

JOB AID: CHECK-IN STATION

Find Voter

- Greet and welcome each voter with a smile, ask them for their Check-In Form, then Select Manual Voter Search
- 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 the information on the 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

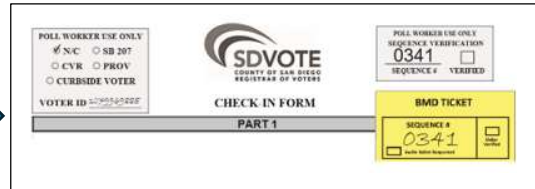
- On the VBM Ballot Issued screen, ask the voter: "Did you bring the ballot you received in the mail?" Wait for the response, if the answer is Yes, then ask: "Are you voting your mail ballot in person?"
- Select appropriate response based on if the voter is voting their carry-in Vote By Mail ballot in person or BMD

Carry-In VBM Ballot Surrender

- If voter is surrendering their carry-in VBM Ballot: "In order to vote a BMD ballot in person today, since each voter only gets one complete ballot, we need to surrender your carry-in Vote By Mail Ballot. I will do this by writing SURRENDERED and tearing it in half. That will invalidate your carry-in Vote By Mail Ballot and envelope so that we can issue you a new ballot here."
- Voter can take a picture or write down their selections on another paper before surrendering

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 # on the voter's BMD Ticket
- For CVR or Provisional Voters, mark appropriate box, write the Sequence # and Vote Center # before having voter complete Section 2 of the envelope



Voter Signature

- On the Signature Screen before the voter signs, complete verification process by asking the voter to verify the Sequence # from the EPB and Check-In Form are matching (BMD Ticket, carry-in VBM Ballot, and/or Prov/CVR envelope too whichever is applicable)
- Check the verified box, ask the voter to please read the message
- and sign, then press Done

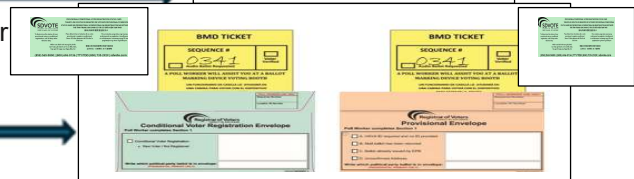


Issue Ballot

- On the Issue Ballot screen, select BMD or Non-BMD


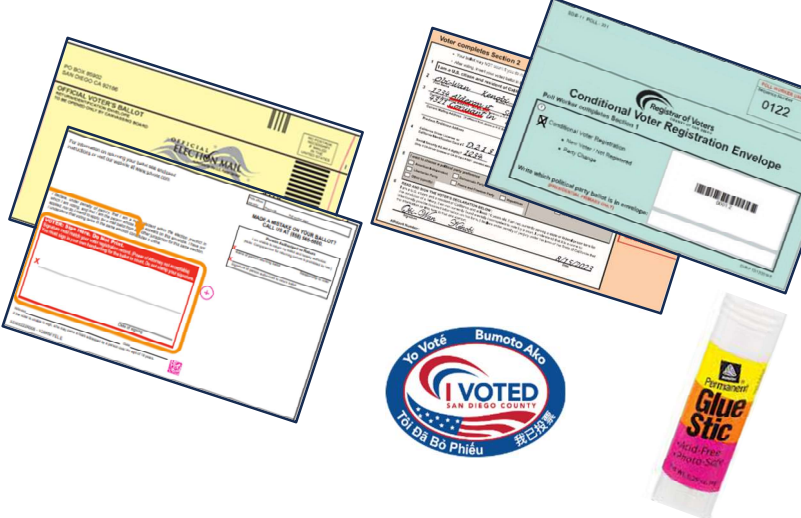
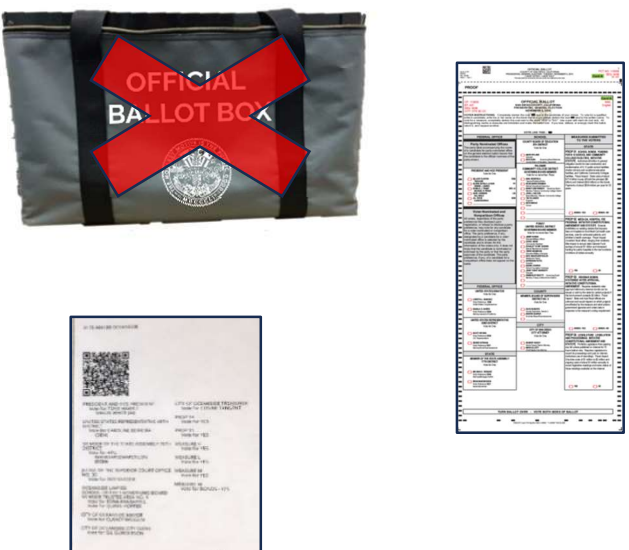
Processing Complete

