

2022 Election Administration and Voting Survey (EAVS)

Guide to Using the Data Collection Templates

November 14, 2022



Table of Contents

ntroduction	2
he Excel Template	4
Getting Started With the Excel Template	4
Opening and Saving the Excel Template Enabling Macros in Microsoft Excel 2010 and 2013 and Office 365	
Navigating in the Excel Template	7
Entering Data in the Excel Template	9
Using the EAVSRates Tab in the Excel Template	
Submitting Data Using the Excel Template	15
Submitting Final, Certified State Data Using the Excel Template	18
The Online Template	19
Passwords for the Online Template	19
Getting Started With the Online Template	19
Navigating in the Online Template	20
Entering Data in the Online Template	24
Error Checking in the Online Template	27
Submitting Data in the Online Template	28
Submitting Final, Certified Data Using the Online Template	30
ransferring Data Between Templates	31
Coordinating Jurisdiction Data Collection Using the Online Template	31
Using the Online Template for Jurisdiction Review of State Data	32
Using the EAVS Portal to Track Jurisdiction Progress in Online Template	33
Requesting Further Assistance With the Data Collection Templates	35
Appendix	36
Which Version of Microsoft Excel Do I Have?	36
Saving a File in Excel	38
Components of an Excel Workbook	39
Freezing Panes in Excel	41
Hiding and Unhiding Columns in Microsoft Excel	42
Using Notes in Microsoft Excel	43
How to Copy and Paste Data	44



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 2022 Election Administration and Voting Survey (EAVS). These data templates have been redesigned and updated since the 2020 EAVS based on comments and feedback received from election officials. The templates will assist election officials in providing complete and accurate data to the EAC.

There are two data collection templates available:

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

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

- **Sum validations**: Many items in the EAVS ask for a total number and a breakdown of that total into subcategories. In these cases, the validation will flag when the subcategories in a question do not sum to the expected total.
- Logic validations: An alert will appear if a value is incompatible with another response in the survey.
- Policy Survey validations: These validations will flag when an EAVS item is incompatible with a
 response reported by the state in the 2022 Policy Survey.
- **Missing data validations**: Except for most comment boxes and "Other" subcategories, all items in the EAVS require a response. An alert will appear if a response to a required item is not provided.
- Color-coded error check (Excel template only): When the above issues are flagged by the errorchecking functionality in the Excel template, or the error check calculates a percentage that is outside of the expected range, the relevant cells will be color coded to highlight items that need further review.
- EAVS rates (Excel template only): For the first time, the Excel template will include functionality that will use a state's draft data submission to calculate a range of EAVS percentages (e.g., registration rates; ballot transmission, return, count, and rejection rates; and voter turnout rates). The EAVSRates tab can be used by state EAVS POCs to identify potentially erroneous data and to better understand how the EAC plans to report their state's 2022 EAVS data in the comprehensive report that will be published in June 2023.

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





The EAVS project team recommends consulting the <u>2022 EAVS Questionnaire</u> as users work on their data submissions. The 2022 EAVS Questionnaire provides the full question language and its instructions, which will assist users as they enter their data into the data collection templates.

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



The Excel Template

Getting Started With the Excel Template

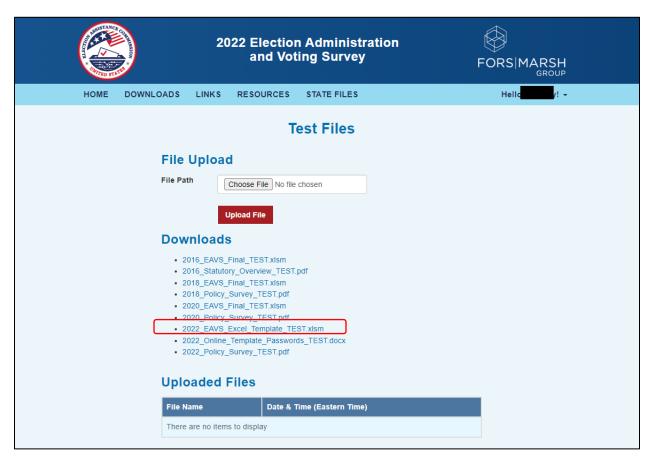
The 2022 EAVS Excel template works best in Microsoft Excel 2007, 2010, or 2013, or Office 365. The Excel template is <u>not</u> compatible with Excel 2003 or earlier. If you cannot use a more recent version of Excel, please <u>contact the EAVS project team</u> to discuss your options.

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

Opening and Saving the Excel Template

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

The Excel template file is located on the State Files page under the Downloads header. The file is named "2022_EAVS_Excel_Template_[your state's postal abbreviation].xlsm." Click on the file name to download it.





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

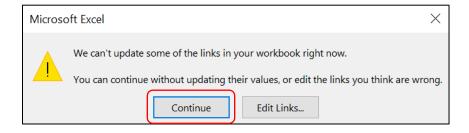


Before proceeding any further, <u>you need to save the file to a location on your computer</u>. This step will ensure that you can find the file again later and that you do not lose any data you have entered into the template. To save the file, first select "Save As" to save the file to a local folder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

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

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

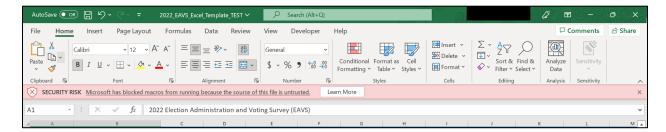


Enabling Macros in Microsoft Excel 2010 and 2013 and Office 365

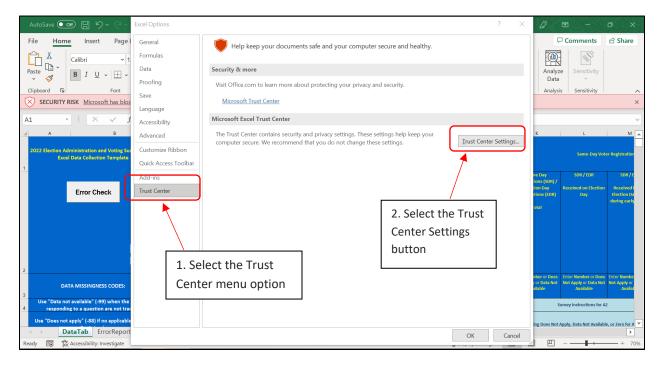
The EAVS Excel template contains macros that flag potential errors in a data submission so that the errors can be addressed before the data are sent to the EAVS project team for review (see the section Error



