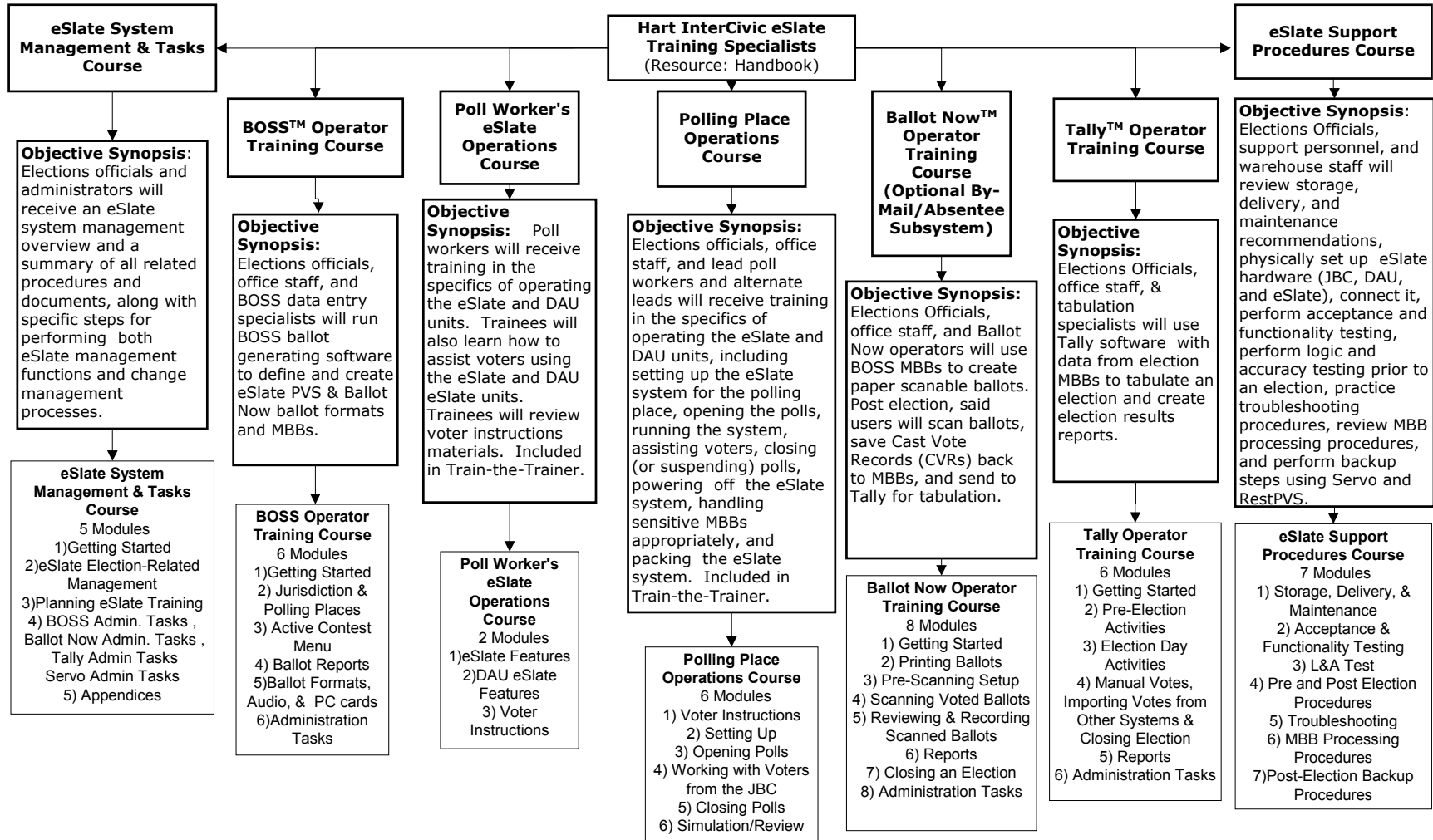
The eSlate Course Syllabi give greater detail to the courses shown in the Master Course Design. Each course syllabus includes:

- Course length
- Recommended audience
- Course objectives
- Benefits of the eSlate System
- Manuals available to support the course
- Description of course modules
- Course prerequisites
- Detailed teaching points.

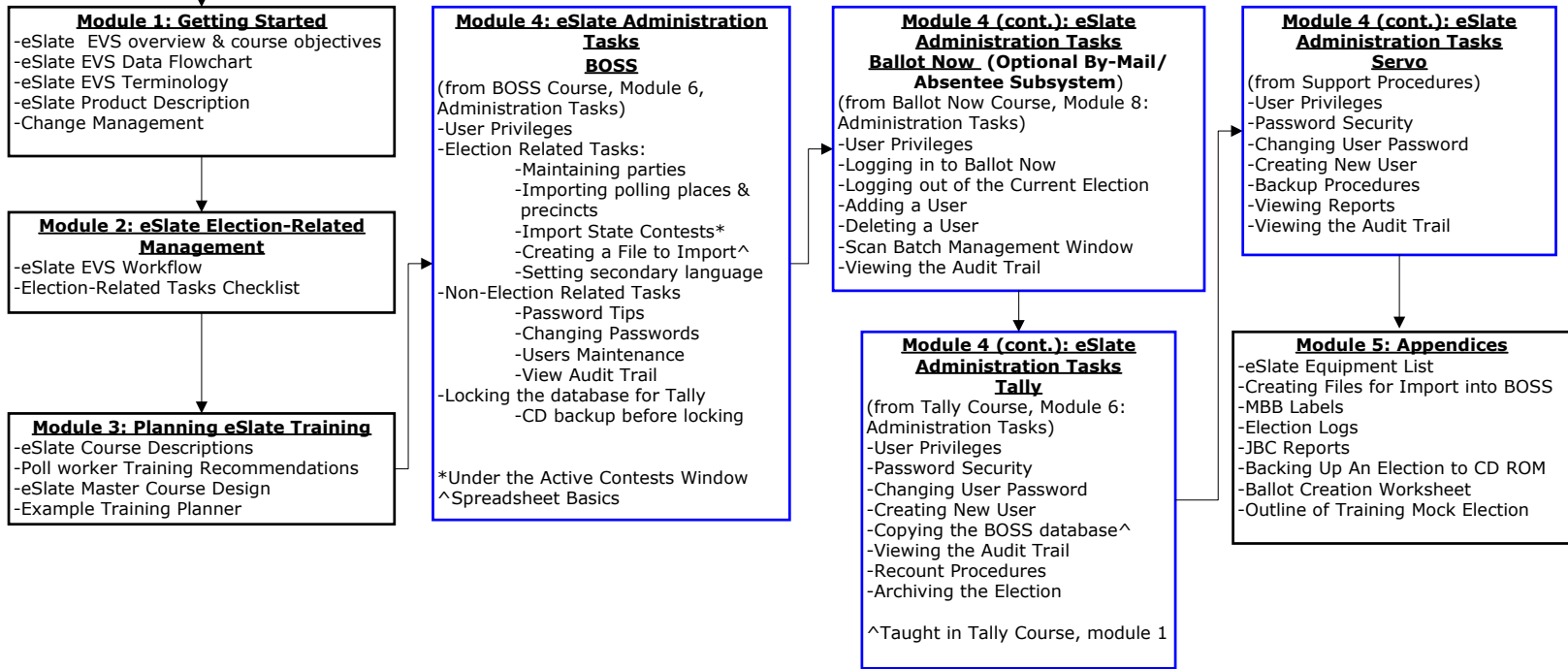
The eSlate System Training Planner presents the plan for training Boulder County Staff and Poll Workers. This plan will be finalized upon review by and discussion with Boulder County.



