



# Making Poll Worker Training More Effective

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# Topics of Discussion:

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**Flow of Voters at the Polling Place**

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**Qualifying the Voter at the Polling Place**

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**Importance of Completing Paperwork**

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**Early Voting Best Practices**

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**Election Day Best Practices**

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**Training Reminders**

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**Verbal De-Escalation Tactics**



# Flow of Voters at the Polling Place

Setting up Polling Place for flow of Voters

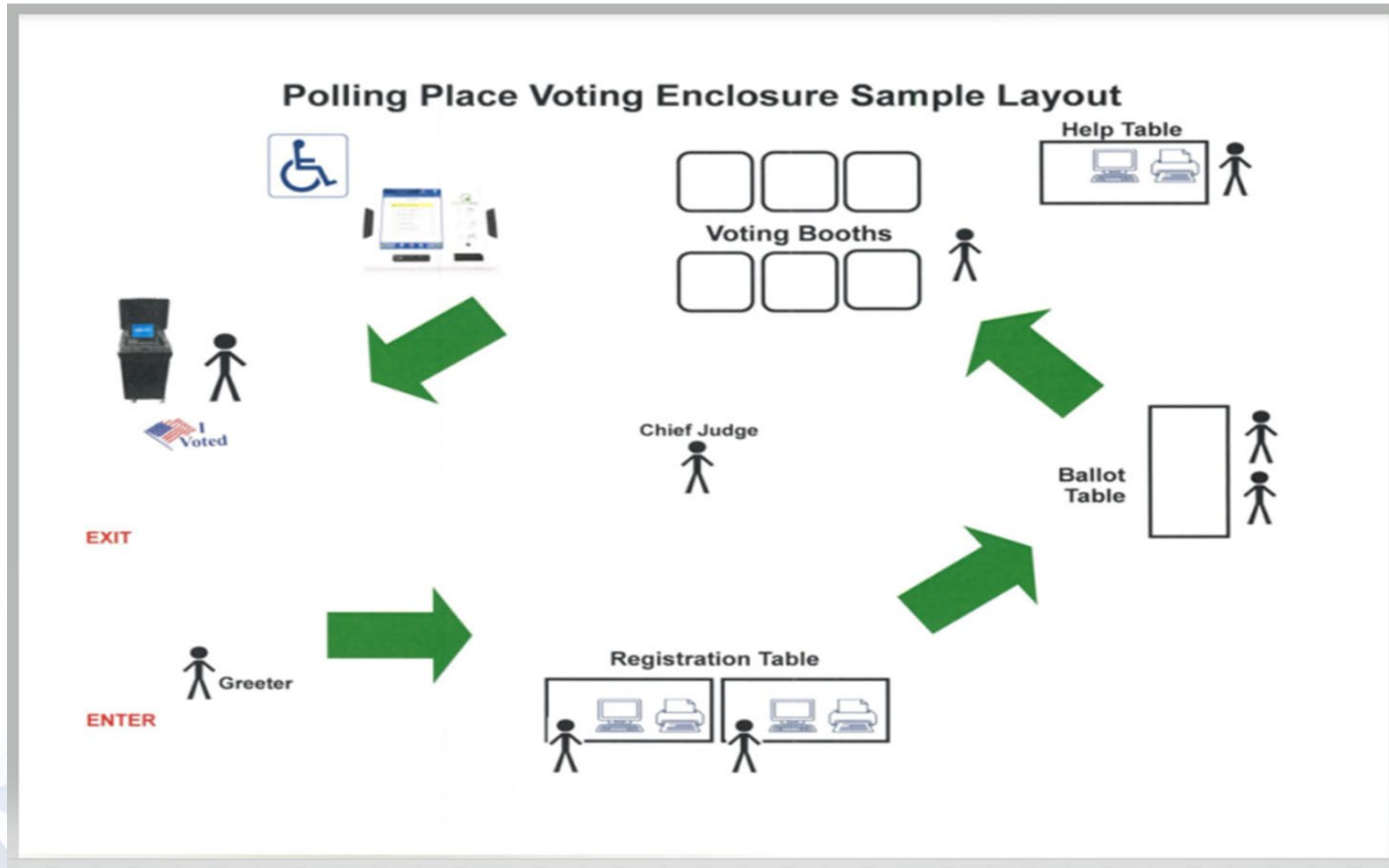
Line Management

Voter Etiquette

Qualifying Voters

Verbal De-Escalation





Arrange the room so that voters are not overcrowded and the voting site is ADA compliant.