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

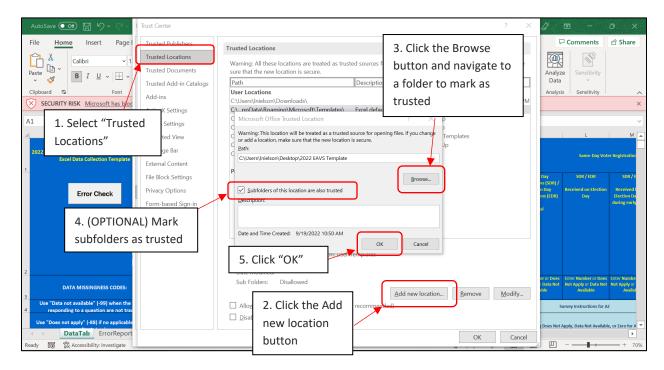


<u>Users of the Excel template must mark the folder in which the template is saved as a trusted location on their computer to ensure the macros can run</u>. To do this, first open the workbook. Click the File tab, then select "Options" (if this selection is not available, you may need to first select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



Clicking this button will open the Trust Center menu. From this menu, select "Trusted Locations" and then "Add new location." This button will open a window from which the user can browse to select the file path where the EAVS Excel template is saved on their computer and click "OK" to mark it as a trusted location. Excel will then permit any file saved in that trusted location to run macros. From the Trusted Locations menu, checking the box next to the option "Subfolders of this location are also trusted" will allow macros to run in any file that is created as a subfolder within the originally designated folder. Once the folder has been designated as a trusted location, click "OK" on all the menus to close them.





With the macros enabled, you are ready to begin entering your data for the 2022 EAVS. The red security risk warning will not be visible, and the macros can now run as intended.

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

Navigating in the Excel Template

When you open the 2022 EAVS Excel template for the first time, you will see several worksheets within the file:

- **DataTab**: This worksheet is where you will enter your data. Each column in this tab represents an EAVS item, and each row represents a jurisdiction within your state or territory.
- GeneralSurveyInstructions: This worksheet contains instructions for each section of the survey. The
 instructions correspond to the instructions listed on pages 1–2, 11–12, 23, 29, 34, and 38 of the 2022
 EAVS Questionnaire. Additional instructions that are specific to each question can be found in the
 DataTab worksheet.
- ColorCodeValidationsGuide: This worksheet lists the types of errors that the data validations look for and how to interpret the color codes that will appear once the file is error checked. See the section Error Checking in the Excel Template for more details.
- EAVSRates: This worksheet shows a series of rates that will be used in the analysis that will be
 published in the EAVS comprehensive report. The first time the Excel template is opened the fields
 will be blank; the rates will not be populated until the Error Check button in the DataTab worksheet
 is clicked. See the section <u>Using the EAVSRates Tab in the Excel Template</u> for more information on
 this tab.



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

Because of the number of columns and rows in the template, you will need to scroll left or right and up or down to view all the items in the DataTab worksheet. It is recommended that you freeze the panes in this worksheet on Cell <u>C7</u> so that the jurisdiction identifiers and EAVS item numbers are always visible to you in the spreadsheet (see the section <u>Freezing Panes in Excel</u> in the Appendix for more instructions).

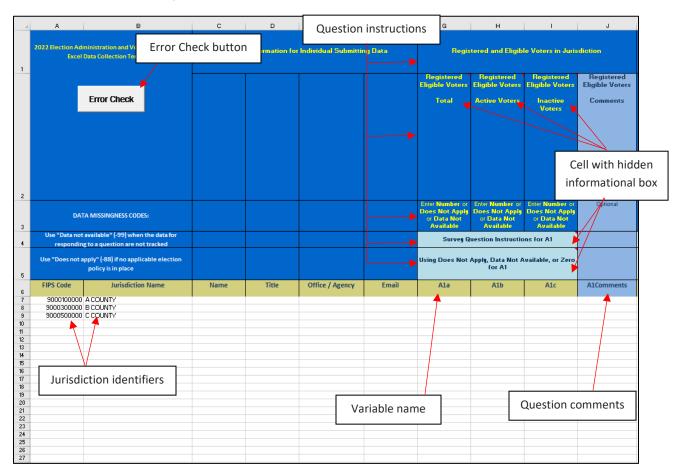
<u>Do not add or delete columns from the DataTab worksheet</u>, as this will interfere with the functionality of the error-checking macros. However, you may hide and unhide rows and columns in this worksheet without affecting the error-checking functionality (see the section <u>Hiding and Unhiding Columns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

The DataTab worksheet contains the following features:

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



• **Error Check button**: Located in Cell A2, clicking this button will run 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.



Entering Data in the Excel Template

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

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

When adding data for different survey sections to the Excel template, you might find it helpful to use the "Paste Special: Skip blanks" function to avoid overwriting data that has previously been entered. See the <u>How</u>



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. Questions D8, F2, F3–F4, F5a, F5b, F5d, F6a, F6b, F6d, F7a, F7b, F7d, F8a, F8b, F8d, F9a, F9d, and F10 use pull-down menus with pre-filled options. You cannot type information into columns with pull-down menus, but you can copy and paste information into those columns. Row 3 of the Excel template has details on what type of response is expected for each EAVS item.

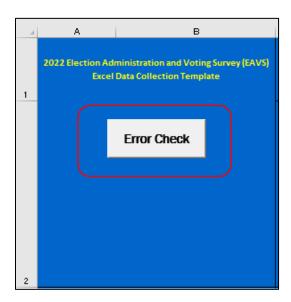
Please attempt to record data according to the categories as they are defined in the question. If your jurisdiction uses a different data classification scheme (e.g., your jurisdiction collects data in such a way that combines two or more categories listed in a question), then you can use the space provided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

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

Template users should note that <u>Column RG</u> contains the state's postal code abbreviation for each jurisdiction within the state. <u>This column is critical to the functioning of the error check and should not be moved, deleted, or altered.</u>

Error Checking in the Excel Template

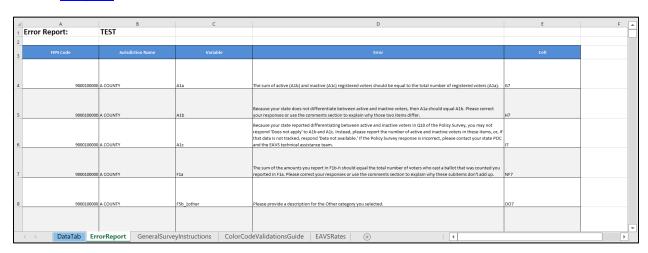
The 2022 Excel template has a built-in error-checking function that allows you to check your entire worksheet for potential data errors. To run the error-checking procedure, click the Error Check button, located in Cell A2 of the data collection worksheet. Before beginning the error check, please save your data.





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

- **ErrorReport**: This worksheet contains a full error report with tables, organized by jurisdiction, that lists the FIPS code and jurisdiction name, the variable causing the error, a description of the error, and the cell that the error appears in. The ErrorReport worksheet will appear immediately after the DataTab worksheet. If a blank error report is generated, this indicates that none of the macros generated an error, and there are no data errors to review in the submission.
- **EAVSRates**: This worksheet uses the data in the DataTab worksheet to calculate a number of EAVS percentages by jurisdiction and for the state as a whole. This tab appears at the end of the list of tabs, after the ColorCodeValidationsGuide tab. See the section <u>Using the EAVSRates Tab in the Excel</u> Template for more information on this tab.



