

# 2024 Election Administration and Voting Survey (EAVS)

# Guide to Using the Data Collection Templates

November 5, 2024



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# Introduction

The U.S. Election Assistance Commission (EAC) has provided two data collection templates to assist state and local election officials in submitting data for the 2024 Election Administration and Voting Survey (EAVS). These data templates have been redesigned and updated since the 2022 EAVS based on comments and feedback received from election officials. The templates will assist election officials in providing complete and accurate data to the EAC.

There are two data collection templates available:

- **Excel template**: This flat-file data collection template is a Microsoft Excel spreadsheet that allows for the copying and pasting of large amounts of data. It is also the template that states and territories will use to submit their preliminary and final data submissions to the EAVS project team. This format has a column for each EAVS item and a row for each EAVS jurisdiction in the state.
- **Online template**: This template allows users to enter data for a jurisdiction, item by item, into an online survey. It is intended to be used mainly by jurisdiction officials who provide EAVS data to the state office. Once completed, jurisdiction-level data will be automatically imported into the state's Excel template for the state's EAVS points of contact (POC) to review.

Both the Excel template and the online template include extensive built-in error-checking functionality that will examine the data for consistency and potential errors:

- **Sum validations**: Many items in the EAVS ask for a total number and a breakdown of that total into subcategories. In these cases, the validation will flag when the subcategories in a question do not sum to the expected total.
- Logic validations: An alert will appear if a value is incompatible with another response in the survey.
- **Policy Survey validations**: These validations will flag when an EAVS item is incompatible with a response reported by the state in the 2024 Policy Survey.
- **Missing data validations**: Except for most comment boxes and "Other" subcategories, all items in the EAVS require a response. An alert will appear if a response to a required item is not provided.
- **Color-coded error check (Excel template only)**: When the above issues are flagged by the errorchecking functionality in the Excel template, the relevant cells will be color coded to highlight items that need further review.

This user guide provides step-by-step instructions on how to use the Excel and online templates. Each section of this document guides users through the process of accessing the template, filling in data, running error checks, and submitting their data to the EAVS project team. This guide also covers how data transfers between the templates and how state EAVS POC(s) can customize the online template.

The EAVS project team recommends consulting the <u>2024 EAVS Questionnaire</u> as users work on their data submissions. The 2024 EAVS Questionnaire provides the full question language and instructions, which will assist users as they enter their data into the data collection templates.

A brief tutorial for novice and beginner users of Excel is in the <u>Appendix</u> of this user guide. If you have questions about using Excel in general or about any aspects of the templates, please <u>contact the EAVS project</u> <u>team</u> at Fors Marsh.



# The Excel Template

# Getting Started with the Excel Template

The 2024 EAVS Excel template works best in Microsoft Excel 2007, 2010, 2013, or Office 365. The Excel template is <u>not</u> compatible with Excel 2003 or earlier. If you cannot use a more recent version of Excel, please <u>contact the EAVS project team</u> to discuss your options.

If you need help identifying which version of Excel you have, refer to the <u>Appendix</u> at the end of this guide.

# Opening and Saving the Excel Template

State EAVS POCs can download their state's Excel template from the EAVS Portal (<u>https://eavsportal.com/</u>) by logging in using their portal credentials. If you are a designated state EAVS POC and are unable to access the EAVS Portal, then please <u>contact the EAVS project team</u>.

The Excel template file is located on the State Files page under the Downloads header. The file is named "2024\_EAVS\_Excel\_Template\_[your state's postal abbreviation].xlsm." Click on the file name to download it.

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	File Name		Įk.	Date & Time (EST)	



Microsoft Excel frequently opens files downloaded from the internet in "protected view." This view disables editing functions to protect your computer from malicious files and viruses. Because the EAVS Excel template comes from a trusted source, you can click "Enable Editing" to allow you to enter your data into the file.



Before proceeding any further, <u>you need to save the file locally to a location on your computer</u>. This step will ensure you can find the file again later and that you do not lose any data you have entered into the template. To save the file, first select "Save As" to save the file to a local folder on your computer. If you save the file somewhere other than a local folder—such as a network folder—you may have trouble saving changes to the file later. The file must be saved as an <u>Excel Macro-Enabled Workbook (\*.xlsm)</u> to preserve the error-checking functionality that has been built into the file. You may save the workbook under any name that you prefer, but make sure to use a name that you can remember easily.

The EAVS project team recommends downloading and saving a blank copy of the Excel template and always working in that copy, including when transferring any responses collected through the online template into the saved copy of the Excel template (see the section <u>Transferring Data Between Templates</u>).

Once you have used "Save As" to save the template to your desired location, you only need to select "Save" (and not "Save As") to save any changes made to the template. It is a good idea to save the file frequently as you work in the file to ensure you do not lose any data. Saving the template (either through "Save" or "Save As") will clear anything you have copied in your clipboard. For more detailed instructions on <u>saving files in</u> <u>Excel</u>, refer to the Appendix at the end of this user guide.

Additionally, when you open the template, Excel may show a pop-up notifying you that it cannot update some of the links in the workbook. If you see this prompt, you may select "Continue" to edit the workbook without updating the links. This will not affect the functionality of the file.

Microso	oft Excel X
	We can't update some of the links in your workbook right now. You can continue without updating their values, or edit the links you think are wrong. Continue

### Enabling Macros in Microsoft Excel 2007, 2010 and 2013 and Office 365

The EAVS Excel template contains macros that flag potential errors in a data submission so that the errors can be addressed before the data are sent to the EAVS project team for review (see the section Error



<u>Checking in the Excel Template</u> for more information). However, Microsoft disables macros from untrusted sources. Many users of the Excel template will see the following security risk warning in the ribbon when they first open the workbook.

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A1 • : × ✓ fx 2024	Election Administration and Vot	ing Survey (EAVS)						*
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<u>Users of the Excel template must mark the folder in which the template is saved as a trusted location on their</u> <u>computer to ensure the macros can run</u>. To do this, first open the workbook. Click the File tab, then select "Options" (if this selection is not available, then you may need to first select "More"). This will open the Excel Options menu. From this menu, select "Trust Center" and then click the Trust Center Settings button.

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Clicking this button will open the Trust Center menu. From this menu, select "Trusted Locations" and then "Add new location." This button will open a window from which the user can browse to select the file path where the EAVS Excel template is saved on their computer and click "OK" to mark it as a trusted location. Excel will then permit any file saved in that trusted location to run macros. From the Trusted Locations menu, checking the box next to the option "Subfolders of this location are also trusted" will allow macros to run in any file that is created as a subfolder within the originally designated folder. Once the folder has been designated as a trusted location, click "OK" on all the menus to close them. After this, close the Excel template file. When reopening the file, the template should not display the security risk alert and macros



should be enabled. If they are still not enabled, close the file and restart your computer to ensure your system updates the new trusted location.

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File Home Insert Page Page Calibri 1 Paste B I U - H - Trusted Locations Trusted Locations Trusted Locations Trusted Add-in Catalogs	Trusted Locations Warning: All these locations are treated as trusted sources is sure that the new location is secure. Path Description	3. Click the "Browse" button and navigate to a folder to mark as	Comments 🖄 Share
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DATA MISSINGNESS CODES; Use "Data not available" (-99) when the responding to a question are not true. Use "Does not apply" (-88) if no applicable Comparison of the second s	Sub Folders: Disallowed Allow 2. Click the "Add new location" button	Add new location Bemove Modify	r of Ofboars finder Xusuber on Does. Infer Timube Otata Not. Not Apply of Data and Available Not Apply of Data Not Not Apply of Survey Instructions for A2 Does Not Apply, Data Not Available, or Zero for A
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With the macros enabled, you are ready to begin entering your data for the 2024 EAVS. The red security risk warning will not be visible, and the macros can now run as intended.

If the above steps do not work, you may need to contact your information technology (IT) staff to seek assistance. If you use an earlier version of Microsoft Excel and need assistance with enabling the macros in the file, <u>contact the EAVS project team</u>.

