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January 8, 2010

County Clerk/Registrar of Voters (CC/ROV) Memorandum # 10013

TO: All County Clerks/Registrars of Voters

FROM:

A handwritten signature in black ink, appearing to read "Robbie Anderson".

Robbie Anderson  
Elections Counsel

RE: Publication: Draft Poll Worker Training Standards

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The Secretary of State's office has drafted an update to the Poll Worker Training Standards (formally guidelines) that were published in April 2006. We would like to thank Alameda, Fresno, Kings, Los Angeles, Orange, San Diego, Santa Clara, Santa Cruz, Solano, and Sonoma counties for participating in the Poll Worker Training Standards working group.

We have incorporated the working group's comments in this new draft and have also attempted to incorporate information from lessons learned in past elections and recent changes in the Elections Code.

It is our goal to have these new Poll Worker Training Standards finalized by early February. Given this goal we are requesting to have your comments on this draft to us by Monday, January 25, 2010. Please direct your written comments to me at [robbie.anderson@sos.ca.gov](mailto:robbie.anderson@sos.ca.gov). Thank you for your help.

Attachment

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## **Introduction**

Being a poll worker is an important and challenging job. There are many rules and regulations that must be followed on Election Day. Given the state's diversity – among people, geography, voting systems and more – training methods will vary by county, but the information provided in these standards will help elections officials instruct their poll workers on how to best perform their duties.

These standards do not replace county poll worker training materials or resources. They are intended to provide elections officials with the information needed to provide instruction and written materials to their poll workers.

Moreover, the organization of these standards is not meant to be prescriptive. Elections officials may present the information in the order or format that works best for their poll worker training sessions.

These 2010 revised standards reflect lessons learned and changes in state law that have taken effect since the original standards publication in 2006. These standards will be improved and supplemented in the future, as every election provides new opportunities to learn and improve skills as elections officials.

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**Section 1: Ensuring and Protecting the Rights of Every Voter**

Poll worker training should include an overview of the mission and role of the poll worker, which is to assist every qualified voter to cast a ballot and to ensure each ballot is safely secured until it can be counted. This requires the poll worker to provide a positive voting experience and ensure the rights of everyone seeking to vote are protected. Poll workers should be trained with a customer service mentality in a fashion that makes their voters' experience as positive as possible. To fulfill that role, poll workers should be familiar with the rights of voters, be trained in cultural sensitivity, know how and when to assist voters with disabilities or other specific needs, and know their responsibilities and the limits to their authority. These four areas of knowledge are discussed independently below, but are components that should be integrated in the overall mandate of ensuring the rights of voters are protected, respected, and valued.

**A. Poll Workers Should Know the Rights of Voters**

All poll worker training should include a review of the rights of voters.

**1. General Rights**

**Right to Cast a Ballot**

- Every valid registered voter has a right to cast a ballot. A valid registered voter is a United States citizen who is a resident of California, is at least 18 years old, is not in prison or on parole for conviction of a felony, is not judged by a court to be mentally incompetent, and who is registered to vote at his or her current residence address. (California Elections Code § 2300(a)(1))<sup>\*</sup>
- A voter has the right to cast a secret ballot free from intimidation. Poll workers should be trained to watch for and address any form of intimidation, which includes electioneering activities (see Section 3 of these standards). Poll workers should also provide voters with disabilities, or any voter requiring assistance, the same opportunity for privacy when marking their ballots as all other voters. (§§ 2300(a)(4), 18540, California Constitution, article II, § 7)
- Poll workers must be trained about the right of voters to cast a ballot if they are in line at the polling place when the polls close at 8:00 p.m. Voters who are in line at the polling place at the time polls close are entitled to vote and must be allowed to exercise that right. (§§ 2300(a)(3), 14401, 14402)

**Rights of Voters Who are Required to Provide Identification**

- Under federal law, first-time voters who registered by mail may be required to show identification to vote. The voter roster should clearly identify who should be asked to provide identification. (Section 303 of the Help America Vote Act of 2002 (HAVA); United States Code, Title 42, § 15483(b))
- Poll workers may only ask a voter to provide identification if the voter roster explicitly states identification is required because the voter is a new voter who mailed in a voter registration form without identification. When asking for identification, the poll workers should know which forms of identification are

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<sup>\*</sup> All references are to the California Elections Code, unless otherwise specified.

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acceptable and that a photo identification is not required, but is simply one of several acceptable forms of identification. Poll workers should also be instructed that a photo identification need not contain the voter's address and need not be issued by a government agency to be adequate for purposes of establishing identity for voting purposes. Poll workers should be provided with a list of examples of acceptable forms of identification as listed in Section 20107 of the California Code of Regulations (2 CCR 20107).

- Poll workers should explain to voters why they, and not all voters, are being asked to show identification.
- Poll workers should clearly explain that if a voter who is required to provide identification does not have any acceptable form of identification or does not wish to provide identification for any reason, the voter may cast a provisional ballot and should be politely offered one. (2 CCR 20107)

### **Rights of Voters Who Are Not Registered with a Qualified Political Party**

- Poll workers should have a thorough understanding of the rights and options of voters are not registered with a qualified political party but are registered as decline-to-state (DTS) voters.
- During a primary election that includes a partisan public office, there should be a nonpartisan ballot and a separate ballot for each qualified political party. (§ 13102(a))
- A political party may adopt a party rule that allows a person who has declined to state a party affiliation to vote the ballot of that political party in the partisan primary election. (§ 13102(c))
- If a voter has declined to state a party affiliation, or is registered with a nonqualified party, the voter shall be given a nonpartisan ballot. However, a DTS voter is entitled to a ballot of a political party that has authorized DTS voters to vote the ballot of that political party. (§ 13102(b))
- County elections officials should train poll workers in the appropriate use and distribution of DTS voter information with materials including, but not limited to, signs, posters, and written information, to inform these "crossover voters" that they may request a ballot of a political party that has authorized a DTS voter to vote the ballot of that political party. A crossover voter is a voter who has chosen not to be affiliated with a qualified political party, but "crosses over" to another party that authorizes them to cast a ballot of their party for a particular election. The poll worker should provide information to the DTS voter in a way that avoids any advocacy towards a particular party's ballot.
- County elections officials should train poll workers on how to properly record which political party's ballot was requested or whether a nonpartisan ballot was requested by each DTS voter. (§ 13102(d))
- When training poll workers for a primary election, poll workers should be reminded that the ballot options available for voters who are not registered with a

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political party can change with each election, so they should rely only on the most current information.

- It is important for trainers to clearly distinguish between ballots for qualified political parties and nonpartisan ballots.