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

- Sum validations: These validations will flag when subcategories do not sum to the expected total.
 - Example: The total number of voters who cast a ballot that was counted in the 2022 election, as reported in F1a, should match the sum of the number of voters who used different modes of voting (items F1b to F1h).
 - O Color code—Drange: When the sum of the subcategories for one item does not add up to the reported total, the cell corresponding to the total in the DataTab worksheet will be highlighted orange. Please note that although the orange highlighted cell will be the total, the cause of the non-matching sum may be in one of the subitems. Using the example above, if the sum of F1b to F1h does not add up to the number reported in F1a, then the cell for F1a will be highlighted orange in the DataTab worksheet, but the item(s) causing the error can be anywhere in F1a to F1h.
- **Logic validations**: These validations will flag a value if it is incompatible with another response in the survey.
 - Example: The number of mail votes returned and counted, as reported in C8a, should not exceed the number of 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 green. In the example above, the cell for C1b would appear highlighted green in the DataTab worksheet. However, when looking for the source of the problem, the user should review the items mentioned in the error message to determine where the issue is located (e.g., C8a and C1b in the example above).
- **Policy Survey validations**: These validations will appear when an EAVS item data conflicts with the state's Policy Survey data submission.
 - Example: If a state has an online voter registration system (i.e., responded "Yes" to Q6 of the Policy Survey), then no jurisdiction from that state should respond "Does not apply" to the number of registrations received online 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 yellow. In the example above, the cells corresponding to A4c, A5c, A6c, and A7c would appear highlighted yellow in the DataTab worksheet if a response of "Does not apply" is entered. If the EAVS data are correct and the Policy Survey data are incorrect, then contact the EAVS project team.
- Missing data validations: Except for most comment boxes and "Other" subcategories, all items in the survey require a response. An alert will appear if a response to a required item is not provided.
 - Example: If a state reports the total number of registered and eligible voters in A1a but leaves blank the subitems for active and inactive registered voters, then A1b and A1c will be flagged. Instead of leaving items blank when you do not have a response to provide, report "Does not apply" (if your state does not have an applicable law or policy), "Data not available" (if your state does not track data for an item), or zero (if no instance of an item occurred).
 - Color code—<u>Light blue</u>: When a required EAVS item is left blank, the cell(s) will be highlighted light blue. In the example above, the cells corresponding to A1b and A1c would appear highlighted light blue in the DataTab worksheet.
- **EAVS rates validations**: The EAVSRates tab will calculate select EAVS percentages using the information from the DataTab worksheet. Macros will highlight when a percentage falls outside the expected range for that calculation. Expected ranges are calculated based on analysis of previous EAVS data and are intended to flag extreme cases (e.g., when the percentage of active registered voters who turned out to vote in a jurisdiction is lower than 35% or greater than 95%).
 - Example: The percentage of transmitted mail ballots that were returned by voters (C1b/C1a x 100) generally should not be higher than 95% or lower than 5%.
 - Color code—<u>Light red</u>: When an EAVS rate does not fall within the expected range for that calculation, the entry on the EAVSRates tab will be highlighted light red.

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

Please carefully review every validation error you receive. When corrections are warranted, make them directly in the DataTab worksheet. If your data submission is correct but the template still shows an error, use the comment box appended to each question to add an explanation. This will help the EAVS project team





assess and report your data accurately. Any errors that were not corrected or explained in the comment boxes will be flagged for further review after the data submission deadline.

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

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

4	А	В	G	Н	1
	FIPS Code	Jurisdiction Name	A1a	A1b	A1c
6					
7	9900100000	COUNTY A	157,631	151,290	6,341
8	9900300000	COUNTY B	510,831	487,587	23,244
9	9900500000	COUNTY C	219,145	214,668	4,477
10	State Totals		887,607	853,545	34,062
11					

Note that the Excel template may auto-populate some items with a VALID SKIP code after performing the error check. This automatically generated data code indicates the items that are skipped based on responses to related survey items (e.g., if a jurisdiction official reports that zero ballots were transmitted to military and overseas voters in item B5a, then items B5b through B22c will be automatically populated with the VALID SKIP code). This code is built into the programming of the Excel template and should not be manually entered anywhere else.

Using the EAVSRates Tab in the Excel Template

The 2022 EAVS Excel template has a separate tab that contains percentages calculated using the data from the DataTab worksheet. The EAVSRates tab can be used by state EAVS POCs to better understand how the EAC plans to report their state's 2022 EAVS data in the comprehensive report that will be published in June 2023. The tab can also be used to identify potentially erroneous data, so it can be addressed before sending the data to the EAVS project team for review.

The contents of the EAVSRates tab will be deleted and regenerated each time the Error Check button is clicked. The EAVSRates tab is a separate tab located after the ColorCodeValidationsGuide tab. The EAVSRates tab will list each jurisdiction within the state and will calculate key EAVS rates. Row 1 in this tab contains a description of the EAVS rate, and Row 2 contains the formula that was used to calculate the rate. Each rate will be calculated for each individual jurisdiction within the state and for the state as a whole in the "State Totals" row.



4	А	В	С	D	E	F	G	Н
1				Percent of registrations that were new and valid	Percent of registrations that were duplicates	Percent of registrations that were rejected	Percent of registrations that were within- jurisdiction changes	Percent of registrations received by mail
2	FIPS Code	Jurisdiction Name	State	(A3b/A3a) x 100	(A3d/A3a) x 100	(A3e/A3a) x 100	(A3f/A3a) x 100	(A4a/A3a) x 100
3	9000100000	A COUNTY	TEST	28.0%	9.1%	5.0%	44.8%	33.1%
4	9000300000	B COUNTY	TEST	39.3%	2.0%	2.5%	30.8%	38.5%
5	9000500000	C COUNTY	TEST	35.2%	3.4%	2.8%	34.4%	34.4%
6	State Totals			35.5%	4.1%	3.2%	35.1%	36.1%
7								
8								
9								

The rates are calculated only when there is a numeric response larger than zero for the denominator, and the numerator is either a number or is blank (which would yield a 0.0% rate). If the response to any of the items involved in the rate is "Data not available," "Does not apply," or "Valid skip," the field for that calculation will be blank.

The state's EAVS POC(s) should review the EAVSRates tab before submitting their draft EAVS data to the EAVS project team to ensure that the calculated rates in this tab match expectations. The EAVSRates tab also contains features that assist in identifying potentially erroneous data. EAVS rates that fall outside of an expected range will be highlighted **light red**, and an entry for the error will be added to the ErrorReport tab, with a description of the error and the items that should be reviewed for correctness. The entries for the EAVSRates errors in the ErrorReport tab will appear below the errors that are highlighted from the DataTab.

