Background

The 2015 Legislature passed HB 400, which required that counties provide the option for individuals with certain disabilities to use an electronic system for voting.

Most voters will use a system called the Electronic Ballot Request System, or EBRS, which is similar to the Electronic Absentee System (EAS) that is already in place for absent active duty and overseas voters.

However, other voters with disabilities may instead request a fillable PDF ballot directly from the county election office. **These instructions cover the process for election officials to create a fillable PDF ballot.**

Instructions on handling ballots that are cast electronically can be found in ARM 44.3.116.

The Secretary of State's Office is available for assistance with creating fillable ballots. For assistance, email soselections@mt.gov or call (406) 444-9608.

Requirements for Creating a Fillable PDF Ballot

- Final ballot in PDF
- Adobe Acrobat Pro or DC

Opening and Extracting PDF Ballot Pages

1) Open Adobe Acrobat. (**Note:** Clicking on Adobe Reader will not allow you to edit the PDF ballot; you must have Adobe Acrobat in order to edit PDFs.)

Opening and Extracting PDF Ballot Pages

2) Determine which ballot the elector will need to receive while in Adobe Acrobat, select File-Open to open the PDF document that contains that ballot.

If the ballot is in a document with other ballots, you will need to first extract the ballot pages that you need. *As shown in the first screen shot below*, click on **Tools**, then click on **Organize Pages**. Choose the page or pages you wish to extract. To choose multiple pages, hold down the CTRL key and click on the pages you wish to choose. *In the second screen shot below*, the first two ballot pages have been selected.
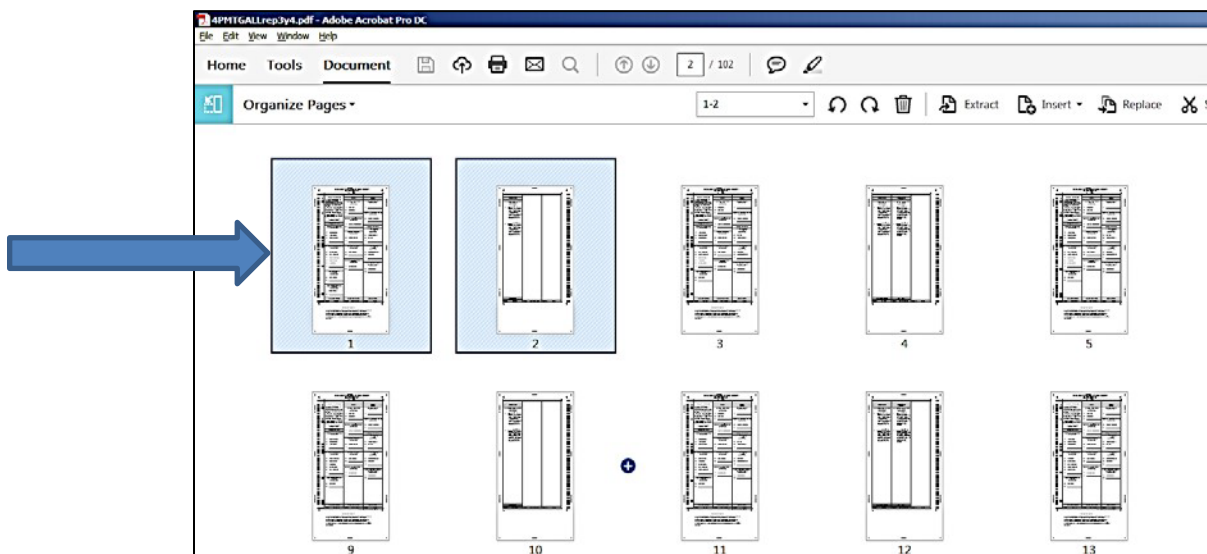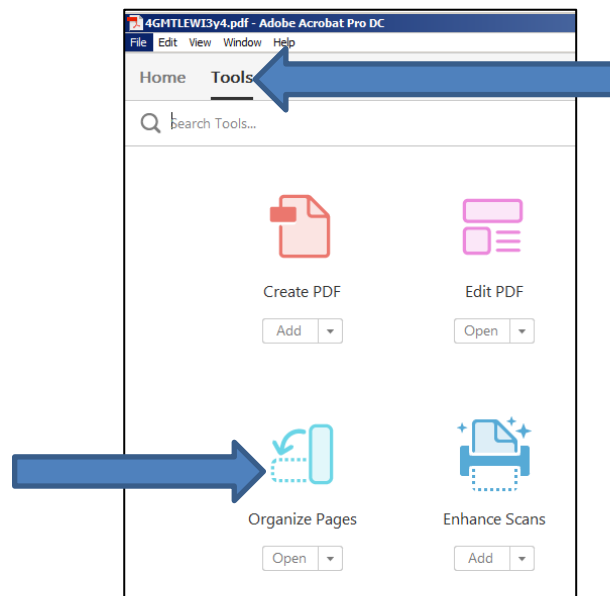
Opening and Extracting PDF Ballot Pages

