



# 2020 Election Administration and Voting Survey (EAVS)

Guide to Using the Data Collection Templates

## Table of Contents

Introduction.....	1
The Excel Template .....	2
Getting Started with the Excel Template.....	2
Opening and Saving the Excel Template .....	2
Navigating in the Excel Template.....	4
Entering Data in the Excel Template .....	6
Error Checking in the Excel Template.....	7
Submitting Data Using the Excel Template.....	10
Submitting Final, Certified State Data using the Excel Template .....	12
The Online Template.....	13
Passwords for the Online Template .....	13
Getting Started with the Online Template .....	13
Navigating in the Online Template .....	14
Entering Data in the Online Template.....	17
Error Checking in the Online Template .....	19
Submitting Data in the Online Template.....	21
Submitting Final, Certified Data Using the Online Template .....	22
Transferring Data Between Templates.....	23
Coordinating Jurisdiction Data Collection using the Online Template .....	23
Using the Online Template for Jurisdiction Review of State Data .....	24
Using the EAVS Portal to Track Jurisdiction Progress in Online Template.....	24
Requesting Further Assistance with the Data Collection Templates .....	26
Appendix .....	27
Which Version of Microsoft Excel Do I Have? .....	27
Saving a File in Excel.....	29
Components of an Excel Workbook .....	33
Freezing Panes in Excel.....	34
Using Notes in Microsoft Excel .....	35
How to Copy and Paste Data .....	36



## 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 2020 Election Administration and Voting Survey (EAVS). These data templates have been redesigned and updated since the 2018 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 jurisdictions that 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 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 highlight 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 a response previously entered in the survey.
- **Policy Survey validations:** These validations will highlight when an EAVS item is incompatible with a response reported by the state in the 2020 Policy Survey.
- **Missing data validations:** Except for 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 checks (Excel template only):** When the above issues are flagged by the error check 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 you through the process of accessing the template, filling in your data, running error checks, and submitting your data to the EAVS project team. This guide also covers how data transfers between the templates and how state EAVS points of contact (POC) can customize the online template.

It is a good idea to keep a hard copy of the [2020 EAVS Questionnaire](#) nearby so you can refer to the question and its accompanying instructions when you are entering the data.

A brief tutorial for novice and beginning users of Excel is found in the [Appendix](#) of this user guide. If you have questions about using Excel in general or about any aspects of the templates, then please [contact the EAVS project team](#) at Fors Marsh Group (FMG).



# The Excel Template

## Getting Started with the Excel Template

The 2020 EAVS Excel template works best in Microsoft Excel 2007, 2010, or 2013, or Office 365. The Excel template is not compatible with Excel 2003 or earlier. If you cannot use a more recent version of Excel, please [contact the EAVS project 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.

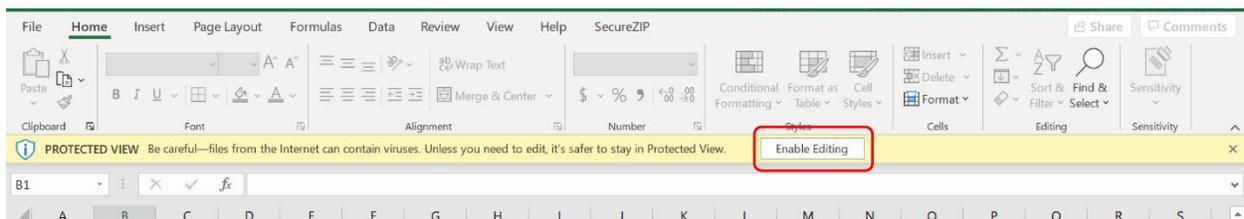
## Opening and Saving the Excel Template

State EAVS points of contact (POC) can download their state’s Excel template from the EAVS Portal (<https://eavsportal.com/>) by logging in using the state’s assigned Portal credentials. If you are a state EAVS POC and cannot locate the credentials to access the EAVS Portal, then please contact the project team.

The file is located on the State Files page under the “Downloads” header. The file is named “2020\_EAVS\_Excel\_Template\_[your state’s postal abbreviation].xism”; click on the file name to download 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 Excel template comes from a trusted source, you can click “Enable Editing” to allow you to enter your data into the file.

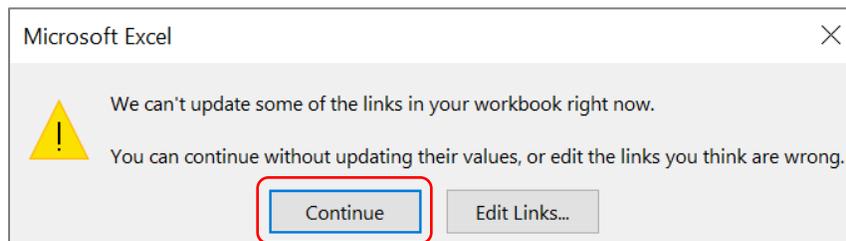




Before proceeding any further, **you will need to save the file to a location on your computer.** This will ensure that you can find the file again later and do not lose any data you have entered into the template. To save the file, first select “Save As” to save the file to a local folder on your computer. If you save the file somewhere other than a local folder—such as a network folder—you may have trouble saving the file later. The file must be saved as an Excel Macro-Enabled Workbook (\*.xism) 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.

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 data. For more detailed instructions on [saving files in Excel](#), refer to the Appendix at the end of this user guide.

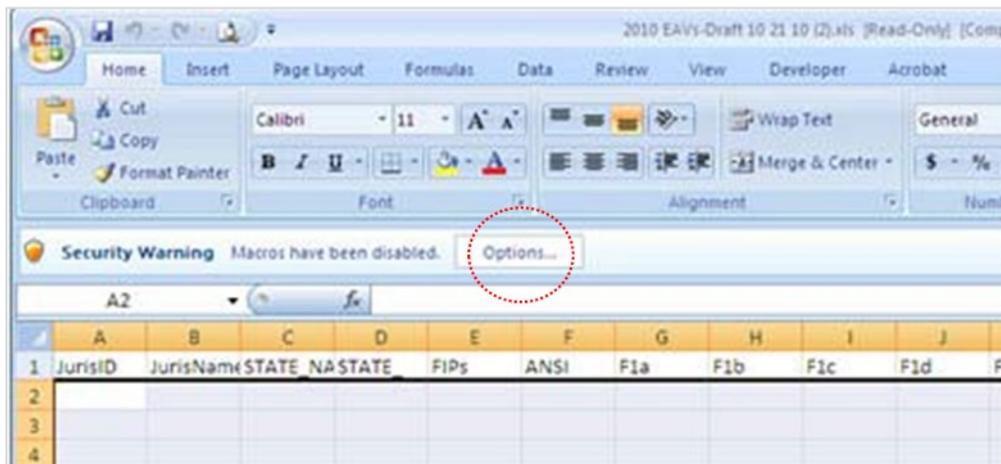
Additionally, when you open the template, Excel may show a pop-up notifying you that it cannot update some of the links in the workbook. If you see this prompt, you may select “Continue” to edit the workbook without updating the links. This will not affect the functionality of the file.



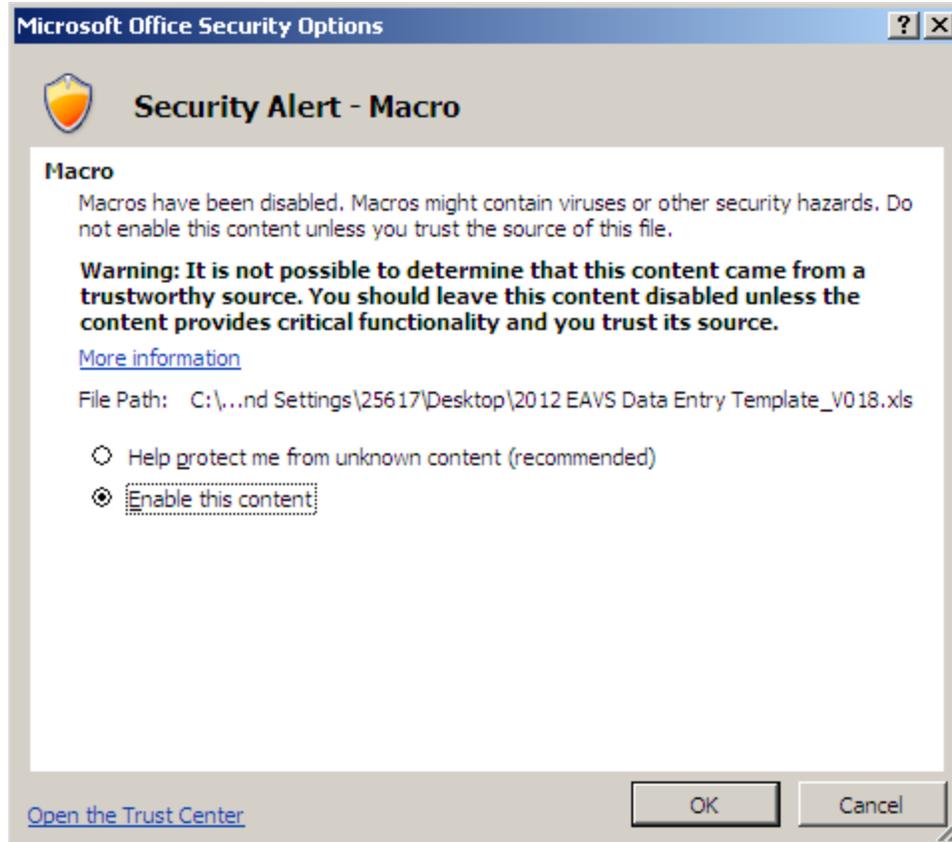
### Enabling Macros in Microsoft Excel 2007

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

**Step 1:** Click the “Options” button next to the “Security Warning” that appears below the Office ribbon.

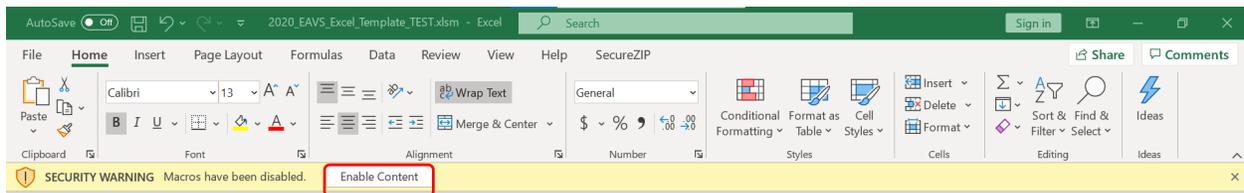


**Step 2:** In the pop-up box that appears, click “Enable this content” and click on “OK.”



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

If you are using Microsoft Excel 2010 or 2013 or Office 365, then 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 enabled, you are ready to begin entering your data for the 2020 EAVS. You may need to re-enable macros each time you open the template file.

