



# Officer of Election Basics

## Overview:

This course provides an overview of being an Officer of Election.

## Topics Covered:

- What is an Officer of Election
- Appointment, Qualifications and Terms
- Job Duties, Functions and Roles
- Election Day Overview
- Forms and Paperwork
- Other resources

## What is an Officer of Election?

An Officer of Election is part of a team that conducts elections at a polling place on Election Day. Your job is to conduct the election fairly and lawfully, and to assist voters in a courteous and respectful manner.



## Qualifications, Appointment and Terms:

**Qualifications** - Officers of Election must be competent citizens. If practicable, each officer should be a qualified voter of the precinct they are appointed to serve, but in any case, a qualified voter of the Commonwealth. The assistant chief officer of election, whenever practicable, shall not represent the same political party as the chief officer of election. If representatives for one or both of the 2 political parties are *not* available, citizens who do not represent either of the two political parties may be designated as the chief officer and the assistant chief officer.

**Appointment** - If practicable, officers should be appointed from a list of nominations filed by the political parties entitled to appointments. Parties must file nominations with the Electoral Board at least 10 days before February 1 of each year. The Electoral Board may appoint additional citizens who do not represent any political party to serve as officers. If practicable, no more than 1/3 of the total number of officers appointed for each precinct may be citizens who do not represent any political party. The 2 political parties having the highest and next highest number of votes in the Commonwealth for Governor at the last preceding gubernatorial election must be represented equally. Electoral boards appoint Officers of Election each February.

**Terms** - Officers of Election are appointed for a term not to exceed 3 years. Terms begin March 1. Officers serve for all elections held in their precincts during their terms of office unless a substitute is required or the Electoral Board decides that fewer officers are needed for a particular election.

In a primary election involving a single party, persons representing the political party holding the primary serve as the Officers of Election, if possible.

## Roles, Job Duties and Functions:

Most voters do not know what goes on behind the scenes to make Election Day possible. They just know what they see and experience on Election Day.

Officer of Election roles are set by each locality based on need and staff availability, but typically cover the following functions:

**Greeter** – welcomes voters and directs them to the check-in area; may also encourage voters to get their ID out and ready. Greeters direct voters to signs and other information such as sample ballot items before voters check in.

**Pollbook Officer** – checks in voters using either paper or electronic pollbooks; uses the pollbook to ensure people are registered to vote and marks them as having voted; resolves voter eligibility/registration status issues by working with the chief officer and general registrar. If issues can't be resolved, under certain circumstances the person may be offered a provisional ballot. *See separate Provisional Ballot training for full details on that process.*

**Ballot Officer** – controls and accounts for all the ballots.

**Voting Equipment and Booth Officer** – directs voters to available booths and may provide or obtain assistance upon request; maintains each voter's right to a private ballot at all times; observes voter inserting ballot into optical scan tabulator and assists voter in interpreting and responding to system error messages. Note: if monitoring tabulator/ballot scanner, after instructing voters on where to insert ballot, back away so the voter's ballot choices cannot be seen. Collect privacy folder and return to voting booths.



**Chief Officer** – is an experienced officer of election and receives more in-depth training; supervises and oversees all officers of election and polling place operations on Election Day. The chief is responsible for making sure polls open and close on time and all supplies, forms and ballots are verified and accounted for. The chief can answer most questions on Election Day and knows how and when to escalate issues to the General Registrar or other authorities. Example Duties:

- Picks up election materials and supplies
- Contacts and coordinates team members
- Reaches out to polling place owners
- Swears/affirms all officers of election and pages
- Assigns duties

**Assistant Chief Officer** – is also an experienced officer of election and assists the Chief in carrying out their duties. If the Chief cannot perform their duties for any reason, the Assistant Chief should be able to assume the role of Chief Officer of Election.

**Electoral Board** – Facilitates the election; determines validity of provisional ballots; certifies and reports results to the state

## Election Day Overview:

**Plan Ahead** – You will not be able to leave the polling place during your shift.

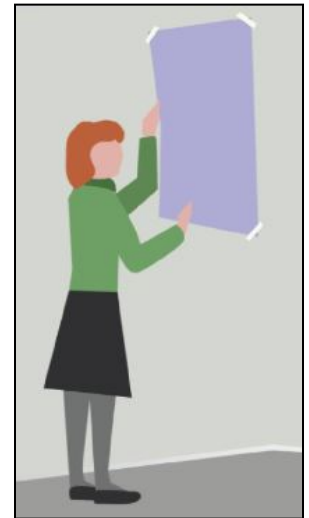
**What to Bring** – Food and beverages, medications, emergency contact information.

