South Dakota AutoMARK Training Manual

The AutoMARK ballot assistant

Every voter in South Dakota receives a paper optical scan ballot at federal elections. The voter has the option to mark the ballot by hand or by use of the AutoMARK ballot assistant.

The AutoMARK assists a broad range of voters in marking their ballots independently and privately. Available in every polling place in South Dakota for any federal election, the AutoMARK may be provided for other elections.
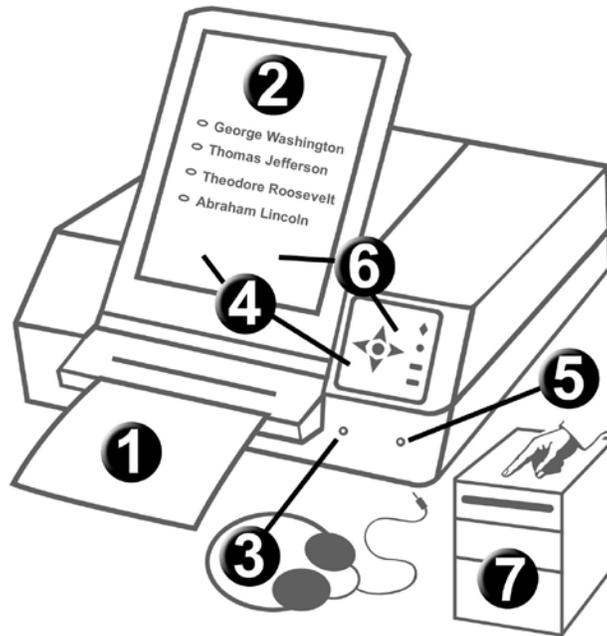
The AutoMARK keeps no record of votes. It is a paper-based electronic ballot marker—an "electronic pen." Most voters find it to be intuitive and user-friendly.

The AutoMARK has special features to assist voters who are blind, have poor eyesight, can't hold a pen, or have other difficulties in voting a paper ballot. All ballots—whether voted by pen or by AutoMARK—go into the same ballot box.

When a ballot is inserted into the AutoMARK, an electronic version appears on the screen. The pictures of the ballot contests can be enlarged for easier reading, shown in reverse contrast, or turned off for privacy if a voter chooses to access the ballot by attached headphones and keypad. The audio description of the ballot can be used in place of or in conjunction with the visual version on the screen. The voter makes selections through the touch screen or keypad. (A voter may also bring an A/B switch to access the AutoMARK.)

The AutoMARK warns of undervotes and will not allow overvotes. The voter may make changes before the ballot is marked. The voter is provided a summary of selections. When the voter selects Mark Ballot, the appropriate ovals on the optical scan paper ballot are marked and the ballot is ejected. If a marked ballot is inserted into the AutoMARK, the touch screen will display and the headphones will describe the selections marked on that ballot. The voter takes the official paper ballot to the precinct ballot box for casting. A ballot privacy sleeve is provided to all voters.
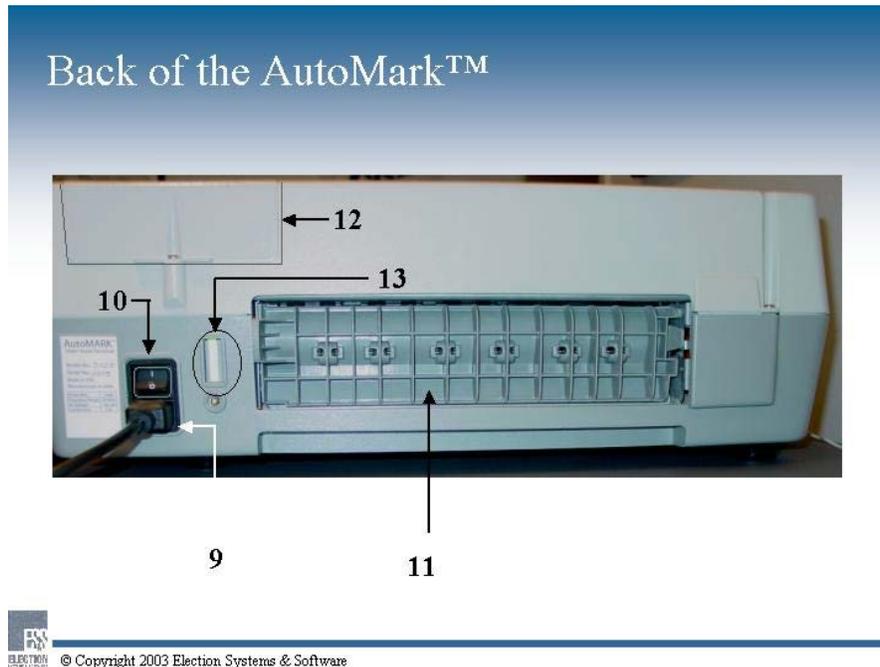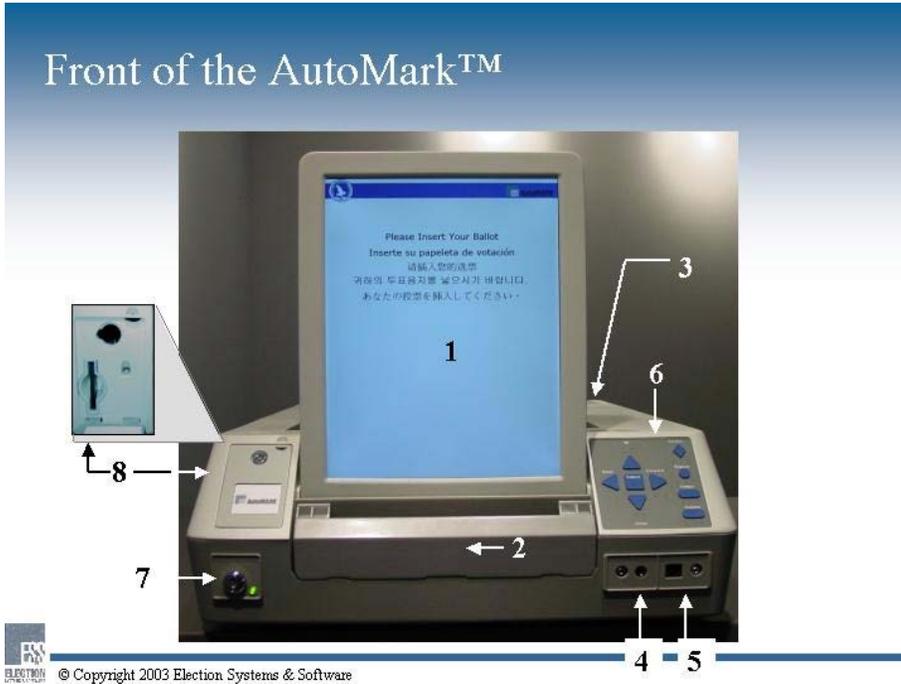
The ballot appears on a touch screen showing:
- George Washington
- Thomas Jefferson
- Theodore Roosevelt
- Abraham Lincoln