# Navigating in the Excel Template

When you open the 2024 EAVS Excel template for the first time, you will see several worksheets within the file:

- **DataTab**: This worksheet is where you will enter your data. Each column in this tab represents an EAVS item, and each row represents a jurisdiction within your state or territory.
- GeneralSurveyInstructions: This worksheet contains instructions for each section of the survey. The instructions correspond to the instructions listed on pages 1–3, 16–17, 29, 36, 41, and 45 of the 2024 <u>EAVS Questionnaire</u>. Additional instructions that are specific to each question can be found in the DataTab worksheet.
- **ColorCodeValidationsGuide**: This worksheet lists the types of errors that the data validations look for and how to interpret the color codes that will appear once the file is error checked. See the section <u>Error Checking in the Excel Template</u> for more details.

Additional hidden tabs are present in the file to assist with its functionality. The error-checking functionality will also generate an additional tab with an error report every time the "Error Check" button is clicked (see



the section <u>Error Checking in the Excel Template</u> for more details). To avoid interfering with the errorchecking functionality, <u>do not delete tabs from or add additional tabs to the Excel template</u>.

Because of the number of columns and rows in the template, you will need to scroll left or right and up or down to view all the items in the DataTab worksheet. It is recommended that you freeze the panes in this worksheet on Cell **D7** so that the jurisdiction identifiers and EAVS item numbers are always visible to you in the spreadsheet (see the section Freezing Panes in Excel in the Appendix for more instructions).

<u>Do not add or delete columns from the DataTab worksheet</u>, as this will interfere with the functionality of the error-checking macros. However, you may hide and unhide rows and columns in this worksheet without affecting the error-checking functionality (see the section <u>Hiding and Unhiding Columns in Microsoft Excel</u> for more details).

The DataTab worksheet contains the following features:

- Prefilled list of jurisdictions: The Excel template lists all the jurisdictions in your state or territory for which the EAC needs to collect data. Column A of the worksheet has the Federal Information Processing Standard (FIPS) code (or another numeric identifier) for each jurisdiction, Column B has each jurisdiction's name, and Column C has your state's postal code two-letter identifier. If you find a mistake in the jurisdiction list in your state's template, then <u>contact the EAVS project team</u> before you begin your data entry. To avoid interfering with the error-checking functionality, <u>do not manually change the jurisdiction names</u>, FIPS codes, or state identifier.
- Question instructions: Rows 1–5, which are shaded blue, provide the question instructions. Row 1 contains the question title, Row 2 contains the item description, Row 3 contains instructions on what type of answer is expected (e.g., number, text description, pull-down menu), Row 4 contains question instructions, and Row 5 contains instructions on using "Does not apply," "Data not available," zero, and other responses within the context of the question. To conserve space, the instructions in rows 2, 4, and 5 will appear as informational boxes when you hover your mouse over the cell. You will recognize cells with additional instructions by the red triangle in the upper-right corner of the cell.
- Variable names: Row 6 provides the variable name. This row is shaded gold.
- Total Check columns: Many questions in the survey ask respondents to break total numbers down into subcategories. These questions include Total Check columns to help ensure your subtotals are adding up correctly; these columns are shaded gray. For instance, Column AF is the Total Check column for Question A3, and when the "Error Check" button is used, a formula will sum up the numbers submitted in items A3b–A3i for each jurisdiction and place that total in Column AF. That number can be compared to A3a in Column T. <u>These Total Check columns are not part of the official EAVS data submission and will be deleted from the data when they are publicly released</u>. When copying and pasting data into the Excel template, take care to work around these Total Check columns by using the Paste Special feature (see the <u>How to Copy and Paste Data</u> section in the Appendix).
- **Comments**: Most questions will allow you to elaborate on your answer with a comment. For instance, Column N is the comments section for Question A1. Most comments are optional, but we encourage you to use the space to provide more information about and context for your data responses. The comment space for Question D8 is the only required comment in the EAVS.



• **"Error Check" button**: Located in Cell A2, this button will run a series of error checks to help ensure your data are complete and accurate. See the <u>Error Checking in the Excel Template</u> section of this user guide for more information.



# Entering Data in the Excel Template

The Excel template allows for flexibility in how you input your data. You may enter one item at a time, one row at a time, one column at a time, multiple rows or columns at a time, or just small portions of data at a time. Content that you paste into the worksheet will lose any of its prior formatting once the error check is run. This includes cell color, cell background, or bolded, underlined, or italicized font.

You can copy data from a variety of outside sources (e.g., other Excel files, Microsoft Word files, PDF documents, Microsoft PowerPoint files) and paste that data into the Excel template without the formatting from those outside sources interfering with the structure of the template. If your data have delimiters (e.g., commas, tabs), you can easily paste them into the Excel template.

When adding data for different survey sections to the Excel template, you might find it helpful to use the "Paste Special: Skip blanks" function to avoid overwriting data that have previously been entered. See the <u>How to Copy and Paste Data</u> section in the Appendix of this user guide for more information on using this Excel function.

Most questions in the EAVS require a numerical or text response. Questions D8, F2, F3a, F3b, F3d, F4a, F4b, F4d, F5a, F5b, F5d, F6a, F6b, F6d, F7a, F7d, F8a, F8b, F9–F10, F11b, and F12 use pull-down menus with prefilled options. You cannot type information into columns with pull-down menus, but you can copy and paste information into those columns. Row 3 of the Excel template has details on what type of response is expected for each EAVS item.



Please attempt to record data according to the categories as they are defined in the question. If your jurisdiction uses a different data classification scheme (e.g., your jurisdiction collects data in such a way that combines two or more categories listed in a question), then you can use the space provided for "Other" to provide numbers and details for these categories. If you report information in the "Other" field, then use the comment box to provide an explanation for the answer.

Items should not be left blank. Except for question comments and "Other" items, all items in the EAVS require a response. The item description and answer instructions (rows 2 and 3) are shaded dark blue for mandatory items. Please use the comment boxes as needed to provide additional information regarding how you answered the questions, including any explanations about the quality of the data you are providing.

# Error Checking in the Excel Template

The 2024 Excel template has a built-in error-checking function that allows you to check your entire worksheet for potential data errors. To run the error-checking procedure, click the "Error Check" button, located in Cell A2 of the data collection worksheet. Before beginning the error check, please save your data.



After clicking the button, the macros that have been built into the file will check the entire DataTab worksheet at once. Clicking the "Error Check" button will clear any formatting that has been applied to the cells of the DataTab worksheet (e.g., color-coding, highlighting, bolding, text color), will apply updated color-coding to the cells of the DataTab worksheet to help you identify errors, and will populate a tab in the workbook:

• **ErrorReport**: This worksheet contains a full error report with tables, organized by jurisdiction, that lists the FIPS code and jurisdiction name, the variable causing the error, a description of the error, and the cell that the error appears in. The ErrorReport worksheet will appear immediately after the DataTab worksheet. If a blank error report is generated, this indicates that none of the macros generated an error, and there are no data errors to review in the submission.



