

1. Goto osr.ashrae.org and log in the right hand corner if not already logged in the www.ashrae.org site.
2. To create a ballot hover over the Balloting Tab and chose Create Ballot.
3. The Create Ballot form will appear. Type in the motion (i.e. Do you approve DA-17 for publication public review? Do you approve the interpretation as shown in the attachment? Do you approve the minutes) and chose the motion type. Types include Standards Action (public review), Interpretations, or Other (minutes/strawpolls). If it is a vote for publication with knowledge of unresolved objectors than click the box. If the vote was started at a meeting and it is a continuation ballot enter the date otherwise leave blank. Choose your ballot length (should not be shorter than 7 days). In the drop down menu choose the Committee for which you are the Chair (or designated in the Chair role) and chose the base standard. Insert any relevant back ground material related to the motion. If there are attachments then choose attachment to upload. When finished select save and post ballot (if you need to come back to edit select save draft.).
4. The next screen will bring you to the Edit Ballot screen. On this screen you will see a list of all project committee voting members. If a vote was taken at the meeting then you can enter the recorded votes including negative vote with reason for members in attendance. This page also allows you to close the ballot early if all ballots have been submitted.
5. To add a negative vote with reason chose N for the no and then click on the comments button. This will open up a free form box for you to enter the reason for negative vote. Once completed click the Save Votes at the bottom of the screen.
6. When the comments button is clicked it opens a box for the reason but also opens a response box for the Chair (or designee) to enter a written disposition to why the committee was not persuaded by the negative vote with reason. This can be completed during the ballot, during recirculation but must occur prior to the vote for publication with knowledge of unresolved objectors. Attachments can be added.
7. Once the votes have been saved you will see the following message on the screen.
8. Once the ballot closes the system will send out a notice indicating if the motion passed, failed (other ballots don't require recirculation) or passed pending recirculation results. If the motion passes pending recirculation results the Chair will need to issue a recirculation ballot.
9. The next time you log in the system the Dashboard will indicate areas where actions are needed. If a Recirculation is Required then a number in red will appear under the My Committee Ballots. Click on the Recirculation Required Link. (Or you can chose My Ballots under the Balloting Tab and see all ballots and what stage the ballot is in.) Click on the Manage Recirculation Link to access the ballot.

10. After clicking on Manage Recirculation you will be brought back to the ballot. You will need to indicate the Recirculation Ballot Period. Additional attachments may be added and responses to negative votes (as indicated above) can also be added. The Chair can also expand on the background. Once satisfied with the ballot click the Recirculate Ballot Button. (You will notice that any item with reasons included will have an open envelope next to the comments button).
11. Once the ballot closes all members (voting and non-voting members) will receive a notification of the numerical results of the final ballot. Members will need to log in to read any negative votes with reason and see how each member voted.
12. After ballots have close you may also go to the online comment database and run reports on any ballot. To access ballot reports from the dashboard/home screen from the balloting dropdown choose ballot report. You can sort just by committee or any combination of the dropdowns below. Once you have completed the filters click on refresh report.
13. After selecting RefreshReport a report will appear (could be multiple ballots or just one) at the bottom of the screen. This details the vote.
14. At the top of the Ballot Report is the option to print or download the report by choosing the download arrow or print. Reports can be downloaded in pdf, csv, excel, html, or word.