How does it work?

1 Insert your paper ballot into the AutoMARK.

2 Your ballot will appear on the touch screen.

3 If you would like the ballot read to you, plug in and put on the headphones.

4 Touch the screen or use the keypad to move through the ballot and select your choices.

5 You may use your own personal A/B - style switch to access the AutoMARK.

6 Verify your selections and press "Mark Ballot". The AutoMARK will mark and return your ballot.

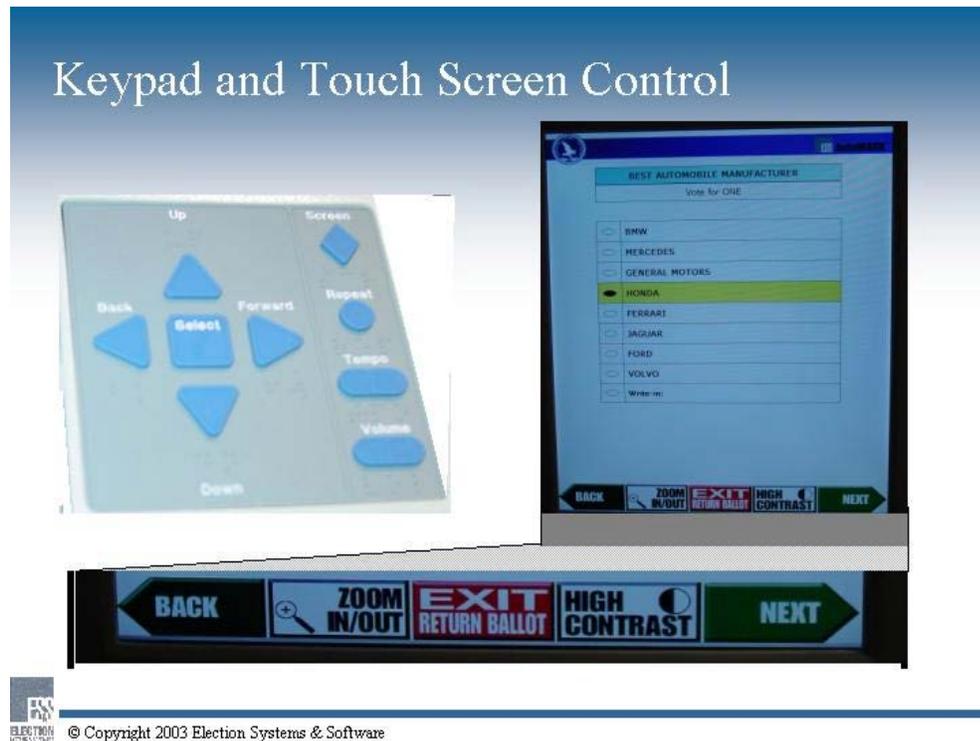**7** Remove your ballot and place it in the ballot box.

Parts of the AutoMARK

Referring to AutoMARK terminal parts by name when speaking with other poll workers and voters creates clear communication. The proper names for the AutoMARK parts will be used throughout this manual.

Front of the AutoMark™

Please Insert Your Ballot
Inserte su papeleta de votación

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Back of the AutoMark™

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Number	Item	Description
1	Touch Screen Monitor	Displays the ballot and the touch screen controls. The touch screen controls allow a voter to navigate the ballot by touching commands directly on the touch screen monitor.
2	Ballot Feed Tray	Place to insert and remove the ballot.
3	Top Access Panel	A movable part that exposes the internal paper tray that holds the ballot during voting.
4	Headphone Jack	Port to plug in headphones to utilize the audio feature of the AutoMARK.
5	A/B Jack	Port to plug in A/B devices such as a sip/puff device.
6	Keypad	Nine buttons used to navigate the ballot and control the audio features. The keypad and touch screen can be used interchangeably.
7	Mode Switch	Provides key access to control what mode the AutoMARK is in. When turned to ON, the terminal is used for voting or confirming a ballot has been voted. When turned to TEST, the terminal performs administrative functions. When turned to OFF, the AutoMARK performs no functions.
8	CompactFlash Card	A card, similar to a camera memory card, used to transfer important election files to the AutoMARK. The card is kept locked behind a door that requires a different key than the mode switch key. The door is sealed for the election.
9	AC Power	Location to connect the AC power cord to the AutoMARK.
10		(Not on SD machines)
11	Rear Access Panel	Paper guide used to flip over the ballot so both the front and back can be read/marked by the AutoMARK.
12	Print Cartridge Access Lid	Location of the print cartridge.
13	Battery Level Indicator	The AutoMARK charges automatically when plugged in.

