



# **Electronic Pollbook Addendum For the 2024 Presidential Primary**

February 2024

**I. Summary of EPB software changes and procedure ..... 1**

**II. Processing Voters – Information for Election Inspectors ..... 3**

    Completing the Application to Vote/Ballot Selection Form .....3

    Assigning a Ballot in the Electronic Pollbook .....3

    Changing the Ballot Type.....5

    Spoiling a Ballot.....6

    Voter Tabulation of AV Ballots on Election Day.....8

**EPB Download Options .....8**

**Issuing Ballot in EPB .....8**

        Reminder: Recording AV Ballots Processed in the Precinct by Election  
        Inspectors..... 10

**III. Ballot Summary ..... 12**

**IV. List of Voters..... 15**



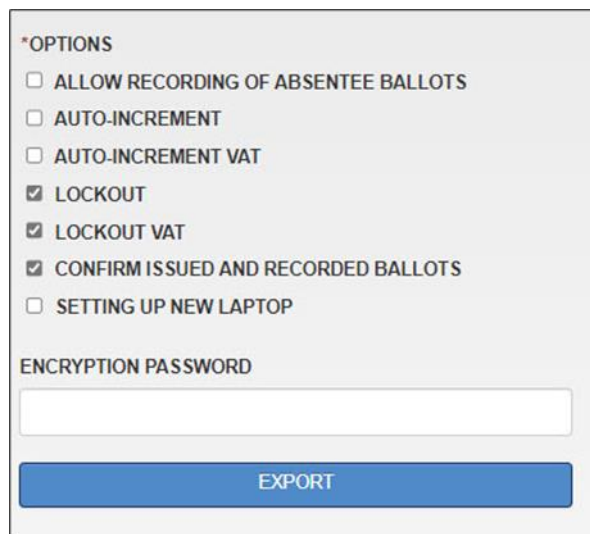
# I. Summary of EPB software changes and procedure

The February 27, 2024 Michigan Presidential Primary requires tracking the voter's ballot selection (Democratic, Republican, or a ballot without a Presidential Primary where applicable). This requires temporary changes to certain election and Electronic Pollbook (EPB) procedures detailed below.

- **Auto-Increment/Auto Advance** settings must remain turned **off** for the Presidential Primary. The EPB Auto Advance feature does not have the capability to track Presidential Primary ballot types.
  - Each ballot number must be carefully typed into the Electronic Pollbook. This procedure is the same as the last two Presidential Primaries.
- **Lockout** settings can be changed at download and under File>Options.
- **Ballot Type Selection** must be recorded when assigning a ballot to a voter.

Note: Ballot summary number ranges need to be recorded for each ballot style and type. This can be set up ahead of time in QVF by a QVF user or on Election Day in the EPB by an election inspector.

The **Auto-Increment/Auto Advance** feature must be turned **off** (box left unchecked) for the Presidential Primary since the EPB Auto Advance feature does not have the capability to track Presidential Primary ballot types.



\*OPTIONS

- ALLOW RECORDING OF ABSENTEE BALLOTS
- AUTO-INCREMENT
- AUTO-INCREMENT VAT
- LOCKOUT
- LOCKOUT VAT
- CONFIRM ISSUED AND RECORDED BALLOTS
- SETTING UP NEW LAPTOP

ENCRYPTION PASSWORD

EXPORT



The **Lockout** feature may be enabled **if** the different ballot types were numbered with unique number sequences in accordance with closed presidential primary ballot production standards. For example:

### Recommended Lockout Settings

Lockout - By Ballot Style if... (recommended by BOE)		Lockout - None/Unchecked, if...	
Democratic ballots	1001-1500	Democratic ballots	1001-1500
Republican ballots	2001-2500	Republican ballots	1001-1500
Ballot w/o Presidential Primary	3001-3500	Ballot w/o Presidential Primary	1001-1500

If your county ordered ballots with different ballot number sequences to differentiate the political party ballots, when downloading the EPB from QVF, use the following option: enable "Lockout" by ballot style for the presidential primary. This prevents ballot numbers from repeating across ballot and party types.