**eSlate Master Course Design**  
**Goal: Successful Operation**  
**of the eSlate™**  
**Electronic Voting System (EVS)**



# eSlate System Management & Tasks Course

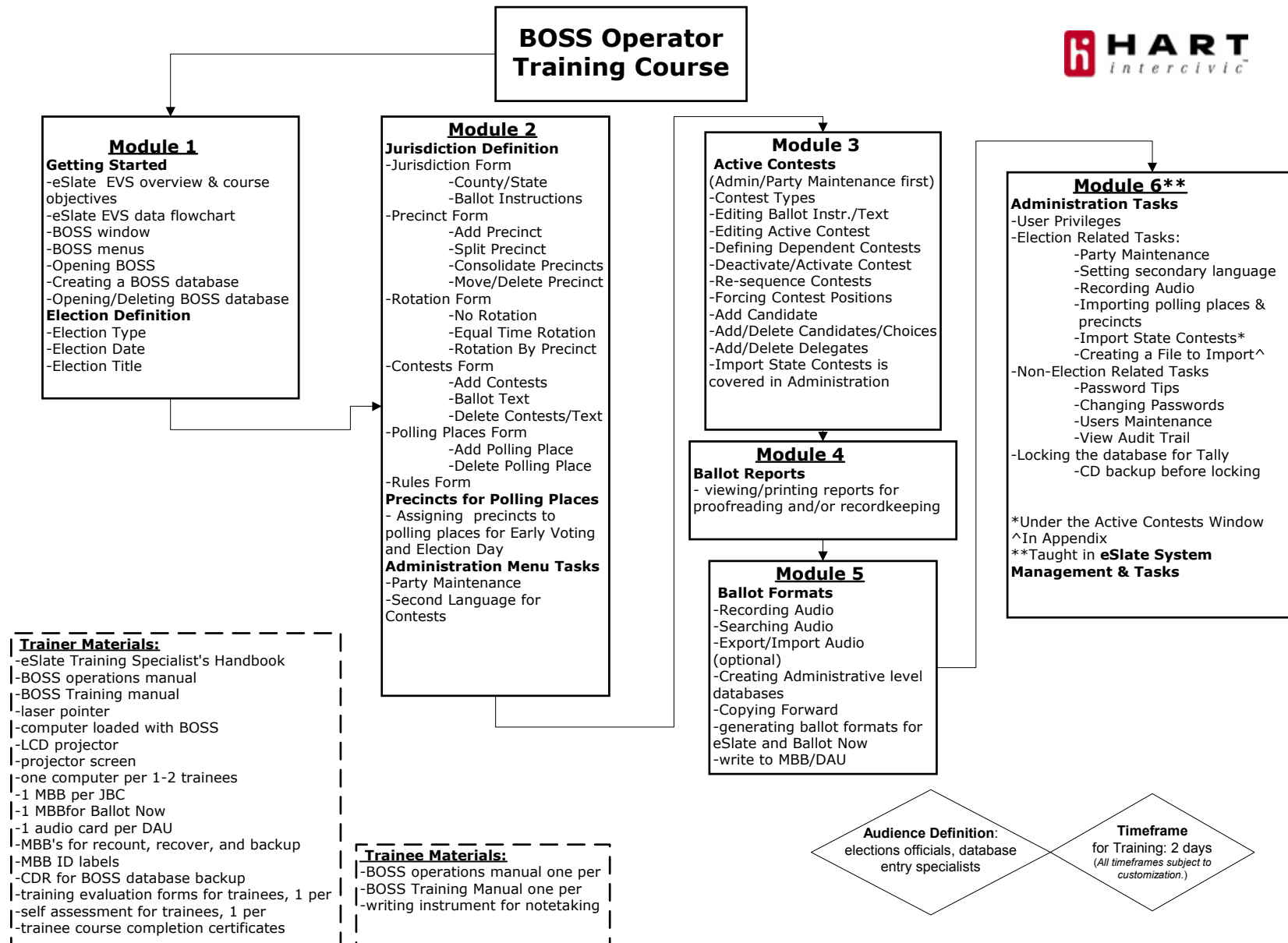


- Trainer Materials:**
- eSlate Training Specialist's Handbook
  - All software Operations Manuals
  - All system Training Manuals and Desk References
  - computer(s) with all software
  - scanner for Ballot Now
  - Printers
  - paper
  - Test and Election MBBs from BOSS
  - laser pointer
  - LCD projector
  - projector screen
  - training evaluation forms for trainees, 1 per
  - self assessment for trainees, 1 per
  - trainee course completion certificates

- Trainee Materials:**
- All software Operations Manuals
  - All system Training Manual s and Desk References
  - eSlate Product Description Document
  - eSlate System Management & Tasks Training Manual
  - writing instruments for notetaking

**Audience Definition:**  
Elections Officials and Administrators

**Timeframe for Training:** 3 hours  
*(All timeframes subject to customization.)*



## Poll Worker's eSlate Operations Course

**Module 1**  
**eSlate Features**

**How to Vote**

- Pick up ACCESS CODE after qualifying
- Go to any open booth
- Select language (if second language option available)
- Enter ACCESS CODE
- Make choices using the SELECT wheel and ENTER . You can skip pages with the NEXT button.
- Read the Ballot Summary
- Press CAST BALLOT from last page of Ballot Summary

**Other Features**

- PREV and NEXT
- HELP
- write-in
- straight party
- intentionally skipping contests
- canceling a choice
- changing a choice
- changing a choice from the Ballot Summary
- skipping the final contest
- multi-page Ballot Summary

**Module 2**  
**DAU eSlate Features**

**Disabled Access**

- DAU eSlate
- headphones
- jelly switches (Tactile Input Switches)
- orientation to buttons
- sip and puff device

**Curbside Voting**

- Getting the ACCESS CODE
- Checking for battery power
- Entering the ACCESS CODE
- Disconnecting the eSlate (and DAU peripherals)
- Vote and Cast Ballot
- Re-connect and confirm Cast Ballot (and re-connect DAU peripherals)

**Module 3**  
**Voter Instructions**

**Using the Script**

- four-step voter instructions

**Casting the Ballot**

- the voter has finished voting when s/he sees the waving American flag

**Trainer Materials:**

- eSlate Training Specialist's Handbook
- Course agenda
- eSlate Operations Desk Reference , 1 per poll worker
- Voters Instructions scripts
- Voter Instructions flyer s
- "How to Vote" .mpg presentation
- PowerPoint "poll worker" presentation
- LCD projector
- projector screen
- eSlate PVS equipment
- election MBB and audio cards from BOSS
- training evaluation forms (optional)
- trainee written review, 1 per trainee (optional)
- trainee course completion certificates (optional)

**Trainee Materials:**

- Poll Worker's eSlate Operations Desk Reference,
- Voter Instructions script,
- Voter Instructions flyer
- writing instruments for notetaking

