

ELECTION WORKERS AND OFFICIALS



Medina County, Texas
Poll Worker Training
Part 2
October 11, 2023

AGENDA – PART 2

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- Good Customer Service
- If There's a Problem
- Equipment Pickup
- Setting up at Polling Location
- Attire
- Things to Consider
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VOTER IMPORTANCE

Voting is a Privilege, a Right and a Civic Duty.

Our voters are our customers and deserve excellent customer service.

As a Poll Worker, YOU are the face of Elections.

You may be the only person the voter ever sees and interacts with.

GOOD CUSTOMER SERVICE



Greet all voters with a smile and a polite, professional demeanor.



Check in each voter efficiently and correctly.



Keep the wait time as short as possible.



Be patient with the voter and offer an accurate and informative explanation if the voter has any questions.



Keep conversation with the voter to a minimum.



The voter should leave the poll feeling confident that their vote is valued and will be counted.

IF THERE'S A PROBLEM

Address

Address the problem immediately.

Explain

If necessary, explain to the voter what is being done so they are not waiting without knowledge of what is going on.

Use

Use your resources:

- Training materials – from the Elections Office and from this training
- Poll pad – follow the prompts
- Call the Elections Office

EQUIPMENT PICKUP

- The Elections Office will call you to schedule the date and time to pick up equipment.
- Arrange with Alternate Judge and clerks on who will be picking up the equipment and when to meet at location for setup.
- At pickup, Elections Staff will give you a checklist and go over everything that will be checked out to you.
 - voting devices (scanner, controller, duos, duo-go, poll pads)
 - supplies (batteries, cords, office supplies, etc.)
 - elections supplies kit (documents, signs, keys, etc.)

SETTING UP AT POLLING LOCATION



Arrange

Arrange furniture for best set up of equipment.



Set up

Set up all voting devices and plug in batteries.



Power up

Power up all voting devices to make sure they work properly.



Hang

Hang all signs and notices that belong inside where voters can see.

SETTING UP AT POLLING LOCATION

Measure for distance markers (100 ft. in each direction from the entry door) for signs to be placed.

Organize your elections supplies kit.

Fill out as much paperwork as you can in advance.

Secure the location before leaving.



ATTIRE

Business casual attire is required.

Wear comfortable but appropriate clothing and shoes.

No shorts allowed.

No shirts with inappropriate or political sayings and no graphic t-shirts.

You are representing your county so look your best.

Everyone must wear a name tag or official badges while on duty.

THINGS TO CONSIDER

Decide with other poll workers who will bring what snacks, lunches, drinks, etc.

- Not all polling locations are conveniently located close to restaurants or stores. Plan accordingly.

Take lunches and breaks as scheduled by the Election Judge.

Only Election Judges and Alternate Judges are allowed cell phone use inside the polling location.

- Poll workers are **NOT ALLOWED** to use their cell phones inside the polling location.

...MORE THINGS TO CONSIDER

- If there is downtime, poll workers are allowed to bring something to keep busy, as long as it does not interfere with duties.
 - Voters come first
 - **NO ELECTRONICS**

PROCEDURES BEFORE OPENING THE POLLS

1

Arrive on time or early.

2

Put up **OUTSIDE** signs and notices:

- Markers
- VOTE HERE signs
- Curbside signs

3

Check that campaign signs are at the proper distance of 100 ft.

PROCEDURES BEFORE OPENING THE POLLS CONT.



Administer the Oaths.