After you have selected the ballot pages that you wish to extract, right click and choose **Extract Pages**, *as shown in the first screen shot below*.

When the menu in the *second screen shot below* comes up, choose to Extract the pages and then click on the Extract button as shown (leave the boxes unchecked for "Delete pages after extracting" and "Extract pages as separate files"), and save the PDF.
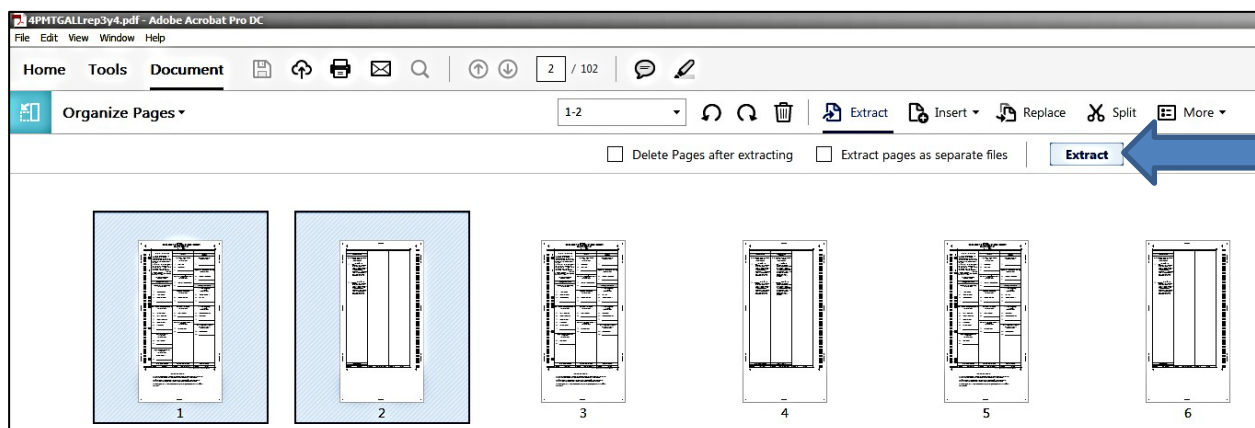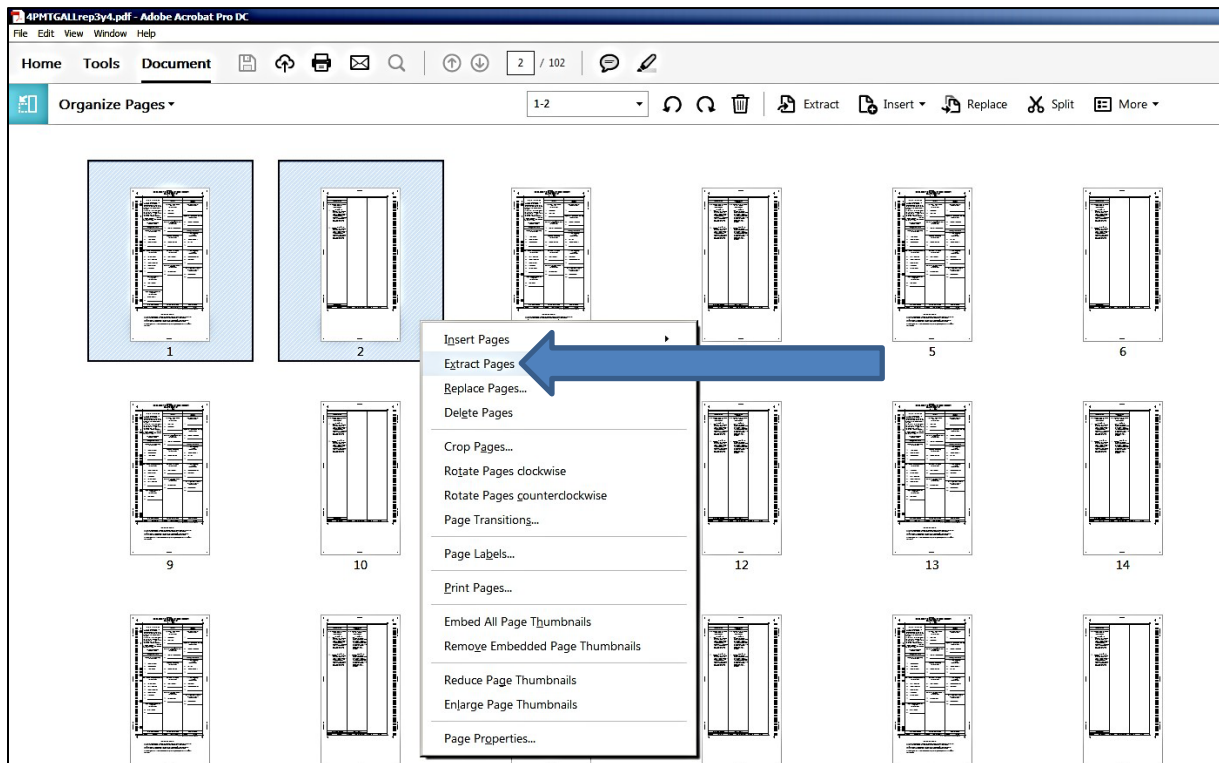
Formatting PDF Ballot

