ClearAccess™ User's Guide

Version 3.0

Clear Ballot

ClearAccess User's Guide

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Preface

ClearAccess™ is an accessible voting and ballot marking application that allows voters with sight or mobility limitations to vote in an unassisted manner. The software runs on a touchscreen computer installed with an EZ Access keypad and Breeze™ Sip-and-Puff device. The voter may make ballot selections either by touching the monitor, pressing buttons on the keypad, or using the Sip-and-Puff. Ballot selections may be presented on the computer's display, played back over audio headphones, or presented both on the screen and in audio format. Once the voter has finished voting, selections are printed to a paper ballot.

Election and ballot information recognized by ClearAccess is configured in the ClearDesign™ software. This information is programmed to a unique set of election media (typically a USB stick) for every voting location, then installed on the respective ClearAccess unit.

✔ ClearAccess is fully accessible, allowing disabled voters to configure, navigate and vote the ballot in an unassisted manner.

✔ ClearAccess is used to vote and mark ballots with voter selections, but is not used to count, tally or report race or candidate totals.

Audience and scope

This guide is intended for election officials using ClearAccess as an accessible voting solution.

Using this guide

The guide describes ClearAccess voting functionality, user roles and election states.

Chapter 1. ClearAccess Overview

Describes logging into and out of the application, as well as shutting down.

Chapter 2. Roles

Details application user roles.

Chapter 3. EZ Access keypad

Describes EZ Access keypad usage.

Describes Breeze Sip-and-Puff usage.

Describes how an election is loaded in ClearAccess

Describes ClearAccess Pre-Election functionality.

Details all aspects of voting using the Touchscreen.

Details all aspects of voting using the EZ Access Keypad.

Details all aspects of voting using the Breeze Sip-and-Puff.

Steps through ClearAccess election day usage.

Describes the functionality used by ClearAccess to close the election.

Describes ClearAccess audit functionality.

Provides a list of terms and definitions used by ClearAccess and other Clear Ballot products.

Describes the application's Setup Mode.

Notation conventions

The following conventions are used in this manual:

Convention	Purpose
Bold	Denotes clickable selections on web pages and dialogs.
Italics	Denotes placeholders for user-defined values.
Monofont	Denotes product keywords and system commands.
✓	Indicates noteworthy information.

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Chapter 1. ClearAccess Overview

The overview of ClearAccess™ includes the following topics:

- ClearAccess configuration
- Launching ClearAccess
- Roles
- Election mode
- Testing voting
- Ballot selection
- Ballot configuration
- Voting instructions
- Ballot content
- Overvoting/undervoting
- Ballot presentation options
- Ballot review
- Ballot printing
- Audit
- Logging out
- Shutting down

1.1 ClearAccess configuration

The ClearAccess unit should be configured with a:

- Printer to print voted ballots
- EZ Access keypad to allow vision-impaired voters to input ballot selections
- Audio headphones to allow vision-impaired voters to listen to audio ballot playback
- Breeze Sip-and-Puff device to allow mobility-impaired voters to input ballot selections

1.2 Launching ClearAccess

Powering ClearAccess on presents a log in screen corresponding to the current election state. ClearAccess functionality is then determined by the role the application is accessed with and the current election mode.

If no election has been loaded, use the Administrator role to load an election and select the desired vote center.

1.3 Roles

ClearAccess functionality varies according the user's role. ClearAccess roles include:

- Administrator — used for administrative purposes, allowing the user to load and unload elections, configure the ClearAccess unit, and change the maintenance and administrator passwords
- Election — used to test, prepare as well as close the election
- Pollworker — used by pollworkers to open and close the polls as well as troubleshoot ballot printing issues
- Voter — used by the pollworker to provide the voter access to the ClearAccess ballot
- Maintenance — used to perform background configuration and maintenance tasks

1.4 Election mode

ClearAccess uses the following election modes:

- No Election – no election is loaded
- Pre-Election – mode used to test voting functionality prior to election day
- Election – pre-election testing has been completed
- Polls Open – unit is in live voting mode
- Post-Election – polls have closed and post-election administrative functions may be performed

1.5 Testing voting

Voting may be fully tested in Pre-Election mode. All ballot content, navigation and selection functionality available in live election mode is also available in Pre-Election mode.

1.6 Ballot selection

Only the ballots supported at a particular voting location will appear in ClearAccess. The configuration of precincts and ballot types allowable at a voting location is performed in ClearDesign™. Each ballot is listed on the **Select Ballot** screen by precinct, split and party (in case of a closed primary), in addition to an internally-generated ballot number. If the list of ballot types does not fit into a single screen, a vertical scroll bar appears on the right-hand side of the ballot list for navigation purposes.

1.7 Ballot configuration

The ballot may be presented to the voter either on the touchscreen in visual format, played back to the voter over headphones in audio format, or both. The voter may input ballot selections using either the touchscreen, the EZ Access keypad or Breeze Sip-and-Puff. The voter may choose to vote using any input and presentation combination. Visual and audio ballots are presented with the same ballot content (other than voting instructions, which are different for visual and audio ballots).

For more information on voting ClearAccess using the:

- Touchscreen, refer to *Voting using the Touchscreen*
- EZ Access Keypad, refer to *Voting using the EZ Access Keypad*
- Breeze Sip-and-Puff, refer to *Voting using the Breeze Sip-and-Puff*

1.8 Voting instructions

Each ballot is prefaced in ClearAccess with detailed voting instructions, presented either in written or in audio format, depending on the ballot presentation requested. These instructions may also be repeated at the voter's convenience in the course of voting.

The voter may select no more candidates or responses than the number to vote for in any particular race. It is not necessary to vote in every race — simply advance to the races you wish to vote in.

1.9 Ballot content

Races appear on the ballot in sequence, the heading information of each race preceding the corresponding candidates listed in sequence. In case of questions, the text is followed by the associated responses, typically positive and negative. The ballot is navigated in a linear manner, either advancing to the next race or returning to the preceding race.

The selection of party in an open primary election limits the races presented on the ballot to those endorsed by the selected party in addition to the non-partisan races.

Selecting a party in a straight party race will automatically choose all candidates endorsed by that party in straight party votable races in a general election. The voter may override straight party-voted candidates with alternate selections, as long as the number to vote for is not exceeded.

An election may be configured with the option of allowing the manual entry of write-in candidates. Write-in candidates are not registered to run in a particular race, and may be added up to and including the number to vote for.

1.10   Overvoting/undervoting

It is not necessary to select the number of candidates to vote for in a race — you may select the number of candidates to vote for or less, but never more than the number of candidates to vote for. The election may be configured in ClearDesign to display a warning message when a race is undervoted.

It is not possible to overvote, either on a visual or audio ballot. To vote for an additional candidate once the number of candidates to vote for has been selected, you must de-select one of the existing choices first, then proceed to select the desired candidate. The election may be configured in ClearDesign to display a warning message when an attempt is made to overvote a race.

1.11   Ballot presentation options

ClearAccess offers a Settings function that allows the voter to customize ballot presentation options at any point in the voting process. The following may be customized in Settings:

- Ballot presentation language
- Ballot magnification
- Ballot color options
- Audio ballot presentation
- Visual ballot presentation

1.12   Ballot review

At the completion of voting, the voter reviews the candidate and response selections made on the ballot. The voter may jump directly to any race on the ballot, make the desired changes to candidate/response selections, then return directly to ballot review.

1.13   Ballot printing

At the conclusion of voting, the ballot is printed. All selections printed to the paper ballot will be identical to those made in ClearAccess. Once the ballot has been printed, it is taken in a secrecy sleeve to the designated ballot box.

While touchscreen and printed ballot formatting may differ, all meaningful ballot content will be identical, including races, candidates and question responses.

> The printed ballot does not contain any identification information linking the ballot to the voter's identity or method of voting.

1.14   Audit

Significant operation, configuration and maintenance transactions in ClearAccess are posted to one of two audit logs. Election-specific transactions that occur while an election is loaded are posted to the election audit log, while system-specific transactions are posted to the system audit log at any point during ClearAccess usage. Transactions are posted to the system audit log, whether an election has been loaded or not.

1.15   Logging out

When you have finished using ClearAccess, you may log out of the application. The menu of every election mode features a Logout function—by touching this button, ClearAccess returns to the log in screen, and is ready to be accessed for another session.

1.16   Shutting down

When you have finished using the ClearAccess unit for the day, the unit should be shut down using the **Shutdown** option. This option is featured on every ClearAccess menu.

> At the end of every early voting day, ClearAccess should be shut down, but the polls not closed. The polls should only be closed in ClearAccess at the end of election day.

Chapter 2. Roles

ClearAccess™ roles include:

- Voter—used by the pollworker to provide the voter access to the ClearAccess ballot
- Election—used to test and prepare the election for voting
- Pollworker—used by pollworkers to open and close the polls
- Administrator—used for administrative purposes, allowing the user to load and unload elections, configure the voting machine, and change the maintenance and administrator passwords
- Maintenance—to perform background configuration and maintenance tasks

2.1 About

ClearAccess is accessed by means of one of a number of user roles — each role determines the functionality and election modes available to the user. The password must be a minimum of one alphanumeric character, and must be prefaced by a single letter code corresponding to the role being used to access the system. The:

- Administrator password is prefaced with 'a'
- Election password with 'e'
- Maintenance password with 'm'
- Pollworker password with 'p'
- Voter password with 'v'

While these codes are necessary to log into ClearAccess, they are not considered part of the password itself.

The same password may be used for different ClearAccess roles, and yet prefaced with a different role-related code will access the functionality corresponding to that role.

The Election, Pollworker and Voter roles are defined in ClearDesign, while the Maintenance and Administrator passwords default to '0000' and '1111,' respectfully. The Maintenance and Administrator passwords should be changed in ClearAccess. Only the Administrator role is allowed to change these passwords.

2.2 Voter

The Voter role is used by the pollworker to provide the voter access to the ClearAccess ballot. The voter ID is created in ClearDesign and must be prefaced with a 'v' when used to log on to ClearAccess.

The code is entered by the pollworker, who then selects the precinct/split that identifies the voter's ballot, in addition to the party in case of a closed primary election. The only functionality in ClearAccess available to the voter role is voting the ballot—once the ballot has been voted and printed, ClearAccess returns to the log in screen, where the pollworker enters the Voter ID when the next voter is ready to vote.

2.3 Election

The Election role is used by the election administrator to test the election and prepare the election for voting. The Election role is accessed by logging in using an Election role, which is created in ClearDesign, and must be prefaced with a 'e' when used to log on to ClearAccess.

The Election role is valid in Pre-Election, Election, Polls Open and Post-Election modes.

You may only access an election in ClearAccess using the Election role once the election has been loaded onto the system by an Administrator. Once an election has been closed, it may only be accessed by a user with an Administrator role.

2.3.1 Pre-Election mode

The Election role accesses the following functions in Pre-Election mode:

- **Test Vote**—used to test ballots
- **Set for Election**—used to set the election to Election mode once all pre-election testing has been completed
- **Close Election**—used to close the election
- **Logs**—used to display audit logs
- **Shutdown**—used to shut down the ClearAccess station
- **Logout**—used to exit the current election and return to the main menu

2.3.2 Election mode

The Election role accesses to the following functions in Election mode:

- **Open Poll**—used to open the polls and allow voting to begin
- **Logs**
- **Shutdown**
- **Logout**

2.3.3 Polls Open mode

The Election role accesses the following functions in Polls Open mode:

- **Resume Voting**—allows voting to resume
- **Close Poll**—used to end the election at the end of election day
- **Logs**
- **Shutdown**
- **Logout**

2.3.4 Post-Election mode

The Election role accesses to the following functions in Post-Election mode:

- **Re-Open Polls**—sets the election to resume voting
- **Close Election**—once all administrative tasks pertaining to the election have been completed, the election may be closed
- **Logs**
- **Shutdown**
- **Logout**

2.4 Pollworker

The Pollworker role is used by pollworkers to open and close the polls, as well as to assist the voter in the event of ballot printing challenges. The Pollworker ID is created in ClearDesign and must be prefaced with a 'p' when used to log on to ClearAccess.

