

2010  
Poll Worker  
Training Standards



**Secretary of State Debra Bowen**

## **Introduction**

Serving as a poll worker is an important and challenging job. There are many rules and regulations that must be followed on Election Day. Given the diversity of the state's population, geography, voting systems and more, training methods will vary by county, but the information provided in these standards will help elections officials train 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 training and written materials to their poll workers.

Moreover, the presentation 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 were published in 2006. These standards will be improved and supplemented in the future, as every election provides new opportunities to learn and improve everyone's skills as an elections official.

## Table of Contents

Section 1 – Ensuring and Protecting the Rights of Every Voter .....	1
A. Poll Workers Should Know the Rights of Voters .....	1
B. Poll Workers Should Be Trained in Cultural Sensitivity.....	8
C. Poll Workers Should Be Trained in How and When to Assist Voters with Disabilities.....	10
D. Poll Workers Should Know Exactly What Responsibilities and Authority They Do and Do Not Have on Election Day.....	14
Section 2 – Polling Place Hours.....	16
Section 3 – Procedures for New Voters, Vote-by-Mail Voting, Provisional Voting, and Other Situations.....	17
Section 4 – Assuring Security of and Troubleshooting Problems with Voting Systems .....	23
Section 5 – Operation of Voting Systems .....	25
Section 6 – Relevant Election Laws and Procedures.....	27
Section 7 – Poll Worker Training Methods and Materials .....	28

## **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 help every registered voter cast a ballot and 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 to approach their task with a customer service mentality to make each voter's 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, know how and when to assist voters with 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 requirement to ensure 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, with special emphasis placed on the rights discussed below.

#### **1. General Rights**

##### **Right to Cast a Ballot**

- Every validly registered voter has a right to cast a ballot. A validly 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)) \*
- At all elections, a voter claiming to be properly registered, but whose valid registration cannot be established by examining the voter index for the precinct or the records on file with the county elections official, shall be entitled to vote a provisional ballot. (§ 14310)
- 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 they provide to all other voters. (§§ 2300(a)(4), 18540; California Constitution, art. 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)

---

\* All references are to the California Elections Code, unless otherwise specified.

## **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 index 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 index 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 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 does not have to contain the voter's address or be issued by a government agency. 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 (CA. Admin. Code § 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, the voter is entitled to cast a provisional ballot and should be politely offered one. (CA. Admin. Code § 20107)

## **Rights of Voters Who Decline to State a Political Party Affiliation or Register with a Nonqualified Political Party**

- Poll workers should have a thorough understanding of the rights and options of voters who are not registered with a qualified political party but are registered as decline-to-state (DTS) voters or are registered with nonqualified political parties. For the purposes of this section, any reference to DTS voters includes both those voters who have declined to state a political party affiliation and those who are registered with nonqualified political parties.
- During a primary election that includes at least one partisan public office on the ballot, there should be a nonpartisan ballot and a separate ballot for each qualified political party. It is important for trainers to clearly distinguish between ballots for qualified political parties and nonpartisan ballots. (§ 13102(a))
- A political party may adopt a party rule that allows a person who is registered as a DTS voter to vote the ballot of that political party in the partisan primary election. (§ 13102(c))
- If a voter is registered as a DTS voter, they shall be given a nonpartisan ballot. However, this voter is entitled to vote the 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 how to use and distribute DTS voter information materials including, but not limited to, signs, posters, and written information, to inform these voters that they may request a ballot of a political party that has authorized a DTS voter to “crossover” to vote the ballot of that political 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 how to properly record which political party’s ballot was requested or whether a nonpartisan ballot was requested by each DTS voter. (§ 13102(d))
- Prior to each primary election, poll workers should be reminded that the ballot options available for voters who are not registered with a political party can change with each election, so they should rely only on the most current information.