Try to make a separate entrance and an exit, if possible

Place the ballot box near the exit and make sure there is a person stationed there to remind voters to put their ballots in the box.



## Create a station for voters to complete extra paperwork, if necessary

- Consider calling it the Resolution Table
- Provide an extra ePollbook, if possible, for the Deputy Early Voting Clerk/Judge to perform the more complicated procedures.
  - Cancelling a Ballot by Mail
  - Qualifying a Provisional Voter
- Keep the station organized
- Keep forms together that involve a certain processes



**Note:** If an extra ePollbook is not an option, place the voter in the front of the line when the paperwork is completed.



## Practice Timing your check-in process in Training

- Voting stations should not be empty because voters are not qualified fast enough
- When voting stations are full, slow down so that voters are not waiting for a voting station



# Why is Line Management Important?

- Voters can receive information while waiting
- Identify Voters eligible for Voting Order Priority
- May help reduce waiting times
- Allows voters to ask questions
- Allows poll workers to identify electioneering



## Best Practices for Line Management:

Designate a worker to walk the line from beginning to end regularly



Talk to a group in the line, so you are not repeating the same thing to each individual voter in line



Determine voters who are eligible for Voting Order Priority



If line is long, point to the list of 4 closest vote centers, if countywide





## Information to Review in Line:

Having the Acceptable forms of ID available when they get to Check-in

- Consider making a one page guide of acceptable IDs to have on hand

Silencing cell phones and explain the use of cell phones is not allowed in the polling place

- If a voter has a cheat sheet on a cell phone, provide a sample ballot to transfer the notes

Determine if voters are at the correct precinct

- Consider providing a paper list of registered voters

Distribute sample/bedsheet ballots

- Provide enough copies to be able to hand out

Talk about county website feature to print voter's own sample ballot, if available

- Consider creating an informational card for the elections office that includes the website address

During Early Voting, determine if eligible for a Limited Ballot

- Consider creating an informational card with a map to the main early voting location

The word *please* goes a long way!

Look voters in the eye and greet them.

Think about how you want your own voting experience to take place.

Use non-technical language so voters can understand

Use action words to help voters understand what to do

- *Verify* your information please
- *Sign* here please
- *Proceed* to the voting station
- *Put* the ballot in the ballot box



**Example 1:** If a voter is wearing a medical mask and identity cannot be determined, politely ask the voter to briefly lower the mask for a moment.

- “Please lower your mask for a brief moment so I may compare you to your picture.”

**Example 2:** If a voter is using a prohibited wireless device.

- Approach the voter quietly. Do not yell across the room.
- “Pardon me, you probably didn’t know that state law prohibits the use of wireless devices in the polling place. Please cease use of the device until you exit the polling place.”



**Example 3:** If a voter has a firearm.

- “Pardon me, you probably didn’t know that state law prohibits firearms in the polling place. Would you please take the firearm to your vehicle. I’ll put you right back in line where you were.”

**Example 4:** Electioneering:

- “Pardon me, you probably didn’t know that state law prohibits the wearing of campaign T-Shirts or other political attire related to the current election. Please cover or remove it to best of your ability.”



# Qualifying the Voter at the Polling Place





During qualification, ask questions if there are special situations

Don't steer voters into a process, give options

- If a voter left the ID at home, explain that he or she can go home to retrieve it, or cast a provisional ballot and cure the ID deficiency after voting.
- If a voter wishes to cancel a ballot by mail but does not have possession of the official ballot, explain that the voter can vote provisionally or go home and get the ballot by mail to surrender.

Let voters decide for themselves.



Make sure that you determine if the voter still lives at the address that is displayed in the ePollbook or Paper List of registered voters

The address on the acceptable form of ID presented, does not have to match the registration address.

Don't assume that the address on the ID presented is the registration address. You must verify.

If the voter is in suspense, a Statement of Residence must be completed even if the voter says that he or she still lives at the registered address.

Failure to gather the correct information could result in a voter's registration being cancelled in the future



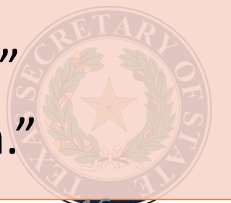
How should a voter be told that he or she does not live in the territory covered by the election?