On election day, once the ClearAccess unit has been readied for use and voting may begin, the pollworker logs on and opens the polls. At the end of election day, the pollworker logs on to ClearAccess again to close the polls.

The Pollworker role is not usable prior to the election having been set to Election mode, and is no longer usable once the election has been closed.

2.4.1 Election mode

The Pollworker role accesses to the following functions in Election mode:

- **Open Poll**—used to open the polls and allow voting to begin
- **Logs**—used to display audit logs
- **Shutdown**—used to shut down the ClearAccess station
- **Logout**—used to exit the current election and return to the main menu

2.4.2 Polls Open mode

The Pollworker role accesses to the following functions in Polls Open mode:

- **Resume Voting**—allows voting to resume
- **Close Poll**—selected to end the election at the end of election day
- **Logs**
- **Shutdown**
- **Logout**

2.4.3 Post-Election mode

The Pollworker role accesses the following functions in Post-Election mode:

- **Re-Open Polls**—sets the election to resume voting
- **Logs**
- **Shutdown**
- **Logout**

2.5 Administrator

The Administrator role is used to load and unload elections, configure the voting machine, and change the Maintenance and Administrator passwords. The Administrator role is created in ClearDesign and must be prefaced with an 'a' when used to log on to ClearAccess. While the Administrator password initially defaults to '1111', it should be changed to a unique value.

Prior to using ClearAccess, the voting machine should be configured with the correct system date, time, and time zone, the printer defined to the system, and the Administrator and Maintenance passwords updated. To perform the setup, the Administrator logs in with the corresponding role ID, then selects the **Setup** option.

In order for an election to be configured for voting in ClearAccess, it must be loaded, which is available only to the Administrator role. Once the election has been loaded, testing and election preparation should be performed using the Election role, and not the Administrator role. Once the election has been loaded, invoking the Administrator role will allow configuration information to be updated and the election to be closed.

> ✓ Be sure to create a unique Administrator password, rather than using the system default. Ensure that a reliable and secure password tracking mechanism is in place if you assign a unique Administrator password to each ClearAccess unit.

> ✓ While the ClearAccess application Administrator password is intended to provide access to ClearAccess administrative functions, the Windows Administrator password provides access to Windows administrative functions on the ClearAccess station.

The Administrator role accesses the following functions in Load Election mode:

- **Open Election**—used to load the desired election file
- **Logs**—used to display audit logs
- **Setup**—used to enter background configuration information
- **Shutdown**—used to shut down the ClearAccess station
- **Logout**—used to exit the current election and return to the main menu

Once the election has been loaded, logging on to ClearAccess using the Administrator role displays the following menu options:

- **Close Election**—allows the election to be closed
- **Logs**
- **Setup**
- **Shutdown**
- **Logout**

2.6 Maintenance

The Maintenance role is used to perform background configuration and maintenance tasks. The Maintenance role ID defaults to '0000' and must be prefaced with an 'm' when used to log on to ClearAccess. However, the password should be changed to a unique value when the ClearAccess station is being configured.

The Maintenance role may be used to access ClearAccess at any point and includes the following functions:

- **Logs**—used to display audit logs
- **Setup**—used to enter background configuration information
- **Shutdown**—used to shut down the ClearAccess station
- **Logout**—used to exit the current election and return to the main menu

Chapter 3. EZ Access Keypad

The EZ Access keypad used with ClearAccess™ features the following buttons:

- Enter
- Next/previous item
- Next/previous page
- Help
- Settings
- Shift

3.1   Enter

- green round button
- used to select- or deselect a choice
- pressed once to make a choice (such as a candidate selection), and pressed again to de-select the choice
- located at the bottom, right-hand side of the keypad

3.2   Next/previous item

- two yellow triangular buttons
- the lower button is used to move to the next item in a list (such as the next candidate)
- the upper button is used to move to the previous item
- located at the bottom center of the keypad

3.3   Next/previous page

- two white arrow buttons
- the right arrow button is used to move to the next ballot page
- the left arrow button is used to move to the previous page
- holding the left button down for more than one second allows you to cancel the voting session
- holding the right button down for more than one second takes you to the review page
- located on the left- and right-hand sides of the center of the keypad

3.4 Help

- blue diamond-shaped button
- features a question mark and raised bump in its center
- used to access help at any time
- located at the top center of the keypad

3.5 Settings

- red rectangular button
- used to access the **Setting** page
- located at the top, right-hand side of the keypad

3.6 Shift

- black rectangular button
- acts as a shift key
- located at the top, left-hand side of the keypad
- when depressed at the same time as any of the following, changes the buttons to control audio play volume and speed as follows:
    - the yellow triangular up button increases playback volume
    - the yellow triangular down button decreases playback volume
    - the white left arrow button slows the speech rate down
    - the white right arrow button increases the rate of speech playback
    - the green round select button pauses or resumes speech playback
    - the red top right-hand button skips to the next sentence
    - the blue diamond-shaped button at the top skips to the previous sentence
- The effect of these buttons starts with the next sentence spoken.

Chapter 4. Breeze Sip-and-Puff

The Breeze Sip-and-Puff device allows the user to make choices by means of a simple sip, a simple puff, a long sip, a long puff, a double sip, a double puff, or a triple sip or puff. The long sip or puff is about half a second long, and a double sip or puff comprises two simple sips or puffs separated by no more than a quarter second. Individual sips or puffs in a sequence of three should also be separated by no more than a quarter second.

Sip and puff functionality is as follows:

- a single puff advances the ballot to the next item, while a single sip moves to the previous item
- a long puff selects or de-selects a choice, while a long sip re-displays the voting instructions
- a double puff moves to the next page, while a double sip moves to the previous page
- a triple puff displays the **Settings** page, while a triple sip allows you to cancel the voting session

Use either sip or puff to move between the instructions, contest titles and list of choices. A blue box outlines the current item—to select this item, make a long puff to select that choice. When the item has been selected, the box will turn blue. If you want to change your selection, move to the choice you no longer want and do a long puff to de-select—the box will then turn white. To vote for a candidate not on the ballot, select the write-in option—you will get more instructions on how to complete the write-in.

Chapter 5. Loading an Election

Once the ADF file has been downloaded to election media, the media is installed on the ClearAccess™ unit, and election and vote center information contained in the ADF loaded into ClearAccess.

1. Identify the USB port to be used for loading the election.

2. Record the seal number attached to the port, then remove the seal.

3. Insert the USB flash drive loaded with the ADF into the designated USB port.

4. Log on using the Administrator role.
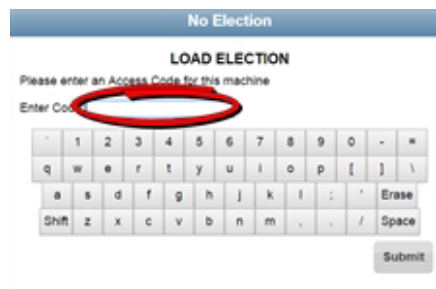

Figure 5-1. Logging on as Administrator

5. In the **Load Election** menu, touch the **Open Election** button.

Figure 5-2. Opening the election

6. Select the desired election from the list displayed in the **Elections** window. The elections that have been loaded onto the media downloaded from ClearDesign are displayed here.
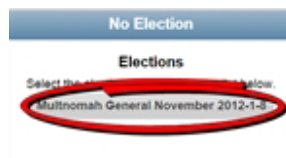
Figure 5-3. Selecting the election

7. Log on using the Election access code in the **Open Election** menu.

Figure 5-4. Logging on to access election

8. If election media has been created with multiple vote centers, touch the button corresponding to the desired vote center in the subsequent screen.
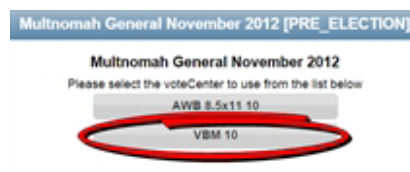
Figure 5-5. Selecting the vote center

9. The **Election Preparation** menu now appears.
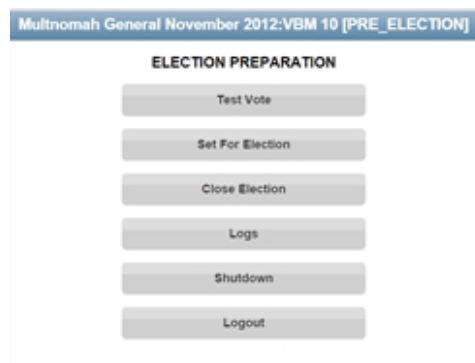
Figure 5-6. Election preparation menu

10. When the election has been successfully loaded, the USB flash drive containing the ADF should be removed from the port. A new seal should be attached to the port and the seal number recorded.

Chapter 6. Pre-Election Mode

ClearAccess™ ballot testing takes place in Pre-Election mode. When all ballot testing has been completed, the election is set to Election mode.

The **Election Preparation** menu offers the following options:

- Test Vote
- Setting ClearAccess to Election mode
- Close Election
- Logs
- Shutdown
- Logout

6.1 Test Vote

The **Test Vote** function is used to test ballots in ClearAccess. Comprehensive ballot testing should be performed on every ClearAccess unit prior to the election.

Prior to voting a test ballot, select the ballot style in addition to the ballot input and presentation method.

1. Select the **Sound On** check box if the audio ballot is to be played back

2. Select the **Screen On** check box if ballot is to presented in visual format

3. In **Preferred Input Type**, select one of the following:

   - **Screen** if ballot selections are to be made using the touchscreen
   - **Keypad** if ballot selections are to be made using the EZ Access keypad
   - **Sip & Puff** if ballot selections are to be made using the Breeze Sip-and-Puff

4. Select the desired ballot style from the precinct list

Figure 6-1. Ballot selection screen

6.2 Setting ClearAccess to Election mode

Once pre-election testing has been completed, ClearAccess™ must be set to Election Mode:

1. Log onto ClearAccess using the Election role.

Figure 6-2. Election Preparation log in screen

2. In the **Election Preparation** menu, touch the **Set for Election** button.

Figure 6-3. Setting for election

3. Touch the **OK** button in the confirmation prompt.

Figure 6-4. Setting for election confirmation

4. The **Set for Election** menu is now displayed. Touch the **Logout** button to log out.
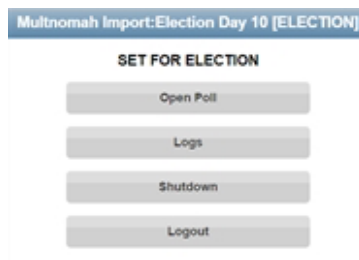
Figure 6-5. Set for Election menu

6.3   Close Election

It is possible to close the election in Pre-Election mode, which effectively unloads the election from the system. However, the election may be reloaded again into ClearAccess as necessary.

1. Touch the **Close Election** button in the **Election Preparation** menu
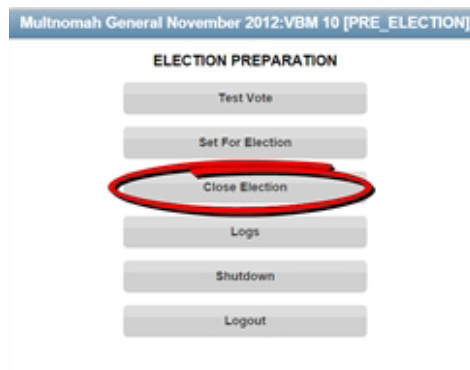
Figure 6-6. Closing the election

2. Touch the **Okay** button in the confirmation message.
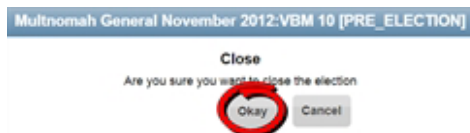
Figure 6-7. Election closing confirmation message

3. The **Load Election** menu is now displayed.
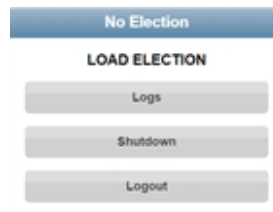
Figure 6-8. Load Election menu

6.4 Logs

The system and election logs may be displayed at any time by touching the **Logs** button in the **Election Preparation** menu. For more information on ClearAccess audit logs, refer to *Chapter 12. Audit*.

