2020 Poll Worker Training Standards

Prepared by the Office of the
Secretary of State

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 2020 revised standards reflect lessons learned and changes in state law that have taken effect since the original standards were published in 2006. In addition, these standards have been updated for the November 3, 2020, General Election to reflect changes in election procedures due to the COVID-19 pandemic. 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 election official.

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Section 1: COVID-19 Poll Worker Safety

In light of the COVID-19 pandemic, poll workers should be provided additional training on measures to ensure their health and safety, and the health and safety of voters, observers, and members of the public.

A. COVID-19 and You

- **Knowing When You are Sick**

  It's important to for poll workers to know when they are sick, and to stay home if they are not feeling well or have any symptoms of COVID-19 or other illnesses. Poll workers should stay home if you have any of the following: frequent cough, fever, difficulty breathing, chills, muscle pain, headache, sore throat, and/or recent loss of taste or smell. In addition, poll workers should stay home if they or someone they live with has been diagnosed with COVID-19.

  Poll workers should be provided with the contact information of the inspector of their assigned polling location in the event the poll worker is sick and is unable to serve as a poll worker.

- **Staying Healthy Prior to Service**

  Poll workers should be informed that there are many things they can do at home to prevent them and others from becoming sick. These include:

  - Self-screening including temperature and symptom checks.
  - Seeking medical attention if the symptoms become severe, including persistent pain or pressure in the chest, confusion, or bluish lips or face.
  - Frequent handwashing, scrubbing with soap and water for at least 20 seconds.
  - Using hand sanitizer with at least 70% isopropyl alcohol when hand washing with soap and water is not an option.
  - Practicing physical distancing of at least 6 feet both at work and away from work.
  - Avoiding touching of your eyes, nose, or mouth.
  - Wearing a face covering over your mouth <u>and</u> nose when you go out.

B. Poll Workers & COVID-19

- **Personal Prevention in the Voting Site**

  Once inside the polling place, there are many precautions that poll workers should take to keep themselves and others as safe as possible. These precautions include:

  - Practicing physical distancing by staying at least 6 feet away from other election workers, voters, and observers.
  - Avoiding touching your eyes, nose, or mouth.
  - Wearing a face covering.

- Washing or sanitizing your hands frequently, including upon arrival at the polling location, after using the restroom, after blowing your nose or sneezing, after eating, and before leaving the polling location.

C. Organizing Polling Locations for Health and Safety

- **Polling Location Setup and Traffic Flow**

When setting up the polling location, careful consideration must be given for placement of stations and equipment to minimize close contact and keep people in their own "air space." This can be done primarily through physical distancing.

Polling locations should be configured to ensure people can remain 6 feet apart from one another, when standing or moving. An element critical to making this happen is creating a one-way circuit that traffic flows around.

- The first place voters will go is check-in, so this station should be near or at the entrance. If there is room, some portion of the line may be inside, but keeping lines in larger atriums or even outside (weather permitting) may be safer.
  - Check-in stations should be 6 feet from each other.

- From the check-in stations, voters next go to a voting booth. Booths should be placed 6 feet apart, and also 6 feet from the check-in stations and the scanner.
  - Voting booths should be placed more deeply into the room, continuing the circular flow of traffic.
  - Some sites with very limited space may receive plexiglass or partitions, which can block direct air flow between voting booths. The purpose is to allow you to set up booths closer than 6 feet from each other, which still have their own separate air space.

- The final station for most voters will be the scanner, which should be near an exit, ideally a different doorway than the entrance, or on the opposite side of the entrance from the check-in stations.

- **Physical Distancing and Visual Cues**

Visual cues should be added to encourage people to stay at least 6 feet from each other.

- Floor markings should show stopping points in lines and in front of stations. Markings should be places on the floor before the entrance to the room so that voters stand 6 feet from each other while they are waiting to enter the polling room.

- Colored tape can indicate routes from one area to another, so voters recognize the best path that keeps them away from others.

- Furniture can guide voters to best paths (for instance, using a table to block those who just cast their ballot from exiting via the entrance.)

The goal of physical distancing is to keep people far enough apart that they're less likely to inhale air someone else breathed out.

- **Ventilation**

Fresh air is also helpful in combating the virus, so maximizing ventilation by keeping doors and windows open is a healthy option where possible.

- **Cleaning and Disinfecting**

Poll workers must be provided guidance relating to their duties of cleaning and disinfecting the polling location. The elections official should provide a schedule of duties for the poll workers at the polling location and must ensure that the necessary cleaning and disinfecting supplies are readily available.

Poll workers should be guided to routinely disinfect commonly used surfaces before voting begins and regularly throughout the day. Commonly used surfaces can include door handles, pens and/or styluses, activation cards, and voting booths and equipment. Specific instructions from the vendor or manufacturer of the voting equipment must be provided to ensure the voting equipment is not damaged in any way.