Constitutional Oath (Election/Alternate Judges)
Statement of Compensation and Oaths (Judges
and clerks initial at top of form)



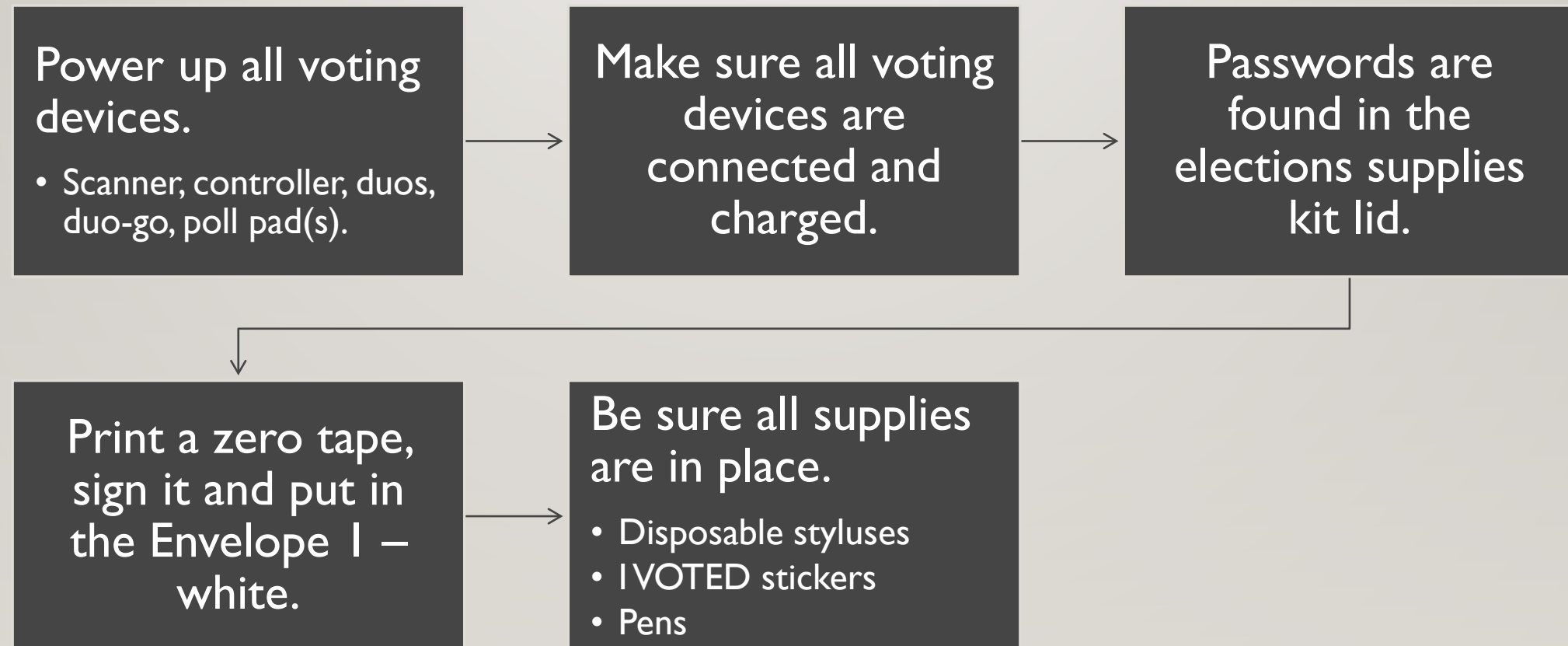
Keep track of your individual times.