3) Now you are ready to add fields. If the document with the ballot pages that you extracted is not already open, open the document.

   Click on **Tools**, then click on the **Prepare Form** option from the menu on the right side of the screen. ***See first screen shot below for the location of the "Prepare Form" option.*** (When the option to select a file comes up, just click Start, and choose Save at the popup menu.)

   Adobe will automatically add various fields in the document, all of which you will need to remove: to choose all the fields, click on CTRL-A or click on Edit-Select All to select all of these automatic fields, then hit the Delete key.

   There should be a menu on the right side of the screen. ***See second screen shot below.*** On that menu, there is an option named "Fields." Choose the icon to the right of "Fields" and then choose "**Order Tabs by Column**." Now you are ready to start adding fields.
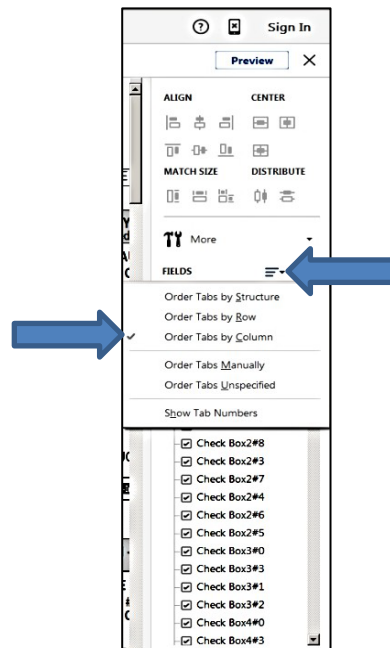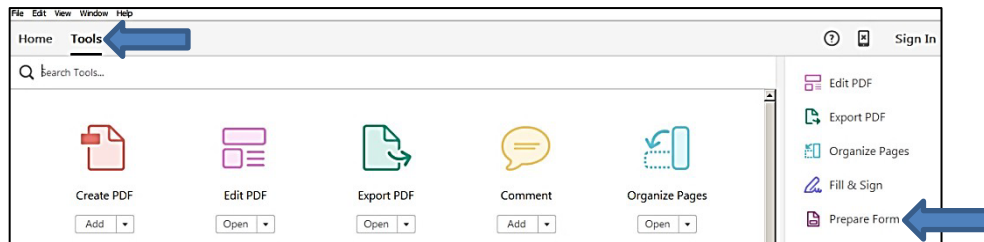
Adding **Check Box** Fields to PDF Ballot