Three Ways to Communicate With the AutoMARK

Keypad and Touch Screen Control

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The AutoMARK presents the ballot to the voter in two ways:

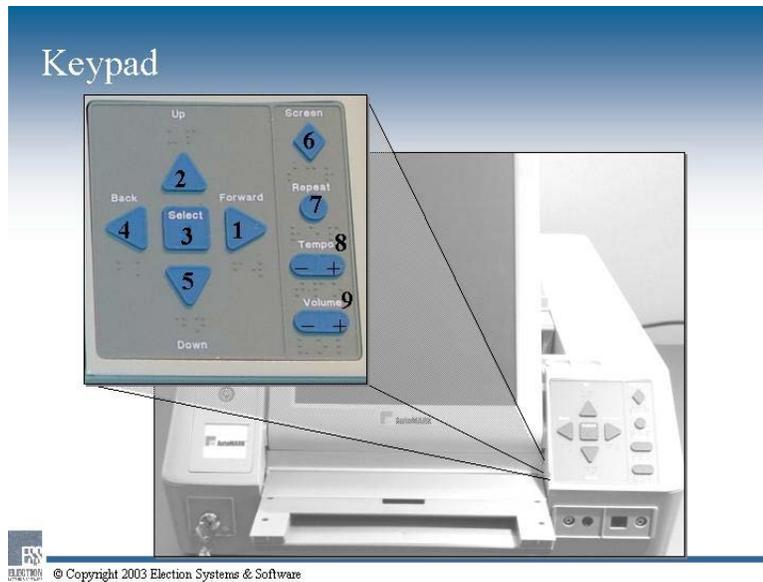1. Visually by the touch screen
2. Audibly by the headphones

The Voter makes selections on the AutoMARK in three ways:

1. By using the keypad
2. By touching the touch screen
3. By using an A/B switch

There are advantages to each mode of communication depending on the specific abilities of the voter. The options can be used interchangeably throughout the selection process.

Keypad

The keypad may be helpful for the voter who is unable to see the ballot on the touch screen. The buttons on the keypad have Braille abbreviations. Instructions given through the headphones describe the buttons and their functions. The diamond-shaped button blackens the touch screen for increased privacy. (Touching the diamond-shaped button four times in a row ejects the ballot.) All the information on the ballot is available through the keypad.

Keypad

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Nine buttons give the voter control over the selection process:

Number	Item	Description
1	Forward/Next	Progresses to the next section on the ballot or the next page when applicable.
2	Scroll Up	Moves up candidate / question options.
3	Select	Chooses one option from multiple choices.
4	Back	Moves back to the previous section on the ballot or the previous page when applicable.
5	Scroll Down	Moves down candidate / question options.
6	Screen Off/On	Turns the display screen on or off. A visually impaired voter may choose to blacken the screen while listening to the ballot being read through the headphones to ensure privacy.
7	Audio Repeat	Repeats the last audio file just read over the headphones.
8	Audio Tempo	Adjusts the speed of the audio (- decrease, + increase).
9	Volume	Adjusts the loudness of the audio (- decrease, + increase).

Touch Screen

The touch screen is probably the mode of choice for the voter who has both sight and ability to touch the screen. Communication is immediate as the voter can see the oval instantly marked by the touch of a finger. Two additional options for viewing which may help some voters:

1. The zoom feature—for enlarging the ballot
2. Reverse contrast—for displaying the ballot white on black

Touch screen control options:

Item	Description
Back	Displays the previous screen.
Zoom In/Out	Increases and decreases the size of the text displayed on the screen.
Exit Return to Ballot	Displays the Exit Screen.
High Contrast	Changes to white on black.
Next	Displays the next screen.

Headphones

Headphones will be available next to the AutoMARK on the AutoMARK Table. The cord should be on the table so that it is out of the way. The plug should be easily available but <u>not</u> plugged in, since—if the headphones are not on the voter's head--selections could be overheard by other persons. All information on the ballot is described by audio through the headphones, including the prompts necessary to navigate the ballot.

The touch screen displays the ballot in English. The voter who does not read English may need assistance in plugging in the headphones before beginning the voting session. The poll worker should be available for technical assistance. The poll worker should remove the audio plug from the audio jack after a voter has finished using the terminal if the voter does not remove the plug.
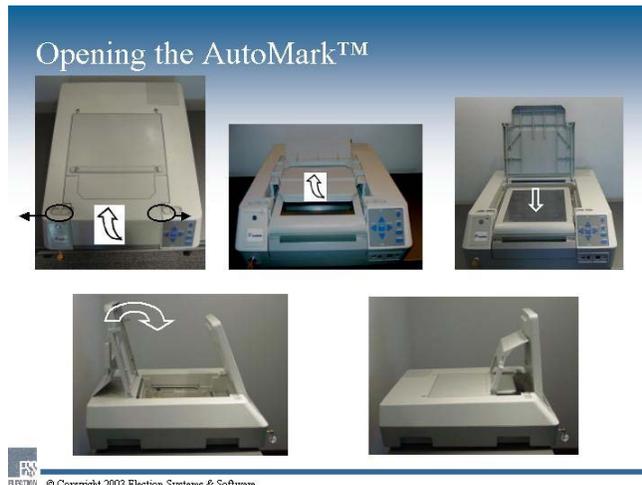
A/B Switch

The AutoMARK provides a jack to receive an A/B switch which a voter may bring to access the AutoMARK. Such a device is designed to the personal abilities of an individual person. Examples include a sip/puff device or a foot switch. The A/B device is used by the voter who is unable to use the keypad or the touch screen. All the information on the touch screen is available through a clockwise advance around the touch screen. The voter touches the advance button or the select button. The port for all A/B devices is the 3.5 mm jack farthest to the right. The voter using such a device may need assistance in plugging in the device, inserting the ballot, and removing the ballot.