- At Processing Complete screen, provide voter with:
 - A BMD Ticket and a BMD Secrecy Sleeve, or
 - Long-Form Secrecy Sleeve for Carry-In VBM Ballot, or
 - For CVR or Provisional Voters, provide green CVR or peach Provisional envelope, BMD Ticket, 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 <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • Request Voter fully complete Section 2 of CVR Envelope • Mark CVR box; write Seq. # and Location # on Poll Worker side of envelope • 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 <ul style="list-style-type: none"> • Request that the voter complete Section 2 of Provisional Envelope • Mark correct box; write Seq. and Location #s on Poll Worker side of envelope • 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	<ul style="list-style-type: none"> • Notify Site Manager, who will call Poll Worker Hotline for instructions
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 <ul style="list-style-type: none"> • Check the 'N/C' bubble on the Check-In Form • Write Seq. # on the Check-In Form and on the BMD ticket • Ask voter to sign and verify Seq. # on EPB matches BMD Ticket and Check-In Form. If so, mark 'Verified' box on Check-In Form • 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	<ul style="list-style-type: none"> • Have a conversation with the voter explaining they will use the BMD to make their selections • Write "Surrendered" on the mail ballot and/or envelope with the mail ballot inside, and tear in half • Place in Brown Box
The voter demands an Emergency Ballot	<ul style="list-style-type: none"> • Notify Site Manager, who will call Poll Worker Hotline for instructions
The voter requests reference ballot in language other than English	<ul style="list-style-type: none"> • Direct voter to the Facsimile/Reference Ballot binders located on the Voter Access table; retrieve the binder when voter is checked out
The voter's information, other than address, is incorrect in EPB	<ul style="list-style-type: none"> • Notify Site Manager, who will call Poll Worker Hotline for instructions
The EPB displays HAVA ID	<ul style="list-style-type: none"> • Notify Site Manager, who will call Poll Worker Hotline for instructions
EPB displays "De-certified" or you're stuck for any other reason not listed on job aid	<ul style="list-style-type: none"> • Notify Site Manager, who will call Poll Worker Hotline for instructions
Voter hands you a Wait Time Ticket	<ul style="list-style-type: none"> • Select Enter Wait Time from EPB Launchpad Menu in the upper right hand corner of the home screen, then enter the time written on the voter's ticket

CHECK OUT STATION JOB AID

VOTER	POLL WORKER
<p>Ballot in secrecy sleeve</p>	<ul style="list-style-type: none"> Slide ballot from secrecy sleeve into Ballot Box without looking at the ballot Verify secrecy sleeve is empty Provide "I Voted" Sticker 
<p>Ballot in Envelope - Mail CVR, Provisional</p>	<p>Verify all envelopes are:</p> <ul style="list-style-type: none"> Filled out (both sides if needed) Signed by voter and dated and sealed Deposit into Ballot Box Provide "I Voted" Sticker 
<p>Ballot - no Secrecy Sleeve or Envelope</p>	<ul style="list-style-type: none"> DO NOT deposit any ballots in ballot box that are presented without Secrecy Sleeve or Envelope Ask voter to retrieve secrecy sleeve or envelope from Voting Station If Voter indicates never received secrecy sleeve or envelope, alert Site Manager 