### **Right to a Provisional Ballot**

- If a voter requests a provisional ballot, or may be registered to vote despite not being listed on the voter roster, the voter may cast a provisional ballot and must be told how to find out if the ballot was ultimately counted, and if not, why not. In poll worker training, emphasis should be placed on checking supplemental rosters to ensure voters are not being unnecessarily required to cast provisional ballots. A voter should be given the benefit of the doubt when claiming to be properly registered and at the correct polling place. It is ultimately the duty of the county elections official to determine the eligibility of voters and viability of provisional ballots. (§§ 2300(a)(2), 14310, 14312)
- A voter who is listed as a vote-by-mail voter, but who does not bring the vote-by-mail ballot to the polls on Election Day, has a right to cast a provisional ballot. (§ 3016)

### **Right to Replace a Spoiled Ballot**

- Poll workers should be aware that a voter has the right to receive a new ballot if, prior to casting a ballot, a voter makes a mistake marking votes. A vote-by-mail voter may also request and receive a new ballot if the voter returns the blank or spoiled vote-by-mail ballot to an elections official before the polls close on Election Day. However, a voter can only receive two replacement ballots. Poll workers should alert a voter who spoils the first ballot that a voter is only entitled to two more replacements and should exercise caution when casting a replacement ballot. (§§ 2300(a)(5), 14288)

### **Right to Instruction on the Use of Voting Equipment**

- A voter has the right to receive instruction on how to cast a ballot using the voting equipment in the polling place. Any person who asks to vote on a direct electronic recording (DRE) machine is entitled to do so. No voter is required to prove a disability or justify the request to use any system in the polling place to cast a ballot. Poll workers should be reminded that not all disabilities are visible. Poll workers should be adequately trained to use all equipment and be available to help voters understand how to use it properly. Furthermore, poll workers should understand the proper procedures and tools available for demonstrating the voting system, including the use of specially marked demonstrator ballots. Each voter who uses a paper ballot should be instructed how to fold the ballot or place it in a secrecy sleeve or folder so the voter's selections are not visible. (§§ 14272, 14275, 14292)

### **Election Day Posting Requirements**

- Poll workers should be informed what materials are to be posted at the polls on Election Day and where each item should be posted. This includes flags (and how to properly hang them and ensure they are easily visible to guide voters to

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the polling place), Voter Bill of Rights posters (which the law requires to be "conspicuously posted both inside and outside every polling place"), updated street indexes, election date and polling place hours, sample ballots for all precincts at the polling place in all required languages, instructions on how to cast a provisional ballot, instructions for mail-in registrants and first-time voters, and information on federal and state laws regarding fraud and misrepresentation (e.g., a sign warning against tampering with voting equipment). (§§ 2300(d)(2), 14105, 14105.3, 14200-14202, 18564)

### **Materials in the Voting Booth**

- State and federal law do not prohibit voters from bringing into the voting booth the Secretary of State's Voter Information Guide, a sample ballot, a copy of the Voter Bill of Rights, or other similar explanatory materials. However, the law does preclude voters from bringing electioneering materials (see Section 3 of these standards) into the voting booth or within 100 feet of the polling place.

### **Right to Report Fraud or Illegal Activity**

- Voters have the right to report any illegal or fraudulent activity at or near the polls to a local elections official or to the Secretary of State's Office. If a poll worker is asked how to report illegal or fraudulent activity, the poll worker should provide the voter with information for doing so. (§ 2300(a)(10))
- A poll worker should further inform a voter of the option of filing a written complaint regarding violation of federal or state election laws. For questions related to HAVA complaints, the voter should be directed to the Secretary of State's office for assistance. The Secretary of State's office may be reached at (916) 657-2166 or [elections@sos.ca.gov](mailto:elections@sos.ca.gov). (United States Code, Title 42, § 15512(a)(2)(C))

## **2. Other Rights Under Certain Circumstances**

Some voters are entitled to additional rights depending on the situation. Poll workers should be accommodating and flexible to ensure these rights are protected, as well.

### **Rights of All Voters to Receive Assistance at Polls**

- Voters who, for any reason, need or want assistance to vote have the right to receive assistance in casting a ballot. A voter can bring one or two people into the voting booth, or the voter may request assistance from a poll worker. Poll workers should be trained in what to do (and what not to do) if asked to assist. For example, it is a violation of state and federal law to disclose how another person votes. (§§ 2300, 14282-14283)

### **Rights of Voters with Disabilities**

- Voters with disabilities have the right to vote privately and independently, the right to receive reasonable modifications, the right to have barriers removed from the voting process, and the right to auxiliary aids and services. At least one accessible voting unit must be available in each polling place where an election is being conducted. (HAVA § 301(a)(3)(B), § 19227(b))

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- Voters with disabilities have the right to an accessible polling place, and every effort should be made to provide these voters with a way to independently and privately cast a ballot. Poll workers should be trained on how to use every voting system that is offered in the polling place and on procedures for curbside voting if the voting system provided at the polling place cannot accommodate the voter. A list of voters who have requested assistance must be maintained and returned to the elections official. (§§ 12280, 14282, 14283)
- Under federal anti-discrimination laws, poll workers must permit a service animal to accompany a blind, deaf, or hard-of-hearing person. Before interacting with any service animal, the owner should be consulted. (Code of Federal Regulations, Title 28, § 35.130(b)(7).
- A person with a disability who is unable to write may use a signature stamp, or authorize another person to use the stamp, on any elections-related document that requires a signature (including a vote-by-mail ballot). A signature stamp affixed to the vote-by-mail envelope is treated in the same manner as a signature made in writing. (§ 354.5)
- All eligible citizens have the right to register to vote unless judicially determined to be incompetent or otherwise ineligible because they are on parole for conviction of a felony. It is not up to poll workers to determine a person's registration qualification or competence to vote. Sometimes poll workers, upon seeing a voter who is disabled, may question the person's competence to vote. Poll workers should be trained to provide the same respectful and courteous level of service to a properly registered voter with a disability as they would to any other voter. No voter who is on the roster is required to show any identification unless they are a first-time voter who registered to via mail and are so noted in the roster, or to prove their competence to receive or cast a ballot. Poll workers should be reminded that if a person's name is not on the roster, they are still entitled to a provisional ballot. (§§ 2000, 2100, California Constitution, article II, § 2, HAVA § 303(a)(5), 2 CCR 21017)
- Voters with disabilities should not be asked or permitted to fill out their ballots at the table where poll workers are checking in voters, even if the voters have requested assistance in filling out their ballots, because the ballot secrecy may be compromised. A separate table should be provided nearby.
- For additional information on assisting voters with disabilities and/or specific needs, see page 6.

### **Rights of Voters with Limited English Proficiency**

- The federal Voting Rights Act provides that in some jurisdictions ballots and election materials must be printed and provided in other languages spoken by voters. Poll workers should be appropriately trained to offer alternate-language ballots, including bringing to the voter's attention to the availability of alternate-language materials. Poll workers should not make any comments regarding voters who ask to use non-English materials. The county elections official may want to provide poll workers with written materials explaining how to

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appropriately offer alternative-language ballots and bring the voter's attention to the availability of alternative-language materials. (§ 12303)

- Voters who, for any reason, need or want assistance to vote have the right to receive assistance in casting a ballot. A voter who is not proficient in English can bring one or two people into the voting booth, or the voter may request assistance from a bilingual poll worker. Poll workers should be trained in how best to communicate with voters who do not speak English or voters who have limited English proficiency. For example, it is a violation of state and federal law to disclose how another person votes. (§§ 2300, 12303)
- Poll workers should also be instructed to respect people from backgrounds different from their own, including those who do not speak English fluently. Poll workers should be reminded that all voters must be treated with the same level of respect and courtesy.
- Voters will generally understand if poll workers are busy, but no voter should have to tolerate rudeness or disrespect, particularly if the inappropriate treatment is aimed at them because of a disability or limited English skills. Voters needing language assistance should not be asked to step aside while other voters are serviced first; all voters should be processed in the order in which they appear to vote.