### Navigating in the Excel Template

When you open the 2020 EAVS Excel template for the first time, you will see several worksheets within the file:

- **DataTab:** This is the worksheet in which 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, 2, 11–12, 22, 26, 30, and 33 of the [2020 EAVS Questionnaire](#). Additional instructions that are specific to each question can be found in the DataTab.
- **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 [Error Checking in the Excel Template](#) for more details.

The error-checking functionality will generate additional tabs with error reports every time the Error Check button is clicked. See the section [Error Checking in the Excel Template](#) for more details. To avoid interfering with the error checking functionality, do not delete tabs from or add additional tabs to the template.

Because of the number of columns and rows in the template, you will need to scroll left/right and up/down to view all the items in the DataTab worksheet. It is recommended that you freeze the panes in this worksheet on cell **C10** 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. You should not add or delete columns from the DataTab worksheet. However, you may hide and unhide rows and columns in this worksheet without affecting the error-checking functionality.

The DataTab worksheet contains the following features:

- **Pre-filled list of jurisdictions:** The Excel template lists all the jurisdictions in your state or territory for which the EAC needs data. Column A of the worksheet has the FIPS code (or another numeric identifier) for the jurisdiction and Column B has the jurisdiction's name. If you find a mistake in the jurisdiction list in your state's template, then [contact the EAVS project team](#) before you begin your data entry. Please do not manually change any jurisdiction names or FIPS codes to avoid interfering with the error-checking functionality.
- **Question instructions:** Located in Rows 4–9, which are shaded in blue. Row 4 contains the question title, row 5 contains the item description, row 6 contains instructions on what type of answer is expected (e.g., number, text description, pull-down menu), row 7 contains question instructions, and row 8 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 5, 7, and 8 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 of the cell.
- **Variable names:** Located in row 9. This row is shaded in 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 you ensure your subtotals are adding up correctly; these columns are shaded in grey. For instance, Column AH 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–A3j for each jurisdiction and place that total in Column AH. That number can be compared to A3a in Column U. These Total Check columns are not part of the official EAVS data submission and will be deleted from the data when it is publicly released. When copying and pasting data into the Excel template, take care to work around these Total Check columns.
- **Comments:** Most questions will allow you to elaborate on your answers with comments. For instance, Column P 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 are complete and accurate. See the [Error Checking in the Excel Template](#) section of this user guide for more information.

Local Jurisdiction Identification		Jurisdiction Information								Registered and Eligible Voters in Jurisdiction					
Error Check										Registered Eligible Voters Total	Registered Eligible Voters Active Voters	Registered Eligible Voters Inactive Voters	Registered Eligible Voters Comments		
-99 = Data Not Available										Error Number or Does Not Apply or Data Not Available	Error Number or Does Not Apply or Data Not Available	Error Number or Does Not Apply or Data Not Available	Optional		
-88 = Does Not Apply										Survey Question Instructions for A1					
										Using Does Not Apply, Data Not Available, or Zero for A1					
FIPS Code	Jurisdiction Name	Name	Title	Office / Agency	Address1	Address2	City	State	Zip	Email	Telephone	A1a	A1b	A1c	A1Comments
000000001	ADAMS COUNTY							TEST							
000000002	ALLEN COUNTY							TEST							
000000003	ANDERSON CITY							TEST							
000000004	BAKER COUNTY							TEST							
000000005	BOONE COUNTY							TEST							

## 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, or just small portions of data. Content that you paste into the worksheet will lose any of its prior formatting once the error checks are 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 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 has previously been entered. See the [How to Copy and Paste Data](#) 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. Some questions use pull-down menus with pre-filled options. You will not be able to type information into columns with pull-down menus, but you will be able to copy and paste into them. Row 6 of the Excel template has details on what type of response is expected for the EAVS item.

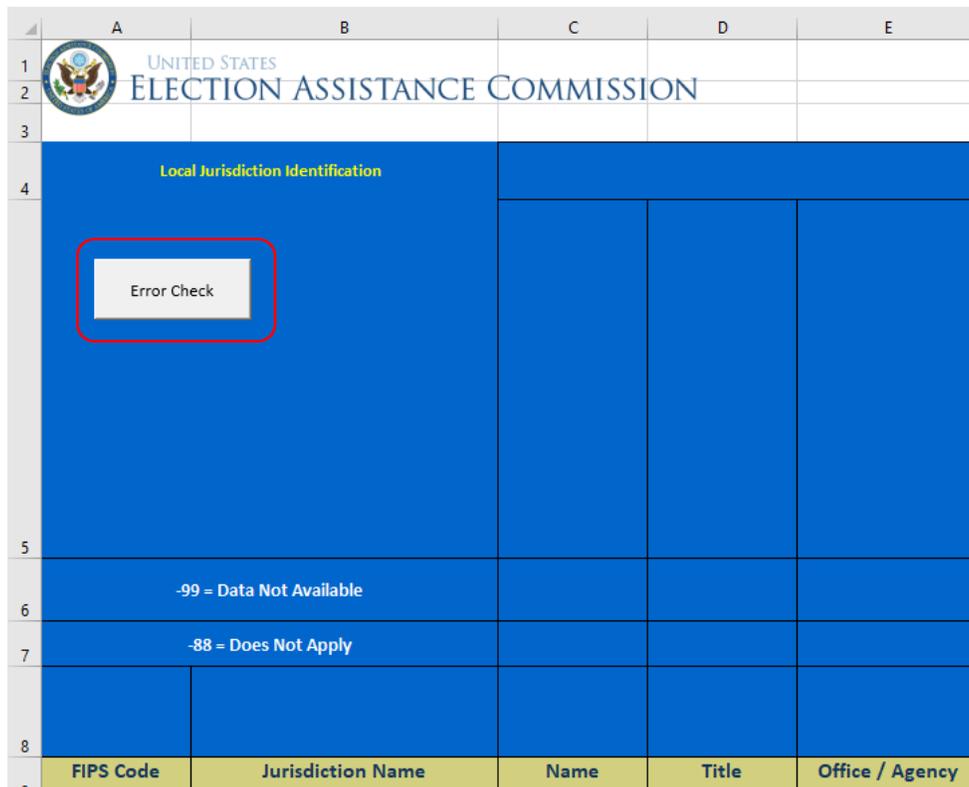


Please attempt to record data according to the categories as they are defined in the question. If your jurisdiction uses a different data classification scheme (e.g., your jurisdiction collects data in such a way that combines two or more categories listed in a question), then you can use the space provided for “Other” to provide numbers and details 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. Except for question comments and “Other” items, all items in EAVS require a response. Mandatory items can be identified for having the item description and answer instructions (rows 5 and 6) shaded in dark blue. 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 2020 Excel template has a built-in error-checking procedure that allows 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. 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 this 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 generate two additional tabs. The



RawErrorCodes worksheet contains a list of all errors; because this list is not organized or formatted, we do not recommend consulting this tab. Instead, use the tab that is labeled with your state’s postal abbreviation, which contains a full error report with tables, organized by jurisdictions, that list the FIPS code and jurisdiction name, the variable causing the error, a description of the error, and the cell that the error appears in.

FIPS Code	Jurisdiction Name	Variable	Error	Cell
000000001	ADAMS COUNTY	A1a	The sum of active (A1b) and inactive (A1c) registered voters should be equal to the total number of registered voters (A1a).	M10
000000001	ADAMS COUNTY	A1c	Because your state does not differentiate between active and inactive voters, then A1a should equal A1b. Please correct your responses or use the comments section to explain why those two items differ.	O10
000000001	ADAMS COUNTY	A1c	Because your state reported differentiating between active and inactive voters in Q11 of the Policy Survey, you may not respond Does Not Apply to A1b and A1c. Instead, please report the number of active and inactive voters in these items, or, if that data is not tracked, respond Data Not Available. If the Policy Survey response is incorrect, please contact your state POC and the EAVS technical assistance team.	O10
000000001	ADAMS COUNTY	A2a	Because your state reported having a form of same-day registration in Q9 of the Policy Survey, you may not respond Does Not Apply to A2a. Instead, please report the total number of same day registrations received, or, if that data is not tracked, respond Data Not Available. If the Policy Survey response is incorrect, please contact your state POC and the EAVS technical assistance team.	Q10
000000001	ADAMS COUNTY	A3a	The sum of the numbers you report in A4a-I should equal the total number of registration forms you reported in A3a.	U10

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

- **Sum validations:** These validations will highlight when subcategories do not sum to the expected total.
  - Example: The total number of voters participating in the 2020 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 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, then 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 green. In the example above, the cell corresponding to C1b would appear highlighted in green 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 the issue is located (e.g., C3a and C1b in the example above).
- **Policy Survey validations:** These validations will appear when an EAVS item conflicts with the state’s Policy Survey data submission.
  - Example: If a state has an online voter registration system (i.e., responds "Yes" to Q7 of the Policy Survey), then no jurisdiction from that state should respond “Does not apply” to online registrations in items A4c, A5c, A6c or A7c.



- Color code—**Yellow**: When a reported EAVS value conflicts with the state’s Policy Survey submission, the cells will be highlighted in yellow. In the example above, the cells corresponding to A4c, A5c, A6c, and A7c would appear highlighted in yellow in the spreadsheet if a “Does not apply” is entered. If the EAVS data are correct and the Policy Survey data are incorrect, then [contact the EAVS project team](#).
- **Missing data validations**: Except for 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 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 does not track data for an item), or zero (if no instance of an item occurred).
  - Color code—**Light blue**: When a required EAVS item is left blank, the cell(s) will be highlighted in light blue. In the example above, the cells corresponding to A1b and A1c would appear highlighted in light blue in the spreadsheet.

The error checks 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 checks will take to complete. Do not interrupt Excel or close the program while error checks are in progress.

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 boxes appended to each question to explain. This will help the EAVS project team assess and report your data accurately. Any errors that were not corrected or explained in comment 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 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 DataTab worksheet; 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.

	A	B	M	N	O
9	FIPS Code	Jurisdiction Name	A1a	A1b	A1c
10	0000000001	ADAMS COUNTY	23646	22169	1477
11	0000000002	ALLEN COUNTY	78223	73640	4583
12	0000000003	ANDERSON CITY	106682	94319	12363
13	0000000004	BAKER COUNTY	10398	9977	421
14	0000000005	BOONE COUNTY	9344	9002	342
15	0000000006	BROWN COUNTY	21180	20196	984
16	0000000007	BUTLER COUNTY	10940	10514	426
17	0000000008	CALDWELL COUNTY	170578	150846	19732
18	0000000009	CARROLL COUNTY	48732	46972	1760
19	0000000010	CLAY COUNTY	3205	3058	147
20	0000000011	CUMBERLAND COUNTY	56876	54378	2498
21	0000000012	DALLAS COUNTY	4550	4244	306
22					
23	STATE TOTAL		544354	499315	45039
24					



Note that the Excel template may auto-populate some items with a “VALID SKIP” code after performing an error check. This automatically generated data code is an indication of items that are skipped based on responses to related survey items. This special code is built into the programming of the Excel template and should not be manually entered anywhere else.