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

- If a voter requests a provisional ballot, or believes they are registered to vote despite not being listed on the voter index, 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 indexes to ensure voters are not being unnecessarily required to cast provisional ballots. It is ultimately the duty of the county elections official, not an individual poll worker, to determine whether a provisional ballot is eligible to be counted. (§§ 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 surrenders 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 their initial ballot that they are 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. Poll workers should be trained that any person who asks to vote on a direct electronic recording (DRE) or any other voting machine is entitled to do so. No voter is required to prove a disability or justify

the request to use any machine 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 demonstration 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 and how each item should be posted. This includes flags (and how to properly hang them and ensure they are easily visible to guide voters to the polling place), Voter Bill of Rights posters (which the law requires to be “conspicuously posted both inside and outside every polling place”), updated 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 the Secretary of State's Voter Information Guide, a sample ballot, a copy of the Voter Bill of Rights, or other similar explanatory materials into the voting booth. However, the law does preclude voters from bringing electioneering materials (see Section 3, Electioneering) into the voting booth or within 100 feet of the polling place. (§ 18370)

### **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. The Secretary of State's office can be reached at (800) 345-VOTE (8683). If a poll worker is asked how to report illegal or fraudulent activity, the poll worker should provide the voter with that information. (§ 2300(a)(10))
- A poll worker should inform a voter they can file a written complaint regarding any alleged 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**

Voters are entitled to additional rights, depending on the circumstances. 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 help to mark 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 (and what not) to do if asked to assist. For example, it is a violation of state and federal law to disclose how a person votes. (§§ 2300, 14282-14283)

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

- Voters with disabilities have the right to vote privately and independently, the right to have a voting station reasonably modified, the right to have barriers removed from the voting process, and the right to receive additional 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))
- Voters with disabilities have the right to an accessible polling place. Poll workers need to be trained on how to use every voting machine that is offered in the polling place and on procedures for curbside voting if the voter is unable to enter the polling place. 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 voter with a disability (e.g., a guide dog for a visually impaired person). Poll workers should walk on the side of the voter that is on the opposite side of the service animal. They should not pet or engage a service animal without permission from the owner. A service animal can be any trained domestic animal for the purpose of assisting the voter. Service dogs can be any breed or size. (Code of Federal Regulations, Title 28, §§ 35.130(b)(7), 36.014)
- A person with a disability who is unable to write may use a signature stamp (which must be approved by the county elections official prior to Election Day), or authorize another person to use the stamp, on any elections-related document that requires a signature (including a vote-by-mail ballot envelope). A signature stamp on a vote-by-mail envelope is treated in the same manner as a written signature. (§ 354.5)
- All eligible citizens have the right to register to vote unless a court has determined them to be incompetent or they are 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 encountering 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 voter with a disability as they would

to any other voter. No voter who is on the voter index is required to show any identification unless they are a first-time voter who registered to vote by mail and are so noted in the index, or to prove their competence to receive or cast a ballot. Poll workers should be reminded that if a voter's name is not on the voter index, they are still entitled to cast a provisional ballot. (§§ 2000, 2100; California Constitution, art. II, § 2; HAVA § 303(a)(5); 2 CA. Admin. Code 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 secrecy of the ballot may be compromised. A separate table or voting booth compliant with the Americans with Disabilities Act (ADA) should be provided nearby.
- For additional information on assisting voters with disabilities, see page 9.

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

- The federal Voting Rights Act provides that in some precincts, 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 the availability of alternate-language materials. Poll workers should not make any comments regarding voters who ask to use alternative language materials. The county elections official may want to provide poll workers with written materials explaining how to appropriately offer alternate-language ballots and bring the voter's attention to the availability of alternate-language materials. (§ 12303)
- Voters who need or want assistance to vote have the right to receive help 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. (§§ 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 utmost 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 that issued it or delivered to any polling place in that county by the close of polls at 8:00 p.m. on Election Day. The voter or a designated third party may deliver 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 wants to vote at the polling place may surrender their vote-by-mail ballot in exchange for a regular ballot. A voter who does not bring their 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 when 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)
- Poll workers should be made aware that people have the right to observe the election process, even if they are not voting. Observers may be at the polls before they open to the public, during polling hours, and after the polls close. 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. (§ 2300(a)(9))
- Frequently, people visit polling places on Election Day to check the voter index. These may be 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 these people. Poll workers should also be trained how to update the voter 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 their permission. Members of the media should contact the county elections official before the election to prevent any problems or confusion on Election Day. (§ 18541)