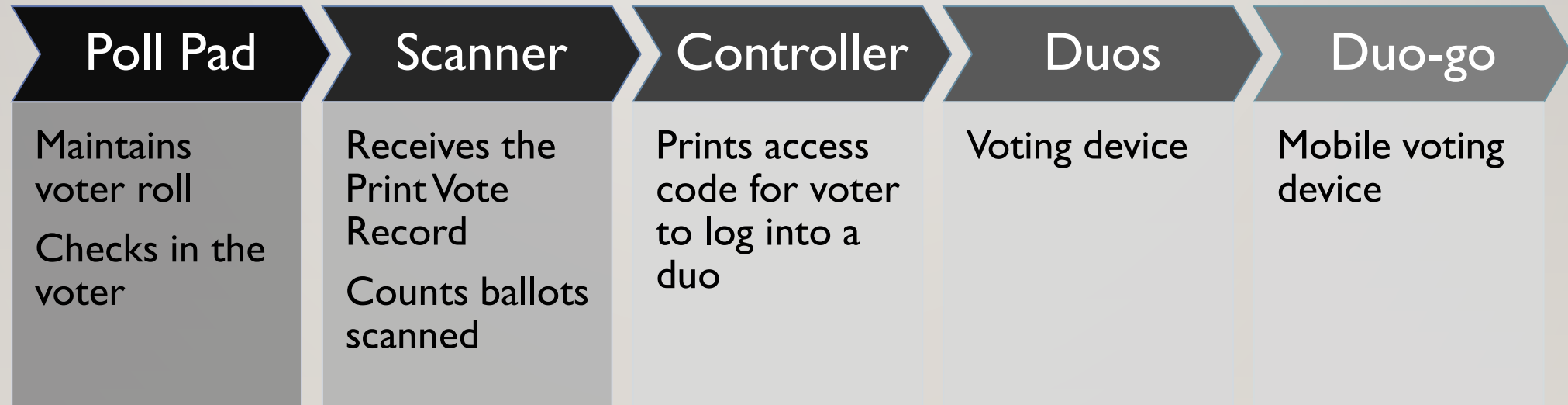
Fill out your Timesheets and
Direct Deposit forms if you
haven't already done so.

Poll workers can be paid up to 14 hours.
You will be paid on the payment cycle the
county is set up on, 1-3 weeks after the
election.

PROCEDURES BEFORE OPENING THE POLLS CONT.



VOTING DEVICES



POLL PAD



POLL PAD

Power up the poll pad.



Connect to either of the 2 hotspots provided.



The poll pad allows the poll worker to verify and check-in the voter.



The poll pad will generate a code with the voter's precinct information which will be used at the controller to print an access code.



Keep poll pad charged at all times.

CONTROLLER



CONTROLLER PROCEDURES

Power up the
controller

Assign booths

Press “Done”

Press “Next”

Press “Print Zero
Tape”

The controller provides
the voter with an
access code to log into
a duo to allow the
voter to proceed with
voting.

OPENING THE POLLS



Use the controller as the official clock.



At 8:00 am (Early Voting) or 7:00 am (Election Day), press "Open Poll".



Enter password (found in election supplies kit lid).



Press "Accept".



The polls are OPEN.



Call the Elections Office every morning to confirm that you have opened successfully.

INSIDE THE POLLS

- When checking in a voter and confirming their information, keep voices low so others don't hear personal information being discussed.
- If there are voters at the voting devices, keep the polling place as quiet as possible.
 - If people are talking, ask them to lower their voices or take their conversations outside.
- Who can go to the voting devices with a voter?
 - A sworn assistant
 - A minor child
 - A person accompanying a voter with a disability

INSIDE THE POLLS CONT.

- **NO ELECTRONICS** of ANY kind.
- Written or paper notes ARE allowed.
- No one except licensed peace officers may carry handguns into the polling place.
 - If in uniform, their badge should be displayed.
 - If not in uniform, ask for credentials.
- Do not influence the voter in any way.
- No electioneering or loitering.

INSIDE THE POLLS CONT.

- On Election Day, remember to post numbers or the count starting at 9:30 am and every 2 hours, thereafter, until 5:30 pm.
 - NOTICE OF TOTAL NUMBER OF VOTERS WHO HAVE VOTED
- No revealing the following information:
 - Names of voters who have or have not voted.
 - Number of votes cast for any candidate or proposition.
 - A candidate's position relative to other candidates.
 - Whether a measure is passing or failing.

OUTSIDE THE POLLS

- No campaigning or electioneering within 100 ft. of the front door.
- No sound amplifying devices within 1000 ft. of the front door.
 - Bullhorns
 - Megaphones
 - Sound trucks

PROCEDURES FOR DISRUPTION



If a problem arises inside or outside the polling location, the Election Judge has the authority of a District Judge to enforce order and preserve the peace.

- De-escalate the situation.
- Call the Elections Office.
- Call the Sheriff's Office.

