



ELECTRONIC POLLBOOK MANUAL EPB



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Revised September 2020

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EPB Inventory

	EPBs (Lenovo Laptops)
	EPB Power Supplies
	USB-Port Handheld Scanners
	8 Port Surge Protector
	Lunch Bag - Wired Switch, (3) Network Cables
	USB-Port Mice
	Mouse Pads
	Pre-Installed EPB Thumb Drive

Setup and Power-On

1. Set-up the EPB Laptops *without* powering them on

1. Due to unknown battery levels, do not power on the laptops until after the setup is complete.
2. Set the 3 to 4 laptops out on the table so there is enough elbowroom for people to type and use the mice.
3. Plug the power cables to laptops (found on the side of the laptop.) (The power connections might be square or round.)
4. Plug a mouse into a USB port on each laptop and place the mouse pad next to each laptop.
5. Plug/attach the hand held scanners into laptops' USB ports.



2. Set-up the Surge Protector

1. Place the surge protector on the floor where people are not likely to trip on it or disturb it, but close enough to plug the laptops into it.
2. Plug the laptop power cords into the surge protector.
3. Plug the surge protector into a wall outlet.
 - Feel free to use an **extension cord**.
 - Use the **blue tape** to anchor loose cords
4. Press the Power button to turn on the power surge protector. Make sure the green power light is on.



Setup (continued)

3. Connection Setup

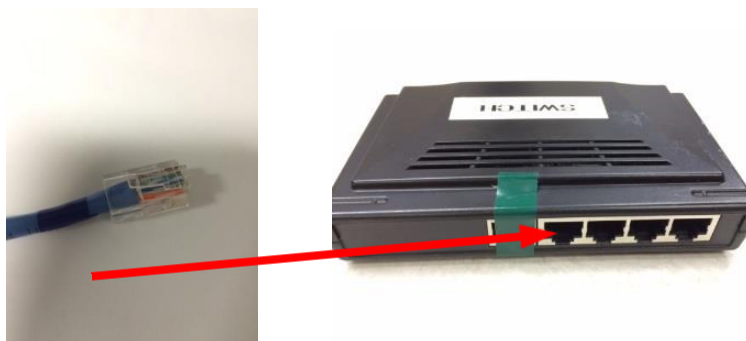
Setup Wired Switch (Lunch Bag)



- A. Plug the Switch power cord into the battery backup side of the surge protector and connect power cord to the side of the Switch.



- B. Verify the red power light is on.



- C. Plug all Ethernet cables into the back of the Switch

Setup (continued)

D. Only use the open Ethernet ports on the Switch



E. Plug one Ethernet cable into each EPB (laptop).

EPB Setup

1. Make sure EPB's have **Thumb Drivers**




Double Check Power Supply

Periodically check the power source on each EPB. If you find that an EPB is operating on battery power, check all power connections.

VERIFY power available and battery charge status by checking the icon in the bottom right corner of the screen.

 Plugged in (Battery 100%)
AC Power Available

 Battery 97%
Operating on Battery

CORRECT

NOT GOOD

EPB Power Up

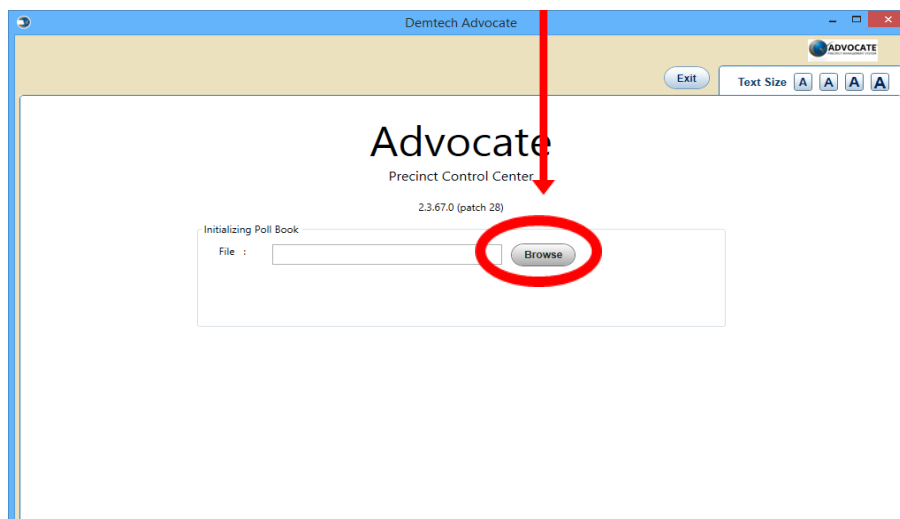
- Open the laptops and the press Power Button to turn on the EPBs. On the laptops look for the circle with the dot in the middle. (Top Right or Left) This is your Power Button



- After pushing the Power Button on the EPB's, wait for about a minute and you should see the Advocate "Browse" screen open automatically.