4) To add check box fields to the ovals, begin with the first office on the ballot. Put your cursor over the oval next to the first candidate's name, and right click and choose to insert a Check Box. ***See the screen shot to the left below.*** Center the Check Box over the first oval and leave the field name as is. Hover your cursor over a corner of the Check Box and left click and hold in order to enlarge the check box – the Check Box must be enlarged in order to fully cover the oval underneath. Click in the center of the check box to and left click and hold in order to move the check box so that it fully covers the associated oval.

Next, hover your cursor over the check box that you just inserted, and right click and choose **Properties**. Click on the **Options** tab and in the Check Box Style choose to make it a Circle. ***See screen shot to the right below.***
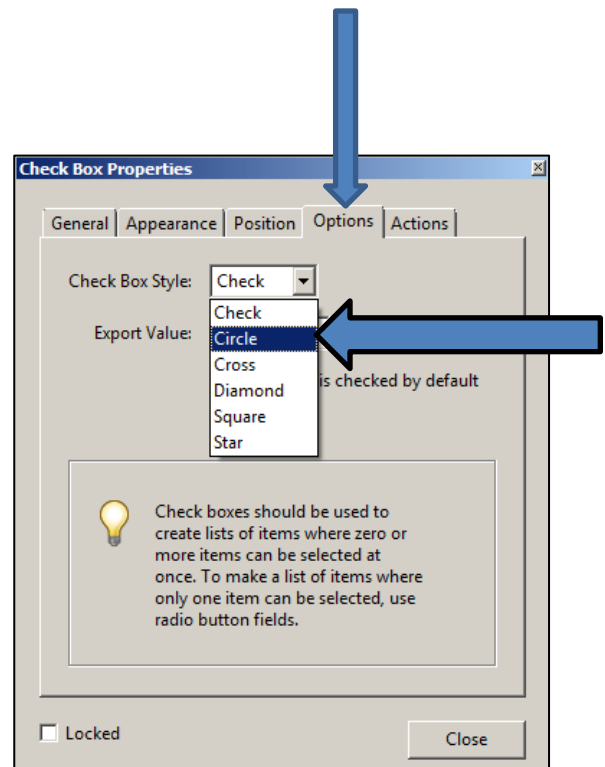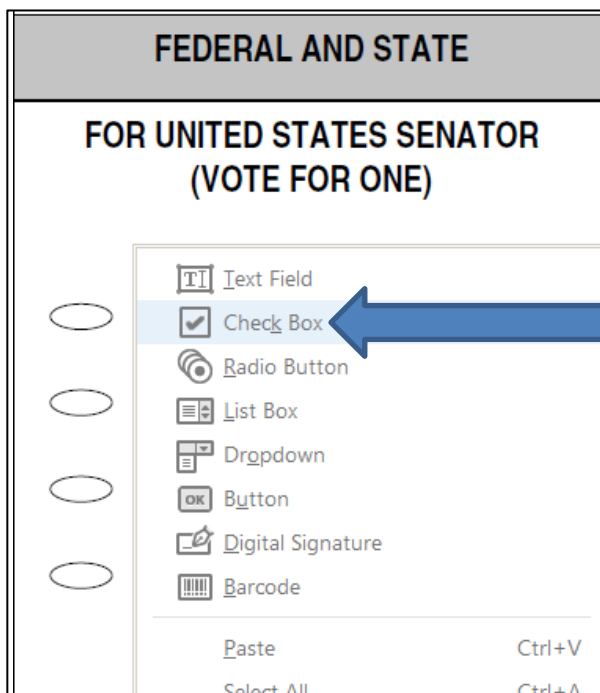
Adding **Check Box** Fields to PDF Ballot

5) To preview how the Check Box will look and confirm that it is in the correct location, choose **Preview** near the upper right-hand corner of the screen. ***See screen shot below***.