	A	В	С	D	E	F 4
1	Error Report:	TEST				
2						
3	FIPS Code	Jurisdiction Name	Variable	Error	Cell	
4	900010000	A COUNTY	Ala	The sum of active (A1b), inactive (A1c), and other (A1d) registered voters should be equal to the total number of registered voters (A1a).	H7	
5	900010000	A COUNTY	A3a	The sum of the numbers you report in A3b–i should equal the total number of registration transactions you report in A3a.	77	
6	900010000	A COUNTY	A3a	The sum of the numbers you report in A4a–n should equal the total number of registration transactions you reported in A3a.	77	
7	900010000	A COUNTY	A3b	The sum of the numbers you report in A5a-n should equal the sum of registration transactions you reported in A3b and A3c.	U7	
				The amountry you report in ASs. ASs. A7s. ASs. and A0s republicanual the total number of registration transactions		
8	900010000	A COUNTY	A4a	received by mail, fax, or email you reported in A4a. Please correct your responses or use the comments section to explain why these subitems do not add up.	AH7	
				The amounts you report in B2b-c should equal the total number of FCPAs received from UOCAVA voters you reported		
9	900010000	A COUNTY	B2a	in B2a. Please correct your responses or use the comments section to explain why these subitems don't add up.	GQ7	
	OataTab	eport GeneralSurveyInstructions	ColorCodeValidationsGuide	+ : .		• •

The error-checking macros will look for the following types of errors:

- **Sum validations**: These validations will flag when subcategories do not sum to the expected total.
  - Example: The total number of voters who cast a ballot that was counted in the 2024 election, as reported in F1a, should match the sum of the number of voters who used different modes of voting (items F1b to F1h).
  - Color code—Orange: When the sum of the subcategories for one item does not add up to the reported total, the cell corresponding to the total in the DataTab worksheet will be highlighted orange. Please note that although the orange highlighted cell will be the total, the cause of the non-matching sum may be in one of the subitems. Using the example above, if the sum of F1b to F1h does not add up to the number reported in F1a, then the cell for F1a will be highlighted orange in the DataTab worksheet, but the item(s) causing the error can be anywhere in F1a to F1h.
- **Logic validations**: These validations will flag a value if it is incompatible with another response in the survey.
  - Example: The number of mail ballots that entered the cure process, as reported in C7a, should not exceed the number of mail ballots returned by voters, as reported in C1b.
  - Color code—<u>Green</u>: When a reported value is not compatible with another response in the template, the cell will be highlighted green. In the example above, the cell for C7a would appear highlighted green in the DataTab worksheet. However, when looking for the source of the problem, the user should review the items mentioned in the error message to determine where the issue is located (e.g., C7a and C1b in the example above).
- **Policy Survey validations**: These validations will appear when an EAVS item data conflicts with the state's Policy Survey data submission.
  - Example: If a state allows for same-day voter registration (i.e., responded "Yes" to Q11 of the Policy Survey), then no jurisdiction from that state should respond "Does not apply" to the number of same-day registrations received in item A2a.
  - Color code—<u>Yellow</u>: When a reported EAVS value conflicts with the state's Policy Survey submission, the cell(s) will be highlighted yellow. In the example above, the cell corresponding to A2a would appear highlighted yellow in the DataTab worksheet if a response of "Does not apply" is entered. If the EAVS data are correct and the Policy Survey data are incorrect, then <u>contact the EAVS project team</u>.
- **Missing data validations**: Except for most comment boxes and "Other" subcategories, all items in the survey require a response. An alert will appear if a response to a required item is not provided.



- Example: If a state reports the total number of registered and eligible voters in A1a but leaves blank the subitems for active and inactive registered voters, then A1b and A1c will be flagged. Instead of leaving items blank when you do not have a response to provide, report "Does not apply" (if your state does not have an applicable law or policy), "Data not available" (if your state/jurisdiction does not track data for an item), or zero (if no instance of an item occurred).
- Color code—<u>Light blue</u>: When a required EAVS item is left blank, the cell(s) will be highlighted light blue. In the example above, the cells corresponding to A1b and A1c would appear highlighted light blue in the DataTab worksheet.

The error check in the Excel template may take several minutes to run to completion. The more data you have entered in the template, the longer the error check will take to complete. While the error-checking function is running, the Excel window may briefly show a message that it is not responding; this will likely resolve itself once the macros run to completion. Do not interrupt Excel or close the program while an error check is in progress. If the Excel template shows a runtime error when the error check concludes, then contact the EAVS project team for assistance.

Please carefully review every validation error you receive. When corrections are warranted, make them directly in the DataTab worksheet. If your data submission is correct but the template still shows an error, then use the comment box appended to each question to add an explanation. This will help the EAVS project team assess and report your data accurately. Any errors that were not corrected or explained in the comment boxes will be flagged for further review after the data submission deadline.

You may run the error check as many times as you wish within the Excel template. Each time the "Error Check" button is clicked, the contents of the ErrorReport tab will be deleted and regenerated.

The "Error Check" button will also automatically generate a State Total row in the DataTab worksheet; this will be placed directly below the last jurisdiction listed in the tab. This row will automatically calculate column totals for each numerical item in the spreadsheet, excluding text and missing codes. This row will be deleted and regenerated each time the "Error Check" button is clicked.

	А	В	С	Н		J
	FIPS Code	Jurisdiction Name	State	A1a	A1b	A1c
6						
7	9000100000	A COUNTY	TEST	510,831	487,587	23,244
8	9000300000	B COUNTY	TEST	425,693	406,323	19,370
9	9000500000	C COUNTY	TEST	182,621	178,890	3,731
10	State Totals			1,119,145	1,072,800	46,345

Note that the Excel template may auto-populate some items with a VALID SKIP code after performing the error check. This automatically generated data code indicates the items that are skipped based on responses to related survey items (e.g., if a jurisdiction official reports that zero ballots were transmitted to military and overseas voters in item B5a, then items B5b through B28c will be automatically populated with the VALID SKIP code). This code is built into the programming of the Excel template and should not be manually entered anywhere else.



# Submitting Data Using the Excel Template

Once you have completed your EAVS data entry, error checked your data, addressed as many errors as possible, and added the comments necessary to interpret the data, you may submit the completed Excel template for your state through the EAVS Portal so that the EAVS project team can review it. Make sure all your edits have been saved to the file on your local computer and that you submit the most up-to-date version of the file that you worked on.

Navigate to <u>https://eavsportal.com/Account/Login</u> and enter your portal credentials. Under the File Upload header on the State Files page, click on "Choose File."

A STOLEN STOLEN		2	024 Electic and Vo	on Administration ting Survey	ForsMarsh		
HOME	DOWNLOADS	LINKS	RESOURCES A	STATE FILES	Hello 📕 🔺		
	Test Files						
	File Pati		Choose File No file c	hosen			
	Dowi	nloads					

Navigate to the location where you saved the Excel template on your local computer, click on the file name, and select "Open."



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On the EAVS Portal web page, verify the correct file path is listed in the text box next to the "Choose File" button, and then click the red "Upload File" button. Once your file has been successfully uploaded, a "File upload successful" message will appear under the File Upload header, and the file will appear—with the date and time you submitted it—in the table under the Uploaded Files header.



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If the file upload fails, an error message will appear describing the problem that has occurred. Common reasons for failed uploads include:

- File was not selected: If you did not select a file using the "Choose File" button, then red text will appear that reads "Please select a file."
- File with the same name already exists: If you have already uploaded a file with the same file name, then red text will appear that reads "Failed to upload the file '[name]' because it already exists. Please rename the file and try again."
- File is too large: The "File Upload" function on the EAVS Portal can only accept files that are less than 40 megabytes (MB) in size. If your file is larger than 40 MB, then <u>contact the EAVS project team</u> to discuss other ways to send your file.
- **File type error**: The EAVS Portal can only accept the following file types: XLS, XLSX, XLSM, DOC, DOCX, PDF, TXT, CSV, and ZIP. If you need to send another type of file, then <u>contact the EAVS project team</u>.
- **Upload was interrupted**: This error can occur when your internet connection is disrupted or the web page was closed before the upload completed. If this occurs, wait a few minutes and attempt to upload the file again.



# Submitting Final, Certified State Data Using the Excel Template

After a state submits its draft EAVS data by February 3, 2025, the EAVS project team will review the submission and send a written memorandum to the state's EAVS POC(s) summarizing the items in the data that need further review before the state's submission can be certified as final.



# The Online Template

# Password for the Online Template

The online template allows users to enter EAVS data item by item. This template is intended for states that rely on jurisdiction officials to submit part or all of the state's EAVS data submission, or for territories that report their EAVS data in one jurisdiction and do not wish to enter data directly into the Excel template. The online template can be used at the discretion of the state's EAVS POC(s).