**Audience Definition:**  
all poll workers

**Timeframe for Training:**  
1 hour  
*(All timeframes subject to customization.)*

**Train-the-Trainer:**  
(w/ Polling Place Operations)  
2 days

# Polling Place Operations Course

**Module 1**

**Getting Started**

- Hands on with the eSlate-eSlate EVS overview & course objectives
- Common eSlate PVS terminology
- Review Voter Instruction Materials
- Flyers, Placards, Video or PowerPoint

**Voter Instructions (Basic)**

- Pick up ACCESS CODE from election judge after signing in
- Go to any open booth
- Select language (if second language option available)
- Enter ACCESS CODE
- Make choices using the SELECT wheel and ENTER
- Read the Ballot Summary
- Press CAST BALLOT from the last page of Ballot Summary

**Other Features**

- PREV and NEXT
- HELP
- write-in
- straight party
- intentionally skipping contests
- canceling a choice
- changing a choice
- changing a choice from the Ballot Summary
- skipping the final contest
- multi-page Ballot Summary

**Trainer Materials:**

- eSlate Training Specialist's Handbook
- eSlate Polling Place System Desk & Quick References
- Voter Instruction scripts, placards and flyers
- "How to Vote" .mpg presentation
- PowerPoint "Polling Place Operations" presentation
- laser pointer
- LCD projector
- projector screen
- eSlate PVS equipment
- election MBBs and audio cards from BOSS
- envelopes and stickers for MBB and DAU pc card
- envelopes for JBC reports
- JBC reconciliation and canceled booth logs/ 1 per JBC
- Mock voter qualification document
- training evaluation forms
- trainee written review, 1 per trainee
- trainee course completion certificates
- Train-the-Trainer course trainer certification

**Module 2**

**Setting Up**

- Step 1: Check supplies
- Step 2: Plan Polling Place layout
- Step 3: Setting up the JBC(s)
- Step 4: Set up booths, eSlates & DAUs
- Make connections
- Check MBB/DAU cards
- Set up for curbside voting
- Identify/Implement security measures

**Module 3**

**Opening Polls**

- Connect batteries and AC power
- JBC self-diagnostic
- eSlate Button functionality test
- Polling Place ID
- Early Voting/Election Day
- Assign booth numbers
- Print Zero Tape Report
- Compare Zero Tape Report to sample ballot for ballot style verification (Election Day only)
- Open polls

**Module 4**

**Working with Voters from the JBC**

- Adding Voters
- How to tell when a voter needs help
- Adding a provisional voter
- Checking/Printing ACCESS CODEs
- Canceling a booth
- Working with voters with disabilities
- Curbside voting

**Trainee Materials:**

- eSlate Polling Place System Desk Reference
- writing instruments for notetaking

**Module 5**

**Closing the polls**

- Suspending polls after Early Voting
  - Polls Suspended report
- Re-opening the polls for Early Voting
  - Confirming Public Count
- Closing polls at the end of Election Day
  - Electronic Transfer of results data (modem results)
  - JBC Tally report
- Disconnecting Equipment
- Pack system

**Module 6**

**Simulation/Review**

- Perform simulation exercise
- Written Review
- Desk Reference Review
  - Troubleshooting
  - Security
  - Guide to Serving Voters with Disabilities
  - FAQ's
  - Glossary

**Audience Definition:**

Elections Officials,  
elections office staff,  
poll workers who will  
be  
operating  
the JBC

**Timeframe**  
for Training: 4 hours  
**Train-the-Trainer:**  
2 days  
*(All timeframes subject to customization.)*



# BALLOT NOW Operator Training Course (Optional By-Mail/Absentee Subsystem)

**Module 1**  
**-Getting Started**  
 -eSlate EVS overview & course objectives  
 -Recommendations, Physical Layout, and Organizing Ballots  
   -Election Law  
   -How Ballot Now reads ballots  
   -Recommended processes  
   -Sorting (Received, Sorted, AutoResolve for Undervotes, Scanned, Rejected from Scan, To be Duplicated, Printed, For Review)  
 -eSlate EVS Data Flowchart  
 -Ballot Now window  
 -Ballot Now menus & preferences  
 -User Privileges  
 -Logging in to Ballot Now  
 -Opening an Election

**Module 2**  
**- Printing Ballots**  
 -Pre-Printing Set up  
 -Preferences/Ballot Printing Tab  
 -Stub Label Options  
 -Print Selection Types  
 -Previewing & Printing Ballots

**Module 3**  
**-Pre-Scanning Set up**  
 -Defining certified write-in names and aliases  
 -Preferences/Ballot Resolution Tab (allowing free-form write-ins)  
 -Preferences/ Scanner set up Tab

**Module 4**  
**Scanning Voted Ballots**  
 -Grouping ballots into batches  
 -Loading pages into the scanner  
 -Scanning Ballots

**Module 5**  
**Recording Scanned Ballots**  
 -Resolving Unresolved Ballots  
   -Resolving Overvotes & Undervotes  
   -Resolving Certified Write-ins  
   -Resolving Free-form Write-ins  
   -AutoResolving Ballots  
 -Scan Batch Management  
   -Deleting a scan batch  
 -Saving CVRs to an MBB

**Module 6**  
**-Ballot Now Reports**  
 -Listing of Available Reports  
   -Election  
   -Scanned Ballots by Precinct  
   -Scanned Ballots by Batch  
   -Unresolved Ballots  
   -Printed Ballots by Precinct  
   -Certified Write-ins  
   -Ballot Now Audit Trail  
 -Viewing & Printing Reports  
 -Exporting a Report to File