Poll workers will need to monitor cleaning and disinfecting supply inventory and notify the precinct inspector if they foresee running out.

D. Handling Voters Safely

There are several key points where election workers interact with voters at the polling location, including upon arrival, at check-in, and while moving throughout the routine voting process. In addition, there will be critical points of interaction, and special processes, when assisting voters with special requirements, such as curbside voters and voters not wearing a face covering. With the new challenges of physical distancing and ensuring the polling location is as safe as possible for all, it is important that safety and clear communications be at the forefront of all of our interactions.

The first stop for voters, and maybe point of closest contact, will be check-in. Poll workers should minimize proximity by asking the voter to remain 6 feet away, and only step forward when procedures require. The poll worker should ask the voter to use hand sanitizer and should not provide the voter with a ballot until the hand sanitizer has dried.

When the voter has their ballot, the poll worker should direct them to their ballot booth and indicate a path that keeps them distanced from other voters. The poll worker should also indicate the appropriate path from the voting booth to the ballot scanner, or to the poll worker who will receive the voted ballot.

If there is a line, the poll worker should remind the voter to keep a distance of 6 feet between them and the next voter in line, and to stand on any floor markings to maintain distance indicating a distance of 6 feet.

In the event a voter needs assistance, the poll worker should maintain proper distance while the issue is being addressed.

When the voter is finished marking their ballot, the poll worker should ask the voter to insert their own ballot into the scanner.

Prior to the voter leaving the polling location, the poll worker should place an "I voted" sticker, if available on a surface where the voter can pick it up without touching the other sticker. The poll worker should then ask the voter to use hand sanitizer again, and then direct the voter to the best exit.

E. Voters Without Face Coverings

A voter may enter the polling location without a face covering. Many will be forgetful, or at any rate willing to use a face covering, so poll workers should be provided with simple messages that can help:

- Do you have a face covering you can use?
- If you don't have one, we'd be happy to provide one (if available).
- Following the guidelines on face coverings and distancing can protect you and everyone else, so we do ask that you follow them.

Voters who don't comply still must be allowed to vote, so poll workers must take measures that can keep the situation calm. Poll workers should remember that face coverings and physical distancing are to some degree overlapping measures, with the goal of avoiding breathing air others have exhaled. Poll workers can improve health and safety by keeping the interaction calm and maintaining distance.

Even most voters who refuse to use a face covering accept the need to maintain distance and are likely to be reassured once they know they'll be allowed to vote. Poll workers should let them know:

- We do respect your right to vote, and you'll be checked in and allowed to vote as quickly as possible. We'll need you to maintain physical distance of 6 feet from others. Please give us a bit of time to organize the voting area to allow additional physical distance between you, our election workers, and other voters.
- Calmly repeating that "you will be allowed to vote," perhaps more than once, may help receipt of the message.

Poll workers should communicate to other poll workers that a voter without a face covering will be checking in, and it is recommended that another poll worker is present when communicating with a voter without a face covering.

Poll workers should send the voter to a check-in station that has the most distance between it and other stations. If that station is not available, the poll worker should ask the voter to stand to the side while it becomes free. It is important to have as little interaction with the voter during this time as possible. After checking in, the voter can be sent to a voting booth at an appropriate distance from other booths.

Poll workers must be aware that other voters may try to talk to the voter, which could escalate the situation. The poll worker can calm the situation by stressing to other voters that their health and safety is very important.

These situations will be challenging because tempers may rise on both sides. Elections officials should provide role-playing ahead of time, which may help you keep things calm at the polling location. The role-playing may help the poll worker maintain a level head, de-escalate a situation by calming an angry voter, and remember procedures for seeking additional support if necessary.

Poll workers should have phone numbers for the next level of authority (building security or law enforcement) handy--keyed in beforehand. In addition, poll workers can agree ahead of time on a way to ask for back-up. For instance, asking a fellow election worker "Is John here?" where no one named John is working can be an agreed phrase for a call to security or law enforcement.

F. Election Observers

As in all elections, observers must be accommodated. Space should be made for observation, while allotting for 6 feet of physical distancing.

Observers will need to be able to view check-ins and scanning and may periodically ask to look at the voting equipment used in the polling location. However, to promote health and safety, interaction between observers and others in the polling location should be minimized.

Poll workers should be instructed that observers must wear a face covering, maintain physical distancing, and observe all health guidelines at the particular polling location. If an observer refuses to respect the rules, the precinct inspector must notify the office of the county elections official for further action.

Section 2: 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 and gender 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 trainings should include a review of the rights of voters, with special emphasis placed on the rights discussed below.