If your county did not use different ballot number sequences to differentiate party ballots, the Lockout cannot be used as an option, and great care will need to be taken by election inspectors when issuing ballots and recording ballots on Election Day to ensure the correct ballot numbers are recorded.

If your jurisdiction does not have an AV Counting Board and instead, election inspectors process AV ballots in the precinct, use the following option: "Allow the recording of absentee ballots". Jurisdictions with AV Counting boards should not use this option.

**\*OPTIONS**

- ALLOW RECORDING OF ABSENTEE BALLOTS**
- AUTO-INCREMENT**
- AUTO-INCREMENT VAT**
- LOCKOUT**
- LOCKOUT VAT**
- CONFIRM ISSUED AND RECORDED BALLOTS**
- SETTING UP NEW LAPTOP**

DOWNLOAD NEW LAPTOP FILES ONLY



If these options are not selected in QVF before downloading the EPB, these settings can be turned on in the EPB by selecting "File" and "Options".

Lockout: **BY BALLOT STYLE**  Including VAT Ballots  
 Allow the recording of absentee ballots:

## II. Processing Voters – Information for Election Inspectors

Voters must select a ballot type for the Presidential Primary. The Electronic Pollbook (EPB) has been modified to record the ballot type with a simple selector screen. Besides the Application to Vote, this is the only place a voter's ballot type should be recorded. The recording of the ballot type will transfer to QVF during the voting history upload performed by the Clerk after the election. No further steps are necessary for logging ballot type.

### Completing the Application to Vote/Ballot Selection Form

**Application to Vote/Ballot Selection Form**  
Photo ID must be shown unless it's not in the voter's possession. A voter without photo ID may instead complete the Affidavit of Voter Not in Possession of Photo ID below and vote a regular ballot.

February 27, 2024 Presidential Primary      Precinct

ELECTION INSPECTOR COMPLETED	PRINT NAME:
<input type="checkbox"/> ID AFFIDAVIT COMPLETED	DATE OF BIRTH:
ELIC INSP. INITIAL	RESIDENCE ADDRESS:
BALLOT STYLE	
BALLOT NO.	
VOTER NO.	

I certify that I am a United States citizen and a registered and qualified elector in this precinct, and hereby make application to vote at this election.

SIGN HERE X SIGNATURE OF VOTER

**SELECT BALLOT TYPE HERE**  
I hereby request the ballot type marked below for this election. (You must select one ballot type below. If you do not select a ballot type, a ballot will not be issued to you.)

**SELECT ONLY ONE BALLOT TYPE:**

Democratic Party Presidential Primary Ballot

Republican Party Presidential Primary Ballot

Ballot without Presidential Primary (if available). Note: This ballot choice is for voters not voting in the presidential primary who wish to vote on other propositions/candidates (if on ballot).

The Application to Vote has been modified to record the voter's ballot type selection for the Presidential Primary. The voter must complete the SELECT BALLOT TYPE HERE section to receive a ballot. If the voter refuses to check a box in this section, a ballot **CANNOT** be issued.

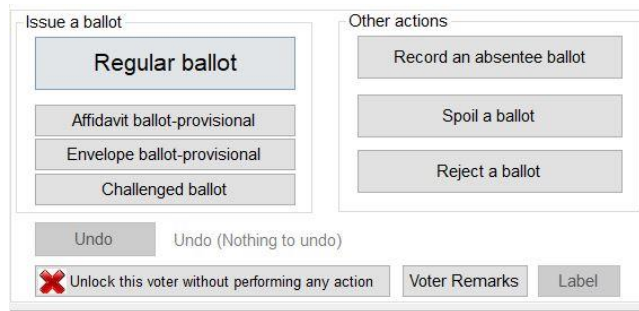
### Assigning a Ballot in the Electronic Pollbook

1. Swipe the voter's driver's license through the magnetic card reader, scan the barcode on the driver's license, or type the voter's name into the DLN/Name field. If typing, select the correct voter and select "Lock this voter record."