POLL WATCHER AND THEIR ROLES

A poll watcher is a person appointed to **observe** the conduct of an election on behalf of a candidate, a political party, or the proponents or opponents of a measure or registered voters on behalf of an undeclared write-in candidate.

Must be appointed by:

- A candidate on the ballot;
- A campaign treasurer of a political action committee on a measure on the ballot;
- A political party; or,
- A write-in candidate

POLL WATCHER AND THEIR ROLES CONT.

- Qualifications of a poll watcher:
 - Registered voter of the county;
 - Not a candidate on the ballot;
 - Not an elected public official;
 - Not an employee or immediate relative of election judge/clerk at polling site; and
 - Not convicted of an election offense.

POLL WATCHER AND THEIR ROLES CONT.

- When reporting for service, a poll watcher must provide a certificate of appointment and a copy of his or her certificate of completion of training from the Secretary of State.
- The certificate of appointment must be countersigned by the poll watcher in front of the election judge to verify signatures.
- These documents must be retained and submitted to the custodian of elections after the election.

POLL WATCHER AND THEIR ROLES CONT.

- Once the poll watcher has been confirmed and before being accepted, the election judge must:
 - Administer the poll watcher's oath found in the Handbook for Elections Judges and Clerks; and
 - Provide a name tag
- A poll watcher then “shall **observe** without obstructing the conduct of an election and call to the attention of an election officer any observed or suspected irregularity of violation of law.”

POLL WATCHER AND THEIR ROLES CONT.

- A poll watcher must be permitted free movement and to observe any activity in the polling place to include:
 - Pre-opening and post-closing procedures;
 - Curbside voting activities;
 - A voter being assisted by an election official(s)
 - And inspection of the ballot to determine if it was prepared as per the voter's wishes;
 - Verifying that ballots are being read and/or tallied correctly;
 - Accompanying the election officer to follow the transfer of election materials to elections office.

POLL WATCHER AND THEIR ROLES CONT.

- A poll watcher must not be permitted to the following:
 - Documents previously prepared before his or her arrival;
 - Talk with the judge or clerks except to point out any observed irregularity or violation of law;
 - Converse or communicate with a voter regarding the election; and
 - Watch a voter prepare their ballot or if being assisted by a person of their choice at the voting station.

POLL WATCHER AND THEIR ROLES CONT.

- If a poll watcher observes an irregular occurrence, the watcher may point it out to an election clerk or judge.
 - If the clerk refers the watcher to the judge, the watcher may not discuss the matter further with the clerk unless the judge invites the discussion.

POLL WATCHER AND THEIR ROLES CONT.

- If a poll watcher violates an election law:
 - The election judge or clerk must have observed the violation.
 - Call the Elections Administrator for advice and to report it.
 - Document the violation in writing and in detail (date, time, location, names, witnesses and contact information).
 - The election judge requests the poll watcher to leave the polling location.

POLL WATCHER AND THEIR ROLES CONT.

- Examples of violations of election laws:
 - Speaking directly to, electioneering or discussing the election with a voter within 100 ft of the front entrance of the polling location.
 - Interfering with election clerks' work after the election judge has advised the watcher to bring all issues directly to the judge.
 - Use of electronic devices inside the polling location.

POLL WATCHER AND THEIR ROLES CONT.

- If a poll watcher violates election law and refuses to leave after being asked:
 - Call the Elections Administrator.
 - If necessary, call law enforcement.

QUALIFYING THEVOTER

- Ask the individual for their photo ID.
- CONFIRM (by picture & DOB) that the photo ID is the person standing in front of you.
- In the poll pad, you can either search the person's name as listed on their ID or turn the ID over to scan the bar code.
- Compare the name and DOB.
 - The name must be substantially similar.
- If there is an "S" beside their name, they must fill out a Statement of Residence (blue form).

QUALIFYING THE VOTER CONT.