Privacy Sleeve

The hard plastic or card stock privacy sleeve in general use throughout South Dakota can be used by all voters at the polling place. The privacy sleeve promotes the voter's privacy while allowing the official stamp to remain visible. The additional cardboard AutoMARK privacy sleeve, which is attachable to the AutoMARK by Velcro in preparation for receiving the voter's marked ballot, may provide increased privacy for certain voters who are unable to remove the ballot from the machine without assistance. This privacy sleeve should be available and should be offered to voters who might benefit from it.
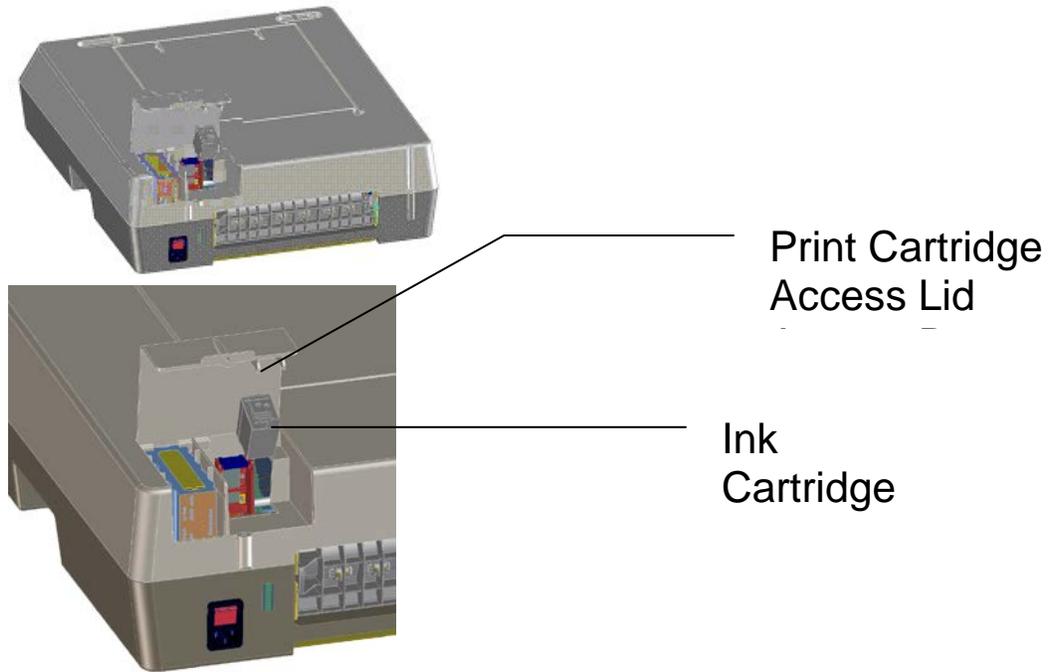
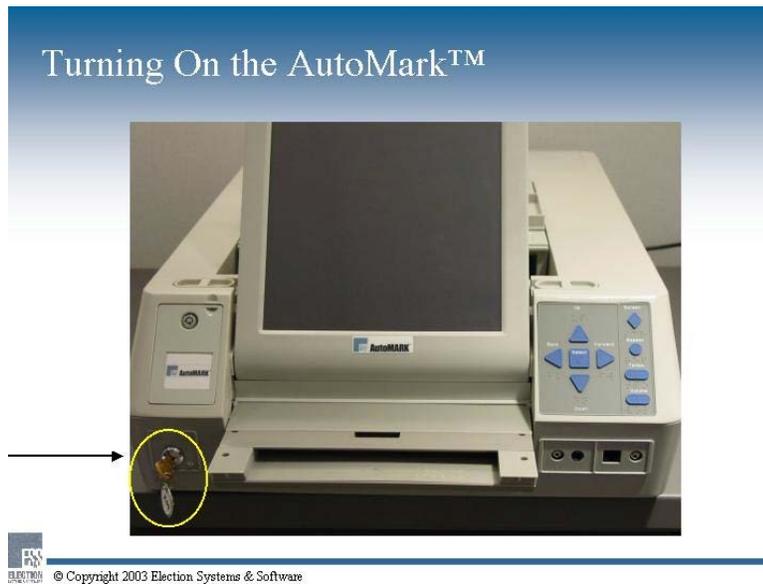## <u>Set Up the AutoMARK at the Polling Place</u>

1. Assemble the AutoMARK table and place it in a location so that when the AutoMARK is placed on the table, the touch screen will not be visible to persons other than the voter. Maintain sufficient clearance for the voter to access the voting area.
2. Open the AutoMARK case by squeezing the latches on each side. Have two persons remove the AutoMARK from its case and place it on the AutoMARK table, taking note that the front of the AutoMARK is above the side of the voter table with the INSTRUCTIONS TO THE VOTER label. The AutoMARK's four rubber feet set into the four indents on the AutoMARK table. Be careful not to pinch fingers as the unit is set down.
3. Move the latches securing the lid towards the edge to open the lid.
4. Lift the smaller flap of the lid.
5. Lift the entire lid away from you into a vertical position. The touch screen under the lid is now visible.
6. Lift the touch screen toward you into a vertical position.
7. Adjust the angle of the touch screen for voter viewing comfort.

