Guide to Using the 2018 Election Administration and Voting Survey (EAVS) Data Templates

Table of Contents

Introduction

The 2018 Election Administration and Voting Survey (EAVS) data templates were created to help you supply the information that the Election Assistance Commission (EAC) has requested about the 2018 election cycle. The templates have been redesigned based on your comments and feedback.

There are two templates you can use to submit EAVS data:

- **Data Aggregation Template**—This template allows data to be directly pasted into the template by row or in a flat-file format. Once the data have been added into the spreadsheet, standard error checks can be run, and items flagged by validation checks will be presented in a separate error tab for review. The completed file can be uploaded to the EAVS Portal to submit the data.

- **Online Template**—This template allows users to enter data for a jurisdiction item-by item into an online survey. Built-in error checks will flag potential data issues as the data is inputted. The template will save the user's progress between sessions and will allow them to enter data in any order they wish. Once completed, jurisdiction-level data will be automatically imported into the state's Data Aggregation Template.

Both the Data Aggregation Template and the Online Template include extensive error checking. The information you enter for each jurisdiction will be checked for consistency and potential errors.

- **Sum validations:** Many items in EAVS ask for a total number and a breakdown of that total into subcategories. In these cases, the validation will highlight when the subcategories do not sum to the total.

- **Logic validations:** An alert will appear if a value appears to be incompatible with a response previously entered in the survey.

- **Confirmation validations:** When completing the survey, an alert will appear when items are missing or could have been reported incorrectly. These alerts will help you select the appropriate response.

- **Color-coded error checks (Data Aggregation Template only)**—when the above issues are flagged by the error check functionality in the Data Aggregation Template, the relevant cells will be color-coded to quickly highlight items that need further review.

The rest of these instructions describe how to use the Data Aggregation and Online Templates. Each section of this guide will walk you through the process of accessing the template, filling in your data, running error checks, and submitting your data to the EAVS project team.

It is a good idea to keep a hard copy of the 2018 EAVS Questionnaire nearby so you can refer to the question and its accompanying instructions when you are entering the data. This

is particularly important when using the Data Aggregation Template, as many of the question instructions are not incorporated directly into the template.

A brief tutorial for novice and beginner users of Excel is also found in the appendix. If you have questions about using Excel in general or about any aspects of the templates, please contact the technical assistance team at Fors Marsh Group (FMG) via email or telephone. Instructions for this can be found in the Further Assistance section of this guide.

The Data Aggregation Template

Getting Started with the Data Aggregation Template

The 2018 EAVS Data Aggregation Template is an application developed in Microsoft Excel. For you to use the Data Aggregation Template, it is recommended that you have Microsoft Excel 2007, 2010, or 2013, or Office 365 installed on your computer. The Data Aggregation Template is <u>not</u> compatible with Excel 2003 or earlier. If you are using Excel 2003 or earlier and had planned to submit your data using the Data Aggregation template, please contact the EAVS technical assistance team to discuss your options.

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

Opening and Saving the Template

To open the Data Aggregation Template the first time, you will need to download it from the EAVS Portal website. Once you log into the site using the portal credentials for your state (if you cannot find these credentials, please contact the technical assistance team), click on the "2018 EAVS Data Aggregation Template.xlsm" link to download the requested file and open it.

Microsoft Excel frequently opens files downloaded from the internet in Protected View. This disables editing functions to protect you from malicious files. Because the Data Aggregation Template comes from a trusted source, you can click "Enable Editing" to enable you to enter your data into the file.

Before proceeding any further, <u>you will need to save the file to a location on your computer</u>. This will ensure that you can find the file again later. To save the file, first select "Save As" to save the file to a local folder (e.g., "Desktop") on your computer. If you save the file somewhere other than a local folder—such as a network folder—you may have trouble saving the file later. If you are working in Excel 2003, you can save the file as you normally would save an Excel workbook. You may save the workbook under any name that you prefer—but make sure to use a name that you can remember easily.

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 are working in it to ensure that you do not lose any of your data.

For more detailed instructions on saving files in Excel, refer to the Appendix at the end of this guide.
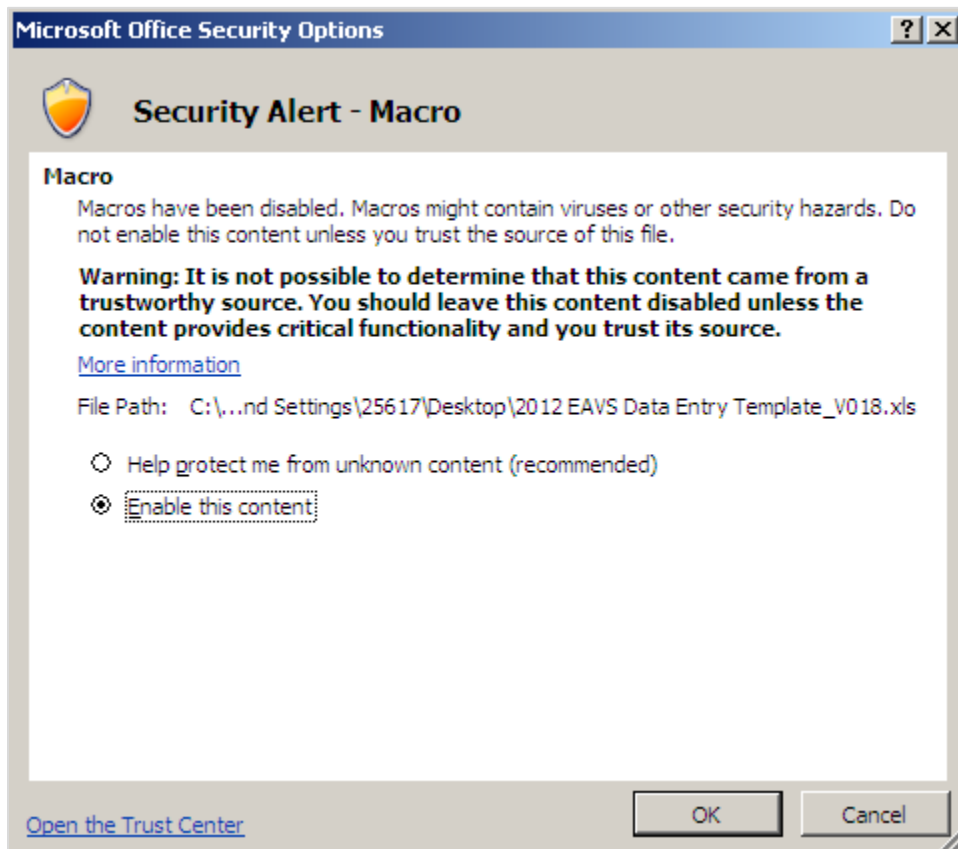
Enabling Macros in Microsoft Excel 2007

If you are using Microsoft Excel 2007, take the following steps to enable macros.

> **Step 1:** Click the "Options" button next to the "Security Warning" that appears below the Office Ribbon.
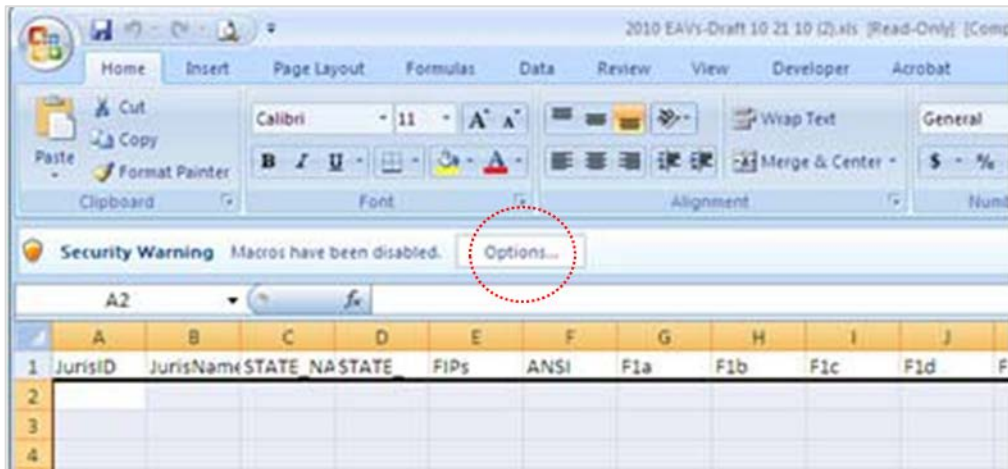
Step 2: In the pop-up box that appears, click "Enable this content" and click on "OK."

Enabling Macros in Microsoft Excel 2010 and 2013 and Office 365

If you are using Microsoft Excel 2010 or 2013 or Office 365, you only need to take one step to enable macros. Open the workbook and click on the "Enable Content" button next to the "Security Warning" that appears below the Office ribbon.
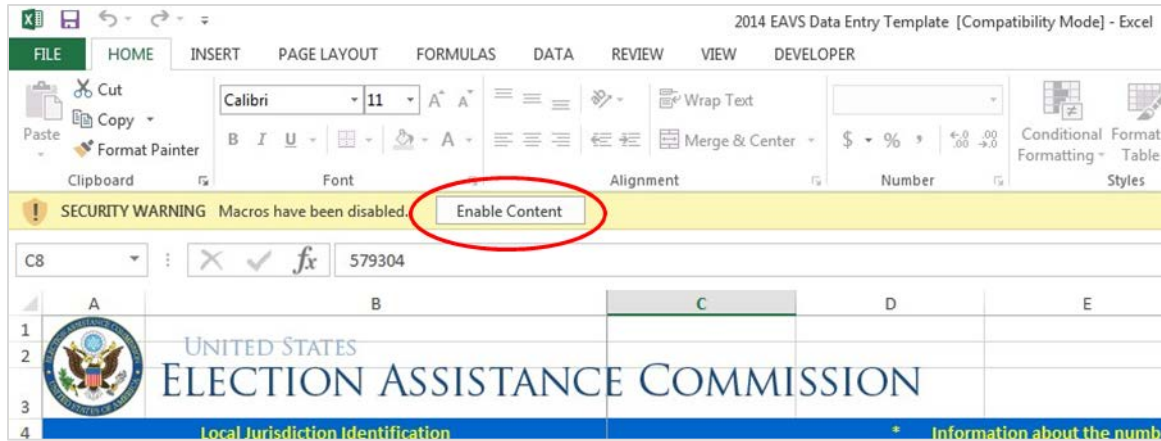
With the macros now enabled, you are ready to begin entering the information for the 2018 EAVS. You may need to re-enable macros each time you open the template file.