**Module 7**  
**Closing an Election**  
 -Closing an election  
 -Logging out of Ballot Now

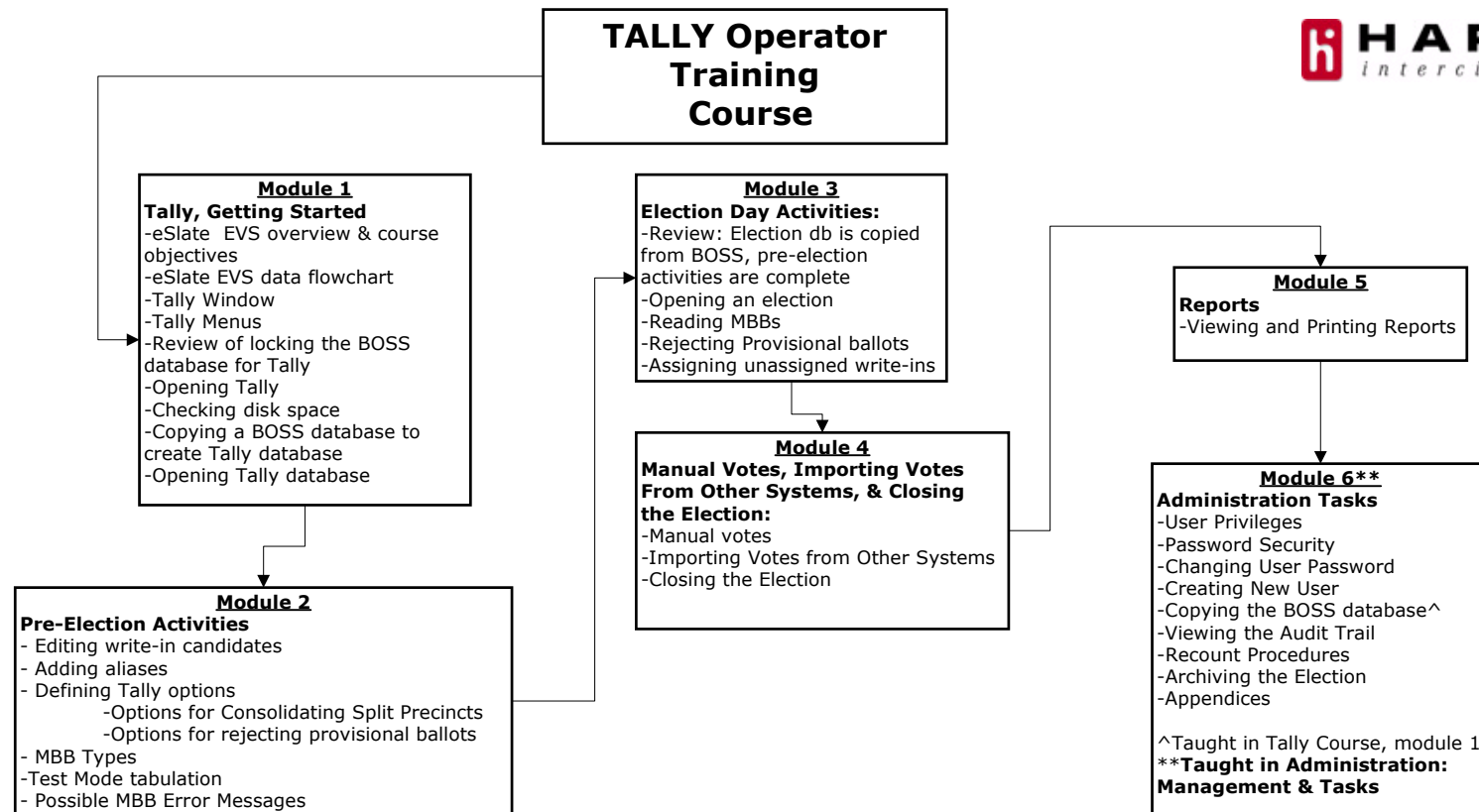
**Module 8\*\***  
**Administration Tasks**  
 -User Privileges  
 -Changing a password  
 -Adding a User  
 -Deleting a User  
 -(Scan Batch Management)  
 -Viewing the Audit Trail  
  
**\*\*Taught in eSlate System Management & Tasks**

**Audience Definition:**  
 elections officials, office personnel, Ballot Now operator

**Timeframe**  
 for Training: 1 day  
*(All timeframes subject to customization.)*

**Trainer Materials:**  
 -eSlate Training Specialist's Handbook  
 -Ballot Now Operations Manual  
 -Ballot Now Training Manual  
 -Ballot Now Organizational Forms  
 -computer with Ballot Now software  
 -scanner  
 -paper  
 -election MBB from BOSS  
 -laser pointer  
 -LCD projector  
 -projector screen  
 -training evaluation forms for trainees, 1 per  
 -self assessment for trainees, 1 per  
 -trainee course completion certificates

**Trainee Materials:**  
 -Ballot Now Operations Manual  
 -Ballot Now Training Manual  
 -writing instruments for notetaking

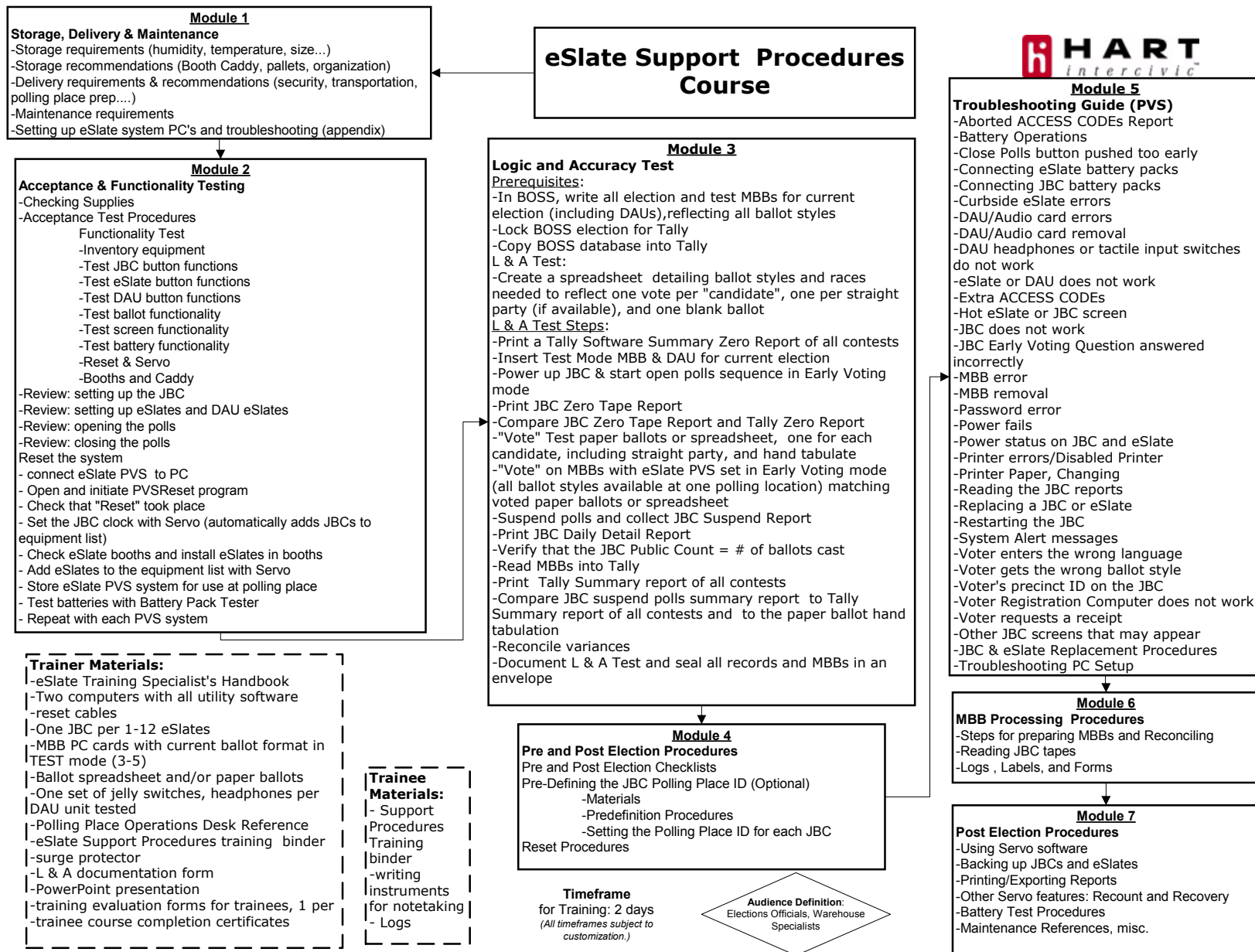


- Trainer Materials:**
- eSlate Training Specialist's Handbook
  - Tally Operations Manual
  - Tally Training Manual
  - MBBs with CVRs from the eSlate PVS and Ballot Now
  - computer with BOSS & Tally loaded
  - line printer
  - laser printer
  - laser pointer
  - LCD projector
  - projector screen
  - training evaluation forms for trainees, 1 per
  - self assessment for trainees, 1 per
  - trainee course completion certificates

- Trainee Materials:**
- Tally Operations Manual
  - Tally Training Manual
  - writing instruments for notetaking

**Audience Definition:**  
elections officials, office personnel, tabulation specialist

**Timeframe**  
for Training: 1 day  
*(All timeframes subject to customization.)*



## eSLATE COURSE SYLLABI

The following are summaries of Hart InterCivic's Training Course Syllabi. Complete Course Outlines and training schedule are provided as part of full implementation planning.