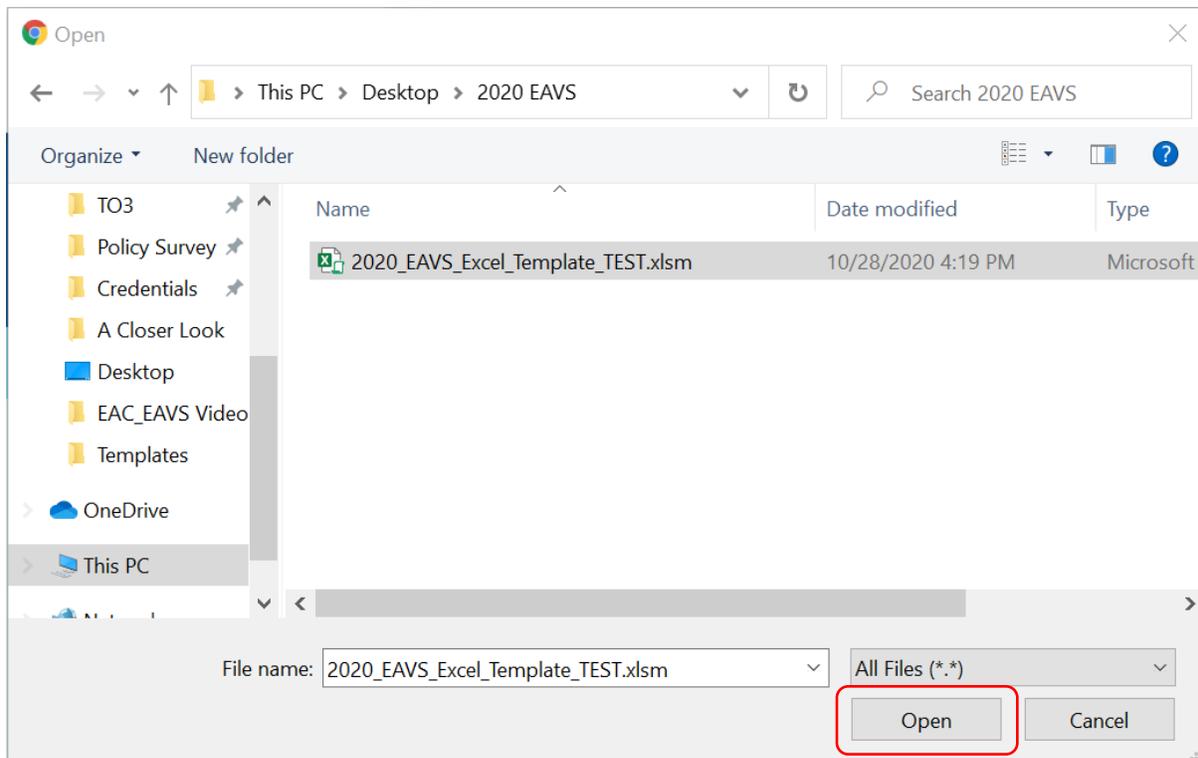
### Submitting Data Using the Excel Template

Once you have completed your EAVS data entry and have error checked your data and addressed as many errors as possible, 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 that all of 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.”

The screenshot shows the 'Test Files' section of the EAVS Portal. At the top, there is a navigation bar with the United States Election Assistance Commission logo, the text '2020 Election Administration and Voting Survey', and the FORSMARSH GROUP logo. Below the navigation bar are links for HOME, DOWNLOADS, LINKS, RESOURCES, and STATE FILES, along with a user greeting 'Welcome EAVS\_TEST!' and a 'LOG OFF' button. The main content area is titled 'Test Files' and contains a 'File Upload' section. In this section, there is a 'File Path' label, a text input field with a 'Choose File' button and the text 'No file chosen', and an 'Upload File' button. Below the upload section is a 'Downloads' section with a list of files: 2016\_EAVS\_Final\_TEST.xlsm, 2016\_Statutory\_Overview\_TEST.pdf, 2018\_EAVS\_Final\_TEST.xlsm, and 2018\_Policy\_Survey\_TEST.pdf.

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



Verify that the correct file path is listed in the textbox next to the “Choose File” button, and then click the red “Upload File” button. Once your file has been successfully uploaded, a message reading “File upload successful” will appear under the File Upload header and the file will appear in your “Uploaded Files” table with the date and time you submitted it.

### Test Files

#### File Upload

File upload successful.

File Path  No file chosen

Upload File

#### Downloads

- 2016\_EAVS\_Final\_TEST.xlsx
- 2016\_Statutory\_Overview\_TEST.pdf
- 2018\_EAVS\_Final\_TEST.xlsx
- 2018\_Policy\_Survey\_TEST.pdf
- 2020\_EAVS\_Excel\_Template\_TEST.xlsx
- 2020\_Online\_Template\_Passwords\_TEST.docx
- 2020\_Policy\_Survey\_TEST.pdf

#### Uploaded Files

File Name	Date & Time (Eastern Time)
2020_EAVS_Excel_Template_TEST.xlsx	10/28/2020 4:23:47 PM

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 (MB) in size. If your file is larger than this, [contact the EAVS project 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 EAVS project team.
- **Upload was interrupted:** This 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 the upload again.

### Submitting Final, Certified State Data using the Excel Template

After a state submits its draft EAVS data by February 1, 2021, the EAVS project team will review the submission and send a written memorandum to the state POCs summarizing items in the data that need further review before the state's submission can be certified as final. When the memo is sent, the project team will also send an Excel file that contains the state's initial data submission. This Excel file will have added functionality to assist the state in finalizing its submission, and the state POCs should use this file to create the state's final, certified EAVS submission. Further instructions on how to use this Excel file will be sent with the data review memo.



## The Online Template

### Passwords 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 jurisdictions to submit part or all of the state's EAVS data submission, or 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 point of contact (POC).

Each EAVS jurisdiction (typically a county or municipality, in most states) has been assigned a unique password. Should the state EAVS POC wish to use the online template to collect data from jurisdictions, the state POC will be responsible for distributing passwords to jurisdiction officials. A list of assigned passwords can be downloaded from the EAVS Portal. After logging into the site using the Portal credentials for your state, click on the link for the file titled "2020\_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, please contact the project team.

### Getting Started with the Online Template

Jurisdiction officials who have been asked to complete the online template can find it at the Links section of the EAVS Portal (<https://eavsportal.com/Home/Links>) or at <https://www.survey.eavsportal.com>. To log in, 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 POC 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, please contact your state's EAVS POC.

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.



**U.S. ELECTION ASSISTANCE COMMISSION (EAC)**  
**2020 Election Administration and Voting Survey (EAVS)**

The ongoing process of improving America’s election systems relies in part on having accurate data about the way Americans cast their ballots. In 2002, Congress chartered the U.S. Election Assistance Commission (EAC) to collect information on the state of American elections and make it widely available to policymakers, advocates, scholars, journalists and the general public. Since 2004, the Commission has sponsored a biennial survey as its primary tool for fulfilling that mission. We are pleased to present the 2020 Election Administration and Voting Survey (EAVS), and we ask for your help in making it the most complete and accurate survey in its history. The questions below ask for information about ballots cast, voter registration, overseas and military voting, Election Day activities, voting technology, and other important issues.

The section concerning the Uniformed and Overseas Citizens Voting Act (UOCAVA) serves as the EAC’s standardized format for state reporting of UOCAVA voting information as required by 42 U.S.C. §1973ff-1. States that complete and timely submit this section to the EAC will fulfill their UOCAVA reporting requirement under 42 U.S.C. §1973ff-1(c).

Additionally, EAC is mandated by the National Voter Registration Act (NVRA) to collect information from states concerning the impact of that statute on the administration of federal elections. With this information, EAC is required to make a report to Congress and provide recommendations for the improvement of federal and state procedures, forms, and other NVRA matters. States that respond in a timely manner to all questions in this survey concerning voter registration-related matters will meet their NVRA reporting requirements under 42 U.S.C. § 1973gg-7 and EAC regulations.

The EAC recognizes the burden that asking for these data places on state and local election officials, and we have worked to minimize that burden as much as possible. In advance, we thank you for your cooperation and look forward to answering any questions you might have.

**Please enter your password:**

**Continue >>**

## 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 (name, title, office/agency name, address, email, telephone number, and fax number) of the person responsible for completing 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 “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 the sections in order.



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

- Instructions and Contact Information**
- Section A: Voter Registration
- Section B: Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA)
- Section C: Domestic Civilian By-Mail Voting
- Section D: In-Person Voting and Polling Operations
- Section E: Provisional Ballots
- Section F: Voter Participation and Election Technologies
- Submit Data**

[Continue >>](#)

OMB Control No. 3265-0006 Expiration Date 3/31/2023

Please note that 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, contact your state’s EAVS POC.

When you first enter a section of the EAVS, you will see the menu for that section. This section menu 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 enter data for. 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 D: In-Person Voting and Polling Operations**

The goal of Section D is to understand in-person voting and election administration in your jurisdiction.

This section of the EAVS asks for four types of data:

1. How many people voted in person—either on Election Day or during in-person early voting (including in-person absentee voting)—in 2020?
2. How many precincts did you have in your jurisdiction for the 2020 general election?
3. How many polling places—for Election Day voting and in-person early voting—did your jurisdiction have for the 2020 general election?
4. How many poll workers—for Election Day voting and in-person early voting—did your jurisdiction have for the 2020 general election, and other data related to poll workers.

**Answering All Questions**

**Please provide an answer to all of the items in Section D.**

- If the question is not applicable to your state/jurisdiction—for example, if your state does not have any form of in-person early voting—please select “Does not apply” as the response to question D2b.
- If the question is applicable to your state but your jurisdiction does not have the data necessary to answer the question—for example, if your state does have in-person early voting but your jurisdiction does not track those data—please select “Data Not Available” as the response to the question.

Select the questions you would like to go to:

- D1: Total in-person voting
- D2-D4: Precincts and polling places
- D5-D8: Poll Workers

[Save and Continue >>](#)

OMB Control No. 3265-0006 Expiration Date 3/31/2023



When you are viewing a survey question, there will be four ways to navigate through the survey. Above the questions will be 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 questions on the page will be a “Back” 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 advance you to the next screen in the survey. This “Save and Continue” button will also run error checks on the questions on the current page (see the section [Error Checking in the Online Template](#) for more detail). Please note that the “Back to Section Menu,” “Back to Main Menu,” and “Back” buttons do not save any data. If you wish to save your data before proceeding in the survey, or wish to exit the survey, please ensure you have clicked “Save and Continue” to protect against data loss. Please do not use your browser’s “Back” button to navigate through the survey, as that may cause errors or data loss.

