JOB AID: MAIL BALLOT BAG STATION

SDVOTE
COUNTY OF SAN DIEGO
REGISTRAR OF VOTERS
MAIL IT. DROP IT. VISIT.

VOTER	POLL WORKER	EXAMPLE
DROP OFF OWN VOTED MAIL BALLOT IN ENVELOPE The voter is dropping off their completed mail ballot sealed inside its return envelope.	1) Verify that the envelope is signed by the voter, dated, and sealed.	
DROP OFF SOMEONE ELSE'S VOTED MAIL BALLOT IN ENVELOPE A person is dropping off another voter's completed mail ballot sealed inside its return envelope	1) Verify that the "Person Authorized to Return" box is completed and signed by person dropping off envelope. AND 2) Verify that the envelope is signed by the voter, dated, and sealed.	
DROP OFF VOTED MAIL BALLOT BUT NEED REPLACEMENT ENVELOPE The voter requests a Replacement Envelope for their voted mail ballot	1) Provide a Replacement Envelope. AND 2) Verify that the envelope is signed by the voter, dated, and sealed. AND 3) Ensure that the voter completes the name, address, and date of birth fields.	

JOB AID: MAIL BALLOT BAG STATION

IF	THEN
The voter wants to vote in person	• Direct the voter to Greeter Station • Remember, it is always the voters choice whether to drop-off their mailed ballot or vote it in person
The voter insists on casting their mailed ballot without its envelope into the Ballot Box	• Direct the voter to the Greeter Station to begin check-in process
The voter brings multiple envelopes	• Verify that each envelope is signed by voter, dated, and sealed. • Verify that each "Person Authorized to Return" box is filled out and signed
A person wants to drop off another's mailed ballot in envelope but declines to fill out "Person Authorized to Return" section	• Ensure that the envelope is signed by the voter, dated, and sealed • Accept the envelope
The voter wants to drop off their completed mailed ballot but does not have their return envelope	• Provide the voter with a Replacement Envelope • Ensure the voter writes in their name, address, and date of birth in the proper fields • Ensure envelope is signed, dated, and sealed
The voter brings an RAVBM ballot (Remote Accessible Vote by Mail)	• Verify that the RAVBM Envelope is complete, signed and sealed • Provide Replacement Envelope if needed
The voter brings a completed ballot sealed inside its return envelope from another county in California	• Accept the sealed envelope • Place the envelope in the Mail Ballot Bag • Inform voter that it will be sent to the proper county
The voter brings a ballot from another state	• Inform the voter that out-of-state ballots cannot be accepted
The voter brings completed Mail Ballot Signature Form	• Ensure that the form is completed • Place in Mail Ballot Signature Form Envelope
An Observer or Poll Watcher arrives at the Vote Center	• Direct the person to the Greeter Station to fill out the Observer Sign-In Sheet (not required to sign)
If there are more than 10 voters waiting to be helped by the Greeter Station	• Notify the Site Manager
You do not know how to assist a voter or visitor	• Consult the Poll Worker Manual • Consult with your Site Manager who may decide to call the Poll Worker Hotline.

JOB AID: GREETER STATION

POLL WORKER

- Greet and welcome the voters and visitors with a smile

- Hand the voter a Check-In Form on a clipboard with a pen

  - Available in the five federally mandated languages

    - English, Chinese, Spanish, Filipino, and Vietnamese

- Ask the voter to fill out Part 1 of the Check-In Form neatly and completely, and sign where indicated at the bottom of the page

