

Pollworker Training Outline – 2020 Presidential General Election

Poll Worker Training Outline Presidential General Election – November 3, 2020

- I) Introduction
 - A) Position Descriptions:
 - 1) Polling Place Lead
 - (a) Supervises all Polling Place staff
 - (b) Provide on-site training
 - (c) Assign Support Staff to their roles
 - (d) Schedule and assign breaks
 - (e) Collect time sheets
 - (f) Responsible for opening and closing procedures
 - (g) Point of contact at the Polling Place
 - 2) Check-In Clerks
 - (a) Process voters at their workstation
 - (b) Look up voters and issue/reissue ballots
 - 3) Polling Place Support Staff
 - (a) Assist voters through process from start to finish
 - (b) Facilitate the voting process
 - B) All materials available on our website www.sbcvote.com
- II) Polling Place Setup and Guidelines
 - A) Initial Setup
 - 1) Leads and Check-In Clerks will set up the Polling Place prior to the first day of in-person voting
 - 2) Time is coordinated by the Elections Office
 - 3) Computers will be set up by technicians
 - 4) Follow the diagrams for setup to accommodate social distancing
 - 5) Full instructions for setup are in the Polling Place Guide
 - 6) Elections Office will check that setup was done correctly
 - B) Ballot Delivery
 - 1) Polling Place Leads will arrive an hour before polls open to accept ballot delivery
 - 2) Designated Drivers drop off the ballots and other materials on a rolling cart
 - 3) Lead will perform inventory when materials arrive
 - C) Arrival Time

All materials available online at www.sbcvote.com.

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- 1) Elections officers are scheduled to arrive 30 minutes before polls open
- 2) Sign in on the time sheet when you arrive
- D) Bilingual Support
 - 1) Voting materials are provided in both English and Spanish
 - 2) Some Polling Places have items translated into Tagalog, Korean, and Mandarin Chinese
 - 3) Bilingual English/Spanish Election Officers are staffed at most Polling Places
- E) Accessibility Equipment
 - 1) The Elections Office delivers all accessibility equipment to the Polling Place
 - 2) Accessibility guidelines are set by the State, and we can meet the guidelines using mitigation equipment
 - 3) Set up all equipment according to the instructions in the Polling Place Guide
 - 4) Some Polling Places require a temporary Braille sign
 - (a) Follow the instructions for setup
 - 5) We provide Curbside Voting at each Polling Place
 - (a) Voters may push the button or call for assistance
- F) Emergency Setup Procedures
 - 1) The Lead will call the Elections Office for information on Emergency Setup
- G) Breaks and Meals
 - 1) Breaks and meals are scheduled
- H) Cell Phones and Electronics
 - 1) Cell phone and Electronics use is prohibited
- I) Opening the Polls
 - 1) Voters must be allowed to vote when polls open even if the setup is not completed
- III) Sequence of Events
 - A) Greeter
 - 1) Welcomes voters
 - 2) Has sign with COVID-19 symptoms
 - 3) Provides masks if needed
 - 4) Directs voters dropping off ballots to the Ballot Reception Workstation

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- (a) Provides blank envelopes if needed
- 5) Directs voters who need new ballots to wait in line
- B) Curbside Clerk
 - 1) Responds to calls for curbside assistance
 - 2) Position the curbside receiver within range of the call button
 - 3) The Curbside Clerk will follow the instructions in their Quick Guide
 - 4) The Voter fills out the Curbside Voter Card and the Curbside Clerk takes this card to the Check-In station to have it verified
 - 5) If everything matches, the Check-In Clerk will issue a ballot, and two Election Officers will take it to the Voter's car
 - 6) Once the Voter has finished voting, two Election Officers will take the ballot to the Inside Ballot Reception Workstation
 - 7) Curbside Voters may also return their Vote by Mail Ballots
- C) Outside Ballot Reception
 - 1) Receives and tallies voted Vote by Mail Ballots outside
 - 2) Uses tally sheet to track Vote by Mail Ballots returned
 - 3) Make sure envelope is completed
- D) Door Monitor
 - 1) Tracks maximum occupancy of the Polling Place
 - 2) Lets Voters in one at a time when the Polling Place is below maximum occupancy
- E) Check-In Stations Traffic Clerk
 - 1) Directs voters to the next available Check-In Station
- F) Check-In Station
 - 1) Voter provides name and residence
 - 2) Check-In Clerk verifies the information in their computer system
 - 3) Issue label and have the voter sign the roster right-side up
 - 4) Offer assistance
 - (a) If no, issue the ballot
 - (b) If yes, offer the ICX
 - (c) If yes, may also have others assist
 - 5) Issue correct ballot
 - (a) Remove stub
 - (b) Give voter the ballot, stub, and a pen
- G) Voting Booth Traffic Clerk
 - 1) Directs voter to the next available booth
- H) Voting Booth Clerk

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- 1) Provides voter disposable secrecy sleeve
- 2) Wipe down booth after voter is done
- I) Inside Ballot Reception
 - 1) Show first voter the ballot box is empty
 - 2) Tally returned ballot using 3 tally sheets
 - (a) Pink – Provisional
 - (b) Green – Vote by Mail
 - (c) White – Regular
 - 3) Will have separate boxes/bags for returns
- J) Exit Door Monitor
 - 1) Tracks voters as they exit
- IV) The Normal Process with Special Situations
 - A) Name Change
 - 1) Voter signs both names in the roster
 - 2) Provide a voter registration card for them to update name
 - B) ID Required
 - 1) The Check-In Clerk will ask for ID only when the voter is marked “ID Required” in the system
 - 2) Clerk will have a list of acceptable forms of ID
 - 3) Do not notate you saw the ID
 - C) Spoiled Ballots
 - 1) Lead will write “Spoiled” on the ballot and put it in the Spoiled Ballot Envelope
 - 2) Voter may only have one ballot at a time and may only receive three ballots maximum
 - D) ICX
 - 1) The ICX is a ballot marking device available at each polling place
 - 2) May be offered to voters at the wrong polling place or wish to use it for accessibility purposes
 - 3) Voter Assistance
 - (a) Up to two people may assist
 - (b) Assistance may not be provided by the voter’s employer, an agent of the employer, or an officer or agent of the union of which the voter is a member
 - (c) Complete Assisted Voter Page
- V) The Provisional Process
 - A) Reasons to vote provisionally