Each EAVS jurisdiction (typically a county or municipality, in most states) has been assigned a unique password. Should the state's EAVS POC(s) wish to use the online template to collect data from its jurisdictions, the state's EAVS POC(s) will be responsible for distributing the passwords to jurisdiction officials. A list of assigned passwords can be downloaded from the EAVS Portal. After logging into the EAVS Portal using the portal credentials for your state, click on the link for the file titled "2024\_Online\_Template\_Passwords\_[your state's postal abbreviation].docx" to download the password list. If you are a state EAVS POC and cannot locate the credentials to access the EAVS Portal, then please <u>contact the EAVS project team</u>.

# Getting Started With the Online Template

Jurisdiction officials who have been asked to complete the online template can find it in the Links section of the EAVS Portal (<u>https://eavsportal.com/Home/Links</u>) or at <u>https://www.survey.eavsportal.com</u>. To log in, users will need to enter the password for the jurisdiction for which they will be entering data. Those passwords have been provided to the EAVS POC(s) for each state. If you are a jurisdiction official who has been asked to complete the online template and you have not received your password or have misplaced it, then please contact your state's EAVS POC(s).

The online template is most compatible with Microsoft Edge, Mozilla Firefox, and Google Chrome. If you have difficulty accessing the survey, then check that your browser is up to date or try a different browser. <u>This</u> <u>survey is only compatible with desktop or laptop computers; not with mobile devices, cell phones, or tablets.</u>



### Navigating in the Online Template

Once you have logged in to the online template, you will see an initial page that outlines the instructions for completing this survey online and asks for the contact information (i.e., name, title, office/agency name, and email address) of the person responsible for completing the EAVS in your jurisdiction. This information will only need to be entered once; however, if you need to return to this page to review the instructions or to update the contact information, then select the Instructions and Contact Information option from the main menu of the survey.

On the main menu, you can choose which part of the survey to complete first. There are options in this menu to return to the Instructions and Contact Information section, to complete any of the six sections within the EAVS (Sections A–F), and to review responses and submit data. You do not have to complete the survey sections in order.



Select the section of the survey you would like to go to:	
OInstructions and Contact Information - Reviewed!	
Section A: Voter Registration	
Section B: Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA)	
Section C: Mail Voting	
Section D: In-Person Polling Operations	
Section E: Provisional Ballots	
Section F: Voter Participation and Election Technologies	
Review Responses and Submit Data	
<< Back to Previous Page Save and Continue >>	
OMB Control No. 3265-0006	Expiration Date 4/30/2027

Some jurisdictions will be asked to complete only certain sections of the survey. Not all six EAVS sections may appear in a jurisdiction's main menu. If you have questions about why you are only providing data on certain questions or sections, then contact your state's EAVS POC(s).

After selecting a section of the EAVS to complete, you will see the menu for that section. Each section menu contains instructions that are relevant to completing that section of the survey. From there you can select the questions in that section for which you would like to enter data. To navigate back to the survey's main menu, click the orange "Back to Main Menu" button that appears at the top of each page of the survey.

Back to Main Menu >>
Section F: Voter Participation and Election Technologies
The goal of Section F is to understand how the voters in your jurisdiction participated in the 2024 general election and what election technologies were used to mark and tabulate ballots.
Answer All Questions
Please provide an answer to all of the items in Section F.
If the question is not applicable to your state or jurisdiction, check "Does not apply" as your response.
• Example: If your state is NVRA-exempt and does not offer provisional ballots, then check "Does not apply" as the response to question F1e.
<ul> <li>If the question is applicable to your state but your jurisdiction does not have the data necessary to answer the question, check "Data not available" as your response.</li> </ul>
<ul> <li><u>Example</u>: If your state uses ballot marking devices but does not track data on the number of these machines that were deployed, then check "Data not available" as the response to F5c.</li> </ul>
Select the questions you would like to go to:
OF1-F2: Total participation in the 2024 general election
OF3-F8: Election equipment used
OF9-F10: Use of electronic and paper poll books
OF11: Voter registration systems
OF12: Location of vote taily
Save and Continue >>
DMB Control No. 3265-0006 Expiration Date 4/30/2022

When you are viewing a survey question, there will be four ways to navigate through the survey: Above the question, there is a button that will take you back to the current section's menu and another button that will return you to the main menu of the survey. Below the survey question on the page, there is a "Back to Previous Page" button that will return you to the previous screen and a blue "Save and Continue" button that



will save the data you have entered on the current page and bring you to the Section Menu to select the next item(s) you want to answer. This "Save and Continue" button will also run an error check on the data you have entered on the current page (see the section <u>Error Checking in the Online Template</u> for more detail). Please note that <u>the Back to Section Menu, Back to Main Menu, and Back to Previous Page buttons do not</u> <u>save any data</u>. If you wish to save your data before proceeding in the survey or if you wish to exit the survey, then please ensure you have clicked "Save and Continue" to protect against data loss. <u>Do not use your</u> <u>browser's "Back" button</u> to navigate through the survey, as that may cause errors or data loss.

Back to Section C Menu >> Back to Main Menu >>			
C7. Mail Ballot Curing			
For question C7a. report the total number of mail ballots that entered the cure process in your jurisdiction for the 2024 general elect not be counted because its envelope had an error or the voter's returned ballot was missing required information and the voter who correct the error. Common reasons why a mail ballot may go through the cure process include the voter's signature on the mail ballot match the signature on the record, the mail ballot envelope was missing a witness signature (if required in your state), or the voter w or a copy of their identification but did not do so.	on, mean cast the b ot envelop /as require	ing the mail ba ballot was invite e was missing ed to include a	allot could ed to or did not n affidavit
Then, in C7b report the number of ballots from C7a that were <u>successfully cured</u> , meaning that the voter supplied the missing inform ballot was ultimately counted for the 2024 election. Then, in C7c report the number of ballots from C7a that <u>entered the cure proces</u> <u>by the voter</u> and were ultimately rejected and not included in the vote totals for the 2024 general election. The numbers in C7b and in C7a.	nation or c <u>s but were</u> C7c shoul	corrected the e e not successfu d sum to what	rror and the <u>ully cured</u> is reported
If your state does not allow voters to cure errors or missing information on their mail ballots, check "Does not apply" in C7a–C7c. If y curing but does not track data on the number of mail ballots that underwent this process, check "Data not available" in C7a–C7c.	rour state	allows for mail	l ballot
	(?)	Data not available <sup>(?)</sup>	Does not apply <sup>(?)</sup>
C7a. TOTAL number of mail ballots that entered the cure process:			
Total number of mail ballots that were initially rejected for errors or missing information and the voter was invited to correct the error or supply the required information.			
C7b. Total number of mail ballots that were successfully cured			
C7c. Total number of mail ballots that entered the curing process but were not successfully cured by the voter			
C7 Comments:			
Please specify by typing here			
< Back to Previous Page Save and Continue >>		Expiration	0 Date 4/30/202

When you finish a section of the survey, you will be directed back to the section menu; then you will need to click the orange "Back to Main Menu" button to return to the survey's main menu. From the survey's main menu, you can select another section to complete. The survey's main menu and the section menus will note the percentage of the required questions for each section or subsection that has been completed.



Expiration Date 4/30/2027

Select the section of the survey you would like to go to:

OInstructions and Contact Information - Reviewed!

Section A: Voter Registration - 40% Reviewed!

Section B: Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA)

OSection C: Mail Voting - 100% Reviewed!

O Section D: In-Person Polling Operations - 100% Reviewed!

O Section E: Provisional Ballots

OSection F: Voter Participation and Election Technologies

OReview Responses and Submit Data

<< Back to Previous Page Save and Continue >>

OMB Control No. 3265-0006

Back to Main Menu >>

#### Section E: Provisional Ballots

The goal of Section E is to understand provisional voting in your jurisdiction. This section of the EAVS asks for three types of data:

- 1. How many individuals cast a provisional ballot in the 2024 general election?
- 2. What were the reasons the provisional ballots were cast?
- 3. What were the reasons provisional ballots were rejected?

Two definitions will be helpful as you answer the questions in Section E:

Provisional voter: An individual who declares they are a registered voter in the jurisdiction where they desire to vote and is eligible to vote in an election for federal office, but (1) the voter's name does not appear on the official list of eligible voters for the polling place, or (2) an election official asserts that the individual is not eligible to vote.