### ***eSlate System Management & Tasks Course***

**Estimated Time:** 3 hours

**Audience:** Elections Officials, Elections Specialists

**Objectives:** This course provides Elections Administrators with an overview of eSlate Electronic Voting System management, and the benefits of using the eSlate system. The course includes a brief section on the change management process, in order to help administrators successfully manage eSlate implementation and the change from a legacy system. This course also introduces BOSS, Ballot Now, and Tally administrative functions and options. The BOSS section is intended to demonstrate how to import files created for states, precincts and polling places as well as instruct trainees in how to create and save their own files for importing. It is also intended to demonstrate how to use the Administration menu to set the secondary language and manage parties. In the Ballot Now and Tally sections administrators will change information security-specific to the software.

**Benefits of the eSlate System:** The eSlate system is simple to manage. All software includes audit trail reports. The software is easy to navigate, as are the Judge's Booth Controller and the eSlate.

**Manuals:** eSlate System Management & Tasks Training Manual, eSlate Product Description document BOSS, Ballot Now, and Tally Operations Manuals, BOSS, Ballot Now and Tally Training Manuals.

**Modules:** Administration Management module 1, BOSS module 6, Ballot Now module 8, Tally module 6

**Prerequisite:** Hands-on demonstration with the eSlate. Trainees will use the system as if they are "voters", if time and equipment availability allow.

**Teaching Points:**

- **Getting Started**
  - ▶ System Overview and Benefits to Trainees, and Course Objectives
  - ▶ eSlate Data Flowchart
  - ▶ eSlate Terminology
  - ▶ Change Management

**eSlate Course Syllabus**  
**eSlate System Management & Tasks Course**

- **eSlate Election- Related Management**
  - ▶ eSlate Workflow
  - ▶ eSlate Election-Related Tasks Checklist
- **Planning eSlate Training**
  - ▶ eSlate Course Descriptions
  - ▶ Poll worker Training recommendations
  - ▶ eSlate Master Course Design
  - ▶ Example Training Planner
- **eSlate Administration Tasks**
  - ▶ BOSS tasks
  - ▶ Ballot Now tasks
  - ▶ Tally Tasks
  - ▶ Servo Tasks
- **Appendices**
  - ▶ eSlate Equipment List
  - ▶ Creating Files to import into BOSS
  - ▶ MBB labels
  - ▶ Election Logs
  - ▶ JBC Reports
  - ▶ Archiving an Election to CD ROM
  - ▶ Ballot Creation Worksheet
  - ▶ Outline of Training Mock Election
- **Review**
  - ▶ Q&A

## **BOSS Operator Training Course**

**Estimated Time:** 2 days

**Audience:** Boss Data Entry Specialists, Elections Officials

**Objectives:** This course introduces the BOSS program and takes the trainee through the steps for setting up the ballot.

**Benefits of BOSS:** The eSlate Ballot Origination Software System, BOSS, requires only data entry and menu selections to “program” an election. No software programming is required. Furthermore operators may use cut/copy and paste and importing shortcuts to make the process even simpler. There is no need to rebuild databases once a generic election database is saved. Databases can be copied forward and modified for future elections.

**Manuals:** BOSS Operations Manual, BOSS Training Manual

**Other Materials:** Election Organization outline for reference

**Modules:** 1-6

**Prerequisite:** Hands-on demonstration with the eSlate. Trainees will use the system as if they are “voters”, if time and equipment availability allow.

### **Teaching Points:**

- **Module 1: Getting Started**
  - ▶ System Overview and Benefits to Trainees, and Course Objectives
  - ▶ eSlate data flowchart, BOSS window, BOSS menus
  - ▶ Opening BOSS
  - ▶ Creating & Opening a BOSS database
  - ▶ Deleting a BOSS database
  - ▶ Election Definition Menu Option:
  
- **Module 2: Jurisdiction Definition and Polling Places**
  - ▶ Jurisdiction Form
  - ▶ Precincts Form
  - ▶ Rotation Form
  - ▶ Contests Form
  - ▶ Polling Places Form
  - ▶ Rules Form

- ▶ Precincts for Polling places Menu Option
  - ▷ Adding/Removing polling places to Election Day
  - ▷ Adding/Removing polling places to Early Voting
  - ▷ Assigning Precincts to Polling Places
- ▶ Party Maintenance (Administration Menu)
- ▶ Second Language for Contests (Administration Menu)
  
- **Module 3: Active Contests (Set Party Maintenance First)**
  - ▶ Contest Types
  
- **Module 3, continued:**
  
- **Module 4: Ballot Reports**
  - ▶ Viewing and Printing Reports (proofreading)
  - ▶ Listing of Available Reports
  
- **Module 5: Audio & Ballot Formats**
  - ▶ Recording Audio
  
- **Module 6: BOSS Administration Tasks**
  - ▶ User Privileges
  - ▶ Election Related Tasks
  - ▶ Non-Election Related Tasks
  - ▶ Locking the database for Tally
  
- **Appendices/Review;**
  - ▶ Q&A

## ***Poll Worker's eSlate Operations Course***

**Estimated Time:** 1 hour

**Audience:** All poll workers

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

**Benefits of the eSlate:** The eSlate is simple to operate. There are on-screen prompts that guide the voter through the voting process. Voters learn the system quickly. There is no way a voter can overvote, and voters are reminded of their undervotes. There are no voter intent issues. Voters with disabilities have equal and private access to voting.

**Manuals:** eSlate Poll Worker's Desk Reference

**Other Materials:** Poll worker Training PowerPoint Slideshow, Voter Instructions flyers, Voter Instructions placards, Flag placards, Voter Instructions script, How to Vote video/.mpg.

**Modules:** 1-3

**Prerequisite:** None

**Teaching Points:**

- **Module 1: eSlate Features**
  - ▶ System Overview, Benefits to Trainees, and Course Objectives
  - ▶ How to Vote
  - ▶ Other Features
  
- **Module 2: DAU eSlate Features (Demonstration Only)**
  - ▶ Disabled Access Unit
  - ▶ Curbside Voting
  
- **Module 3: Voter Instructions**
  - ▶ Voter Instructions
  
- **Review**
  - ▶ Security, Guide to Serving Voters with Disabilities, FAQ's
  - ▶ Q & A.

## ***eSlate Polling Place Operations Course***

**Estimated Time:** 4 hours

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

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

**Benefits of the eSlate:** The eSlate and JBC are lightweight, simple to operate with on-screen prompts and easy to monitor. With the JBC it is not a difficult task to get the voter's correct ballot style/precinct. Voters quickly learn the system. There is no way a voter can overvote, and voters are reminded of their undervotes. There are no voter intent issues. Voters with disabilities have equal and private access to voting.