## **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, sensory, 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 utmost level of respect and be provided with the same level of service, regardless of what 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, 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 help them to vote. (§ 12303)
- Poll workers should be trained on appropriate language to use when speaking to a voter with a disability. For example, the person is not a blind voter, but rather, a voter who is visually impaired. The voter is not wheelchair bound, but rather, the voter uses a wheelchair.
- 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, 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 their 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 assistance. Some people may be much more independent than they appear to be. However, poll workers should be trained not to 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 explaining 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 each voter’s privacy is protected.

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

- If poll workers find language or any other barrier is interfering with the ability to communicate with a voter, they should be taught to ask a bilingual poll worker for

help or to contact a hotline at the county elections office for assistance. County officials should provide the appropriate contact information and the assistance necessary to make such contact.

### **Display Materials**

- Poll workers should be trained 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.

### **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 removed from the precinct.

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

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 utmost respectful and courteous level of service to every voter. Voters with disabilities, like every other voter, must be afforded the ability to cast their ballots in private.

### **Access**

- Poll workers must be instructed how to ensure voters with disabilities can get into and maneuver inside the polling place. This includes providing poll workers with the mitigating measures that were identified when the polling place was evaluated for disability access. Poll workers need to be provided with necessary and proper equipment, signs, etc., to ensure the polling place is accessible. Access starts by clearly marking the most accessible way to get to the polling place. Accessible parking spaces must be clearly marked. This may include creating temporary accessible parking spaces closest to the polling place entrance. Directional signs will help voters identify the most accessible way to get to the polling place and voting equipment. Poll workers should be trained to temporarily modify the outside and inside set-up of the polling place (parking, tables, chairs, voting booths, etc.) to make it accessible and still ensure voters can cast their ballots in private.
- Poll workers should be taught that not all polling places can be made accessible. The law requires each polling place to have at least one accessible voting machine. If a polling place is designated as inaccessible because it cannot be made accessible with mitigating measures, poll workers will need to direct voters with disabilities to a nearby accessible polling place or provide curbside voting.

Therefore, poll workers must 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 must be familiar with the procedures for conducting curbside voting. (§ 14282)
- Procedures for curbside voting include:
  - Taking the voter index, ballot marking pen, and ballot (in a secrecy sleeve) outside to the voter.
  - Removing the receipt stub before giving the ballot and stub to the voter.
  - Allowing the voter to mark the ballot in private.
  - Taking the voted ballot in the secrecy sleeve and marking pen back into the polling place and inserting the voted ballot into the ballot box or scanner.
  - Writing the name of the assisted voter in the Assisted Voters List on the back cover of the voter index. (§ 14283)

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

- Poll workers should be familiar with how to arrange furniture and equipment at a polling place to ensure materials are accessible to all voters and voters with disabilities are able to use equipment privately and independently. Set-up procedures should provide instructions on how to put together voting booths for use by voters who, for example, use wheelchairs. Precinct supplies should include aids such as magnifying sheets for voters with sight disabilities, pen grips, or signature guides. Poll workers should be prepared to offer the aides to voters.
- Many voters with disabilities have difficulty standing in line for any length of time. If a voter asks to use a chair, poll workers should provide one. Poll workers need to help such voters keep their place in line if necessary. Also, some voters will need to sit down to use audio keypads.

### **Voting System Access**

- Poll workers need to remember that some voters with disabilities may have disabilities that are not visible. When a voter wants to vote on the accessible voting machine, poll workers must allow them to use it. Poll workers should not question why the voter needs to use the accessible voting machine or assume the person does not have a disability simply because the poll worker cannot see it.