Provisional ballot: A ballot used to record a vote when there is some question regarding the eligibility of the voter. Once voted, provisional ballots are kept separate from other ballots and are not tabulated until the eligibility of the voter is confirmed.

#### Answer All Questions

#### Please provide an answer to all of the items in Section E.

- · If the question is not applicable to your state/jurisdiction, check "Does not apply" as your response.
- Example: If your state is NVRA-exempt and does not offer provisional ballots, then check "Does not apply" as the response to all questions in Section E.
- If the question is applicable to your state but your jurisdiction does not have the data necessary to answer the question, check "Data not available" as your response.
  - Example: If your state or jurisdiction does not track data on the reasons why provisional ballots were rejected, then check "Data not available" as the response to E3b-E3m.

#### Select the questions you would like to go to:

E1-E2: Provisional ballots cast - Reviewed! E3: Provisional ballots rejected		
	Save and Continue >>	
DMB Control No. 3265-0006		Expiration Date 4/30/2027

You do not have to fill out the entire survey in one sitting. To exit the survey without data loss, click "Save and Continue" at the bottom of the page and then close the survey tab. When you reenter the survey, you will be taken to the survey's main menu.



### Entering Data in the Online Template

Most questions in the EAVS require a numerical or text response. These questions can be completed by typing the answer into the text box. Many questions also have the option to check a box for "Data not available" and, when appropriate, to check a box for "Does not apply." In addition, each question in the EAVS includes a comment box where you may add context or additional information about your answer.

A1. Total Number Registered and Eligible Persons, Active and Inactive			
For question A1, report the total number of people (not votes or ballots) who were registered and eligible to vote in the November 2024 general elect between active and inactive voters, report the number of active voters in A1b and inactive voters in A1c. If your state does not make this differentiativ voters again in A1b and check "Does not apply" as the response to A1c and A1d. If your state or jurisdiction has other categories of registered and eligible to voters, list them in A1d; otherwise, check "Does not apply" as the response to A1d. The sum of A1b, A1c, and A1d should equal the total nu A1a.	<u>tion</u> . If your juri on, report the to ligible voters a mber of registe	sdiction differe otal number of side from active red voters rep	ntiates registered e and orted in
		Data not available <sup>(?)</sup>	Does not apply <sup>(?)</sup>
A1a. <u>TOTAL number of registered and eligible voters</u> : Do not include any individuals who registered to vote after the 2024 deadline for registration, individuals whose registration applications were not processed in time for them to vote in the 2024 general election, or individuals who registered under a pre-registration program but were not yet eligible to vote in the 2024 general election.			
A1b. <u>TOTAL number of active voters</u> : <sup>(?)</sup> Fully eligible voters who had no additional processing requirements to fulfill before voting.			
A1c. <u>TOTAL number of inactive voters</u> <sup>(?)</sup> Voters who were eligible to vote but required address verification under the provisions of the NVRA.			
A1d. <u>TOTAL number of other registered and eligible voters (please describe)</u> : If your state or jurisdiction had another type of registered and eligible voter aside from active and inactive (such as provisionally registered voters, voters whose registration applications are still being processed, or voters whose registration status is pending), report them here.			
A1 Comments:			
Please specify by typing here			

Some EAVS questions are multiple choice and allow you to select your response using a radio button or a drop-down menu.

D8. Ease of Recruiting Poll Workers
How difficult or easy was it for your jurisdiction to obtain a sufficient number of poll workers for the November 2024 general election? Please select one option. In addition, use the D8 Comments box to provide further information about your experience recruiting poll workers for this election.
OVery difficult
Somewhat difficult
Neither difficult nor easy
Somewhat easy
OVery easy
ONot enough information to answer



#### F9-F10. Use of Electronic and Paper Poll Books

For questions F9 and F10, indicate whether your jurisdiction us November 2024 general election for the listed activities. Comp	sed e-poll books/electronic lists of voters or tr letely vote-by-mail jurisdictions that have no i	aditional printed, paper poll in-person voting options sho	books in polling places in the uld answer "No" to all items.
For items a-e below, indicate whether your jurisdiction used e- 2024 general election. Item f only applies to e-poll books. Item items a-f, otherwise, respond "No."	poll books or traditional paper poll books at p g may be used if e-poll books or paper poll b	oolling places for the followin books are used for another p	g functions in the November urpose that is not listed in
Use of Poll Books	F9. Electronic poll books (e-poll books)(?)	F10. Paper poll books(?)	
a. Sign voters in	Select an answer V	Select an answer 🗸	
b. Update voter history	Select an answer	Select an answer 🗙	
c. Look up polling places	Yes	Select an answer 🗸	
d. Assist with same-day registration	No	Select an answer 🗸	
e. Check voter's mail ballot status	Select an answer 🗸	Select an answer 🗸	
f. Encode BMD cards during early voting	Select an answer 🗸		
g. Other: <sup>(?)</sup> Please specify by typing here	Select an answer V	Select an answer 🗸	

Please attempt to record data according to the categories as they are defined in the question. If your jurisdiction uses a different data classification scheme (e.g., your jurisdiction collects data in such a way that combines two or more categories listed in a question), then you can use the text box provided for "Other" to provide numbers and details about these categories. If you report information in the "Other" field, then please use the text box to provide an explanation for the category.

E1. Total Provisional Ballots Submitted and Their Adjudication			
For question E1a, report the total number of voters who submitted provisional ballots in the November 2024 general election. Ne the total number of voters who submitted provisional ballots (as reported in E1a) into the listed categories.	lext, for qu	estions E1b-E	1e, divide
	(?)	Data not available <sup>(?)</sup>	Does not apply <sup>(?)</sup>
E1a. TOTAL number of voters who submitted provisional ballots: The number of voters who submitted provisional ballots, regardless of whether or not the provisional ballot was ultimately counted in part or full.			
E1b. Provisional ballots that were counted in full			
E1c. Provisional ballots that were counted in part (e.g., only the items on the ballot for which the voter would have been eligible had they voted in the correct precinct)			
E1d. Provisional ballots that were rejected			
E1e. Other: <sup>(?)</sup> Please specify by typing here			

Items should not be left blank. Except for most question comments and "Other" items, all items in the EAVS require a response. If you have left a required item blank in the survey, then the system will prompt you to enter a response before you can advance to the next screen in the survey.



#### **B1. Total Registered and Eligible UOCAVA Voters**

For question B1a, report the total number of registered and eligible voters in your jurisdiction who were covered by UOCAVA in the November 2024 general election.

For questions B1b and B1c, separate the number of registered and eligible voters that were reported in B1a into the categories of Uniformed Services voters or non-military/civilian overseas voters. These amounts should sum to the total provided in B1a. If you are unable to distinguish between different UOCAVA voter types, complete B1a and check "Data not available" for B1b–B1c.

Provide any comments about the nuances of how your jurisdiction categorizes registered UOCAVA voters in the B1 Comments box. Please provide a response to B1c.

	(?)	Data not available <sup>(?)</sup>
B1a. TOTAL registered and eligible UOCAVA voters: Report the total number of registered and eligible voters covered under UOCAVA for the November 2024 general election. Include active and inactive voters and any persons who might have registered as UOCAVA before or on Election Day. <sup>(?)</sup> If the total number of registered and eligible voters who were covered by UOCAVA in the November 2024 general election in your jurisdiction is zero, report "0" for B1a.	583	
B1b. Total registered and eligible Uniformed Services voters (members of the Uniformed Services and their eligible dependents)–domestic or foreign	269	
B1c. Total registered and eligible non-military/civilian overseas voters		

Use the comment boxes as needed to provide additional information regarding how you answer the questions, including any explanations about the quality of the data you are providing. If an EAVS item does not apply to your state or jurisdiction because you do not have a law that allows for it, then you may select "Does not apply" as your response. If your state or jurisdiction does not track data for an item, then you may select "Data not available" as your response. There are instructions throughout the survey that provide helpful advice and examples for when to use the "Does not apply" and "Data not available" responses. These instructions can be accessed by hovering your mouse over any blue question mark you see in the survey.