Note: To adjust the screen, grip the monitor on either side with both of your hands and gently pull forward or push back until the screen is at the desired position.

8. Close the lid, leaving the touch screen monitor and the smaller flip up.
9. Lift and reposition the ballot feed tray so it is horizontal.
10. Place the privacy shield over the AutoMARK (not shown) – inserting the tabs into the tab slots in the table.
11. Check for print cartridge. Open the rear access door and verify that a print cartridge is installed. A new print cartridge is provided in your AutoMARK Election Day Polling Place Kit for whenever it may be needed.
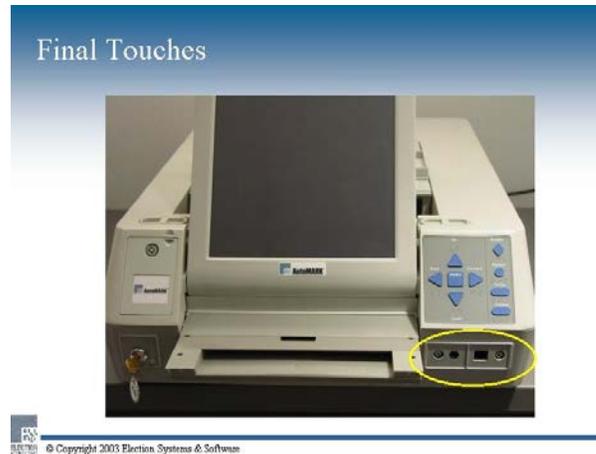
Print Cartridge
Access Lid

Ink
Cartridge

Start the AutoMARK

Turning On the AutoMark™

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1. Plug the AC power cord into the back of the AutoMARK and the other end of the cord into the wall.
2. Insert the gold mode switch key and turn to the middle or ON position. Be Patient ☺ (The screen will remain black for about one minute and then finally show boot progress.)

Prepare the AutoMARK for Voters

Position the headphones on the right side of the AutoMARK table but not kept plugged in.

Election Morning AutoMARK Test

Prior to the opening of the polls, the Precinct Superintendent must test the AutoMARK for proper operation using the following procedure:

1. Use only the test ballots provided by the person in charge of the election which are labeled "**TEST BALLOTS**". These will be provided in your AutoMARK Election Day Polling Place Kit.

2. Mark at least two "**TEST BALLOTS**" using the AutoMARK by selecting various candidates and ballot questions using the touchscreen, keypad and headphones.

3. When two "**TEST BALLOTS**" print properly, the AutoMARK is ready for use by voters. Store the **"TEST BALLOTS"** with your AutoMARK Election Day Polling Place Kit. DO NOT place the **"TEST BALLOTS"** in the ballot box.

4. If the AutoMARK does not properly mark the ballots, use the troubleshooting section found on page 89 to resolve the problem. If your troubleshooting is unsuccessful, call your County Auditor.

5. You must successfully mark two **"TEST BALLOTS"** before allowing voters to use the AutoMARK.

6. Even if the AutoMARK test is not successfully completed, open the polls at 7:00 am. Do not allow voters to use the AutoMARK until the test is successfully completed.

Voting with the AutoMARK

This module describes how the voter uses the AutoMARK during an election. **The poll worker should NOT be involved in the voting process.** The pollworker may answer questions on the **operation** of the AutoMARK at any time.

The voter is handed a paper optical scan ballot, proceeds to the AutoMARK and votes. The voter can use the audio feature using the provided headphones. The voter can use the keypad, the touch screen, or an A/B device to make selections on the ballot.

1. Feed the blank ballot into the ballot feed tray when the touch screen monitor displays the message **Please insert your ballot**.
2. Read or listen to the instructions for voting on the Voting Instructions screen, then press **Next**.
3. On the contest screen, the first office listed on the ballot displays and is read for your consideration. Select either the candidate's name or the oval next to the name to indicate your selection. Your selection will fill in the oval next to the name of your choice. Press **Next** and repeat this process until all contests and questions have been considered for the ballot.
4. The summary screen appears when you have considered all contests and questions for your ballot. Review this screen to confirm your selections.