Don't say "ineligible"

- Ineligible sounds as though there is something wrong with the voter's registration

Suggested phrasing for poll workers:

- "Your registered address does not fall within the boundaries of any of the territories in the current election."
- "This is not a countywide election and your address is not included in the current election."
- "The portion of the county where you live has nothing on the ballot in the current election."



## When Entities Conduct Elections Separately

- If a political subdivision does not contract with the County Election Official, it may choose to run its own election
- Many of the large political subdivisions, such as school districts, own their own voting systems
- There are times when voters must go to multiple places to vote in all the elections for which they are eligible.
- It is okay to tell voters about the other elections, however, literature or other information is not required to be made available.



# **Importance of Completing Polling Place Paperwork When Processing a Voter**







Always complete the required paperwork BEFORE the voter is issued a ballot



SORs (Statement of Residence) must be completed before the voter receives a ballot



Provisional Paperwork must be fully completed before the voter receives a ballot





Poll workers should complete their portion of the paperwork before the voter receives a ballot

- What??? It is important to fully complete and file all paperwork throughout the day. Set up the envelopes for filing so that there isn't a ton of unfiled paperwork when it is time to close polls
- If there are problems reconciling numbers or other issues, don't let poll workers stay at the polls trying to solve them. Teach them to come to election night headquarters so they can be helped.

## Consequences of incomplete paperwork

- Voter may refuse to complete the paperwork after voting
- Voter does not live in the political subdivision and shouldn't have cast a ballot in your county, city etc.
- The voter is now gone and there is an issue that can only be resolved with the voter present
- Election Officials forgot to complete the paperwork and now have to come to the entity's office and sign/complete it (possibly on election day)
- Voter is disenfranchised because of election worker error (unsigned Provisional Envelopes)
- If an audit occurs, the records for the election may be incomplete
- If a public information request is received, the requestor may receive incomplete records.



- Notices to Provisional Voter
  - Notice of ID Deficiency 
  - Regular Notice 

9-1  
 Prescribed by Secretary of State  
 Section 65.059, Texas Election Code  
 9/2023

## Notice to Provisional Voter

A determination whether your ballot will be counted will be made by the early voting ballot board after the election. A notice will be mailed to you within 30 days of the election at the address you provided on your affidavit to vote a provisional ballot indicating either (1) that your ballot was counted or (2) if it was not counted, the reason your ballot was not counted.

Your affidavit will be retained by the voter registrar who will use the information on the affidavit to update your voter registration information or if you are not a registered voter, the affidavit will be submitted to the voter registrar as a new voter registration application.

If you have any questions, call the Secretary of State's Office toll free 1-800-252-VOTE(8683).

9-2  
 Prescribed by Secretary of State  
 Sections 63.001(g), Texas Election Code  
 9-2023

### NOTICE TO PROVISIONAL VOTER

(For provisional voter that did not (1) present an acceptable form of photo ID and (2) complete a reasonable impediment declaration)

A determination whether your ballot will be counted will be made by the early voting ballot board after the election. A notice will be mailed to you within 30 days of the election at the address you provided on your affidavit to vote a provisional ballot indicating either (1) that your ballot was counted or (2) if it was not counted, the reason your ballot was not counted.

If you are voting in the correct precinct, **in order to have your provisional ballot accepted**, you will be required to visit your local county voter registrar's office (information below) within **six days of the date of the election** to either present one of the below forms of photo ID OR if you do not possess and cannot reasonably obtain one of the below forms of photo ID, execute a Reasonable Impediment Declaration and present one of the below forms of supporting ID OR submit one of the temporary forms addressed below (e.g., religious objection or natural disaster exemption) in the presence of the county voter registrar OR submit the paperwork required to obtain a permanent disability exemption. The process can be expedited by taking this notice with you to the county voter registrar at the time you present your acceptable form of photo identification (or if you do not possess and cannot reasonably obtain one of the below acceptable forms of photo ID, execute your Reasonable Impediment Declaration and present one of the below forms of supporting ID, or execute your temporary affidavit or provide your paperwork for your permanent exemption); however, taking this notice is not a requirement.