6.5 Shutdown

Use the **Shutdown** menu option to power off the ClearAccess unit.

> ✓ At the end of every early voting day, ClearAccess should be shut down, but the polls not closed. The polls should only be closed in ClearAccess at the end of election day.

1. Touch the **Shutdown** button in the **Election Preparation** menu
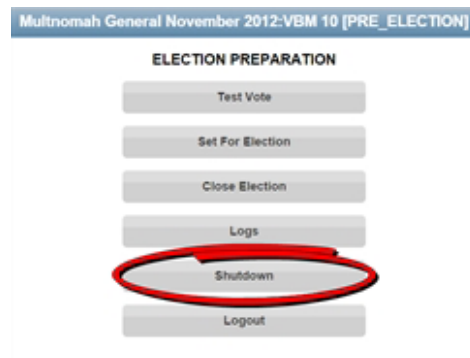
Figure 6-9. Shutting down ClearAccess

2. Touch the **Okay** button in the confirmation message.
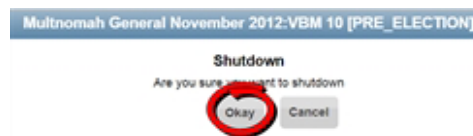
Figure 6-10. Shutdown confirmation message

The ClearAccess unit will now be powered off.

6.6 Logout

Touch the **Logout** button in the **Election Preparation** menu. ClearAccess will return to the **Election Preparation** log in screen.

Chapter 7. Voting using the Touchscreen

This chapter describes ballot presentation and ballot selections using the touchscreen.

Voting using the touchscreen involves the following topics:

7.1 Language selection

The first step in voting involves the selection of ballot presentation language. If the election has been defined in ClearDesign™ with only one language (ie. English), then no language selection is presented in ClearAccess™.

Touch the button corresponding to the desired language to display all race, candidate and heading text on the ballot in the specified language.

Select your language from the list below
Select your language from the list below

Press here to vote in English.

Presione aquí para votar en español.
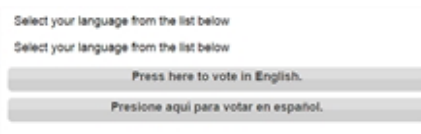
Figure 7-1. Selecting the ballot language

7.2 Party selection

If the election is a closed primary, then the language selection screen is followed by a party selection screen. The voter selects the desired party, limiting the races presented on the ballot to those endorsed by the given party in addition to non-partisan races. This screen is not presented to the voter if the election is not a closed primary.

7.3 Voting instructions

Following the language selection screen, a page with voting instructions is displayed, describing the manner in which a candidate is selected and write-in candidate created.
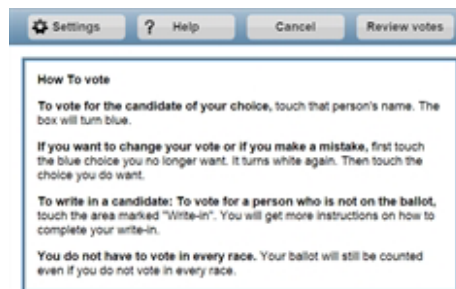
Figure 7-2. Voting instructions

Touch the **Next** button to advance to the next ballot page.

You may redisplay voting instructions at any time during voting by touching the **Help** button on the ballot toolbar. Once you have finished reviewing voting instructions in the **Help** screen, touch the **OK** button to return to the ballot.
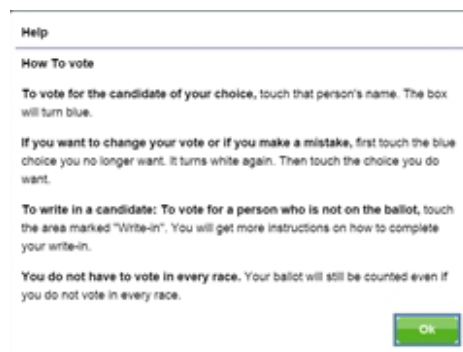
Figure 7-3. Ballot help

7.4   Ballot header

The subsequent page displays ballot header information, including the date of the election and the districts applicable to the ballot. The information displayed on the ballot heading screen is taken from election configuration information defined in ClearDesign.

Touch the **Next** button to advance to the next ballot page.

7.5   Ballot navigation

At the bottom of the ballot page, the **Back** and **Next** buttons allow the voter to navigate to the prior or subsequent pages on the visual ballot. Until the voter selects a candidate or question response, the **Skip** button is displayed in place of **Next**. Once the voter makes a selection in a race, the navigation button appears as **Next**.

Figure 7-4. Ballot navigation buttons

7.6   Races on the ballot

Each race on the ballot is presented with header text in addition to a list of candidates or responses in case of a question. No more than one race is presented on each ballot page. The header text includes a description of the race as well as the number to vote for. The body of question text is contained in the header.
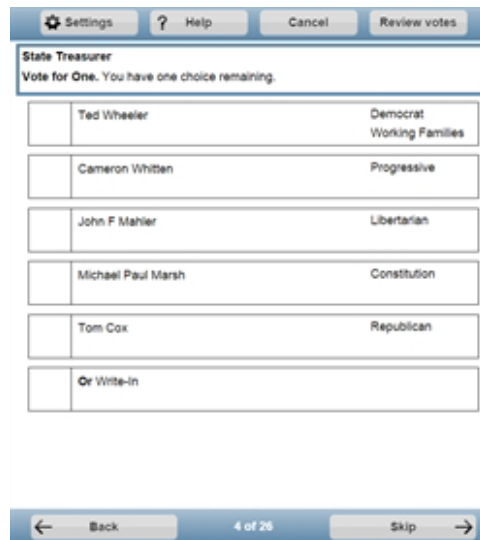
Figure 7-5. Ballot page

If the header text cannot be presented on a single screen, a vertical scroll bar allows the voter to advance to the end of the text and the corresponding question responses. If the list of candidates can't be displayed within a single page on the screen, then a vertical scroll bar will appear next to the candidate list, allowing the voter to advance through the entire candidate list.

The toolbar at the top of the visual ballot page features supporting functions, allowing the voter to configure the ballot presentation, review voting instructions, cancel the ballot, and review current candidate and question selections.

Figure 7-6. Visual ballot toolbar

7.7 Candidate selection

To select a candidate or question response on the visual ballot, touch the box the candidate is displayed in. The selected candidate turns blue (unless non-standard color options have been selected). To de-select the candidate, touch the name of a candidate again, and the candidate field will change again from blue to white.

To select alternate candidate/s when the number to vote for has been reached, an existing candidate must first be de-selected prior to selecting the alternate candidate.

Figure 7-7. Selecting the candidate

7.8 Overvoting

It is not possible to overvote a race in ClearAccess. No action will be taken if you attempt to select an additional candidate when the number of candidates to vote for has already been selected in a race.

The election may be configured in ClearDesign to automatically display a warning message if you attempt to overvote.

Figure 7-8. Attempting an overvote
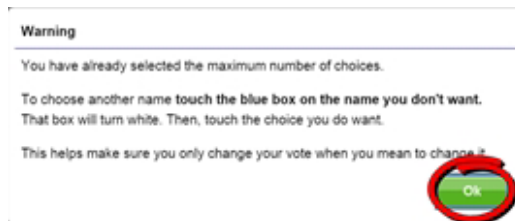
Figure 7-9. Overvote warning message

7.9 Write-ins

To vote for a candidate not registered to run in the election, touch the write-in line at the end of the candidate list. A write-in window containing an electronic keyboard will pop up. Use the buttons on the keyboard to define the candidate name. When the write-in candidate name has been completed, touch the **Accept** button to log the candidate entry and return to the ballot.

Figure 7-10. Selecting the write-in line
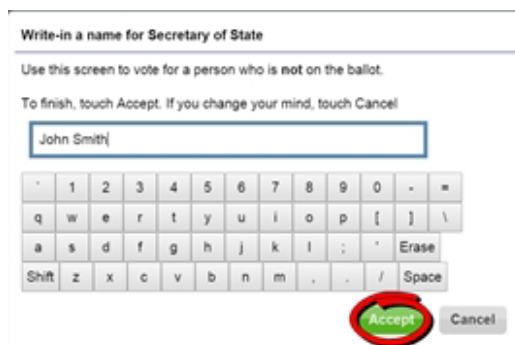
Figure 7-11. Entering a write-in candidate

7.10   Settings

The voter may set:

- Ballot language
- Magnification
- Contrast/color
- Sound
- Screen

options at any point in the voting process. These options are configured in the **Settings** screen, accessed by touching the **Settings** button on the ballot toolbar.
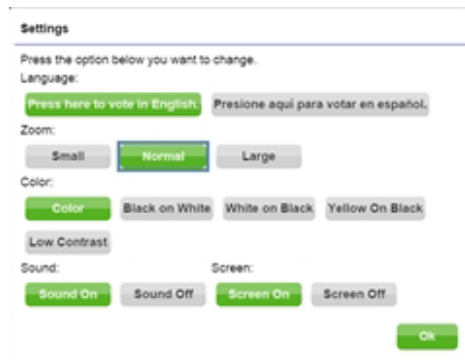
Figure 7-12. Settings screen

7.10.1 Magnification

Small

- decreased magnification
- presents the ballot with smaller fonts
- more information is shown on a single page

Normal

- at a nominal size

Large

- increased magnification
- presents the ballot with larger fonts
- less information is shown on a single page

7.10.2 Contrast/color options

Color:

- race, candidate and header text is presented with colors defined in ClearDesign
- buttons are displayed with default colors

Black on White

- black text against white background
- voted candidates and configured voting options appear in reverse (white text against black background)
- no color appears otherwise

White on Black:

- white text against black background
- voted candidates and configured voting options appear in reverse (black text against white background)
- no color appears otherwise

Yellow on Black:

- yellow text against black background
- voted candidates and configured voting options appear in reverse (black text against yellow background)
- no color appears otherwise

7.10.3 Sound

- touch the **Sound On** button to play back the audio ballot
- touch the **Sound Off** button to suppress audio ballot playback

7.10.4 Screen

- touch the **Screen On** button to display the visual ballot on the monitor
- touch the **Screen Off** button to suppress the visual ballot display

7.11   Ballot review

The ballot review screen appears at the end of the ballot and lists all candidate and question selections made by the voter. Ballot review involves the following:

- Ballot review screen
- Navigating the ballot review screen
- Navigating to and from ballot review

7.11.1 Ballot review screen

The ballot review screen reflects the most current selection of candidates and question responses the voter has made. Races are presented in the same sequence as on the ballot, although only the voted candidates and question responses are listed for each race. Each race on the ballot review screen is presented with race summary text as well the voted candidate and endorsing party, or response in case of a question. If no selection was made in a race, informatory text is displayed for the race, indicating that the race has not been voted.
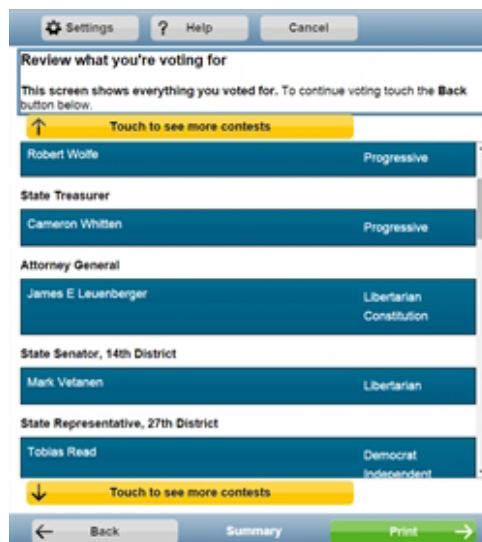
Figure 7-13. Ballot review screen