**Manuals:** eSlate Polling Place Operations Desk Reference

**Other Materials:** eSlate System Desk Reference, Voter Instructions Flyers & Placards, Flag Placards, Voter Instructions Script, Reconciliation Log, Mock voter qualification log, Written Review, Training Evaluation form, How to Vote video/.mpg and PowerPoint slideshow(s).

**Modules:** 1-6

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

**Teaching Points:**

- **Module 1: Voter Instructions**
  - ▶ Getting Started - System Overview and Benefits to Trainees, and Course Objectives
  - ▶ Voter Instruction Materials
  - ▶ Basic Voter Instructions
  - ▶ Other Features
  
- **Module 2: Setting Up**
  - ▶ Step 1: Checking Supplies
  - ▶ Step 2: Planning the Polling Place Layout
  - ▶ Step 3: Setting up the JBC
  - ▶ Step 4: Setting up the eSlates and DAUs
  
- **Module 3: Opening the Polls**
  - ▶ Opening for Early Voting (day 1), or Election Day
  
- **Module 4: Working With Voters from the JBC**
  - ▶ Adding Voters
  - ▶ How to tell when a Voter Needs Help
  - ▶ Adding a Provisional Voter
  - ▶ Checking an ACCESS CODE
  - ▶ Canceling a booth
  - ▶ Working with Voters with Disabilities
  - ▶ Curbside Voting
  
- **Module 5: Closing the Polls**
  - ▶ Suspending the Polls for Early Voting
  - ▶ Re-opening the Polls for Early Voting
  - ▶ Closing the Polls for Election Day
  - ▶ Disconnecting equipment
  
- **Module 6: Simulation/Review**
  - ▶ Simulation
  - ▶ Appendices:
  - ▶ Review/Q&A

## ***Ballot Now Operator Training Course***

**Estimated Time:** 1 day

**Audience:** Ballot Now Specialists, Elections Officials

**Objectives:** By the end of this course the trainee will be creating paper ballots using BOSS™-generated MBBs. The trainee will also run voted paper ballots through the Ballot Now scanner, resolve unresolved ballots, save the scanned cast vote records back to the original election MBB, and prepare the cast vote record for Tally vote-tabulating software.

**Benefits of Ballot Now:** Ballot Now integrates fully with the eSlate in-person voting system. Ballot Now uses PC technology that is simple to operate, and requires no programming. Ballot Now allows for printing, scanning, and resolving ballots. Ballot Now ballots include bar codes for precinct and serial number identification, obviating the need to sort ballots prior to scanning and preventing the same ballot from being scanned more than once. Ballots that need resolution are not out-stacked, but resolved on the PC by reviewing ballot images. The original ballot is not altered in order to resolve it, and it is always available in its original form.

**Manuals:** Ballot Now Operations Manual, Ballot Now Training Manual

**Modules:** 1-8

**Teaching Points:**

- **Module 1: Getting Started**
  - ▶ System Overview and Benefits to Trainees, and Course Objectives
  - ▶ Recommendations/Physical Layout/Organizing Ballots
  - ▶ eSlate data flowchart, Ballot Now Window, Ballot Now menus, Ballot Now preferences/Program Options window tabs
  - ▶ User Privileges
  - ▶ Logging in to Ballot Now
  - ▶ Opening an Election

**eSlate Course Syllabus  
Ballot Now Course (cont.)**

- **Module 2: Printing**
  - ▶ Pre-Printing Setup
  - ▶ Print Selection Types
  - ▶ Previewing & Printing Ballots
  - ▶ Printing a Printed Ballots By Precinct Report
  
- **3: Pre-Scanning Setup**
  - ▶ Defining Certified Write-In names and aliases.
  - ▶ Preferences/Scanner Setup Tab
  
- **Module 4: Scanning Voted Ballots**
  - ▶ Grouping Ballots into Batches
  - ▶ Loading Pages into the Scanner
  - ▶ Scanning Ballots
  - ▶ Printing a Batch Scan Report
  
- **Module 5: Recording Scanned Ballots**
  - ▶ Resolving Unresolved Ballots
  - ▶ Scan Batch Management
  - ▶ Deleting a Scan Batch
  - ▶ Saving CVRs to the MBB
  - ▶ Printing an Audit Trail Report
  
- **Module 6: Reports**
  - ▶ Viewing and Printing Reports
  - ▶ Listing of Available Reports
  - ▶ Exporting a Report to a File
  - ▶ Sample Report
  
- **Module 7: Closing an Election**
  - ▶ Closing an Election
  - ▶ Logging out of Ballot Now
  
- **Module 8: Ballot Now Administration Tasks**
  - ▶ Ballot Now User Privileges
  - ▶ Changing a password
  - ▶ Adding A User
  - ▶ Deleting a User
  - ▶ (Scan Batch Management)
  - ▶ Viewing the Ballot Now Audit Trail
  - ▶ Appendices
  
- **Appendices/Review**
  - ▶ Appendices;
  - ▶ Review

## **Tally Operator Training Course**

**Estimated Time:** 1 day

**Audience:** Tabulation specialists, Elections Officials

**Objectives:** Trainees will open Tally and copy a BOSS database, set up Tally before the election starts, read MBBs, look at challenged ballots, assign write-ins, enter absentee and manual votes, viewing and printing Tally reports, close an election and archiving the Tally database.

**Benefits of Tally:** Tally tabulates the cast votes with “one click” simplicity. Certified write-ins can be identified before tabulation takes place, making counting votes for those positions automatic. Provisional ballots can be automatically included in the count, or not, and can be backed out or added if challenged. Test mode tabulations are kept in separate databases from election mode databases.

**Manuals:** Tally Operations Manual, Tally Training Manual

**Modules:** 1-6

**Prerequisite:** Hands-on demonstration with the eSlate. Trainees will use the system as if they are “voters”, if time and equipment availability allow.

**Teaching Points:**

- **Module 1: Tally, Getting Started**
  - ▶ System Overview and Benefits to Trainees, and Course Objectives
  - ▶ eSlate data flowchart, Tally Window, Tally menus
  - ▶ Review Locking the BOSS database for Tally
  - ▶ Opening Tally
  - ▶ Checking disk space
  - ▶ Copying a BOSS database to Tally
  - ▶ Opening a Tally database

- **Module 2: Pre-Election Activities**
  - ▶ Editing Write-In Candidates
  - ▶ Adding aliases
  - ▶ Defining Tally Options
  - ▶ Mobile Ballot Box Types
  - ▶ Test Mode Tabulation (Pre-Election Logic & Accuracy Test)
  - ▶ Possible MBB Error Messages
  
- **Module 3: Election Day Activities**
  - ▶ Opening an Election (with a new Tally database, Pre-Election Activities completed sans Test Tabulation) & reading Election MBBs.
  - ▶ Assigning unassigned write-ins
  
- **Module 4: Manual Votes, Importing Votes from Other Systems & Closing the Election**
  - ▶ Manual Votes
  - ▶ Importing Votes from Other Systems
  - ▶ Closing the Election
  - ▶ Rejecting or Accepting Challenged Provisional Ballots
  - ▶ Backing Up the Tally Database to a CD-R.
  