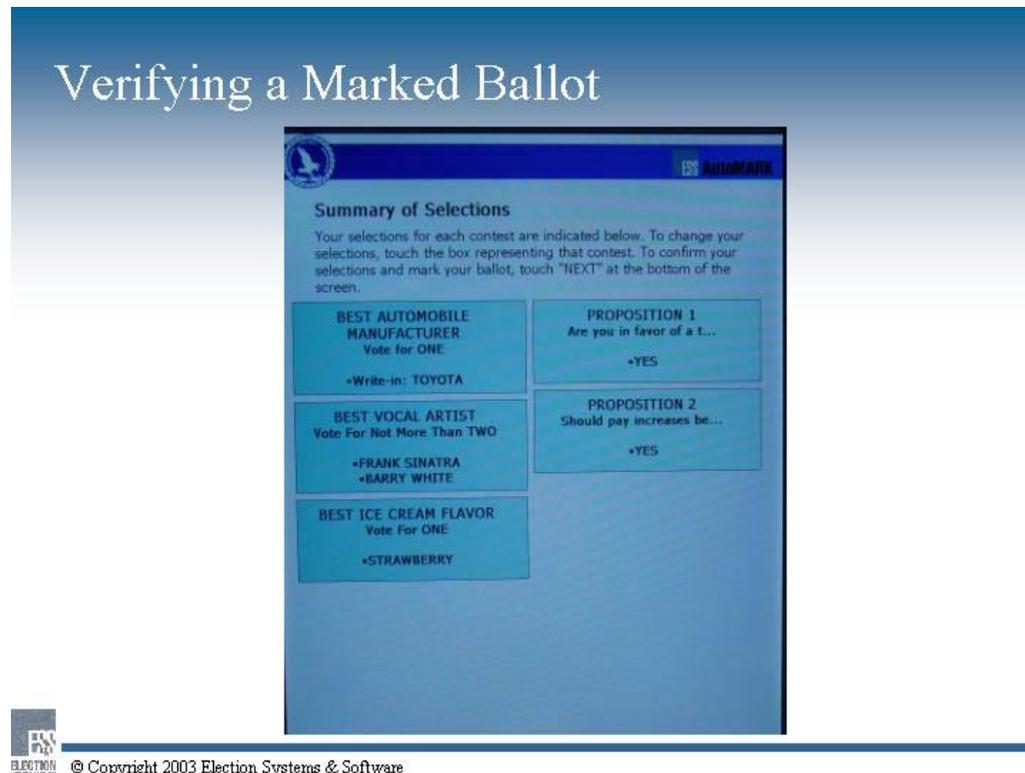   **Note:** No selections have been marked on your paper ballot at this point.

5. To change any selection:
   a. Press the contest you wish to change on the summary screen.
   b. Press your original selection to de-select your choice.
   c. Press your new choice and press **Next** to return to the summary screen.
6. When the selections are correct, press **Next**.
7. Press **Mark Ballot** on the mark ballot selection screen to print your selections onto the ballot.
8. Remove your ballot from the ballot feed tray when the screen displays **Remove Ballot**.
9. Insert your ballot into the privacy sleeve.
10. Deposit your marked ballot into the ballot box.

Pop-up Windows

Pop-up Window	Description	Action to Take
Force More Alert	You are required to view all candidates or choices on a ballot page. If you attempt to proceed to the next contest without viewing all choices, the Force more alert screen pops up.	Touch the **OK** button to return to the contest screen. Select **More** to view the additional candidates.
Overvote	If you attempt to select more candidates or choices than are permitted in a contest, the Overvote screen pops up.	Touch the **OK** button to display the previous contest screen. To change your selections, touch your previous choice to deselect the choice.
Exit	If you press the Exit button, the Exit screen pops up.	Touch the **Continue** button to return to the last screen displayed and continue the selection process OR Touch the **Exit** button to confirm your desire to exit the system and receive your *unmarked* ballot.
Exit Thank You	If you select **Exit** in the Exit pop up screen, the Exit thank you screen pops up.	Remove your unmarked ballot from the AutoMARK ballot feed tray.

Verifying the ballot is marked

For voter confidence, the AutoMARK provides the voter the opportunity to insert a marked ballot back into the AutoMARK to verify the marked selections. No changes can be made by the AutoMARK once a ballot has been marked. You may only view the summary screen and/or listen to your marked selections on the headphones. If you want to make changes, ask for a new ballot and begin the voting process over again.

To Verify a Marked Ballot:

1. Insert your marked ballot into the ballot feed tray.

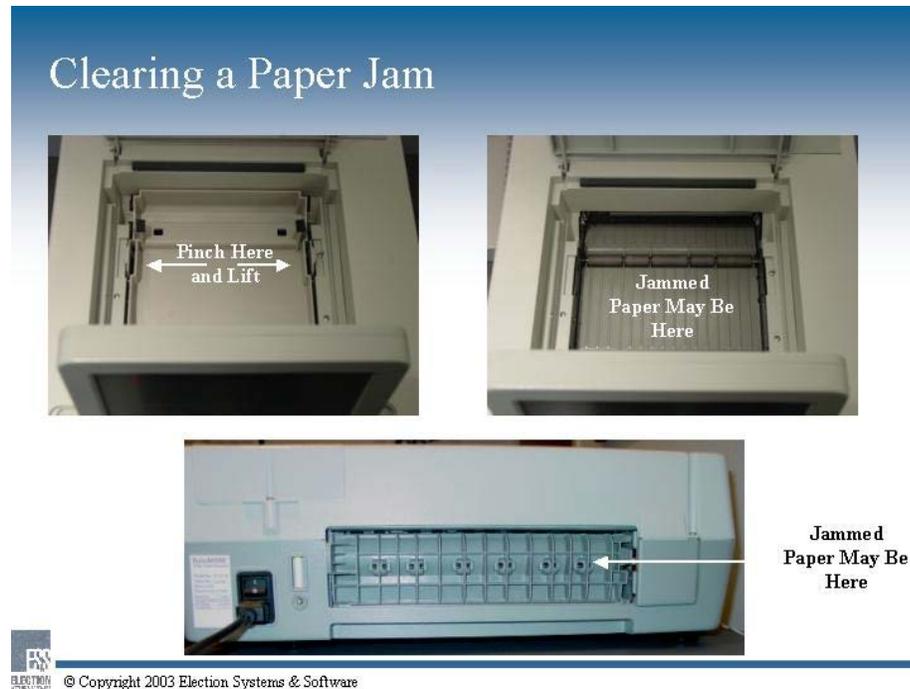   **Note**: A screen appears with instructions on how to verify the ballot.

2. Press **Next** to see the verification summary screen.
3. Review the selections that are marked on your ballot.
4. Press **Exit.**
5. Remove your ballot from the ballot feed tray when the screen displays **Remove Ballot**.
6. Place your ballot in the privacy sleeve and deposit your marked ballot into the ballot box.