7.11.2 Navigating the ballot review screen

The ballot review may be navigated using the vertical scroll bar on the right hand side of the race list. The voter may also touch the yellow navigation button at the bottom as well as at top of the ballot review screen to page forward or backward in the race list.
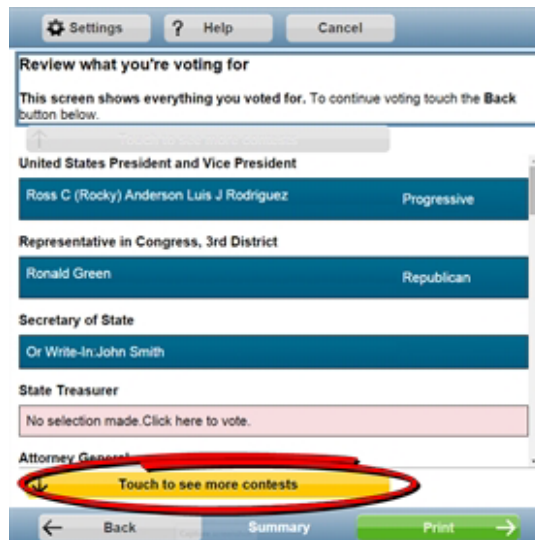
Figure 7-14. Paging forward in the ballot review

7.11.3 Navigating to and from ballot review

The ballot may reviewed at any time in the course of voting by touching the **Review votes** button in the toolbar. The voter may return to a specific race on the ballot by selecting that race in the ballot review. Candidate selections may be added or changed on the ballot before jumping back to the ballot review.

Once ballot review has completed, touch the **Print** button to continue to the ballot printing phase.
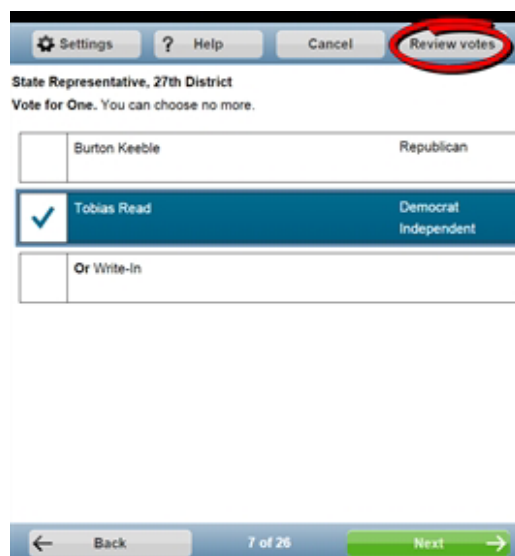
Figure 7-15. Jumping to the ballot review screen
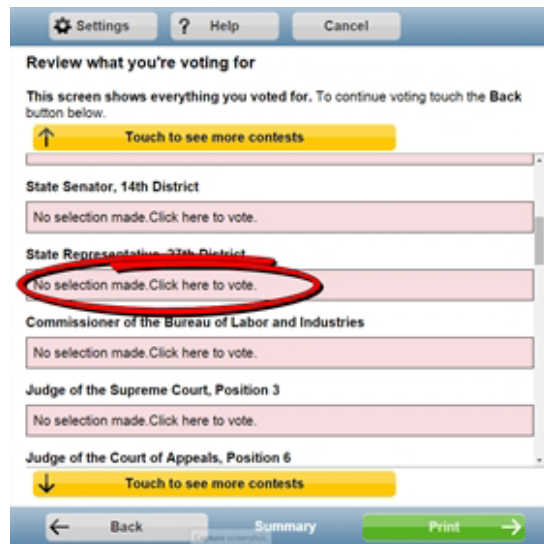
Figure 7-16. Jumping from ballot review to a specific race on the ballot

7.12   Ballot printing

The ballot must be printed once the desired candidate and question responses have been selected and reviewed.

> ✓ The printed ballot contains exactly the same races and questions as presented to the voter in ClearAccess, along with the same candidate and response selections made.

7.12.1 Ballot printing procedure

1. In the ballot review screen, touch the **Print** button.
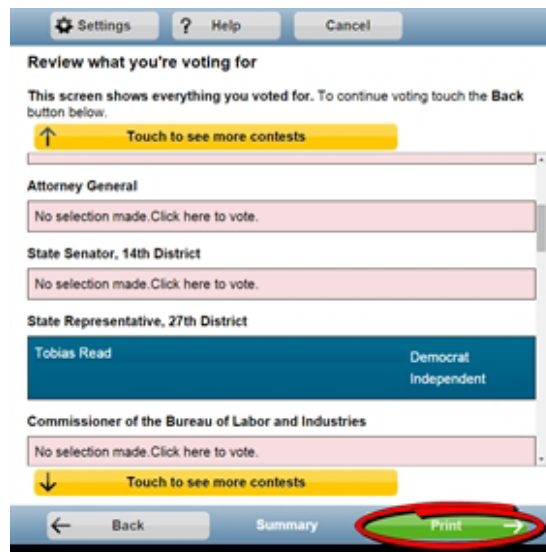
Figure 7-17. Proceed to ballot printing

2. Touch the **Print** button in the print confirmation message.
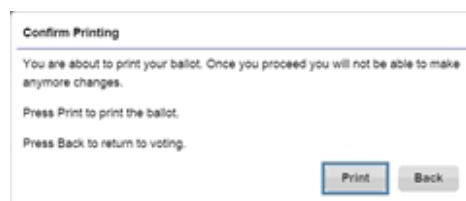
Figure 7-18. Ballot printing confirmation

3. A print status message is displayed as the ballot page/s are printed.

4. Touch the **OK** button in the message confirming the ballot has successfully printed.
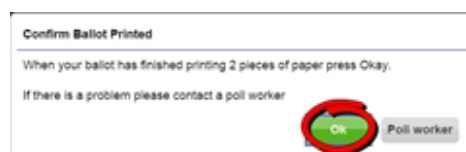
Figure 7-19. Printed ballot confirmation

5. ClearAccess returns to the voter log in screen.

7.12.2 Ballot printing unsuccessful

1. If a discrepancy arises in the course of ballot printing, touch the **Pollworker** button in the ballot print confirmation message and call the pollworker.

Figure 7-20. Call pollworker

2. If the voter's concerns with respect to ballot printing have been resolved, touch the **Done** button in the **Ballot Reprint** prompt, then touch the **Yes** button in the confirmation message.

Figure 7-21. Ballot reprinting complete

Figure 7-22. Ballot print confirmation

3. If the voter's concerns with respect to ballot printing have not been resolved, touch the **Reprint** button in the **Ballot Reprint** prompt.
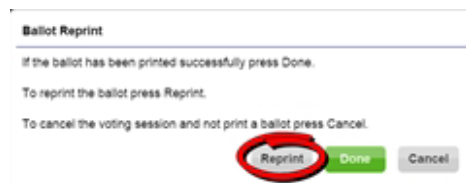
Figure 7-23. Ballot reprinting message

4. Once the ballot has successfully printed, touch the **OK** button in the ballot print confirmation message. ClearAccess then returns to the voter log in screen.
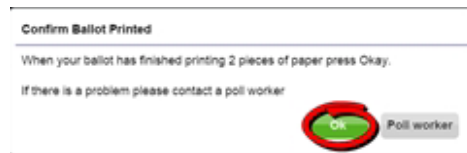
Figure 7-24. Ballot print confirmation

7.13   Ballot cancellation

The ballot may be cancelled at any time in the course of voting. To cancel the ballot, touch the **Cancel** button in the ballot toolbar, then select **OK** in the resulting confirmation message. ClearAccess then returns to the login screen.
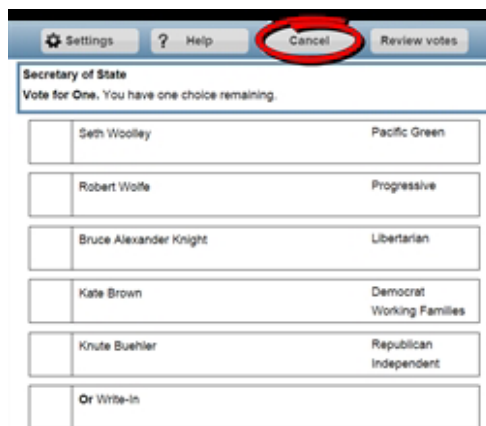
Figure 7-25. Canceling the ballot

Figure 7-26. Ballot cancellation confirmation

Chapter 8. Voting using the EZ Access Keypad

This chapter describes ballot input using the EZ Access Keypad and ballot playback in audio format. The chapter covers the following topics:

- Language selection
- Party selection
- Voting instructions
- Ballot header
- Ballot navigation
- Races on the ballot
- Candidate selection
- Playback volume
- Playback rate
- Pause/resume
- Skip to next/previous sentence
- Overvoting
- Write-ins
- Settings
- Ballot review
- Ballot printing
- Ballot cancellation

> All ballot navigation and voting functionality is accessible using the EZ Access Keypad - no other means of input is required.

8.1 Language selection

The first step in voting involves the selection of ballot presentation language. If the election has been configured using multiple languages, you will hear instructions for selecting the desired language. Use the yellow triangular buttons to navigate through the list of languages, and when the desired ballot language plays back, press the round green button to select that language.

If the election has been defined in ClearDesign™ with only one language (ie. English), then no language selection is presented on the ClearAccess™ ballot.

8.2 Party selection

If the election is a closed primary, you must now select a party. Instructions are played back for selecting the desired party. Use the yellow triangular buttons to navigate through the list of parties, and when the desired ballot party plays back, press the round green button to select the party.

If the election has not been defined in ClearDesign™ as a closed primary, then no party selection is presented on the ClearAccess ballot.

8.3 Voting instructions

Listen to the playback of the voting instructions. Once you have finished listening to the voting instruction, press the white right arrow button to advance to the ballot header.

You may replay voting instructions at any time during voting by pressing the blue diamond-shaped button on the keypad. Listen to the voting instructions, then press the green round button to return to the playback of the candidate list.

8.4 Ballot header

Ballot header information is played back, including the date of the election and the districts applicable to the ballot. This information is taken from election configuration information defined in ClearDesign. Once you have finished listening to the ballot header information, press the white right arrow button to to advance to the first race.

8.5 Ballot navigation

Listen to the playback of race header information, then use the lower triangular button to navigate through the candidate list. If you need to retrace back through the candidate list, use the upper triangular yellow button.

Use the two white arrow buttons located on the left- and right-hand sides in the center of the keypad to navigate through the ballot pages. Press the right arrow button advance to the next page on the ballot, and the left arrow button return to the previous ballot page.

8.6   Races on the ballot

Each race on the ballot is played back with header text, followed by a list of candidates or responses in case of a question. The header text includes a description of the race as well as the number to vote for. The body of question text is contained in the header. Use the yellow triangular down button to advance from the race header to the candidates.

8.7   Candidate selection

To select a candidate or question response, press the green round button when the candidate name plays back. When the candidate has been selected, the candidate name is played back again with a confirmation of having been voted. To de-select the candidate, press the green round button and listen to the name being played back again, without the confirmation of having been voted.

To select alternate candidate/s when the number to vote for has been reached, an existing candidate must first be de-selected prior to selecting the alternate candidate.