Navigating in the Data Aggregation Template

The 2018 EAVS Data Aggregation Template has two worksheets: RequiredVariables (the tab in which you will enter data) and RawErrorCodes (a tab containing codes to facilitate the error checking process). In addition, the error checking functionality will generate two tabs with error reports every time the Error Check button is clicked. To avoid interfering with the error checking functionality, do not delete tabsfrom or add additional tabs to the template. You also should not add to or delete columns from the RequiredVariables tab

Because of the number of columns and rows in use in the template, you will need to scroll left/right and up/down to view all the items in the RequiredVariables tab. This tab contains the following features:

- **Pre-filled list of jurisdictions:** The Data Aggregation Template contains all of your jurisdictions for which the EAC needs information. The FIPS code is found in Column A and the jurisdiction name is found in Column B. If you find a mistake in the jurisdiction list that was built into the template, contact us before starting to enter data, and we will update the template for you.

- **Variable names:** Located in Row 7. This row is shaded in gold.

- **Question instructions:** Located in Rows 4-6. These rows are shaded in blue. The Data Aggregation Template includes only brief instructions; for a full list of all survey instructions for each question, consult the PDF copy of the 2018 EAVS Questionnaire.

- **Total Check columns:** Many questions in the survey ask respondents to break total numbers down into subcategories. A Total Check column is included in the spreadsheet for jurisdictions that wish to check their totals as they enter data. For instance, Column AH is the Total Check column for question A3, and a formula can be added to this column that adds up the numbers submitted in items A3b-A3j.

These Total Check columns are not part of the official EAVS data submission and will not be included in the error check functionality. These columns are shaded a lighter shade of blue. For information on using these Total Check columns to check sums, see the Appendix. When copying and pasting data into the Data Aggregation Template, take care to work around these Total Check columns.

	DY	DZ	EA	EB	EC
3					
4			**UOCAVA Voters Registered and Elegible to Vote**		
5	UOCAVA Registered & Eligible - Total	UOCAVA Registered & Eligible - Uniformed Services Domestic or Foreign	UOCAVA Registered & Eligible - Non-military/Civilian Overseas	UOCAVA Registered & Eligible Total Check	UOCAVA Registered & Eligible Comments
6	Enter **Number** or N/A	Enter **Number** or N/A	Enter **Number** or N/A	Formula	Optional
7	B1a	B1b	B1c	B1Total	B1Comments
8					
9					

- **Comments**: Most questions will allow you to elaborate on your answers with comments. For instance, Column R is the comments section for question A1. These comments are optional, but we encourage you to use them to provide more information and context behind your data responses.

- **Error Check button**: Located in cell A5, this function runs a series of error checks to help ensure that your data is complete and accurate. See the "Error Checking in the Data Aggregation Template" section of this document for more information.

Entering Data in the Data Aggregation Template

The Data Aggregation 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, or just small portions of data. Content that you paste into the worksheet will lose any of its prior formatting once the error-checking procedure is run. This includes cell color, cell background, or bolded/underlined/italicized font.

You will be able to 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 Data Aggregation Template without the formatting from those outside sources interfering with the structure of the Template. If your data has delimiters (e.g. commas, tabs, etc.), you can easily paste it into the Excel Aggregation Template.

When adding data for different survey sections to the Data Aggregation Template, it may be

helpful to use the "Paste Special: Skip Blanks" function to avoid overwriting previously-entered data for other sections. See the "How to Copy and Paste Data" section in the Appendix for more information on using this Excel function.

Most questions in EAVS require a numerical or text response. Some questions use pull down menus with pre-filled options. You will not be able to type information into these columns with pull down menus, but you will be able to copy and paste into them.

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 (for instance, 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 on these categories. If you report information in the "Other" field, please use the comment boxes to provide an explanation for the answer.

Items should not be left blank—always provide an answer to the question asked. 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 Data Aggregation Template

The 2018 Data Aggregation Template has an error-checking procedure built in that will allow you to check your entire worksheet for potential data errors. To run the error-checking procedure, click the button labeled "Error Check" that is located on the data collection worksheet in cell A5.

After clicking the button, the procedure will check the entire worksheet at once. If a potential error is identified, a full error report will be generated on a separate tab labeled with the

State's name. A separate table will be generated for each jurisdiction within a State that has a potential error.

FIPS Code	Jurisdiction Name	Variable	Error	Cell
	Error Report:	**Arkansas**	(Cells with errors will be highlighted in red within worksheet)	
100002	Arkansas County	A10a	The total removal notices sent to voters between close of 2008 election registration and close of 2010 election registration (A10a) should not be more than 30% of the total number of persons who are registered to vote in jurisdiction (A1a).	EC9
100002	Arkansas County	A10a	The sum of the categories of removal notices sent (A10Total) cannot exceed the total number of removal notices sent to voters between close of 2008 election registration and close of 2010 election registration (A10a).	EC9
100002	Arkansas County	A11a	If there were more than 0 total removal notices sent to voters between close of 2008 election registration and close of 2010 election registration (A10a), the total number of voters removed from the voter registration rolls (A11a) should not exceed the total removal	EO9
100002	Arkansas County	A11a	The total number of voters removed of voters removed from the voter registration rolls (A11a) should not be more than 20% of the total number of persons who are registered to vote in jurisdiction (A1a).	EO9
100002	Arkansas County	A11a	The sum of the categories of reasons why voters were removed (A11Total) cannot exceed the total number of voters removed from the voter registration rolls (A11a).	EO9
100002	Arkansas County	A1a	If A2 "Jurisdiction uses only active voters" (2) is not selected, the sum of A3a and A3b cannot exceed A1.	O9
100002	Arkansas County	A2	Please fill in the cell with either N/A or the appropriate response	Q9
100002	Arkansas County	A3a	Please fill in the cell with either N/A or the appropriate response	T9

MandatoryVariables / Totals_Variables / Raw_ErrorCodes / **Arkansas**

In addition, the error checking functionality will color-code any cells in the RequiredVariables tab with potential errors. This will make it easy to identify items that need further review.

The following types of errors may be flagged:

- **Sum validations:** These validations will highlight when subcategories do not sum to the expected total.
    - Example: the total number of voters participating in the 2018 election 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 do not add up to the reported total, the cell corresponding to the total will be highlighted in orange. Please note that although the 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, the cell corresponding to F1a will be highlighted in orange, but the item(s) causing the error can be anywhere in F1a to F1h.

- **Logic validations:** These validations will highlight if a value is incompatible with a response previously entered in the survey.
    - Example: the number of domestic civilian by-mail votes counted, as reported in C3a, should not exceed the number of domestic civilian by-mail ballots returned by voters, as reported in C1b.
    - Color code – Green: when a reported value is not compatible with another response in the template, the cell will be highlighted in orange. In the example above, the cell corresponding to C1b would appear highlighted in orange in the spreadsheet. However, when looking for the source of the problem, the user should review the items mentioned in the error message to determine where is the issue (i.e., C3a and C1b in the example above).

- **Confirmation validations**: These validations will appear when items are missing or could have been reported incorrectly:
    - o Zeroes: should be reported when your jurisdiction collects data, but the numerical value of zero is the accurate response (e.g., state law allows for provisional balloting, but no voters submitted a provisional ballot, so "0" should be reported for E1a). Zeroes should not be reported when "Does Not Apply" or "Data Not Available" represent a more accurate response.
        - ▪ Color code: <u>Yellow</u> – all cells filled with zero in the template will be highlighted in yellow for revision to confirm that the response is a "true zero" and not a misreported "Does Not Apply" or "Data Not Available". These cells can be ignored after confirming that the highlighted cells are in fact "true zeroes".
    - o Does Not Apply: should be reported when a question does not apply to your state or jurisdiction (e.g., your state does not allow for online voter registration, so "Does Not Apply" should be selected as the response to A4c).
    - o Data Not Available: should be reported when the item is applicable to your jurisdiction but you do not have the data necessary to provide an answer (e.g. your jurisdiction uses DRE w/o VVPAT but did not track the number of these machines deployed in the election, so "Data Not Available" should be selected as the response to F5c).
    - o Missing Values: blank cells will be flagged when a value is expected for an item, but no response is provided. A cell should not be left blank if "Does Not Apply" or "Data Not Available" represent a more accurate response.
        - ▪ Color code: <u>Light Blue</u> – blank cells for which a response is expected will be highlighted in light blue to make it easy for the respondent to identify missing data and fill the cells appropriately.

The error checks in the Data Aggregation Template may take several minutes to run to completion. The more data you have entered in the template, the longer the error checks will take to complete. It is not unusual for the process to take up to five minutes. Do not interrupt Excel while the error checks are in process.

Please carefully review every validation error you receive. When corrections are warranted, make them directly in the "RequiredVariables" tab. If your data submissions are correct but the template still shows an error, use the comments boxes appended to each question to explain. This will help the EAC assess and report your data accurately. Any errors that were not corrected or explained in comments boxes will be flagged for further review after the data submission deadline.