- Each polling place must have at least one accessible voting machine. Poll workers should ensure voting machines are set up in an accessible manner and, if a machine has auxiliary aids that provide or improve access, they should be familiar with the proper set-up and use (e.g., magnifying glasses, alternate language selection, audio headsets, and tactile controls). Poll workers should be trained on how 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 voters with limited manual dexterity. (HAVA § 301(a)(3)(B))
- Poll workers should be taught to, before the polls open, practice connecting and removing equipment that provides accessibility for voters with disabilities to ensure the equipment is properly set up. 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 <http://www.sos.ca.gov/voting-systems/oversight/top-to-bottom-review.htm>.

### **Poll Workers Should Be Trained in Disability Sensitivity**

- Poll workers should be trained on disability sensitivity – the ability to recognize and respond to the needs and sensitivities of people with different types of disabilities.
- Poll workers should be taught disability sensitivity for working with voters with disabilities and, in particular, focus on not treating voters with disabilities as less-capable voters.
- Poll workers should do the following when working with voters with disabilities:
  - Use common sense. 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.
  - Be considerate and patient. Ask a voter what you can do to assist – do not help without asking or assume you know what is needed. Be patient if the voter requires more time 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 their companion, interpreter, or assistant. Face the voter with a disability when you are talking. For example, if you are looking at a voter who is blind, you will be speaking directly to them, too.

- Keep the path to the voting booth clear. 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 move through the polling place, be as specific as possible and identify obstacles in their way.
- If the person has a guide dog, walk on the side of the voter opposite from the side the dog is on. Do not pet or engage a guide dog without permission from the owner. Note: Guide dogs can be any breed or size. If you are unsure if the dog is a service animal, simply ask.
- 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 disabilities and/or who are hard of hearing:**

- 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 the voter understand what you are saying. Face the voter at all times.
- Rephrase, rather than repeat, sentences that the voter does not understand.

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

- Do not push or touch a wheelchair without the owner's consent. People using adaptive equipment consider the equipment to be part of their 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 accessible doors to the polling place unlocked and free of clutter.

### **Removing insensitive poll workers**

- If a poll worker is identified on Election Day as being insensitive to voters with disabilities, or is otherwise unsuitable for a particular polling place, that poll worker should be reported to the elections official and should be immediately removed from the precinct.

### **D. Poll Workers Should Know Exactly What Responsibilities and Authority They Do and Do Not Have on Election Day**

Poll workers are asked to follow and enforce complex rules on Election Day. They are charged with managing a complex operation and are asked to provide customer service to equally inexperienced voters.

The large number of rules, election laws, and procedures can intimidate or empower 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 authority they don't have. For example, the poll worker might refuse to give a provisional ballot to a voter who is entitled to receive one, a decision that will disenfranchise that voter.

Given differences in human character, these problems cannot be eliminated. However, elections officials can reduce the potential that such situations will arise through effective poll worker training and education that emphasizes the mission of the poll worker, which is to assist every 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 index), training should provide poll workers with:

- Easy access to written materials that will help them review procedures and make speedy decisions.
- The proper tools to quickly reach county officials. They should feel comfortable calling for help if they feel they need it. If one poll worker has a question, other poll workers should not dissuade them from calling for clarification, particularly if a voter could be disenfranchised.

- Information they can easily provide to voters who want or need to contact the county elections office themselves.
- The understanding 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.
- Clear instruction about 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.
- Instructions 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.
- 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.
- Training to check supplemental voter indexes to ensure voters are not required to cast provisional ballots unnecessarily.
- An understanding 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 how to open and close polls on Election Day.