Back to Section D Menu >>  
Back to Main Menu >>

**Total In-Person Voting: Question D1**

**D1. Total In-Person Voting**

For question D1, report the total number of people in your jurisdiction who voted either at a physical polling location on Election Day or voted at a physical polling location prior to the November 2020 general election.

	[?]	Data not available[?]	Does not Apply[?]
<b>D1a. Voted at a physical polling place on Election Day:</b> This category includes all individuals who cast a ballot at a physical location on Election Day, regardless of whether their ballots were ultimately counted or rejected (not including provisional ballots or absentee ballots dropped off at the polls).	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>D1b. Voted at an early vote location:</b> This category includes all individuals who cast a ballot at a physical location before Election Day, regardless of whether their ballots were ultimately counted or rejected.	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

**D1 Comments:**

<< Back
Save and Continue >>

OMB Control No. 3265-0006
Expiration Date 3/31/2023

When you finish a section of the survey, you will be directed back to the section menu and will need to click the orange “Back to Main Menu” button to return to the survey’s main menu. From the survey main menu, you can select another section to complete. The survey main menu and the section menus will note which sections of the survey and which questions you have viewed. Please note that the percentage reviewed next to each section on the main menu reflects the number of items per section you have viewed. It does not indicate the number of items completed.



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

- Instructions and Contact Information
- Section A: Voter Registration - 100% Reviewed!
- Section B: Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA) - 28% Reviewed!
- Section C: Domestic Civilian By-Mail Voting
- Section D: In-Person Voting and Polling Operations
- Section E: Provisional Ballots - 50% Reviewed!
- Section F: Voter Participation and Election Technologies - 40% Reviewed!
- Submit Data

**Continue >>**

OMB Control No. 3265-0006 Expiration Date 3/31/2023

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 re-enter the survey, you will be taken to the main menu.

## 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. Many questions will also have the option to select a checkbox for “Data not available” and, where appropriate, a checkbox for “Does not apply.” In addition, each question in 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 2020 general election. If your jurisdiction differentiates 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 differentiation, report your total number of registered voters again in A1b and select "Does not apply" as the response to A1c. The sum of active voters in A1b and inactive voters in A1c should equal the total number of registered voters reported in A1a.

		Data not available <sup>[?]</sup>	Does not apply <sup>[?]</sup>
<b>A1a. TOTAL number of registered and eligible voters:</b> Do not include any persons under the age of 18 who may be registered under a “pre-registration” program or registered after the 2020 deadline for registration.	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>A1b. TOTAL number of active voters:</b> <sup>[?]</sup> Fully eligible voters who have no additional processing requirements to fulfill before voting.	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>A1c. TOTAL number of inactive voters:</b> <sup>[?]</sup> Voters who remain eligible to vote but require address verification under the provisions of the National Voter Registration Act.	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

**A1 Comments:**

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



**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 2020 general election? Please check one option.

- Very difficult
- Somewhat difficult
- Neither difficult nor easy
- Somewhat easy
- Very easy
- Not enough information to answer

**F12. Location for Where Votes are Talled**

For each of the following uses of your jurisdiction's voting equipment, report where the votes are tallied.

Location of vote tally for:

[?]

F12a. In-precinct Election Day regular ballot voting	<input type="text"/>	Select an answer...
F12b. Special devices accessible to voters with a disability	<input type="text"/>	Select an answer...
F12c. Provisional ballot voting	<input type="text"/>	Central location
F12d. In-person early voting	<input type="text"/>	Precinct or polling location
F12e. By-mail balloting	<input type="text"/>	Both central and precinct location
		Does not apply
		Data not available
		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 space provided for “Other” to provide numbers and details on these categories. If you report information in the “Other” field, please use the text box in the answer to provide an explanation for the category.

**E1. Total Provisional Ballots Submitted and Adjudication**

For question E1a, report the total number of voters who submitted provisional ballots in the November 2020 general election. Next, for questions E1b-E1e, divide the total number of voters who submitted provisional ballots (as reported in E1a) into the categories listed below.

	[?]	Data not available[?]	Does not apply[?]
<b>E1a. TOTAL number of voters who submitted provisional ballots:</b> The number of voters who submitted provisional ballots, regardless of whether or not the provisional ballot was ultimately counted in part or full. States that are exempt from the provisional ballot requirements of HAVA and do not offer provisional ballots should report Does Not Apply.	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>E1b. Provisional ballots counted in full</b>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>E1c. Provisional ballots counted in part</b> (e.g., only the items on the ballot for which the voter would have been eligible had he or she voted in the correct precinct)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>E1d. Provisional ballots rejected</b>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>E1e. Other:[?]</b> <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>



Items should not be left blank. Except for question comments and “Other” items, all items in EAVS require a response. Please 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 on when to use these responses. These instructions can be accessed by hovering your mouse over any blue question mark you see 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 2020 general election.

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

Provide any comments about the nuances of how your jurisdiction categorizes registered UOCAVA voters in the B1 Comments box.

	[?]	Data not available[?]
<b>B1a. TOTAL registered and eligible:</b> Report the total number of registered and eligible voters covered under UOCAVA for the November 2020 general election. Include active and inactive voters and any persons who might have registered as UOCAVA prior to or on Election Day.[?]	<input type="text"/>	<input type="checkbox"/>
If the total number of registered and eligible voters who were covered under UOCAVA in your jurisdiction is zero, report zero for B1a and please enter to C1 in Section C.		
<b>B1b. Uniformed Services voters:[?]</b> Members of the Uniformed Services and their eligible dependents—domestic or foreign	<input type="text"/>	<input type="checkbox"/>
<b>B1c. Non-military/civilian overseas voters</b>	<input type="text"/>	<input type="checkbox"/>

If you are unable to distinguish between different UOCAVA voter types, then complete B1a with a numerical response and enter Data Not Available for B1b and B1c.

Please note 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, please use the “Tab” key to navigate between active fields in the survey.

## 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 2020 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 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.



- **Policy Survey validations:** These validations will appear when an EAVS item conflicts with the state’s Policy Survey data submission.
  - Example: If a state has online voter registration system (i.e., responds "Yes" to Q7 of the Policy Survey), then no jurisdiction from that state should respond “Does not apply” to online registrations in items A4c, A5c, A6c or A7c.
- **Missing data validations:** Except for 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 voters in A1a but leaves the subitems for active and inactive registered voters blank, 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 does not track data for an item), or zero (if no instance of an item occurred).

Data validations will run on each page once you click “Save and Continue.” Error messages that have been triggered by the data validations will appear in red text on the page above the question grid.

**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 2020 general election.

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

Provide any comments about the nuances of how your jurisdiction categorizes registered UOCAVA voters in the B1 Comments box.

The amounts you report in B1b-c should equal the total number of registered and eligible UOCAVA voters you reported in B1a. Please correct your responses or use the comments section to explain why these subitems don't add up.

	[?]	Data not available[?]
<p><b>B1a. TOTAL registered and eligible:</b> Report the total number of registered and eligible voters covered under UOCAVA for the November 2020 general election. Include active and inactive voters and any persons who might have registered as UOCAVA prior to or on Election Day.[?]</p> <p>If the total number of registered and eligible voters who were covered by UOCAVA in the November 2020 general election in your jurisdiction is zero, report “0” for B1a and please skip to C1 in Section C.</p>	<input style="width: 50px;" type="text" value="200"/>	<input type="checkbox"/>
<p><b>B1b. Uniformed Services voters:[?]</b> Members of the Uniformed Services and their eligible dependents—domestic or foreign</p>	<input style="width: 50px;" type="text"/>	<input checked="" type="checkbox"/>
<p><b>B1c. Non-military/civilian overseas voters</b></p>	<input style="width: 50px;" type="text" value="0"/>	<input type="checkbox"/>

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 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 comment boxes will be flagged for further review after the data submission deadline.

The validation messages that appear are soft prompts and 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 error, then the prompt will disappear and will not show again until you return to the question and click “Save and Continue” at the bottom of the page.



## Submitting Data in the Online Template

Once all of your data have been entered, you have addressed as many errors as possible, and you are ready to submit, navigate to the survey main menu and select “Submit Data.”

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

- Instructions and Contact Information
- Section A: Voter Registration - 100% Reviewed!
- Section B: Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA) - 100% Reviewed!
- Section C: Domestic Civilian By-Mail Voting - 100% Reviewed!
- Section D: In-Person Voting and Polling Operations - 100% Reviewed!
- Section E: Provisional Ballots - 100% Reviewed!
- Section F: Voter Participation and Election Technologies - 100% Reviewed!
- Submit Data**

**Continue >>**

OMB Control No. 3265-0006 Expiration Date 3/31/2023

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. You may click on the orange “View Responses” button at the top of the page to view, download, or print a report of all the responses you have entered into the survey. If you wish to update any of your responses before submission, use the “Return to Survey Navigation” button to return to the survey main menu and navigate to the question(s) you wish to update. If you are ready to submit your data, first click the checkbox next to the statement, “I agree to lock my data submission,” and then click the “Submit Data” button.

**View Responses**

You will not be able to reopen the survey after clicking Submit. Please ensure that **all submitted answers are final**. If you have additional data to submit or need to edit any of your responses, click Return to Survey Navigation to return to the main menu.

I agree to lock my data submission

**<< Return to Survey Navigation**      **Submit Data**

OMB Control No. 3265-0006 Expiration Date 3/31/2023

Once a jurisdiction has submitted its data through the online template, the data will be made available to state POCs via a file that can be downloaded from the EAVS Portal (see the section [Transferring Data Between Templates](#) for more details).

If your data has been locked in the online template and you need to access the survey again, contact your state’s EAVS POC and the [EAVS project team](#).



## Submitting Final, Certified Data Using the Online Template

After a state submits its draft EAVS data by February 1, 2021, the EAVS project team will review the submission and send a written memorandum to the state POCs summarizing items in the data that need further review before the state's submission can be certified as final. When the memo is sent, the project team will also re-open the online templates of all the state's jurisdictions. State POCs should notify jurisdiction officials that the online surveys are 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 survey, and jurisdiction officials can make any necessary edits to their data. Once the data are ready to certify as final, the jurisdiction officials may use the process outlined above to submit their data (see the section [Submitting Data in the Online Template](#)).



