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# **2014 Professional Practices Program**

## **Simulating Election Day Procedures In Poll Worker Training**

**Franklin County, Ohio**

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Our mission is to “recruit, train and place the best poll workers who are committed to serving voters with excellence and civic pride.” This past election we trained a little less than 4000 poll workers for one of four different jobs. Those four jobs are as follows: Voting Location Manager (VLM), Roster Judge, Paper Ballot Judge and Machine Judge. Over the course of 5-6 weeks our poll workers will attend one class. The weekend prior to the election we have a three-day “Practice Makes Perfect” session where poll workers can show up at their leisure, ask any questions and receive some additional training. We train at several different locations in an effort to accommodate our poll workers. Our training can be broken down into three groups: Machine Training, Paper Ballot/Roster Judges and VLM. All three begin with a “big picture” presentation which covers some job specific information, but mostly it is general information. This comprises payroll, overview of the day, additional training possibilities and any new changes.

Our Machine Judge training is a hands-on experience. In a two hour training period, students will walk through every process that is completed on Election Day. This includes: unloading/loading machines, opening/closing and processing any type of voter they may encounter. At the conclusion of training, Machine Judges will receive an assessment. We use these assessments to determine if poll workers could use additional training

After the presentation, our Paper Ballot and Roster Judges are broken down into small groups, first based on job and then new/experienced. Through hands-on and simulation, poll workers will navigate through the materials and scenarios. First, each student is familiarized with the supplies they will be given on Election Day. Training is very hands-on and as such each student is equipped with the necessary materials to fill out during training in order to simulate what will take place on Election Day. Afterwards, trainers will play the role of the voter and will present the poll workers with several kinds of ID. Our Roster Judges will go step-by-step and process the voter; from asking the voter for their “name and current address” to filling out the Signature Poll Book and filling in the Authority to Vote slip. The Paper Ballot Judge will be instructed, through scenarios, how to have a voter fill out a provisional envelope and how to choose the correct ballot. Similar to the Roster Judges, the Paper Ballot trainees will have provisional envelopes to fill out and even a set of paper ballots to correctly choose the right ballot. Towards the end of training, each group will proceed with closing procedures. Paper Ballot Judges will tally any provisional votes and fill in any record keeping certificates. Roster Judges will count votes and mark the front of the Signature Poll Book. Both groups will also take an assessment.

Voting Location Managers go through total training, including complete Machine Judge training and a portion of the scenarios that Paper Ballot/Roster Judges go through. Moreover, they receive managerial training. VLMs will receive two assessments – a Machine Judge and a combined assessment of Paper Ballot and Roster.

Among the training materials our poll workers receive is the “answer workbook.” The workbook includes every scenario that we cover in our training classes. The workbook displays the identification used by the voter, the address found in the signature poll book and step-by-step instructions on how to process that specific voter. We have voters with a driver’s license, non-photo identification, military IDs, and voters with no ID at all. We include scenarios of name changes, curbside voters, lost voters and 17 year old voter. The workbook is also a total picture for all of our jobs, with the exception of the Machine Judge, on how to process any type of voter they might encounter.

Moreover, we have crafted a manual that breaks down each job and their responsibilities. Each section starts with a checklist of all the materials needed on Election Day and where to locate them. Next, there is a checklist on how to open the polls for your specific job. For example, there is a checklist on how to open and prepare the voting machines for the day; there are also diagrams as to what the Roster and Paper Ballot table should like with all materials laid out in an organized fashion. The Voting Location Manager checklist has completing payroll forms, checking ADA compliancy and instructions on what to do if a poll worker does not show. For our Roster, Paper Ballot and Machine Judges the next checklist demonstrates how to identify and process regular, provisional and voters with disabilities. The Voting Location Manager section includes instructions on how to manage the polling place, including electioneering, challenging voters and even what to do when the voting machines need new paper. The last checklist found in all sections is how to close the polls. Directions on what to do with materials, how to print results tape and break down the machines, as well as how to secure any necessary documents will be found in these checklists. At the end of each section there is an appendix with all the necessary documents that a poll worker might need. Additionally, our manual includes instructions to ensure every location is ADA compliant. Overall, our training manual is a complete picture of what a poll worker should expect on Election Day.

## Instructional Checklist for Machine Trainers

(Revised 2014)

**Allow as many people as possible to actually do a function as you briefly discuss each point**

**Your class should last 1 hour to 1 ¼ hours**

Check/Verify Machine Serial Numbers from list (and correct precinct)	
Remove Red Seals and Unlock cart	
Record red seals on Storage Cart Security Seal Records in Precinct Workbook	
Show contents of Bin 1 and Bin 2	
Remove/Set Up Machine (discuss piggy backing and <b>new 25-ft. extension cord with adaptor</b> )	
<b>Do NOT use wire cutters to cut the ground!</b>	
Discuss importance of checking power cable and power strip light	
Emphasize privacy	
Discuss <b>reset button on back of machine</b>	
Cut and record blue seal on Certificate 1	
Record blue tamper tape seal (on RTAL printer) on Certificate 1	
<b>Note: Discuss tamper proof feature of seals and what to do if a seal has been tampered with</b>	
Record green tamper tape seal (on flash memory card drive) on Certificate 1	
Open machines left to right with Yellow PEB (follow screen instructions!)	
Record public and protective counts on Certificate 1	
Check that <b>correct times/dates</b> display on each machine!	
Put away Yellow PEB until end of day	
Make sure that black power cable and gray RTAL printer cable are secure	
Explain use of ATV Envelope (attach to Machine, place ATV slips inside, keep track of Fleeing Voters and ADA Provisional Voters using tick marks in the appropriate boxes)	
Vote with Blue PEB – at some point during the voting process, change the time on the machines to reflect after 7:30 PM to be able to show what the screen looks like when the Blue PEB is inserted (“Exit this Menu” vs. “Close the Polls”)	
Show voting on a regular ballot	
<b>Explain “Issues Only” vs “Non”</b>	
<b>Show voting a provisional voter</b> (discuss new Voted Ballot Bag to place Blue Envelope in)	
Show voting a write-in candidate	
Show canceling a ballot	
<b>Explain audio ballot feature (<a href="http://www.ohiovote.com">www.ohiovote.com</a>)</b>	
Explain use of Election Day Balance Sheet during one of the voting scenarios	
Put away Blue PEB	