	А	В	С	D
1				Percent of registrations that were new and valid
2	FIPS Code	Jurisdiction Name	State	(A3b/A3a) x 100
3	9000100000	A COUNTY	TEST	101.2%
4	9000300000	B COUNTY	TEST	39.3%
5	9000500000	C COUNTY	TEST	35.2%
6	State Totals			52.5%
7				
8				



1	A	В	С	D	E
1	Error Report:	TEST			
2					
-					
3	FIPS Code	Jurisdiction Name	Variable		
4	9000100000	A COUNTY	A3a	The sum of the numbers you report in A3b-j should equal the total number of registration forms you report in A3a.	07
5	9000100000	A COUNTY	A3b	The sum of the numbers you report in A5a-I should equal the total number of registration forms you reported in A3b.	P7
				The sum of the amounts you report in F1b-h should equal the total number of voters who cast a ballot that was counted you	l
6	9000100000	A COUNTY	F1a	reported in F1a. Please correct your responses or use the comments section to explain why these subitems don't add up.	NF7
7	9000100000	A COUNTY	F8b 3other	Please provide a description for the Other category you selected.	QL7
/	9000100000	A COUNTY	ron_sourier	Prease provide a description for the other category you selected.	LUL7
			Percent of registrations that were	This percentage is higher than expected. Please review items A3a and A3b for this jurisdiction to ensure the data are correct.	
8	9000100000	A COUNTY	new and valid		EAVSRates D7

Submitting Data Using the Excel Template

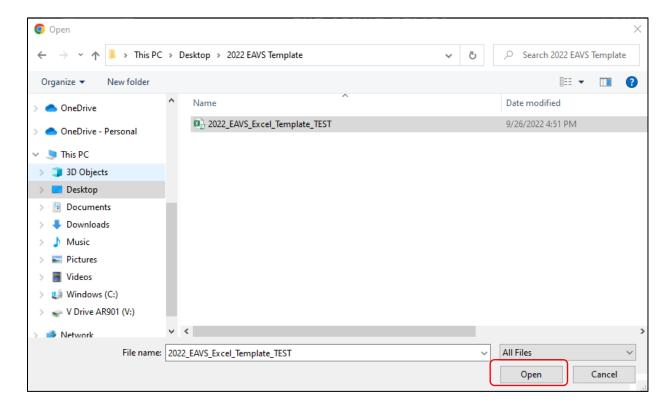
Once you have completed your EAVS data entry, have error checked your data, have addressed as many errors as possible, and have added the comments necessary to interpret the data, you may submit the completed Excel template for your state through the EAVS Portal so that the EAVS project team can review it. Make sure 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 portal credentials. Under the File Upload header on the State Files page, click on "Choose File."



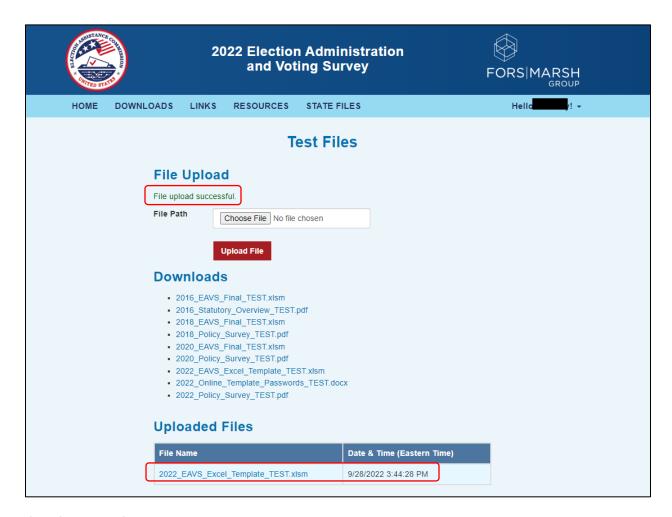
Navigate to the location where you saved the Excel template on your local computer, click on the file name, and select "Open."





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





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

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



Submitting Final, Certified State Data Using the Excel Template

After a state submits its draft EAVS data by February 1, 2023, the EAVS project team will review the submission and send a written memorandum to the state's EAVS POC(s) summarizing the items in the data that need further review before the state's submission can be certified as final.



The Online Template

Password for the Online Template

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

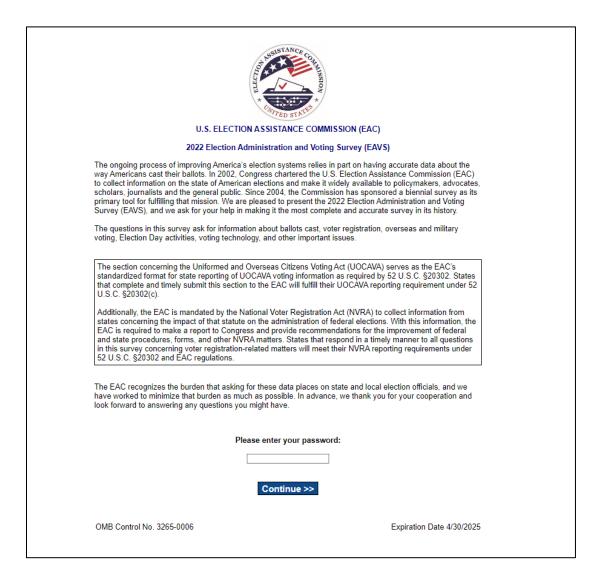
Each EAVS jurisdiction (typically a county or municipality, in most states) has been assigned a unique password. Should the state's EAVS POC(s) wish to use the online template to collect data from its jurisdictions, the state's EAVS POC(s) will be responsible for distributing the passwords to jurisdiction officials. A list of assigned passwords can be downloaded from the EAVS Portal. After logging into the EAVS Portal using the portal credentials for your state, click on the link for the file titled "2022_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 EAVS 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, users will need to enter the password for the jurisdiction for which they will be entering data. Those passwords have been provided to the EAVS POC(s) for each state. If you are a jurisdiction official who has been asked to complete the online template and you have not received your password or have misplaced it, please contact your state's EAVS POC(s).

The online template is most compatible with Microsoft Edge, Mozilla Firefox, and Google Chrome. If you have difficulty accessing the survey, 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 that outlines the instructions for completing this survey online and asks for the contact information (i.e., name, title, office/agency name, and email address) of the person responsible for completing the EAVS in your jurisdiction. This information will only need to be entered once; however, if you need to return to this page to review the instructions or to update the contact information, select the Instructions and Contact Information option from the main menu of the survey.