IF	THEN
Official Ballot or Emergency Ballot without its security envelope or secrecy sleeve	<ul style="list-style-type: none"> • Direct voter to Greeter Station to complete the check-in process • Notify Site Manager
Voter requests to insert their ballot into Ballot Box	<ul style="list-style-type: none"> • Inform voter you will insert ballot into the Ballot Box, protecting privacy of their ballot, and they can watch the entire process
Voter asks how ballots are tracked to ensure they are received by ROV	<ul style="list-style-type: none"> • Inform voter that every ballot in the Ballot Box is securely transported to the ROV and will be counted
Voter asks how the status of their Provisional/CVR ballot can be tracked	<ul style="list-style-type: none"> • Inform voter to call phone number listed on the CVR/Provisional Status Card 30 days after election for information on the status of their ballot
Uncertain how to assist a voter or visitor	<ul style="list-style-type: none"> • Notify Site Manager
A voter or fellow poll worker requests your assistance in another area of the Vote Center	<ul style="list-style-type: none"> • Never leave Ballot Box unattended • Notify Site Manager
Observer or member of the public states you need to change a Checkout Station procedure	<ul style="list-style-type: none"> • 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



	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 Accordion 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 ;Ĝ ĜŶ šĪ ĜŵĐŁJ
	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).

Signed and Sealed Reference Guide

JOB AID: EMERGENCY PREPAREDNESS



SITE MANAGER

- React: Determine the urgency of the situation

<ul style="list-style-type: none"> • If there is or you perceive a threat to voter or poll worker safety. • If there is a disruption to the voting process. 	<p>CALL 9-1-1</p>	<ul style="list-style-type: none"> • Provide Vote Center facility name and street address and location within the facility • Details of threat or disruptive conduct • Call Poll Worker Hotline to inform when safe to do so
<p>If Site Manager is unable to resolve situation where voters/poll workers are uncomfortable but do not feel threatened</p>	<p>Call Poll Worker Hotline</p>	<ul style="list-style-type: none"> • 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, gas leak, water leak, etc.)	<ul style="list-style-type: none"> • 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)	<ul style="list-style-type: none"> • As poll workers evacuate, direct them to take: <ul style="list-style-type: none"> • Ballot Box • Mail Ballot Bag(s) • Completed Check-In Forms
Step 3	Meet at designated assembly area	<ul style="list-style-type: none"> • Account for all poll workers • Account for and secure election materials
Step 4	Call Poll Worker Hotline as soon as safely possible	<ul style="list-style-type: none"> • Report status: identify yourself, poll worker conditions, directions you were given by facility or by emergency personnel, needs, and receive direction/next steps