- **Module 5: Reports**
  - ▶ Reports
  
- **Module 6: Tally Administration Tasks**
  - ▶ User Privileges
  - ▶ Password Security
  - ▶ Changing User Password
  - ▶ Creating New User
  - ▶ Copying a BOSS database (covered in Tally Course, Module 1)
  - ▶ Procedures for a recount or contested election
  - ▶ Viewing the Audit Trail (soft and paper formats)
  - ▶ Archiving the Election
  - ▶ Appendices
  
- **Appendices/Review**
  - ▶ Appendices
  - ▶ Q&A

## **eSlate Support Procedures Course**

**Estimated Time:** 2 days

**Audience:** Warehouse Contacts, Elections Officials, and Information Specialists, and support personnel

**Objectives:** Trainees will practice proper storage, delivery, and maintenance practices for longevity of the eSlate components. Trainees will learn how to perform an Acceptance/Functionality Test with the eSlate PVS, and reset the system. Trainees will learn how to conduct logic and accuracy tests on the eSlate system to document that the system is processing ballots properly. Trainees will also learn how to troubleshoot the eSlate PVS and how to perform post-election backup procedures using the Servo utility. Early Voting and Election Day MBB processors will review procedures for processing MBBs and reconciling variances between ACCESS CODEs Voted and Voters Qualified at the polling places.

**Benefits of eSlate Support Procedures:** With knowledge of eSlate support procedures in hand local personnel can run full election cycles independently. All of the procedures involved are straightforward, and they lend themselves to local modifications.

**Manuals:** eSlate Support Procedures Training Manual

**Modules:** 1-7

**Prerequisite:** Hands-on demonstration with the eSlate. Trainees will use the system as if they are “voters”, if time and equipment availability allow.

### **Teaching Points:**

- **Module 1: Storage, Delivery & Maintenance**
  - ▶ Storage requirements (humidity, temperature, ...)
  - ▶ Storage recommendations (stacking, pallets, organization)
  - ▶ Delivery requirements
  - ▶ Maintenance requirements
  
- **Module 2: Acceptance & Functionality Testing**
  - ▶ Checking supplies
  - ▶ Acceptance Test Procedures
  - ▶ Open and initiate Servo program
  - ▶ Review: Setting up the JBC
  - ▶ Review: Setting up eSlates and DAU eSlates
  - ▶ Review: Opening the polls
  - ▶ Review: Closing the polls for Election Day
  - ▶ Review: Reset the system

- **Module 3: Logic & Accuracy Testing**
  - ▶ Prerequisites:
  - ▶ Logic and Accuracy Test Steps
  
- **Module 4: Pre and Post Election Procedures**
  - ▶ Pre and Post Election Checklists
  - ▶ Pre-Defining the JBC Polling Place ID
  - ▶ Reset Procedures
  
- **Module 5: Troubleshooting Guide**
  - ▶ Aborted ACCESS CODEs Report
  - ▶ Battery Operations
  - ▶ Close Polls button pushed too early
  - ▶ Connecting eSlate battery packs
  - ▶ Connecting JBC battery packs
  - ▶ Curbside eSlate errors
  - ▶ DAU/Audio card errors
  - ▶ DAU/Audio card removal
  - ▶ DAU headphones or tactile input switches do not work
  - ▶ eSlate or DAU does not work
  - ▶ Extra ACCESS CODES
  - ▶ Hot eSlate or JBC screen
  - ▶ JBC does not work
  - ▶ JBC Early Voting Question answered incorrectly
  - ▶ MBB error
  - ▶ MBB removal
  - ▶ Password error
  - ▶ Power fails
  - ▶ Power status on JBC and eSlate
  - ▶ Printer errors/Disabled Printer
  - ▶ Printer Paper, Changing
  - ▶ Reading the JBC reports
  - ▶ Restarting the JBC
  - ▶ System Alert messages
  - ▶ Voter enters the wrong language
  - ▶ Voter gets the wrong ballot style
  - ▶ Voter's precinct ID on the JBC
  - ▶ VR computer does not work
  - ▶ Voter requests a receipt
  - ▶ Other JBC screens that may appear
  - ▶ JBC & eSlate Replacement Procedures
  - ▶ Troubleshooting PC Set Up

- **Module 6: MBB Processing Procedures**
  - ▶ Steps for preparing MBBs for Tally and reconciling variances in the number of ACCESS CODEs Voted and the number of Voters Qualified at the polling places
  - ▶ Reading JBC tapes
  - ▶ Logs, Labels, and Forms for tracking MBBs, equipment serial numbers, and seals
  
- **Module 7: Post Election Backup**
  - ▶ Using the Servo utility
  - ▶ Backing up JBCs and eSlates
  - ▶ Printing/Exporting Reports
  - ▶ Conducting Recounts per district, per polling place, per contest, per election
  - ▶ Other Servo Features: Recount and Recovery MBBs, Audit Trail...
  
- **Appendices/Review**
  - ▶ Appendices
  - ▶ Q&A

## Train-the-Trainer eSlate Polling Place Operations Course

**Estimated Time:** 2 days, 16 hours

**Audience:** Client employees and/or delegates who will be conducting eSlate Polling Place Operations Courses.

**Objectives:** After completing this course the trainee will successfully conduct eSlate Polling Place Operations Courses to teach lead Poll workers how to operate the eSlate and DAU eSlate, instruct voters, set up the eSlate Electronic Voting System polling place components, run the Judge's Booth Controller, assist voters, suspend (and reopen) or close the polls, and pack up the eSlate equipment.

**Benefits of the eSlate:** The eSlate and Judge's Booth Controller (JBC) are lightweight, simple to operate with on-screen prompts and easy to monitor. With the JBC it is not a difficult task to get the voter's correct ballot style/precinct. Voters quickly learn the system. There is no way a voter can overvote, and voters are reminded of their undervotes. Voters with disabilities have an equal and private access to voting.

**Manuals:** eSlate Polling Place Operations Desk Reference, Poll Worker's eSlate Desk Reference (soft and hard copy)

**Other Materials:** eSlate System Quick Reference, Voter Instructions Flyers & Placards, Flag Placards, Poll Worker's Script, Reconciliation Log, Mock voter qualification log, Written Review, Training Evaluation form, Tough Screen not Touch Screen document, How to Vote video/.mpg and PowerPoint slideshow(s) (soft and hard copy as appropriate)

**Sections:** 1-4

**Prerequisite:** Hands-on demonstration with the eSlate. Trainees will use the system as if they are "voters" after they enter the classroom. Participation in a Hart InterCivic eSlate Training Specialist led eSlate Polling Place Operations Course.

Train-the-Trainer eSlate Polling Place Operations (cont.)