You may run the error checks as many times as you wish within the Excel Aggregation Template; each time the "Error Check" button is clicked, the previous error report will be deleted and a new report will be generated that contains only current data issues.

The "Error Check" button will also automatically generate a State Total row in the RequiredVariables tab; this will be placed two rows 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.



Submitting Data in the Data Aggregation Template

Once all your data have been entered and you have addressed as many errors as possible, you may submit your completed Data Aggregation Template through the EAVS Portal. Make sure that 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 https://eavsportal.com/Account/Login and enter your login credentials. Click on "Choose File."
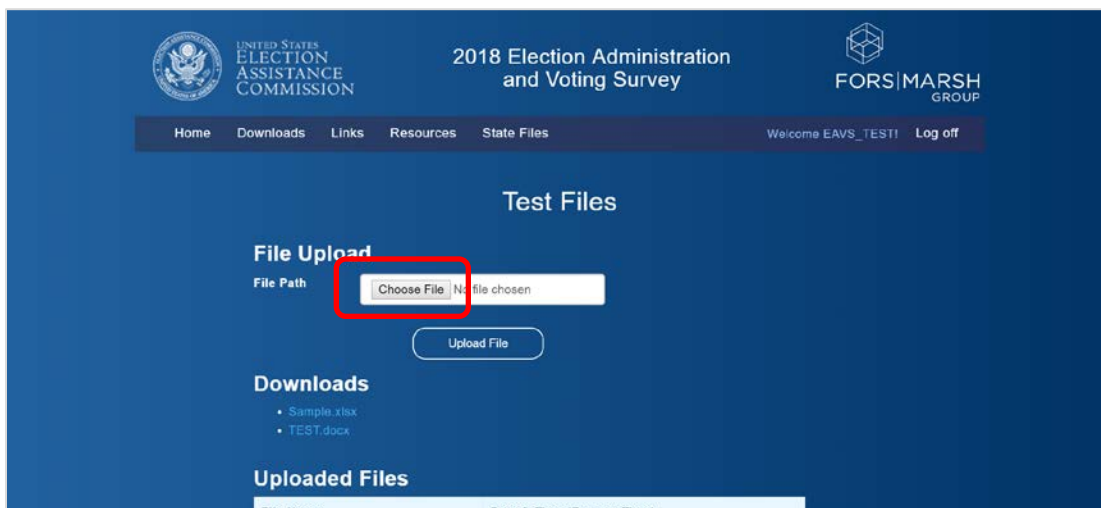
Navigate to the location where you saved the template on your local computer, and select "Open."
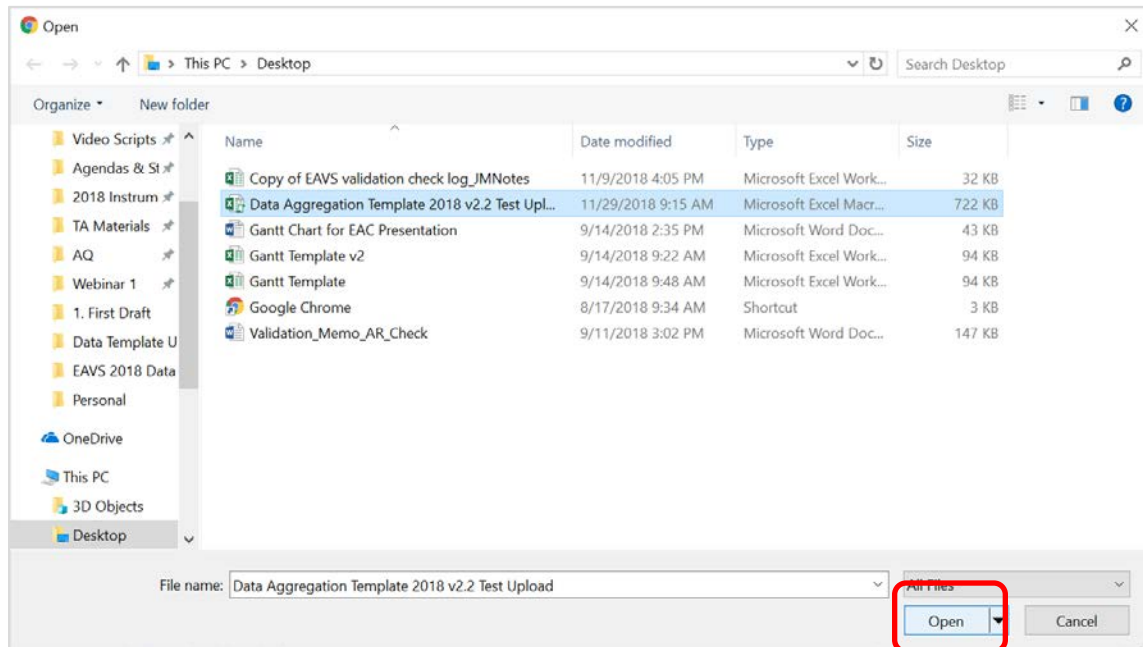
Verify that the correct filepath is listed in the textbox next to the Choose File button, and then click "Upload File." Once your file has been successfully uploaded, it will appear in your "Uploaded Files" pane with the date and time you submitted it.
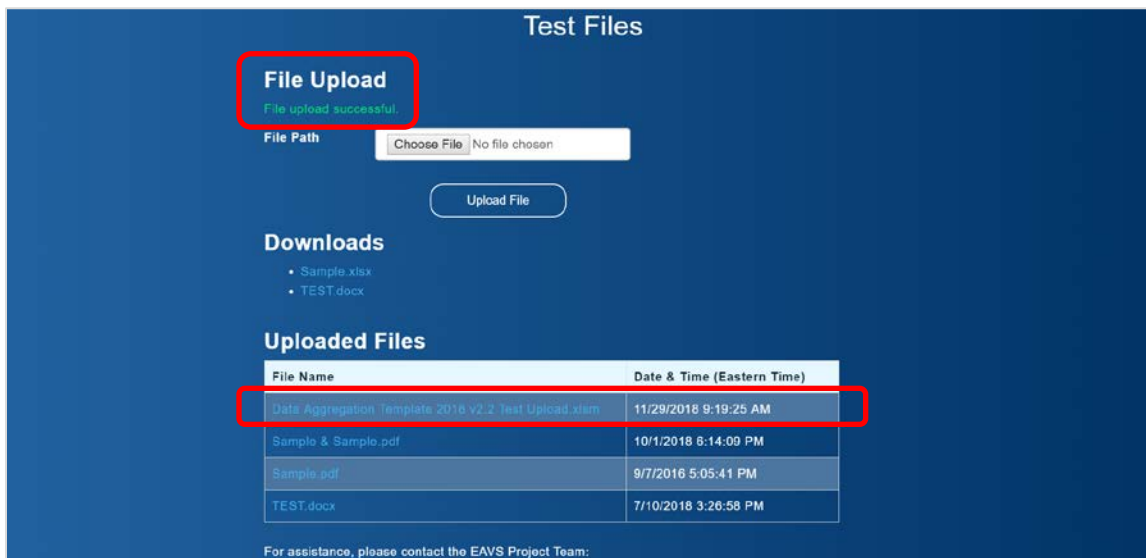
If the file upload fails, an error message will appear to describe what problem has occurred. Common reasons for failed uploads include:

- **File is too large:** The File Upload function on the EAVS Portal can only accept files that are less than 40 megabytes in size. If your file is larger than this, contact the

technical support team to discuss other ways to send your file.

- **File type error:** The EAVS Portal can only accept Excel files (.xlsx, .xlsm, .xltx, .xltm), Word files (.docs, .docm, .dotx, .dotm, .docb), and PDFs (.pdf). If you need to send another type of file, contact the technical support team.

- **Upload was interrupted:** This can occur when your internet connection is disrupted or the webpage was closed before the upload completed. If this occurs, wait a few minutes and attempt the upload again.

The Online Template

Getting Started with the Online Template

The Online Template is being offered for the first time in 2018 and provides a more user-friendly way to enter data item-by-item. The Online Template is available through the Links section of the EAVS Portal (https://eavsportal.com/Home/Links). You may also navigate directly to the survey at https://survey.eavsportal.com.
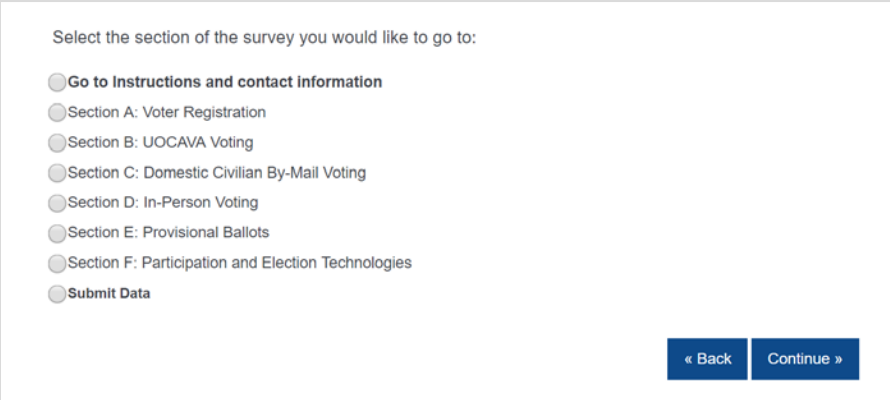
To login, you will need to enter the password for the jurisdiction for which you will be entering data. Those passwords have been provided to the EAVS point of contact (POC) for each state. If you have not received your password, or have misplaced it, please contact your state's POC or the technical assistance team.