### **Rights of Voters Accompanied by Children**

- A voter who is accompanied by children below the age of 18 may take the children into the voting booth. (§ 14222)

### **Rights of Vote-by-Mail Voters**

- Every voter has a right to vote by mail and to register as a permanent vote-by-mail voter. (§§ 3001, 3003)
- To be counted, a vote-by-mail ballot must be received by the county elections office or deposited at any polling place in the county by the close of polls on Election Day. The voter or a designated third party may deposit the ballot. Vote-by-mail ballots received after the polls close will not be counted. (§§ 3017(a), 3018, 3020)
- A voter listed as a vote-by-mail voter who wishes to vote at the polling place shall surrender his/her vote-by-mail ballot in exchange for a regular ballot. A voter who does not bring his/her vote-by-mail ballot has a right to vote using a provisional ballot. (§§ 3015, 3016)

### **Rights of Poll Watchers**

- Only poll workers and voters engaged in voting may be within the voting booth area during the time the polls are open. Other people may be in the polling place observing the process as long as they do not interfere with any voter's right to cast a secret ballot or a poll worker's ability to work. Poll workers should be taught how to treat poll watchers, as well as what poll watchers are and are not allowed to do. (§ 14221)

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- Poll workers should be made aware that people have the right to observe the elections process, even if they are not voting. Observers have the right to ask poll workers questions about elections procedures and to receive an answer or be directed to the appropriate official for an answer. However, if persistent questioning disrupts the poll workers' duties, the poll workers can stop responding and direct the observers to the county elections office for further answers.
- Frequently, people visit polling places on Election Day to check the voter street index. These "poll checkers" commonly are people working for campaigns who want to determine which voters have cast their ballots. Poll workers should be provided with instructions on how best to interact with poll checkers. Poll workers should also be trained how to update the voter street indexes and post such information in an accessible location, which is required by law to be completed each hour, up to and including 6:00 p.m. (§ 14294)

### **Rights of News Media and Pollsters**

- Members of the news media and opinion-polling researchers are required to abide by different rules than poll watchers. Clearly identified members of the news media may speak to voters leaving the polling place as long as they do not interrupt voting and are 25 feet from the polling place entrance. However, no voter may be photographed, videotaped, or filmed entering or exiting a polling place, or filmed inside the polling place, without the voter's permission.

### **B. Poll Workers Should Be Trained in Cultural Sensitivity**

Given the great diversity of California's population, poll workers should be instructed to treat voters of all backgrounds with equal respect. Poll workers should be trained on cultural sensitivity – the ability to recognize and respond to cultural concerns and sensitivities of various groups. Poll workers should be made aware of relevant differences between cultures and how the actions of a poll worker may be viewed differently than intended.

#### **Cultural Sensitivity**

- Training should include information about people who speak languages other than English; people from racial or ethnic minorities; people who have physical or mental disabilities; people with low literacy skills; and people who are elderly.

#### **Respect for Differences**

- Poll workers should be taught that everyone in the polling place must be treated with the same respect and provided with the same level of service, regardless of what primary language the voter speaks. Many U.S. citizens speak languages other than English, and in many California counties, federal law requires ballots to be available in languages other than English. When multilingual ballots are available in the jurisdiction, voters should be offered a choice. In addition, any voter, including non-English speaking voters and voters with limited literacy skills, is allowed to bring up to two people to assist with voting. (§ 12303)

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- Poll workers should be encouraged to be considerate and patient, anticipate voters' needs, and offer assistance when possible. For example, when checking in a voter, the poll worker should politely determine how to spell the voter's name. Train poll workers to politely ask voters how to spell their names, assist the voter in finding the name on the roster, provide paper and pen for a voter to write down the name, or, for spelling purposes, accept a voter's offer to show his or her name in print on an identification card or other document. Poll workers may not require proof of identity except under the circumstances outlined in Section A of these standards.
- Poll workers should be instructed to assess the needs of each voter who might need assistance and meet that need in the course of work, rather than treating voters as parts of specific population groups (such as "physically disabled" or "second language").

### **Offering Assistance**

- Sometimes it can be difficult to realize when a voter needs special assistance. Some people may be much more independent than they appear to be. However, poll workers should be trained to not be afraid to ask voters if they need assistance. The poll workers should also be trained to ask voters directly if assistance is needed, regardless of whether the voter has brought an interpreter, companion, or assistant to the polls. Unless the voter indicates otherwise, all communication with the voter should be directed to the voter rather than to any interpreter, companion, or assistant. Eye contact is a sign of respect. The county elections official may want to provide written materials that explain how to appropriately ask voters if assistance is needed.

### **Three Communication Tools: Wait. Recognize. Listen.**

- Poll workers should be instructed to use three tools on Election Day:
  1. Wait – Suppress the instinct to quickly respond or cut off a question. Wait first to process the question, then formulate a reasoned and respectful response.
  2. Recognize – Focus on how to recognize other people's feelings, anticipate their needs, and be sensitive, accommodating, and courteous in assisting them.
  3. Listen – Listen before speaking to understand exactly what the voter is feeling, seeing, needing, and trying to communicate. It is most important to remember to put assumptions aside so poll workers are better able to hear and understand a voter's responses.

### **Voter Privacy**

- Poll workers should be trained to respect a voter's privacy. Voter privacy is not only a courtesy; it is a legal requirement. Training should emphasize the importance of voter confidentiality and clearly detail procedures for handling each ballot to ensure voter anonymity is protected.

### **How and When Poll Workers Should Ask for Help**

- If poll workers find a language or any other barrier interfering with the ability to communicate with a voter, they should be instructed to ask a bilingual poll worker for help or to contact a hotline at the county elections office for assistance.

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County officials should provide such assistance, including the appropriate contact information and the capability to make such contact.

### **Display Materials**

- Poll workers should be trained in how to set up and draw voters' attention to instructional materials, including multilingual materials. A freestanding easel or display board is an effective way to post required notices in one place so voters can easily read them before receiving their ballots, especially in polling places where limited space is available or multiple precinct tables are set up.

### **Removing Insensitive Poll Workers**

- If a poll worker is identified on Election Day as being culturally insensitive or otherwise unsuitable for a particular polling place, that poll worker should be reported to the elections official and immediately relieved of precinct duties.

## **C. Poll Workers Should Be Trained in How and When to Assist Voters with Disabilities or Any Specific Need**

In addition to understanding how to respectfully treat people from different cultures, poll workers should be trained to assist voters with disabilities. Poll workers should understand that all voters have the right to vote privately and independently. It is not up to a poll worker to determine a person's qualification to register or to vote. Poll workers should be trained to provide the same respectful and courteous level of service to a properly registered voter with a disability as they would to any other voter. Voters with disabilities, like every other voter, must be afforded the ability to cast their ballots in private.

### **Access**

- Poll workers should be instructed how to ensure physical access to the polling place for voters with disabilities. This includes installing directional signs outside to help voters identify the most accessible path to get to the polling place and voting equipment. Poll workers should be trained to temporarily modify the interior arrangement of the polling place (tables, chairs, voting booths, etc.) to make it accessible and still ensure voters can cast their ballots in private.
- Poll workers should be instructed that not all polling places are accessible. While federal law requires each polling place to have at least one accessible voting system if federal contests are on the ballot, it is possible some polling places may need to direct voters with disabilities to a nearby accessible polling place. Therefore, poll workers should be prepared to provide voters with disabilities from other precincts the opportunity to cast provisional ballots.