To clear the form after previewing it and making any data entry, choose **More** from near the middle of the menu on the left side of the screen, and click on **Clear Form** to remove all the data. ***See screen shot below.***

Revising Check Box Fields on PDF Ballot

6) To exit Preview, choose Edit (from the same location as the Preview option was in).

Once you are satisfied with the check box size and location, right click it and choose Copy, and then right click and choose Paste, and click on the center of the new check box you just created and drag it over the next oval. Repeat this for all ovals in that race, including the write-in oval. Use the same check box name/number for each check box in the race. *See screen shot on the left below, which shows that all the check box names are the same, for example: "1".* (For other races, you will change the check box name to a different number.)

To left-align all of the boxes with each other, choose all of them (by clicking on the first one, then by clicking and holding down CTRL while you click on each of the other ones) and right click, and choose Align, Distribute, or Center, then Align Left. *See screen shot to the right below.* If needed, you can then use the arrows to move all of the check boxes at once so that they each cover the associated ovals. (Once you have finished adding a column of check boxes to various races, you may want to left-align all the boxes in the column again.)

Note that all of the check box numbers for this race are the same as each other; you can also use names such as "Check Box 1"
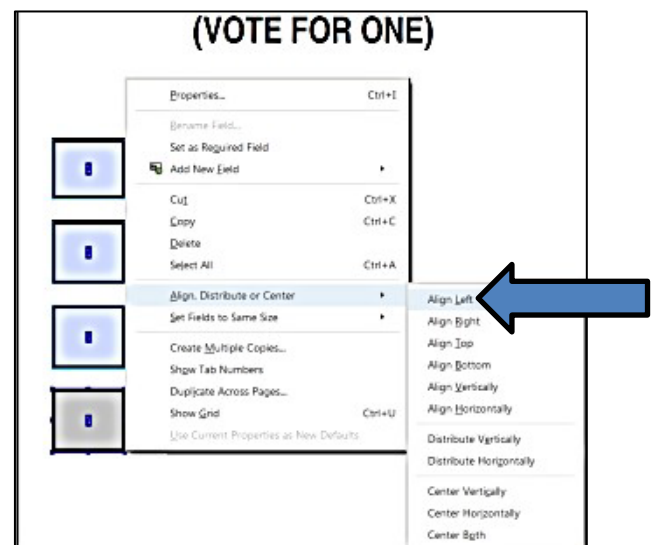
Revising Check Box Fields on PDF Ballot

7) If you choose **Preview** and click on one of the boxes, you will see that if a voter clicks on any one check box in a race, all boxes for that race will automatically fill in, as if the voter had chosen to vote for every candidate in the race.

To fix this, hover your mouse over the original check box, right click, and choose **Properties**, and in the Options tab in the **Export Value** box to change the value from "Yes" to the number "1". Do the same for the next check box in the same race but choose an Export Value of "2". ***See screen shot below.***

Repeat this for each check box in a race, including the write-in check box, increasing the Export Value by one each time. (For each subsequent race, you should start over with Export Values of 1, 2, 3, etc.)

Changing the Export Value will allow the voter to choose any option, but not more than one option at the same time. This will allow the voter to select a choice, then deselect that choice and not vote in the race at all.
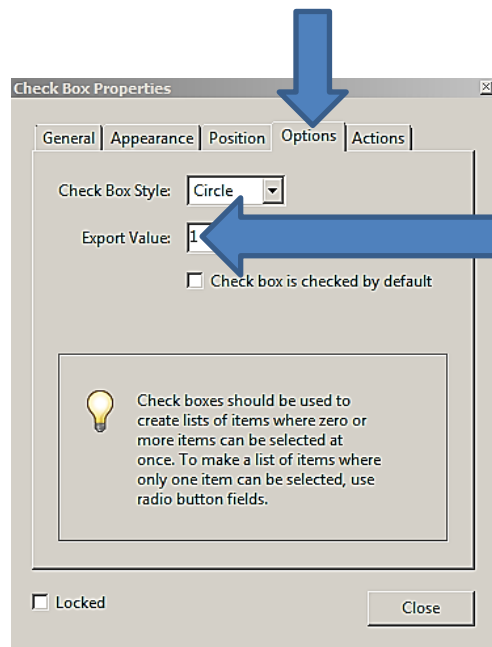
Within each race, you will need to increase each candidate's check box Export Value number in order to ensure that voters are able to choose only one candidate.