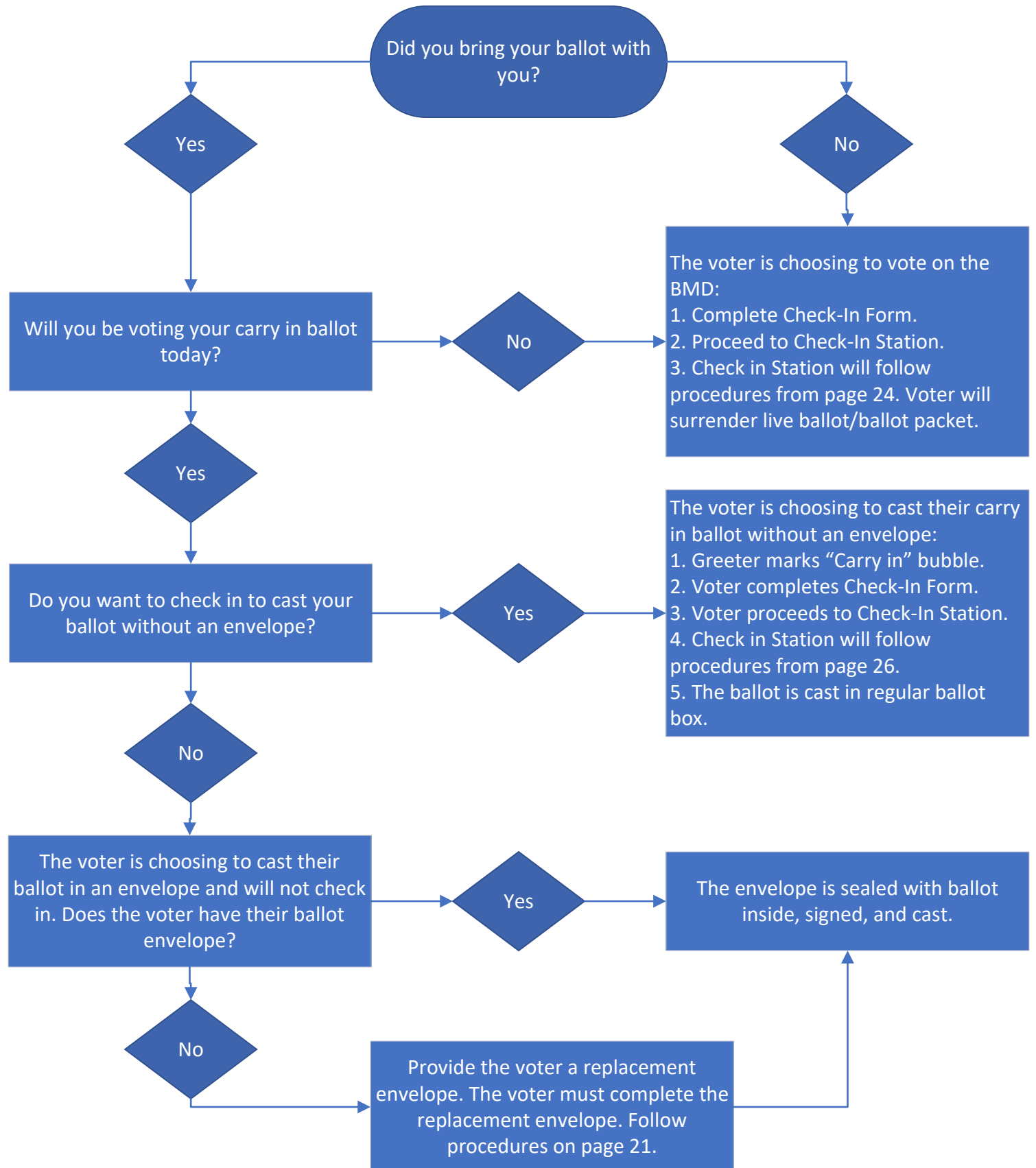
JOB AID: De-escalation Tactics



<p>Wait</p>	<ul style="list-style-type: none"> • To process (understand) the question. • Suppress your instincts to respond quickly as this may cut off a statement or a question. • Wait first to process the question, then formulate a reasoned response.
<p>Recognize</p>	<ul style="list-style-type: none"> • Focus on how to recognize other people’s feeling, anticipate needs and be sensitive, accommodating, and courteous in assisting them.
<p>Listen</p>	<ul style="list-style-type: none"> • To understand exactly what the voter is trying to communicate. • 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.
<p>Use Positive Words</p>	<ul style="list-style-type: none"> • Remain respectful and courteous. • Address the individual with civility and use phrases such as “please” and “thank you.” • Stay positive and don’t use language such as, “No you can’t do that.” • Start a conversation with what you can do for the voter, not with what you cannot do.
<p>Control Your Tone and Body Language</p>	<ul style="list-style-type: none"> • 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 facial expressions 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.
<p>Offer Solutions</p>	<ul style="list-style-type: none"> • 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 area. This could include parties involved in the conflict or any onlookers. • In every case, the Poll Worker Hotline is always there to assist you.