- Direct the voters to an available poll worker at the Check-In Station

IF	THEN
A voter is dropping off a completed mailed ballot sealed inside its return envelope	• Direct voter to the Mail Ballot Bag Station
A voter brings in their ballot received in the mail and wants it cast into the ballot box without its envelope	• Request the voter fill out a Check-In Form • Direct voter to an available Check-In Station • Do NOT provide voter a Secrecy Sleeve at Greeter Station
A voter line is forming at the Check-In Station	• Notify your Site Manager • Wait until the line subsides before handing out additional Check-In forms
A voter requests an Emergency Ballot	• Notify your Site Manager • Instruct voter to fill out a Check-In Form • Direct voter to an available Check-In Station
A voter is dropping off an Emergency Ballot	• Notify your Site Manager • Instruct voter to fill out a Check-In Form • Direct voter to an available Check-In Station
An Observer, Poll Watcher, or member of the media enters the Vote Center	• Welcome and request that they sign in on the Observer sign-in sheet (not required to sign) • Notify your Site Manager
You are not sure how to answer a voter's question or uncertain how to assist a voter or visitor	• Notify your Site Manager, who will call the Poll Worker Hotline if necessary

JOB AID: CHECK-IN STATION

Greet and Welcome each voter with a smile

- Ask the voter for their Check-In Form

Search for Voter in EPB:

- Select MANUAL VOTER SEARCH

Find Voter

- On the FIND VOTER screen, begin with the NAME AND BIRTH DATE search
- Enter the voter's information from Check-In form; enter the first four letters of their last and first name, and complete date of birth

If the voter is not found:

- Verify that their first and last name and date of birth from the Check-In form were correctly entered into the EPB.
- Verify with the voter the spelling of their name and address or if voter has hyphenated name, Jr/Sr, etc.
- If the voter is still not found, perform at least two different searches; search again using another of the four available search options on the Find Voter screen (e.g., Last Name and House Number, Address Search, Voter ID)

If the voter is found:

- If only one voter matches the search, confirm that the information on the Voter Identification screen is the same as on the Check-In form
- If more than one voter matches the search, on the Search Results screen, select the correct voter

VBM Ballot Issued

- VBM Ballot Issued: On the VBM Ballot Issued screen, select if the voter is voting their mailed ballot in person

Voter Eligibility

- On the Voter Eligibility screen, read and follow, the instructions in the blue message box; on the Check-In form mark the correct bubble and write the Voter's ID and sequence # and party; write Sequence # and party on the voter's BMD Ticket
- For CVR or Prov. Voters, mark appropriate box, write the seq. #, party, and vote center number. Have Voter complete Section 2.
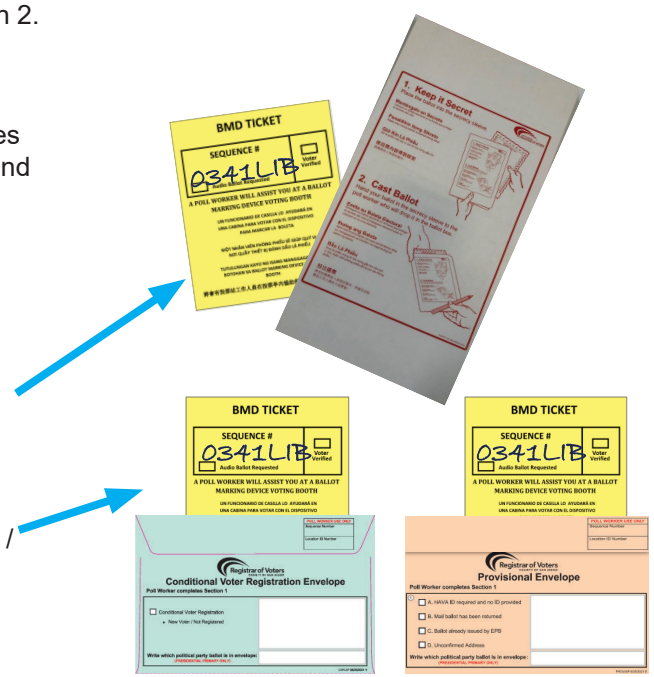
Voter Signature

- On the Signature screen, complete verificationprocessand ask the voter to verify Sequence # and party on the EPB matches the Sequence # and party on the Check-In Form, BMD Ticket, and envelope if applicable; check VerifiedboxonCheck-Inform
- Ask voter to please read the message and sign