General Rights

Right to Cast a Ballot

- A voter who refuses to wear a face covering has the right to cast a ballot. For further information, see Section 1.E. and the Secretary of State's Election Administration Guidance under COVID-19, which can be found on the Secretary of State's website at: https://elections.cdn.sos.ca.gov/statewide-elections/2020-general/election-admin-guidance.pdf.

- Every registered or conditionally registered voter has a right to cast a ballot. A registered voter is a United States citizen who is a resident of California, is at least 18 years old, is not currently imprisoned or on parole for conviction of a felony, is not currently found to be mentally incompetent and has had their right to vote revoked by a court of law, and who is registered to vote at their 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 list for the precinct or the records on file with the county elections official, shall be entitled to vote a provisional ballot. (§§ 2300(a)(2), 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). (§§ 2300(a)(4), 18540; California Constitution, art. II, § 7)

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

- 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), 14212, 14401, 14402)

Rights of Voters Who are Required to Provide Identification

- Poll workers must not ask a voter to provide their identification unless the voter list clearly states identification is required.

- Under federal law, first-time voters who registered by mail may be required to show identification to vote. This notation on the voter list will be made when the voter mailed in a voter registration form without providing a driver license number or the last four digits of their social security number. (Section 303 of the Help America Vote Act of 2002 (HAVA),52 United States Code (U.S.C.) § 21083(b); Cal. Code of Regs., tit. 2 § 20107)

- When asking for identification, the poll workers should know which forms of identification are acceptable and that photo identification is not required – a photo identification 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(d) of the California Code of Regulations.

- Poll workers should explain to those 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. (§ 14310; Cal. Code of Regs., tit. 2 §20107(c))

Rights of Voters Who Decline to State a Political Party Preference 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 No Party Preference (NPP) voters (voters who have declined to state a political party preference) or are registered with nonqualified political parties.[1]

[1] For the purposes of this section, any reference to NPP voters includes both those voters who have declined to state a political party preference and those who are registered with nonqualified political parties.

- During a primary election that includes at least one partisan public office (e.g., United State President) 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. (§§ 334, 337, 13102(a))

- A political party may adopt a party rule that allows a person who is registered as an NPP voter to vote the ballot of that political party in the partisan primary election. (§ 13102(c))

- If a voter is registered as an NPP voter, they shall be given a nonpartisan ballot. However, this voter is entitled to vote the ballot of a political party that has authorized NPP voters to vote the ballot of that political party. (§ 13102(b))

- At a partisan primary election, before providing a voter who has declined to disclose a political party preference with a nonpartisan ballot or before the voter enters the voting booth, as applicable, a member of the precinct board shall provide a uniform notification to the voter informing him or her that he or she may request a political party's ballot (a "crossover" ballot) and the name of each political party that has authorized a voter who has declined to disclose a political party preference to vote in its ballot for that election. (§14227.5)

- 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 NPP voter. (§ 13102(d))

- Prior to each partisan 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 list, the voter is entitled to 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 lists or rosters 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 not registered may also conditionally register (also known as same day registration) to vote in-person at all permanent and satellite offices of the county elections official and all polling places in the county and cast a ballot that day. (§ 2170)

- A voter who is listed as a vote-by-mail voter has a right to cast a polling place ballot if they can surrender their vote-by-mail ballot. If the voter cannot surrender their vote-by-mail ballot, they may be entitled to cast a polling place ballot if the precinct board,

a member of a vote center election board, or the elections official can verify that they have not returned their vote-by-mail ballot, and notates that fact in the voter's record to ensure their vote-by-mail ballot is not tabulated. If the voter cannot surrender their vote-by-mail ballot and it cannot be verified that the vote-by-mail ballot has not been returned then the voter has the right to cast a provisional ballot (§§ 3015, 3016, 14310)

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), 3014, 3015, 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 recording electronic voting system (DRE) or any other ballot marking device 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 rosters or voter lists, election date and polling place hours,
  - The correct number of translated sample ballots for all precincts at the polling place in all required languages,

- A sign identifying which languages voting assistance is provided in at that polling place or Vote Center,
- Bilingual poll workers must have a sign, tag or button identifying which language(s) they can provide assistance in,
- Instructions on how to cast a provisional ballot,
- Instructions for mail-in registrants and first-time voters,
- Information on electoral procedure (notices specified in Section 9083.5)
- For partisan primary elections, posters and/or other materials describing the partisan primary election process.
- Information on federal and state laws regarding fraud and misrepresentation (e.g., a sign warning against tampering with voting equipment). (§§ 2300(d)(2), 14105, 14105.1, 14105.2, 14105.3, 14200-14202, 18564)
- Any COVID-19 health-related materials.