- The voter may have their Voter Registration Certificate but it is no longer required.
- If the name and DOB match, print a code from the poll pad and have them proceed to the controller.
- The address on their ID and the address listed in the poll pad DO NOT have to match.
 - Confirm with the voter if the address in the poll pad is correct.
 - If it is not correct, have them fill out a Statement of Residence (blue form).

QUALIFYING THE VOTER CONT.

- If the voter does not present a photo ID (offer list of valid forms of photo IDs), there are options.
 - If they have one but not with them...
 - Vote provisional ballot and cure with the Elections Office by the 6th day after Election Day, or,
 - Go home and get their ID to vote a regular ballot.
 - If they do not have a photo ID and cannot reasonably obtain one, they can...
 - Provide a secondary ID (list provided) AND must sign a Reasonable Impediment Declaration to vote a regular ballot.

BRING 1 OF THE 7 APPROVED FORMS OF ID WITH YOU TO THE POLLS.



**Texas Election
ID Certificate***



**Texas Personal
ID Card***



**Texas Driver
License***



**Texas Handgun
License***



**U.S. Citizenship
Certificate with Photo**



**U.S. Military
ID Card***

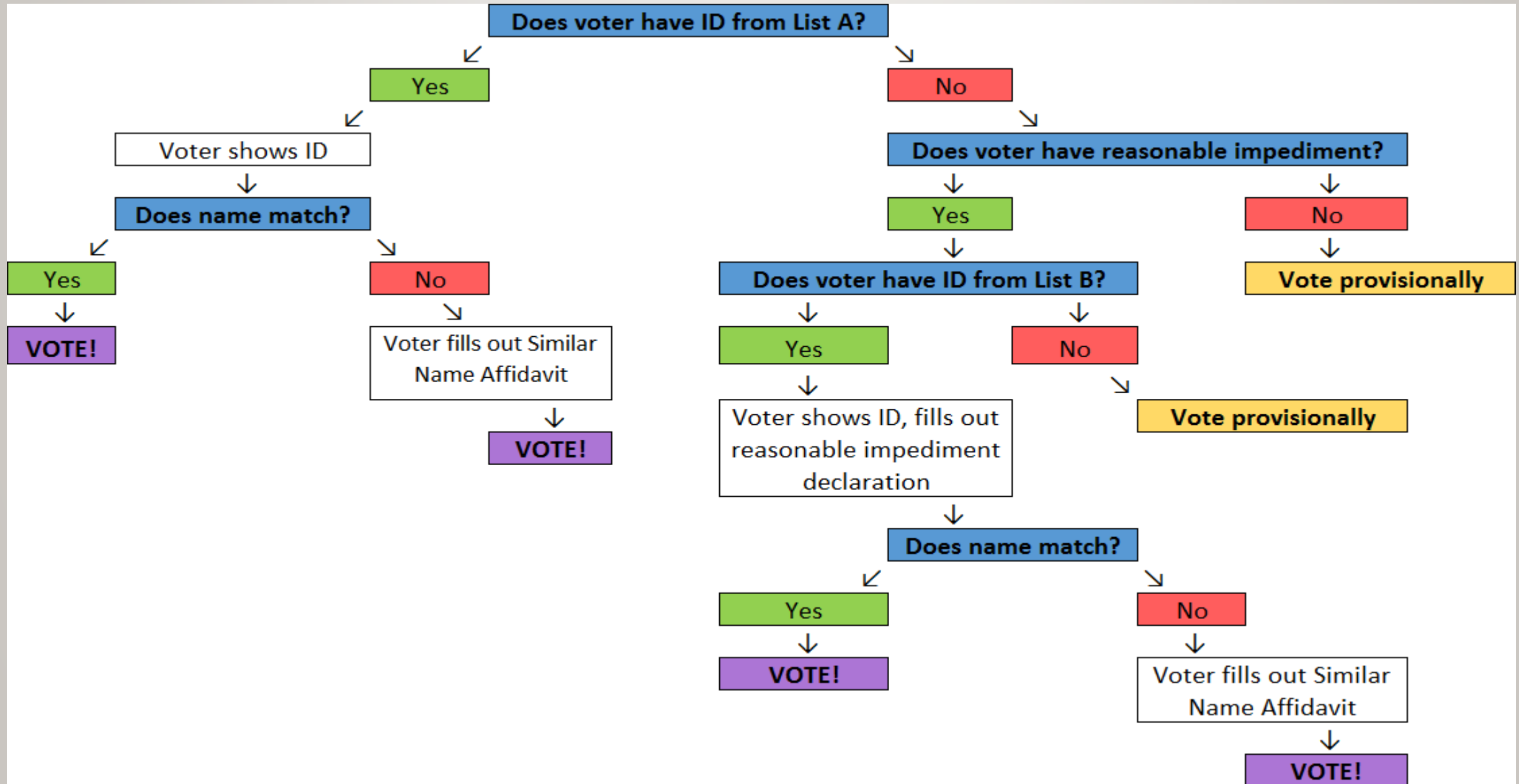


**U.S. Passport*
(Book or Card)**

SECONDARY ID OPTIONS

- Copy of government document with voter's name and address (e.g., voter registration card, driver's license from another state).
- Government check or paycheck (or copy)
- Certified domestic birth certificate (or copy)
- Utility bill (or copy)
- Bank statement (or copy)

QUALIFYING A VOTER FLOW CHART



PROCEDURES IF VOTER RECEIVED A BALLOT BY MAIL

- If they have their mail ballot with them to surrender..
 - Accept their mail ballot (and all mailing material if possible).
 - Voter fills out and signs Request to Cancel Ballot by Mail form.
 - Staple form and ballot together and place in Cancelled Envelope.
 - Process voter and provide a regular ballot.

PROCEDURES IF VOTER RECEIVED A BALLOT BY MAIL

- If they DO NOT have their mail ballot to surrender...
 - They can go home and get it and follow previous procedures, or,
- If they have not received it in the mail yet or do not want to go get it...