The Online Template is most compatible with Internet Explorer, Mozilla Firefox, and Google Chrome. If you have difficulty accessing the survey, check that your browser is up-to-date or try a different browser. This survey is only compatible with desktop or laptop computers, not with mobile devices, cell phones, or tablets

Navigating in the Online Template

Once you have logged in to the online template, you will see an initial page asking for the contact information (name, title, office/agency name, address, email, telephone number, and fax number) of the person responsible for completing the EAVS in your jurisdiction. This information will only need to be entered once; however, should you need to return to this page to review the instructions or update the contact information, select the "Go to Instructions and contact information" option from the main menu of the survey.

The following page is the main menu, where you can choose which section you would like to navigate to. You do not have to complete sections in order, and will be able to navigate back to the main menu at any point by clicking the orange "Back to MAIN Menu" button.

Please note that some jurisdictions will be asked to complete only certain sections of the survey. Not all six 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, contact the person in your state election office who is responsible for completing EAVS.

When you first enter a section of the EAVS, you will see the main page of that section. This main page contains instructions that are relevant to completing that section of the survey. From there you can select the questions in that section that you would like to go to. If you want to navigate back to the main menu, simply click on the button in the top right corner of the screen.

As you navigate to the different questions within a section, there will always be a button in the top right corner allowing you to navigate back to the main page of that section. Clicking "Continue" will take you to the next questions in that section. For example, if you enter data into questions A1 and A2 and click "Continue" you will proceed to question A3.

When you finish a section of the survey, you will be directed back to the section's main menu. From there, you can navigate to the survey main menu and select another section to complete.

Entering Data in the Online Template

Most questions in EAVS require a numerical or text response. These questions can be answered by typing the answer into the text box. Alternatively, each question has an option to select a checkbox for "Data not available" and, where appropriate, a checkbox for "Does not apply."

Some EAVS questions will have pre-filled responses that will allow you to select one or more options.

D9. 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 2018 general election? Please check one option.

Very difficult ◯

Somewhat difficult ◯

Neither difficult nor easy ◯

Somewhat easy ◯

Very easy ◯

Not enough information to answer ◯

F7. Ballot marking devices

First ballot marking equipment in use in your jurisdiction

b. Make/Model

Select one... ▼

Select one...
AutoMARK (ES&S)
ExpressVote (ES&S)
ExpressVoteXL (ES&S)
ImageCast Evolution/ICE (Dominion)
ImageCast X/ICX BMD (Dominion)
InkaVote Plus (Los Angeles County)
OpenElect Voting Interface/OVI (Unisyn)
Verity Touch Writer (Hart)
VSAP Ballot Marking Device (Los Angeles County)
Other (use text box to describe)
Data not available

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 (for instance, 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 on these categories. If you report information in the "Other" field, please use the comment boxes to provide an explanation for the answer.

A3g. Address changes that cross jurisdiction borders:
Registrations that modified or edited the address of persons with current valid registrations, where the address change places them in a different jurisdiction (such as a different county) from their current registration.

A3h. Other:

A3i. Other:

A3j. Other:

A3 Comments:

Items should not be left blank—always provide an answer to the question asked. 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.

Note that hitting the "Enter" key on your keyboard to enter data may redirect you back to the main menu. If you notice this issue is affecting you, you can use the "Tab" key to navigate between active fields in the survey rather than the "Enter" key.

All data you enter in the online template will be automatically saved whenever you click the "Continue" button, even if you exit the survey. You do not have to fill out the entire survey in one sitting, but can come back to it at a later time.

Error Checking in the Online Template

Error checking 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 for potential errors. The following types of errors may be shown:

- **Sum validations:** These validations will highlight when subcategories do not sum to the expected total.
    - Example: the total number of voters participating in the 2018 election 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 highlight if a value is incompatible with a response previously entered in the survey.
    - Example: the number of domestic civilian by-mail votes counted, as reported in C3a, should not exceed the number of domestic civilian by-mail ballots returned by voters, as reported in C1b.

- **Confirmation validations:** These validations will appear when items are missing or could have been reported incorrectly:
    - Zeroes: should be reported when your jurisdiction collects data, but the numerical value of zero is the accurate response (e.g., state law allows for provisional balloting, but no voters submitted a provisional ballot, so "0" should be reported for E1a). Zeroes should not be reported when "Does Not Apply" or "Data Not Available" represent a more accurate response.
    - Does Not Apply: should be reported when a question does not apply to your state or jurisdiction (e.g., your state does not allow for online voter registration, so "Does Not Apply" should be selected as the response to A4c).
    - Data Not Available: should be reported when the item is applicable to your jurisdiction but you do not have the data necessary to provide an answer (e.g. your jurisdiction uses DRE w/o VVPAT but did not track the number of these machines deployed in the election, so "Data Not Available" should be selected as the response to F5c).

o Missing Values: blank cells will be flagged when a value is expected for an item, but no response is provided. A cell should not be left blank if "Does Not Apply" or "Data Not Available" represent a more accurate response.

Data validations will run on each page once you click "Continue." Relevant validation messages will appear in red text on the page. If multiple items are identified for review, they will be numbered accordingly.

- [1] The amounts you report in B1b-c should equal the total number of registered and eligible UOCAVA voters you report in B1a.
- [2] Please respond to highlighted items. Please make sure that your response is a "true zero" (you collected information for this item but no response fits in this category). If you do not have information to respond the item, please change your response to "Data Not Available".
- [3] Please review your response and make sure that you do not have data for this item. If you collect the information but no response fits in this category, please enter "0".

		Data not available
B1a. TOTAL registered and eligible: Report the total number of registered voters covered under UOCAVA for the November 2018 general election. Include active and inactive voters and any persons who might have registered as UOCAVA prior to or on Election Day. If the total number of registered and eligible voters who were covered by UOCAVA in the November 2018 general election in your jurisdiction is zero, report "0" for B1a.	200	☐
[3]B1b. Uniformed Services voters Members of the Uniformed Services and their eligible dependents—domestic or foreign		☑
[2]B1c. Non-military/civilian overseas voters	0	☐

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 submissions are correct but the template still shows an error, use the comments boxes appended to each question to explain. This will help the EAC assess and report your data accurately. Any errors that were not corrected or explained in comments boxes will be flagged for further review after the data submission deadline.

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 back to the survey main menu and select "Submit Data."

Submitting your data through this page will lock your survey and you will be unable to reopen it or edit your answers. Do not submit until you are sure that all recorded answers are final. When ready to submit, check the checkbox to agree to lock your data submission and then click the blue "Submit Data" button. If you are not ready to submit your data, click the blue "Return to Survey Navigation" button to return to the survey.


If your data has been locked in the Online Template and you need to access the survey again, contact your state's EAVS point of contact and the EAVS technical support team.

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 will format data submitted via the Online Template and transfer it into a state's Data Aggregation Template, and vice versa. Data submitted via the Online Template will be posted to the EAVS data portal nightly and available for download the next day. This section discusses how that process occurs.

Coordinating Jurisdiction Data Collection using the Online Template

The Online Template can help state Points of Contact (POCs) coordinate data collection with local jurisdictions. Each jurisdiction has a unique userID to access the survey; these have been provided to state POCs through the EAVS portal website (https://eavsportal.com/). The online survey instrument includes EAVS questions from each section of the survey. **State POCs who would like to use the Online Template to collect data from their jurisdictions for only certain survey questions or sections should contact the technical assistance team** to get this set up. The project team will need to know which question(s) or section(s) are to be completed by local jurisdictions. Data collected from jurisdictions using the Online Template will be exported to the Data Aggregation Template through this process:
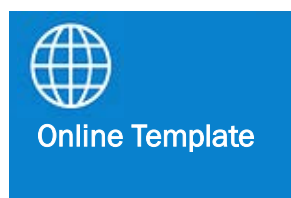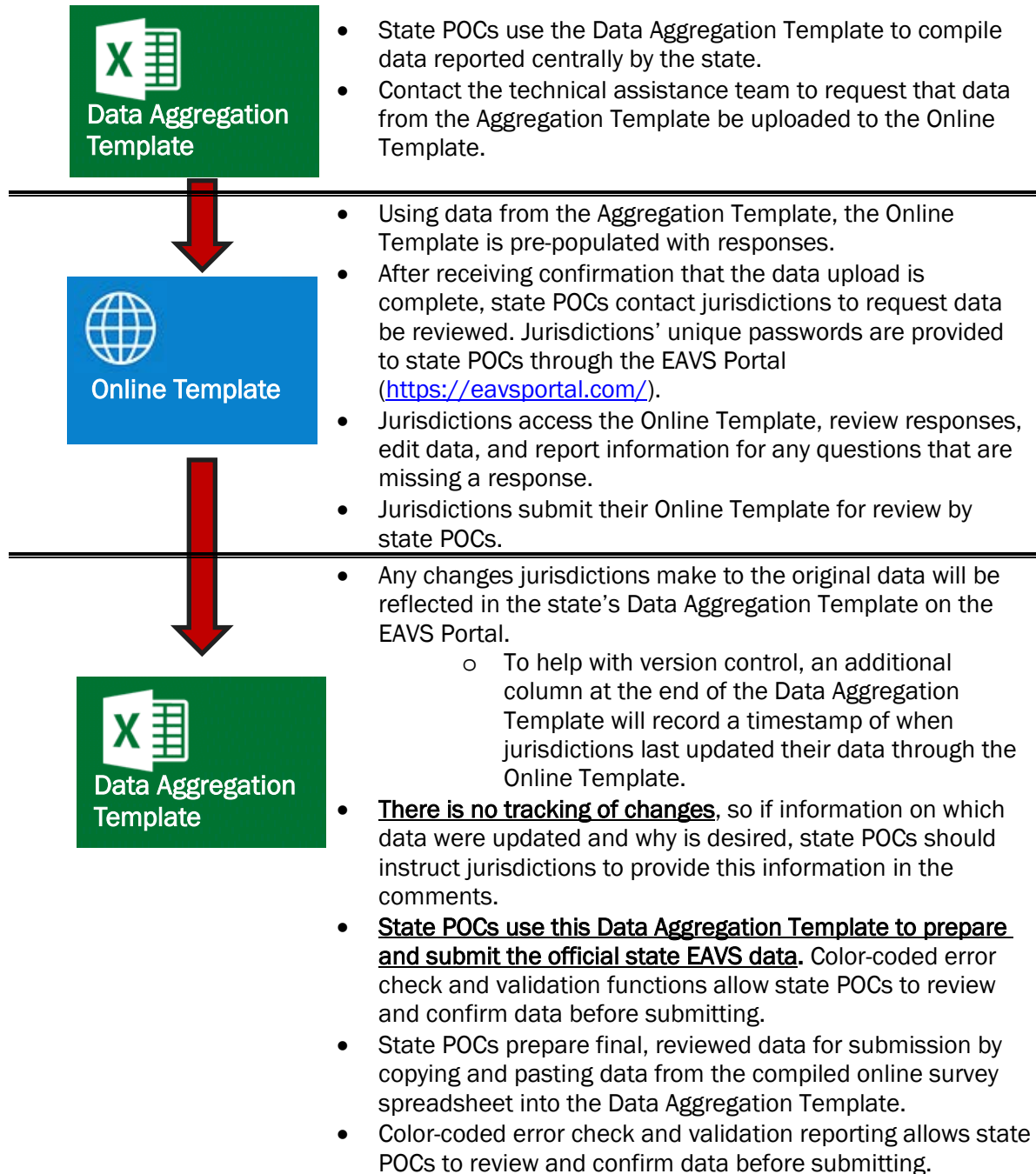
Online Template