### **Opening the Polls**

- On Election Day, the polls must open at exactly 7:00 a.m. and remain open continuously 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 (including a voter dropping off a vote-by-mail ballot) 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 New Voters, Vote-by-Mail Voting, Provisional Voting, and Other Situations**

Poll workers will face a variety of situations involving proof of identification for first-time voters, vote-by-mail voters, provisional voters, multiple-precinct polling, and electioneering. To address these 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**

- The law allows any new U.S. citizen or new California resident to register and vote at the office of the county elections official between 7 and 14 days before Election Day. People who go to the polls and identify themselves as new United States citizens or new residents of the precinct and are not on the voter index should be given provisional ballots. A voter may be told that, unless they registered to vote between 7 and 14 days before the election, the provisional ballot will not be counted.
- When voting, a new resident must place their ballot into an identification envelope provided by the poll worker (many counties use a provisional ballot envelope for this purpose). The voter must sign the envelope affidavit, which declares their 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 index clearly states identification is required. This notation on the voter index will be made when the voter mailed in a voter registration form without providing a driver's license number or the last 4 digits of their social security number. (See, e.g., HAVA § 303(b), CA Admin. Code § 20107)
- 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. (CA Admin. Code § 20107(c))
- Poll workers should also be taught which forms of identification are acceptable and how to accept and record the voter's identification. A list of the acceptable forms of identification should be included in the written materials given to poll workers. (CA Admin. Code § 20107)

#### **Action to Compel Voter Registration**

- A voter who states they registered to vote through the California Department of Motor Vehicles or another public agency that provides voter registration services, but is not on the official voter index, may go to the county superior court to

compel the county to place them on the voter index. 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 decide not to mail their ballots in. They can:
  1. Turn in the voted vote-by-mail ballot at any polling place in the county where they are registered to vote;
  2. Surrender the unvoted vote-by-mail ballot at their home precinct and vote on a regular ballot; or
  3. Vote using a ballot in a provisional envelope if they do not have their vote-by-mail ballot and vote-by-mail envelope or if they are not at their assigned polling place.
- It is not uncommon for a voter to receive a vote-by-mail ballot in the mail, then either forget to mail it back before Election Day or decide to hand-deliver it to the polls. Poll workers must be informed they must accept any vote-by-mail ballot issued to a voter by their county, either from the voter or from an authorized third party delivering it for the voter. Authorized third parties are limited to the voter's spouse, child, parent, grandparent, grandchild, brother, sister, or a person living at the same household as the voter. If the voter requested and received their ballot under late vote-by-mail conditions (7 or fewer days before Election Day), the voter can authorize any person to return the ballot for them. (§§ 3015, 3017, 3021)
- Sometimes voters change their minds and want to vote at the polls instead of by mail. Poll workers should be taught how to handle surrendered vote-by-mail ballots brought in by these voters. Poll workers should be trained how to record and handle voted and surrendered vote-by-mail ballots (surrendered vote-by-mail ballot will not be counted), where to store them, and how they should be handled after the polls close. (§§ 3015, 3017)
- Poll workers should be told 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 how to provide a provisional ballot to a vote-by-mail voter who wants to vote but did not bring their vote-by-mail ballot to the polling place. (§ 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 their assigned precinct. (§ 14310)
  2. A voter's name is not listed on the voter index or any supplemental index 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 voter index 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.  
(CA Admin. Code § 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))
  9. Any other reason why the voter's eligibility to vote cannot be determined.
- If voters are in the wrong polling place, poll workers should tell 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 advantages 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, the poll worker should let the voter know that if the voter arrives at their assigned polling place after 8:00 p.m., the voter will not be allowed to cast a ballot.
- Poll workers should be informed 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 processed 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. Poll workers should be instructed to provide these voters with a registration form. (§ 14311)
- Poll workers should know how a provisional voter can contact the county’s free-access system to determine if their provisional ballot was counted or, if not, why not. (§ 14310(d))
- To ensure voters are not being required to vote provisionally unnecessarily, poll workers should be reminded to check supplemental voter indexes 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 be at a polling place located at 433 Main Street. Poll workers should understand the dynamics of a multiple-precinct polling place to 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 tell their elections official they need 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 using:
  - 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 measure a 100-foot perimeter from a polling place (or request assistance from roving inspectors), what activities are prohibited within that perimeter, and what to do if they either see or hear about electioneering 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 what to do, if, for example, a voter enters a polling place wearing a t-shirt or button promoting or opposing a candidate or ballot measure.
- 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.” This effectively means electioneering cannot be conducted within 100 feet of the entrance to the polling place. 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 information about candidates or issues on the ballot
  - Any audible broadcasting of information about candidates or measures on the ballot
- Poll workers need to understand the difference between electioneering and opinion/exit polling, which is allowed beyond 25 feet of the polls, and how to handle opinion-polling researchers or members of the news media who violate these restrictions. (§ 18370)