 - Voter fills out and signs Request to Cancel Ballot by Mail form and is able to vote a provisional ballot.
 - Advise voter if they receive and surrender their mail ballot to the Elections Office by the 6th day after Election Day, or they do not mail in their ballot, their ballot will be counted.

PROCEDURES FOR A PROVISIONAL VOTER

If it is necessary for a voter to vote a provisional ballot...

- Assign one poll worker to assist the voter.
- Step over to the side with the voter for privacy and not to hold up the line.
- Have the voter fill out and sign the Affidavit of Provisional Voter section of the green envelope (front side).
- Check for completeness and make sure it's **LEGIBLE**.

PROCEDURES FOR A PROVISIONAL VOTER CONT.

- If the voter is registered in Medina County, they can be checked in through the poll pad as a provisional voter.
 - voter who has received a ballot by mail
 - voter who has moved but did not change their address and wishes to vote in new precinct
- If they are not registered in Medina County or at all, have them proceed to the controller.

PROCEDURES FOR A PROVISIONAL VOTER CONT.

- Select PROVISIONAL on the Controller when it asks for Ballot type.
- Controller will give two receipts.
- Tear off the first one and have the voter sign it.
 - This one goes in the green provisional envelope.
- Tear off the second one and give it to the voter.
- The voter may proceed to the voting device.
- After voting, their Print Vote Record **MUST** be returned to the Election Judge to place in the white Ballot Secrecy Envelope and that goes in the green provisional envelope and sealed.

PROCEDURES FOR A PROVISIONAL VOTER CONT.

- The Election Judge must fill out the Election Judge section of the green provisional envelope and SIGN it.
- If the envelope is not signed by the Election Judge, the voter's vote will be INELIGIBLE and not counted.
- Make sure all parts of the envelope are filled out **LEGIBLY**.
- Place green provisional envelope (with print vote record and receipt inside) inside the orange provisional bag.
- All provisional voters must be logged on List of Provisional Voters AND Summary of Provisional Ballots forms.