- State POCs distributes passwords and any special instructions to local election jurisdictions.
- Users access the survey and enter their password to login.
- Online Template walks users through the survey, item by item, with real-time error checking to flag potential issues as data are entered.
- Data are automatically saved so users can return and continue later.
- When survey is complete, data are submitted directly to state POCs for review.

Data Aggregation Template

- Data reported through the Online Template are compiled and formatted into the state's Data Aggregation Template. This file is updated daily with the most recent data from the Online Template.
  - To help with version control, an additional column at the end of the Data Aggregation Template will record a timestamp of when jurisdictions last updated their data through the Online Template.
- **State POCs should use this template to prepare and submit the official state EAVS data.** Color-coded error check and validation functions allow state POCs to review and confirm data before submitting.

Using the Online Template for Jurisdiction Review of State Data

The online survey instrument can also be used to allow jurisdictions to review and update data reported centrally by the state.

- State POCs use the Data Aggregation Template to compile data reported centrally by the state.
- Contact the technical assistance team to request that data from the Aggregation Template be uploaded to the Online Template.

- Using data from the Aggregation Template, the Online Template is pre-populated with responses.
- After receiving confirmation that the data upload is complete, state POCs contact jurisdictions to request data be reviewed. Jurisdictions' unique passwords are provided to state POCs through the EAVS Portal (https://eavsportal.com/).
- Jurisdictions access the Online Template, review responses, edit data, and report information for any questions that are missing a response.
- Jurisdictions submit their Online Template for review by state POCs.

- Any changes jurisdictions make to the original data will be reflected in the state's Data Aggregation Template on the EAVS Portal.
    - o To help with version control, an additional column at the end of the Data Aggregation Template will record a timestamp of when jurisdictions last updated their data through the Online Template.
- **There is no tracking of changes**, so if information on which data were updated and why is desired, state POCs should instruct jurisdictions to provide this information in the comments.
- **State POCs use this Data Aggregation Template to prepare and submit the official state EAVS data.** Color-coded error check and validation functions allow state POCs to review and confirm data before submitting.
- State POCs prepare final, reviewed data for submission by copying and pasting data from the compiled online survey spreadsheet into the Data Aggregation Template.
- Color-coded error check and validation reporting allows state POCs to review and confirm data before submitting.

Further Assistance

If you have questions about submitting your data that are not answered in this guide, please reach out to the EAVS project team by email (eavs@forsmarshgroup.com) or by telephone.

When sending an email, include screenshots of any errors you are encountering if it is possible; this will help the project team provide customized support to you.

Appendix

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

- How to use the Total Check columns during data entry
- How to identify which version of Excel you have
- How to save Excel files
- Components of an Excel workbook
- How to copy and paste data

Using the Total Check Columns

The Total Check columns in the Data Aggregation Template have been left blank; however, it is simple to add formulas that will assist in summing subitems of EAVS questions. The following table provides formulas that can be copied and pasted into the Total Check columns; they have been constructed to exclude text and missing data codes.

EAVS Question	Corresponding Total Check Column	Formula
A3	AH	=SUMIF(V8:AG8,">0")
A4	AY	=SUMIF(AK8:AX8,">0")
A5	BO	=SUMIF(BA8:BN8,">0")
A6	CE	=SUMIF(BQ8:CD8,">0")
A7	CU	=SUMIF(CG8:CT8,">0")
A8	DH	=SUMIF(CX8:DG8,">0")
A9	DW	=SUMIF(DK8:DV8,">0")
B1	EB	=SUMIF(DZ8:EA8,">0")
B2	EG	=SUMIF(EE8:EF8,">0")
B3	EL	=SUMIF(EJ8:EK8,">0")
B5	ES	=SUMIF(EQ8:ER8,">0")
B6	EW	=SUMIF(EU8:EV8,">0")
B7	FA	=SUMIF(EY8:EZ8,">0")
B8	FE	=SUMIF(FC8:FD8,">0")
B9	FJ	=SUMIF(FH8:FI8,">0")
B10	FN	=SUMIF(FL8:FM8,">0")
B11	FR	=SUMIF(FP8:FQ8,">0")
B12	FV	=SUMIF(FT8:FU8,">0")
B13	GB	=SUMIF(FY8:GA8,">0")
B14	GG	=SUMIF(GE8:GF8,">0")
B15	GK	=SUMIF(GI8:GJ8,">0")
B16	GO	=SUMIF(GM8:GN8,">0")
B17	GS	=SUMIF(GQ8:GR8,">0")
B18	GX	=SUMIF(GV8:GW8,">0")
B19	HB	=SUMIF(GZ8:HA8,">0")
B20	HF	=SUMIF(HD8:HE8,">0")

EAVS Question	Corresponding Total Check Column	Formula
B21	HJ	=SUMIF(HH8:HI8,">0")
B22	HN	=SUMIF(HL8:HM8,">0")
B23	HS	=SUMIF(HQ8:HR8,">0")
B24	HW	=SUMIF(HU8:HV8,">0")
B25	IA	=SUMIF(HY8:HZ8,">0")
B26	IE	=SUMIF(IC8:ID8,">0")
C1	IS	=SUMIF(IH8:IR8,">0")
C4	JT	=SUMIF(IZ8:JS8,">0")
D4	KF	=SUMIF(KD8:KE8,">0")
D5	KJ	=SUMIF(KH8:KI8,">0")
D8	KV	=SUMIF(KP8:KU8,">0")
E1	LF	=SUMIF(LA8:LE8,">0")
E2	LX	=SUMIF(LI8:LW8,">0")
F1	MI	=SUMIF(MA8:MH8,">0")

To use these formulas, copy the formula from the table, navigate to the appropriate column in the Data Aggregation Template, and paste it into row 8 of the Total Check column that is specified in the table.

This will provide a Total Check for the first jurisdiction in the spreadsheet. Select the cell that has the formula you want to fill into adjacent cells. Rest your cursor in the lower-right corner so that it turns into a plus sign (+), then left-click and drag your mouse down until all cells you wish to fill with the formula have a thick green border. Release your mouse button and

Excel will automatically fill in the formula.

The formulas will be wiped from the Total Check columns each time the Error Check button is clicked, although the sums will remain. The Total Check formulas can be re-added to the spreadsheet after error checking by repeating the above steps.

Which Version of Microsoft Excel Do I Have?

You may find it helpful to know which version of Excel you are working in, as some features of the program have changed over the years. The process for saving a file, for example, differs slightly between Excel 97–2003 and Excel 2007, 2010, or 2013, and Office 365, so you will want to know which version of Excel you have before working in the template. This will also help if you need to talk with your point of contact at FMG about any issues regarding the Data Aggregation Template.
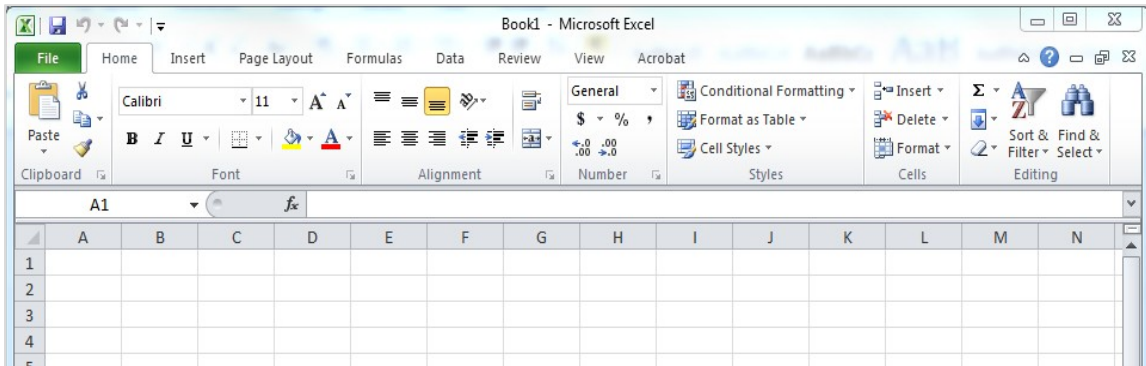
To determine which version of Excel you have, first open either the 2018 EAVS Data Aggregation Template or a blank Excel workbook.