## Transferring Data Between Templates

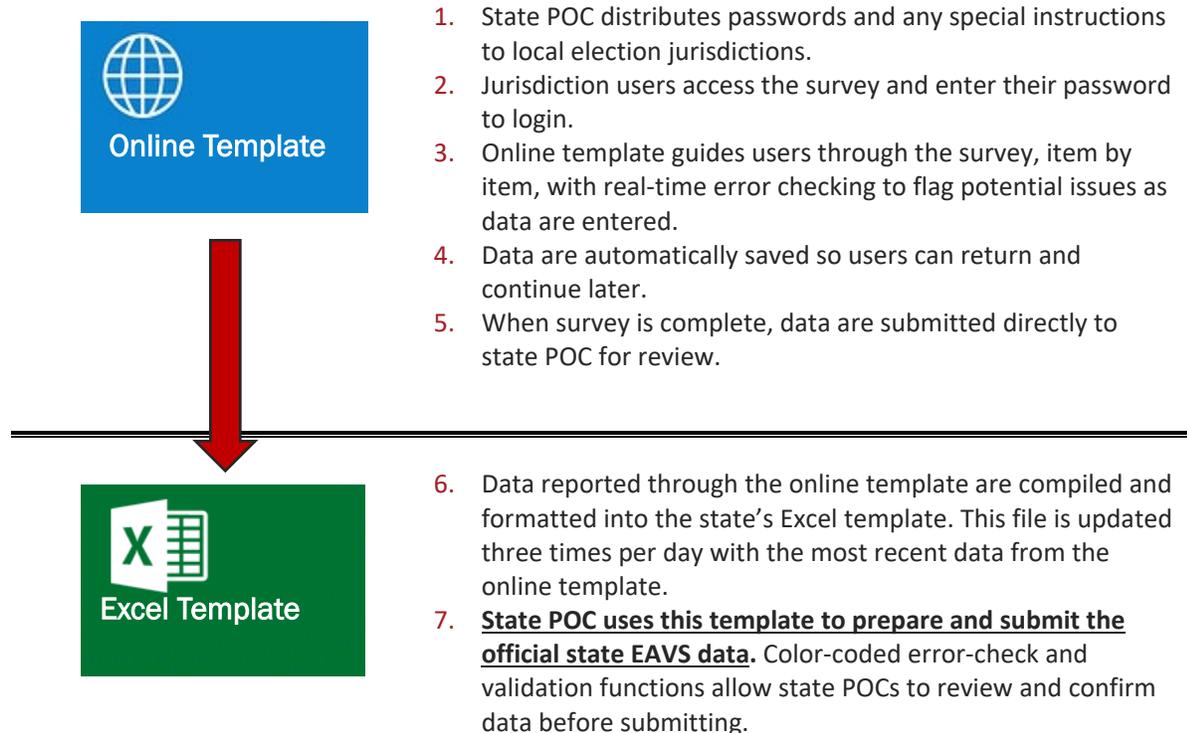
States may wish to use a combination of templates to compile their EAVS data. Scripts running in the background of the EAVS Portal will format the data submitted via the online template and transfer that data into a state’s Excel template for the state to review. Data submitted via the online template will be posted to the EAVS data portal every 8 hours. This section discusses how that process occurs.

### Coordinating Jurisdiction Data Collection using the Online Template

The online template can help state points of contact (POC) coordinate data collection with local jurisdictions. Each jurisdiction has a unique login credential to access the survey; these have been provided to state POCs through the EAVS Portal (see the section [Passwords for the Online Template](#) in this guide for more detail). 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 sections should contact the EAVS project team** to get this set up. These requests generally take 5–7 business days to fulfill.

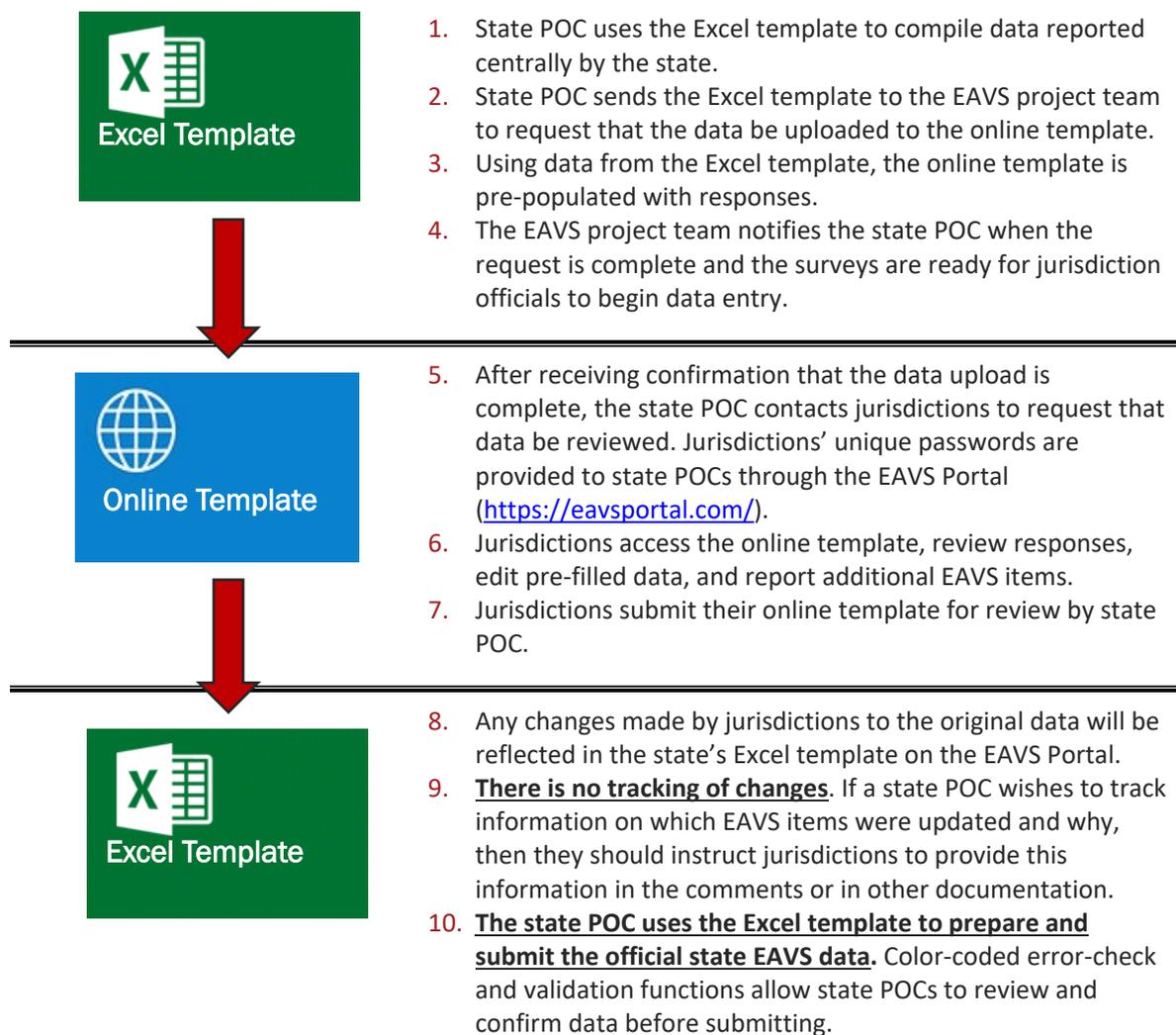
Data collected from jurisdictions using the online template will be exported to the Excel template through the following process:





## 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 who wish to pre-fill data into the online template should contact the project team. These requests will take 5–7 business days to fulfill.



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

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

The table titled "Online Survey Tracking Status" lists each jurisdiction within the state, the jurisdiction's status (Not Started, In Progress, or Complete), the percentage of EAVS questions the jurisdiction has completed in the online template, and a timestamp of when the jurisdiction last accessed the online template. State POCs can sort this information by any of the four column headers in the table. This table will refresh every 8 hours;



a timestamp below the table title lists the date and time of the last refresh. All timestamps in the tables are displayed in Eastern Time (ET). The table lists 15 jurisdictions at a time; additional jurisdictions can be viewed by clicking the “Next” button below the table.

### Online Survey Tracking Status

Last Updated: Monday, September 14, 2020 12:37:58 PM EST

Jurisdiction	Status	% Complete	Last Accessed (EST)
ACCOMACK COUNTY	In Progress	13%	2020-08-10 13:55:05
ALBEMARLE COUNTY	In Progress	20%	2020-08-17 14:08:38
ALEXANDRIA CITY	Not Started	0%	--
ALLEGHANY COUNTY	In Progress	22%	2020-08-17 14:15:47
AMELIA COUNTY	In Progress	17%	2020-08-19 12:25:07
AMHERST COUNTY	Not Started	0%	--
APPOMATTOX COUNTY	Not Started	0%	--
ARLINGTON COUNTY	Not Started	0%	--
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%	--

Showing 1 to 15 of 133 entries

[Previous](#)
1
2
3
4
5
...
9
[Next](#)



## Requesting Further Assistance with the Data Collection Templates

If you have questions about submitting your data that are not answered in this guide, or experience technical issues with the data collection templates, please reach out to the EAVS project team by email ([eavs@forsmarshgroup.com](mailto:eavs@forsmarshgroup.com)) or by telephone. The telephone number for the EAVS project team will be available to state POCs behind their login credentials on the EAVS Portal.