Issue Ballot

- On the ISSUE BALLOT screen, select BMD or Non-BMD

Processing Complete

- At Processing Complete screen, provide voter:
  - A BMD Ticket and a Secrecy Sleeve, or
  - For CVR or Provisional Voters, provide green CVR or peach Provisional envelope, BMD Ticked and a PROV / CVR Status Card.
  - Direct voter to Voting Station

IF	THEN
The voter's address on Check-In Form does not match EPB	Ask the voter if they have moved • If yes, Request Voter complete part 2 of the Check-In Form • Process as SB207 Voter • Update Residence Address in EPB
The voter is voting for the first time in San Diego County	Process the voter as a CVR • Request Voter fully complete Section 2 of CVR Envelope • Mark CVR box; write Seq. and Location #s on Poll Worker side • Hand the voter envelope, BMD Ticket, and Prov/CVR Status Card
The EPB displays "Voter is not eligible to vote a regular ballot" Due to: 1. VBM Ballot already returned, or 2. Ballot already issued by EPB	Process as a Provisional Voter • Request that the voter complete Section 2 of Provisional Envelope • Mark correct box; write Seq. and Location #s on Poll Worker side • Hand voter envelope, BMD ticket, and Prov/CVR Status Card
The voter is not eligible to vote a regular ballot due to an Unconfirmed Address	• Notify the Site Manager
The voter wants to update their party preference	Request voter to fill out "Part 3-Party Change" section of Check-In Form • Process as SB207 Voter • Update Party selection in EPB
The EPB displays "Voter is eligible to vote," but it does not provide instructions in blue message box	Process as a VBM Ballot Issued Voter voting on BMD • Check the 'N/C' bubble on the Check-In Form • Write Seq. # and party on the Check-In Form • Write Seq. # and party on BMD Ticket • Have voter sign and verify Seq. # and party on EPB matches the BMD Ticket and Check-In Form. If yes, mark 'Verified'box onCheck-InForm • Select 'BMD' at 'Issue Ballot' screen • Hand voter BMD Ticket and Secrecy Sleeve • Direct voter to Voting Station
The voter is surrendering the ballot they received in the mail	• Have a conversation with the voter explaining the surrender process and that they will use the BMD to mark their selections • Write "Surrendered" on the mailed ballot and/or envelope with the mailed ballot inside, and tear in half • Place in Brown Box
EPB shows voter's party as "NP"	• Have voter complete "Crossover Ballot Options" (Part 1 of Check-In Form)
Voter demands an Emergency Ballot	• Notify the Site Manager
The voter requests reference ballot in language other than English	• Direct voter to the Facsimile/Reference Ballot binders located on the Voter Access table; retrieve the binder when voter completed
The voter's information, other than address, is incorrect in EPB	• Notify Site Manager, who will call Poll Worker Hotline for instructions
EPB displays "De-certified"	• Notify Site Manager, who will call Poll Worker Hotline for instructions
Voter hands you a **Wait Time Ticket**	• Select ENTER WAIT TIME from EPB's Launchpad Menu; Enter time written on voter's ticket
You do not know how to answer a question or assist a voter or visitor	• Notify Site Manager, who will call the Poll Worker hotline if necessary

JOB AID: VOTING STATION

VOTER	POLL WORKER	EXAMPLE
Voting in-person, Ballot Marking Device ("BMD")	• Insert the Poll Worker Card • Enter Seq. #/party from voter's BMD Ticket to "Activate" ballot • Check "Voter Verified" box on BMD Ticket after voter confirms seq. #/party match BMD Ticket • Remove and secure PW Card • Request that the voter read instructions in voting booth • Instruct voter to pause and wait for ballot to finish printing before removing ballot from printer tray • Remind the voter to place their printed ballot into secrecy sleeve or Prov/CVR envelope	
Requests Accessible Voting Session	• Provide the voter with the ATI and headphones (all other accessibility devices will be brought by voter) • Offer the voter a chair if available • Select "Enable AVS Controller" prior to activating the ballot • Assist the voter as requested	
Voting in-person: 1) ballot received in the mail without its envelope, or 2) an Emergency Ballot	• Ensure voter has checked in (voter must have a secrecy sleeve) and direct to an available cardboard or ADA voting booth and request they read instructions • Request voter place their voted ballot into the secrecy sleeve and take to the Checkout Station	