Materials in the Polling Place and Voting Booth

- A voter, or any other person, may use an electronic device, including a smartphone, tablet, or other handheld device, at a polling place provided that the use of the device does not result in a violation of Section 14221, 14224, 14291, 18370, 18502, 18540, 18541, or any other provision of the Elections Code. (§ 2302)
- State and federal law do not prohibit voters from bringing the Secretary of State's Voter Information Guide, a county 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. (52 U.S.C. § 21112(a)(2)(C))

Other Rights

Voters have additional rights, depending on the circumstances. Poll workers should be accommodating and flexible to ensure these rights are protected.

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(a)(6), 14224, 14282, 18563)

- County elections officials should train poll workers how to properly record the voters who have been assisted in marking their ballots. (§ 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); § 19242(b))

- Voters with disabilities have the right to an accessible polling place. Poll workers must 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, § 35.136)

- A person with a disability who is unable to write may use a signature stamp (which must be approved by the county elections official or the Department of Motor Vehicles 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 currently determined them to be mentally incompetent and have specifically revoked their right to vote or they are otherwise ineligible because they are currently imprisoned or 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 improperly 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 list 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 voter list, 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 list, they are still entitled to cast a provisional ballot. (§§ 2000, 2101, 2300(a)(1), (2), 14310; Cal. Const., art. II, § 2; HAVA § 303(a)(5); Cal. Code of Regs., tit. 2 § 21017)

- For more information on how train poll workers on how to assist voters with disabilities consider including the "Disability Sensitivity at the Polls" flyer in your training materials. The flyer may be found on the Secretary of State's website at http://elections.cdn.sos.ca.gov/voters-with-disabilities/disability-sensitivity.pdf.

- 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 12.

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 translated sample ballots, including bringing to the voter's attention the availability of alternate language assistance. 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 ballots and voting materials in other languages. (§ 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(a)(8), 12303, 14224)

- Poll workers should also be instructed to respect people from backgrounds different from their own, including those who do not speak English. 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 for any reason, 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

- **Please note: for the November 3, 2020, General Election, all active registered voters will receive a ballot in the mail.**

- Every voter has a right to vote by mail and to register as a permanent vote-by-mail voter. (§§ 3001, 3003, 3201)

- To be counted, vote-by-mail ballots that are returned in person must be delivered to the office of the elections official, any polling place in the state, a vote center, a vote-by-mail drop-off location, or a drop box no later than the close of polls at 8:00 p.m. on Election Day. Vote-by-mail ballots that are mailed must be postmarked on or before Election Day and received by the county elections office that issued it no later than the 17th day after Election Day. Please note that this extension to the 17th day after Election Day applies only to the November 3, 2020, General Election. The voter or a designated third party may deliver the vote-by-mail ballot to the county elections office or the polling place. Vote-by-mail ballots cast after the polls close will not be counted. (§§ 2300(a)(7), 3017(a), 3018, 3020)

- A voter listed as a vote-by-mail voter who wants to vote at the polling place has a right to cast a polling place ballot if they can surrender their ballot. If they can't surrender their ballot they may be entitled to cast a polling place ballot if a precinct board, vote center board, or elections official can verify that they have not returned their vote-by-mail ballot, and notates in their voter record to ensure their vote-by-mail ballot is not tabulated. If they can't surrender their ballot and elections officials cannot verify the vote-by-mail ballot has not been returned, then they have the right to cast a provisional ballot. (§§ 3015, 3016, 14310)

Rights of Elections Observers

- **Please note: for the November 3, 2020, General Election, all observers must wear a face covering.** For further information, see Section 1. F. and the Secretary of State's Election Administration Guidance under COVID-19, which can be found on the Secretary of State's website at: https://elections.cdn.sos.ca.gov/statewide-elections/2020-general/election-admin-guidance.pdf.

- 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 elections

observers, as well as what elections observers 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 list or roster. 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 list or roster and post such information in an accessible location, which is required by law to be completed at least once each hour, up to and including at 6:00 p.m. Counties operating under the Voter's Choice Act should explain their list process to poll workers and explain how to explain and interact with people with questions about the list process. (§14294)

- Poll workers should be made aware that a voter, or any other person, may use an electronic device, including a smartphone, tablet, or other handheld device, at a polling place provided that the use of the device does not result in a violation of Section 14221, 14224, 14291, 18370, 18502, 18540, 18541, or any other provision of the Elections Code. (§ 2302)

Rights of News Media and Pollsters

- Members of the news media and opinion-polling researchers are required to abide by different rules than elections observers. 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 at least 25 feet from the polling place entrance. However, unless allowed by the county elections official, no voter may be photographed, videotaped, or filmed entering or exiting a polling place, or filmed inside the polling place, without their permission. Poll workers should be aware that members of the media should contact the county elections official before the election to prevent any problems or confusion on Election Day. (§ 18541)

- Elections officials should consult with their county counsel's office for county-specific best practices.