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



## Appendix

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

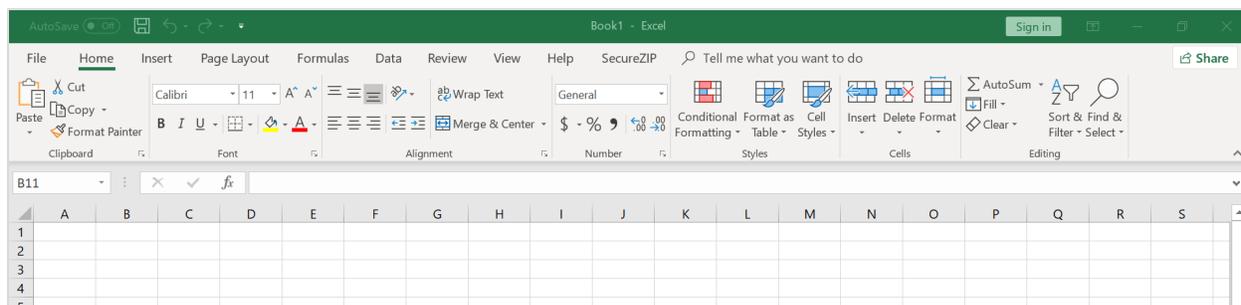
- How to identify which version of Excel you have
- How to save Excel files
- Components of an Excel workbook
- Freezing panes in Excel
- How to copy and paste data in Excel

### Which Version of Microsoft Excel Do I Have?

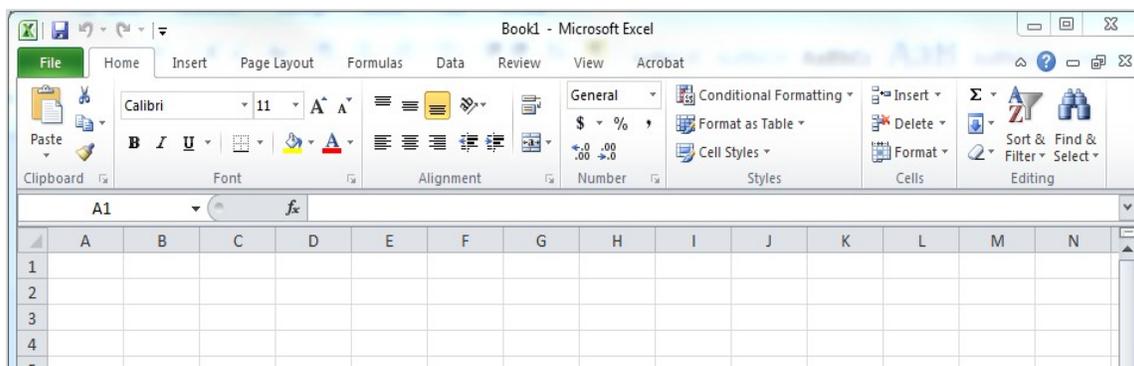
You may find it helpful to know which version of Excel you are working in, as some features of the program have changed over the years. The process for saving a file, for example, differs slightly between Excel 97–2003 and Excel 2007, 2010, or 2013, and Office 365.

To determine which version of Excel you have, first open either the 2020 EAVS Excel template or a blank Excel workbook.

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

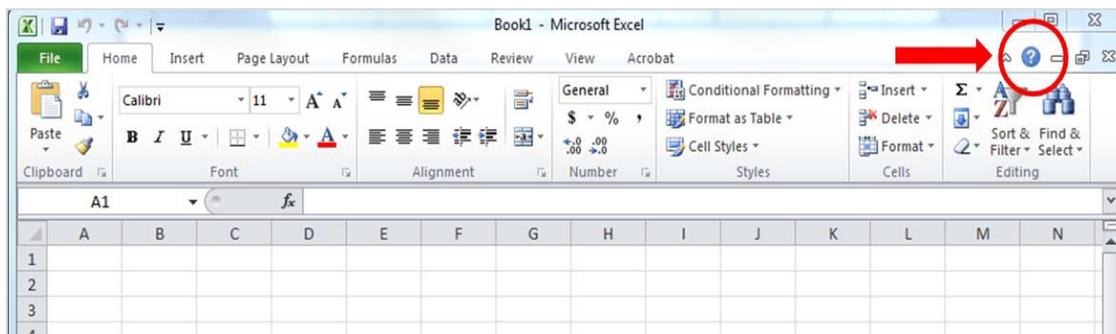


If you are using Excel 2007, 2010, or 2013, then the Excel menu will look similar to the image below:

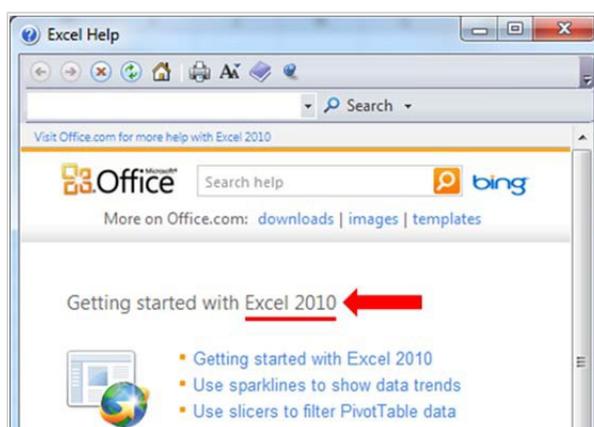




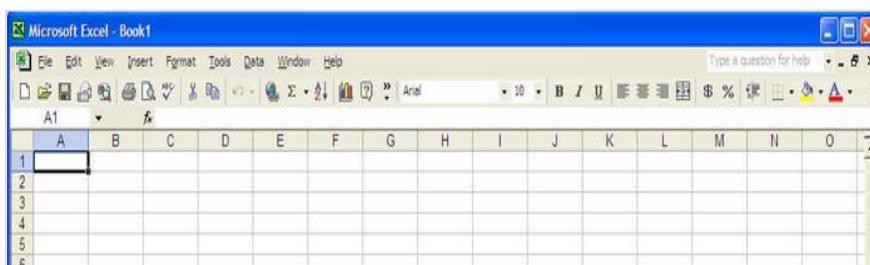
To distinguish between Excel 2007 and Excel 2010, click on the “?” icon (blue in 2007 and 2010) in the upper-right corner.



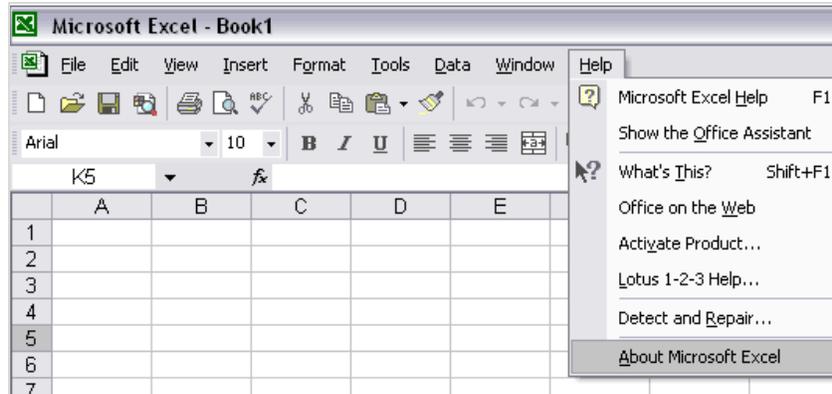
A box will pop up indicating the version of Excel you are working in.



If you are using an early version of Excel (Excel 97–2003), then 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.

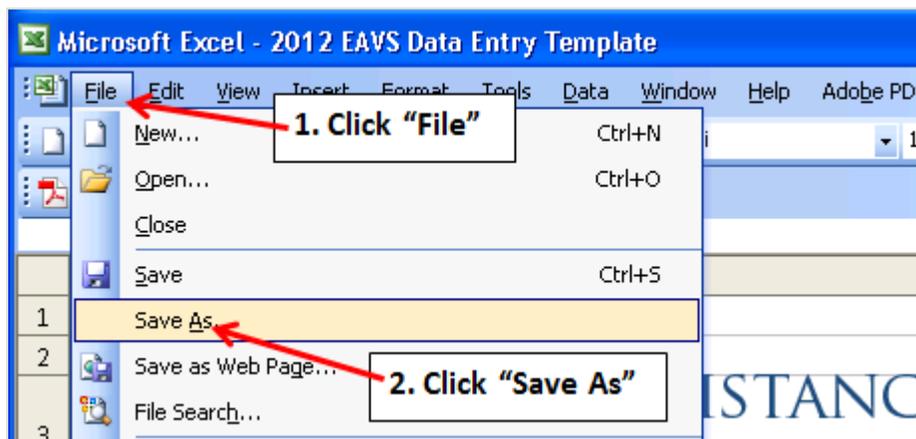


## Saving a File in Excel

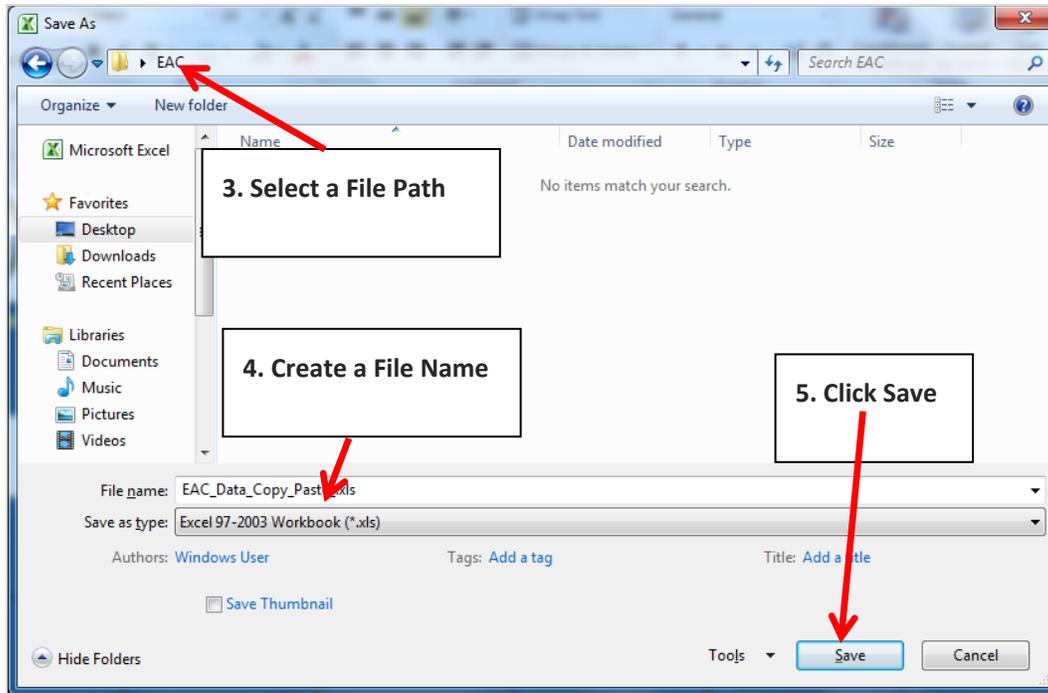
Once you begin working in the Excel template, you will need to save your work. The first time you save, you will need to save the file to your computer by using “Save As” to specify a file name and file path; however, any time after that, you can save the file by simply selecting “Save.”

### Saving in Excel 97–2003

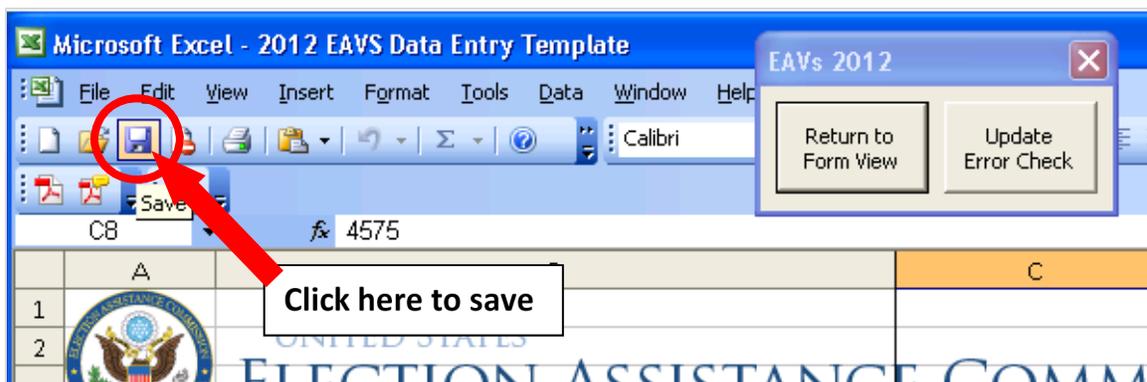
If you are using any version of Excel between Excel 97 and Excel 2003, to save the file (also known as an Excel “workbook”) for the first time, click on “File” and select “Save As.”