	C4. Election Day <sup>(?)</sup>	C4. Data not available <sup>(?)</sup>	C4. Does not apply <sup>(?)</sup>	C5. Early voting <sup>(?)</sup>	C5. Data not available <sup>(?)</sup>	C5. Does not apply <sup>(?)</sup>
<u>a. TOTAL drop boxes used during the</u> <u>specified voting period</u> .		any drop boxes that	were			
b. Drop boxes located at election offices.	(Noven	iber 5, 2024).				
c. Drop boxes located at non-election office sites.						

Additionally, yellow boxes like the instructions mentioned above will appear when hovering your mouse over data entry fields. These boxes will show the data that should be entered in that cell and are helpful when completing grids with multiple rows and columns to confirm the data that should be entered in a particular cell.



Registration Source	A4. Total registration transactions: Should equal 5,000 (A3a)	A4. Data not available <sup>(?)</sup>	A5. New valid registrations: Should equal 1,000 (A3b + A3c)	A5. Data not available <sup>(?)</sup>	A6. Duplicates of existing registrations: Should equal 1,000 (A3d)
a. Individual voters who submitted transactions by mail, fax, or $\mbox{email}^{(2)}$	500		100		
<ul> <li>b. Individual voters who registered in person at the election/registrar's office</li> </ul>	500		100		
c. Individual voters who submitted transactions via a public- facing online registration system maintained by the state or jurisdiction election office (excluding online registration systems specific to one of the government agencies listed below)	500		100		
<ul> <li>Registration transactions received through an automatic registration program</li> </ul>	500		100		
<ul> <li>e. Motor vehicle offices or other offices that issue driver's licenses (excluding automatic registration programs)</li> </ul>	500		100		
<ul> <li>f. Public assistance offices mandated as registration sites under NVRA (excluding automatic registration programs)</li> </ul>	500		100		
<ul> <li>g. State-funded agencies primarily serving persons with disabilities (excluding automatic registration programs)</li> </ul>	500		100		
Registration Source	A4. Total registration transactions: Should equal 5,000 (A3a)	A4. Data not available <sup>(?)</sup>	A5. New valid registrations: Should equal 1,000 (A3b + A3c)	A5. Data not available <sup>(?)</sup>	A6. Duplicates of existing registrations: Should equal 1,000 (A3d)
h. Armed forces recruitment offices	500		100		
<ul> <li>Other agencies designated by the state not mandated by NVRA (excluding automatic registration programs)</li> </ul>	300		h. Armed forces recruitment offices - A5. New valid registrations: Should equal		
j. Registration drives from advocacy groups or political parties	200		1,000 (A3b + A3c)		
k. Polling places and voting sites	200		40		

As you navigate through the survey questions, be aware that hitting the Enter key on your keyboard to navigate to another active field in the survey acts as hitting the "Save and Continue" button. Instead of using the Enter key, use the Tab key to navigate between active fields in the survey.

# Error Checking in the Online Template

An error-checking test has been incorporated into the functionality of the survey. As you navigate through the questions, the system will automatically check the data that you have entered on each page for potential errors. Data validations will run on each page once you click "Save and Continue." The error checks will first look for required items in the survey that have been left blank; you will not be able to continue to the next page in the survey without providing a response to all required items. After all required items have a response, the error checks will flag the following types of errors:

- **Sum validations**: These validations will flag an item when subcategories do not sum to the expected total.
  - Example: The total number of voters who cast a ballot that was counted in the 2024 election, as reported in F1a, should match the sum of the number of voters who used different modes of voting (items F1b to F1h).
- Logic validations: These validations will flag an item if a value is incompatible with a response that was previously entered in the survey.



- Example: The number of mail ballots that entered the cure process, as reported in C7a, should not exceed the number of mail ballots returned by voters, as reported in C1b.
- **Policy Survey validations**: These validations will flag an item when an EAVS item conflicts with the state's Policy Survey data submission.
  - Example: If a state allows for same-day voter registration (i.e., responded "Yes" to Q11 of the Policy Survey), then no jurisdiction from that state should respond "Does not apply" to the number of same-day registrations received in item A2a.
- **Missing item description**: These validations will flag when data have been entered into an "Other" subcategory but no corresponding text description has been entered.
  - Example: If a jurisdiction reports that 92 voters cast ballots that were counted by other voting methods in F1h, then the jurisdiction is required to include a text description of the type of voting that these 92 voters used to cast their ballots.

Error messages that have been triggered by the data validations will appear in red text on the page above the question grid that contains an error.



Please carefully review every validation message you receive. When corrections are warranted, make them directly to the appropriate item in the online template. If your data submission is correct but the template still shows an error, then use the comment box appended to each question to provide an explanation. This additional context will help the EAC assess and report your data accurately. Any errors that are not corrected or explained in a comment box will be flagged for further review after the data submission deadline.

Most of the validation messages that appear will not prevent you from navigating to another part of the survey by clicking "Save and Continue" again. However, if you continue through the survey without addressing the validation errors, then the validation message will disappear and will not show again until you return to the question and click "Save and Continue" at the bottom of the page. The "View/Print Responses" option available on the survey submission page will also contain a list of all error messages that are present in a survey submission.



# Submitting Data in the Online Template

Once all your data have been entered, you have addressed as many errors as possible, and you are ready to submit, navigate to the survey's main menu and select "Review Responses and Submit Data."

Select the section of the survey you would like to go to:	
OInstructions and Contact Information - Reviewed!	
Section A: Voter Registration - 100% Reviewed!	
Section B: Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA) - 100% Reviewed!	
Section C: Mail Voting - 100% Reviewed!	
Section D: In-Person Polling Operations - 100% Reviewed!	
Section E: Provisional Ballots - 100% Reviewed!	
Section F: Voter Participation and Election Technologies - 100% Reviewed!	
Review Responses and Submit Data	
<< Back to Previous Page Save and Continue >>	
OMB Control No. 3265-0006	Expiration Date 4/30/2027

Submitting your data through this page will lock your survey, and you will not be able to reopen it or edit your answers. Do not submit your data until you are sure that all recorded answers are final. You may click on the orange "View/Print Responses" button at the top of the page to view, download, or print a report of all the responses you have entered in the survey. If you wish to update any of your responses before submission, use the "Back to Main Menu" navigation button to return to the survey's main menu and navigate to the question(s) you wish to update.

When you are ready to submit your data, first check the box next to the statement, "I agree to lock my data submission," and then click the "Submit Data" button.

View/Print Responses
Back to Main Menu >>
To view or print a copy of the survey responses you have provided, click the "View/Print Responses" button above. This will open a separate tab or window within your browser that will have buttons you can use to download an HTM file of your responses or print the page.
To edit your responses, click the "Back to Main Menu" button and navigate to the appropriate section of the survey.
Please ensure that all submitted answers are final. You will not be able to reopen the survey after clicking Submit until your state's EAVS point of contact notifies you that the survey is open again for data corrections. Your answers will be saved automatically if you exit the survey without submitting.
I agree to lock my data submission
<< Back to Previous Page Submit Data
OMB Control No. 3265-0006 Expiration Date 4/30/2025

Once a jurisdiction has submitted its data through the online template, the data will be made available to the state's EAVS POC(s) via a file that can be downloaded from the EAVS Portal (see the section <u>Transferring Data</u> <u>Between Templates</u> for more details).



If your data submission has been locked in the online template and you need to access the survey again, then contact your state's EAVS POC(s) and the <u>EAVS project team</u>.

# Submitting Final, Certified Data Using the Online Template

After a state submits its draft EAVS data by February 3, 2025, the EAVS project team will review the submission and send a written memorandum to the state POC(s) summarizing the items in the data that need further review before the state's submission can be certified as final. When the memo is sent, the EAVS project team will also reopen the online template for all of the state's jurisdictions. State EAVS POCs should notify jurisdiction officials that the online template is open again and that the jurisdiction's original password can be used to re-access the survey. All the data originally submitted by the jurisdiction officials will be available in the online template, and jurisdiction officials can make any necessary edits to their data. Once the data are ready to be certified as final, the jurisdiction officials may use the process outlined above to resubmit their data (see the section <u>Submitting Data in the Online Template</u>).