VOTER'S CHOICE FLOWCHART



Greeter Job Aid

The greeter is responsible for welcoming each voter to the vote center and assisting them with their voting options using the Voter's Choice Flowchart. The greeter's duties are below:

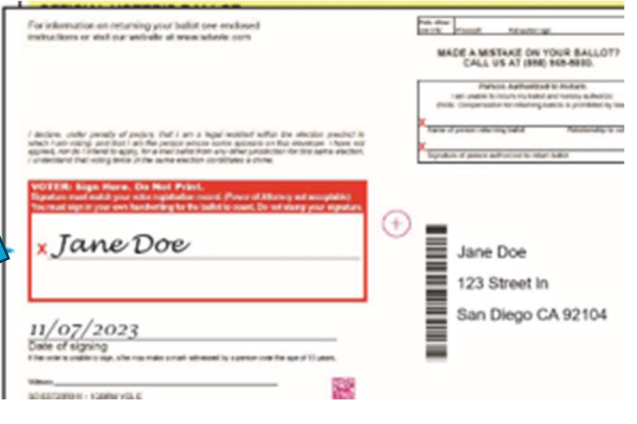
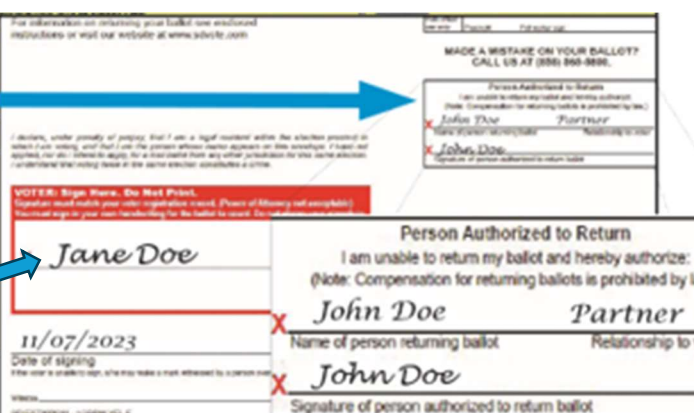
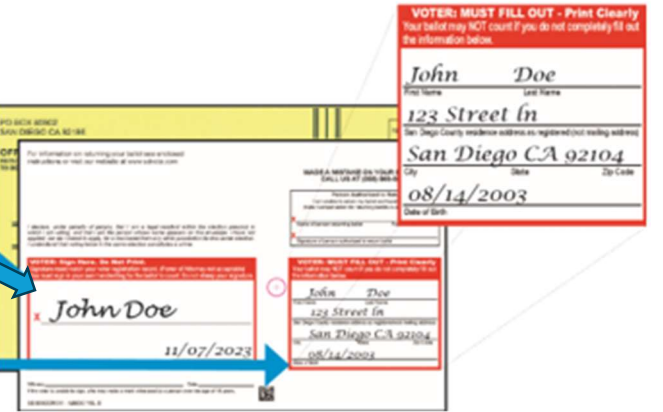
1. Greet the voter.
2. Ask the voter if they bought their ballot with them.
3. Allow the voter to choose how they would like to vote: carry in or BMD.
4. Mark "Carry in" bubble if the voter indicates.
5. Provide the voter their Check in Form.
6. Send the voter to the Check in Station for ePollbook Check In.

MAIL BALLOT STATION JOB STATION

Welcome every voter and ask, "Are you here to turn in your signed and dated mail ballot envelope?"

Yes: Great! I can take that for you. Here is your I voted sticker.

No: No problem. Please step inside and they will be happy to help you.

VOTER	POLL WORKER	EXAMPLE
<p><u>OWN BALLOT</u></p>	<p>Verify:</p> <ul style="list-style-type: none"> signed by voter dated sealed 	 <p>The example shows a mail ballot envelope with a voter signature 'Jane Doe' and a date '11/07/2023'. A blue arrow points to the signature area.</p>
<p><u>ANOTHER'S BALLOT</u></p>	<ol style="list-style-type: none"> Verify 'Person Authorized to Return' is completed and signed by person dropping off envelope Verify envelope is signed by voter, dated and sealed. 	 <p>The example shows a mail ballot envelope with a voter signature 'Jane Doe' and a date '11/07/2023'. A blue arrow points to the voter signature. Another blue arrow points to the 'Person Authorized to Return' section, which is signed by 'John Doe'.</p>
<p><u>REPLACEMENT ENVELOPE</u></p>	<ol style="list-style-type: none"> Verify Envelope is signed by the voter, dated and sealed. Ensure voter completes name, address, and date of birth fields. 	 <p>The example shows a replacement mail ballot envelope with a voter signature 'John Doe' and a date '11/07/2023'. A blue arrow points to the voter signature. Another blue arrow points to the printed information section, which includes the name 'John Doe', address '123 Street in San Diego CA 92104', and date of birth '08/14/2003'.</p>