### **Curbside Voting**

- If a polling place is not, and cannot, be made accessible, poll workers should understand the voter has the option to go to an alternative accessible polling place to vote a provisional ballot or to vote curbside. Poll workers should be familiar with the procedures for conducting curbside voting. (§ 14282)

### **Polling Place Set-up**

- Poll workers should be familiar with the proper arrangement of furniture and equipment at a polling place to ensure materials are accessible to all voters and voters with disabilities are able to use equipment independently and privately. Set-up procedures should provide instructions of how to assemble voting booths for use by voters who, for example, use wheelchairs. If precinct supplies include aids such as magnifying sheets for visually impaired voters, pen grips, or signature guides, poll workers should be prepared to offer the aides to voters.
- Many elderly voters and voters with disabilities have difficulty standing in line for any length of time. Also, some voters will need to sit down with audio keypads. If a person asks for a chair, the poll worker should provide it and assist such people with keeping place in line if necessary.

### **Voting System Access**

- Each polling place is required to have at least one accessible voting machine. Poll workers should ensure that voting machines are set up in an accessible manner and, if a machine has auxiliary aids that provide or improve access, be familiar with the proper set-up and use (e.g., magnifying glasses, alternate language selection, audio headsets, tactile controls). Poll workers should be trained on the various ways that a voting machine can be modified, moved, or set up to accommodate individual disability-related access needs. For example, poll workers should be trained to adjust the height and angle of the touch screen to match the most effective range and reach of users with impaired dexterity. (HAVA § 301(a)(3)(B))
- Poll workers should be instructed to, before the polls open, test and practice quickly connecting and removing equipment that provides accessibility for voters with disabilities. Specific suggestions and techniques for improving physical access to voting machines are available in the Accessibility Report on the Secretary of State's website at [www.sos.ca.gov/elections/elections\\_vsr.htm](http://www.sos.ca.gov/elections/elections_vsr.htm).

### **Appropriate Etiquette**

- Poll workers should be taught appropriate etiquette for working with voters with disabilities and, in particular, focus on not treating voters with disabilities as a special group of less-capable voters.
- Poll workers should abide by the following basic tips when working with individuals with disabilities.
  - Use common sense. The majority of people with disabilities want to be treated the same way everyone else is treated. A person is a person first; the disability comes second.
  - Avoid patronizing words or actions. Show the person the same courtesy and respect that you expect to receive from others. Treat adults as adults.

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- Be considerate and patient. Try to anticipate what the person's needs might be and offer assistance when possible. Be patient if the person requires more time to communicate, to walk, or to accomplish various tasks.
- Communicate with the voter. Remember that some people with disabilities may have an assistant, interpreter, or companion with them. It is important to always look and speak directly to the voter rather than to his/her companion. Face the person with a visual impairment when you are talking. If your eyes are directed towards them, your voice will be, too.
- Try to keep the path to the voting booth clear of obstacles. If the polling place is in a building with several routes through it, be sure signs are posted to direct a person to the most accessible path.

### **When working with voters who are blind or visually impaired:**

- Identify yourself as a poll worker as soon as you come in contact with the voter. If guiding a voter who is blind, offer your arm to the voter, rather than taking the voter's arm. When giving verbal directions to help the voter navigate the polling place, be as specific as possible and identify obstacles in the path of travel.
- If the person has a guide dog, walk on the opposite side of the voter away from the dog. Do not pet or otherwise distract a guide dog without permission from the owner. Note: Guide dogs can be any breed or size. If you are unsure, simply ask, "Is this a service animal?"
- Describe what you are doing as you do it. If you are going to leave a person who is blind or visually impaired, let the person know.

### **When working with voters with speech or hearing impairments:**

- Keep in mind a voter who cannot speak can give his or her name and address by simply providing identification to a poll worker. The poll worker is required by law to then read the name and address out loud. (§ 14216)
- Follow the voter's cues to determine whether speaking, gestures, or writing is the most effective method of communication.
- If speaking, speak calmly, slowly, and directly to the voter. Do not shout. Your facial expressions, gestures, and body movements help in understanding. Face the voter at all times.
- Rephrase, rather than repeat, sentences that the voter does not understand.

### **When working with voters with limited mobility:**

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- Do not push or touch a wheelchair without the owner's consent. People using adaptive equipment often consider the equipment as part of personal space.
- Ask before helping. Grabbing someone's elbow may throw the person off balance. A person with mobility impairments might lean on a door while opening it. Quickly opening the door may cause the person to fall.
- Fasten mats and throw rugs securely or move them out of the way to prevent people from tripping.
- Keep floors as dry as possible.
- Keep the ramps and wheelchair-accessible doors to the polling place unlocked and free of clutter.

### **D. Poll Workers Should Know Exactly What Their Responsibilities and Authority Are and the Related Limits**

Poll workers are asked to observe and adhere to complex rules regarding their authority and responsibilities. They are charged with managing a complex operation on an infrequent basis and should provide customer service to equally inexperienced voters.

The multitude of rules, election laws, and procedures can have the effect of intimidating or empowering poll workers. Either of these reactions can be problematic. Poll workers may allow themselves to be bullied in ways that jeopardize the integrity of an election. For instance, poll workers may issue an official ballot to a voter who demands one instead of the provisional ballot the voter should receive. Alternatively, a poll worker may feel empowered to exercise inappropriate authority. For example, the poll worker might refuse to issue a provisional ballot when it is appropriate, thereby discouraging, intimidating or even disenfranchising the voter.

Given the variations in human character, these problems cannot be eliminated. However, elections officials can reduce the possibility of such situations through effective poll worker training and education that emphasizes the mission of the poll worker, which is to assist every eligible person in voting and to ensure that each ballot is safely secured until it can be counted. After training, poll workers can be coached and reminded on Election Day by roving inspectors who visit polling places throughout the day.

To ensure poll workers have the necessary tools to handle problems and respond to various situations (e.g., voters whose names cannot be found on the voter street index), training should include the following topics.

- Poll workers should be confident they have easily accessible written resources that will help them review procedures and make speedy decisions.
- Poll workers should be trained to contact the county elections office and be given the proper tools to gain priority access to county officials. They should feel comfortable calling for assistance if they feel they need help. If one poll worker

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has a question, other poll workers should not dissuade her/him from calling for clarification, particularly if there is a possibility of disenfranchising a voter.

- Poll workers should know how to instruct voters to contact the county elections office themselves if they need further assistance. Contact information should be in a format that can be easily provided to voters.
- Poll workers should understand that roving inspectors will visit them during the day to troubleshoot and respond to questions, problems, or needs. Poll workers should feel comfortable calling on their roving inspectors or the county elections office at any time.
- Poll workers should receive clear instruction regarding how to handle electioneering, exit pollsters, and poll watchers. Poll workers should be taught that if any other unfamiliar situation arises on Election Day, they should immediately contact the county elections office for assistance.
- Poll workers should be instructed to call the county elections office if they feel threatened or intimidated, if voters feel threatened or intimidated, or if a disturbance of any kind occurs. Poll workers should be instructed to call local law enforcement first if they believe the safety of any person in the polling place is in jeopardy.
- Poll workers should be given clear, unambiguous instruction regarding the limits of their authority. They should understand poll workers have no authority to determine who may vote; rather, poll workers are required to consult with a supervisor or issue a provisional ballot when a question arises.
- Poll workers should be trained to check supplemental rosters to ensure voters are not unnecessarily required to cast provisional ballots.
- Poll workers should understand they will be asked to leave and/or not be asked to work in the next election if they take any actions that threaten the voting process or infringe on the rights of voters.