Adding **Check Box** Fields to PDF Ballot

8) To put check boxes over the ovals on the rest of the races on the ballot, confirm that the original box is wide and tall enough to completely cover the oval. Copy and paste the original box to make a single new box for the new race. You will need to right-click and rename the new box with a name such as "CheckBox2" so that it does not unintentionally link to the check boxes in the prior race.

Copy and paste the check box over the rest of the ovals in the race. Leave each check box name as "2" or whatever name you chose for the first oval in this race. Do steps 5, 6, and 7 above, making sure to change the Export Values of each check box in a race as noted above.

For instances in which a voter can vote for more than one candidate for an office, you can use check box numbers such as 10a and 10b rather than just 10.

Repeat the above actions for the rest of the ovals on the ballot, making sure that the check box name is the same within a race, but that each race has a different check box name than the other races. ***See screen shot below.***

Note that the check box names for the first race are all **"1"**, but the check box names for the second race are all **"2"**. If you instead leave various races' check box names the same, any choice in one race will inadvertently populate to all other races whose fields have the same name.

Adding **Write-in** Fields to PDF Ballot

9) To allow voters to write in candidates, hover your mouse over the first write-in line and right click. Choose **Text Field**. Place the text field over the write-in line. To size the box width or height, hover your mouse on the top or right side of the box until you see the sizing icon, and then left click and drag so that the box fits the width of the write-in line and height of the text box.

Preview the write-in line by clicking on **Preview** near the upper-right corner. Type in a name in the write-in field. You will notice that if the name is longer than the field can hold, the field will not accommodate this. To fix this problem with the field length, choose **Edit** (from the same location as the Preview box was in), and right click on the write-in text box. Choose **Properties**, then click on the **Appearance** tab, and choose a font size of Auto. Choosing this option will make it so that if a voter types in a long write-in name, the size of the font will decrease proportionately in order to allow the entire write-in name to be seen and to appear on the printed ballot.

Copy and paste the first write-in text box to the next write-in line. You will need to change the name of each text box by right clicking and choosing **Rename Field. *See screen shot below.*** Otherwise, when the voter fills in the first write-in text box, all the other text boxes with the same name will automatically fill in with the same information. If you have more than one write-in line within a single race due to the voter being able to vote for more than one candidate in that race, you will need to name each write-in text box with a different name so that a voter can write in and vote for more than one write-in candidate.

Steps for Adding Vote for Two (or More) Fields to PDF Ballot

10) To allow for situations in which voters can cast a ballot for more than one candidate in a race, you will need to change the name of the check boxes within that race.

For example, if there is a Vote for Two in a Commissioner race, and that races' check boxes are all named "**5**", you can instead re-name them "**5a**", "**5b**", and "**5c**". *See first screen shot below.* Naming the race's check boxes with different names will allow voters to cast more than one vote in the races – *see second screen shot below* (but will not unfortunately prevent them from casting more votes than are allowed).

FOR COUNTY COMMISSIONER
DISTRICT 1
(VOTE FOR UP TO TWO)

5a	BARB BLUM
5b	DON SEIFERT
5c	Write-In-Field-5c
5d	Write-In-Field-5d

FOR COUNTY COMMISSIONER
DISTRICT 1
(VOTE FOR UP TO TWO)

☐ BARB BLUM

☐ DON SEIFERT

● John Doe

● Jane Doe

Steps for **Testing** the Fillable PDF Ballot

11) You should always test the fillable PDF ballot before sending it to a voter.

To test the fillable PDF ballot, first, choose **Preview** from near the upper right-hand corner of the screen. Starting with the first race, click on the box next to each candidate's name. As you click on the second name, the circle should move from the first candidate to the second candidate.

Once you have clicked on the write-in candidate check box and have typed into the write-in field to test that it is working correctly, unclick the check box to verify that a voter could make a choice, unselect that choice, and choose not to vote in the race.