If you are using Office 365, the Excel menu will look similar to the image below:
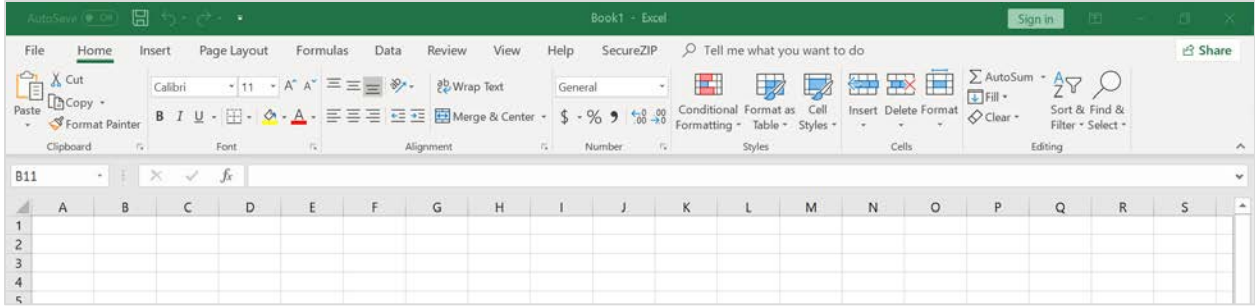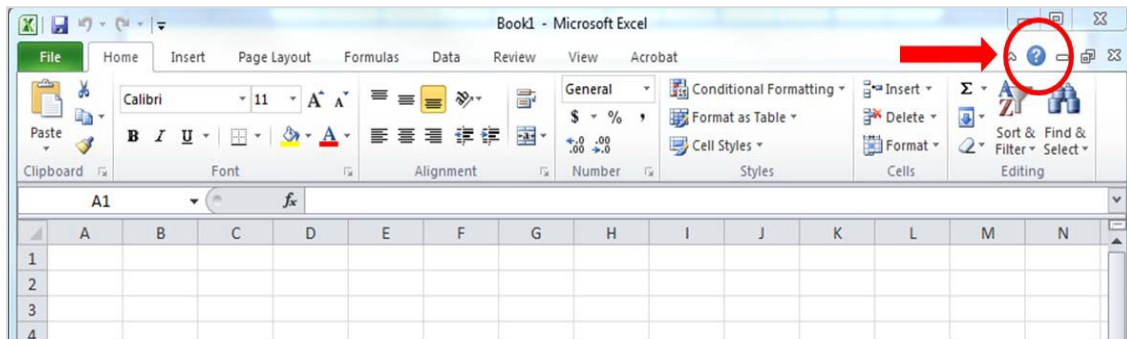
If you are using Excel 2007, 2010, or 2013, the Excel menu will look similar to the image below:
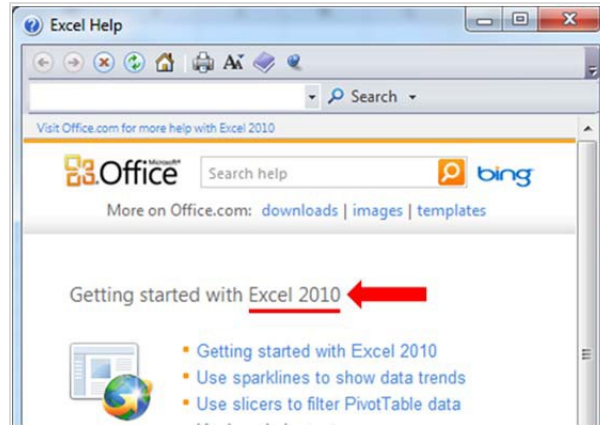

To distinguish between Excel 2007 and Excel 2010, click on the "?" icon (blue in 2007 and 2010) in the upper-right corner.
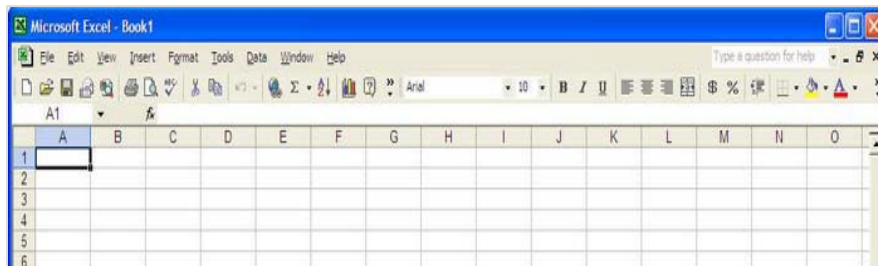

A box will pop up indicating the version of Excel you are working in.
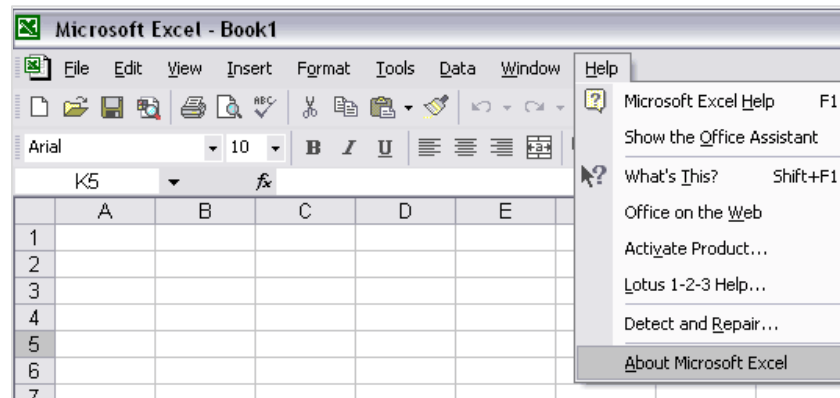
If you are using an early version of Excel (Excel 97–2003), the Excel menu will look similar to this:

To determine the exact version of Excel, go to the "Help" menu and click on "About Microsoft Excel".

A box will appear displaying information about the Excel version you are using.

Saving a File in Excel

Once you begin working in the Data Aggregation 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."
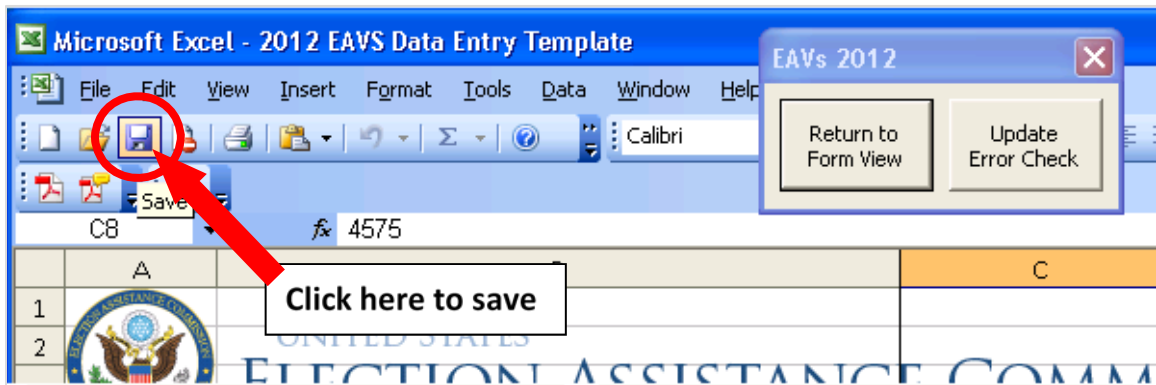
Saving in Excel 97–2003