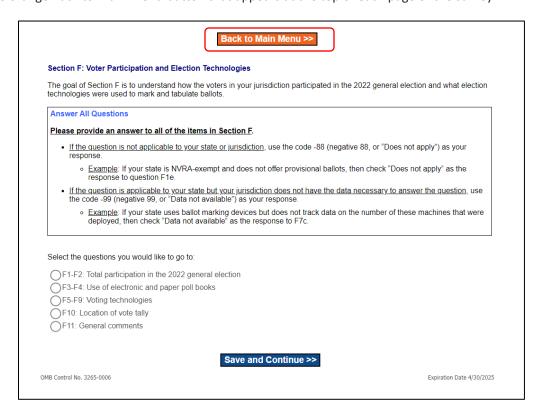
On the main menu, you can choose which part of the survey to complete first. There are options in this menu to return to the Instructions and Contact Information section, to complete any of the six sections within the EAVS (Sections A–F), and to review responses and submit data. You do not have to complete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



Section A: Voter Registration Section B: Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA) Section C: Mail Voting Section D: In-Person Polling Operations Section E: Provisional Ballots Section F: Voter Participation and Election Technologies Review Responses and Submit Data	
Section C: Mail Voting Section D: In-Person Polling Operations Section E: Provisional Ballots Section F: Voter Participation and Election Technologies	
Section D: In-Person Polling Operations Section E: Provisional Ballots Section F: Voter Participation and Election Technologies	
Section E: Provisional Ballots Section F: Voter Participation and Election Technologies	
Section F: Voter Participation and Election Technologies	
Review Responses and Submit Data	

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(s).

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





When you are viewing a survey question, there will be four ways to navigate through the survey: Above the question, there is a button that will take you back to the current section's menu and another button that will return you to the main menu of the survey. Below the survey question on the page, there is a Back to Previous Page button that will return you to the previous screen and a blue Save and Continue button that will save the data you have entered on the current page and advance you to the next screen in the survey. This Save and Continue button will also run an error check on the data you have entered on the current page (see the section Error Checking in the Online Template for more detail). Please note that the Back to Main Menu, and Back to Previous Page buttons do not save any data. If you wish to save your data before proceeding in the survey or if you wish to exit the survey, please ensure you have clicked "Save and Continue" to protect against data loss. Do not use your browser's back button to navigate through the survey, as that may cause errors or data loss.

Back to Section C Menu >> Back to Main Menu >>	>		
C7. Mail Ballot Curing			
For question C7a, report the total number of successfully cured mail ballots in your jurisdiction for ballot is defined as a returned mail ballot that was originally rejected for an error or because it was was ultimately counted because the voter corrected the error or supplied the required information	s missing		
If your state does not allow voters to cure errors or missing information on their mail ballots, report your state allows for mail ballot curing but does not track data on the number of mail ballots that we ("Data not available") in C7a.			
	(?)	Data not available ^(?)	Does not apply ^(?)
C7a. TOTAL number of mail ballots that were successfully cured: Total number of ballots that were originally rejected for errors or missing information but were ultimately counted because the voters corrected the error or supplied the required information.			
C7 Comments:			
Save and Continue > 00MB Control No. 3265-0006	>	Expiration	Date 4/30/2025

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





☐ Instructions and Contact Information - Reviewed!	
Section A: Voter Registration - 100% Reviewed!	
Section B: Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA) - 42% Reviewed!	
Section C: Mail Voting	
Section D: In-Person Polling Operations - 100% Reviewed!	
Section E: Provisional Ballots	
Section F: Voter Participation and Election Technologies	
Review Responses and Submit Data	
<< Back to Previous Page	
3 Control No. 3265-0006	Expiration Date 4/30/2025

Back to Main Menu >>

Section E: Provisional Ballots

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

- 1. How many individuals cast a provisional ballot in the 2022 general election?
- 2. What were the reasons the the provisional ballots were cast?
- 3. What were the reasons provisional ballots were rejected?

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

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

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

Answer All Questions

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

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

Select the questions you would like to go to:

E1-E2: Provisional ballots cast - Reviewed!

E3: Provisional ballots rejected

Save and Continue >>

OMB Control No. 3265-0006 Expiration Date 4/30/2025



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

Entering Data in the Online Template

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

		Data not available ^(?)	Does not apply ^(?)
	ered and eligible voters: who registered after the 2022 deadline for registration or who may be registered under a pre-registration		
A1b. TOTAL number of active Fully eligible voters who have n voting.	e voters: ^(?) to additional processing requirements to fulfill before		
A1c. TOTAL number of inactive Voters who were eligible to vote of the National Voter Registration	but required address verification under the provisions		
Comments:			

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



D8. Ease of Recruiting Poll Workers
How difficult or easy was it for your jurisdiction to obtain a sufficient number of poll workers for the November 2022 general election? Please select one option. In addition, use the D8 Comments box to provide further information about your experience recruiting poll workers for this election.
○Very difficult
Somewhat difficult
Neither difficult nor easy
Somewhat easy
Very easy
Not enough information to answer

F3-F4. Use of Electronic and Paper Poll Books

For questions F3 and F4, indicate whether your jurisdiction used electronic poll books or printed, paper poll books in polling places in the November 2022 general election for the listed activities. Completely vote-by-mail jurisdictions that have no in-person voting options should answer "No" to all items.

For the purposes of these questions, an electronic poll book (e-poll book) is a type of hardware, software, or a combination of both that is used in the place of a traditional paper poll book that lists all registered voters. These are not voting machines and are not used in the process of voting.

For each item below (a, b, c, d, and e), indicate whether your jurisdiction used electronic poll books/electronic lists of voters or traditional paper poll books at polling places for the following functions in the November 2022 general election?

Use of Poll Books	F3. Electronic Poll Book ^(?)	F4. Paper Poll Book ^(?)
a. Sign voters in	Select an answer 🕶	Select an answer ✔
b. Update voter history	Select an answer Yes	Select an answer 🕶
c. Look up polling places	No	Select an answer 🕶
d. Assist with same-day registration	Select an answer 🕶	Select an answer 🕶
e. Check voter's mail ballot status	Select an answer 🕶	Select an answer 🕶
f. Other: ^(?)	Select an answer 🗸	Select an answer ✔

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



	(?)	Data not available ^(?)	Does not apply ^(?)
E1a. TOTAL number of voters who submitted provisional ballots: The number of voters who submitted provisional ballots, regardless of whether or not to provisional ballot was ultimately counted in part or full.	he		
E1b. Provisional ballots that were counted in full			
E1c. Provisional ballots that were counted in part (e.g., only the items on the ballot for which the voter would have been eligible had they voted in the correct precinct)	,		
E1d. Provisional ballots that were rejected			

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

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 2022 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 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. Please provide a response to A1c. Does Data not not available^(?) apply(?) A1a. TOTAL number of registered and eligible voters: Do not include any individuals who registered after the 2022 deadline for registration or 29,274 individuals under the age of 18 who may be registered under a pre-registration program. A1b. TOTAL number of active voters:(?) 26,342 Fully eligible voters who have no additional processing requirements to fulfill before A1c. TOTAL number of inactive voters:(?) Voters who were eligible to vote but required address verification under the provisions of the National Voter Registration Act (NVRA).