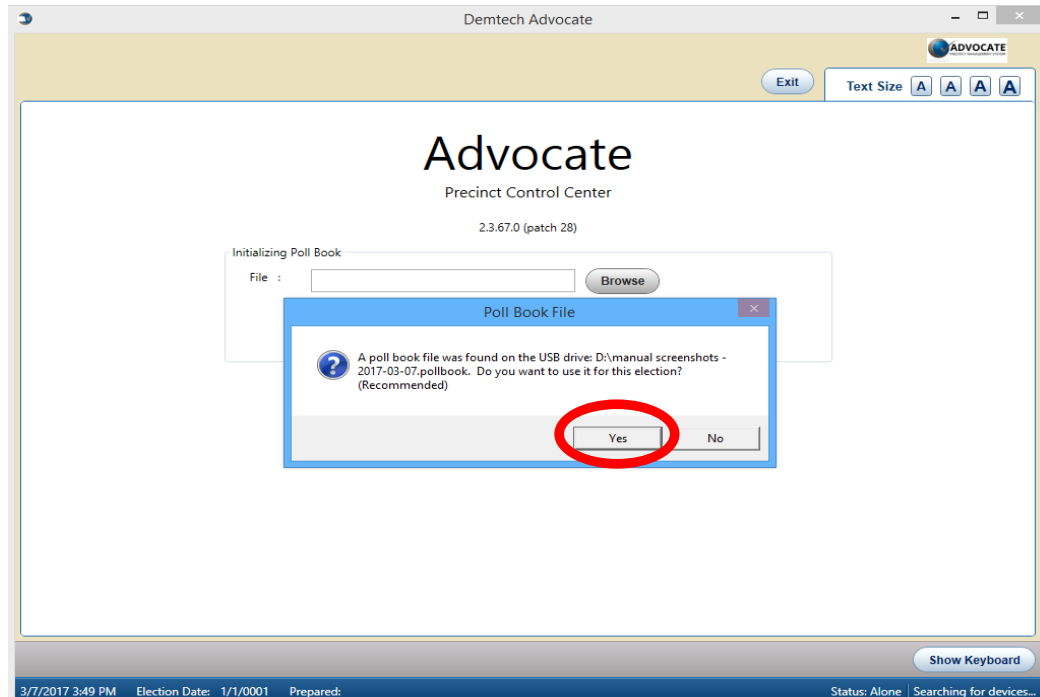
Launching Advocate

- Left-click the "Browse" button on each of your laptops (Shown circled below).



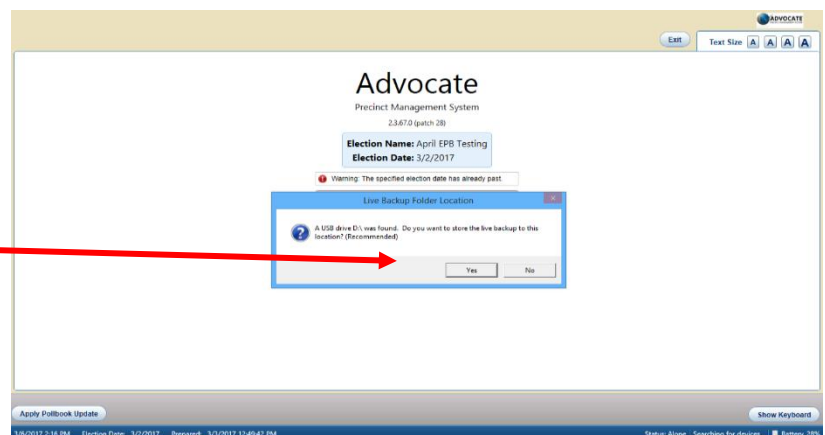
Launching Advocate (continued)

- When prompted that “A Pollbook file was found” in the second dialog box, left click the “Yes” button (Shown circled below).



NOTE: IT TAKES A FEW MOMENTS (2 Minutes) FOR THE LOG-IN SCREEN TO DISPLAY – PLEASE BE PATIENT.

- A pop-up will ask if you want to store a backup on the USB drive, click on “Yes.”



Launching Advocate (continued)

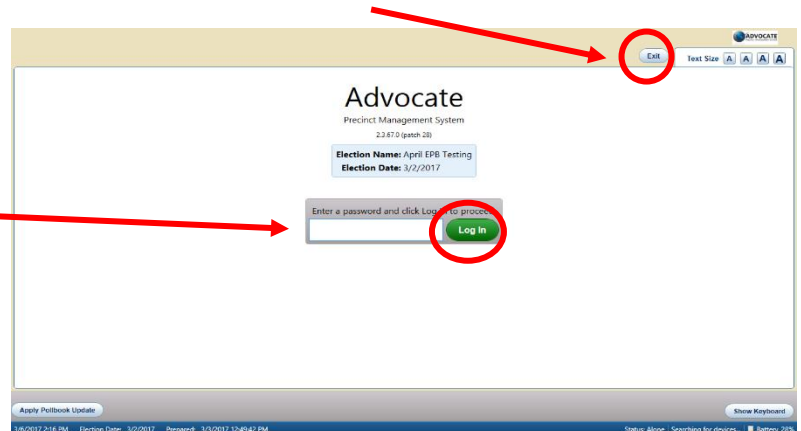
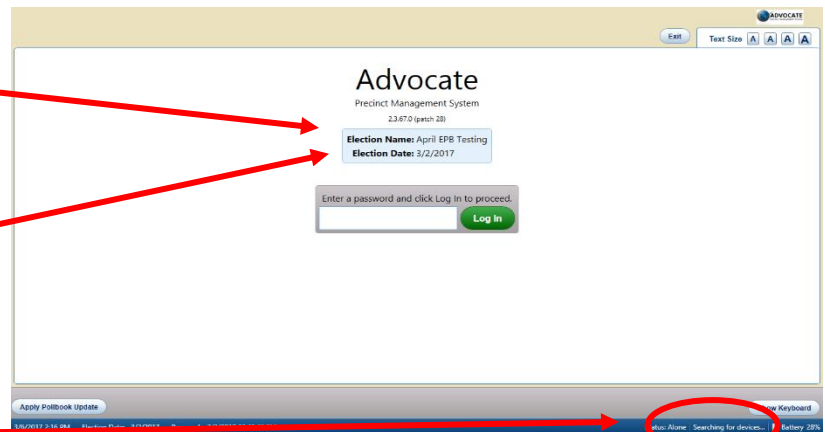
Launching Advocate (continued)

- Verify the Election name on ALL EPBs in the precinct.
- Verify the Election date matches the actual date.
- Make sure ALL EPBs show “Status: Connected, searching for Devices” (At the very bottom of the screen on the blue ribbon) This should take **NO LONGER THAN** 2 minutes.