**Voter must appear before Voter Registrar by:**

\_\_\_\_\_

Date

**Acceptable Forms of Photo Identification**

- Texas Driver's License issued by the Department of Public Safety (DPS)
- Texas Election Identification Certificate issued by DPS\*
- Texas Personal Identification Card issued by DPS;
- Texas Handgun License issued by DPS;
- United States Military Identification Card containing the person's photograph;
- United States Citizenship Certificate containing the person's photograph; or
- United States Passport (book or card).

\*If you do not have another acceptable form of photo identification you may apply for a free Election Identification Certificate at your local Texas Department of Public Safety office.

With the exception of the U.S. citizenship certificate, the identification must be **current** or, for voters aged 18-69 years, have expired no more than 4 years before being presented for voter qualification at the polling place. A person 70 years of age or older may use a form of identification listed above that has expired if the identification is otherwise valid.

**Reasonable Impediment Declaration:** If you do not possess one of the forms of acceptable photo identification listed above, and cannot reasonably obtain such identification, you may execute a Reasonable Impediment Declaration and present a copy or original of one of the following supporting documents: (1) a government document that shows your name and an address, including your voter registration certificate; (2) current utility bill; (3) bank statement; (4) government check; (5) paycheck; or (6) (a) a certified domestic (from a U.S. state or territory) birth certificate or (b) a document confirming birth admissible in a court of law which establishes your identity (which may include a foreign birth document).

The address on an acceptable photo identification or a supporting document does not have to match your address on the list of registered voters.

**PERMANENT EXEMPTION**

During the cure period, voters with a disability may apply with the county voter registrar for a **permanent exemption** to presenting an acceptable photo identification or following the Reasonable Impediment Declaration procedure in the county. The application must contain written documentation from either the U.S. Social Security Administration evidencing the applicant's disability, or from the U.S. Department of Veterans Affairs evidencing a disability rating of at least 50 percent. The applicant must also state that he/she does not have a form of identification prescribed by Section 63.0101 of the Texas Election Code. Those who obtain a disability exemption will be allowed to vote upon display of their voter registration certificate reflecting the exemption.

**TEMPORARY EXEMPTION**

During the cure period, a voter may apply for a temporary exemption at the county voter registrar's office for voters who have a consistent religious objection to being photographed **OR** who do not present an acceptable form of photo identification listed above or follow the Reasonable Impediment Declaration procedure because of certain natural disasters as declared by the President of the United States or the Texas Governor.

\_\_\_\_\_ County Voter Registrar's Office  
 (Insert Address of Voter Registrar's office here)

(Insert Map to Voter Registrar's office here.)

**Completed by Polling Place Official:**

Voter's Last Name: \_\_\_\_\_

Voter's First Name: \_\_\_\_\_

VUID #: \_\_\_\_\_

Precinct No. \_\_\_\_\_



## Notice of ID Deficiency

- Notice of ID Deficiency is only given to voters who had no form of ID at the time they presented to vote.
- This notice must have a map to the voter registrar's office so that the voter may cure the ID deficiency within 6 calendar days after election day.
- There is a space to write the cure deadline, information about what forms of ID are acceptable and how to apply for a permanent or temporary exemption

## Regular Notice

- The Regular Notice to Provisional Voter is given to all other provisional voters
- Informs voter of the process for notification of outcome of provisional vote
- Informs voter of the way in which the data will be used to update an existing registration or create a new registration if one did not already exist for the voter in that county





# Early Voting Best Practices



Consider creating an opening, daily & closing the polls checklist that is used every day of Early Voting

Some counties take a photo of their daily balancing numbers and send it to the election office at end of night.

Include all necessary security measures so that voting equipment is secure before the polling place is closed for the night

If checklist references certain devices or places, be sure to include a diagram

No one, save that of the election workers should have a key to the room, if possible



Number of Ballots Stock Received Start of Early Voting  

Prescribed by Texas Secretary of State  
Section 66.004, Texas Election Code  
2/2022

## Tuesday, February 20, 2024– Opening the Polling Place Checklist

### Cell Phone in Polling Place:

- Turn on the designated cell phone(s) to communicate with the authority conducting the election.
- Keep a list of important contacts readily available (if applicable).

Note: Cell phones in the polling place can ONLY be used for official election purposes.