If you are using any version of Excel between Excel 97 and Excel 2003, to save the file (also known as an Excel "workbook") for the first time, click on "File" and select "Save As."
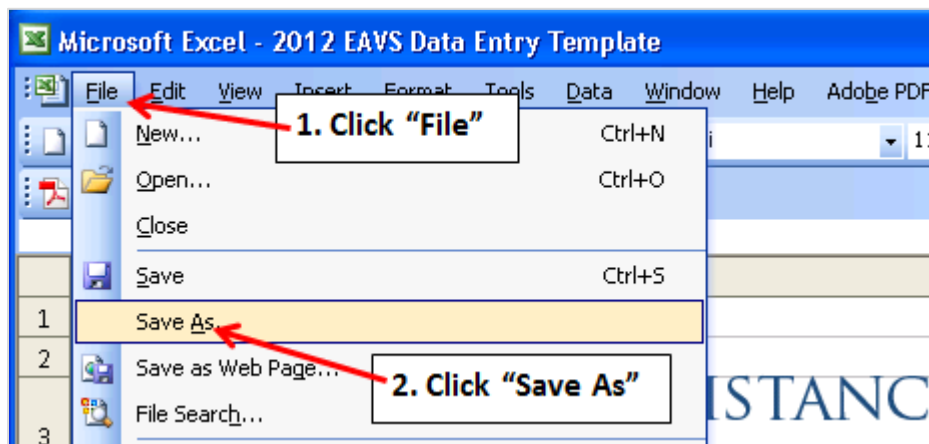
You will then need to specify a file path (i.e., the location on your computer) to which to save the workbook. You also need to create a name for the file. Click "Save" or hit "Enter" on your keyboard when done.
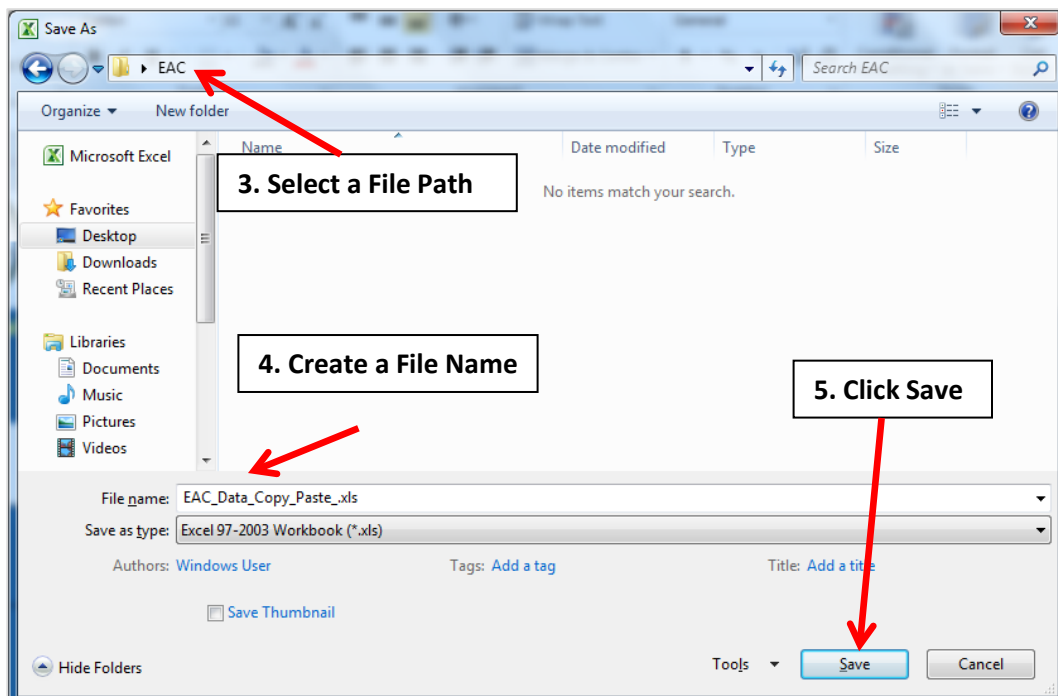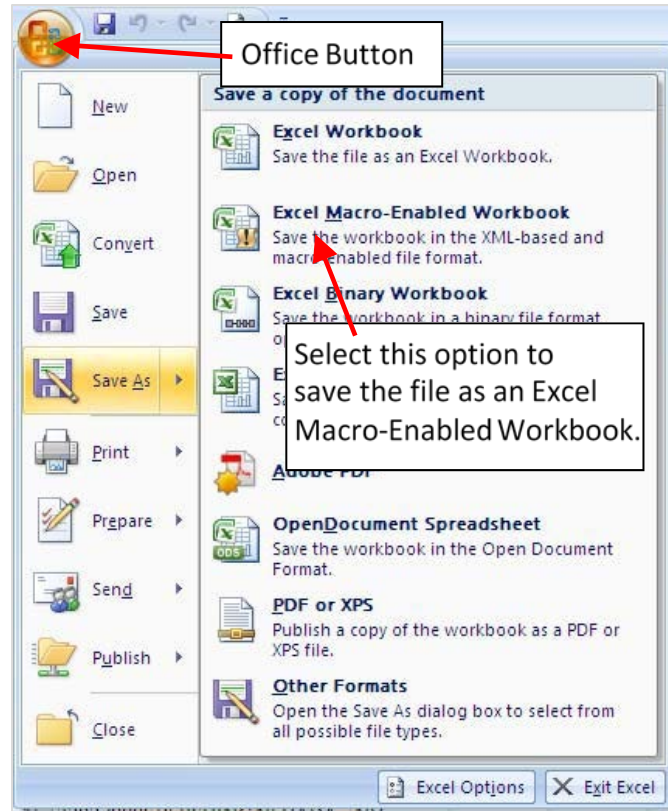
Once you have saved the file using the "Save As" option, you will subsequently only need to use the "save" function to save your work. You can save your work by selecting the "Save" icon in the Excel menu bar or by pushing the "Ctrl" and "S" buttons on your keyboard at the same time. If you want to save different versions of the file, then use the "Save As" command to save under different file names.


### *Saving in Excel 2007, 2010, or 2013*

Saving a workbook in Excel 2007 and 2010 involves the same process as saving in Excel 97–2003. However, one extra step is involved—you need to specify the correct file extension to ensure that certain features of the Data Aggregation Template are not lost. You will need to save it as an Excel Macro-Enabled Workbook (.xlsm).

Excel 2007: In order to "Save As," click on the "Office Button" in the top-left corner. Move your mouse down to the "Save As" button, then click "Excel Macro-Enabled Workbook" from among the options directly to the right. You will then need to create a name for the workbook and select the file path to which you will save the workbook.

Excel 2010 or 2013: In order to "Save As," click on "File" from the menu bar in the top-left corner and select "Save As" from the options on the left. The "Save as type" drop-down menu allows you to specify the file extension you will save the workbook as.
Select "Excel Macro-Enabled Workbook"; this should be the default option. To finish saving, create a file name for the workbook and select the file path to which you will save the workbook.
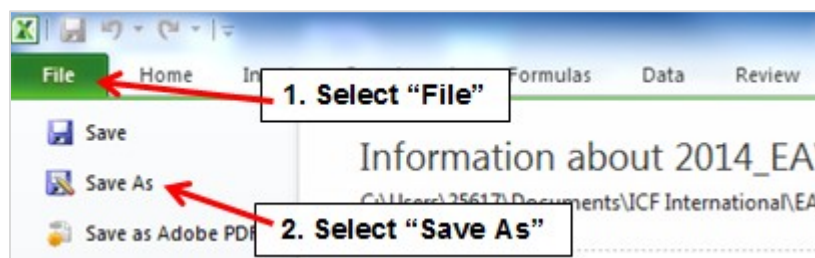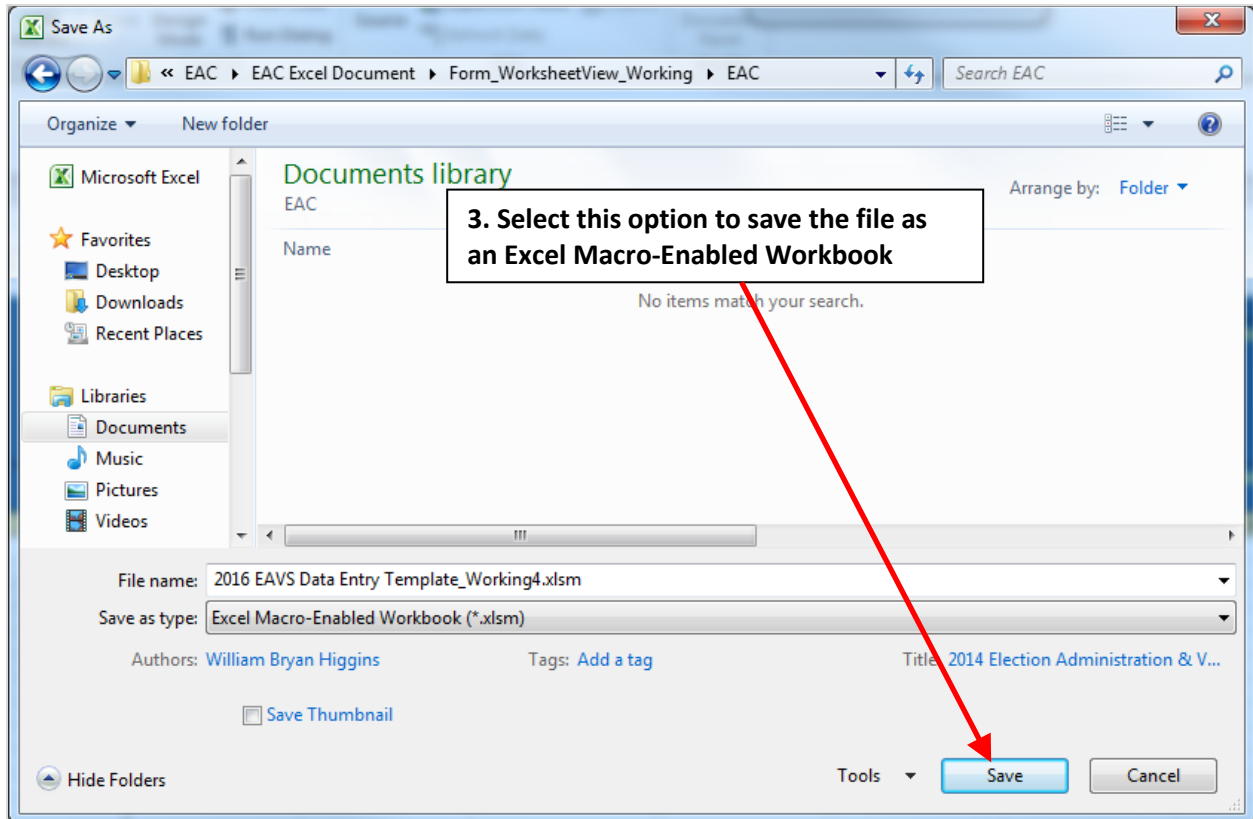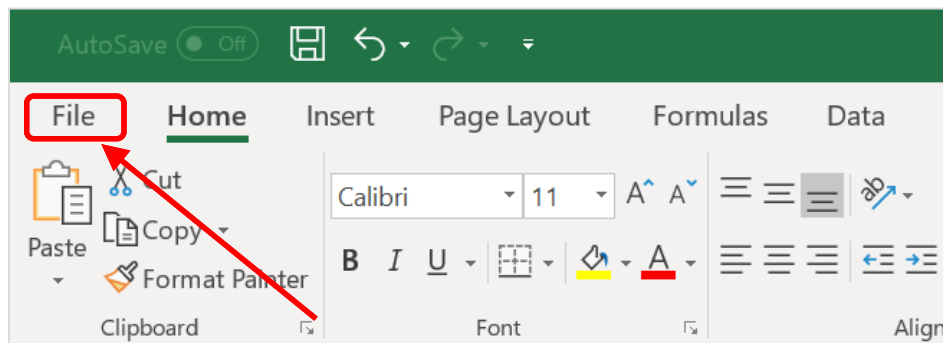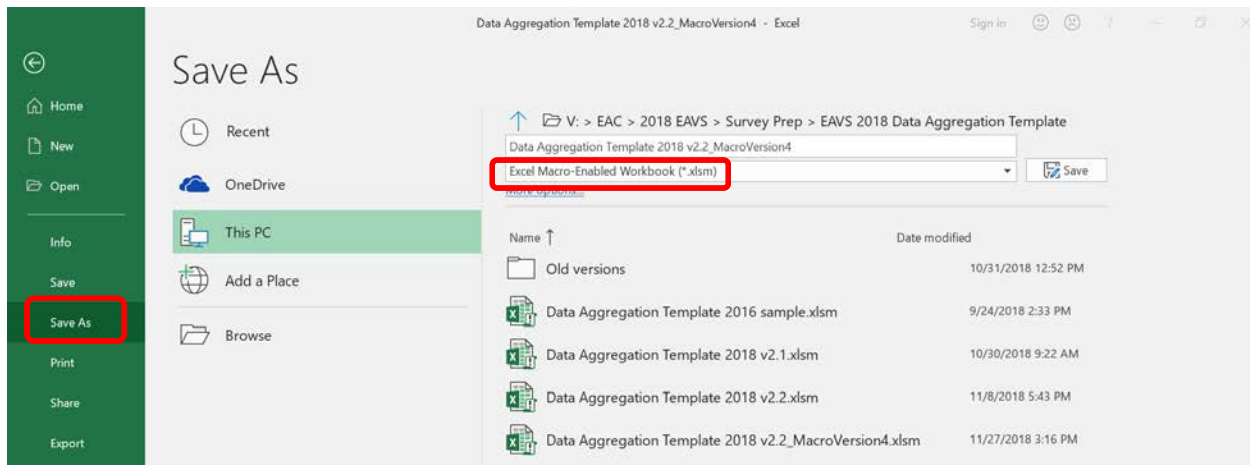
Just as in Excel 97–2003, in Excel 2007 and 2010, once you have saved the file using the "Save As" option, you will subsequently only need to use the "Save" function to save your work. You can save your work by selecting the "Save" icon in the Excel menu bar or by pushing the "Ctrl" and "S" buttons on your keyboard at the same time.