8.8   Playback volume

As the ballot plays back, you may increase the audio volume to the desired level by pressing the black rectangular button located at the top, left-hand side of the keypad while repeatedly pressing the yellow triangular up button. To decrease the volume, press the black rectangular button while repeatedly pressing the yellow triangular down button until the desired volume is played back.

8.9   Playback rate

You may increase the rate at which the ballot is played back by pressing the black rectangular button located at the top, left-hand side of the keypad while repeatedly pressing the white right arrow button. To decrease the playback rate, press the black rectangular button while repeatedly pressing the white left arrow button until you reach the desired playback rate.

8.10   Pause/resume

To pause the audio playback of the ballot at any point, press the green round button while pressing the black rectangular button located at the top, left-hand side of the keypad. To resume playback of the audio ballot, press the green round button again while pressing the black rectangular button.

8.11 Skip to next/previous sentence

You may skip audio playback to the beginning of the next sentence by pressing the black rectangular button located at the top, left-hand side of the keypad at the same time as the red button in the top, right-hand corner of the keypad. To skip audio playback to the beginning of the previous sentence, press the black rectangular button at the same time as the blue, diamond-shaped button in the top, center of the keypad.

8.12 Overvoting

It is not possible to overvote a race in ClearAccess. No action will be taken if you attempt to select an additional candidate when the number of candidates to vote for has already been selected in a race.

The election may be configured in ClearDesign to automatically play back a warning message if you attempt to overvote.

8.13 Write-ins

To vote for a candidate not registered to run in the election, advance to the write-in position, then press the green, round button to enter the write-in candidate name.

Once the write-in instructions have played back, use the yellow triangular up arrow key to navigate through the letters of the alphabet, beginning wth a blank space. When you reach the desired letter, press the white right arrow key to select the character and continue to the next character position. If you need to iterate down the alphabet list again, press the yellow triangular down arrow key to locate the desired letter, then press the white right arrow key to accept the current letter and continue to the next position.

Once the candidate name has been completed, press the green round button to accept the write-in candidate and return to the playback of the candidate list.

8.14 Settings

The Settings function is used to define:

- Ballot language
- Magnification
- Contrast/color options

Press the red rectangular button at any point in the voting process to configure ballot settings. For information on exiting Settings, refer to *Exiting Settings*.

8.14.1 Ballot language

If the election is configured with multiple voting languages and you have not yet selected the desired language, use the yellow triangular buttons to navigate through the list of languages, and when the desired language plays back, press the round green button to select the language.

8.14.2 Magnification

If you wish to display the visual ballot and adjust the magnification settings, use the yellow triangular buttons to navigate through the magnification options, and when the desired magnification option plays back, press the round green button to select.

8.14.3 Contrast/color options

If you wish to display the visual ballot and adjust the color/contrast settings, use the yellow triangular buttons to navigate, and when the desired option plays back, press the round green button to select. Continue navigating to the Sound and Screen options, using the green round button to select an alternate visual and audio ballot presentation as necessary.

8.14.4 Exiting Settings

Navigate forward until you hear OK, then press the green round button to save the updated ballot presentation options and return to the voting instructions.

Press the white left or right arrow button if you wish to return to the ballot without making any changes to Settings.

8.15   Ballot review

The ballot review appears at the end of the ballot and lists all candidate and question selections made by the voter. Ballot review includes the following:

- Ballot review content
- Navigating ballot review
- Navigating to and from ballot review

8.15.1 Ballot review content

The ballot review reflects the most current selection of candidates and question responses the voter has made. Races are presented in the same sequence as on the ballot, although only the voted candidates and question responses are listed for each race. Each race in the ballot review is presented with race summary text as well the voted candidate and endorsing party, or response in case of a question. If no selection was made in a race, informatory text is played back for the race, indicating that the race has not been voted.

8.15.2 Navigating ballot review

The ballot review may be navigated using the yellow up and down arrow keys. Repeatedly press the yellow down arrow key to step forward through the race description and the candidate/s voted for each race. To return back through the ballot review, repeatedly press the yellow up arrow key.

8.15.3 Navigating to and from ballot review

The ballot may reviewed at any time in the course of voting by pressing the white right arrow button for more than one second. The voter may return to a specific race on the ballot by pressing the green round button while the race header or corresponding candidate is played back. The voter may change or make additional candidate selections on the ballot before jumping back to the ballot review. Once ballot review has completed, the voter may print the ballot.

8.16 Ballot printing

Once the ballot has been reviewed, the ballot must be printed. Upon completion of ballot printing, ClearAccess returns to the login screen and is ready for the next voter to vote.

> ✔ The printed ballot contains exactly the same races and questions as presented to the voter in ClearAccess, along with the same candidate and response selections made.

8.16.1 Ballot printing procedure

1. When ballot review has completed, press the right arrow button to advance to ballot printing.

2. Press the green round button as the print confirmation message is played back.

3. Once the ballot has been printed, press the green round button to confirm the ballot's successful printing.

4. ClearAccess returns to the voter log in screen.

8.16.2 Ballot printing unsuccessful

1. If a discrepancy arises in the course of ballot printing, wait for the ballot printing confirmation message to play back. Press the yellow down button until 'Pollworker' is played back, then press the green round button. Call the attention of the pollworker.

2. If the pollworker has resolved the printing problem, press the yellow down button in the resulting message playback until 'Done' is played back, then press the round green button to continue. Press the green round button to confirm ending the voting session.

3. To reprint the ballot, press the yellow down button until 'Reprint' is played back in the confirmation message, then press the green round button. When the ballot has successfully printed, press the green round button to confirm that the ballot has printed.

8.17 Ballot cancellation

The ballot may be cancelled at any time in the course of voting. To cancel the ballot, press the white left arrow button for more than one second, then press the green round button when the confirmation message is played back. ClearAccess then returns to the login screen.

Chapter 9. Voting using the Breeze Sip-and-Puff

This chapter describes ballot input using the Breeze Sip-and-Puff and ballot presentation on the touchscreen. This chapter covers the following topics:

- Language selection
- Party selection
- Voting instructions
- Ballot header
- Ballot navigation
- Races on the ballot
- Candidate selection
- Overvoting
- Write-ins
- Settings
- Ballot review
- Ballot printing
- Ballot cancellation

> ✓ All ballot navigation and voting functionality is accessible using the Breeze Sip-and-Puff - no other means of input is required.

9.1 Language selection

The first step in voting involves the selection of ballot presentation language. If the election has been defined in ClearDesign™ with only one language (ie. English), then no language selection screen is shown in ClearAccess™.

To select the ballot language, make the necessary number of single puffs to advance to the desired voting language, then make a long puff to select the language.

Using the sip and puff device, sip or puff to highlight your language, and then do a long puff to select it.

Using the sip and puff device, sip or puff to highlight your language, and then do a long puff to select it.

Press here to vote in English.

Presione aquí para votar en español.
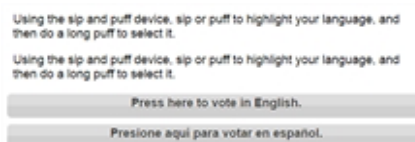
Figure 9-1. Selecting the ballot language

9.2 Party selection

If the election is a closed primary, then the language selection screen is followed by a party selection screen. Make the necessary number of single puffs to advance to the party of choice, then make a long puff to select the party. The ballot will be presented with the races endorsed by the party selected in addition to non-partisan races.

This screen is not presented if the election is not a closed primary.

9.3 Voting instructions

A page with voting instructions is displayed, describing the manner in which a candidate is selected and write-in candidate created.

Make a double puff to advance to the next ballot page.
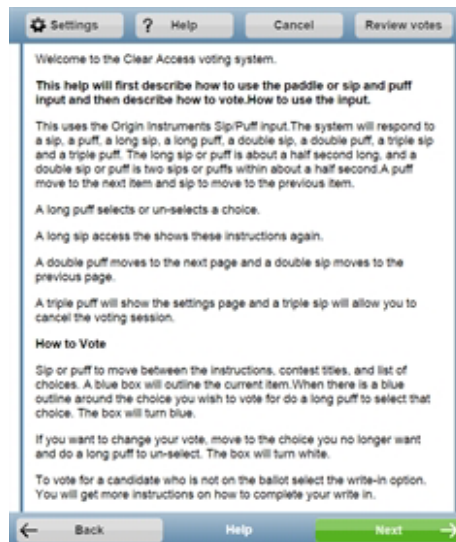
Figure 9-2. Voting instructions

You may redisplay voting instructions at any time during voting by making a long sip. When you have finished reviewing the **Help** screen, make a long puff to return to the ballot.

9.4 Ballot header

The subsequent page displays ballot header information, including the date of the election and the districts applicable to the ballot. The information displayed on the ballot heading screen is taken from election configuration information defined in ClearDesign.

Make a double puff to advance to the next ballot page.

9.5   Ballot navigation

Making a double puff allows you to move to the next ballot page, while a double sip moves to the previous page.

Figure 9-3. Ballot navigation buttons

9.6   Races on the ballot

Each race on the ballot is presented with header text in addition to a list of candidates or responses in case of a question. No more than one race is presented on each ballot page. The header text includes a description of the race as well as the number to vote for. The body of the question text is contained in the header.

Figure 9-4. Ballot page

Issue a double puff to jump to the next race, then a series of single puffs to step through the candidate list. Use single sips to return to earlier candidates in the list.

9.7 Candidate selection

Make a long puff to select a candidate or question response. The selected candidate turns blue (unless non-standard color options have been selected). To de-select the candidate, make another long puff , and the candidate field will change again from blue to white.

To select alternate candidate/s when the number to vote for has been reached, an existing candidate must first be de-selected prior to selecting the alternate candidate.
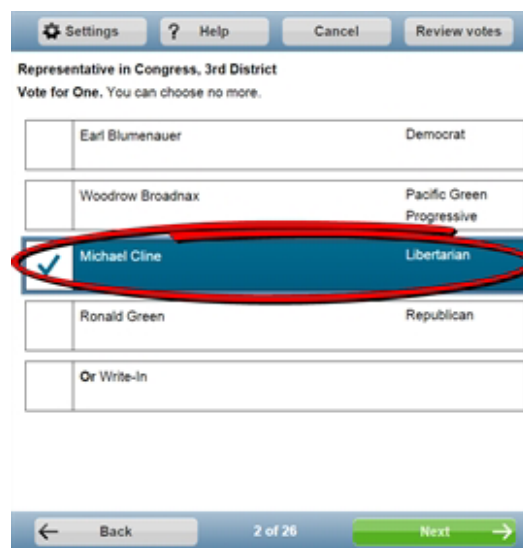
Figure 9-5. Selecting the candidate

9.8 Overvoting

It is not possible to overvote a race in ClearAccess. No action will be taken if you attempt to select an additional candidate when the number of candidates to vote for has already been selected in a race.

The election may be configured in ClearDesign to automatically display a warning message if you attempt to overvote.
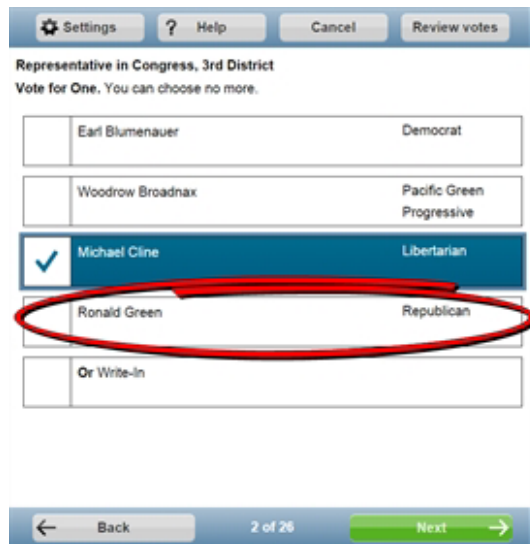
Figure 9-6. Attempting an overvote
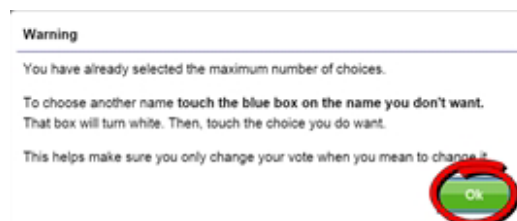
Figure 9-7. Overvote warning message

9.9   Write-ins

To vote for a candidate not registered to run in the election, use a series of single puffs to reach the write-in line at the end of the candidate list, then a long puff to select the write-in position.