### Assign jobs to Poll Workers

- Judge – Break seals and unlock DS200, pass off key to Alt Judge
- Alt Judge – Unlock and sign on to ExpressVotes
- Clerks – Sign on Kiosk and Do Posting
- Oaths and Time Sheets

### Required Postings:

ALL postings must be visible to the voter. Place each posting in its required area if instructed by your authority conducting the election. Pay close ATTENTION as you are positioning the postings and ensure that they are placed where they can be viewed at all times and not hidden by doors when propped open/closed. Instruction posters must be printed in English, Spanish, and any other required languages; if separate posters are used, you must post the postings side by side (see Texas Election Code 272.005(a)).

### ExpressVotes:

All equipment will already be setup for you,

- Verify all serial #'s on equipment sheet.
- Find your surge protector and make sure power is on all devices.
- Follow instructions provided by your authority conducting the election to turn on EXPRESSVOTES.  
**SEE THE BACK POCKET OF ORANGE TAB #2**
- Set up privacy panels around each EXPRESSVOTE, Make sure write in candidate posting is visible.
- Verify date and time.
- Make disability tools readily available. (E.g. headphones and toggle/extended remote)

### DS200:

- Verify Seal #'s are correct. JUDGES BREAK LID SEALS ONLY
- Turn on DS200 using instructions **SEE THE BACK POCKET OF RED TAB #1**
- Verify public count is **ZERO**.
- Print zero tapes and verify each candidate or measure on the tape is set to zero.
- Election officials who are present must verify and sign the zero tapes printed. If poll watchers are present, up to two poll watchers may sign the zero tape.

### Setup Forms/Supplies

#### Kiosk:

- Verify serial from equipment sheet.
- Make sure the surge protector power button is on.
- Hotspot/WiFi
- Place in area that has best cellular signal to connect to kiosk.
- Plug hotspot into nearest power outlet and monitor throughout the day.
- Once your kiosk is connected to all of its devices **SEE THE BACK POCKET OF YELLOW TAB #3 AND GREEN TAB #4**
- Log into laptop using assigned logins and passwords.
- Prepare the ballot stock for voting.

### Evaluate the Polling Place for ADA Compliance

- If parking is available, one parking space must be van accessible and marked as disabled parking.
- The accessible parking spaces should be closest to the polling area.
- The polling place may not have any barriers that impede the path of a voter with a physical disability, such as gravel, automatically closing gates, and closed doors without lever-type handles.
- There must be a route of travel that does not require the use of stairs.
- All inaccessible doorways must have disabled access postings indicating the location of the nearest accessible entrance. If applicable, set up a door bell to alert poll workers if nearest accessible entrance is far away from the voting area.
- The door handle must be operable with a closed fist.
- Disabled access postings must be posted designating the path of travel to the voting area.
- Provide extra seating for voters with disabilities.
- If anything protrudes more than 4 inches from the wall and does not contact the floor, you must put a cone on the floor for safety.
- An accessible table has a surface height of no more than 34 inches and no less than 28 inches above the floor. At least 27 inches of knee clearance must be provided between the floor and the underside of the table.
- For more information on ADA compliance, see <https://www.ada.gov/votingchecklist.htm#toc3>.

Open the polls. The official time to open the polls to check in the first voter is at 8:00 a.m.

Thank you for serving and you are now ready for your first voter!

I \_\_\_\_\_, Presiding Judge, on this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

certify that \_\_\_\_\_ polling place complies with all applicable laws and procedures according to the above checklist.

\_\_\_\_\_  
Signature of Poll Worker

\_\_\_\_\_  
Printed Name of Poll Worker

\_\_\_\_\_  
Signature of Poll Worker

\_\_\_\_\_  
Printed Name of Poll Worker



## EARLY VOTING - DAILY REPORTS

Tuesday, February 20, 2024

March 5, 2024 Primary Election

TODAY'S DATE

ELECTION

POLLING PLACE: Main Early Voting Location – Athens, Texas

### START OF THE DAY – OPEN POLLS

#### EARLY VOTING TIMELINE FOR MAINTAINING POLLING PLACE

##### Monitor at ALL Times:

If you experience long lines of voters, do not let voters stand idly in line. Get them involved. Assign an election worker to:

Work the line of voters –

- Hand out Sample Ballots;
- Issue Statements of Residence to voters who have moved.
- Ask voters to have an approved form of ID ready for the check-in table. Remind voters that they are not able to use wireless devices in the polling place.
- Ask them to mark their ballot choices on paper if they are stored on their cell phone or tablet. Unless voter is using an assistive device for a disability.
- Monitor voters in line to make sure they are not electioneering. (E.g. clothing, hats, or pins)