JOB AID: VOTING STATION

IF	THEN
BMD Voter requires settings assistance	Select from the following options at the top of the BMD screen: • *Language*: choose English, Chinese, Spanish, Filipino, or Vietnamese • *Text Size*: increase or decrease the font size of displayed text • *Audio*: adjust reading speed and headphone volume (in AVS controller mode only) • *View*: adjust screen contrast and background color
Voter requests navigation assistance	• Direct voter to touch the "More" button at the bottom to scroll down • Select "Next" in the lower right to proceed to next contest • Select "Previous" in the lower left to return to previous contest • Select a contest tab at the top to go directly to that contest
Voter requests assistance marking their ballot using BMD	• Assist voter per their request. Do not ask voter to state oath or sign form. • To select a candidate: tap the gray square to the left of candidate's name • To vote for or against a measure: tap gray square to the left of "Yes" or "No" • To review all current selections: tap "Review" at any time • To modify selections: tap "back to ballot" from the "Review" screen • To change a selection: tap the marked gray square to deselect and then tap new selection
Voter requests assistance printing their ballot	• Direct voter to tap on "Print Ballot" after reviewing all selections • An advisory message appears if voter did not to vote every contest (voter has option to select which contests they choose to vote) • The final screen informs voter: "Your official ballot has printed. Cast your paper ballot into the ballot box; this is not a receipt"
Mistake was made entering sequence number causing wrong ballot to be pulled up	Activation needs to be canceled: • Tap "More" in the top right-hand corner of the touchscreen • Tap "Cancel Activation," then tap "Yes, cancel activation" • Initiate a new session using same sequence number
Voter printed out their ballot and notices a mistake and requests to mark a new ballot	• Write "Spoiled" across the ballot • Tear the QR/barcode on spoiled ballot slightly • Initiate a new session using same sequence number found at top right of BMD ballot • Place spoiled ballot in the Brown Box • Notify Site Manager that the voter may require additional assistance
You have a question on how to assist a voter or visitor	• Notify the Site Manager who will call the Poll Worker Hotline if necessary

JOB AID: CHECKOUT STATION

VOTER	POLL WORKER	EXAMPLE
Approaches the Station with ballot and secrecy sleeve	1. Ask the voter to hand you their secrecy sleeve. Grip the ballot to confirm only a single sheet of paper is being cast from the secrecy sleeve; slide the ballot into the Ballot Box. Always take care not to view or reveal the voter's selections. 2. Verify the secrecy sleeve is empty 3. Provide an "I Voted" Sticker Thank voter for voting!	
Approaches Station with green CVR or peach Provisional envelope	1. Verify both sides of the envelope are completed 2. Verify the envelope is sealed 3. Deposit the envelope into Ballot Box 4. Provide an "I Voted" Sticker Thank voter for voting!	
Approaches Station with their completed mail ballot sealed inside its return envelope	1. Inform the voter that Mailed Ballot envelopes can be deposited into the Mail Ballot Bag and direct them to that Station 2. If the voter insists on depositing a Mailed Ballot Envelope into the Ballot Box, verify the envelope is sealed, signed by the voter, and dated; deposit envelope into Ballot Box	