A window will pop up in which the write-in candidate is entered. Using a series of single puffs, beginning with a space, step through the letters of the alphabet to reach the desired letter. Use a double puff to accept the letter and continue to the next character position. Once the name is complete, use a long puff to log the candidate name in the contest's write-in position.

Figure 9-8. Selecting the write-in line

9.10 Settings

The voter may set the

- Ballot language
- Magnification
- Contrast/color options
- Sound
- Screen

at any point in the voting process. These options are configured in the **Settings** screen, accessed with a triple puff. Use the single puff to step through the list of options, and a long puff to select a particular option.

Once the configuration has been set, navigate to the **OK** button using a series of single puffs. Use a long puff to save the settings and return to the ballot.
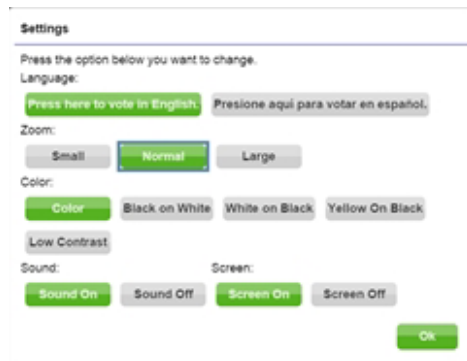
Figure 9-9. Settings screen

9.10.1 Magnification

Small

- decreased magnification
- presents the ballot with smaller fonts
- more information is shown on a single page

Normal

- at a nominal size

Large

- increased magnification
- presents the ballot with larger fonts
- less information is shown on a single page

9.10.2 Contrast/color options

Color:

- race, candidate and header text is presented with colors defined in ClearDesign
- buttons are displayed with default colors

Black on White

- black text against white background
- voted candidates and configured voting options appear in reverse (white text

against black background)

- no color appears otherwise

White on Black:

- white text against black background
- voted candidates and configured voting options appear in reverse (black text against white background)
- no color appears otherwise

Yellow on Black:

- yellow text against black background
- voted candidates and configured voting options appear in reverse (black text against yellow background)
- no color appears otherwise

9.10.3 Sound

- touch the **Sound On** button to play back the audio ballot
- touch the **Sound Off** button to suppress playback of the audio ballot

9.10.4 Screen

- touch the **Screen On** button to display the visual ballot on the monitor
- touch the **Screen Off** button to suppress the visual ballot display

9.11 Ballot review

The ballot review screen appears at the end of the ballot and lists all candidate and question selections made by the voter. Ballot review comprises the following:

- Ballot review screen
- Navigating the ballot review screen
- Navigating to and from ballot review

9.11.1 Ballot review screen

The ballot review screen reflects the most current selection of candidates and question responses the voter has made. Races are presented in the same sequence as on the ballot, although only the voted candidates and question responses are listed for each race. Each race on the ballot review screen is presented with race summary text as well the voted candidate and endorsing party, or response in case of a question. If no selection was made in a race, informatory text is displayed for the race, indicating that the race has not been voted.
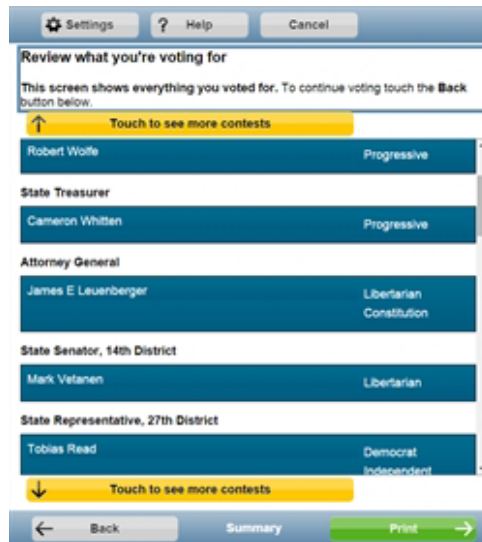
Figure 9-10. Ballot review screen

9.11.2 Navigating the ballot review screen

Use a series of single puffs to step through the races and candidates. The first puff takes the voter to the race heading text, while subsequent single puffs step through the voted candidates and question responses. To step back through the ballot review, use a series of single sips.

9.11.3 Navigating to and from ballot review

Ballot review occurs immediately after the last race on the ballot. Use a double puff to advance from the last race to the ballot review. The voter may return to a specific race on the ballot by selecting that race in the ballot review. Candidate selections may be added or changed on the ballot before paging through the ballot back to the ballot review.

Once the ballot review has completed, perform a double puff to advance to the ballot printing phase.
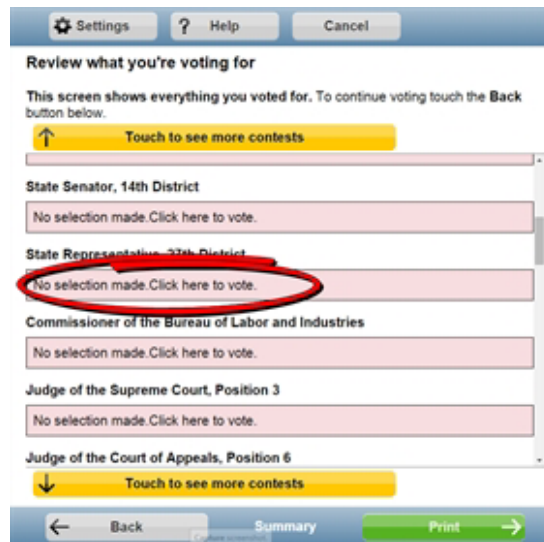
Figure 9-11. Jumping from ballot review to a specific race on the ballot

9.12 Ballot printing

The ballot must be printed once the desired candidate and question responses have been selected and reviewed.

> ✓ The printed ballot contains exactly the same races and questions as presented to the voter in ClearAccess, along with the same candidate and response selections made.

The nominal ballot printing procedure is described in *Ballot printing procedure*. To resolve ballot printing discrepancies, refer to *Ballot printing unsuccessful*.

9.12.1 Ballot printing procedure

1. In the ballot review screen, perform a single puff to advance to ballot printing.
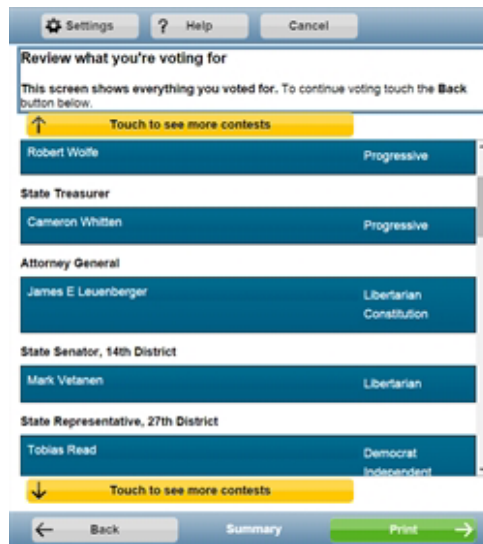
Figure 9-12. Ballot review screen

2. Perform a long puff in the print confirmation message.
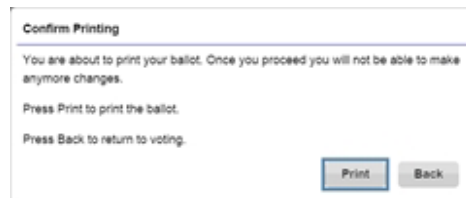
Figure 9-13. Ballot printing confirmation

3. A print status message is displayed as the ballot page/s are printed.

4. Perform a long puff in the message confirming the ballot has successfully printed.

Figure 9-14. Printed ballot confirmation

5. ClearAccess returns to the voter log in screen.

9.12.2 Ballot printing unsuccessful

1. If a discrepancy arises in the course of ballot printing, perform the necessary single puffs to advance to the **Pollworker** button in the ballot print confirmation message, then perform a long puff. Call the pollworker.

Figure 9-15. Call pollworker

2. If the voter's concerns with respect to ballot printing have been resolved, perform the necessary single puffs to reach the **Done** button in the **Ballot Reprint** prompt, then perform a long puff.

Figure 9-16. Ballot reprinting complete

3. Perform a long puff in the confirmation message.

Figure 9-17. Ballot print confirmation

4. If the voter's concerns with respect to ballot printing have not been resolved, perform a long puff in the **Ballot Reprint** prompt to reprint the ballot.

Figure 9-18. Ballot reprinting message

5. Once the ballot has successfully printed, perform a long puff in the ballot print confirmation message. ClearAccess then returns to the voter log in screen.
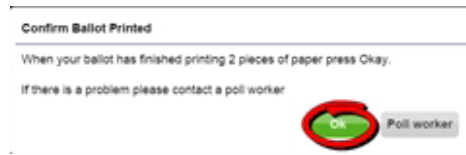
Figure 9-19. Ballot print confirmation

9.13   Ballot cancellation

The ballot may be cancelled at any time in the course of voting. To cancel the ballot, peform a triple sip, then peform a long puff when the resulting confirmation message is displayed. ClearAccess then returns to the login screen.

Figure 9-20. Ballot cancellation confirmation

Chapter 10. Election Day

Election Mode is used to vote ballots in live election mode, be it on election day or on any early voting day.

Election day-related activities involve the following:

- Setting ClearAccess to Polls Open mode
- Voting
- Resuming voting
- Closing the polls

10.1   Setting ClearAccess to Polls Open mode

At the beginning of election day (or the first day of early voting), pollworkers set the ClearAccess unit to Polls Open mode.

1. Log onto ClearAccess using the Pollworker role.

Figure 10-1. Set for Election log in screen

2. In the **Set for Election** menu, touch the **Open Poll** button.

Figure 10-2. Opening the polls

3. Touch the **Okay** button in the confirmation message.
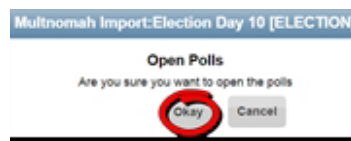
Figure 10-3. Poll opening confirmation message

4. ClearAccess is now set to the voter log in screen and is ready to vote.
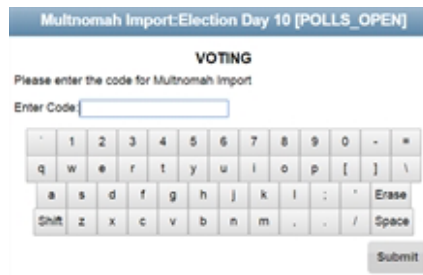
Figure 10-4. Voter log in screen

Irrespective of the user role you use to log in—be it Voter, Pollworker, Election, Administrator or Maintenance, ClearAccess will always return to this log in prompt, until the election state is changed (ie. the election is closed).

10.2 Voting

The following procedure is used to vote with the ClearAccess unit on election day.