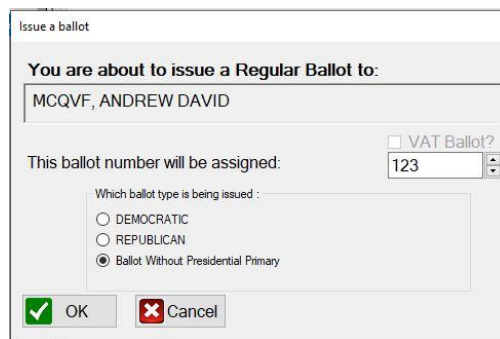




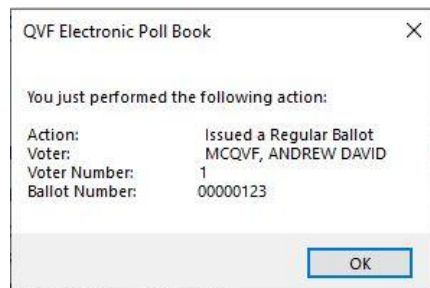
2. Verify that the voter's information provided on the Application to Vote is the same as the information in the EPB. When this verification is complete, select regular ballot (or Envelope ballot - provisional or Challenged ballot, if applicable).



3. Find the next available ballot of the voter's selected ballot type and **carefully type** that ballot number in the ballot number box.
4. Select which ballot type the voter requested.
5. Select OK.



(If the confirmation is enabled, the ballot number and ballot type recorded will display in the confirmation screen. Select OK to continue processing the next voter.)



Complete the ELECTION INSPECTOR COMPLETES portion of the Application to Vote with the election inspector's initials, the ballot style type, ballot number and voter number.

**Application to Vote/Ballot Selection Form**

Photo ID must be shown unless it's not in the voter's possession. A voter without photo ID may instead complete the *Affidavit of Voter Not in Possession of Photo ID* below and vote a regular ballot.

February 27, 2024 Presidential Primary Precinct \_\_\_\_\_

<div style="border: 2px solid red; padding: 5px;"><b>ELECTION INSPECTOR COMPLETES</b> <input type="checkbox"/> ID AFFIDAVIT COMPLETED ELEC. INSP. INITIAL _____ BALLOT STYLE _____ BALLOT NO. _____ VOTER NO. _____</div>	<p>PRINT NAME: _____</p> <p>DATE OF BIRTH: _____</p> <p>RESIDENCE ADDRESS: _____</p> <p>I certify that I am a United States citizen and a registered and qualified elector in this precinct, and hereby make application to vote at this election.</p> <p>SIGN HERE  _____ X SIGNATURE OF VOTER</p>	<p><b>SELECT BALLOT TYPE HERE</b> I hereby request the ballot type marked below for this election. (You must select one ballot type below. If you do not select a ballot type, a ballot will not be issued to you.)</p> <p><b>SELECT ONLY ONE BALLOT TYPE:</b></p> <p><input type="checkbox"/> Democratic Party Presidential Primary Ballot</p> <p><input type="checkbox"/> Republican Party Presidential Primary Ballot</p> <p><input type="checkbox"/> Ballot without Presidential Primary (if available). <small>Note: This ballot choice is for voters not voting in the presidential primary who wish to vote on other proposals or candidates (if on ballot.)</small></p>
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If absent voter ballots are processed in the precinct, the Ballot Type recorded will show along with the Ballot Number assigned by the clerk in QVF.

Note: If the wrong ballot type is selected in the EPB, the election inspector must go back into the voter's record, select undo, and repeat the steps above selecting the correct ballot type.

## Changing the Ballot Type

If the voter decides they want a different ballot type after a ballot has been issued, the voter must change his or her Application to Vote and the new ballot should be processed under the normal spoiled ballot procedures. The voter should initial their correction, and the inspector should correct the ballot style/type and ballot number.