JOB AID: CHECKOUT STATION

IF	THEN
The voter presents a ballot without a secrecy sleeve or an envelope	• Ask the voter to return to Vote Station and retrieve their secrecy sleeve or envelope before casting ballot into the Ballot Box • If the voter returns with an envelope, ensure ballot is placed inside envelope, the envelope is filled out, signed, and sealed
You have any concern whether a person voting their mailed ballot without an envelope was properly checked in	• Confirm that the voter filled out a Check-In Form and they were processed at the Check-In Station; notify the site manager with any questions or concerns
A voter presents either: 1) a ballot received in the mail without its return security envelope or secrecy sleeve, or 2) an Emergency Ballot without a secrecy sleeve. The voter states they left the Vote Center after checking in and have returned to vote it	• Inform the voter they will need to complete the Check-In process and direct them toward the Greeter Station; notify the Site Manager
The voter requests to insert their ballot into the Ballot Box	• Inform the voter that you will insert their ballot into the Ballot Box while protecting the privacy of their ballot and they can watch the entire process • If they still insist, ask you Site Manager for assistance.
The voter asks how ballots are tracked to ensure they are received by the ROV	• Inform voter that every ballot in the Ballot Box is securely transported to the ROV
The voter asks how the status of their Provisional/CVR ballot can be tracked with the ROV	• Ensure the voter has been provided a Prov/CVR Status Card; inform voter to call phone number listed on the Status Card 30 days after the election for information on the status of their ballot
You have questions on how to assist a voter or visitor	• Notify the Site Manager who will call the Poll Worker Hotline if necessary
A voter or fellow poll worker requests your assistance in another area of the Vote Center	• **Never leave the Ballot Box unattended**; notify the Site Manager and request their assistance
An observer or member of the public states that you need to change a Checkout Station procedure	• Continue to perform your duties per ROV training; immediately inform the Site Manager

JOB AID: CLOSING

Included on this Job Aid:

- Packing Reference Chart (FRONT) - A quick reference on where items will be packed during the closing procedures each night of the election
- Signed and Sealed Reference Guide (BACK) - A quick rundown of individual closing-related items used at the Vote Center, includes information on if an item requires a signature OR if the item is sealed (and how it is sealed)
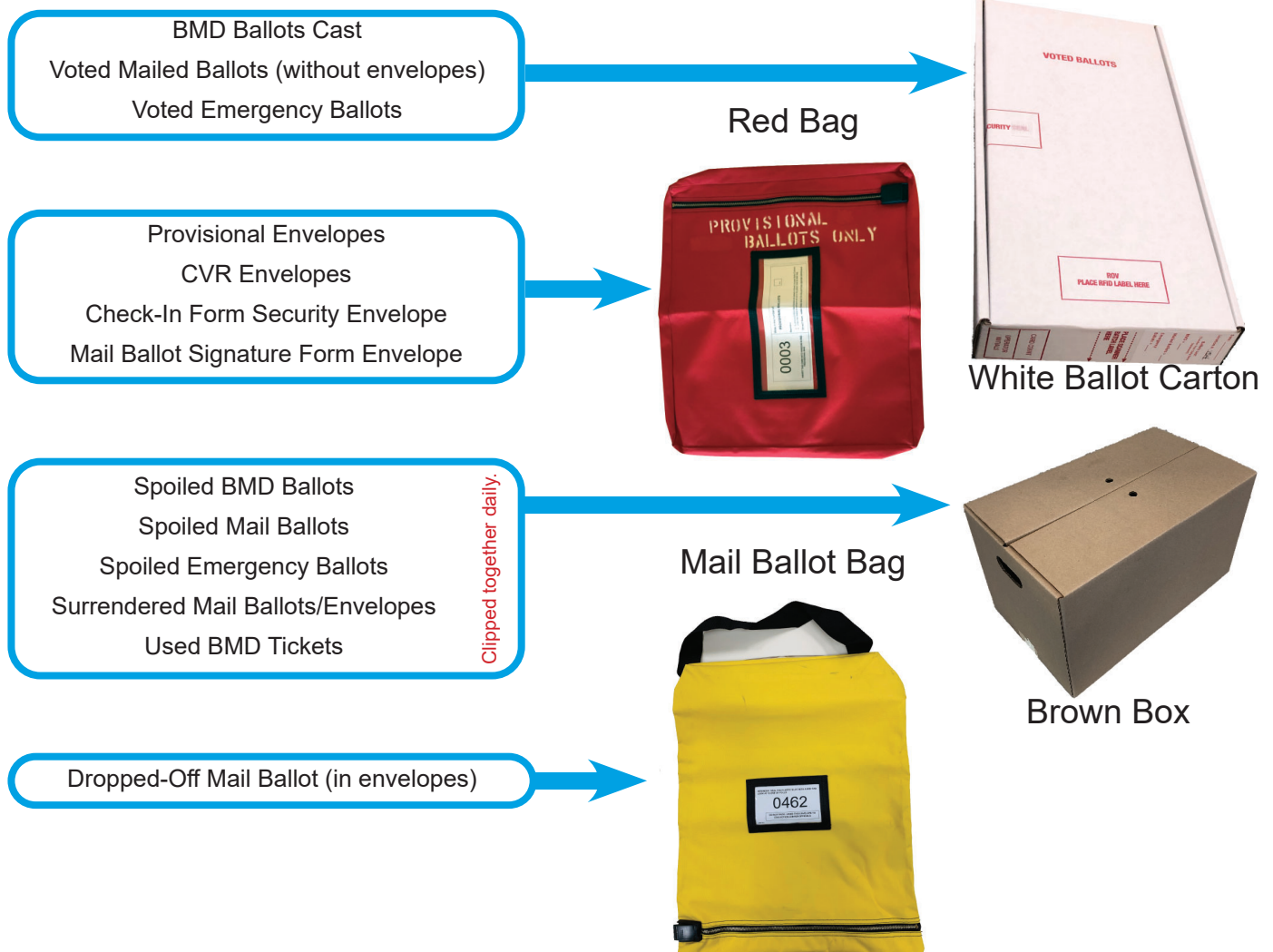
Other resources include:

- The Daily Closing Checklist (found in the Poll Worker Manual on pages 87 & 88)
- The Closing Procedures page in the Manual (pages 48)

Closing Procedures - Packing Reference Chart

Items to be Packed and Sealed   **Where Items Get Packed and Sealed**

BMD Ballots Cast
Voted Mailed Ballots (without envelopes)
Voted Emergency Ballots

→ Red Bag

Provisional Envelopes
CVR Envelopes
Check-In Form Security Envelope
Mail Ballot Signature Form Envelope

→ White Ballot Carton

Spoiled BMD Ballots
Spoiled Mail Ballots
Spoiled Emergency Ballots
Surrendered Mail Ballots/Envelopes
Used BMD Tickets

Clipped together daily.

→ Mail Ballot Bag

Brown Box

Dropped-Off Mail Ballot (in envelopes) →

Signed and Sealed Reference Guide

	Item	Signed?	Sealed?	Where?
Vote center Items	Brown Box	YES - poll workers sign the Closing Blue Security Seal.	YES - Closing Blue Security Seal "Surrendered" box checked.	Remains at the vote center for ROV pickup after the election.
	Official Ballot Pouch	NO	NO	Remains at the vote center for ROV pick up after the election.
	Blue Envelope	NO	NO	Remains at vote center until Election Night; on Election Night it is returned to DART.
	BMD Seal Verification Log	YES - only done on set up day of the Vote center.	NO	Remains in the Blue Envelope (Tab 6).
	Daily Ballot Statement	YES - on Election Night only; all poll workers sign.	NO	Returned to the Blue Envelope (Tab 6); on Election Night it is placed in the White Ballot Carton.
DART Items	Chain of Custody Form	YES - two designated poll workers.	NO	Handed directly to DART official. One poll worker retains the white copy.
	White Ballot Carton(s)	YES - seal and then all poll workers sign the Closing Blue Security Seal.	YES - Closing Blue Security Seal with "Voted Ballots" box checked.	Handed directly to DART official (even if empty).
	Red Bag	NO - white card must be filled out completely.	YES - Secure with red tab lock.	Handed directly to DART (even if empty).
	Check-In Form Security Envelope	NO - vote center number and date must be filled out after forms are placed inside.	YES - Envelope gets sealed.	Envelope is placed in the Red Bag every night (even if empty).
	Mail Ballot Signature Form Envelope	NO	YES - If there are Mail Ballot Signature Forms, the envelope gets sealed.	If there are Mail Ballot Signature Forms, the envelope is placed in the Red Bag.
	Mail Ballot Bag	NO	YES - Secured with red tab lock on zipper before use; red tab lock on slot after polls close.	Handed directly to DART official (even if empty).