You will then need to specify a file path (i.e., the location on your computer) to which to save the workbook. You will 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.



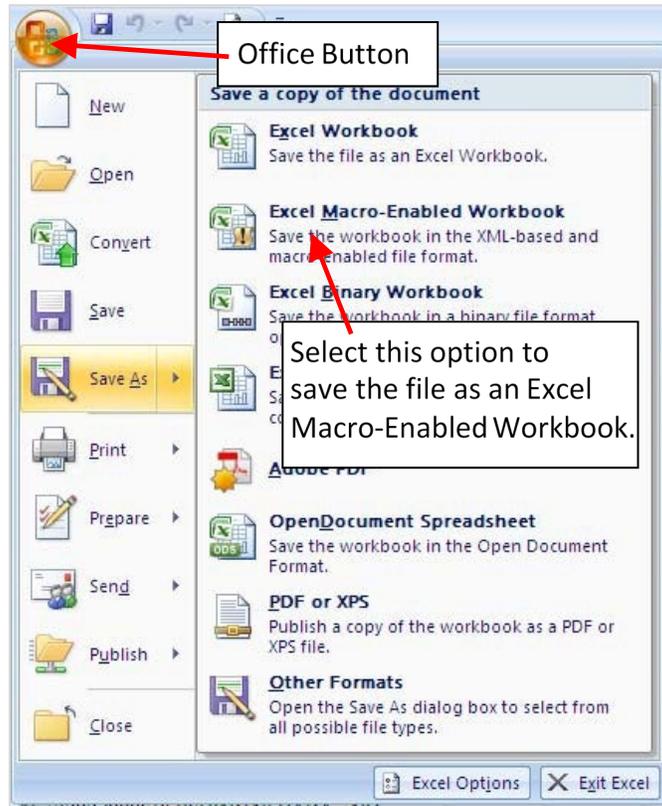
### Saving in Excel 2007, 2010, or 2013

Saving a workbook in Excel 2007, 2010, or 2013 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 preserve the error-checking functions that have been built into the file. 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

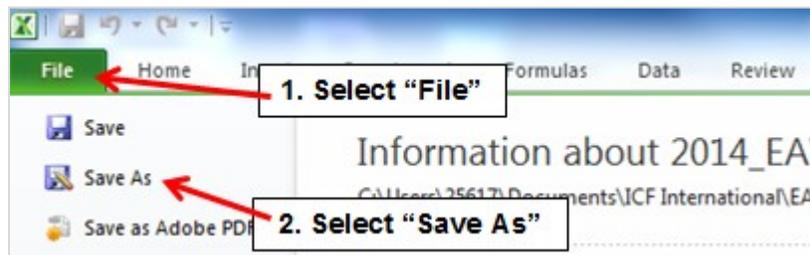


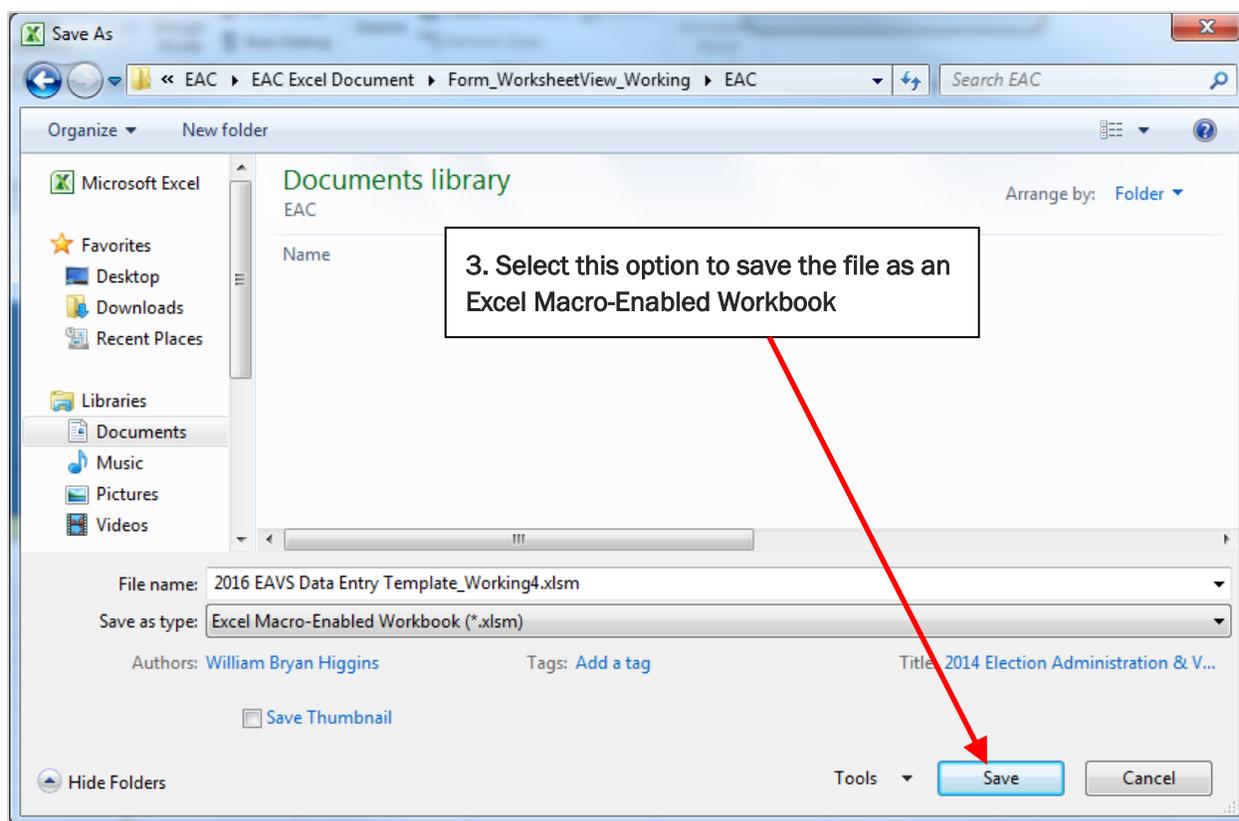
right. You will then need to create a name for the workbook and select the file path to which you will save the workbook.



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.

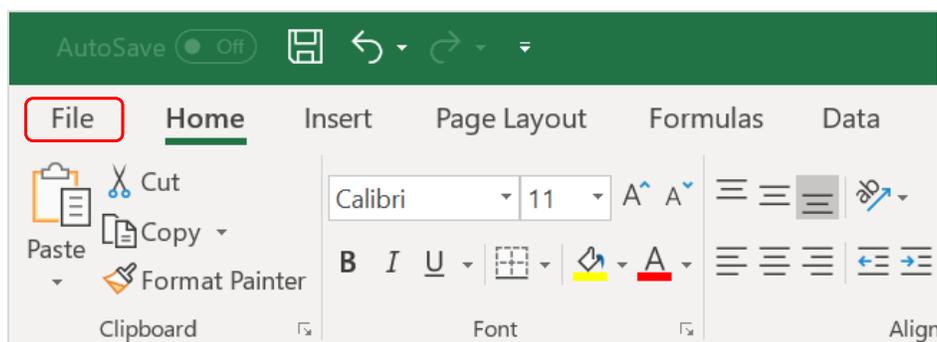




Just as in Excel 97–2003, in Excel 2007, 2010, or 2013, once you have saved the file using the “Save As” option, you will subsequently only need to use the “Save” function to save your work. You can save your work by selecting the “Save” icon in the Excel menu bar or by pushing the “Ctrl” and “S” buttons on your keyboard at the same time.

### Saving in Office 365

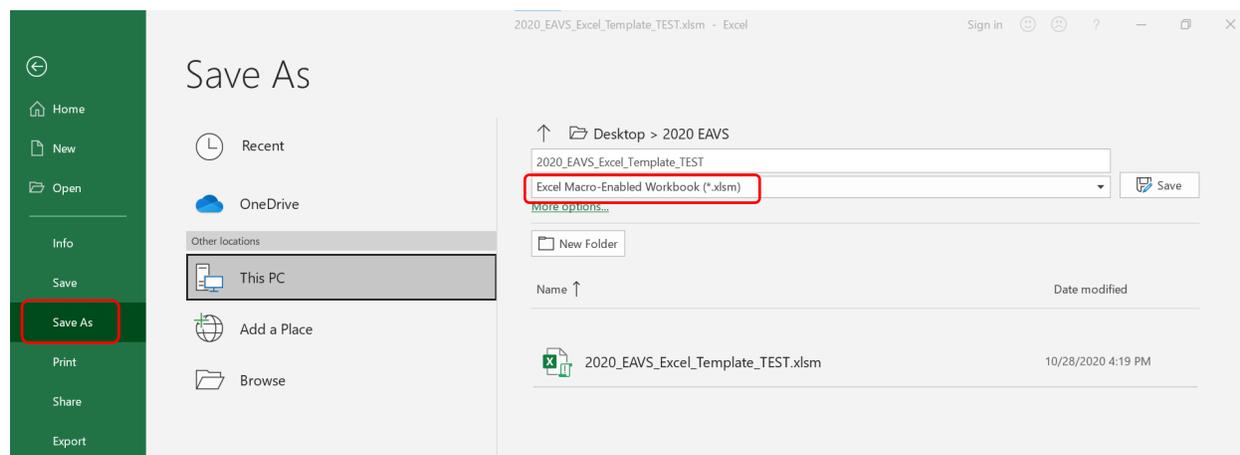
In Office 365, begin by clicking the “File” menu in the top-left corner.



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. You must save



the file as an Excel Macro-Enabled Workbook (\*.xlm) to keep the error-checking functionality that has been built into the file. 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 Excel 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 Excel 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.