## **Challenging an Election**

- Poll workers should be aware that voters are permitted to 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 their registration status;
  - Coercing or intimidating voters (§ 16100)

- Poll workers should immediately report all disruptive behavior to their county elections office and try to move any such behavior outside of the polling place. Poll workers should never put themselves in physical jeopardy. Poll workers should be taught to call local law enforcement first if they believe anyone's safety is in jeopardy.
- Poll workers should also be aware that a member of the precinct board is permitted to challenge a voter at the polling place if the member believes the voter:
  - Is not the person whose name appears on the voter 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)
- 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: Assuring Security of and Troubleshooting Problems with Voting Systems**

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 machine and system security.

To ensure the security of each voting machine and 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 keep those materials secure. It should also ensure an accurate chain of custody is kept of all materials and equipment from the time they leave the county elections office until they are returned at the end of Election Day.

### **Set-Up**

- Training should include clear descriptions of security mechanisms used to ensure materials and equipment are in proper condition. Training for poll workers responsible for operating voting equipment on Election Day should also include hands-on set-up of voting equipment, stressing the importance of using all required security measures for a given system.

### **Detecting Tampering**

- Poll workers should be educated about how to recognize tampering and what to do if they discover a machine has been, or is being, tampered with or modified in any way. Poll workers should also be taught to inspect voting machines and voting booths throughout the day to ensure nothing has been altered.

### **Machine Issues or Problems**

- Training should include instructions with clear procedures for addressing common voting equipment issues or problems that a poll worker could easily remedy (e.g., identify an unplugged machine and replace a printer with a second printer in the event of a paper jam).
- For all other problems that cannot be easily remedied, poll workers should be taught to immediately call the county elections office for help. Each county elections official must establish procedures to maintain a log of all incidents and how they were resolved.

## **Distractions and Authorized Personnel**

- Poll workers should be taught to not allow anyone to “troubleshoot” voting machinery without proper identification and clear authorization from the county elections office. Poll workers should also be taught to not allow anyone to linger near the poll workers or polling booths, or to prevent the poll workers from being able to continually watch the voting area.

## **Closing a Voting System or Component**

- Training should include hands-on instruction demonstrating the closing 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 to ensure all items are accounted for, 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**

- Poll workers must know 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 equipment relating to vote totals and ballots cast. (§ 14434)

## **Other Issues**

- If anything unusual happens with a voting machine or 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 watch and bear witness to 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**

To conduct each election properly and efficiently, poll workers should understand the basic operation of the county voting system. Technology is continually 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 Use Procedures and Troubleshooting**

- As part of the Secretary of State's approval process, voting system manufacturers 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 encouraged to assemble, operate, and take down voting equipment prior to using it on Election Day.

### **Hands-On Training**

- Hands-on training will reduce the number of problems on Election Day. 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, much of which will depend on the voting system's complexities and how long the system has been used in the county.
- 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 at locations using a different voting system for the first time should be given hands-on training. Role-playing is often an effective way to teach ways to correct common misunderstandings such as whether a battery is running low or the paper is jammed in a machine.
- Poll workers should receive hands-on training on how to set the machines up on Election Day and how to activate any special features for voters with disabilities. 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 it was overvoted, the poll worker should explain the problem to the voter and allow the voter to cast a new ballot if the voter wants one.

- Each poll worker should also understand the voter's perspective by walking through the process 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.

- Finally, poll workers should receive hands-on training on how to close the machines and tabulate votes cast after the polls close.

