

myES&S Customer Portal Guide

This Best Practice document is intended to be used as a guide while completing the myES&S Customer Portal, not all items are included below. All services used in Montana are reflected but may not be required by all customers for completion.

Election Forms - Each myES&S Portal form has a **FORMS GUIDE** button located in the upper right-hand corner for your reference.

Note: When completing your myES&S Customer Portal forms, ALL Layout and Programming forms must be submitted  before proofing will begin. Layout and Programming forms include Pre-election Questionnaire, Precinct List, Contests & Candidates, Questions & Referenda, Ballot Assignment Chart, Pronunciation Guide, and Programming Form.

- **Pre-Election Questionnaire (PEQ)-**
 - General Information
 - Published Election Calendar dates will prepopulate here.
 - In lieu of the Election Calendar and a date is not applicable, but field is required, enter the election date.
 - If time is not applicable, but field is required, Open Time: 12am; Close Time: 12pm
 - Paper Ballot Preferences
 - Standard ballot 14"
 - Election By* – Precinct ID
 - Equipment
 - ExpressVote only users will select their equipment as pictured in the image below:

Software*

Please validate the software to be used on this election or select a different one if needed.

Electionware

Equipment*

Equipment will be used No equipment will be used

Please indicate the equipment that you will be using for this election.

ADD EQUIPMENT

Quantity	Product	Description
1	EXPRESSVOTE	

Media*

ES&S will burn the media ES&S will not burn the media

- ES&S Services Requested
 - Your focus will be the following services, which you will select “Yes” to.

Will you require paper ballots? *

Yes No

- Paper Ballot Layout and Tabulation – If using ExpressVote, select YES for “**Will you require paper ballots?**” In the ES&S Services Requested tab of the Pre-Election Questionnaire. The Contest and Candidates, Questions and Referenda, Ballot Assignment Chart and Programming forms will populate to be Submitted.

Will you require programming of Tabulation Equipment? *

Yes No

- Select yes to “**Will you require programming of Tabulation Equipment?**” – This will ensure the required Programming form will populate.

Will you require Audio Files? *

Yes No

- If you require Audio files on your ExpressVote, so the ballot can be read by the machine to a voter, select yes.
- If you need Printed ballots, select **Yes** to “**Will you require printing of paper ballots?**”
- Media – The total quantity of media will be 2 - 4GB thumb drives; 1 EQC and 1 ExpressVote that will be sent to ES&S for programming.
 - If you need to purchase thumb drives for the use of the ExpressVote ONLY, please email orders@essvote.com or call 877-377-8683, Option 1 to place the order. When ordering, you will need to have 2 – 4GB thumb drives; 1 for the ExpressVote and 1 for the Election Qualification (EQC), to be delivered to Election Services for the programming of your upcoming election.
 - **Note: If the appropriate number of media has not been received an order will be placed for the purchase of 2 thumb drives on your behalf.**
- ExpressVote Activation Card Stock: Select **Yes** if you require ExpressVote Cardstock.
- Shipping and Contacts
 - If a new contact is needed, select Add Contact, do not edit an existing contact with a new contacts information.

- **Copy Form** – becomes available once the PEQ has been submitted. When you select this box, you can choose from which election you want to copy from and then which forms. You can access this button more than once to select different elections and forms to copy forward to the election you're working on.

- **Precinct List** – It is suggested to copy your precinct list from a prior election, and then to make edits accordingly.
 - If a second ballot is needed, contact Customer Support at 877-377-8683, Option 6 or customersupport@essvote.com to update this form for you, include the name to be listed.

- **Contest & Candidates**
 - All races are to be entered separately as a unique code is assigned to the race. I.e., Board of Trustee.
 - If you do not have any Contests on your ballot, Submit form blank.

- **Questions & Referenda**
 - ALL Questions/Referenda must be entered in the Portal separately as a unique code is assigned.
 - If you do not have any Questions/Referenda on your ballot, Submit form blank.

- **Ballot Assignment Chart**
 - You must still SUBMIT this form so a  appears next to it in the list of Service Forms.

- **Layout Signoff**
 - Proofs will be provided via email.
 - **Ballot Change Requests** must be provided via email to your Election Services Associate.
 - Submit this form once you are ready to approve/signoff on your proofs.

- **Pronunciation Guide**
 - If you are providing pronunciations (I.e., Candidate name or School name), complete this form.
 - If you decide to not provide pronunciations, and the Pronunciation Guide is still on your list of forms, please notify Customer Support.

- **Programming Form -**
 - Polling Place Information
 - If another Polling Place is needed, add the polling place using  on the Polling Place information tab.
- For **ExpressVote** users, your Polling Place Information should look like this:




ID	Polling Place Name	Polling Place Type	Reporting Group	Precinct Count	ExpressVote Sticks	ExpressVote Spare Sticks	Summary Total of Media	View
0001	ExpressVote	Election Day	Election Day	ALL	1	0	1	View
Totals:					1	0	1	
Number of Qualification Sticks:							1	
Grand Total:							2	

If your media quantities exceed the number of sticks being returned, are you ok with ES&S using rental media to burn the remaining Media?*

Yes
 No

- **ExpressVote Activation Card**
 - If you need to order the ExpressVote Activation Cards for the election, you will complete this form. This is specific stock you must have to use the ExpressVote. You may check with your County to see if they will be providing some with the machine. If not, you will place a Blank Cards order for 14" cards in increments of 250.
 - If you are not ordering, please email customersupport@essvote.com to cancel out the form.

***If you no longer need our services for the 5/7/2024 Election, contact Customer Support at 877-377-8683, Option 6 or customersupport@essvote.com advising the Election is Cancelled. *