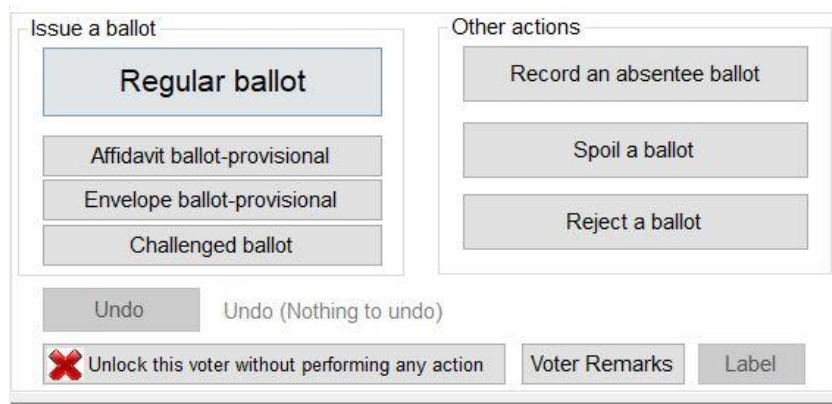


# Spoiling a Ballot

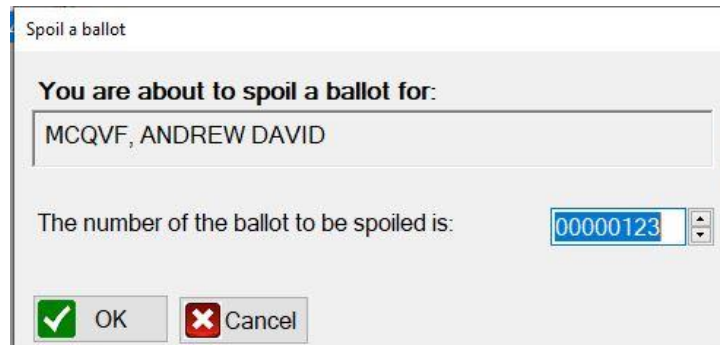
1. Swipe the voter's driver's license through the magnetic card or type the voter's name into the DLN/Name field. If typing, select the correct voter and then you must select "Lock this voter record."



2. Select Spoil a Ballot.



3. Confirm the ballot number being spoiled and select OK.



4. "Lock this voter record" again.





5. Select the button for the kind of ballot being issued: regular ballot (or Provisional (envelope) or Challenged ballot if applicable).

Issue a ballot

Regular ballot

Affidavit ballot-provisional

Envelope ballot-provisional

Challenged ballot

Other actions

Record an absentee ballot

Spoil a ballot

Reject a ballot

Undo Undo (Nothing to undo)

✖ Unlock this voter without performing any action Voter Remarks Label

6. Record the next available ballot number for the ballot type selected and the ballot type.
7. Select OK.

Issue a ballot

You are about to issue a Regular Ballot to:

MCQVF, ANDREW DAVID

VAT Ballot?

This ballot number will be assigned: 1051

Which ballot type is being issued :

DEMOCRATIC

REPUBLICAN

Ballot Without Presidential Primary

OK  Cancel



## Voter Tabulation of AV Ballots on Election Day

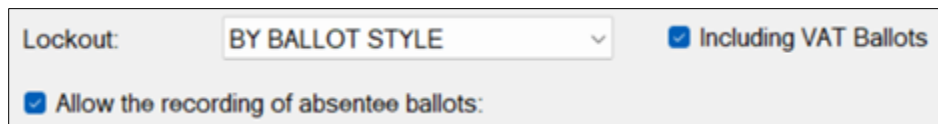
Beginning at the February 2024 Presidential Primary, voters will be able to cast their absentee voter (AV) ballots at in-person early voting sites and Election Day polling places.

The Early Voting Electronic Poll Book will have a "Convert Absentee Voting to Early Voting" button to easily allow election inspectors to record this voter action. However, due to the intensive software development of the Early Voting EPB, this button will **not** be present in the Election Day EPB until after the February election.

This section of the guide provides the procedure that election inspectors should use when recording voters tabulating their AV ballots in the precinct, **only for the February 27<sup>th</sup>, 2024 election**. This will allow for proper ballot recording, as well as for ensuring that the EPB ballot summary may be utilized to balance at the end of the night.

### EPB Download Options

If the option to allow the recording of absentee ballots was not selected in QVF before downloading the EPB, this setting can be turned on in the EPB by selecting "File" and "Options".



The screenshot shows a software interface with a "Lockout:" label, a dropdown menu set to "BY BALLOT STYLE", a checked checkbox for "Including VAT Ballots", and another checked checkbox for "Allow the recording of absentee ballots:".