**Section 2: Polling Place Hours**

Poll workers should be taught the procedures for the opening and closing of the polls on Election Day.

**Opening the Polls**

- On the day of any election, the polls must open at exactly 7:00 a.m. and continuously remain open until closing time at 8:00 p.m. (These times may differ for unconsolidated municipal elections). When the polls are opened, poll workers should announce loudly, "The polls are open," before allowing any ballots to be cast. Voting shall begin as soon as the polls are opened. (§§ 10242, 14212-14214)

**Closing the Polls**

- When the polls are closed, poll workers should proclaim loudly, "The polls are closed." No voters who arrive after the polls close may cast votes. (§§ 14401, 14402)
- Any voter who is in line at 8:00 p.m. when the polls are scheduled to close is allowed to vote. If there is a line when the polls close, a poll worker should stand at the back of the line to let people who arrive after 8:00 p.m. know that the polls have closed. Any voter who arrives after the polls have closed may not be allowed to vote, even if voters who were in line to vote before the polls closed are in the process of voting. (§§ 14401 14402)

**Extended Poll Hours by Court Order**

- Poll workers should be informed that a court order could be issued to extend the voting hours. Poll workers should be told how they would be informed to keep their polling places open. Generally, poll workers will be notified of extended hours by phone, text message, or a visit from a roving inspector.
- Rumors and media reports of court orders are not sufficient to trigger extended poll hours. Poll workers must be officially notified by a county elections official.
- If a court order extends the time the polls are open, poll workers must know that anyone who votes during that timeframe is required to cast a provisional ballot. The provisional ballots cast during the extended time period must be kept separate from other provisional ballots cast before 8:00 p.m., in the event a legal determination is made that the polls should not have been kept open. (§ 14402.5)

**Section 3: Procedures For Certain First-Time Voters,  
Provisional Voting, Vote-By-Mail Voting, and Other Miscellaneous Situations**

Poll workers will face a variety of situations involving proof of identification for first-time voters, vote-by-mail voting, provisional voting, multiple-precinct polling, and electioneering. To address these common situations, poll workers should be educated on the details below. Some situations are relatively rare so a poll worker should not hesitate to contact the county elections official if any questions arise.

**New U.S. Citizens and New California Residents**

- People who identify themselves as new citizens of the United States or new residents of the precinct and are not on the voter registration roster should be offered provisional ballots. A voter may be informed that, unless he/she registered to vote between 14 and 7 days before the election, the provisional ballot will not be counted.
- When voting, a new resident must place the voted ballot into an identification envelope (many counties use a provisional ballot envelope for this purpose) upon which is printed the name and official title of the county elections official. The voter must sign the envelope affidavit, which declares the voter's residency. (§ 3403, 3404)

**Certain First-Time Voters**

- Poll workers should know the requirements and limited conditions under which they need to see a voter's identification. Poll workers may only ask a voter to provide their identification if the voter roster explicitly states identification is required because the voter is a new voter who mailed in a voter registration form without identification. (See, e.g., HAVA § 303(b), 2 CCR 20107)
- Poll workers should be instructed that if a voter who is designated as needing to show identification cannot or does not provide identification, the voter must be offered and allowed to cast a provisional ballot. (2 CCR 20107(c))
- Poll workers should also be taught which forms of identification are acceptable and the proper procedure for accepting and recording voter identification. A list of the acceptable forms of identification should be included in the written materials given to poll workers. (2 CCR 20107)

**Action to Compel Voter Registration**

- Poll workers should be aware that a person who claims to have registered to vote through the California Department of Motor Vehicles or other qualifying public agency, but has not been registered by the county elections official, may initiate a county superior court action to compel the registration. The poll worker should direct the voter to the county elections official for further information. (§ 2142(b))

### **Vote-by-Mail Voting**

- Vote-by-mail voters have three options if they do not mail their ballots in on time.
  1. Turn in the voted vote-by-mail ballot at any polling place in the county where registered to vote;
  2. Surrender the unvoted vote-by-mail ballot at the home precinct and vote on a regular ballot; or
  3. Vote using a provisional ballot if the vote-by-mail ballot and vote-by-mail envelope are not available or if the voter is not at the assigned polling place.
  
- It is common for voters to receive vote-by-mail ballots in the mail, then either forget to mail before Election Day or decide to hand-deliver. Poll workers must be informed that they may accept any vote-by-mail ballot issued by their county, either from the voter to whom it was issued or from an authorized third party delivering on behalf of the voter. Authorized third parties are limited to the voter's spouse, child, parent, grandparent, grandchild, brother, sister, or a person residing in the same household as the voter. (§§ 3015, 3017)
  
- Sometimes voters change their minds and want to vote at the polls instead of by mail. Poll workers should be informed about how to handle surrendered vote-by-mail ballots brought in by those wishing to vote at the polling place. Poll workers should be trained on how to record and handle voted and surrendered vote-by-mail ballots (surrendered vote-by-mail ballot will not be counted), where to place them, and how they should be handled after the polls close. (§§ 3015, 3017)
  
- Poll workers should be advised that sometimes a vote-by-mail voter registered in one county will seek to hand in a vote-by-mail ballot at a polling place in another county. The voter should be told the ballot will not be counted since a ballot may only be accepted before the polls close in the county that issued the ballot. (§ 3017)

### **Provisional Voting for Vote-by-Mail Voters**

- Poll workers should be familiar with the process of providing a provisional ballot to a vote-by-mail voter who did not bring the vote-by-mail ballot to the polling place but still wishes to cast a ballot. Poll workers should also be told how and when to ask for identification from vote-by-mail voters who drop off their vote-by-mail ballots and are listed on the rolls as voters who need to show identification before being allowed to vote. (§ 3016)

### **Provisional Voting**

- Poll workers should be trained on how a voter can request and cast a provisional ballot if the voter's registration or voting status cannot be confirmed at the polling place. (§ 14310)
  
- A voter needs to vote a provisional ballot if:
  1. The voter is not voting in the assigned precinct. (§ 14310)

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2. A poll worker cannot locate the voter's name on the roster or supplemental roster(s) of voters. (§ 14217)
  3. The voter is listed as a vote-by-mail voter and did not bring the vote-by-mail ballot to surrender at the polling place. (§ 3016)
  4. In a primary election, the roster of voters shows the voter is registered to vote in a political party different than the party for which the voter claims to be registered. (§ 14310(c)(3))
  5. The voter is voting for the first time after mailing in a voter registration form and did not provide a driver's license or the last four digits of the social security number on the voter registration form, but did not bring or does not want to show the required identification. (2 CCR 20107(c))
  6. The voter arrives after 8:00 p.m. and the polling place is still open because of a court order. (§ 14402.5)
  7. The voter moved within the county but did not re-register to vote. (§ 14311)
  8. The voter's eligibility to vote cannot otherwise be determined by the poll worker. (§ 14310(c)(3))
- If voters are in the wrong polling place, poll workers should inform them they can either go to their assigned polling place to vote a regular ballot or they can stay and cast a provisional ballot. The poll workers should also explain the benefits and disadvantages of each option. For example, the polling place ballot may not contain all of the same candidates and measures as the ballot in a voter's home precinct. If this type of situation occurs late in the day, and it may be difficult for the voter to travel to the assigned polling place before the polls are scheduled to close, the poll worker should let the voter know that if the voter arrives at the assigned polling place after 8:00 p.m., voting will not be allowed.
  - Poll workers should be informed about how to handle provisional ballots and ensure voters fill out and sign the provisional envelopes. Poll workers should segregate provisional ballots so they can be counted separately. (§ 14310)
  - Poll workers should be trained to allow a voter who has moved to a new address within the same county but has not re-registered to vote at the new address to vote a provisional ballot at the new polling place. (§ 14311)
  - Poll workers should be informed about the process and timing by which a provisional voter can contact the county's free-access system to determine if the voter's provisional ballot was counted or, if not, why not. (§ 14310(d))
  - Poll workers should be prepared to answer a question about how and when a provisional ballot is counted. Poll workers can remind voters that, if a voter is determined to be legally registered to vote, the ballot will be counted and federal

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and state law permit any voter who casts a provisional ballot to find out if the ballot was counted. (HAVA § 302(a)(5)(A), § 14310(d))

- To ensure voters are not being unnecessarily required to vote provisionally, poll workers should be reminded to check supplemental rosters before issuing a provisional ballot.