B. <u>Poll Workers Should Be Trained in Cultural/Gender Sensitivity</u>

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 religions and how the actions of a poll worker may be viewed differently than intended.

Cultural & Gender 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; people with religious affiliations; people who are elderly; and people who are gender diverse and/or LGBTQ+.

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, are allowed to bring up to two people to help them vote. (§§ 12303, 14224)

- 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 trained on appropriate language to use when speaking to a gender diverse and/or LGBTQ+ voter. For example, if the poll worker does not know what pronoun to use to refer to a voter, the poll worker can politely ask which pronouns the voter uses.

- Voters may present and express their gender in a manner that is different than what may be assumed based on how they are listed on the voter list. A perceived difference between a voter's gender expression and the gender identity displayed in their documentation does not render their identification insufficient. Any doubt as to the sufficiency of proof or a document presented shall be resolved in favor of permitting the voter or new registrant to cast a polling place ballot.

- Poll workers should be instructed that the photo in a voter's photo identification, should identification be required, may not appear to match the voter's current gender expression. This perceived difference does not disqualify the validity of a document establishing proof of residency or identity. Any doubt as to the sufficiency of a proof of a document presented shall be resolved in favor of permitting the voter or new registrant to cast a polling place ballot.

- 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. If necessary, the poll worker should also politely ask the voter for the voter's pronouns to use when referring to the voter. Poll workers may not require proof of identity except under the circumstances outlined in Section 2. 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. (§ 2300(a)(4), California Constitution, art. II, § 7)

- Poll workers should be aware that the Elections Code allows a voter to voluntarily disclose how he or she voted if that voluntary act does not violate any other law. (§ 14291)

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

- **Please note: for the November 3, 2020, General Election, additional display materials should be provided and displayed to ensure the health and safety of poll workers, voters, and observers.**

- Poll workers should be trained how to set up and draw voters' attention to instructional materials, including materials offered in other languages. 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 county 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 eligibility 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 fully accessible, and cannot be made accessible on Election Day, poll workers must be familiar with the procedures for conducting curbside voting. (§ 14282)

- Some polling places may use electronic pollbooks or other portable solutions. Poll workers should receive hands-on training for all such devices.

- Procedures for curbside voting include:

  - Taking the voter list, 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
  - Properly recording the voters who have been assisted in marking their ballots (§ 14283)

Polling Place Set-up

- **Please note: for the November 3, 2020, General Election, polling places must be set up in a manner that helps prevent the spread of COVID-19.**

- For further information, please see Section 1.C., and the Secretary of State's Election Administration Guidance under COVID-19, which can be found on the Secretary of State's website at: https://elections.cdn.sos.ca.gov/statewide-elections/2020-general/election-admin-guidance.pdf.

- 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. Vote centers must have three accessible voting machines. 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. (§ 19242(b); HAVA § 301(a)(3)(B); 4005(a)(2)(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: https://votingsystems.cdn.sos.ca.gov/oversight/ttbr/accessibility-review-report-california-ttb-absolute-final-version16.pdf.

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. 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. (§ 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 county 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 list), 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 elections observers. 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 lists or rosters 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 3: Polling Place Hours

Poll workers should be taught how to open and close polls on Election Day.

Opening the Polls

- On the day of any election, 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.
- <u>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.</u>
- 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 <u>must</u> 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)

November 3, 2020, General Election

- Due to the COVID-19 pandemic, in person voting locations may be operated in a different manner than how they were operated at the March 3, 2020, Presidential Primary Election.
- Based upon Executive Orders from the Governor and amendments to the Elections Code, there are five different methods by which counties can conduct the November 3, 2020, General Election. Poll workers must be provided training on any

changes their county may have implemented for the conduct of the November 3, 2020, General Election.

- The five different methods of conducting the November 3, 2020, General Election are as set forth below.

Method #1: Voter's Choice Act (VCA). VCA counties shall provide at least one in-person voting location per 10,000 registered voters within the county from E-3 through Election Day and are not required to open any vote center prior to E-3. (§ 1601)

Counties are nevertheless encouraged to open vote centers earlier, where feasible and as conditions warrant, to maximize opportunities for voter participation.

The minimum operating hours set forth in Elections Code sections 4005 and 4007 have not been affected by any executive order nor any legislation and remain as follows:

a) From E-3 through E-1, for at least eight hours each day; and

b) On Election Day, from 7 a.m. until 8 p.m.