If it shows “Alone” after 2 minutes:

- Check Ethernet Connections on the EPB’s and Switch
- If connections are good, but still alone, Exit Advocate
- Restart Laptops

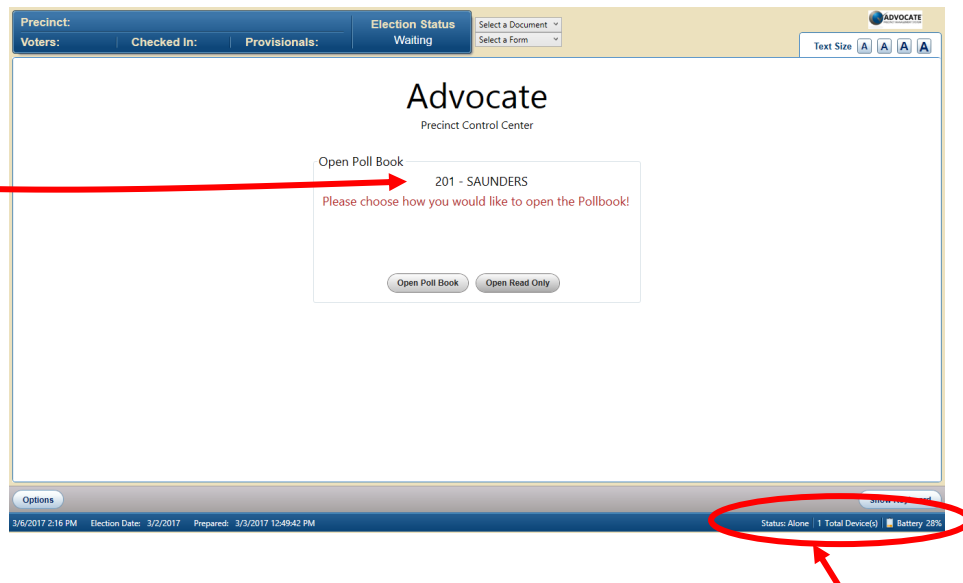
- Log In Using the Opening Password provided by the Chief (# 7 Envelope).



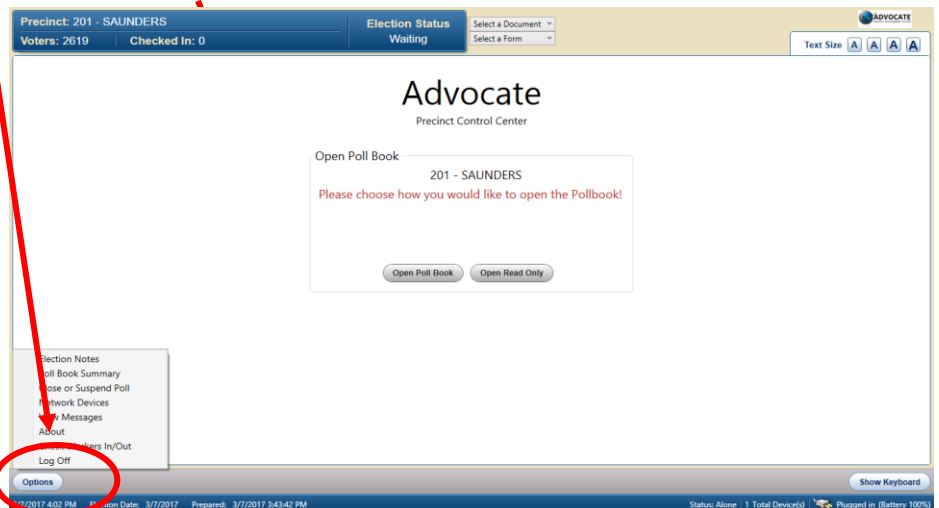
Opening Pollbook

Verify:

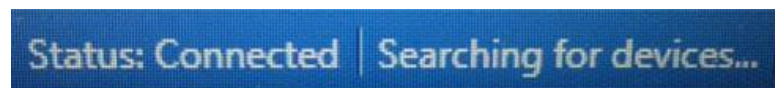
- The Precinct name is correct on all EPBs.



- The Number of Pollbooks should match this number. This shows the laptops are connected and talking to each other.
- If the numbers do not match you can try restarting Advocate by clicking “Log off” in the Options menu (Found bottom left of screen) and then reopen advocate by double clicking the short cut on the top left of the windows screen.