Also, verify that the fields are large enough to cover the associated oval, the write-in lines are placed correctly, and that you have added fields to the reverse side and/or second sheet, if applicable.

For any <u>Vote for Two</u> or more races, ensure that the form allows the voter to select more than one candidate in a race.

Next, save the ballot and send it to another employee for the employee to test it.

See the next page of these instructions for Helpful Tips, and the final two pages of these instructions for examples of fillable PDF ballots. After testing is complete, remove all the data that was entered and save and email the ballot to the voter with a disability.

Helpful Tips:

1) You should use **check boxes with circles** in them to approximate ovals.

2) When you create fields, **make the oval fields large**, especially since the fields may not end up being as large as expected when you review the final form.

3) **To select an entire column of the same fields**, select the first oval field, and then hover your cursor on the last oval field in the column and hit the Shift key to select all the oval fields in that column. Selecting an entire column of the same fields may help to size them, move them, and align them more easily.

4) To **align fields**, choose the fields, then right click and choose **Align, Distribute or Center** and then choose **Align Left**.

5) As you preview the form and enter sample data and if you'd like to remove the sample data, you can use the menu: **on the right of the Prepare Form screen choose More, then Clear Form**.

6) Often, it may be hard to select the fields to re-size them because the fields are small. If this is the case, **use the View-Zoom feature to zoom in** and make the fields appear larger, and therefore easier to work with.

7) As recommended above, you will need to **save each race's fields with a different name than other races' fields**. For example, all the oval fields in the Presidential race will need to have the same name, but the oval fields in the U.S. Representative race will need to have the same name as each other but a different name than the ovals in the Presidential race. The best way to name the fields is to use a consecutive number.

Sample Fillable PDF Ballot

INSTRUCTIONS TO VOTERS

1. TO VOTE, BLACKEN (⬤) THE OVAL COMPLETELY. An oval blackened completely to the left of the candidate or ballot issue choice indicates a vote for that candidate or a vote on the ballot issue.

2. To write in a name, blacken the oval to the left of the line provided, and write in the name (or affix a pre-printed label) in the blank space(s) for the write-in candidate(s) for whom you wish to vote.

3. DO NOT CROSS OUT. If you make a mistake or change your mind, exchange your ballot for a new one.

**VOTE IN ALL COLUMNS
VOTE BOTH SIDES**

FEDERAL AND STATE

FOR UNITED STATES SENATOR
(VOTE FOR ONE)

☐ SUSAN CUNDIFF

☐ STEVE DAINES

☐ CHAMP EDMUNDS

☐ _____

FOR UNITED STATES REPRESENTATIVE
(VOTE FOR ONE)

☐ ELSIE ARNTZEN

☐ MATT ROSENDALE

☐ COREY STAPLETON

☐ DREW TURIANO

☐ RYAN ZINKE

☐ _____

**FOR STATE SENATOR
DISTRICT 30**
(VOTE FOR ONE)

☐ NELS SWANDAL

☐ _____

**FOR STATE REPRESENTATIVE
DISTRICT 59**
(VOTE FOR ONE)

☐ ALAN REDFIELD

☐ _____

COUNTY

**FOR COUNTY COMMISSIONER
DISTRICT 1**
(VOTE FOR UP TO TWO)

☐ BARB BLUM

☐ DON SEIFERT

☐ _____

☐ _____

**FOR COUNTY CLERK & RECORDER /
SURVEYOR**
(VOTE FOR ONE)

☐ CHARLOTTE MILLER MILLS

☐ _____

FOR SHERIFF/CORONER
(VOTE FOR ONE)

☐ BRIAN M. GOOTKIN

☐ _____

FOR COUNTY ATTORNEY
(VOTE FOR ONE)

☐ MARTY LAMBERT

☐ _____

**FOR COUNTY SUPERINTENDENT OF
SCHOOLS**
(VOTE FOR ONE)

☐ LAURA AXTMAN

☐ _____

COUNTY
(Continued)

FOR COUNTY AUDITOR
(VOTE FOR ONE)

☐ _____

FOR COUNTY TREASURER/ASSESSOR
(VOTE FOR ONE)