# **Transferring Data Between Templates**

States may wish to use a combination of templates to compile their EAVS data. Scripts running in the background of the EAVS Portal (https://eavsportal.com/) will format the data submitted via the online template and transfer that data into each state's Excel template for the state to review. Data submitted via the online template will be posted to the EAVS Portal every 2 hours between 6 a.m. and 6 p.m. Eastern Time (seven times daily). The name of this file will be "2024\_EAVS\_Online\_Data\_YYYYMMDD\_HHmm\_[postal code].xlsm." "YYYYMMDD" represents the date and "HHmm" represents the time stamp (using the 24-hour clock in Eastern Time) of when the data file was generated. For instance, a file generated on January 24, 2025, at 2:05 p.m. Eastern Time would be named "2024\_EAVS\_Online\_Data\_20250124\_1405\_[postal code].xlsm."

The remainder of this section discusses how the data transfer process occurs.

# Coordinating Jurisdiction Data Collection Using the Online Template

The online template can help the state's EAVS POC(s) coordinate data collection with local jurisdictions. Each jurisdiction has a unique password credential to access the survey; these passwords have been provided to each state's EAVS POC(s) through the EAVS Portal (see the section <u>Password for the Online Template</u> in this guide for more detail). The online survey instrument includes EAVS questions from each section of the survey.

State EAVS POCs who would like to use the online template to collect data from their jurisdictions for only certain survey sections or who would like to pre-populate portions of the online template with data from a centralized state database should contact the EAVS project team to get this set up. These requests generally take 5–7 business days to fulfill. The prefill requests should be completed <u>before</u> jurisdiction officials can access the online template to begin filling in their data.

Data collected from jurisdictions using the online template will be exported to the Excel template through the following process:



- 1. The state's EAVS POC distributes the passwords and any special instructions to local election jurisdiction officials.
- 2. Jurisdiction users access the survey and enter their password to log in.
- 3. The online template guides users through the survey item by item, with a real-time error check that flags potential issues as data are entered.
- 4. Data are automatically saved so users can return and continue later.
- 5. When the survey is complete, data are submitted directly to the state's EAVS POC for review.





- 6. Data reported through the online template are compiled and formatted into the state's Excel template. This file is updated seven times per day with the most recent data from the online template.
- 7. The state's EAVS POC copies the data from the online data <u>file into the Excel template that is saved on their local</u> <u>computer and uses the Excel template to prepare and</u> <u>submit the official state EAVS data</u>. Color-coded error-check and validation functions in the Excel template allow the state's EAVS POC to review and confirm data before submitting.

# Using the Online Template for Jurisdiction Review of State Data

The online template can also be used to allow jurisdiction officials to review and update data reported centrally by the state. State EAVS POCs who wish to prefill data into the online template should <u>contact the EAVS project team</u>. The prefill requests will take 5–7 business days to fulfill.







- 8. Any changes made by the jurisdiction officials to the original data will be reflected in the state's Excel template on the EAVS Portal.
- 9. Changes are not tracked. If a state's EAVS POC wishes to track information regarding which EAVS items were updated and why, then they should instruct jurisdiction officials to provide this information in the comments or in other documentation.
- 10. The state's EAVS POC copies the data from the online template into the Excel template that is saved on their local computer and uses the Excel template to prepare and submit the official state EAVS data. Color-coded error-check and validation functions in the Excel template allow the state's EAVS POC to review and confirm data before submitting.

# Using the EAVS Portal to Track Jurisdiction Progress in the Online Template

State EAVS POCs whose jurisdictions use the online template can use the EAVS Portal to help track their jurisdictions' progress. This will require logging into the EAVS Portal at <u>https://eavsportal.com/Account</u> /<u>Login</u>. If you have misplaced your state's portal credentials for the EAVS Portal, <u>contact the EAVS project</u> team.

The Online Survey Tracking Status table lists each jurisdiction within the state, the jurisdiction's status (i.e., Not Started, In Progress, Complete, or Data Edits), the percentage of the EAVS questions the jurisdiction has completed in the online template, and a time stamp of when the jurisdiction last accessed the online template. Because the completion percentage includes any items that have been prefilled based on the state's 2024 Policy Survey responses or at the state's request, some jurisdictions' completion percentages may be greater than 0% even if a jurisdiction has not yet accessed the online survey. Because the denominator of the completion percentage calculation includes non-required survey items (such as optional comment spaces and optional "Other" items within certain questions), a jurisdiction's EAVS submission may be functionally complete even if its completion percentage is not 100%.

State EAVS POCs can sort this table by any of the four column headers. This table will refresh every 2 hours between the hours of 6:00 a.m. and 6:00 p.m. Eastern Time; a time stamp below the table title lists the date and time of the last refresh. All time stamps in the tables are displayed in Eastern Time. The table lists 15 jurisdictions at a time. Additional jurisdictions can be viewed by clicking the "Next" button below the table.



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ALBEMARLE COUNTY	Not Started	0%	-	-					
ALEXANDRIA CITY	Not Started	0%	-						
ALLEGHANY COUNTY	Data Edits	77%	2	024-1	0-02 (	09:14	:29		
AMELIA COUNTY	In Progress	69%	2	024-1	0-04	13:26	:44		
AMHERST COUNTY	Completed	100%	2	024-1	0-03	14:13	26		
APPOMATTOX COUNTY	Not Started	0%	-						
ARLINGTON COUNTY	In Progress	11%	2	2024-10-05 10:38:25					
AUGUSTA COUNTY	Not Started	0%	-	-					
BATH COUNTY	Not Started	0%	-	-					
BEDFORD COUNTY	Not Started	0%	-						
BLAND COUNTY	Not Started	0%	-	-					
BOTETOURT COUNTY	Not Started	0%	-	-					
BRISTOL CITY	Not Started	0%	-						
BRUNSWICK COUNTY	Not Started	0%	-	-					



# Requesting Further Assistance With the Data Collection Templates

If you have questions about submitting your data that have not been answered in this guide or if you experience technical issues with the data collection templates, then please reach out to the EAVS project team by email (<u>eavs@forsmarsh.com</u>) or by telephone. The telephone number for the EAVS project team will be available to state EAVS POCs on the State Files page on the EAVS Portal, which can be accessed by navigating to <u>https://eavsportal.com/Account/Login</u> and using your login credentials.

When sending an email, if possible, include screenshots of any errors you encounter; this will help the EAVS project team provide you with customized support.



# Appendix

This appendix is intended to provide users with the technical knowledge necessary to use the Microsoft Excel template. The guide covers the following topics:

- How to identify which version of Excel you have
- How to save Excel files
- Components of an Excel workbook
- Freezing panes in Excel
- Hiding and unhiding columns in Excel
- Using Notes in Excel
- How to copy and paste data in Excel

This guide is most applicable to users running Microsoft Excel 2010 and 2013 and Office 365. If you use an earlier version of this software (such as Excel 97–2003 or 2007) and need technical assistance, then please contact the EAVS project team.

# Which Version of Microsoft Excel Do I Have?

You may find it helpful to know which version of Excel you are working in because some features of the program have changed over the years. The process for saving a file, for example, differs slightly between Excel 97–2003; Excel 2007, 2010, or 2013; and Office 365.

To determine which version of Excel you have, first open either the 2024 EAVS Excel template or a blank Excel workbook.

If you are using Office 365, then the Excel menu will look similar to this:

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If you are using Excel 2007, 2010, or 2013, then the Excel menu will look similar to this:

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To distinguish between Excel 2007 and Excel 2010, click on the "?" icon (blue in 2007 and 2010) in the upperright corner.

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A box will pop up indicating the version of Excel you are working in.