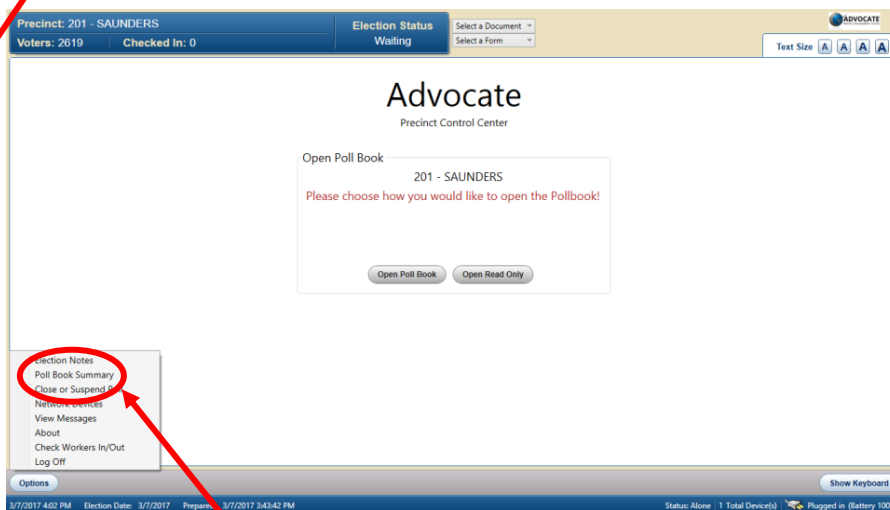


- If you see “Searching for Devices” just wait a couple of seconds.

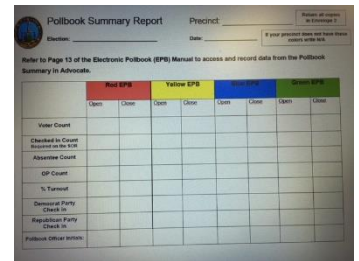


Opening Pollbook (continued)

- If the numbers match, left-click on the Options button on the bottom left of the screen

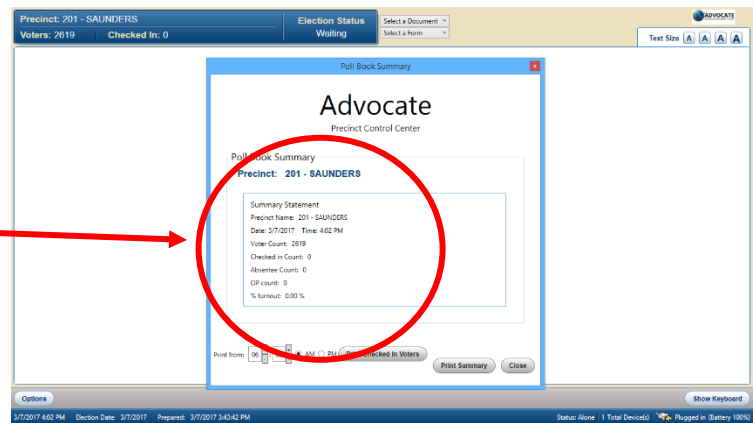


- Click on “Pollbook Summary” from the list that pops up to display the numbers for your paper Pollbook Summary Report (Red Plastic Folder). Do this on each EPB.



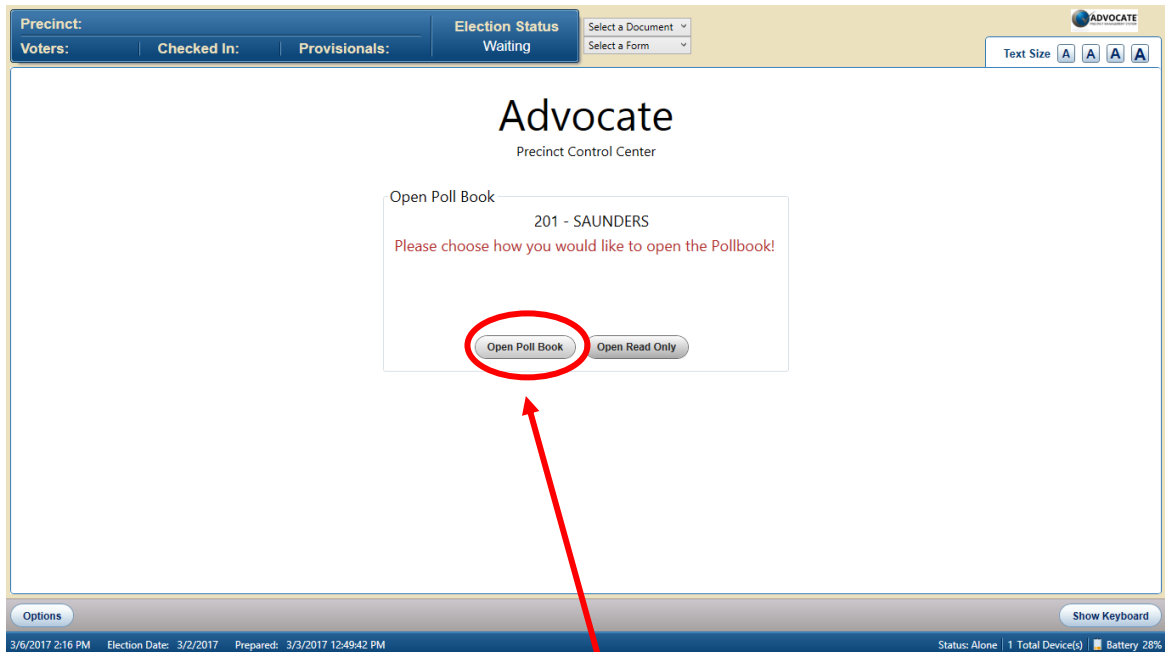
- Copy the numbers from each EPB, according to its color onto the report before you open the polls. The numbers should all be zeros except for “Voter Count” for Precinct Count.” **If a Voter is already checked-in when you open, IMMEDIATELY call the Chief HQ.**

- Fill out the Pollbook Summary Report using the information in the pop-up window.



Open Pollbook (continued)

- Left-click on the “Close” button to return to the “Open Pollbook Screen”.