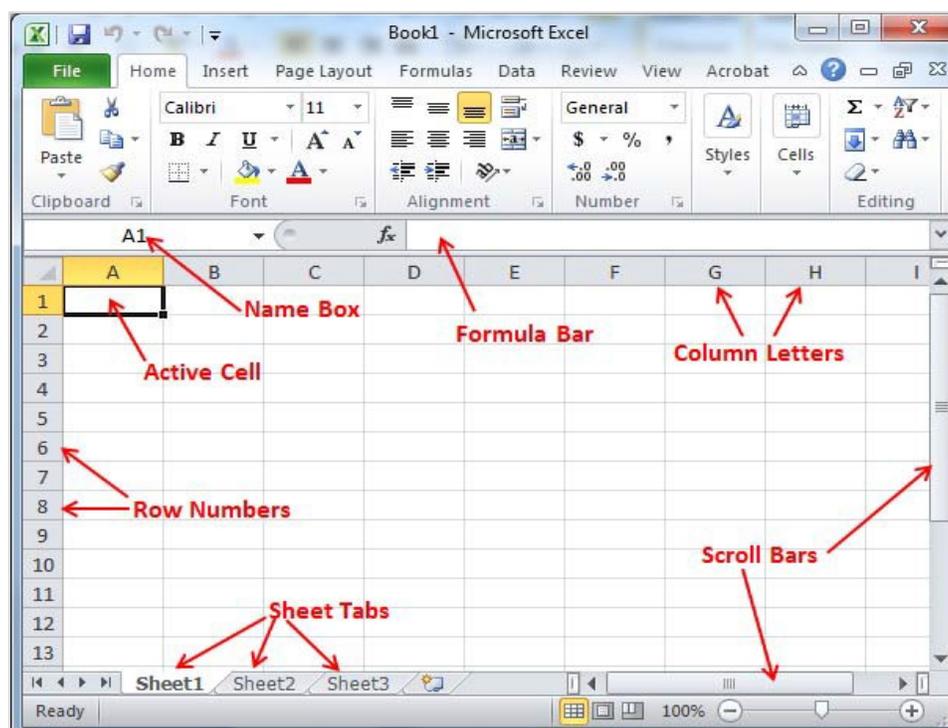
However, you will be required to enter data (numbers, and in some cases, text) into the worksheets. To perform these tasks, you will use these features in Excel:

- **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.



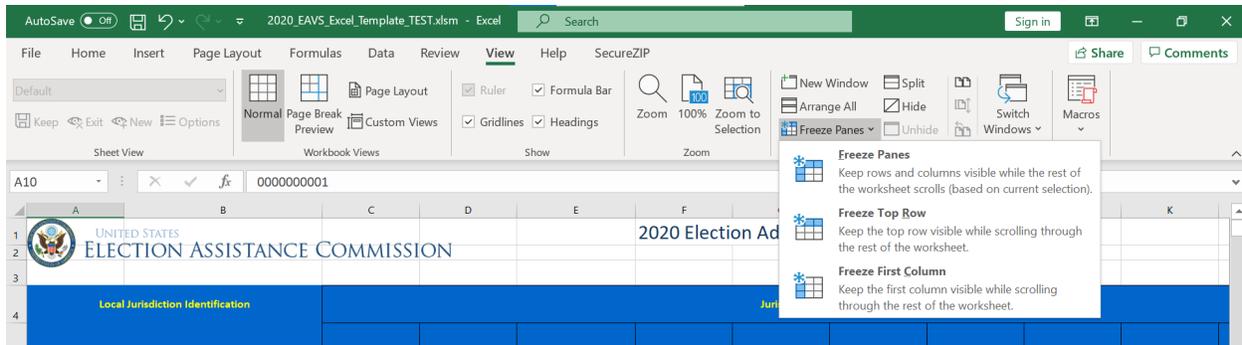
- **Columns and Rows:** Columns run vertically and are designated by letters; rows run horizontally and are designated by numbers. The intersection of column letters and row numbers creates a cell reference (e.g., A1).
- **Name Box:** The name box displays the cell reference (e.g., A1) of the active 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 2020 EAVS Excel 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.



## Freezing Panes in Excel

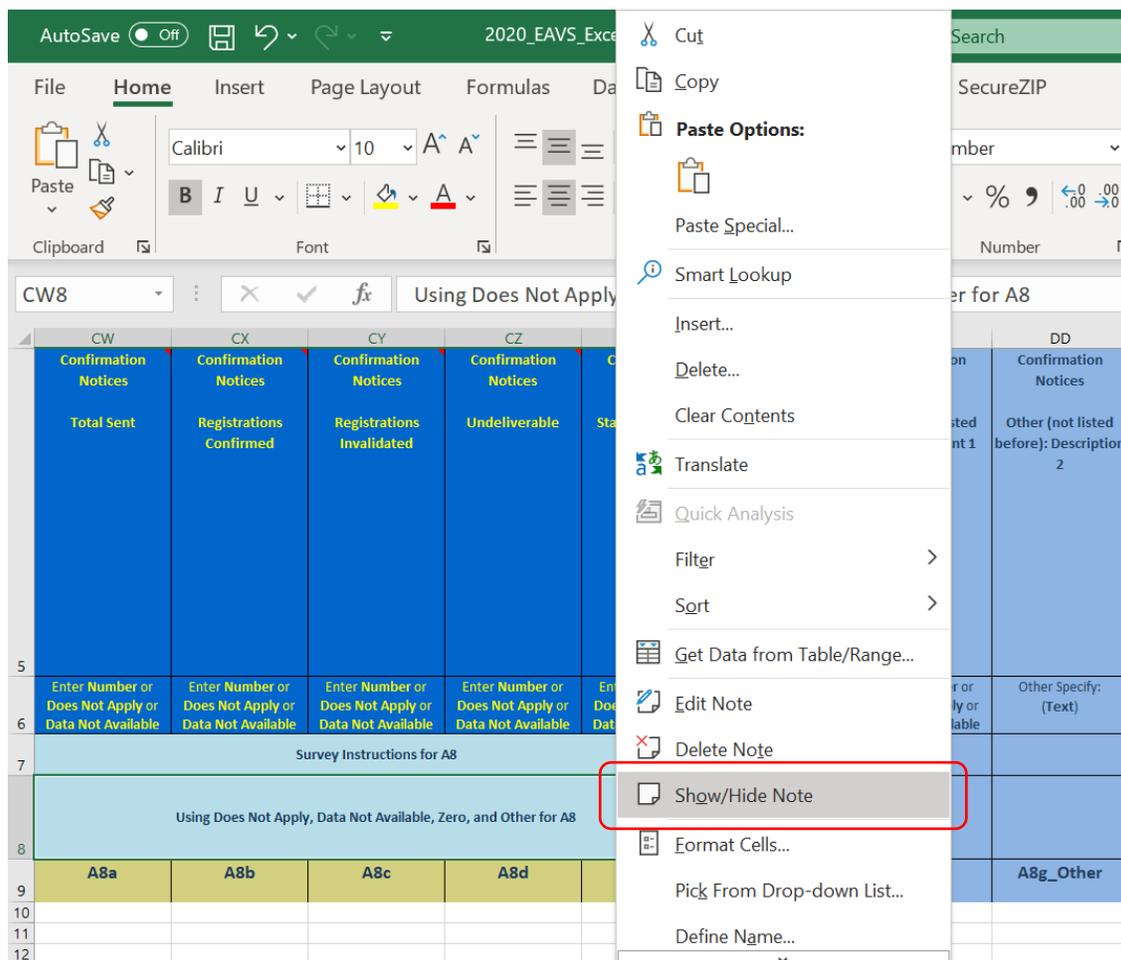
The data header rows (rows 4–9) in the DataTab worksheet contain important information to understanding where to put data within the worksheet. You may wish to keep these header rows visible as you scroll through the worksheet. To do this, select the “View” menu within Excel and select the option to “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 C10 to ensure that you “freeze” the rows containing item information and the columns containing jurisdiction name.



## Using Notes in Microsoft Excel

As detailed in the section [Navigating in the Excel Template](#), rows 7 and 8 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 that 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 around within the worksheet so it does not obstruct the data cells.





## 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 Excel template.

**Copy:** To do this, 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.”

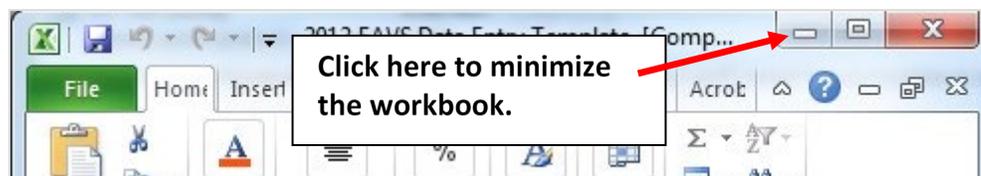
**Paste:** After copying the cell(s), select the area in the Excel template where you would like the contents to be pasted. Then paste the contents into this area by holding down the “Ctrl” and “V” keys on your keyboard at the same time, or by right-clicking and selecting “Paste.”

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 by (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 Excel template where you would like these contents to be pasted, and hold down “Ctrl” and “V” to paste.

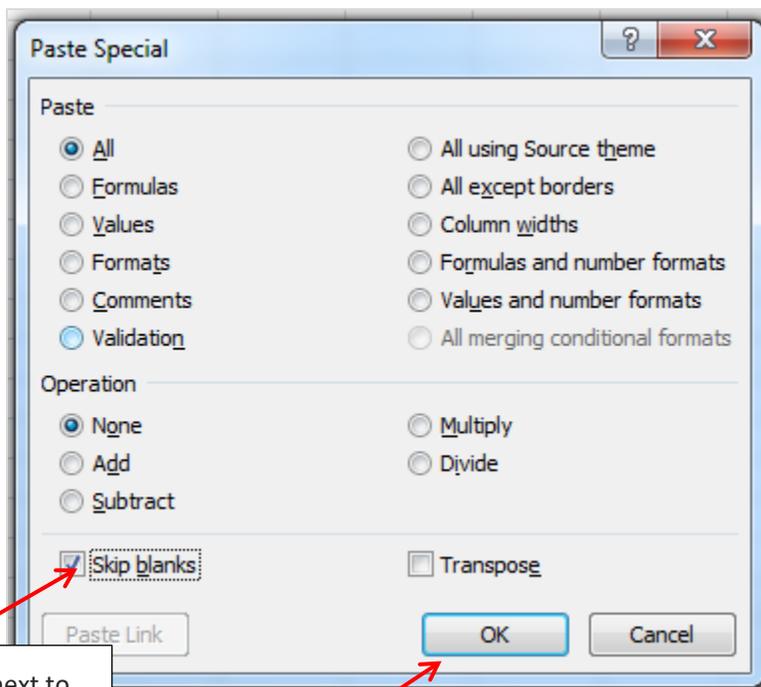


**Paste Special (Skip blanks):** If you have already entered data for some sections of the survey into the Excel template, then you might need to use the “Paste Special: Skip blanks” function to avoid overwriting existing data when pasting new data for other sections.

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