Use the comment boxes as needed to provide additional information regarding how you answer the questions, including any explanations about the quality of the data you are providing. If an EAVS item does not apply to your state or jurisdiction because you do not have a law that allows for it, then you may select "Does not apply" as your response. If your state or jurisdiction does not track data for an item, then you may select "Data not available" as your response. There are instructions throughout the survey that provide



helpful advice and examples for when to use the "Does not apply" and "Data not available" responses. These instructions can be accessed by hovering your mouse over any blue question mark you see in the survey.

	C4. Election	C4. Data not	C5. Early	C5. Data not	Does not
	Day ^(?)	available ^(?)	voting ^(?)	available ^(?)	apply ^(?)
a. TOTAL drop boxes used during	Include any drop boxes that were available for voters to use on Election Day (November 8, 2022).				
the specified voting period					
b. Drop boxes located at election					
offices ^(?)					
c. Drop boxes located at non-					
election office sites (?)					

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

Error Checking in the Online Template

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

- **Sum validations**: These validations will flag an item when subcategories do not sum to the expected total.
 - Example: The total number of voters who cast a ballot that was counted in the 2022 election, as reported in F1a, should match the sum of the number of voters who used different modes of voting (items F1b to F1h).
- **Logic validations**: These validations will flag an item if a value is incompatible with a response that was previously entered in the survey.
 - Example: The number of mail ballots returned and counted, as reported in C8a, should not exceed the number of mail ballots returned by voters, as reported in C1b.
- **Policy Survey validations**: These validations will flag an item when an EAVS item conflicts with the state's Policy Survey data submission.
 - Example: If a state has an online voter registration system (i.e., responded "Yes" to Q6 of the Policy Survey), then no jurisdiction from that state should respond "Does not apply" to the number of registrations that were received online in items A4c, A5c, A6c, and A7c.
- Missing item description: These validations will flag when data has been entered into an "Other" subcategory but no corresponding text description has been entered.
 - Example: If a jurisdiction reports that 92 voters cast ballots that were counted by other voting methods in F1h, then the jurisdiction is required to include a text description of the type of voting that these 92 voters used to cast their ballots.



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

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 2022 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 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.

The sum of active (A1b) and inactive (A1c) registered voters should be equal to the total number of registered voters (A1a).

		Data not available ^(?)	Does not apply ^(?)
A1a. TOTAL number of registered and eligible voters: Do not include any individuals who registered after the 2022 deadline for registration or individuals under the age of 18 who may be registered under a pre-registration program.	398,530		
A1b. TOTAL number of active voters:(?) Fully eligible voters who have no additional processing requirements to fulfill before voting.	398,530		
A1c. TOTAL number of inactive voters: (?) Voters who were eligible to vote but required address verification under the provisions of the National Voter Registration Act (NVRA).	32,116		

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

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

Submitting Data in the Online Template

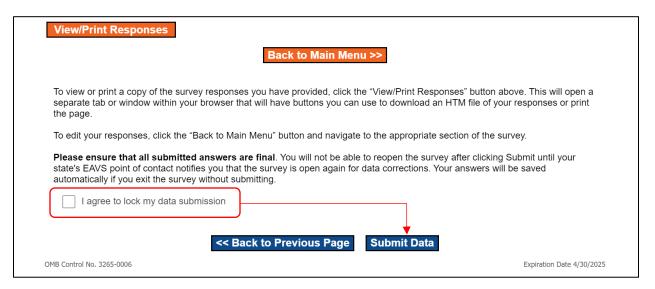
Once all your data have been entered, you have addressed as many errors as possible, and you are ready to submit, navigate to the survey's main menu and select "Review Responses and Submit Data."



○Instructions and Contact Information - Reviewed!	
Section A: Voter Registration - 100% Reviewed!	
Section B: Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA) - 100% Reviewed!	
Section C: Mail Voting - 100% Reviewed!	
Section D: In-Person Polling Operations - 100% Reviewed!	
Section E: Provisional Ballots - 100% Reviewed!	
Section F: Voter Participation and Election Technologies - 100% Reviewed!	
Review Responses and Submit Data	
Course and Continue by	
<< Back to Previous Page Save and Continue >>	

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

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



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



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

Submitting Final, Certified Data Using the Online Template

After a state submits its draft EAVS data by February 1, 2023, the EAVS project team will review the submission and send a written memorandum to the state POC(s) summarizing the items in the data that need further review before the state's submission can be certified as final. When the memo is sent, the EAVS project team will also reopen the online template for all the state's jurisdictions. State EAVS POCs should notify jurisdiction officials that the online template is open again and that the jurisdiction's original password can be used to re-access the survey. All the data originally submitted by the jurisdiction officials will be available in the online template, and jurisdiction officials can make any necessary edits to their data. Once the data are ready to certify as final, the jurisdiction officials may use the process outlined above to resubmit 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 (https://eavsportal.com/) will format the data submitted via the online template and transfer that data into each state's Excel template for the state to review. Data submitted via the online template will be posted to the EAVS Portal every 2 hours between 6 a.m. and 6 p.m. eastern time (7 times daily). The name of this file will be "2022_EAVS_Online_Data_YYYYMMDD_HHmm_[postal code].xlsm." "YYYYMMDD" represents the date and "HHmm" represents the time stamp (using the 24-hour clock in eastern time) of when the data file was generated. For instance, a file generated on January 24, 2023, at 2:05 p.m. eastern time will be named "2022_EAVS_Online_Data_20230124_1405_[postal code].xlsm."

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

Coordinating Jurisdiction Data Collection Using the Online Template

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

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

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



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





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

Using the Online Template for Jurisdiction Review of State Data

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



- 1. The state's EAVS POC uses the Excel template to compile data reported centrally by the state.
- 2. The state's EAVS POC sends the Excel template to the EAVS project team to request that the data be uploaded to the online template <u>before</u> jurisdiction officials begin their data entry.
- 3. Using data from the Excel template, the online template is pre-populated with responses.
- 4. The EAVS project team notifies the state's EAVS POC when the request is complete and the survey is ready for jurisdiction officials to begin data entry.



- After receiving confirmation that the data upload is complete, the state's EAVS POC contacts jurisdiction officials to review the data. Jurisdiction officials' unique passwords are provided to each state's EAVS POC through the EAVS Portal (https://eavsportal.com/).
- Jurisdiction officials access the online template, review responses, edit pre-filled data, and report additional EAVS items.
- 7. Jurisdiction officials submit their online template for review by the state's EAVS POC.