☐ KIMBERLY BUCHANAN

☐ _____

NONPARTISAN - STATE

**FOR SUPREME COURT
JUSTICE #1**
(VOTE FOR ONE)

☐ W. DAVID HERBERT

☐ JIM RICE

☐ _____

**FOR SUPREME COURT
JUSTICE #2**
(VOTE FOR ONE)

☐ LAWRENCE VANDYKE

☐ MIKE WHEAT

☐ _____

**FOR DISTRICT COURT JUDGE
DISTRICT 18, DEPT. 2**
(VOTE FOR ONE)

☐ MIKE SALVAGNI

☐ _____

Sample Fillable PDF Ballot **Coding**

Note that the check box numbers for the first race are all **1**, but the check box numbers for the second race are all **2**. If you leave all races' check box names the same, any choice in one race will inadvertently populate to all other races.

INSTRUCTIONS TO VOTERS

1. TO VOTE, BLACKEN (⬤) THE OVAL COMPLETELY. An oval blackened completely to the left of the candidate or ballot issue choice indicates a vote for that candidate or a vote on the ballot issue.

2. To write in a name, blacken the oval to the left of the line provided, and write in the name (or affix a pre-printed label) in the blank space(s) for the write-in candidate(s) for whom you wish to vote.

3. DO NOT CROSS OUT. If you make a mistake or change your mind, exchange your ballot for a new one.

**VOTE IN ALL COLUMNS
VOTE BOTH SIDES**

FEDERAL AND STATE

FOR UNITED STATES SENATOR
(VOTE FOR ONE)

|1| SUSAN CUNDIFF
|1| STEVE DAINES
|1| CHAMP EDMUNDS
|1| Write-In-Field-1

FOR UNITED STATES REPRESENTATIVE
(VOTE FOR ONE)

|2| ELSIE ARNTZEN
|2| MATT ROSENDALE
|2| COREY STAPLETON
|2| DREW TURIANO
|2| RYAN ZINKE
|2| Write-In-Field-2

**FOR STATE SENATOR
DISTRICT 30**
(VOTE FOR ONE)

|3| NELS SWANDAL
|3| Write-In-Field-3

**FOR STATE REPRESENTATIVE
DISTRICT 59**
(VOTE FOR ONE)

|4| ALAN REDFIELD
|4| Write-In-Field-4

COUNTY

**FOR COUNTY COMMISSIONER
DISTRICT 1**
(VOTE FOR UP TO TWO)

|5a| BARB BLUM
|5b| DON SEIFERT
|5c| Write-In-Field-5c
|5d| Write-In-Field-5d

**FOR COUNTY CLERK & RECORDER /
SURVEYOR**
(VOTE FOR ONE)

|6| CHARLOTTE MILLER MILLS
|6| Write-In-Field-6

FOR SHERIFF/CORONER
(VOTE FOR ONE)

|7| BRIAN M. GOOTKIN
|7| Write-In-Field-7

FOR COUNTY ATTORNEY
(VOTE FOR ONE)

|8| MARTY LAMBERT
|8| Write-In-Field-8

**FOR COUNTY SUPERINTENDENT OF
SCHOOLS**
(VOTE FOR ONE)

|9| LAURA AXTMAN
|9| Write-In-Field-9

COUNTY
(Continued)

FOR COUNTY AUDITOR
(VOTE FOR ONE)

|10| Write-In-Field-10

FOR COUNTY TREASURER/ASSESSOR
(VOTE FOR ONE)

|11| KIMBERLY BUCHANAN
|11| Write-In-Field-11

NONPARTISAN - STATE

**FOR SUPREME COURT
JUSTICE #1**
(VOTE FOR ONE)

|12| W. DAVID HERBERT
|12| JIM RICE
|12| Write-In-Field-12

**FOR SUPREME COURT
JUSTICE #2**
(VOTE FOR ONE)

|13| LAWRENCE VANDYKE
|13| MIKE WHEAT
|13| Write-In-Field-13

**FOR DISTRICT COURT JUDGE
DISTRICT 18, DEPT. 2**
(VOTE FOR ONE)

|14| MIKE SALVAGNI
|14| Write-In-Field-14