**What to Wear** – Comfortable clothing and shoes; remember that many people suffer with asthma or allergy conditions, so strong scents should be avoided.

**Typical Election Day Schedule** – Polls are open from 6 AM until 7 PM unless hours are extended by court order. Chief typically picks up materials the day before Election Day.



- 5 AM: Chief Officer of Election arrives
- 5:15 AM: Officers of Election arrive (subject to general registrar preference)
- 5 AM – 6 AM: Prepare for election
  - Take the oath
  - Welcome authorized representatives
  - Review assignments
  - Setup the polling place *[call general registrar if anything is missing during set-up]*
    - Check supplies/signs/forms; post signs inside/outside of polling place; set-up demonstration equipment and instructional materials
    - Set up pollbook station and pollbooks
    - Lay out forms and reference materials
    - Verify paper ballots; count the ballots sent by registrar and contact the registrar if there are not enough ballots (as planned). Check that the ballots are correct.
    - Set up and verify voting equipment
      - Ensure voting booths and machines are positioned for privacy and booths include a privacy folder for voters to transport ballots to tabulator/scanner.
    - Ensure an emergency ballot box is available, emptied and locked.
  - Complete pre-election paperwork
- 6 AM: open the polls and conduct the election (Chief must call general registrar to report polls are open)
  - This is when voters cast their ballots. Voters in line at the time the polls close are also allowed to vote normally.
    - While polls are open, Officers of Election should be aware of and continuously monitor persons allowed in the polling place, prohibited activities, and voting systems and ballots.
    - Officers of Election are required to track certain types of activities and count special ballots cast. Examples include unusual activity (see “Prohibited Activities” training), provisional ballots (see separate training), requests for assistance casting a ballot and curbside voting.
- 7 PM: close the polls
  - At exactly 6:45 PM, the chief announces, “The polls will close in 15 minutes”.
  - At exactly 7 PM, the chief announces, “The polls are officially closed”.
- 7 PM until...: secure equipment and ballots; complete paperwork; pack materials and supplies.
  - Anyone in line when the polls close at 7 PM must be allowed to vote normally.
  - After all voting is completed, close the pollbooks following local procedures.
  - Welcome and instruct authorized representatives.
  - Complete and sign forms and paperwork following local instructions.
  - Your general registrar and chief officer will provide detailed instructions about how to secure, close, and pack up the equipment and supplies at the end of the evening.



## Forms and Paperwork:

On Election Day, you will work with a lot of different forms, documents and envelopes. In addition to tracking and reporting of election results, information is collected to help audit and ensure the integrity of and access to the ballot.

The Department of Elections provides localities with standard forms and documents to use on Election Day. Some of these may be customized or replaced by the general registrar, so follow local instructions and training to properly complete required paperwork.



In addition to tracking election results, a variety of information is collected using forms on Election Day. Examples include information about incidents, emergencies and unusual activity, spoiled/voided ballots, and pollbook summaries.

## Other Resources:

Two good sources of information to help you properly fulfill your responsibilities as an Officer of Election are:

- **Election Day Guide** – provides a series of reminders and checklists for Officers of Election on Election Day. Your general registrar may provide this document as-is or modify it to fit local needs. The general registrar is your main resource for locality-specific information, instructions and training.
- **What-If document** – provides step-by-step instructions to take in over 20 different scenarios. These are situations we can anticipate may require exceptions to normal processing of voters on Election Day, such as if a voter has moved since registering, what to do if a voter can't present a valid photo ID, or a voter is already marked as having voted. [[2020 version in MS Word format](#)]

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### What to do when...

A complete guide for helping voters with exceptional situations

Identification Problems 1-3
Address Changes Problems 4-8
Pollbook Problems 9-13
Provisional Problem 14
Accessibility Problems 15-18
Absentee Problems 19-20
Extension of Polling Hours Problem 21
Voting Malfunctions Problems 22-23

*Updated August 2020*