9 a.m. –

- Clarify any discrepancies (if any) between the number of voters on kiosk and the Public count on DS200 using accountability boxes on next page.
  - Account for all Spoiled and Cancelled Ballots, if applicable.
  - Account for all ballots recorded, if applicable.
- Check power status on all of the EXPRESSVOTES.
- Check battery status on the KIOSK, Tablet or laptop
- Make sure that booths are free of trash and voting materials.
- Ensure that the polling place is accessible for all voters.
- File all affidavits and forms in their appropriate envelopes.
- Tidy your work area.

11 a.m. (Follow 9 a.m. checklist)

1 p.m. (Follow 9 a.m. checklist)

3 p.m. (Follow 9 a.m. checklist)

4:30 p.m. (Follow 9 a.m. checklist)

- Start picking up trash in the polling place and getting things organized for closing the polls. However, don't take things down just yet; you must leave all postings and signs up until the last voter leaves.
- Double check that all forms are fully completed and filed in the correct envelopes.

5:00 p.m.

- Send a Clerk to mark the end of the line. No other voters are allowed to get in line after 5:00pm.
- See instructions outlined in the "Suspend Polls Checklist".

Seals Removed: \_\_\_\_\_

Number accountability check

TIME	DS200	KIOSKS	VOTERS IN POLL	Difference
Start of Day			N/A	
9:00 AM				
11:00 AM				
1: 00 PM				
3:00 PM				
4:30 PM				
End of Day			N/A	

Last Voter Checked In: \_\_\_\_\_

### END OF THE DAY – SUSPEND POLLS

Tuesday, February, 20 2024

Check In Total: \_\_\_\_\_

DS200 Total: \_\_\_\_\_

DS200 Seal No.: \_\_\_\_\_

Blank Ballot Box Seal No. \_\_\_\_\_

Total Provisional Ballots Today: \_\_\_\_\_

TOTAL Paper Ballots Spoiled Today: \_\_\_\_\_

TOTAL SIGNATURES ON COMBO FORM Today: \_\_\_\_\_

Provisional Box Opened? Old/New Seals: \_\_\_\_\_

- Turn off All Express Votes;
- Bring in Flags and Curbside Signs
- Lock and Seal DS200

\_\_\_\_\_  
PRINT Head Election Worker Name

\_\_\_\_\_  
SIGNATURE Head Election Worker.

*Put all of today's Receipt Tapes and Broken Seals inside daily envelope*

*Seal and Place in Clear Plastic Envelope*



Review all Early Voting daily paperwork when it comes back to the office at the end of the day

If paperwork is not picked up daily, consider implementing a post-Early Voting process

When daily paperwork is reviewed, it allows the county or entity to identify potential problems and take action

Examine all paperwork so that issues are known and/or can be resolved

Examining Election Workers' paperwork also helps identify where more training may be needed





## Deploy the Open and Close the Polls Checklists

- Remember to customize it for your entity's procedures

## Create a Daily Checklist of tasks to perform

## Create instructions for closing the polling place

- Filing paperwork
- What must to be delivered
- What must be sealed/locked



Express the importance  
of Chain of Custody

- Transparency
- Security
- Not to leave equipment unattended

Hands on training

- Voting equipment
- Completing paperwork
- Set up a mock polling place
- Opening & Closing process

Role Play

- Common voter scenarios for early voting
- Common voter scenarios for election day
- Curbside Voting scenarios
- Voter etiquette
- De-escalation Tactics

Explain

- The differences in procedures for Early Voting and Election Day.
- New procedures
- New legislation that affects laws and processes
- Responsibility



# Verbal De-Escalation Tactics



# “That Person”



## Hot topics

- Voter ID
- Firearms
- Cellular devices
- Voting machines



“State Law  
Requires/  
prohibits...”