1. The voter is registered at the polling location.

2. The pollworker logs onto the ClearAccess unit using the designated voter code.

Figure 10-5. Voter log in screen

3. The pollworker selects the desired ballot input and presentation options in the **Select Ballot** menu, followed by the precinct/split reflecting the voter's place of residence.
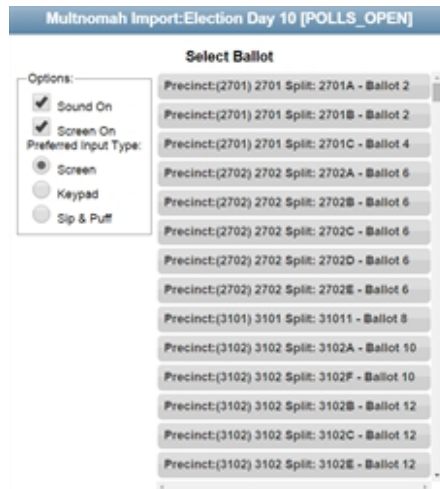
Figure 10-6. Ballot selection menu

4. The voter votes and prints the ballot.

5. Once the voter has finished voting, ClearAccess returns to the Voting log in screen.

10.3   Resuming voting

Logging in Polls Open mode either using the Pollworker or Election role displays the following menu:

Figure 10-7. Polls Open menu

Touching the **Resume Voting** button will return ClearAccess to the voting log in prompt, whereupon voting may continue.
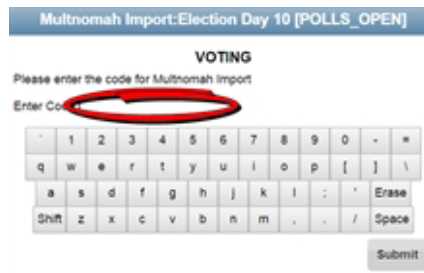
Figure 10-8. Voter log in screen

10.4 Closing the polls

Once voting has finished at the end of election day, the polls must be closed in ClearAccess. Once the polls have been closed, the election will be in Post-Election mode. Only the Pollworker or Election roles may be used to close the polls.

✓ At the end of every early voting day, ClearAccess should be shut down, but the polls *not* closed. The polls should only be closed in ClearAccess at the end of election day.

1. Log into ClearAccess using the Pollworker role.

Figure 10-9. Voter log in screen

2. Touch the **Close Poll** button in the menu.

Figure 10-10. Polls Open menu

3. Touch the **Okay** button in the confirmation message.

Figure 10-11. Poll closing confirmation message

4. The **Post-Election** menu now appears.

Figure 10-12. Post-Election menu

Chapter 11. Closing the Election

The polls should be closed in ClearAccess™ at the end of election day.

> ✓ Do not close the polls in ClearAccess at the end of an early voting day. Instead, ClearAccess should be shut down at the end of each early voting day, and the polls closed in ClearAccess only once the election period has officially ended (ie. the end of election day).

Closing the election involves the following tasks:

- Reopening the polls
- Closing the election

11.1   Reopening the polls

Polls may be reopened when the election has been set to Post-Election mode. This function is available to either the Pollworker or Election role.

1. Log in to Post-Election Mode.

Figure 11-1. Post-Election log in screen

2. If you log in using the Pollworker role, the following menu appears.

Figure 11-2. Post-Election menu (Pollworker role)

3. On the other hand, if you log in using the Election role, the following menu appears.

Figure 11-3. Post-Election menu (Election role)

4. Touch the **Re-Open Polls** button.

5. Touch the **Okay** button in the confirmation prompt.

Figure 11-4. Setting for Election confirmation

6. ClearAccess is now in Election Mode, and needs to be set to Polls Open mode. Touch the **Open Poll** button in the **Set for Election** menu.

Figure 11-5. Opening the polls

7. Touch the **Okay** button in the confirmation message.
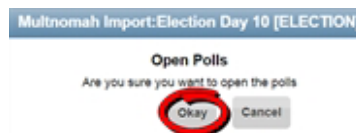
Figure 11-6. Poll opening confirmation message

8. The election is now ready to be voted again.

Figure 11-7. Polls Open log in screen

11.2   Closing the election

Once all administrative functions relating to election closing have been performed, the election may be closed. The election may be closed by either an Election or Administrator role. Once the election has been closed and unloaded, ClearAccess may only be accessed using the Administrator or Maintenance roles.

1. Log in using either the Election or Administrator role.

Figure 11-8. Post-Election log in screen

2. The following menu appears if you log in using the Election role.

Figure 11-9. Post-Election menu

3. The following menu appears if you log in using the Administrator role.

Figure 11-10. Unload Election menu

4. Touch the **Close Election** button in the menu.
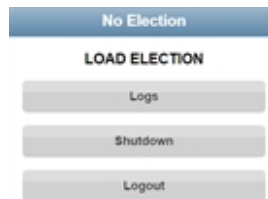
5. Touch the **Okay** button in the confirmation prompt.

Figure 11-11. Election closing prompt

6. The election has now been closed and unloaded.

Figure 11-12. Unload election menu

Chapter 12. Audit

Significant operation, configuration and maintenance transactions in ClearAccess™ are posted to one of two audit logs. Election-specific transactions that occur while an election is loaded are posted to the election audit log, while system-specific transactions are posted to the system audit log at any point during ClearAccess usage, whether an election has been loaded or not.

Logs are displayed in chronological order, every line of the audit log representing a unique transaction. Every audit transaction is logged with the transaction date and time, severity level, user role, and transaction message class—election audit logs also include the election state.

Audit logs may be accessed from any election mode by the Administrator and Maintenance roles. Audit logs may be accessed in Pre-Election, Election, Polls Open, and Post-Election modes using the Election role, and by the Pollworker role in the same modes as the Election role except for Pre-Election mode.

Once an election has been loaded, you can alternate between the system log and election log by toggling a button on the toolbar running along the top of the screen. The election log tracks all transactions pertaining to the currently loaded election, while the system log tracks all transactions occurring on the machine independent of the current election.

> ✔ Audit messages are system-generated, and may not be altered by theClearAccess™ user.

Five levels of severity are represented in the audit logs:

- Trace—An action was taken by the user that did not change the election or system state
- Information—An action was taken by the user that affected the state of the election or system
- Warning—A user-related warning was displayed
- Error—A user error occurred such as the entry of an invalid code
- Exception—A critical system error occurred, preventing the further operation of the current transaction

Figure 12-1. System Audit log

To display the election-specific log, touch the **Election Log** button.

Figure 12-2. Election Audit log

Appendix A. Glossary

The follow is a glossary of terms used in conjunction with Clear Ballot Group™ products.

absentee voters (AB)

An example of a counter group.

Access Control List (ACL)

A list that specifies which users or system processes are granted access to objects, and what operations are allowed on given objects.

Audio ballot

A ballot whose descriptive text, race text, candidates and responses, navigation and controls are played back in audio format.

auditing system

A system used for re-counting contested elections.

Audit log

Indelible log to which all significant events pertaining to the system and any current election are posted in chronological order.

Automatic Document Feeder (ADF)

An input-tray feature of several Fujitsu scanner models.

ballot

The official presentation of all of the contests to be decided in a particular election.

Ballot Definition File (BDF)

A document unique to each election that enables the ClearCount software to successfully register and analyze a ballot. Clear Ballot Group™ creates and tests these files prior to an election based on the jurisdiction's ballot style PDFs.

Ballot Definition File tables (BDF tables)

Tables generated by software after analyzing PDF files used to describe an unvoted ballot, submitted by the jurisdiction.

ballot handling station

A space consisting of a flat, clear surface on which to unseal ballot boxes (if required), stage ballots for the preparation/jogging station, and reseal ballot boxes. All required ballot box record keeping occurs at the ballot handling station.

ballot image file

One of two files—one for each side of a card—created during scanning as industry standard JPG files, and stored in a folder on the ScanServer™.

Ballot Images report

A report that allows for paging through ballot image files.

ballot jogger

A machine used to align ballots prior to scanning, helping to eliminate misfeeds and ensuring consistent ballot speed throughput.

Ballot Resolver™

An application that aids adjudication of a ballot by providing a image of the ballot and a way to set ballot status. The Ballot Resolver is part of the Election Administration web application.

Ballot review

Stage of the voting using ClearAccess™ prior to printing in which the voter may review all candidate and response selections made on the ballot, optionally altering or adding selections by transferring directly to the affected races.

ballot style ID

A number that represents a particular ballot layout. A ballot style ID is an ID unique to each election and identifies each "front and back" of a card.

Ballot style PDFs

Files a jurisdiction provides that the uses to create a BDF zip file.

BallotID

A unique string that identifies a single particular voted ballot.

batch ID

An ID that appears on both the target card and the box label for each batch of ballots. For example, if the target card indicates a batch ID of ED-11, then a label marked ED-11 is affixed to the box where the ballots are to be placed. This helps to identify the location of the ballots during the ballot verification process.

blank vote

A contest where no votes have been recorded. In a vote for one contest, an under vote is the same as a blank vote.

block style ballot

Ballots that have the votes arranged in columns like in a newspaper format. See *grid style ballot*.

box label

A label that physically identifies each box and its corresponding ballots. Like target cards, box labels use the box ID as a unique identifier. The box label is affixed to a uniform spot on the outside of the ballot box after the ballots are scanned.

Box report

A report that details the contents of each box of ballots .

BoxID

A unique string that identifies a particular box of ballots. It appears on a label affixed to a box of ballots.

Breeze Sip-and-Puff

Input device used by mobility-impaired voters when voting in ClearAccess™. The device provides ballot navigation and control functionality by means of sips and puffs.

calibration card

A card printed from the website used to test the scanning equipment.

candidate

Person contending in a contest for office. A candidate may be presented as one of the choices on the ballot or may be a write-in candidate.

canvass

The period just after an election when all of the information is assembled, including late arrivals (such as overseas ballots).

canvassing board

The election officials who rule on permissible ballots and adjudicate marginal marks in close elections.

Cast Vote Record (CVR)

A report that shows one record per ballot where columns are one per oval.

central count

Centralized ballot card scan and tabulation. ClearCount is a central count system. Compare *precinct count*.

central count facility

The location where the ClearCount central scan operation takes place. Clear Ballot Group assumes that the jurisdiction maintains an acceptable level of ballot and hardware security at the central count facility.

certification

Procedure by which a third party gives written assurance that a product, process, or service conforms to specified requirements.

certified results

The results from central or precinct count that are considered the final result.

choice

The target location of a particular vote. This could be Yes or No for a bond issue or one candidate from a field of candidates.

A selection presented to a voter for a single contest.

Choice Election Identity

This identity states that for each choice within a contest on a ballot, that choice must be classified as a vote, a non-vote, or participating in an under vote or an over vote. As with the Contest Election Identity, this means that the total of votes, over votes, under votes, and non-votes for a given choice must equal the total number of times that the choice appeared on a scanned ballot.

choice zone

The area on a ballot that displays all the information about a specific contest choice, including the choice's target zone.

choice zone density

The calculation of the relative darkness of a vote target, used to interpret voter intent.

ClearAccess™

Accessible Windows-based ballot marking system produced by Clear Ballot Group, intended for visibility- and mobility-impaired voters.

ClearAudit™

Clear Ballot Group's optical scan election audit product.

ClearCount

Clear Ballot Group's optical scan central count system.

code channel

The encoded unique bar code data imprinted on the ballot. Unlike the traditional bar code used on retail items, a ballot's bar code consists of heavy dark blocks. Its interpretation is defined by the vendor of the ballot layout system.

comma separated value (CSV)

A file that stores tabular data in plain text form.

Commercial Off-The-Shelf (COTS)

Commercially available hardware.

Comparison Results File (CRF)

A zip file containing a number of text files in CSV format which collectively describe a set of tabulation totals to which tabulation totals should be compared. Creating a CRF is optional, and doing so allows the user to see the differences between tabulation totals and the Comparison Results File (CRF) totals.

consumable

Fujitsu scanner components, such as rollers and pads, that need to be replaced periodically. The Fujitsu documentation included in the Technical Data Package (TDP) specifies the schedule for consumable replacement as well as the method for obtaining and installing them.

contest

A single issue in an election, such as a Presidential race or a bond issue. A contest can have one or more choices to choose from, including a write-in choice.