### Issuing Ballot in EPB

When a voter brings their AV ballot to the election day polling place and wishes to tabulate it, they should be directed to fill out an "Application to Vote" like all other in-person voters. After the voter verifies their photo ID or signs the affidavit of voter not in possession of photo ID, take the following steps in the EPB:

1. Search for the voter's last name in the search bar or scan their driver's license (if available).
2. Select "Lock Voter Record".
3. Ask the voter to carefully expose only the numbered stub of their AV ballot and confirm that the number on the stub matches the number in the "Absentee Ballot sent" status flag in that voter's EPB record.



Issue a ballot

Regular ballot

Affidavit ballot-provisional

Envelope ballot-provisional

Challenged ballot

Other actions

Record an absentee ballot

Spoil a ballot

Reject a ballot

Undo

Undo (Nothing to undo)

✘ Unlock this voter without performing any action

Voter Remarks

Label

Absentee Ballot [00010001] sent by clerk--Voter must surrender ballot or submit affidavit.

VOTING STATUS: Did not vote in precinct.

(If the voter’s absentee ballot is missing a stub, the stub is detached, or if the ballot number does not match, the voter must surrender the ballot and be given a new ballot by the election inspector. Procedures for surrendering AV ballots are listed in the *Election Inspector Procedure Manual*.)

4. Once the ballot number is verified and recorded on application to vote, select “Voter Remarks” in EPB, and type “AV to ED.” This will document the conversion on the Remarks page for later reference.

02/27/2024 - PRESIDENTIAL PRIMARY - [REDACTED]

Precinct 00005

## REMARKS

Date / Time	User	Voter #	Voter Name	Remarks
[REDACTED]	[REDACTED]	5	[REDACTED]	AV to ED

5. Under “Issue a Ballot”, select “Regular Ballot”

\*\*\*Do **not** select “Record an absentee ballot” in this case. This is only to be used by jurisdictions which are having election inspectors process AV ballots sent to the election day precinct by the clerk, and **not** in the cases where the voter is bringing their own AV ballot to place into a tabulator. \*\*\*



6. For the "Ballot Number", delete the number in the space (if auto advance is enabled) and enter the AV ballot number, but add **V** to front of the number. (ex. AV ballot 10001 should be marked as Ballot V10001).
7. Select the political party ballot indicated on their "Application to Vote" or that corresponds with ballot number issued.
8. Select "OK"

If a voter wishes to surrender their AV ballot and vote a regular in-person ballot, the election inspector should follow the procedure for surrendering AV ballots as listed in the *Election Inspector Procedure Manual*. If the ballot number cannot be verified (requiring the ballot to be surrendered), election inspectors should also contact the clerk's office to ensure that the absentee ballot is rejected in QVF.

## Reminder: Recording AV Ballots Processed in the Precinct by Election Inspectors

When absentee ballots are sent by the clerk to the precinct to be processed by election inspectors into the election day tabulators, **only then** should election inspectors use the "Record an Absentee Ballot" button.





### III. Ballot Summary

The Election Day EPB Ballot Summary has not changed for the 2024 Presidential Primary. The Presidential Primary ballot types should be recorded the same way as multiple ballot styles (for example, two or three school districts in one precinct).

Each ballot type is entered on one line in both "A. Number of ballots delivered to precinct" and "J. Number of UNUSED BALLOTS". **Use the Tab key to create a new line.** Remember, the ballot style line will not calculate until after the cursor is on a new line and/or in a different box.

Use the following steps to account for the AV ballots brought by voters to tabulate in the ballot summary when closing the polls.

1. Line A:

- a. List the starting and ending numbers of unvoted ballot stock that was sent to the election day polling place. (As a reminder, ballots for the different presidential primary party ballots (Democratic, Republican, and Local, if available) should use different numbering sequences. Utilize the tab key to calculate and add additional rows needed. An example is listed below:
  - i. D=10001 to 11000
  - ii. R=20001 to 21000
  - iii. L=30001 to 31000
- b. After the rows of your regular election ballot stock, enter a final row with ballot style "V", and party "AVED" (short for "Convert **A**bsent **V**oting to **E**lection **D**ay) to record any AV ballots brought in by voters to be tabulated by voters in the precinct.
- c. Use the "List of Voters" to count the number of AV ballots that were tabulated by voters (indicated by a "V" in the ballot number), and if used, these AVED notations will be on the Remarks Report.
- d. In "Starting No.", type "V0001", and in "Ending No.", type "V" followed by the number of AV-ED ballots tabulated by voters.
  - i. (In the below example, only 3 AV ballots were tabulated by voters, so the "Starting No." is "V1", and the "Ending No." is "V3".)