**Avoid the Rabbit Hole**



# Take a deep breath





# Defy Expectations

- Don't take it personally
- Keep it logical
- Stay focused
- Don't "take the bait"



# Listening Skills

- Active listening
- Acknowledgement
- Ask Questions
- Non-verbal cues
- One-on-one



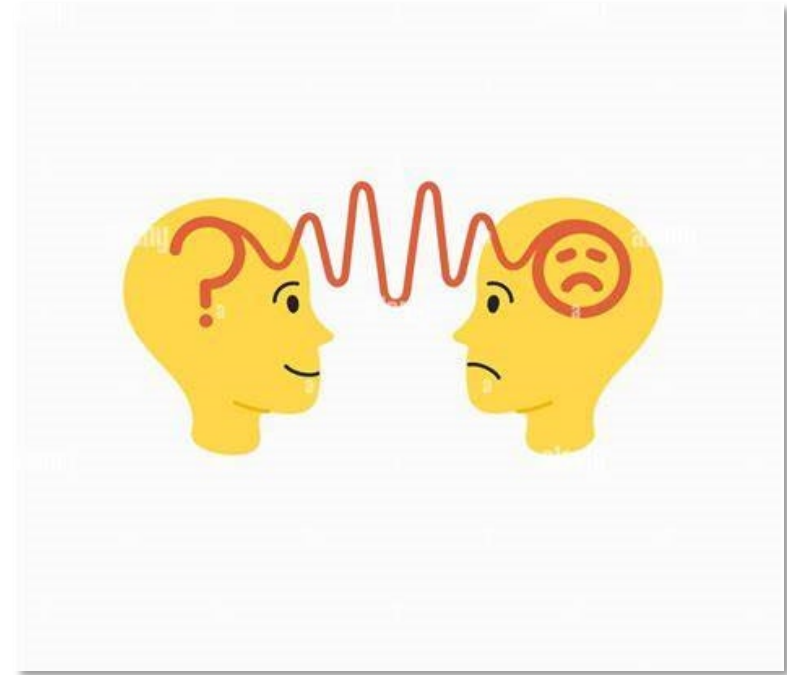
# Slow down

- Utilize silence
- Pause between sentences
- Think before speaking
- REMINDER: Deep breaths



# Understand The Situation

- Empathize
- Apologize
- Etiquette
- Be Forgiving
- Benefit of the doubt



## Find A Solution

- Follow through with a resolution
- Ask for help
- Explain options
- Have resources available
- Give consistent answers
- Be thorough
- “Less Red Tape, More Red Carpet”



# Have a Back Up Plan

- Gather information
- State Law: “A person who is arrested at a polling place while voting or waiting to vote shall be permitted to vote, if entitled to do so, before being removed from the polling place” [Sec 32.075(d)]
- Weigh the options
- SOS Complaint Information Posting should be posted at all polling locations
- Emergency Contacts
- Call the election office to report the incident
- Provide Documentation – incident reports, if directed by the election office





# The Aftermath

- Step Aside
- Check on your poll workers
- Don't Stew, move on
- Tell workers how they will be supported



## H.E.A.T.

- H – Hear them out
- E – Empathize
- A – Apologize
- T – Take Action



# SOS Complaints Department

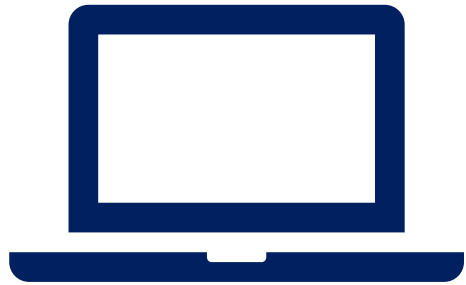
You may report **any** complaint about the conduct of this election, including **voting rights violations** and **complaints** about local election officials administering the election, to:

<b>Any Election Texas Secretary of State's Office</b>			
<b>By Calling:</b>  (800) 252-8683 (512) 463-5650	<b>By Writing:</b>  Office of the Secretary of State P.O. Box 12060 Austin, Texas 78711	<b>By Emailing:</b>  elections@sos.texas.gov	<b>By Faxing:</b>  (512) 475-2811

- If you contact the Secretary of State in writing either by mail, fax or email, include your contact information in case additional information is needed.



# Available Support



**WEBINARS**



**TRAINING**



**RESOURCES**

ELECTIONS DIVISION  
[elections@sos.texas.gov](mailto:elections@sos.texas.gov)  
800-252-8683  
ELECTION SECURITY TRAINERS  
[electionsecurity@sos.texas.gov](mailto:electionsecurity@sos.texas.gov)