Contest Election Identity

This identity states that for each contest on a ballot, that contest must be classified as either being properly voted, blank voted, or over voted. The number of ballots in each of these classifications must equal the total number of ballots on which that contest is present.

contest zone

The area on a ballot that displays all the text associated with that contest, including its choice zones.

counter group

A group of voters identified by code so their votes can be reported separately. The number and names of counter groups can vary by jurisdiction. Examples are *Election Day* (ED), *Provisional* (PR), and *Absentee* (AB).

DeleteBox utility

A utility that allows for deleting of boxes of ballots from an election database by those with modify access or above.

digital adjudication

How election officials can identify, analyze, and resolve ballot issues using .

digital outstacking

ClearCount's method of flagging unreadable ballot images so they may be electronically reviewed and adjudicated.

Direct Recording Electronic (DRE)

A type of voting machine that records votes by means of a ballot display with

mechanical or electro-optical components that can be activated by the voter (typically with buttons or a touchscreen); that processes data by means of a computer program; and that records voting data and ballot images in memory components.

Discriminant function (DF)

A Tabulator module that analyzes and classifies voter marks read from those ballot images that pass registration. The Discriminant function uses progressive rounds of grouping and comparison to classify voter marks.

early voters (EV)

An example of a counter group.

edge marks

The markings between the Ballot text and voting targets and the outside edge of the paper. These edge marks include timing marks and code channel marks. Typically these are not human readable. The Tabulator uses edge marks as landmarks to rotate and then align the ballot for vote recognition.

Election Administrator application

An application that can be used to elevate the default access for any user to a higher level of access.

Election Administration Station

A computer in a setup used to set up an active election and to review relevant reports; it is connected to the ScanServer.

Election audit log

Indelible log to which all significant events pertaining to the current election are posted in chronological order.

election database

In ClearCount, the database that stores all the information about a given election.

Election Day (ED)

Voters casting ballots at a polling place on Election Day; an example of a counter group.

election district

synonymous with precinct (varies by state).

election identity

See *Contest Election Identity* and *Choice Election Identity*.

election management system (EMS)

A system that handles the election definition, ballot preparation, precinct-count operations, and vote consolidation in an election.

Election mode

ClearAccess™usage state following the completion of election preparation activities, and preceding election day voting.

Ethernet

The wired network connection that connects the ScanStations to the switch and the ScanServer.

EZ Access™ keypad

Input device used by mobility-impaired voters with ClearAccess™ . The keys provided on the keypad provide ballot navigation and control functionality.

Functional Configuration Audit (FCA)

An exhaustive verification of every system function and combination of functions, done as part of voting system certification. See also *Physical Configuration Audit*.

grid style ballot

Ballots that have columns for Contest and rows for Parties. See *block style ballot*.

hopper

The input tray on a scanner.

human review and adjudication

The human-driven process to manually select a ballot for counting in a re-count. Accounting records are kept for each vote altered.

image registration

The process of determining the logical front side of the ballot and its readable orientation and then locating all important landmarks on the image

Image-to-Ballot Traceability™

The procedures and record-keeping necessary to allow an election to find the specific ballot that corresponds to a given ballot image at any point following the initial scan.

Keypad

Refer to *EZ Access keypad*.

Legacy EMS Connector

A Clear Ballot Group application that maps the jurisdiction's ballot style PDFs to a Ballot Definition File (BDF).

Load election

Function that makes the specified election file current in ClearAccess™ .

Logic and Accuracy testing (L&A testing)

Voting system test in which a test deck of specially marked ballots is scanned to see if the voting system is processing things correctly.

Logical Volume Manager (LVM)

A flexible method of disk space allocation.

Maintenance

ClearAccess™role used to perform background configuration and maintenance tasks.

marginal votes

Votes that convey voter intent with least certainty.

MatchPoint™

In Clear Ballot Group's MatchPoint system, MatchPoints are identically defined, independently computed points of comparison between the voting system and ClearAudit. There are two kinds of MatchPoints:

- A Ballot MatchPoint is created for each counter group for each precinct.
- A Vote MatchPoint is created for each choice available on a Ballot MatchPoint.

Together, Ballot MatchPoints and Vote MatchPoints provide a scalable measure to compare the general accuracy of the results of an election.

misfeed

Misfeeds (also called paper jams) occur when a ballot gets stuck moving through the scanner.

multifeed

A scanner error in which more than one ballot is pulled in and scanned at the same time.

multi-grab

Ballots reported as more than .25 in. longer than expected; the result of a multifeed.

network switch

A network extender that allows you to connect more ScanStations to the ScanServer when a router is not sufficient.

non-vote

A ballot position for which the target has not been marked, but the vote rule has been satisfied for other choices.

Numeric keypad

Refer to *EZ Access keypad*.

Other Voters (OV)

An example of a counter group.

oval

The location a voter marks to indicate his or her choice in a given contest, used synonymously with vote target by Clear Ballot Group. Note that in some voting systems, the vote target consists of a different shape, such as a rectangle or a broken arrow.

oval density

The calculated darkness or density of a voted oval. Higher densities represent a stronger indication of voter intent. After calculating oval density, sorts the ovals by density.

oval visualization report

See *Vote Visualization*

over vote

A ballot position for which the target has been marked, but more targets in its contest have been marked than its contest's vote rule allows. The vote rule is the maximum number of choices that can be selected for a contest.

PDF Analysis

Process in which Clear Ballot Group software uses information to describe an unvoted ballot and generate BDF tables. The information provided is in PDF files and is either text or the virtual coordinates of a region on the ballot.

Physical Configuration Audit (PCA)

A comparison of system components to system documentation, done as part of voting system certification. See also *Functional Configuration Audit*.

Polls Open mode

ClearAccess™ state when live voting occurs.

Post-Election mode

ClearAccess™ usage state for performing election wrap-up activities following the completion of voting.

precinct count

A precinct count scans and tabulates ballot cards at the voting locations. Precinct counts still must be certified at a later step. Compare *central count*.

Pre-Election mode

ClearAccess™usage state for testing ballots.

prime name

When multiple languages appear on a ballot, the name in a contest might appear in a number of languages, for example when a ballot serves a population that uses a distinct alphabet. In the USA, the prime name is in English.

Provisional (PR)

An example of a counter group.

registration

The process of determining the logical front side of the ballot, its readable orientation and locating all important landmarks on the image such as timing marks and the marks in the code channel.

Re-open the polls

Post-Election mode option that allows live voting to continue in ClearAccess™.

Resume voting

Function that allows Election and Pollworker roles to return ClearAccess™ to voting live ballots.

Role

Class of ClearAccess™log in profile that determines the activities a user may perform and election states the user may access.

router

The device that connects the ScanStations to the ScanServer.

ScandAll PRO™ (ScandAll)

Fujitsu scanner software, which must be installed on each ScanStation™ client laptop.

ScanServer

The ScanServer consists of a laptop and associated cables. The ScanServer serves as a data collection and display area, which allows team members to view critical statistics related to the scanning process. Information such as number of ballots scanned, location data, and an ETA for completion of scanning are displayed at this station.

ScanStation

A ScanStation consists of a scanner, a laptop computer, associated cables and a surface (typically a portable table) used to place the equipment and to provide space for inbound and outbound ballots.

sensitivity test

Testing to ensure the system is reading marginal marks properly.

Sip and puff

Refer to *Breeze sip and puff*.

software restriction policy (SRP)

A feature of Windows XP and later operating systems that enables administrators to control which applications are allowed to run on Microsoft Windows. Administrators can configure SRP to prevent all applications in their domain from running except applications they explicitly allow.

System audit log

ClearAccess™indelible log to which all significant events pertaining to the system's functioning (not including election-related transactions) are posted in chronological order.

Tabulator

The program that runs on each ScanStation computer. It allows the ScanServer to analyze the documents on the ScanStation computer and transfer them to the ScanServer output folder. It processes ballot images in order to count the votes for every candidate or choice.

target card

A printed card that indicates that a new box is being scanned. Its barcode is used to assign the value as the BoxID prefix for all subsequent ballots. There is one target card per box label.

target zone

The area in which a voter marks the ballot to indicate voter intent.

Technical Data Package (TDP)

A technical description of an item adequate for supporting an acquisition strategy, development, manufacturing development, production, engineering, and logistics throughout the item's lifecycle.

Ten-Day (TD)

An example of a counter group, as for overseas military.

test deck

A set of specially-marked ballots used to test a voting system.

test plan

A document created prior to testing that outlines the scope and nature of testing, items to be tested, test approach, resources needed to perform testing, test tasks, risks and schedule.

timing marks

The outermost marking on many ballots to align the scanner to the voting target area.

transition zone

In Clear Ballot Group's Vote Visualization™, the region containing the relatively small numbers of ovals for a candidate or issue that, under human inspection, might be reclassified: a marginal vote to an under vote, an over vote to a vote, and so on.

under vote

A ballot position for which the target has not been marked, and the number of marks in the contest are less than the vote rule.

Unload election

Function that removes election from currency in ClearAccess™.

virtual coordinates

Coordinates in database tables that describe the ballot layout.

visual ballot

ClearAccess™ballot whose descriptive text, race text, candidates and responses, and navigation and controls are presented in visual format on the touchscreen.

vote

A ballot position for which the target has been marked and no other targets in its contest have been classified as over voted.

vote rule

The maximum number of choices that can be selected for a contest.

vote target

The location a voter marks to indicate his or her choice in a given contest. Also known as oval.

Vote Visualization™

Clear Ballot Group's Vote Visualization is the tool that uses to resolve voter intent. Vote Visualization examines every oval for each candidate. It groups marginal votes, over votes, and under votes in a narrow field of view so the canvassing board can quickly determine the degree to which the software algorithm for adjudicating a vote agrees with human interpretation.

voting tabulation system

The primary counting system for an election. See *auditing systems.*.

voted ballot

A ballot that contains all of a voter's selections and has been cast.

voting target area

The oval or rectangular area to fill in on a ballot. (Other shapes, such as an arrow with a gap that must be bridged, are sometimes used.)

whitelist

A list that allows you to prohibit unauthorized programs by default. See *software restriction policy.*

write-in

A selection of an individual not listed on the ballot.

Appendix B. Setup Mode

Setup mode in ClearAccess™ allows the user to configure the system date and time, printer, and optionally Administrator and Maintenance passwords. Setup is accessible only to the Administrator and Maintenance roles. The Administrator and Maintenance passwords can only be changed using the Administrator role.

Configure ClearAccess in the **Setup** screen as follows:

1. If the time zone displayed in the **TimeZone** field is not correct, touch the drop-down list and select the correct entry.

2. Ensure that the **Automatically adjust Daylight Savings Time** check box is selected.

3. If the current date is not correct in the **Date** field, update the value as follows:
   a. If the year is not correct, touch the year value and use the spin buttons that appear to the right to increment or decrement the year as required.

   b. If the month is not correct, touch the month value and use the spin buttons that appear to the right to increment or decrement the month as required.

   c. If the day is not correct, touch the day value and use the spin buttons that appear to the right to increment or decrement the day as required.

   d. Alternatively, moving the mouse over the field displays a black triangle icon to the right-touch here to enable a calendar view of the date, which allows you to change the year, month and day as required.

4. If the current time is not correct in the **Time** field, update the value as follows:
   a. If the hour is not correct, touch the hour value and use the spin buttons that appear to the right to increment or decrement the hour as required.

   b. If the minutes are not correct, touch the minutes value and use the spin buttons that appear to the right to increment or decrement the minutes as required.

   c. If the seconds are not correct, touch the seconds value and use the spin buttons that appear to the right to increment or decrement the seconds as required

5. If the Administrator password is to be changed, enter the new password in both the **Admin Password** field and **Confirm Password** field immediately following.

6. If the Maintenance password is to be changed, enter the new password in both the **Maintenance Password** field and **Confirm Password** field immediately following.

Figure B-1. Election setup screen