- On ONLY ONE EPB click on the “Open Pollbook” button and wait a few moments. This will open the polls on all the connected EPBs

If the polls do not open on all the EPBs, call office immediately

- **If Absentee count numbers do not match** you need to perform an Absentee Voter Lookup (Do this before 6AM)
- Go to “Advanced Search” and in the field next to “Absentee” type the word “True”

- This provides a list of AB voters that should be checked against the list provided (Found in the Chief’s binder)

Routine Operation

DO NOT MOVE FORWARD IF YOU HAVE NOT DONE YOUR POLLBOOK SUMMARY REPORT!

If you have not completed your Pollbook Summary Report, click on “Options” then select “Pollbook Summary” and fill out the Pollbook Summary Report for the SOR before checking in the first voter. Click “Close” button to return to previous screen

POLLS ARE NOW OPEN!

1. Obtain Voter ID. If the Voter has NO acceptable ID - Send the voter to the Chief.

Precinct: 201 - SAUNDERS
Voters: 2019 Checked in: 0
Election Status: Open
Select a Document
Select a Form

Search
Simple
Example: Smith, Amanda, Jean, 1980 or Smith, Amanda, Jean, 11/23/1980 or Prospect Street, 2010
Advanced

Text Size A A A A
Search Search Clear
Search Scope: Precinct All

Voter ID	Last Name	First Name	Address	YOB
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0 Matches | Page 1 of 1

Options Show Keyboard
3/6/2017 2:17 PM Election Date: 3/2/2017 Prepared: 3/3/2017 12:49:42 PM Status: Alone 1 Total Device(s) Battery: 28%

2. Look up Voter in EPB

- Either scan the Voter's ID or start by typing the Voter's last name using **3,3 Tip** (e.g., First 3 Letters Last Name Comma First 3 Letters First Name) **Example: Michael Mallon - MAL,MIC**
- The EPB screen will automatically populate with matching names.

List
Screen

Precinct: 201 - SAUNDERS
Voters: 2019 Checked in: 0
Election Status: Open
Select a Document
Select a Form

Search
Simple
Example: Smith, Amanda, Jean, 1980 or Smith, Amanda, Jean, 11/23/1980 or Prospect Street, 2010
Advanced

Text Size A A A A
Search Search Clear
Search Scope: Precinct All

Voter ID	Last Name	First Name	Address	YOB
01660445	WILSON	ANTHONY	5921 Riverside Dr	1966
603013540	WILSON	LANA	5839 Riverside Dr	1964
177223149	WILSON	MATTHEW	5839 Riverside Dr	1990
603013540	WILSON	ROBIN	5839 Riverside Dr	1959
031872615	WILSON	TOMEKA	5789 Rockcliff Ln	1969

5 Matches | Page 1 of 1

Options Show Keyboard
3/6/2017 2:17 PM Election Date: 3/2/2017 Prepared: 3/3/2017 12:49:42 PM Status: Alone 1 Total Device(s) Battery: 28%

Routine Operation (continued)

- Beware of spelling anomalies like **O'HARA vs. OHARA**
- Click on [Next Page >](#) to scroll the voter list
- Display the Voter Details screen by clicking on the Voter Name from the list screen, if you scanned the Voter's ID the Voter Details screen will open automatically.
- If the wrong Voter Details screen opens, click "Back to List".

Voter Details Screen

Precinct: 201 - SAUNDERS
Voters: 2619 Checked In: 0 Election Status: Open

Voter Details

Voter ID: 177223149	Status: Active	Precinct: 201 - SAUNDERS
Last Name: WILSON	Address: [REDACTED]	Congress: 11
First Name: MATTHEW	City Zip: [REDACTED]	Senate: 029
Middle Name: LEE	Mailing: [REDACTED]	House: 031
YOB: 1990	City Zip: [REDACTED]	Election: 2017 June Republican Primary
Gender: M		Checked: False (No)
		Absentee: False- (No)

Voter Messages

✓ Ready to Check In

✓ Check Voter In

Election Day Flags

- ☐ OP - Voted outside polls
- ☐ Signed 'Affirmation of Eligibility' or other statement

[Voter Notes](#)

[Same Address](#) [Back To List](#)

Options [Show Keyboard](#)

3/6/2017 2:17 PM Election Date: 3/2/2017 Prepared: 3/3/2017 12:49:42 PM Status: Alone | 1 Total Device(s) Battery 28%

1. To qualify the Voter, verify the voter meets ID requirements.
- IF THE VOTER'S NAME AND ADDRESS INFORMATION IS CORRECT, **REPEAT REQUIRED INFORMATION BACK TO VOTER.**
 - Verify the Election District Information to determine which ballot to give the voter (if necessary).

Routine Operation (continued)

2. Confirm Voter (see below)

Precinct: 201 - SAUNDERS
Voters: 2619 Checked In: 0 Election Status: Open

Voter Details

Voter ID: 177223149
Last Name: WILSON
First Name: MATTHEW
Middle Name: LEE
YOB: 1990
Gender: M

Status: Active
Address: [REDACTED]
City Zip: [REDACTED]
Mailing: [REDACTED]
City Zip: [REDACTED]

Precinct: 201 - SAUNDERS
Congress: 11
Senate: 029
House: 031
Election: 2017 June Republican Primary
Checked: False (No)
Absentee: False (No)

Click Confirm to check voter in. **Confirm** Cancel

Options Show Keyboard

3/6/2017 2:17 PM Election Date: 3/2/2017 Prepared: 3/3/2017 12:49:42 PM Status: Alone 1 Total Device(s) Battery: 28%

3. Default search screen should appear after confirming (see example below)

Precinct: 201 - SAUNDERS
Voters: 2619 Checked In: 0 Election Status: Open

Search

Simple
Example: Smith, Amanda, Jean, 1980 or Smith, Amanda, Jean, 11/23/1980 or Prospekt Street, 2010

Advanced

Search Scope: Precinct: [REDACTED] All

Voter ID	Last Name	First Name	Address	YOB
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0 Matches | Page 1 of 1

Options Show Keyboard

3/6/2017 2:17 PM Election Date: 3/2/2017 Prepared: 3/3/2017 12:49:42 PM Status: Alone 1 Total Device(s) Battery: 28%

Next Voter in Line, Please!