JOB AID: EMERGENCY PREPAREDNESS

SITE MANAGER

- React: Determine the urgency of the situation

- If there is or you perceive a threat to voter or poll worker safety. - If there is a disruption to the voting process.	**CALL 9-1-1**	- Provide Vote Center facility name and street address - Details of threat or disruptive conduct - Call Poll Worker Hotline to inform when safe to do so
If Site Manager is unable to resolve situation where voters/poll workers are uncomfortable but do not feel threatened	Call Poll Worker Hotline	- Poll Worker Hotline will provide guidelines on how to de-escalate the situation or will call local law enforcement if necessary - Follow Poll Worker Hotline instructions

IN CASE OF EMERGENCY/DISASTER EVENT:
- **Immediately call 9-1-1 and follow these steps:**

Step 1	Evacuate in case of disaster or event (fire, bomb threat, etc.)	- Calmly direct voters to emergency exits - Instruct poll workers to meet at predesignated assembly area selected ahead of time

Step 2	Secure election materials (if it can be done safely)	- As poll workers evacuate, direct them to take:
		  - Ballot Box
		  - Mail Ballot Bag(s)
		  - Completed Check-In Forms

Step 3	Meet at designated assembly area	- Account for all poll workers - Account for and secure election materials
Step 4	Call Poll Worker Hotline as soon as safely possible	- Report status: identify yourself, poll worker conditions, needs, and receive direction/next steps.

JOB AID: De-escalation Tactics

Listen	• Listen with empathy even if you do not agree with them. • Present genuine concern and a willingness to understand without judging. • Give your full attention, nod and ask questions, and avoid changing the subject or interrupting. • When other people think that you have not listened to their concerns, they will think that you do not care and will not help them.
Acknowledge and Respond	• Acknowledge and express an understanding of the voter's concerns without passing judgment on them. • Respond in a calm voice with normal volume. • Respond with kindness and respect. Use "I" statements, as in , "I hear you saying..." and "I understand that..."
Use Positive Words	• Remain respectful and courteous. • Address the individual with civility and use phrases such as "please" and "thank you." • Shifting conversation to the fact that they will be able to vote by saying, "You are going to vote today," or "we will assist you with voting by bringing the Ballot Marking Device to you as soon as possible."
Control Your Tone and Body Language	• Be aware of your non-verbal communications; a significant portion of the message people receive from you in face-to-face communication is conveyed through your body language and your voice tone. • Ensure your body language, tone, facial expressions, and gestures purposefully relay an attitude that is calm, composed and empathetic. • Maintain a safe distance and avoid pointing, excessive gesturing, or touching the other person. • Maintain a neutral and attentive facial expression. Otherwise, you could be perceived as being frustrated and uninterested in assisting.
Offer Solutions	• If you are incapable of catering to someone's first choice, deflect responsibility to ROV policies. • If possible, offer multiple options that follow ROV guidelines to choose from as an alternative, instead of just one. • In particular challenging situations, it may be best to change the setting by removing people from the are. This could include parties involved in the conflict or any onlookers. • In every case, the hotline is always there to assist you.