Methods #2 and #3: Consolidated Polling Place. Counties who choose this method must provide at least one "consolidated" polling place per 10,000 registered voters and operate them using:

Method #2 - vote centers (voter is not assigned to a specific polling location in the county)

- OR -

Method #3 - "regular" polling locations (voter is assigned to a specific polling location)
Consolidated polling places must be made available for voting during the following hours:

a) From E-3 through E-1, for at least eight hours (during regular hours convenient for members of the public) each day; and

b) On Election Day, from 7 a.m. until 8 p.m.

Method #4: Traditional Polling Place. Non-VCA counties that comply with all existing statutory requirements applicable to in-person voting locations on Election Day from 7 a.m. until 8 p.m. (e.g., the same amount of voting locations as were available in the March 3, 2020, Presidential Primary Election, and open only at a minimum on Election Day).

Method #5: All Mail Ballot. Counties continue to conduct the November 3, 2020, General Election as an all mail ballot election.

Section 4: 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 to register and vote at the office of the county elections official between Election Day and 14 days before Election Day. Although the new U.S. citizen should have voted in the office of the elections official, if people identify themselves as new U.S. citizens and are not on the voter list they should be given provisional ballots. In the alternative, the new U.S. citizen may use the conditional voter registration process. (§§ 2170, 3500, 3501)

- The law allows any new California resident to register and vote at the office of the county elections official between 7 and 14 days before Election Day. Although the new resident should have voted in the office of the elections official, if people identify themselves as new residents of the precinct and are not on the voter list they should be given provisional ballots. In the alternative, the new resident may use the conditional voter registration process. (§ 2170 3400)

Certain First-Time Voters

- Under federal law, first-time voters who registered by mail may be required to show identification to vote. 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 list clearly indicates that identification is required. This notation on the voter list will be made when the voter mailed in a voter registration form without providing a driver license number or the last four digits of their social security number and the voter has not subsequently provided the election official with the required identification. (HAVA § 303(b); Cal. Code of Regs., tit. 2 § 20107)

- Poll workers may only ask a voter to provide identification if the voter list 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. Please note that 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.

- Poll workers should explain to those 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. (§ 14310; Cal. Code of Regs., tit. 2 § 20107(c))
- Poll workers should also remind the voter that they can check the status of their provisionally cast ballot by contacting their county elections official.

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 list, may go to the county superior court to compel the county to place them on the voter list. 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 in person to the office of the elections official, or at any polling place, a vote center, a vote-by-mail drop-off location, or a drop box in the state on or before 8:00 p.m. on Election Day. (§§ 2300(a)(7), 3020, 14212);
  2. Appear at their designated polling place on Election Day, or appear at a vote center, a consolidated polling place that offers countywide voting, a consolidated polling place voters have been assigned to, or the regular or satellite office of their elections official where voting is permitted on or before Election Day, and
     - Vote a nonprovisional ballot (a ballot that does not go into an envelope) if either of the following conditions is satisfied (§ 3015):
       a) The voter surrenders their vote-by-mail ballot, or
       b) The voter is unable to surrender their vote-by-mail ballot, but the precinct board, vote center election board, or elections official does all of the following:
          (i) Verifies that the voter has not returned his or her voted vote-by-mail ballot, and
          (ii) Notates the voter's voter record to ensure that the voter's vote-by-mail ballot is not cast or tabulated after they vote at the polls.

- Vote a provisional ballot if (§§ 3016, 14310(f)):

  a) The voter is unable to surrender their vote-by-mail ballot and

  b) The precinct board, vote center election board, or elections official cannot:

     (i) Verify if the voter has returned their voted vote-by-mail ballot, and

     (ii) Notate the voter's voter record accordingly.

  - OR -

  a) The voter is unable to surrender their vote-by-mail ballot and the precinct board or elections official (in a non-VCA county that does not offer countywide voting at a consolidated polling place) cannot readily determine if the voter is in the correct polling location.

- A voter who surrenders their vote-by-mail ballot is not required to surrender their vote-by-mail identification envelope.

- 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 any voter in the state, either from the voter or from a designated third party delivering it for the voter. County elections officials will sort those vote by mail ballots into the proper precinct or forward them to the appropriate California county election official. Designated third parties are any person who is not compensated based on the number of ballots returned 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. (§§ 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)

- In the event a vote-by-mail voter does not sign his or her vote-by-mail envelope, the voter may fill out and timely return an "Unsigned Ballot Envelope Statement" to the elections official, which includes a polling place and a ballot dropoff box. The elections officials should provide "Unsigned Ballot Envelope Statement" forms at all polling places for use by voters. (§ 3019)