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# Saving a File in Excel

Once you begin working in the Excel template, you will need to save your work. The first time you save, you will need to save the file to your computer by using "Save As" to specify a file name and file path; however, any time after that, you can save the file by simply selecting "Save."

### Saving in Excel 2010 or 2013

To save a workbook in Excel 2010 or 2013, first open the File menu and then select "Save As." From there, specify the file path (i.e., the location on your computer) where you would like to save the workbook. You will also need to create a name for the file. You must also ensure the file is saved as an <u>Excel Macro-Enabled</u> <u>Workbook (.xlsm)</u> to allow the error-checking macros to run in the file; this should be the default option in the "Save as type" drop-down menu.







Click "Save" or hit "Enter" on your keyboard when done.

### Saving in Office 365

In Office 365, begin by clicking the File menu in the top-left corner.



Select "Save As" in the menu on the left-hand side. You will then need to specify a file path (i.e., the location on your computer) where you would like to save the workbook. You also need to create a name for the file. You must save the file as an <u>Excel Macro-Enabled Workbook (\*.xlsm)</u> to retain the error-checking functionality that has been built into the file. Click "Save" or hit "Enter" on your keyboard when done.

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# Components of an Excel Workbook

Before you begin working in the Excel template, it is useful to understand the basic layout of Microsoft Excel and some terms that are common to the program.

- Workbook: An Excel workbook is the entire file that you work with; in this case, the Excel template, including all worksheets.
- Worksheet: Worksheets are the specific tabbed sections within the workbook. A blank workbook contains up to three worksheets by default (Sheet1, Sheet2, Sheet3), depending on which version of Excel you are using.



Excel's menus and toolbars, which cover approximately the top quarter of the screen, differ slightly between Excel 2010 and 2013 and Office 365. These features can be used to format and adjust the appearance of the worksheets, to sort data, to insert formulas, and to perform other advanced operations. You will not need to know how to use these features in order to use the EAVS template. Aside from knowing how to save the file (covered in the <u>Saving a File in Excel</u> section of this appendix) and perform basic commands, such as "copy" and "paste" (which will be covered in the <u>How to Copy and Paste Data</u> section of this appendix), you will not need to interact much with the menu features.

However, you will be required to enter data (numbers, and in some cases, text) into the worksheets. To perform these tasks, you will use these features in Excel:

- Active cell: This is the "current cell" or the cell that is in focus. A thick black outline surrounds this cell. Whenever you type something on the keyboard, it will appear in the active cell. You can change which cell is active by clicking with the mouse or using the arrow keys on the keyboard.
- Formula bar: You can also enter data into the active cell by typing your data in the formula bar.
- **Columns and rows**: Columns run vertically and are designated by letters; rows run horizontally and are designated by numbers. The intersection of column letters and row numbers creates a cell reference (e.g., A1).
- Name box: The name box displays the cell reference (e.g., A1) of the active cell.
- Sheet tabs: The sheet tabs are in the bottom-left corner and allow the user to navigate between different worksheets. In a workbook that contains a large number of worksheets, not all sheet tabs are displayed at once. You can see the whole range of sheet tabs by clicking on the tab scrolling arrows to the left of the sheet tabs.
- Scroll bars: The worksheets in the 2024 EAVS Excel template are very large. You will need to scroll horizontally to view all the columns you will need to enter data in. Depending on the number of jurisdictions in your template, you may also need to scroll vertically. You can scroll up and down by clicking and dragging the vertical scroll bar on the far-right corner of your screen. Likewise, click and drag the horizontal scroll bar—located in the bottom-right corner—to scroll left and right. You can also make different cells active by using the arrow keys. The worksheet will scroll appropriately to always keep the current active cell in view.
- **Save Icon**: This button can be clicked to save any data entered in the workbook. This can also be accomplished by holding down the Ctrl + S keys or ℜ (Command) + S keys on your keyboard.

The figure below highlights where these Excel features can be found.





# **Freezing Panes in Excel**

The data header rows (rows 1–6) in the DataTab worksheet contain important information to understanding where to put data within the worksheet. You may wish to keep these header rows visible as you scroll through the worksheet. To do this, select the View menu within Excel, and then select the option to "Freeze Panes." When you select "Freeze Panes," the rows above and the columns to the left of the cell that are currently selected in the worksheet will be "frozen." We recommend you select cell D7 to ensure you "freeze" the rows containing item information and the columns containing jurisdiction name.



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# Hiding and Unhiding Columns in Microsoft Excel

As detailed in the section <u>Navigating in the Excel Template</u>, users of the Excel template <u>should not</u> add or delete columns in the template. Doing so will interfere with the functioning of the error-checking macros and will cause the macros to highlight errors that do not exist in the data submission.

Users may hide and unhide columns in the DataTab worksheet to assist with their data entry and review. To hide a column, click on the column letter of the column you wish to hide; this will highlight the entire column. To highlight multiple adjacent columns, click and hold the left mouse button and drag the mouse left or right to highlight the columns. Once the desired columns are highlighted, right-click the selected columns and choose the option "Hide" from the menu that appears.



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To unhide columns that have been hidden, select the columns that are adjacent to the hidden columns, rightclick the selected columns, then select "Unhide" from the menu that appears.

If a column is hidden from view, Microsoft will still copy data from the hidden column or paste data into the hidden column if the hidden column is within the selection.

# Using Notes in Microsoft Excel

As detailed in the section <u>Navigating in the Excel Template</u>, rows 2, 4, and 5 of the DataTab worksheet in the Excel template have additional survey instructions embedded as notes. These notes can be read by placing your mouse within a cell that has a red triangle in the upper-right corner of the cell.

To show a note so your mouse does not need to be in the cell for the instructions to be visible, right-click on the cell and select the option "Show/Hide Note" from the pop-up menu. The note can also be resized or moved within the worksheet so it does not obstruct the data cells.



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# How to Copy and Paste Data

You may find it helpful to copy the contents from one cell to another cell in Excel. You might even wish to copy cell contents from another Excel workbook, or information from another file format, into the Excel template.



**Copy**: To do this, select the cell or the specific contents of a cell(s) that you wish to copy. Then hold down the "Ctrl" and "C" keys on your keyboard at the same time. You can also right-click on the selected area and click "Copy."

**Paste**: After copying the cell(s), select the area in the Excel template where you would like the contents to be pasted. Paste the contents into this area by holding down the "Ctrl" and "V" keys on your keyboard at the same time, or by right-clicking and selecting "Paste."

If you copied the contents of more than one cell, when pasted, these contents will occupy more than one cell as well. For example, if you copy a 3x2 matrix of cells, they will occupy a 3x2 matrix of cells when you paste them in another location.

**Copy and Paste Contents From Another Document**: You may find it necessary to paste data from an outside source—such as another Excel workbook or even a Microsoft Word document—into the data template.

You will need to have both files open at the same time to accomplish this. First, have the data template open. Next, open the other file by either (1) opening the other file from the folder (e.g., Desktop) to which it is saved or by (2) opening a blank Excel workbook by holding "Ctrl" and "N" at the same time, clicking File, then clicking "Open," and opening the file by navigating to the correct folder in the box that pops up.

Once both files are open at once, you can copy and paste data from one workbook to another, just as you would copy and paste within the same workbook. Select the cell(s) you wish to copy and hold down the "Ctrl" and "C" keys to copy. Minimize the window by clicking on the "minimize" button in the top-right corner of the screen. This will allow the other Excel file to be displayed. Then, select the area in the Excel template where you would like these contents to be pasted, and hold down the "Ctrl" and "V" keys to paste.

**Paste Special (Skip blanks)**: If you have already entered data for some sections of the survey into the Excel template, then you might need to use the "Paste Special: Skip blanks" function to avoid overwriting existing data when pasting new data for other sections.

Copy the data you want to paste just as you normally would, then click the location on the worksheet where you would like to paste the data.

Hold down the "Ctrl," "Alt," and "V" keys on your keyboard to pull up the Paste Special menu. Check the box next to "Skip blanks" on the Paste Special menu, and then click the "OK" button.