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- 1) The voter is not registered in Santa Barbara County and cannot complete a valid registration at the Polling Place.
 - 2) The Voter is designated as ID required but does not show ID.
 - 3) The Voter is at the wrong polling place and refuses to use the ICX to vote their proper ballot.
 - 4) The voter is marked as having already cast a ballot for this Election and insists on voting.
- B) The Elections Office reviews Provisional Ballots before they are counted
- C) Process
- 1) Issue the voter a provisional ballot in the system and affix the provisional roster label on the roster page. They will have the voter sign in the space provided.
 - 2) Next, they will affix a provisional envelope label to the “Election Officer Completes” section on a provisional envelope.
 - 3) The Check-In Clerk will retrieve a ballot and place a “PROVISIONAL” label over the timing marks, the dotted line around the top edge of the ballot.
 - 4) They will remove the ballot stub and fold the ballot and place the ballot and the stub in the pink-bordered provisional envelope.
 - 5) They will remove the Information Card from the back flap of the envelope.
 - 6) And they will give the ballot to the voter along with the provisional envelope, the ballot stub, the Information Card, and a pen.
 - 7) They will instruct the voter to properly mark their ballot by filling in the ovals, to complete all sections on the front of the envelope, and to return their ballot sealed in the envelope to the Ballot Reception Workstation.
- VI) Closing the Polls
- A) Polls close at the time specified in the County Voter Information Guide
- B) Ballot Consolidation
- 1) Move Vote by Mail Ballots to one Blue Vote by Mail Bag
 - 2) Move regular voted ballots and ICX ballots to Ballot Transport Box
 - (a) Remove stubs
 - (b) Face one direction
 - (c) ICX on top

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- C) Ballot Inventory
 - 1) One of the Leads will complete all paperwork including the ballot inventory
- D) Administrative Return Items
 - 1) Seal the following in the Administrative Return Envelope:
 - (a) Tally sheets
 - (b) Roster sheets
 - (c) Summary Sheets
 - (d) Ballot logs
 - (e) Curbside voter cards
 - (f) Assisted voter logs
 - 2) Lock the unused ballots on the cart
 - 3) Designated drivers will pick up voted ballots, the return envelope, and the cart
- E) Clean Up the Polling Place
 - 1) Bring all outside items inside
 - 2) Tidy up
 - 3) Take out the trash
- VII) Sensitivity at the Polls
 - A) General Information
 - 1) Greet all voters with a smile and a spoken greeting
 - 2) Assist all voters who need assistance
 - B) Language Assistance
 - 1) Use plain language
 - 2) Keep sentences short
 - 3) Rephrase as needed
 - 4) Write things down
 - C) Items for Accessibility
 - 1) Easy Grip Pen
 - 2) Handi-Grip
 - 3) Hand-Lens Magnifier
 - D) Training Materials
 - 1) Review the “Tips for Interacting with People with Disabilities” and “Interacting Respectfully with Transgender, Genderqueer and Gender NonConforming (GNC) People” on our website at www.sbcvote.com
- VIII) COVID-19 Safety Procedures

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- A) Self-Screening
 - 1) Stay home if you exhibit any symptoms of COVID-19, you have been diagnosed with COVID-19 and have not been released from isolation, or if you have interacted with someone who has been diagnosed with COVID-19 and is potentially infectious
 - 2) Call your Polling Place Lead if you are unable to go in to work
- B) Social Distancing
 - 1) Maintain polling place setup which is arranged to accommodate social distancing
 - 2) Maintain proper social distance when interacting with voters and other poll workers
- C) Personal Protective Equipment (PPE)
 - 1) Each poll worker will have PPE specific to their workstation
 - 2) Extra supplies will be with the Polling Place supplies
- D) Messaging
 - 1) Signs will remind voters of the guidelines
 - 2) Stay positive when interacting with voters
- E) Conflict Resolution
 - 1) We cannot deny the right to vote to anyone
 - 2) Voters must be allowed to vote even if they are not wearing a mask
 - 3) Ask voters not wearing masks to wait to the side
 - 4) Treat all voters with courtesy and respect
 - 5) Guidelines
 - (a) Rise above anger
 - (b) Keep your voice calm and your posture confident
 - (c) Do not engage on the underlying issue
 - (d) Remain positive
 - (e) Assist the voter quickly and efficiently
 - (f) Know when to escalate the situation to a Lead, the Elections Office, or the Authorities
- IX) Elections Situations – Electioneering, Poll Watchers, and News Media
 - A) Electioneering is endorsing or promoting a candidate or political issue that appears on the ballot. It cannot be within 100 feet of the polls.
 - 1) Remember that Electioneering also includes verbal comments and as Election Officers, you cannot engage in conversation about

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issues that appear on the ballot, or make political comments of any kind.

B) Poll Watchers

- 1) There may be members of a campaign or just members of the public who are interested in watching the process.

C) News Media

- 1) News Media may conduct exit polls where they interview voters regarding the election 25 feet from the entrance to the Polling Place.