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) to which to save the workbook. You also need to create a name for the file. Double-check that your file is being saved as an Excel Macro-Enabled Workbook (*.xlsm). Click "Save" or hit "Enter" on your keyboard when done.

Just as other versions of Excel, once you have saved the file using the "Save As" option, you will subsequently only need to use the "Save" function to save your work. You can save your work by selecting the "Save" icon in the Excel menu bar or by pushing the "Ctrl" and "S" buttons on your keyboard at the same time.

Components of an Excel Workbook

Before you begin working in the Data Aggregation Template, it's 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 Data Aggregation Template, including all worksheets.

Worksheet: Worksheets are the specific tabbed sections contained in the workbook. A blank workbook contains three worksheets by default (Sheet1, Sheet2, Sheet3).

Excel's menus and toolbars—which cover approximately the top quarter of the screen—differ slightly between Excel 2003, 2007, 2010, and 2013 and Office 365. These features can be used to format and adjust the appearance of the worksheets, sort data, insert formulas, and 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 above) and perform basic commands, such as "copy" and "paste" (which will be covered below), you won't 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 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. If the workbook contains a large number of worksheets, not all sheet tabs will be 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 2018 EAVS Data Aggregation Template are very large. You will need to scroll horizontally to view all of 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.

The figure below highlights where these Excel features can be found.
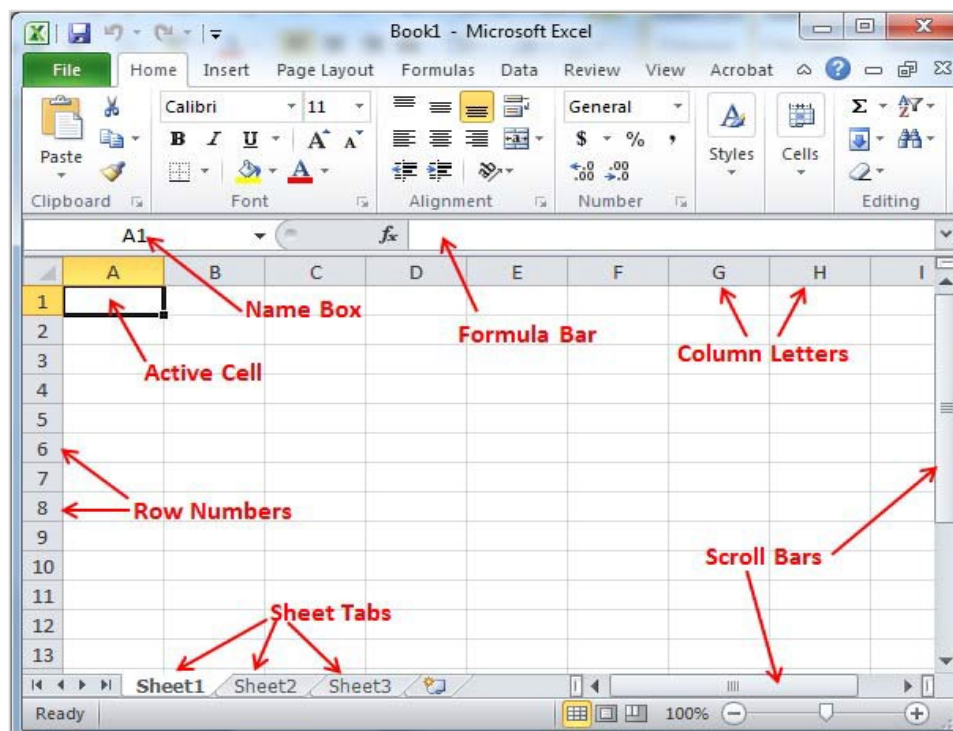
How to Copy and Paste Data

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

Copy: To do this, you first need to select the cell or the specific contents of a cell(s) that you

wish to copy. Then, to copy, hold down the "Ctrl" and "C" keys on your keyboard at the same time. You can also right-click on the selected area and then click "Copy" to do this.

Paste: After copying the cell(s), select the area in the Data Aggregation Template where you would like the contents to be pasted. Then 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 an MS 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 Excel file by either (1) opening the other file from the folder (e.g., Desktop) to which it's saved or (2) opening a blank Excel workbook by holding "Ctrl" and "N" at the same time, then clicking "File" (or the Start ribbon, if you're using Excel 2007), 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 "Ctrl" and "C" 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 Data Aggregation Template where you would like these contents to be pasted, and hold down "Ctrl" and "V" to paste.
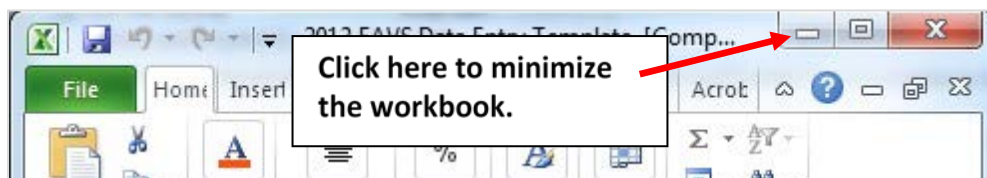
Paste Special (Skip blanks): If you have already entered data for some sections of the survey into the Data Aggregation Template, you may need to use the "Paste Special: Skip blanks" function to avoid overwriting existing data when pasting new data for other sections.

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

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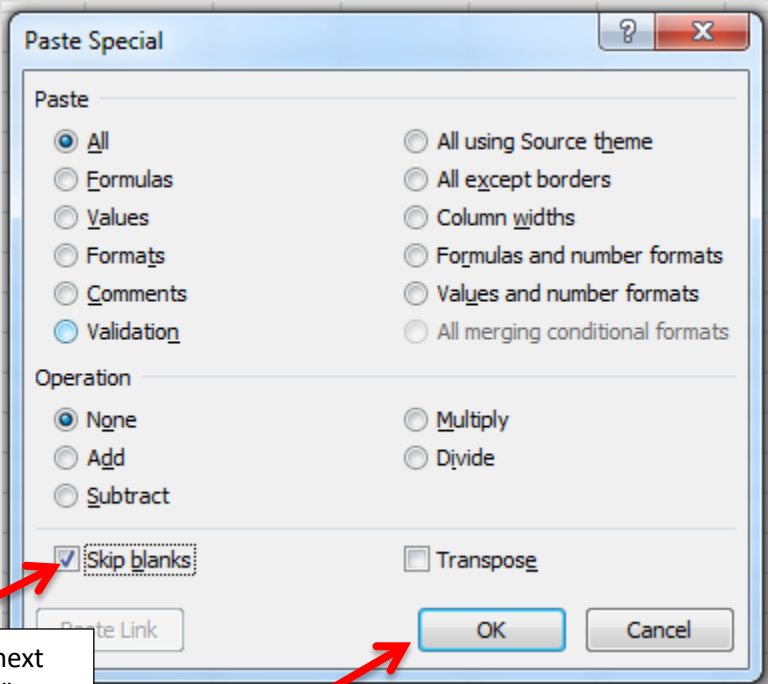
Check the box next to "Skip blanks."

Click the "OK" button to paste data.