Teaching Points:

- ☒ **Section 1: Teaching eSlate Training Courses –Andragogy**
  - ▶▶ Letting learners know why something is important to learn, showing learners how to direct themselves through the information, relating to the learners' experiences, motivating learners, reinforcing learning in order to increase retention and transference.
  - ▶▶ Hands-on based.
  - ▶▶ Fast paced.
  - ▶▶ Multi-sensory and Multi-media
  - ▶▶ Guided by reference materials
  
- ☒ **Section 2: System Expertise – Knowledge**
  - ▶▶ Course Content:
    - **Module 1: Voter Instructions**
      - ▶ Getting Started - System Overview and Benefits to Trainees, and Course Objectives
      - ▶ Voter Instruction Materials
      - ▶ Basic Voter Instructions
      - ▶ Other Features
    - **Module 2: Setting Up**
      - ▶ Step 1: Checking Supplies
      - ▶ Step 2: Planning the Polling Place Layout
      - ▶ Step 3: Setting up the JBC
      - ▶ Step 4: Setting up the eSlates and DAUs
    - **Module 3: Opening the Polls**
      - ▶ Opening for Early Voting (day 1), or Election Day
    - **Module 4: Working With Voters from the JBC**
      - ▶ Adding Voters
      - ▶ How to tell when a Voter Needs Help
      - ▶ Adding a Provisional Voter
      - ▶ Checking an ACCESS CODE
      - ▶ Canceling a booth
      - ▶ Working with Voters with Disabilities
      - ▶ Curbside Voting

Train-the-Trainer eSlate Polling Place Operations (cont.)

- **Module 5: Closing the Polls**
  - ▶ Suspending the Polls for Early Voting
  - ▶ Re-opening the Polls for Early Voting
  - ▶ Closing the Polls for Election Day
  - ▶ Disconnecting equipment
  
- **Module 6: Simulation/Review**
  - ▶ Simulation
  - ▶ Appendices:
  - ▶ Review/Q&A
  
- ☒ **Section 2: System Expertise – Knowledge (cont.)**
  - ▶▶ Troubleshooting
  
- **Troubleshooting guide (detail)**
  - ▶ Aborted ACCESS CODEs Report
  - ▶ Battery Operations
  - ▶ Close Polls button pushed too early
  - ▶ Connecting eSlate/JBC battery packs
  - ▶ Curbside eSlate errors
  - ▶ DAU/Audio card errors
  - ▶ DAU/Audio card removal
  - ▶ DAU headphones or tactile input switches do not work
  - ▶ eSlate or DAU does not work
  - ▶ Extra ACCESS CODEs
  - ▶ JBC Early Voting Question answered incorrectly
  - ▶ MBB error
  - ▶ MBB removal
  - ▶ Password error
  - ▶ Power fails
  - ▶ Power status on JBC and eSlate
  - ▶ Printer errors/Disabled Printer
  - ▶ Printer Paper, Changing
  - ▶ Reading the JBC reports
  - ▶ Restarting the JBC
  - ▶ System Alert messages
  - ▶ Voter enters the wrong language
  - ▶ Voter gets the wrong ballot style
  - ▶ Voter needs DAU features
  - ▶ Voter's precinct ID on the JBC
  - ▶ VR computer does not work
  - ▶ Voter requests a receipt
  
- ☒ **Section 2: System Expertise – Knowledge (cont.)**
  - ▶▶ System Security
  - ▶▶ System Hardware

**Train-the-Trainer eSlate Polling Place Operations (cont.)**

☒ **Section 3: Presentation Skills and Materials**

- ▶▶ Review Materials available
- ▶▶ Presentation Techniques:
- ▶▶ Trainees present and critique

☒ **Section 4: Review**

- ▶▶ Q&A
- ▶▶ Trainee Exam
- ▶▶ Certification and Agreement Clause (certificates to be mailed later, after results of exam are in)

eSlate Training Planner for Boulder County															
Details	Course Titles														
	eSlate System Management & Tasks Course <sup>1</sup>	Polling Place Operations Course (Admin.) <sup>3</sup>	BOSS Operator Training Course <sup>2</sup>	Ballot Now Operator Training Course (Optional By-Mail Software) <sup>2</sup>	Tally & Rally Operator Training Course <sup>2</sup>	Rally Substation Operator Training Course <sup>2</sup>	eSlate Support Procedures Course <sup>2</sup>	Intra-Office Mock Election <sup>2</sup>	EV Poll Worker's eSlate Operations Course <sup>3</sup>	EV Polling Place Operations Course <sup>3</sup>	ED Poll Worker's eSlate Operations Course <sup>3</sup>	ED Polling Place Operations Course <sup>3</sup>	EV & ED Re-Scheduled or "Emergency" Polling Place Operations Classes <sup>3</sup>	Train-the-Trainer Polling Place Operations <sup>1</sup>	
Central Office	6	6	6	4	6	2	2	6						3	
Support/Warehouse Personnel		18		2	2	2	6	6						3	
Paper Ballot Resolution Team Members				2											
Substation Rally Operators						6		6							
Lead Poll Workers										3	250	250		10	
Alternate Lead Poll Workers										3	250	250			
Poll Workers/Clerks										18	1100				
Class size	8	24	8	8	8	10	16	24	50	24	50	24	24	20	
Time allowed for course	2 hours	4 hours	2 days	1 day	1.5 days	2 hours	2 days	1 day	1 hour	4 hours	1 hour	4 hours	4 hours	2 days	
Sessions per day	4	2	0.5	1	0.66	4	0.5	1	6	2	6	2	2	0.5	
Number of trainees	6	24	6	8	8	10	8	18	0	24	1600	500	53	16	
Number of sessions	1	1	1	1	1	1	1	1	0	1	32	21	3	1	
Number of calendar days	0.25	0.5	2	1	1.5	0.25	2	1	0	0.5	5.5	10.5	1.5	2	
Number of classroom hours	2	4	16	8	12	2	16	8	0	4	44	84	12	16	
Number of trainer person-hours	3	6	24	12	18	3	24	12	0	6	66	126	18	24	
<b>Total Number of Trainees</b>	<b>2281</b>		<b># of Precincts</b>		<b>250</b>			<b># of Early Voting Polling Places</b>				<b>3</b>			
<b>Total Calendar Days of Training</b>	<b>28.5</b>		<b># of Registered Voters (estimate)</b>		<b>200,000</b>			<b># of Election Day Polling Places</b>				<b>250</b>			
<b>Total Classroom Hours of Training</b>	<b>228</b>		<b># of By-Mail Voters (last election)</b>		<b>26,550</b>										
<b>Total Trainer Person-Hours</b>	<b>342</b>														
<b># of Management-Level Trainees<sup>1</sup></b>	<b>22</b>														
<b># of Software Trainees<sup>2</sup></b>	<b>58</b>														
<b># of Poll Worker Trainees<sup>3</sup></b>	<b>2201</b>														
<p>This is the eSlate Training Planner.</p> <p>The table is based on:</p> <ul style="list-style-type: none"> <li>No more than two software course trainees per available PC</li> <li>Hart InterCivic Trainers leading the first phase of Election Day and Early Voting poll worker training</li> <li>Conducting eSlate Operations Courses for poll workers before conducting eSlate Polling Place Operations training, as applicable</li> <li>Conducting full eSlate Polling Place Operations training with lead and alternate lead poll workers</li> <li>Including Re-Scheduled, or "Emergency", classes for up to 10% of the poll workers assigned to Polling Place Operations courses. This is a risk-reduction step.</li> <li>Implementing Hart InterCivic's Train-the-trainer program for future poll worker training</li> <li>Central Office Staff of up to 8</li> <li>Support Staff of up to 8</li> <li>Miscellaneous temporary and part-time staff</li> </ul> <p>Note: the Intra-office Training Mock Election is intended as an in-house practice applying the skills learned in training. It is not a public test of the system.</p>															