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

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

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

The Online Survey Tracking Status table lists each jurisdiction within the state, the jurisdiction's status (i.e., Not Started, In Progress, Complete, or Data Edits), the percentage of the EAVS questions the jurisdiction has completed in the online template, and a time stamp of when the jurisdiction last accessed the online template. Because the completion percentage includes any items that have been pre-filled based on the state's 2022 Policy Survey responses or at the state's request, some jurisdictions' completion percentages may be greater than 0% even if a jurisdiction has not yet accessed the online survey. Because the denominator of the completion percentage calculation includes non-required survey items (such as optional comment spaces and optional "Other" items within certain questions), a jurisdiction's EAVS submission may be functionally complete even if its completion percentage is not 100%.

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



Online Survey Tracking Status

Last Updated: Monday, October 17, 2022 3:34:43 PM EST

Jurisdiction 🏨	Status 🎵	% Complete 📗	Last Accessed (EST)
ACCOMACK COUNTY	Completed	100%	2022-09-23 16:14:31
ALBEMARLE COUNTY	Not Started	0%	
ALEXANDRIA CITY	Not Started	0%	
ALLEGHANY COUNTY	Data Edits	77%	2022-10-03 09:07:15
AMELIA COUNTY	In Progress	69%	2022-10-06 11:42:48
AMHERST COUNTY	Completed	100%	2021-09-29 21:56:22
APPOMATTOX COUNTY	Not Started	0%	
ARLINGTON COUNTY	In Progress	11%	2022-10-17 11:20:37
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 have not been answered in this guide or if you experience technical issues with the data collection templates, please reach out to the EAVS project team by email (eavs@forsmarsh.com) or by telephone. The telephone number for the EAVS project team will be available to state EAVS POCs on the State Files page on the EAVS Portal, which can be accessed by navigating to https://eavsportal.com/Account/Login and using your login credentials.

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



Appendix

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

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

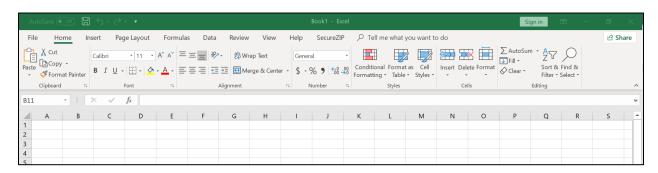
This guide is most applicable to users running Microsoft Excel 2010 and 2013 and Office 365. If you use an earlier version of this software (such as Excel 97–2003 or 2007) and need technical assistance, please contact the EAVS project team.

Which Version of Microsoft Excel Do I Have?

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

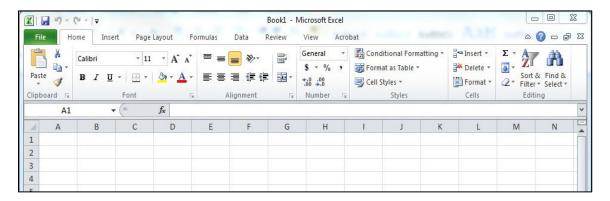
To determine which version of Excel you have, first open either the 2022 EAVS Excel template or a blank Excel workbook.

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

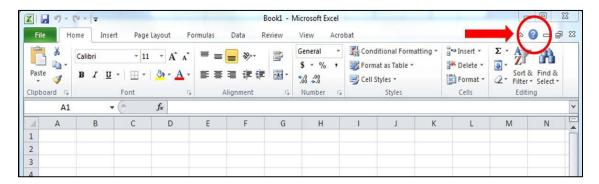




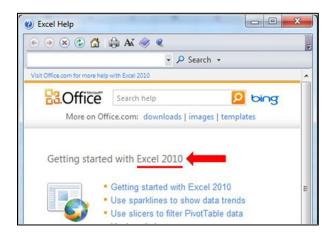
If you are using Excel 2007, 2010, or 2013, then the Excel menu will look similar to this:



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.



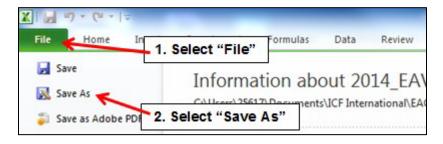


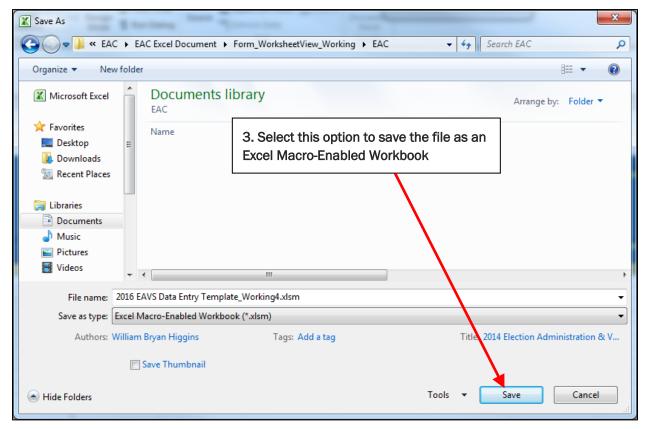
Saving a File in Excel

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

Saving in Excel 2010 or 2013

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



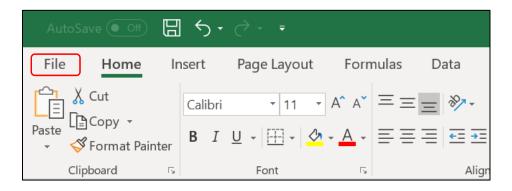




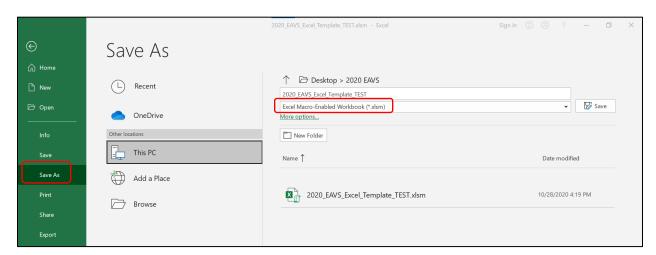
Click "Save" or hit "Enter" on your keyboard when done.