### **Multiple-Precinct Polling Places**

- Sometimes multiple precincts share one polling place, which can be confusing for both poll workers and voters. For example, precincts #123 and #124 may both be at a polling place located at 433 Main Street. Poll workers should work to understand the dynamics of a multiple-precinct polling place so they can minimize confusion and maximize efficiency for voters. Poll workers should pay especially close attention when issuing ballots for each precinct. Some county elections officials have found assigning one person to serve as a greeter and direct voter traffic helps eliminate much of the confusion.

### **Ballot Shortages**

- If a precinct runs out of paper ballots, state law requires the county elections official to deliver additional ballots to the precinct within two hours. It is essential for poll workers to immediately communicate to their election official the need for additional ballots so every eligible voter has the opportunity to vote. Voters should be given the option to either wait for the ballots to be delivered or to vote immediately using an alternative procedure approved by the Secretary of State. Approved alternatives include:
  - Provisional ballots
  - Vote-by-mail ballots
  - Sample ballots
  - Facsimile ballots
  - Ballots from neighboring precincts
  - Emergency or test ballots that many counties include in precinct supply kits (provided the ballots contain the names of all candidates and titles of all ballot measures along with corresponding areas for voters to mark their choices) (§ 14299)

### **Electioneering**

- Poll workers should learn what constitutes electioneering. They should understand how to calculate a 100-foot perimeter from a polling place, what activities are prohibited within that perimeter, and how to act if they either observe or receive a report that electioneering is occurring in or near their polling place. Poll workers also need to be aware what types of materials are not allowed in the polling place and how to remedy the situation if there is the potential for passive electioneering (e.g., a voter enters a polling place wearing a t-shirt or conspicuous button promoting a candidate or ballot measure).

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- Electioneering is defined in Section 319.5 as “the visible display or audible dissemination of information that advocates for or against any candidate or measure on the ballot within 100 feet of a polling place, an elections official's office, or a satellite location under Section 3018.” “Within 100 feet” means a distance 100 feet from the room or rooms in which voters are signing the roster and casting ballots. Prohibited materials and information include, but are not limited to:
  - A display of a candidate's name, likeness, or logo
  - A display of a ballot measure's number, title, subject, or logo
  - Buttons, hats, pencils, pens, shirts, signs, or stickers containing electioneering information
  - Dissemination of audible electioneering information
- Instruction should also be provided on the difference between electioneering and opinion polling, which is allowed beyond 25 feet of the polls, and how to handle opinion-polling researchers or news media who violate these restrictions. (§ 18370)

### **Challenging an Election**

- Poll workers should be aware that voters may contest an election based on misconduct by a poll worker – a fact that reinforces the importance of properly performing their duties on Election Day. Such misconduct includes:
  - Discriminating against voters based on race, ethnicity, party affiliation, literacy, or disability;
  - Denying an eligible voter the right to cast a ballot;
  - Intentionally misinforming voters of voting status; and
  - Coercing or intimidating voters. (§ 16100)
- Poll workers should immediately report all disruptive behavior to their county elections office and try to separate the disruptive behavior from the polling place operation. Poll workers are not expected to put themselves in physical jeopardy. The poll worker should be instructed to call local law enforcement first if they believe the safety of any person in the polling place is in jeopardy.
- Poll workers should also be aware that a member of the precinct board may challenge a voter within the polling place if the member believes the voter:
  - Is not the person whose name appears on the index
  - Is not a resident of the precinct
  - Is not a citizen of the United States
  - Has already voted in that election
  - Is on parole for the conviction of a felony
- If a challenge occurs, the poll worker must contact the county elections official immediately for assistance. (§ 14240)

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- While challenge procedures are law, poll workers should be reminded that the right of any voter to cast a provisional ballot cannot be challenged or denied.

#### **Section 4: Preventing, Detecting, and Addressing Problems with Voting Systems**

Both poll workers and voting systems are crucial components of elections. The integrity of each California election depends on the reliability of the poll workers and the security of the millions of ballots and thousands of voting machines used to record and/or tabulate votes. Therefore, one of the most important aspects of poll worker instruction is voting systems security.

A voting system is defined by Section 362 as “any mechanical, electromechanical, or electronic system and its software, or any combination of these used to cast or tabulate votes, or both.”

To ensure the security of each voting system, poll worker training should include the following topics.

##### **Pre-Election Day Security**

- If poll workers pick up ballots, voting equipment, or other sensitive materials prior to Election Day, training should include how to ensure those materials are kept secure and how to record an accurate chain of custody of all materials and equipment from the time it leaves the county elections office until it is returned at the end of Election Day.

##### **Set-Up**

- Training should include clear descriptions of security mechanisms used to ensure that materials and equipment at the polling place are in proper condition. Training for first-time poll workers should also include hands-on set-up and initializing of a voting system, stressing the importance of using all required security measures for a given system.

##### **Detecting Tampering**

- Poll workers should have the opportunity to handle a voting system and learn how someone could attempt to tamper with or disable it. Poll workers should be educated about possible ways a system might be tampered with, how to recognize tampering, and how to address the situation if they discover a machine has been, or is being, tampered with or modified in any way. Poll workers should also be instructed to inspect voting machines and voting booths periodically throughout the day to ensure nothing has been altered.

##### **Breakdowns**

- Training should include instruction with clear procedures for addressing common voting equipment breakdowns and malfunctions that a poll worker could easily remedy (e.g., dead battery, jammed paper, unplugged machine).
- For all other breakdowns that cannot be easily remedied, poll workers should be instructed to immediately call the county elections office for help. Each polling place should maintain a log of all incidents and how they were resolved.

##### **Distractions and Authorized Personnel**

- Poll workers should be instructed to not allow anyone to “troubleshoot” voting machinery without proper identification and clear authorization from the county

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elections office. Poll workers should also be instructed to not allow anyone to linger near the poll workers or polling booths, or to otherwise hinder the poll workers' continuous observation of the polling booths.

### **Shutting Down a Voting System or Component**

- Training should include hands-on instruction demonstrating the shutdown of a voting system, including how poll workers must secure and account for all ballots, paper record copies, and/or electronically recorded votes. Poll workers must complete various forms that govern all aspects of accountability, and training must include a review of these forms and their requirements. The chain-of-custody rules must be reinforced at this time.