MAIL BALLOT STATION JOB STATION

IF	THEN
The voter brings multiple envelopes	<ul style="list-style-type: none"> • Verify that each envelope is signed by voter, dated, and sealed. • Verify that each "Person Authorized to Return" box is filled out and signed
Declines to fill out "Person Authorized to Return" section	<ul style="list-style-type: none"> • Ensure that the envelope is signed by the voter, dated, and sealed. • Accept the envelope
Mail Ballot Replacement Envelope	<ul style="list-style-type: none"> • Ensure the voter writes in their name, address, and date of birth in the proper fields • Ensure envelope is signed, dated, and sealed
RAVBM ballot (Remote Accessible Vote by Mail)	<ul style="list-style-type: none"> • Verify that the RAVBM Envelope is complete, signed and sealed • Direct voter inside Vote Center if Replacement Envelope needed
Return envelope from another county in California	<ul style="list-style-type: none"> • Accept the sealed envelope • Place the envelope in the Mail Ballot Bag • Inform voter that it will be sent to the proper county
Ballot from another state	<ul style="list-style-type: none"> • Inform the voter that out-of-state ballots cannot be accepted
Mail Ballot Signature Form	<ul style="list-style-type: none"> • Ensure that the form is completed • Place in Mail Ballot Signature Form Envelope
You do not know how to assist a voter or visitor	<ul style="list-style-type: none"> • Consult the Poll Worker Manual • Consult with your Site Manager

JOB AID: VOTING STATION



IF	THEN
Voter cannot find a specific candidate	<ul style="list-style-type: none"> • If the contest has more candidates than can fit on one screen, they may have to hit the “More” button just once, wait for the screen to update, search that list of names, and repeat if necessary • If you also can not find the name, you may want to check the voter’s information pamphlet to confirm that the candidate should be listed for that contest • Candidate may be on the Qualified Write-in Candidates list found at the check-in tables • Ask your Site Manager for assistance, who may call the hotline for further information
Voter cannot find a specific contest	<ul style="list-style-type: none"> • Check the voter’s information pamphlet to confirm that the contest is available on their ballot • Ask your Site Manager for assistance, who may call the hotline for further information
BMD Voter requires settings assistance	<p>Select from the following options at the top of the BMD screen:</p> <ul style="list-style-type: none"> • <i>Language</i>: choose English, Chinese, Spanish, Filipino, or Vietnamese • <i>Text Size</i>: increase or decrease the font size of displayed text • <i>Audio</i>: adjust reading speed and headphone volume (in AVS controller mode only) • <i>View</i>: adjust screen contrast and background color
Voter requests navigation assistance	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Write the voter’s name on the Assisted Voter log (Blue Envelope tab 6) • To select a candidate: tap the gray square to the left of candidate’s name • To vote for or against a measure: tap the 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	<ul style="list-style-type: none"> • Direct voter to tap on “Print Ballot” after reviewing all selections • An advisory message appears if voter chooses not to vote every contest (voter has option to choose which contests 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”
Activated ballot needs to be canceled	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 aren’t sure how to assist a voter or visitor	<ul style="list-style-type: none"> • Notify the Site Manager who will call the Poll Worker Hotline if necessary

DETAILED INSTRUCTIONS FOR BALLOT ACTIVATION

Voter arrives with a BMD Ticket and a secrecy sleeve or envelope:

1. **Say to the voter**, “This is a ballot marking device, you will use it to mark your choices, review, and print your ballot. You will cast your ballot at another station. May I take your BMD ticket, please?”
2. Insert the PW Card.
3. At the Ballot Activation screen, enter the Sequence # from their BMD ticket, but do **not** touch “Activate” yet.
4. Place the BMD ticket next to the sequence number in the Ballot Activation box. **Say to the voter**, “We will use this BMD ticket to confirm the correct ballot is activated. Please verify that the number written here (point to BMD ticket) matches the number on the screen here (point to the Ballot Activation box).”
5. After the voter verifies they match, touch “Activate” and remove the PW Card.
6. Check the “Voter Verified” box on the BMD ticket, place it into your apron pocket and then into the brown box when you are no longer assisting voters.
7. From the 5 languages screen,
Say to the voter, “I have removed the Poll Worker Card because your ballot is now activated. After you choose a language, you will **touch the box next to your choice** to mark that candidate or measure. When you are making selections for each contest, keep in mind that there may be more options than what you see on the current screen. In that case, there will be a **“more” button** at the bottom of the screen. Touch that button just once and **wait for the screen to change** before you touch it again to see the next group of candidates. If you make a selection unintentionally, that’s ok; just make sure to touch that choice a second time to **deselect** it. When you are finished, you can **review your choices** on the screen and **print your ballot**. Please **wait until the printer completely stops** before removing your ballot as it may print on both sides. When the printing is complete, your ballot will be laying at the top of the printer. **Look it over** (and place it in your **secrecy sleeve**’ or ‘then fold and seal it inside your **envelope**’). Your ballot will be **cast into the Ballot Box** at the checkout station (point to that location). You can see there are **BMD Instructions also printed in 5 different languages** on the inside of this privacy screen. **I will be nearby** if you have any further questions.”

Voter requests an Accessible Voting Session (or a checkmark is found in the BMD Ticket’s Audio Ballot Requested box)

1. **Say to the voter**, “This is a ballot marking device, you will use it to mark your choices, review, and print your ballot. You will cast your ballot at another station. May I take your BMD ticket, please?”
2. If you have not already discussed the specific type of assistance the voter has requested, **say to the voter**, “I see that you have chosen to mark your ballot using audio assistance. Is that right? (If no, you can ask, ‘How would you like to be assisted in marking your ballot?’) Marking an audio ballot can take a while, can I offer you a chair?”
3. If the voter has made a request to be assisted in a way you are not completely prepared for, alert your Site Manager.
4. Insert the PW Card.
5. At the Ballot Activation screen, check the box that says “Enable AVS Controller”.
6. Enter the Sequence # from their BMD ticket.
7. Perform steps 4, 5, and 6 on the left side of this Job Aid, then return to step 8 on this side.
If the voter is a person who is blind or visually impaired, you can read the numbers out loud in order to verify that the sequence numbers match. Alternatively, if the voter prefers, you could ask a third person, such as a person who is assisting them or another Poll Worker, to visually verify that the sequence numbers match.
8. **Say to the voter**, “May I choose a language for you, or would you like to choose one yourself?” If a language you are not familiar with is chosen, refer to the image on step 6 of page 63 of the manual to see the English version of the menu on the following screen.
9. Before selecting the voter’s preferred device on the BMD, hand the voter the ATI device and/or ask the voter to put on the headphones if either will be used. Give them a moment to become familiar with holding the ATI and/or wearing the headphones. Make sure the voter is comfortable and able to reach all parts of the screen if they will be touching the screen themselves.
10. **Say to the voter**, “You have the option for an audio ballot only if you would like the BMD’s screen to be turned off during while you mark your ballot. I will be nearby throughout your ballot marking session if you ever need adjustments made or assistance in any way.” Also be sure to mention any other talking points that apply to this voter that are **bold** **underlined** in step 7 on the left side of this page.
If the voter does not want the screen to be enabled, activate the Privacy Mask.
11. Select the appropriate accessible voting device as requested by the voter. If the audio ballot was activated, it will begin immediately.