*** If** you feel that the VOTER was not Checked-In correctly you can **VERIFY** by one of 2 steps listed in the next page:

1. Rescan the ID - Red Exclamation point displayed in voter messages section indicates voter has been checked in (example below).

Precinct: 211 - SIGNAL HILL
Voters: 3213 | Checked In: 5 | Election Status: Open

Voter Details

Voter ID: 430112728 | Status: Active | Precinct: 211 - SIGNAL HILL
Last Name: ALVAREZ MALDONADO | Address: [REDACTED] | Congress: 10
First Name: JONATHAN | City Zip: [REDACTED] | Senate: 029
Middle Name: FRANCISCO | Mailing: [REDACTED] | House: 013
YOB: 1988 | City Zip: [REDACTED] | Election: 2020 November General
Gender: M | Checked: True (Yes) | Absentee: False- (No)

Voter Messages

Checked In 8/31/2020 1:48:37 PM

Election Day Flags

☐ OP - Voted outside polls
☐ Signed 'Affirmation of Eligibility' or other statement

Undo Check In | Same Address | Back To List

2. Manual search and if name appears highlighted RED from list, it means that voter has been checked in (example below).

602013540	WILSON	LANA	[REDACTED]	1964
177223149	WILSON	MATTHEW	[REDACTED]	1990
603013540	WILSON	ROBIN	[REDACTED]	1959

Dual Primary Voters (ONLY FOR PRIMARIES!!!)

- **Dual Primaries-** If there is a Dual primary anywhere in the county, all Pollbooks will be set for a dual primary. Even if your precinct is holding a single primary, you will have to select the proper primary for each voter. Follow normal check-in procedures. The following box will appear when checking in the voter. Choose the proper primary. Once selected, the party will be shaded dark blue. Click “Continue” and then “Confirm” to continue check in process!

- This dropdown box will appear

- Select the correct primary

- Then click “continue”
- Finally click confirm to complete the check in process

Closing the EPB

NOTE

Make sure polls are closed and all voters have left. Record data from Pollbook Summary for Pollbook Summary Report and SORs

- To Access the Pollbook Summary on each EPB click on and select

Poll Book Summary

Closing the EPB (continued)

The screenshot shows the 'Advocate Precinct Control Center' interface. At the top, it says 'Advocate Precinct Control Center'. Below that is a 'Poll Book Summary' section for 'Precinct: 510 - STADIUM'. Inside this section is a box containing the following data: 'Poll Book Summary', '4/10/2012 10:41 AM', 'Precinct: 510 - STADIUM', 'Voter Count: 2842', 'Checked in Count: 5', 'Absentee Count: 73', 'Provisional Count: 0', 'OP count: 0', and '% turnout: 0.18 %'. At the bottom of the screen, there is a 'Print from:' section with a time selector set to 06:00 AM, a 'Print Checked In Voters' button, a 'Print Summary' button, and a 'Close' button.

- Compare with other EPB screens – **VERIFY they ALL agree.**

The screenshot shows the 'Pollbook Summary Report' screen. It has a table with columns for 'Red EPB', 'Yellow EPB', 'Blue EPB', and 'Green EPB'. Each column has 'Open' and 'Close' buttons. A red arrow points to the 'Checked in Count' row in the table. To the left of the table is a list of data points: 'Checked in Count', 'Absentee Count', 'OP Count', and '% Turnout'. At the bottom of the screen, there is a status bar showing 'Status: Connected', '3 Total Device(s)', and 'Battery 88%'. There is also an 'Options' button.

- Record data from Pollbook Summary for Pollbook Summary Report and SOR
- Check with Chief – make sure all entries required by the Statement of Results (SOR) are recorded on both the SOR.
- On each EPB Click on the Close button.
- Look on the bottom of the screen to make sure it says (Or more devices if you have additional EPBs)
- On only one EPB left-click on **Options** to pull up the menu
- Click on “Close or Suspend Poll”(see example on next page)

Closing the EPB (continued)

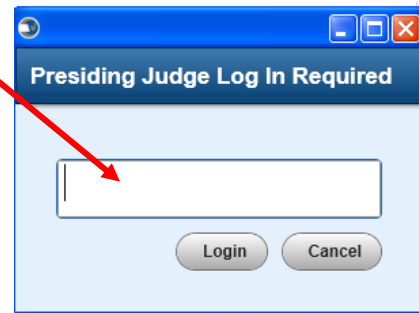
The screenshot shows the Advocate Precinct Control Center interface. At the top, it displays 'Precinct: 201 - SAUNDERS', 'Voters: 2619', and 'Checked In: 0'. The 'Election Status' is 'Open'. A search bar is visible with a 'Search' button and a 'Clear' button. A sidebar on the left contains a menu with options: 'Election Notes', 'Poll Book Summary', 'Close or Suspend Poll' (highlighted), 'Network Devices', 'View Messages', 'About', 'Check Workers In/Out', and 'Log Off'. A red arrow points to the 'Close or Suspend Poll' option. Another red arrow points to a text box that reads: 'You may suspend the polls and resume using this dialogue box, and also close the polls at the end of the election. Usted puede suspender las urnas y volver a utilizar este cuadro de diálogo, y también cerrar las urnas al final de las elecciones.' The bottom status bar shows '3/7/2017 4:38 PM', 'Election Date: 3/7/2017', 'Prepared: 3/7/2017 3:43:42 PM', 'Status: Alone | 1 Total Device(s)', and 'Plugged in (Battery 100%)'.