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Get Yellow PEB	
Close machines from left to right/ <b>Remind students that flash card is not to be pulled until after both results tapes have been printed and it's confirmed all machines are closed</b>	
Record required items on Certificate 2 (including ADA Provisional count(s))	
Restart the last Voting Machine w/ Yellow PEB and follow onscreen instructions. <b>Emphasize need to wait for "Stop Light" or "Christmas" screen before removing the RTAL printer cable and attaching the portable printer cable.</b>	
Run results tapes (2)	
Record the Protective and Public counts on Certificate 2	
Distribute 2 copies of results tapes (at window and in VOTR)	
Remove flash memory cards from ALL machines	
Put election results in VOTR BOOK (1 copy of results tapes, flash memory cards, and PEBS)	
Seal each Voting Machine with blue seal and record seal numbers on Certificate 2	
Collapse machines and put them on the cart	
Place machine related supplies in Bin 2 of cart (printer, etc.)	
Remove Red Seals for locks from Cake Box and <b>record</b> red seal numbers on Storage Cart Security Seal Records	
Secure machines in cart with locks, and place red tamper tape seals on locks	
Give VOTR Book and other Election materials that must be returned to VLM (Yellow Triangle)	

# Machine Judge Assessment

## RETURN TO TRAINER

Name: \_\_\_\_\_

Trainer: \_\_\_\_\_

Location: \_\_\_\_\_

Date: \_\_\_\_\_

1. Which PEB (color) do you use for the following actions?

Process Voters **BLUE**

Open/Close **YELLOW**

2. What time does the 1<sup>st</sup> machine need to be open and ready for the voter? **6:30 AM**

3. If the precinct identifier on the ATV isn't listed on the screen, what should you do?

- a. Pick the closest one that is listed
- b. Ask the voter which one they want to vote
- c. **Go to the Roster Judge and look it up again**
- d. Tell the voter they are in the wrong location and cannot vote

4. If the voter says that the wrong ballot is showing on the screen, what should you do?

- a. Tell them to go ahead and vote the ballot they have
- b. Tell the voter it is too late to change the ballot
- c. Have them vote, cast and confirm and then bring up the correct ballot
- d. **Cancel their ballot and choose the correct one**

5. After a voter has cast and confirmed their vote, they inform you they voted the wrong ballot. To correct this situation you bring up the correct ballot and let them vote again.

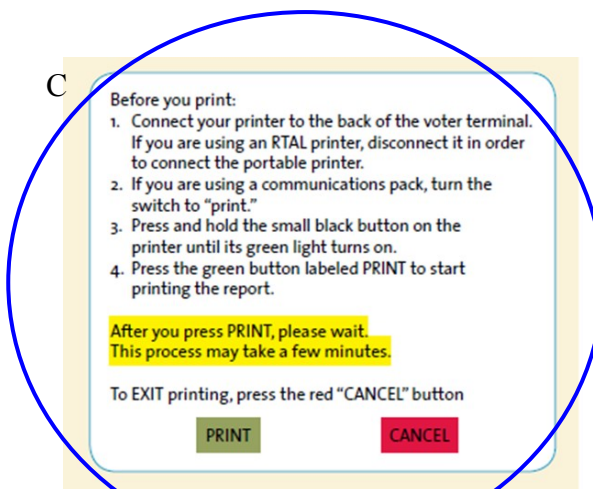
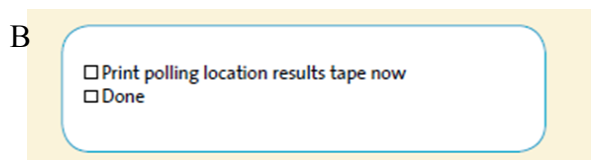
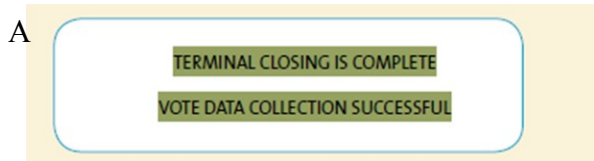
True

**FALSE**

6. When is it okay for a Machine Judge to cast and confirm a vote?

- a. When a voter forgets to cast and confirm (fleeing voter)
- b. When a voter asks the Machine Judge to do it for them
- c. To clear the machine screen and bring up another ballot
- d. **A Machine Judge should never cast and confirm**

7. When do you hook up the portable printer to the voting machine to print the results tape? Choose the screen that you will see right before you should hook up the printer. Please circle one.



8. When do you take the flash card out of the machine?

- a. After the last voter has voted
- b. Do not remove, leave in the machine
- c. **After both results tapes have been printed and it's confirmed that all machines are closed**
- d. Immediately after each machine has been powered down