



[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)-** **This form has been completed on your behalf for the 05/02/2023 Election.**
 - 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
 - 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 are needing 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 you upcoming election.
 - **Note:** If the appropriate number of media has not been received by **3/31/2023**, an order will be placed for the purchase of 2 thumb drives on your behalf.
 - ES&S Services Requested
 - The system is preset with the services ES&S will complete for you, please review and contact Customer Support at 877-377-8683, Option 6 or customersupport@essvote.com if any changes are necessary.
 - Paper Ballot Layout and Tabulation – If using ExpressVote Only, select YES. The Contest and Candidates, Questions and Referenda, Ballot Assignment Chart and Programming forms will populate to be Submitted.
 - ExpressVote Activation Card Stock: This has been set to YES so if you will need to purchase Card Stock for use this election, the form is available.
 - If you need Printed ballots, please contact Customer Support at 877-377-8683, Option 6 or customersupport@essvote.com for further information.

- 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** - **This form has been completed on your behalf for the 05/02/2023 Election.**
 - 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 in 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.
 - Add Pronunciation of "NA" if you are not providing pronunciations and submit.
- **Programming Form** - **This form has been completed on your behalf for the 05/02/2023 Election.**
 - Polling Place Information
 - If another Polling Place 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.
- **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 by 03/31, contact Customer Support at 877-377-8683, Option 6 or customersupport@essvote.com advising the Election is Cancelled.