GENERAL INSTRUCTIONS FOR VOTER

- Any voter may ask any election officer for information on voting procedures or how to proceed with the ballot.
 - Election officers should provide required information in such a way as not to suggest by word, sign or gesture how the voter should vote.
 - It is a Class B misdemeanor offense if an election officer knowingly suggests how the voter should vote.



VOTER ASSISTANCE

- A voter is entitled to receive assistance from a person of his or her choosing.
 - Except their employer, a representative of their employer or their union representative.
- The person providing assistance must take an Oath of Assistance administered by an election officer.
 - If the assistant is also serving as an interpreter, they must take the Oath of Interpreter.

VOTER ASSISTANCE CONT.

- The person is permitted to assist regardless of:
 - The fact that they have assisted another voter;
 - The residence of that person;
 - The citizenship of that person;
 - The voter registration status of that person; or
 - The age of that person.

VOTER ASSISTANCE CONT.

- If a voter needs assistance and does not choose a person to assist him or her, they may receive assistance from 2 election officers.
 - Election officers may provide assistance to a voter without taking the oath.
- Notice of Voting Order Priority states:
 - An election officer shall give voting order priority to individuals with a mobility problem that substantially impairs the person's ability to move around.

CURBSIDE VOTING

- If a voter is physically unable to enter the polling place without assistance or likelihood of injury, he or she may vote at the entrance or curb of the polling place.
- The voter must first be qualified through the poll pad.
- Two election officers will take a duo-go to the voter to cast their vote.
 - Voter assistance rules apply to curbside voting, as well.

CLOSING THE POLLS

Depending on the hours for that day, close the doors at 5:00 pm or 7:00 pm according to the official time listed on the controller.

Anyone in line by those times is still permitted to vote.

Assign a clerk to stand at the end of the line.

No one is allowed in line after those times.

SHUTTING DOWN DURING EARLY VOTING

- At the end of each day during early voting:
 - Make sure the last voter has cast their vote on the scanner.
 - The poll pad must sync before shutting it off.
 - Call the Elections Office at the end of every day and report total votes cast, provisional ballots, spoiled ballots and surrendered ballots, if any.

SHUTTING DOWN DURING EARLY VOTING

- Controller
 - Hit the Menu button.
 - Suspend Polls
 - Enter Suspend password/code provided.
 - The controller will print a Ballot Count report.
 - Tear off that report and place in Envelope 2.
 - On the last day of early voting, print a second Ballot Count report and leave on the controller.

SHUTTING DOWN DURING EARLY VOTING

- Scanner
 - Hit the blue poll worker button located in the back of the scanner.
 - Suspend Polls
 - Enter Suspend password/code provided.
 - The scanner will print a Ballot Count report.
 - Tear off that report and place in Envelope 2.
 - On the last day of early voting, print a second Ballot Count report and leave on the scanner.

SHUTTING DOWN ELECTION DAY

- At the end of election day:
 - Make sure the last voter has cast their vote on the scanner.
 - The poll pad must sync before shutting it off.
 - Call the Elections Office at the end of the day and report total votes cast, provisional ballots, spoiled ballots and surrendered ballots, if any.

SHUTTING DOWN ELECTION DAY

- Follow the same procedures for shutting down the controller and scanner during early voting, except:
 - Close polls
 - Enter Close password/code provided.
 - Print one Ballot Count report and place in Envelope 2.
 - Print a second Ballot Count report and leave on both the controller and scanner.

SHUTTING DOWN ELECTION DAY

- Power off all voting devices.
- Unplug and remove all batteries from devices.
- Neatly put away all cords inside devices.
- Remove all notices and signs from inside and outside the polling place. Remove any residual tape.
- Load all equipment, voting devices and supplies to return to the elections office.
- **Leave the polling place better than how you found it!**

PROCEDURES AFTER CLOSING THE POLLS

- Make sure all the forms, lists and logs have been filled out properly, completely and legibly.
- There are 5 large envelopes.
 - Depending on the election, not all envelopes will be used.
- Each envelope has printed on the outside what belongs inside and who it will be delivered to.
- On the outside of the envelope, fill out the requested information with the election and polling location.