- The Close Poll Screen will open. Click on the Close Poll button to Continue

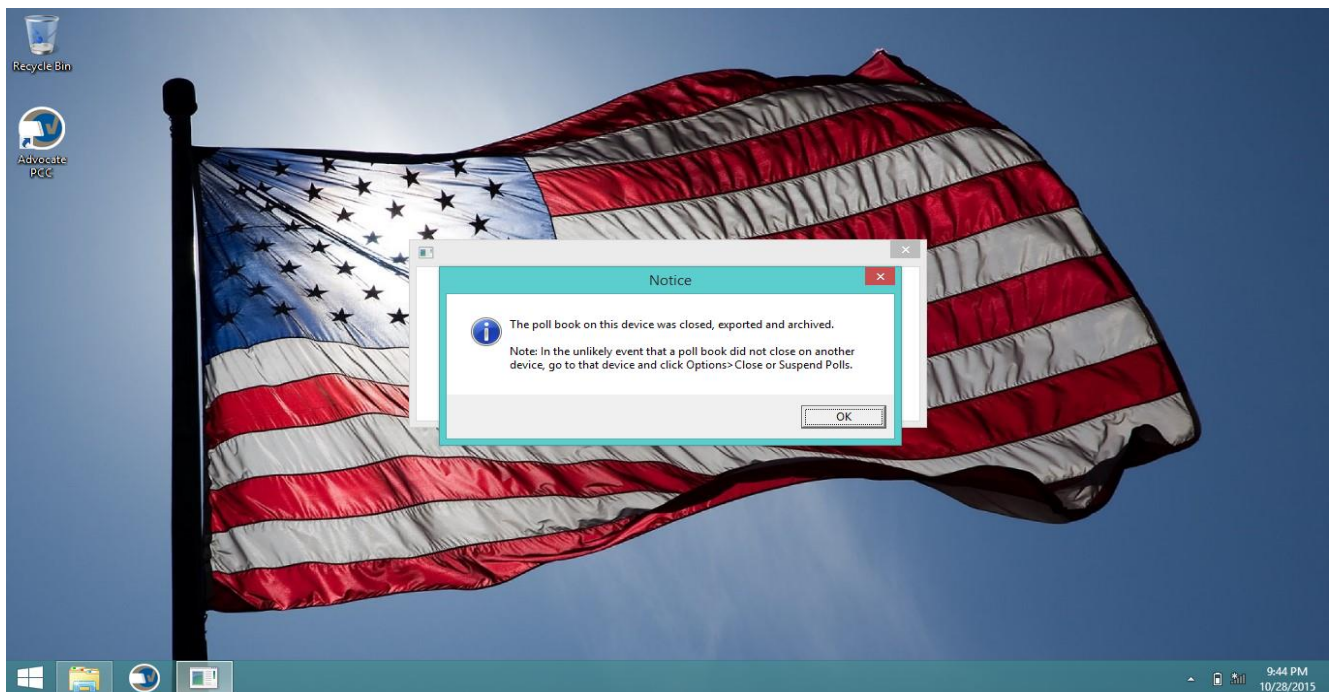
The screenshot shows a 'Close Poll' dialog box titled 'Advocate Precinct Control Center'. The dialog box contains the text: 'Select Close Poll to permanently end voting for this election. Select Suspend Poll to suspend the polls but not close them entirely.' Below this text are two buttons: 'Close Poll' and 'Suspend Poll'. The 'Close Poll' button is circled in red. A red arrow points from the text 'Click on the Close Poll button to Continue' to the 'Close Poll' button. At the bottom right of the dialog box is a 'Cancel' button.

Closing the EPB (continued)

- Type the **Chief Password** into the login box and click “Login”
Ask Chief for the password



- After a few minutes the following screen should appear on all EPBs
- If the screen appears on all EPBs continue; if an EPB does not close repeat the same steps on each EPB until all EPBs are closed



- Click on the “OK” button on ALL EPBs
- The election has been exported!

Closing the EPB (continued)

- Perform a normal Windows shutdown on the EPB's:
 - Click on the “Windows” icon on the bottom left of the screen

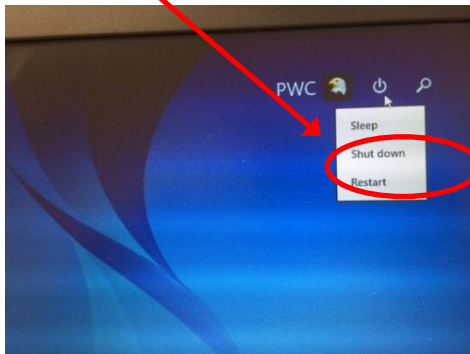


- This will open the screen below, click on the “Power Icon” on the top right of the screen



Closing the EPB (continued)

- Click on “Shut down” from the drop down list



- Wait for computer to turn off
- Remove EPB thumb drives (already installed on laptop)



- **LAST STEP:** Re-pack the EPBs and accessories **AS THEY WERE DELIVERED.**
- Pack the EPB flash drives in the **EPB Thumb Drive Clear Baggie** (example below).