- When processing voted vote-by-mail ballots, elections officials are required to compare the signature on the return envelope against the signature(s) of the voter

in the voter's record. If the signatures do not match, the elections officials must notify the voter, who may submit a "Signature Verification Statement" to verify (cure) his or her signature before certification of the election. The "Signature Verification Statement" must be timely returned to the elections official, which includes a polling place and a ballot dropoff box. The elections official should provide "Signature Verification Statement" forms at all polling places for use by voters. (§ 3019)

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 and can't be verified not to have already returned their vote-by-mail ballot. (§ 3016)

Conditional Voter Registration (also known as same day registration)

- Conditional voter registration (CVR) allows voters who did not register before the voter registration deadline to register to vote and vote a provisional ballot. County elections officials must offer CVR and CVR provisional voting at all permanent and satellite county elections offices and at all polling places in the county. (§ 2170, 2171, 14310)

- Poll workers must be fully instructed of the process for conditional registration and the use of provisional balloting for conditional registrants. (§§ 2170, 2171, 14310)

    - If the poll worker can determine a CVR voter's precinct, and the ballot for that precinct is available, the poll worker shall provide the voter with a ballot for the voter's precinct. (§ 2170(e)(1))

    - If the ballot for the voter's precinct is not available, the poll worker may inform the voter of the location of their polling place. (§ 2170(e)(3))

    - If the poll worker cannot determine the CVR voter's precinct, or, if the ballot for the voter's precinct is unavailable, the poll worker shall provide the CVR voter with the ballot that is available at the precinct, and inform the voter that only the votes for the candidates and measures on which the voter would be entitled to vote in the voter's assigned precinct may be counted. (§ 2170(e)(2))

- A voter may be offered a nonprovisional CVR ballot (known as "instant CVR") only if the poll worker can use the statewide voter registration system, to:

    1. Verify that the CVR voter is eligible to register, has not voted in that election, and has not been included on a roster for that election in a non-Voter's Choice Act county,

    2. Update the voter's record to indicate that the voter has voted in that election, and

3. Update the roster to indicate that the voter has voted and shall not be issued another nonprovisional ballot for that election, if the CVR voter appears on the county's roster for that election. (§ 2170(f))

- Conditional voter registration ballot envelopes shall look visibly different from all other ballot envelopes and poll workers should be instructed on the processes and procedures for handling these envelopes. (§§ 2170, 2171, 14310, Cal. Code of Regs., tit. 2 § 20024)

Change of Residence Address Within the County

- Poll workers must be instructed that a voter wishing to update their registration by changing their residence address within the county can submit a written request at a county elections office or polling location. (§ 2119.5)

- Upon submitting this written request, the elections official shall issue the voter either:

  - A nonprovisional ballot if either of the following applies (§ 2119.5(b)(1)):

    1. The voter is at their assigned precinct, the voter's name is found on the roster, and the voter either has not been issued a vote-by-mail ballot or the conditions relating to surrendering their vote-by-mail ballot provided by Section 3015(a) have been met.

    - OR -

    2. The voter appears at a location that is equipped with an electronic poll book or other means to determine the voter's precinct, the location can provide the voter with a ballot for the voter's precinct, the entire county has established connectivity between locations, and the location at which the voter appears verifies that the voter has not cast a ballot at another location for the election and notes in the voter's record that the voter cast a ballot.

- OR -

  - A provisional ballot if either of the following applies (§ 2119.5(b)(2)):

    1. The voter is at their assigned precinct, the voter's name is found on the roster, the voter has been issued a vote-by-mail ballot, but the conditions relating to surrendering their vote-by-mail ballot provided by Section 3015(a) have not been met.

    - OR -

    2. The voter appears at a location, other than their assigned precinct, that is equipped with an electronic poll book or other means to determine the voter's precinct, but the entire county has not established connectivity between locations such that the location is unable to verify that the voter has not cast a ballot at another location for the election.

- Upon receipt of a properly executed written request to change the voter's residence address within the county, the registration of the voter shall be immediately updated, and the written request shall be maintained with the voter's record. (§ 2119.5(c).)

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 roster or any supplemental list 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 or the poll worker cannot verify if the voter has returned their vote-by-mail ballot and mark their voter record. (§ 3016)

    4. In a primary election, the voter list shows the voter is registered to vote in a political party different than the party for which the voter claims to be registered. (§ 14310)

    5. The voter is voting for the first time after mailing in a voter registration form and did not provide a driver 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. (Cal. Code of Regs., tit. 2 § 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(a))

    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 polling place 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 Voter Registration Card. (§ 14311)

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

- 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))

Multiple-Precinct Polling Places

- **Please note: for the November 3, 2020, General Election non Voter's Choice Act Counties can provide at least one "consolidated" polling place per 10,000 registered voters and operate them using:**

  Vote centers (voter is not assigned to a specific polling location in the county). This is Method #2 identified in Section 3.