Error – Paper Misfeed

A paper misfeed error message is received when the ballot is inserted incorrectly and the AutoMARK paper feeder is not aligned with the ballot for scanning operations.   Follow the instructions under Error-Paper Jam to correct.

Error – Paper Jam

A ballot jams in the AutoMARK when it cannot move to the next position. This can occur even when the ballot is inserted correctly. The error message "Paper Jam" appears on the screen.

Clearing a Paper Jam

Pinch Here and Lift

Jammed Paper May Be Here

Jammed Paper May Be Here

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To Clear a Paper Jam:

1. Use the gold mode switch key during an election:
    a. Turn the gold mode switch key to the **TEST** mode.
    b. Select **Eject Ballot** from the menu.
    c. Turn the gold mode switch key to the **ON** mode. Get the voter an un-creased ballot and let the voter try again. If this is NOT successful then proceed to step 2.
2. Open the top panel
    a. Lift the small flap and the lid to expose the inside of the AutoMARK.
    b. Pinch the tabs on both sides of the top panel to release the hold on the AutoMARK and carefully lift to remove.

    Hint: Please be careful when dealing with the tabs, pinch lightly.

    c. Remove the ballot.

      d. To replace the top panel slide the top panel back into place at a 30-degree angle to the front of the AutoMARK.

      e. Carefully put the panel back into place.

3. If the ballot is not in the top panel area, open the Rear Access Door.

      a. Remove the panel door by pushing the tab on the left side to the right and pull it out.

      b. Remove the ballot.

      c. Replace the panel door by inserting the two pins on the right side of the panel into the two holes on the right side and push left side firmly in and firmly to the left until the panel clicks.

If the ballot is not damaged or folded in any way, insert the ballot correctly.

Damaged Ballot

Remove the ballot from the terminal if it gets damaged or stuck. **DO NOT LOOK AT THE VOTER SELECTIONS EITHER ON THE BALLOT OR ON THE ES&S AUTOMARK TERMINAL.**

Spoiling of Ballots Specific to the AutoMARK

The voter who votes by AutoMARK has the same right to three ballots as the voter who votes by pen. In addition, any ballot damaged by the AutoMARK because of technical difficulties will not count against the voter's right to three ballots.

Abandoned Ballots Left in the AutoMARK

Whenever a voter chooses to vote by AutoMARK, a poll worker needs to watch the voter from a distance to be sure that the voter leaves the machine with the ballot. If the voter does not remove the ballot from the terminal, the poll worker should direct the voter back to the AutoMARK to complete the marking of the ballot--before another voter attempts to use the AutoMARK.

If a ballot is left in the AutoMARK, and the poll worker is unable to locate its owner, the poll worker must remove the ballot from the AutoMARK and deposit it into the ballot box. The poll worker must verify that the ballot has the official stamp. The poll worker may in no way whatsoever use a pen or the AutoMARK to mark anything on the ballot.

There are various stages to which the ballot may have progressed during the voter's session on the machine:

1. The voter selected Mark Ballot or EXIT but did not wait for the ballot to eject from the machine. The ballot may now be hanging out of the machine. The ballot may or may not have been marked.

2. The voter did not select Mark Ballot and the ballot remains in the machine. (The machine will not accept another ballot when a ballot remains in the machine.)

If the ballot remains in the AutoMARK, the machine could be in one of three states, which are time dependent:

1. In the midst of the selection or verification process.
2. In the dormant mode between 5 and 10 minutes.
   The machine will display the message: "**ALERT**. No inputs have been received for the past five minutes. Please click **OKAY** below if you need more time." (If the voter were available, the voter could touch the OK button and resume the voting process.) However, since at this point the voter has abandoned the voting session, the poll worker should not touch this button.
3. Locked up after 10 minutes.
   After 10 minutes without interaction, the AutoMARK will display the message: "**Alert**! A problem has occurred. Please notify an election official. Election Official: A previous voting session has expired and the ballot is being held within the Voter Assist Terminal. Use the Test Mode to eject the ballot." (At this point, any selections from the abandoned session are forgotten.)

In the case of any of the 3 states described above, the poll worker must perform the following procedure:

Insert the Mode Switch Key, turn to TEST, press Eject Ballot, and remove the ballot.

The ballot will come out blank--unless the voter had reinserted a marked ballot for verification and then abandoned the ballot. In any and all cases, the procedure is the same:

The ballot must be taken and deposited into the ballot box.

If the ballot is jammed in the machine (or becomes jammed in the machine in the process of ejecting it) and the poll worker has to manually remove the ballot through one of the access panels, this ballot also (in whatever condition it might be--even if mangled) must be taken and deposited into the ballot box, since the voter is not present to authorize the spoiling of the ballot.

Troubleshooting Chart

Check the following two possibilities first to resolve a problem then refer to the troubleshooting chart:

1. Make sure the rear access door is in place. If it out of place just a little bit, which can occur during transport, this can cause a variety of problems. Take it out and put it back in, pushing firmly to the left and jiggling it into place.

2. Printing problems: This may have to do with the print cartridge, print calibration, or the print validation scanner. If you have any kind of print problem, try marking another ballot. Printing problems will sometimes correct themselves as additional ballots are marked. If still unsuccessful, remove the print cartridge and wipe the contact surface with a damp paper towel. Try another ballot. If you still have a printing problem, replace the print cartridge with a new one. Try another ballot.