### **Safely Transporting Voting Systems and Ballots**

- Instruction should include the rules for returning to the county elections office all voted and unvoted ballots and other voting equipment and materials. At least two poll workers must accompany the ballots at all times and a clearly documented chain of custody must be maintained for all ballots and electronic media relating to vote totals and ballots cast. (§ 14434)

### **Other Anomalies**

- If anything unusual happens with a voting system, poll workers should immediately log the problem and call the county elections office. Poll workers should be trained to understand that one of their primary jobs is to witness the electoral process. Therefore, if poll workers question something, they should record it and obtain official direction on how to proceed.

## **Section 5: Operation of Voting Systems**

In order to conduct each election properly and efficiently, poll workers should be instructed in the basic operation of the county voting system. Technology is ever-evolving and equipment may change from one election to the next, so special attention should be paid to this aspect of training poll workers.

### **Standard Operating Procedures and Troubleshooting**

- As part of the Secretary of State's approval process, manufacturers of voting systems are required to create standard operating procedures – detailed instructions county elections officials and poll workers should follow when using a system.
- Poll workers should be given the opportunity to assemble, operate, and take down voting equipment prior using it on Election Day.

### **Hands-On Training**

- The county elections official should determine which poll workers receive hands-on training with the voting system they will use on Election Day and how long the training should last, depending on the voting system's complexities and length of time the system has been used in the jurisdiction. If a voting system has more than one piece of equipment, poll workers should have hands-on training on each piece of equipment. Some voting systems may not require significant training time, and many returning poll workers may already be proficient in the operation of the system. Poll workers overseeing polling places using a different voting system for the first time should be given hands-on training. Role-playing is often an effective way to teach methods for correcting common misunderstandings such as perceived battery-level depletion or a perceived paper jam in a voter-verified paper audit trail printer.
- Initially, hands-on training will help ensure minimal problems on Election Day. In counties using direct-recording electronic (DRE), touch screen, and optical scan systems in polling places, each poll worker should be trained to perform a hands-on poll-opening initialization of the voting system, perform normal operational procedures, perform procedures for attaching or activating any special features for voters with disabilities, and complete closing procedures, including ballot tabulation. Poll workers should be familiar with common errors and receive hands-on training in how to correct those errors. For example, if an optical scan ballot is rejected from a tabulator because of overvoting, the poll worker should explain the problem to the voter, allow the voter to spoil the rejected ballot, and give the voter a new ballot if the voter wants one. Each poll worker should also understand the voter's perspective by walking through the process that a voter would encounter at the polling place and be prepared to respond to common questions about the voting system. For example, the poll worker should be able to explain the meaning of an overvote when an optical scanner detects an overvote.

### **Written Guides**

- Written materials are a great tool for poll workers to use on Election Day.

- Poll worker training should include discussion of all written materials, procedures, and handouts that will be available to poll workers. Training materials should clearly convey the purposes of DRE and optical scan voting systems. Poll workers should be aware that voting systems are designed to offer greater accessibility for voters with disabilities and limited English proficiency, and the systems make it possible for each voter to verify her/his ballot and make corrections if desired. Additional poll worker materials for troubleshooting should be part of the overall polling place documentation. Relevant sections of a voting system's adopted use procedures are often useful references, as well as any specific use conditions imposed by the Secretary of State.

### **Handling Problems**

- Poll workers should have written instructions on how to troubleshoot common problems that might occur on Election Day. These should also be covered in hands-on training and in written materials.
- Poll workers cannot be expected to be troubleshooters for the more technical or unusual problems that may occur with voting systems. Therefore, training sessions should reinforce clear protocols and tools for requesting help from the county elections office. It should be made clear to poll workers that they should immediately inform the county elections office of any unusual problems with the voting systems. On occasion, trying to resolve a problem or malfunction without county guidance or expertise can create more serious problems or consequences.

**Section 6: Relevant Election Laws and Procedures**

There are many election laws with which poll workers should be familiar in order to properly and effectively carry out Election Day responsibilities.

The most important state election laws that poll workers will need to learn are in Divisions 14, 18, and 19 of the California Elections Code. These sections explain the procedures that poll workers should follow on Election Day, including duties, rules for issuing ballots, and procedures for closing polls.

Poll worker education and the accompanying materials should provide poll workers instruction on and familiarity with the following state laws:

**Election Day Duties**

- § 14200 Posting of instruction cards:
  - a. Sample ballot
  - b. The date of election and hours during which polling places will be open
  - c. Instructions on how to vote and how to cast a provisional ballot
  - d. Instructions for mail-in registrants and first-time voters
  - e. Voter Bill of Rights
  - f. General information on federal and state laws
- § 14201 Posting of facsimile ballot, ballot instructions; requirements pertaining to translation
- § 14202 Posting of the index:
  - a. Post in separate, convenient places, at or near polling place and easily accessible to voters, at least two copies of the voter index posted by street address in numerical order
- § 14210 Distributing duties among members of precinct board
- § 14211 Setting up polling place room so that the no ballot container, voting booth, or compartment is hidden from the view of those present
- § 14213 Proclaim polls are open
- § 14215 Exhibit ballot containers
  - a. In presence of any voters at the polling place, the precinct board shall open, exhibit, and close the ballot container. The container shall not be removed from the polling place or presence of bystanders until all the ballots are counted, nor may the container be opened until after the close of the polls.
- § 14216 Announcement of name and address by voter
  - a. Poll worker locates name of voter in index
  - b. Poll worker has voter sign roster with name and address
- § 14217 Inability to find voter name on index
  - a. Inspector reiterates procedures on provisional ballot voting (see also § 14310-14312)
- § 14220 Majority of precinct board must be present at all times
- § 14224 Voting booth occupancy
- § 14227 Communication other than English

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§ 14240 Challenges

**Voting Machine Procedures**

§ 19360 Checking machine  
§ 19361 Handling keys  
§ 19362 Everything in plain view of precinct board  
§ 19363 No loitering in voting booths  
§ 19370 Locking machine in full view of poll watchers  
§ 19371 Sealing machine

**Issuing Ballots**

§ 13102 DTS and nonpartisan voters  
§ 14272 Instruction on operating voting device  
§ 14273 Providing marking devices to voters  
§ 14274 Using marking device  
§ 14275 Returning the ballot  
§ 14277 Removing ballot stub and depositing ballot  
§ 14278 Voter receives one ballot  
§ 14282 Providing assistance to voters in need  
§ 14283 List of assisted voters  
§ 14288 Replacing spoiled ballots  
§ 14290 Canceling spoiled ballots  
§ 14294 Updating posted copy of index every hour up until 6:00 p.m.  
§ 14296 Canceling unused ballots  
§ 14297 Notice of persons voted  
§ 14298 Maintenance of index

**Provisional Voting**

§ 14310 Issuing and handling provisional ballots  
§ 14311 Voters who moved since last election  
§ 14312 Construing these sections liberally in favor of provisional voter

**Closing Procedures**

§ 14400 All board members shall be present at the closing of the polls  
§ 14401 Proclaim polls closed  
a. Place one poll worker at the end of the voter line at 8:00 p.m.  
§ 14402 Any voter arriving after 8:00 p.m. cannot vote  
§ 14403 Deface or seal unused ballots  
§ 14405 Reconciliation of ballots  
a. Complete ballot statement  
b. Account for all ballots: voted, unvoted, spoiled, canceled  
c. Reconciliation  
§ 14420 Processing of voted ballots  
§ 14421 Placement of ballots in container