**NUMBER OF BALLOTS DELIVERED TO PRECINCT:**

A. Number of unvoted official ballots delivered to precinct:

Ballot Style	Party	Starting No.	Ending No.
██████████	D	00010001	00011000
██████████	L	00030001	00031000
██████████	R	00020001	00021000
V	AVED	V0000001	V0000003

- 2. Line B is how many AV return envelopes received by board. This should **only** be used by jurisdictions having election inspectors process AV ballots in the precinct. Otherwise, this should be 0 or not available as an option to fill.

B. Number of absentee voter return envelopes received by board:

- 3. Adding Lines A and B should equal C.
- 4. Enter Numbers for Line D using the number on the Tabulator Public Counter.
- 5. Enter numbers for Lines E - I, as normal. Some of these lines will be auto filled depending on action taken in EPB throughout the day.

**NUMBER OF BALLOTS AT CLOSE POLLS:**

D. Number of ballots tabulated:

E. Number of AV ballot envelopes delivered to precinct which did not contain a ballot or were not processed for any reason:

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

G. Number of ballots rejected:

H. Number of ballots used by election inspectors for ballot duplications:

I. Number of provisional envelope ballots issued:

- 6. In Line J enter the Number of UNUSED ballot stock for each ballot type.



- a. The starting number should be the **next** ballot to be issued, and the ending number should be the last number of the ballots sent to the precinct.
- b. (In this example, 150 ballots of each type were issued, so the "Starting No." would be the next ballot to be issued, Ballot #151. And the ending number here would be the same as the ending number in Line A.)
  - i. D=10151 to 11000
  - ii. R=20151 to 21000
  - iii. L=30151 to 31000

J. Number of UNUSED BALLOTS (excess ballots):

Ballot Style	Party	Starting No.	Ending No.	Count
■	D	00010151	00011000	850
■	L	00030151	00031000	850
■	R	00020151	00021000	850
				2550

**Do not add a final line for the "V" ballot style, this section only counts *unused* ballot stock.**

7. Ballot Summary Line L must equal '0'. The inclusion of the "V" ballots representing the AV to ED ballots tabulated by voters should balance with the tabulator count reflecting ballots that were not issued from election day stock.

<b>L. Difference:</b>	0
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If Line L does **not** equal 0:

- Check that the correct number of AV-ED ballots were accounted for.
- Check remarks for any ballot recording issues throughout the day that could account for the discrepancy other than AV to ED Conversion (e.g. AV ballots left in envelopes, but recorded in EPB or on AV List, any abandoned ballots that couldn't be attributed to a specific voter, a spoiled yet unissued ballot).

If this still cannot be resolved during closing, leave a general remark in the electronic poll book, and contact your local clerk.





# IV. List of Voters

When saving the *List of Voters*, AV ballots tabulated in person by voters should be identifiable by the "V" in front of the ballot number:

02/27/2024 - PRESIDENTIAL PRIMARY - [REDACTED]  
 PRECINCT [REDACTED]

### LIST OF VOTERS

#	Voter Name	Ballots	Remarks
1	[REDACTED]	00010001	
2	[REDACTED]	00020001	<b>1</b>
3	[REDACTED]	00030001	
4	[REDACTED]	00020002	
5	[REDACTED]	V0020006	<b>2</b>
6	[REDACTED]	V0020007	
7	[REDACTED]	00010002	
8	[REDACTED]	00020008	Absentee Ballot <b>3</b>
9	[REDACTED]	00020140	
10	[REDACTED]	V0010001	
11	[REDACTED]	00010235	Absentee Ballot <b>3</b>

1. Regular Ballots highlighted in **red**.
2. AV ballots brought by voters to tabulate on election day marked in **green** and indicated by the "V" in front of the ballot number.
3. AV ballots sent to the precinct for election inspectors to process marked in **blue**.