PROBLEM	POSSIBLE CAUSE	SOLUTIONS
When attempting to verify the ballot, the markings cannot be read by the AutoMARK	The ballot style might not be accepted on that compact flashcard OR the optical scanners in the AutoMARK might be malfunctioning	Ensure the voter used the correct ballot and if not, have the voter vote on the correct ballot. If the ballot style is acceptable, have the AutoMARK serviced.
AutoMARK will not turn on without the AC plug plugged in	Battery is low	Recharge or replace the battery.
Display is out of focus	Unknown	Have the AutoMARK serviced.
The AutoMARK does not respond when the screen selections are touched	Unknown	Turn the system off, wait 15 seconds and then turn the system on again. If restarting the AutoMARK does not fix the problem, have the terminal serviced.
The AutoMARK does not respond when the keypad selections are touched	Unknown	Turn the system off, wait 15 seconds and then turn the system on again. If restarting the AutoMARK does not fix the problem, have the terminal serviced.
Unable to hear the audio	Headphones are not properly inserted into the audio jack	Make sure the plug is pushed <u>all</u> the way into the audio jack (to the left) and <u>not</u> in the A/B jack (to the right). Turn the system off, wait 15 seconds and then turn the system on again. If restarting the AutoMARK does not fix the problem, have the terminal serviced.
You hear a "hissing" noise coming from inside the AutoMARK **OR** when the gold mode switch key is turned to the **TEST** position, the test mode fails to pull up **OR** the AutoMARK "locks up" **OR** the compact flashcard has been removed while the terminal is **ON OR** there is an error reading the compact flash card when the AutoMARK is turned on.	The AutoMARK needs to be reset.	Turn the key switch to the **OFF** position. Wait 15 seconds and turn the key to the **ON** position.

Shut Down the AutoMARK

To shut down the AutoMARK insert the gold mode switch key and turn to OFF. Remove the key.

AutoMARK™

The AutoMARK marks a paper ballot with selections of voters who are visually impaired, have a disability that inhibits voting on a paper ballot, or who are more comfortable using a language different than the one on the ballot.

INTERACTING WITH THE AUTOMARK

There are three ways to interact with the AutoMARK.

- Directly on the Touch Screen
- The Keypad – includes Braille
- A personal A/B Device

Use the RIGHT arrow to progress to the next screen.

Use the LEFT arrow to go back a screen.

Use the DOWN arrow to move through your candidate and question selections. For the touch screen, if not all candidates are displayed, press the MORE bar to see the remaining candidates.

Use the UP arrow to move back up the candidate and question selections.

Use the SQUARE on the keypad to make your selection or press the selection on the screen.

USING THE AUTOMARK

1. When the touch screen monitor displays **Please insert your ballot**, feed the blank ballot into the ballot feed tray.

2. If applicable, select the appropriate language for your ballot to be displayed on the AutoMARK.

   Note: If English is the only language programmed for your election, the Language Selection screen will not display. The Voting Instructions screen appears after inserting your ballot.

3. Read or listen to the Instructions for voting on the Voting Instructions screen, then press **Next**.

4. The Contest screen displays the first office listed on the ballot and is read for your consideration. Select either the candidate name or the oval next to the name to indicate your selection. Your selection displays a filled-in oval next to the name of your choice. Press **Next** and repeat this process until you consider all contests and questions for the ballot.

5. The Summary screen appears when you have considered all contests and questions for your ballot. Review this screen to confirm your selections.

   Note: No selections have been marked on your ballot at this point.

6. To change any selection:
   i. Press the contest you wish to change on the Summary screen.
   ii. Touch your original selection to de-select your choice.
   iii. Touch your new response and press **Next** to return to the Summary screen.

7. Press **Next** when the selections are correct.

8. Press **Mark Ballot** on the Mark Ballot selection screen to print your selections onto the ballot.

9. When the screen displays **Remove Ballot,** remove your ballot from the ballot feed tray.

10. Insert your ballot into the privacy sleeve.

11. Deposit your marked ballot into the ballot box.

VERIFYING YOUR BALLOT

The AutoMARK allows the voter to reinsert the marked ballot into the ballot feed tray and to verify the marked selections. Note that no changes can be made from this verification step and you will only be able to view and hear the summary screen. If you want to make changes, please ask for a new ballot and begin the voting process over.

To verify your ballot:

1. Insert your marked ballot into the ballot feed tray.

   Note: A screen appears with instructions on how to verify the votes.

2. Press **Next** to make the Verification Summary screen appear.

3. Review the selections that are marked on your ballot.

4. Review your selections and when done, press **Exit**.

5. When the screen displays **Remove Ballot,** remove your ballot from the ballot feed tray.

6. Insert your ballot into the privacy sleeve.

7. Deposit your marked ballot into the ballot box.

MAKING THINGS EASIER TO SEE

AutoMARK options are available to make the text on the screen easier to see.

Zoom In/Out enlarges the text on the screen. Press ZOOM IN/OUT once to enlarge text; press again to return text to the default size.

High Contrast changes the default colors on the screen to black and white. When you select HIGH CONTRAST, the background becomes black and text becomes white. Press again to return to the default colors.

MAKING THINGS EASIER TO HEAR

The following AutoMARK options on the keypad make the audio easier to hear:

Press REPEAT on the keypad to repeat the text just read through the headphones.

Press the right side of the TEMPO button to speed up the audio or press the left side of the TEMPO button to slow down the audio.

Press the right side of the VOLUME button to increase the volume of the audio or press the left side of the VOLUME button to decrease the volume of the audio.

If you are not using the screen, you may use the SCREEN button to turn off the display. You will still hear the description of the ballot through the headphones. Touch the button once to turn off the display; touch it again to turn the display back on.