7-72
Prescribed by Secretary of State
Section 66.022, Texas Election Code
9/2023

Returns and Tally List of _____
Election held on the _____ day of _____,
20_____ in Election Precinct No. _____
in _____ County, Texas.

WHITE

ENVELOPE 1

TO: _____
(Title of Presiding Officer of Canvassing Authority)

NOTE TO PRECINCT PRESIDING JUDGE

Enclose in this envelope for retention in your custody:

- 1. Precinct Election results tape(s) or Tally List**

Records of _____ Election
held on the _____ day of _____,
20____ in Election Precinct No. _____
in _____ County, Texas.

YELLOW

ENVELOPE 2

TO: _____
(Title of General Custodian of Election Records)

NOTE TO PRECINCT PRESIDING JUDGE
Enclose in this envelope:

1. Printout of results tape(s) or Tally List
2. Poll List (original) or Combination form
3. Signature Roster or Combination form
4. Precinct Early Voting List
5. List of Provisional Voters (original)
6. Poll Watcher Certificates of Appointment (if presented)
7. Affidavit of Voter Without Registration Certificate Who Is On the Registration List
8. Statement of Compensation (original)
9. Notice of No. of Voters Who Voted During the Day, and
10. Notices of Defective Delivery
11. Oaths of Election Officers
12. Oath of Assistants and Oath of Interpreters

Records of _____ Election
held on the _____ day of _____,
20_____ in Election Precinct No. _____
in _____ County, Texas.

PINK

ENVELOPE 3

PRESIDING JUDGE KEEPS THIS ENVELOPE

NOTE TO PRECINCT PRESIDING JUDGE

Enclose in this envelope for retention in your custody:

- 1. Printout of results tape(s) or Tally List**
- 2. Poll List (original) or Combination form**
- 3. List of Provisional Voters (copy)**
- 4. Ballot Register (copy)**
- 5. Ballot & Seal Certificate (copy)**
- 6. Statement of Compensation (copy)**

VOTER REGISTRATION MATERIAL OF

_____ Election held on the _____
day of _____, 20 _____
in Election Precinct No. _____
in _____ County, Texas.

GRAY

ENVELOPE 4

TO VOTER REGISTRAR

NOTE TO PRECINCT PRESIDING JUDGE
Enclose in this envelope:

- 1. Precinct List of Registered Voters and Supplemental List (if any)**
- 2. Registration Corrections List (if applicable)**
- 3. Affidavits of Voter With Incorrect Certificate Who Is Not on List**
- 4. Statements of Residence (completed)**
- 5. List of ID Voters**
- 6. Copy of Combination Form, if used instead of individual affidavits**

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Prescribed by Secretary of State
Section 32.094, Texas Election Code
9/2023

KRAFT

ENVELOPE NO. 5

(For use in Primary Election)

TO: County Chair

Enclose in this envelope both copies of the statement of compensation.

WHAT TO RETURN TO THE ELECTIONS OFFICE

- All the equipment originally checked out.
 - voting devices (scanner, controller, duos, duo-go, poll pads)
 - supplies (batteries, cords, office supplies, etc.)
 - elections supplies kit (documents, signs, keys, etc.)

ARRIVING AT THE ELECTIONS OFFICE

- The elections staff will receive election judges in the order in which they arrive.
- **DO NOT** go inside until the previous election judge is finished with their delivery OR until you are called in.
- Assistance will be provided for unloading equipment.

ARRIVING AT THE ELECTIONS OFFICE

- The scanner is the most important piece of equipment needed when delivering/unloading.
 - Load that last so it's the first to get unloaded.
- The elections supplies kit with all documents should be hand-delivered to elections staff.
- The orange provisional bag should also be hand-delivered to elections staff.
- When all equipment and supplies are checked in, be sure to sign off on the Chain of Custody form.

We thank you for being with us today and for your time and attention while working the polls.

- Questions
- Ideas
- Suggestions