  - OR -

  "Regular" polling locations (voter is assigned to a specific polling location). This is Method #3 identified in Section 3.

  Consolidated polling places must be made available for voting during the following hours:

  a) From E-3 through E-1, for at least eight hours (during regular hours convenient for members of the public) each day; and

  b) On Election Day, from 7 a.m. until 8 p.m.

- 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.

- It is important for poll workers to understand that ballots may differ between precincts and that each precinct has specific language requirements. This also applies to Vote Centers. A voter from precinct 1 may arrive at a Vote Center and access a ballot or translated sample ballot in multiple languages while a voter from another precinct may arrive at that same Voter Center and only have access to an English ballot. (§§ 14201, 14202).

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
    - Direct recording electronic (DRE) voting system
    - Ballot marking devices
    - 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)

- If ballots are cast using alternative procedures, poll workers should be trained on how to issue the alternative ballots, as well as how to store the ballot once cast.

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, a vote center, 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
- Loitering near or disseminating visible or audible electioneering information near a vote-by-mail drop box

- Poll workers must be aware that a voter may enter the polling location with clothing or a face covering that contains the slogan of a particular candidate. This is not considered electioneering. However, if the voter's face covering does contain prohibited information, the voter should be offered a new face covering by the poll

  worker. For further information, please see the Secretary of State's Election Administration Guidance under COVID-19, which can be found on the Secretary of State's website at: https://elections.cdn.sos.ca.gov/statewide-elections/2020-general/election-admin-guidance.pdf

- 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)

- Poll workers should direct members of the media to contact the county elections official if an issue arises to prevent any problems or confusion on Election Day. (§ 18541)

Early Ballot Retrieval

- Poll workers should be aware that the elections official may direct the precinct board to seal the ballot container prior to the closing of the polls for early ballot retrieval. (§ 14422)

- The Secretary of State has drafted regulations for early ballot retrieval procedures. The regulations may be found on the Secretary of State's website at: http://www.sos.ca.gov/administration/regulations/current-regulations/elections/early-ballot-retrieval

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. An elections contest is handled outside of the polling place via legal channels. Such misconduct includes:

- Discriminating against voters based on race, ethnicity, party preference, 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(a))

- 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 only a member of the precinct board is permitted to challenge a voter. The public does not have the right to make a challenge of any voter. A challenge may be made by a member of the precinct board at the polling place if the member believes the voter:

  - Is not the person whose name appears on the voter list
  - 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. (§ 14310; HAVA § 302(a))

Section 5: Assuring Security of and Troubleshooting Problems with Voting Technology

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, thousands of voting machines used to record and/or tabulate votes, and electronic poll books used in lieu of a paper roster. Therefore, one of the most important aspects of poll worker instruction is voting technology and system security.

To ensure the security of voting equipment used in a polling place or vote center, 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 voting equipment has been, or is being, tampered with or modified in any way. Poll workers should also be taught to inspect voting equipment 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, including election system vendors, to “troubleshoot” voting equipment without proper identification and clear authorization received directly 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 all voting equipment, including how poll workers must secure and account for all ballots, paper record copies, and/or electronically recorded votes. This also includes following procedures for transmitting electronic poll book data back to the county elections office. 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 Equipment 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. (§§ 14422(a)(2),14434, 15202)

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 6: Operation of Voting Technology

To conduct each election properly and efficiently, poll workers should understand the basic operation of the county's voting technology. 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.

Cleaning and Sanitizing Voting Technology

- Poll workers must be trained on the proper procedures for cleaning and disinfecting voting technology to help prevent the spread of COVID-19. Elections officials must provide specific instruction on how to clean and disinfect the technology used at a particular polling location based upon the recommendations of the vendor of the technology. Specific instructions can be found in Appendix A of the Secretary of State's Election Administration Guidance under COVID-19, which can be found on the Secretary of State's website at: https://elections.cdn.sos.ca.gov/statewide-elections/2020-general/election-admin-guidance.pdf.

Standard Use Procedures and Troubleshooting

- As part of the Secretary of State's approval process, voting technology 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 technology they will use on Election Day and how long the training should last, much of which will depend on a voting technology's complexity and how long the equipment has been used in the county.

- If a voting technology has more than one piece of equipment, poll workers should have hands-on training on each piece of equipment. Some voting technology may not require significant training time, and many returning poll workers may already be proficient in the operation of the equipment. Poll workers at locations using a different voting technology 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 technology. 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 voting technology. Poll workers should be aware that each polling place has different types of voting equipment 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 technology'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 equipment. 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 voting equipment. Sometimes, trying to fix a problem without help from the county elections office can create more serious problems or consequences.

Section 7: 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 8: 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 list, 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.