Saving in Office 365

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



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



Components of an Excel Workbook

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

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



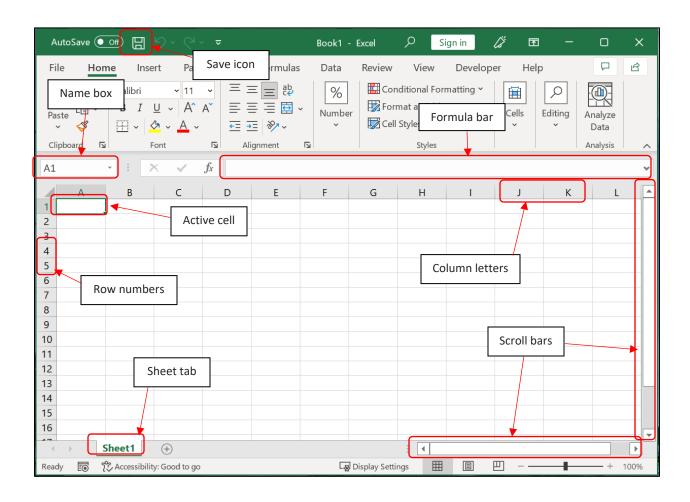
Excel's menus and toolbars, which cover approximately the top quarter of the screen, differ slightly between Excel 2010 and 2013 and Office 365. These features can be used to format and adjust the appearance of the worksheets, to sort data, to insert formulas, and to perform other advanced operations.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

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

- Active Cell: This is the "current cell" or the cell that is in focus. A thick black outline surrounds this cell. Whenever you type something on the keyboard, it will appear in the active cell. You can change which cell is active by clicking with the mouse or using the arrow keys on the keyboard.
- Formula Bar: You can also enter data into the active cell by typing your data in the formula bar.
- Columns and Rows: Columns run vertically and are designated by letters; rows run horizontally and are designated by numbers. The intersection of column letters and row numbers creates a cell reference (e.g., A1).
- Name Box: The name box displays the cell reference (e.g., A1) of the active cell.
- **Sheet Tabs**: The sheet tabs are in the bottom-left corner and allow the user to navigate between different worksheets. 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 2022 EAVS Excel template are very large. You will need to scroll horizontally to view all the columns you will need to enter data in. Depending on the number of jurisdictions in your template, you may also need to scroll vertically. You can scroll up and down by clicking and dragging the vertical scroll bar on the far-right corner of your screen. Likewise, click and drag the horizontal scroll bar—located in the bottom-right corner—to scroll left and right. You can also make different cells active by using the arrow keys. The worksheet will scroll appropriately to always keep the current active cell in view.
- Save Icon: This button can be clicked to save any data entered in the workbook. This can also be accomplished by holding down the Ctrl + S keys or \Re (Command) + S keys on your keyboard.

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

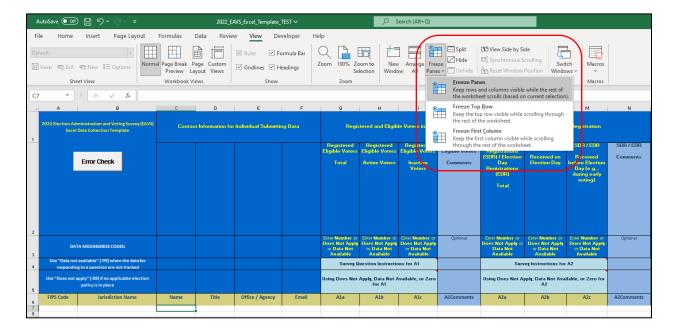




Freezing Panes in Excel

The data header rows (rows 1–6) in the DataTab worksheet contain important information to understanding where to put data within the worksheet. You may wish to keep these header rows visible as you scroll through the worksheet. To do this, select the View menu within Excel, and 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 C7 to ensure that you "freeze" the rows containing item information and the columns containing jurisdiction name.



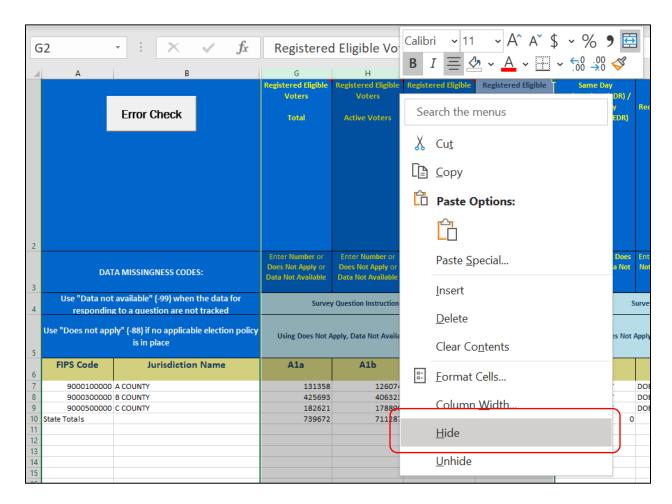


Hiding and Unhiding Columns in Microsoft Excel

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

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





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

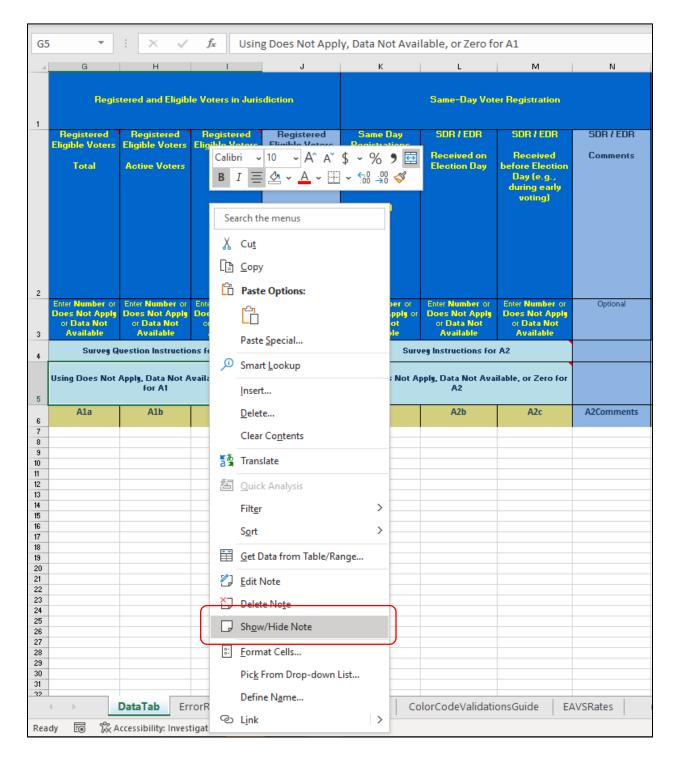
If a column is hidden from view, Microsoft will still copy data from the hidden column or paste data into the hidden column if the hidden column is within the selection.

Using Notes in Microsoft Excel

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

To show a note so 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 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 cell in Excel. You might even wish to copy cell contents from another Excel workbook, or information from another file format, into the Excel template.



Copy: To do this, select the cell or the specific contents of a cell(s) that you wish to copy. Then, 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 click "Copy."

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

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

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

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

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

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

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

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



Paste Specia	ıl	? ×
Paste		
		All using Source theme
O <u>F</u> ormula	as	All except borders
○ <u>V</u> alues		Ocolumn <u>w</u> idths
O Forma <u>t</u>	S	Formulas and number formats
O Comme	ents and Notes	Values and number formats
O Validati	o <u>n</u>	All merging conditional formats
Operation — None	1. Check the box next to "Skip blanks"	2. Click the "OK" button to paste the data
○ A <u>d</u> d ○ <u>S</u> ubtrac	t 🗸	O <u>i</u> vide
Skip <u>b</u> la	anks	Transpos <u>e</u> OK Cancel