- **DO NOT Pack** the EPB Thumb Drive Baggie in **Envelope #2**

EMERGENCY EVACUATION FOR EPB

- Let Chief HQ know of the situation
- Follow all evacuation instructions and do the following for the EPBs:
 - Leave them ON
 - LEAVE THE FLASH DRIVES PLUGGED IN
 - Unplug connections from the laptop unit
 - Stack and carry out just as you would a paper Poll Book.
 - Carry them out with the flash drive away from your body

After you are safely out of the building and have established a site outside to handle voters:

Power down all but one of the units and use one of the Lenovo laptops to look up and check-in voters. As the battery starts to deteriorate, turn on the other Lenovo and power down the first one. Repeat this action with the third unit, if necessary.

Upon re-admittance to the building, verify the switch is still on, power up the switch and all the laptops and let them re-synchronize with each other over the wireless connection.

You may need to “Log Off” Advocate and re launch the EPBs in order to sync them.

Common Icons



Ready to be checked-in



Can be checked-in if verified



Voter is properly checked in. Cannot Check-in Without Chief Involvement, or the (Red = Ready)



Absentee

Chief Function

S=Statement or OP = Outside Poll

- **For Chiefs:** If a voter completes ANY form or votes Curbside, you must check the appropriate Election Day Flag check box
- At the voter's detail screen left-click on the box next to the appropriate Voter Flag

Precinct: 201 - SAUNDERS
Voters: 2619 | Checked In: 0 | Election Status: Open

Voter Details

Voter ID: 177223149	Status: Active	Precinct: 201 - SAUNDERS
Last Name: WILSON	Address: [REDACTED]	Congress: 11
First Name: MATTHEW	City Zip: [REDACTED]	Senate: 029
Middle Name: LEE	Mailing: [REDACTED]	House: 031
YOB: 1990	City Zip: [REDACTED]	Election: 2017 June Republican Primary
Gender: M		Checked: False (No)
		Absentee: False- (No)

Election Day Flags

- ☐ OP - Voted outside polls
- ☐ Signed 'Affirmation of Eligibility' or other statement

Voter Messages

✓ Ready to Check In

✓ Check Voter In

Same Address | Back To List

Options | Show Keyboard

3/6/2017 2:17 PM | Election Date: 3/2/2017 | Prepared: 3/3/2017 12:49:42 PM | Status: Alone | 1 Total Device(s) | Battery 28%

- Check-In the Voter

OK. The Voter's name and address are validated;
You've set the "S" or "OP" flags, if necessary, and you've made sure the Voter is "Ready to Check in" and not previously checked in.

Click on the Check Voter In button.



Voter Already Checked In

Chief Function

- If a voter has already been checked-in, you can Undo Check in, but only if the voter is standing in front of you! Click Undo Check in at the bottom left and enter the Chief's password. Have the voter show ID.

The screenshot displays the Advocate software interface for Precinct 201 - SAUNDERS. The top navigation bar includes 'Voters: 2619', 'Checked In: 1', and 'Election Status: Open'. The 'Voter Details' section shows information for Voter ID 177223149, Last Name WILSON, First Name MATTHEW, Middle Name LEE, YOB 1990, and Gender M. The status is 'Active', and the address is 5839 Riverside Dr, Woodbridge 22193-3751. The election is the 2017 June Republican Primary. A modal dialog box titled 'Presiding Judge Log In Required' is centered on the screen, featuring a password input field and 'Login' and 'Cancel' buttons. A red arrow points from the 'Undo Check In' button at the bottom left to the 'Checked In' status in the 'Voter Messages' section. The 'Voter Messages' section shows a message: 'Checked In 3/7/2017 4:34:58 PM'. The bottom status bar shows the date 3/7/2017 4:37 PM, election date 3/7/2017, and prepared date 3/7/2017 3:43:42 PM.

Precinct: 201 - SAUNDERS
Voters: 2619 | Checked In: 1 | Election Status: Open

Select a Document
Select a Form

Text Size A A A A

Voter Details

Voter ID: 177223149
Last Name: WILSON
First Name: MATTHEW
Middle Name: LEE
YOB: 1990
Gender: M

Status: Active
Address: 5839 Riverside Dr
City Zip: Woodbridge 22193-3751
Mailing: City Zip:

Precinct: 201 - SAUNDERS
Congress: 11
Senate: 029
House: 031

Election: 2017 June Republican Primary
Checked: True-R (Yes)
Absentee: False- (No)

Election Day Flags

☐ OP - Voted outside polls
☐ Signed 'Affirmation of Eligibility' or other statement

Voter Messages

Checked In 3/7/2017 4:34:58 PM

Undo Check In | Same Address | Back To List

Options | Show Keyboard

3/7/2017 4:37 PM | Election Date: 3/7/2017 | Prepared: 3/7/2017 3:43:42 PM | Status: Alone | 1 Total Device(s) | Plugged in (Battery 100%)

Emergency EPB Steps

If the EPB's **will not sync** with the Ethernet switch, please call the office immediately for help. **The Polls MUST open at 6AM, never turn away a voter!**

EPB's will not sync – Call Chief HQ

EPB Connection Solutions

1) Open the polls with (2) EPB's - Directly connect two (2) EPB's via Ethernet cable



2) Open the polls with One (1) EPB

The Polls MUST open at 6AM, never turn away a voter!

Contact Numbers

Office of Elections

Prince William County (703)792-6470

City of Manassas (703)257-8230

Manassas Park (703)335-8806

Fairfax County (703)222-0776

Loudoun County (703)777-0380

Fauquier County (540)422-8290

Stafford County (540)658-4000