### **Written Guides**

- Written materials are great tools 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 on Election Day. Training materials should clearly convey the purposes of all balloting systems. Poll workers should be aware that each polling place has different types of voting machines to, in part, offer greater accessibility for voters with disabilities and limited English proficiency. All systems make it possible for each voter to verify their 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 exercises.
- Poll workers cannot be expected to fix the more technical or unusual problems that may occur with voting machines or systems. Therefore, training sessions should provide a clear direction on when and how to ask for 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 a voting machine or system. Sometimes, trying to fix a problem without help from the county elections office 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 state laws. Each polling place must have the most recent edition of the “Elections Officer’s Digest.” (§ 14105(e))

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

The goal of training is to ensure poll workers are prepared to correctly perform their duties on Election Day to best serve the voters. 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 during 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 the amount of information the poll workers need to learn and the limited time elections officials have to convey that information to their poll workers.

### **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 help poll workers stay focused throughout the session.
- In addition to training poll workers on the laws, rules, and regulations they need to follow, 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 increase the ability of poll workers to retain the information. Ideally, training should not happen more than six weeks before the election.
- Training should be offered during evenings and weekends so a variety of people have opportunities to be poll workers.
- The most effective training for poll workers comes out of discussion between the trainers and the trainees. To promote discussion, training sessions should include:
  - Role-playing
  - Setting up mock polling places
  - Hands-on exercises with voting equipment
  - Team exercises
  - Questioning the poll worker trainees
- Guest speakers who have experience with unusual situations at the polling place can sensitize poll workers to the needs of certain voters. Videos that

show different situations (such as accommodating voters with different disabilities) 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. If a county elections official relies on lectures, those lectures should be supplemented with hands-on exercises or role-playing in order to be more 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 before it is taught and should be summarized at the end. Adults tend to retain information when they understand why it is being taught to them, so trainers should attempt to offer explanations whenever possible.
- Soliciting comments from the poll worker trainees during exercises can reinforce the material being taught. Trainers should use positive feedback when responding to questions. Rather than saying that an answer is wrong, it is best to identify an accurate piece of the answer and use that to provide a fully correct answer.
- It may be beneficial to partner 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 interactive as well, engaging the roving inspectors in role-playing, hands-on exercises, and question-and-answer sessions.

### **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 that require them to use the materials. Handouts should be easy to read, be as short as possible, and be presented in the order that they will be used on Election Day. 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). Poll workers should receive these materials at the training sessions and then be allowed to take them home. 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 reduce the risk that poll workers will misplace 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. Clinics allow poll workers to test their ability to use voting systems and test their 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 for people 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 learn from take-home videos or other media, especially if changes or additions to past practices are highlighted in the training materials. Training videos that show poll workers dealing 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 how effective poll worker training efforts have been. This approach enables poll workers to assess their skills, helps identify people who may no longer be able to perform the job adequately, and highlights training that need to be improved.

## **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 forms that assess the quality of the training. Counties can also improve future training by having poll workers complete post-election response forms to evaluate the complete experience.

## **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 who need assistance with any issue that comes up on Election Day, including questions about voter languages other than English, voting equipment, how to assist a voter who is not on the voter index, etc. Each polling place needs access to a telephone so poll workers and voters can make these calls. It is the county elections official'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, they should contact the county elections office immediately. Poll workers should be instructed to call local law enforcement first if they believe the safety of anyone is in jeopardy.

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

Poll workers should be given 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), to give 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 Roving Inspectors**

Roving polling place inspectors should have an evaluation tool (such as a checklist) to ensure 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 and/or improve existing methods for reviewing poll workers' performance and their own performance. Poll workers should be evaluated based on key duties with the goal of continuous improvement, while the county may learn how to improve its training methods or how it can reallocate the best workers to busier precincts and troubleshooter duties.

County elections officials may also want to establish ways for poll workers to provide feedback on additional topics that should be covered in future training, based on their Election Day experiences.