**Transferring Ballots and Materials**

§ 14430 Prepare supplies for delivery  
§ 14431 All ballots to be sealed  
§ 14432 Materials to be sealed

§ 14434 Delivery of supplies

**Intimidation of Voters**

§ 18370 No electioneering

§ 18540 No voter intimidation

§ 18541 Solicitation dissuading persons from voting

a. No soliciting votes or placing campaign signs within 100 feet of polls

b. No photographing or videotaping voters entering or exiting a polling place

§ 18543 False voter challenge

§ 18544 No firearms in a polling place

**Corruption of Voting**

§ 18562 Secrecy of ballots

§ 18563 Secrecy of votes

§ 18564 No tampering with voting machines

§ 18567 Altering vote tallies

§ 18568 No changing or destroying ballots or poll lists

§ 18570 Delaying delivery of results

**Obligations of Precinct Board**

§ 18700 Appointed board member fails to act

## **Section 7: Poll Worker Training Methods and Materials**

The goal of training is to ensure poll workers are prepared to correctly perform their duties. Training sessions aim to help poll workers retain as much information as possible for later use on Election Day. Studies have shown that poll workers – like all adult learners – learn best by short, interactive training sessions and hands-on instruction.

Trainers should be aware that poll workers' needs for instruction will differ and, where possible, trainers should provide learning opportunities to meet all poll workers' needs. Keep in mind that there are goals for what the poll workers need to learn and a limited time in which to convey the information they need to be successful.

### **Training for Election Day**

- Training sessions about Election Day rules and procedures should be based on specific learning objectives. Training blocks of time can be tailored around objectives and activities like lectures, demonstrations, or small-group breakout sessions. If the overall time for training requires breaks, carefully monitor break time to ensure that poll workers remain focused throughout the session.
- In addition to training poll workers on content, there should also be a training session specific to the voting equipment that will be used on Election Day. Training should occur as close as possible to Election Day in order to maximize retention of information. Ideally, training should not happen more than six weeks before the election.
- Training should be offered during evenings and weekends so the most poll workers have opportunities to learn.
- The most effective training for poll workers relies on interaction between the trainers and the trainees. Interactive training includes:
  - Role-playing
  - Setting up mock polling places
  - Hands-on exercises with voting equipment
  - Identification of objects
  - Team exercises
  - Questioning the audience
- Guest speakers who have previous experience with special circumstances can also be effective for sensitizing poll workers to the needs of certain voters. Videos that demonstrate various situations (such as accommodating voters with different disabilities) can provide good visual information in a short period of time. Studies indicate that lecture formats and multiple-choice tests are the least effective methods for training adults and, if provided, lectures should be supplemented with hands-on exercises or role-playing in order to be valuable.

- Trainers should start each session by providing an overview of what will be covered in the training. The goal and purpose of each lesson should be clearly stated both before it is taught and at the end of the lesson as a summary refresher. Adult learners tend to retain information when they understand why it is being taught to them, so trainers should attempt to offer explanations whenever possible.
- In addition, soliciting comments from the audience during exercises can help reinforce the material being taught. Trainers should use positive feedback when responding to audience questions. Rather than saying that an answer is wrong, it is best to try identifying an accurate portion of the answer and form the fully correct answer from there.
- It may be worth considering forming a partnership with local continuing-education professionals who can train the trainers, since these professionals are familiar with the most effective adult learning techniques.
- Roving polling place inspectors should also receive ongoing training to enhance their skills. The training sessions should be designed to be interactive, engaging the roving inspectors beyond what any lecture style could accomplish.

#### **Use Materials That Will Be Used on Election Day**

- Election Day materials should be used during training sessions. Poll workers should be asked to find certain sections in the documents or conduct exercises using the materials as a key resource. These handouts should be easy to read, as short as possible, and presented in chronological order. Materials should include graphics and have the most important information in the most visible places (e.g., diagrams and bulleted tips on effective polling place setups that allow for privacy and proper flow of traffic). Poll workers should receive these materials at the training sessions and then be allowed to take them home for further studying. Poll workers should be directed to bring along the same materials when they report to work on Election Day.
- A flipbook format can be used to consolidate information such as detailed step-by-step instructions for opening and closing polls, and “what to do if...” scenarios. Tabbed flip pages make finding information easy and minimize the risk of misplacing various sheets of paper.

#### **Additional Workshops or Clinics**

- Counties may also wish to consider providing poll worker training workshops or clinics in the days leading up to Election Day. A clinic can be housed at the county elections office and include the availability of operational voting machinery. Clinics allow poll workers to test their ability to use voting systems and test knowledge of common issues they could face on Election Day. Counties might even consider offering an additional small stipend for poll workers who attend for refresher training or interested persons who are

willing to be available as back-up poll workers in case scheduled workers have to cancel at the last minute.

#### **At-Home Training Options**

- Online poll worker training courses can be used effectively to supplement hands-on instruction, but not to replace it. If possible, training and reference materials should be made available in both online and hard-copy formats.
- Even experienced poll workers can benefit from take-home videos or other media, especially if changes or additions are highlighted in the training materials. Training videos that show poll workers interacting with voters with disabilities can provide a greater understanding of how people with disabilities actually use voting equipment.
- A take-home or online self-testing process may be used to evaluate the success of poll worker training efforts. This approach enables new or continuing poll workers to assess their skills, helps identify people who may no longer be able to perform the job adequately, and highlights training elements that need more attention.

#### **Measuring Success**

- Finally, it is important to measure the effectiveness of training programs. After each training session, poll workers should be asked to fill out assessment forms that gauge opinions of the training. Counties can also track weaknesses in training by having poll workers complete post-election response forms evaluating the complete experience. Counties can then compare the problems that occurred on Election Day with training materials and the initial assessment forms completed by poll workers and trainers.

#### **Resources County Elections Officials Should Provide to Poll Workers**

- **Hotlines for Poll Workers and Voters**

Counties should provide a centralized telephone hotline for poll workers needing assistance with voter languages other than English. Each polling place needs access to a telephone so that poll workers and minority-language voters have a means of making these calls. It is the county's responsibility to ensure that all poll workers have some form of communication link to the county elections office on Election Day.

Poll workers should be reminded that if any emergency arises at a polling place, poll workers should contact the county elections office immediately. Poll workers should be instructed to call local law enforcement first if they believe the safety of any person in the polling place is in jeopardy.

- **Cards with Contact Information for Voters Who Need More Information**

Poll workers should be supplied with printed cards that include phone numbers and other contact information (in English and in the jurisdiction's other languages as required by the Voting Rights Act), which can be given to voters who need more information than the poll workers can provide.

- **Diverse Poll Worker Workforce**  
Counties should broaden and/or continue their poll worker recruitment efforts to ensure a representative group diverse in age, ethnicity, disabilities, and language fluency.
- **Evaluation Tool for Polling Place Compliance**  
Roving polling place inspectors should have an evaluation tool (such as a checklist) to ensure that every polling place is following the rules regarding voting including, but not limited to, providing assistance to voters with disabilities or language challenges and properly using secrecy sleeves and provisional ballots.
- **Performance Review of Poll Workers and Training**  
Counties should establish methods for reviewing poll workers' performance. Poll workers should be evaluated based on key duties with the goal of continuous improvement, as well as removal of less effective workers and reallocation of the best workers to busier precincts and troubleshooter duties.

County elections officials may also want to determine methods in which poll workers can provide feedback on additional topics that should be covered in future training, based upon Election Day experiences.