

Officers of Election

Lesson 1: Course Overview

Topics to be Covered in this Course:

- Introduction to Elections
- Officers of Election Basics
- People Allowed in Polling Places
- Prohibited Activities in the Polling Place
- Checking In Voters
- Understanding Acceptable ID Rules
- Provisional Ballots
- Same Day Registration
- Emergency Planning and Response
- Accessibility and Etiquette
- Chief and Assistant Chief Responsibilities
- Election Security

Terms:

State – The Commonwealth of Virginia

Locality – The geographical unit of government that is a city or count.

General Registrar – Maintains the official voter registration records for a county or city in accordance with the instructions of the State Board of Elections. General Registrars are also known as Directors of Elections in the Commonwealth of Virginia.

Voter Registration – The registration process for participating in Virginia elections.

Certification of Sworn Affidavit (OOE Oath) - A form, that when signed, attests that the signatory will abide by all VA laws and rules regarding the registration of voters.

ELECT - The Virginia Department of Elections

Lesson 2: Introductions to Elections in Virginia

Topics Covered in this Section:

- Election Administration
- Types of Elections

Election Administration

Local Administration of Elections - Elections are administered at the local level in Virginia. Each county and independent city is considered a political 'locality' and administers its own elections.

Localities administer elections through the:

- Local Electoral Board - The local electoral board has overarching responsibility to administer elections for a county or city. It appoints both the general registrar and officers of election for the locality.
- General Registrar's Office - The Director of Elections/General Registrar maintains an office in the locality, and performs most administrative duties, most notably; voter registration.
- Officers of Election - Officers of election work in polling locations on Election Day. These are the people voters see and interact with when voting.

State Entities - While elections are administered locally, two state bodies provide oversight and regulation:

- The State Board of Elections - The State Board of Elections is an administrative decision-making body for elections at the statewide level. Decisions made by the State Board can affect the conduct of elections statewide.
- The Virginia Department of Elections - The Department of Elections provides policy, training, and guidance for general registrars and local electoral boards. The agency manages a centralized database of voter and election related information.

Legal Requirements for Fair, Legal, & Uniform Elections

Voter registration and elections must be administered in a fair, legal and uniform manner across the state. Localities must adhere to federal, state, and local laws and regulations.

Three types of elections in Virginia:

- General Elections - General Elections fill offices for elections regularly scheduled by law. Regularly scheduled elections include those for federal, state, and local offices such as

the U.S. Congress, statewide, and local offices including those of the Governor, State Senator, Sheriff, School Board, and many more.

- Special Elections - Special Elections are held for unexpired terms and referenda. Also, if someone cannot complete their entire term of office, a Special Election is held to fill the seat. Special Elections may also be held to decide an outcome of a referendum on the ballot. Special Elections can be held on the same day as regularly scheduled General Elections.
- Primary Elections - Primary Elections determine which candidates will be the nominees of Virginia political parties to appear on the ballot in a future General Election. Primary Elections do not fill any offices. In Dual primaries, the two parties' primaries are held on the same day. Virginia law permits a voter to vote in either primary, but in only one held on the same day.

Lesson 3: Officers of Election Basics

This Section Reviews the Role of an Officer of Election

Topics Covered in this Section:

- Role of an Officer of Election
- Qualifications, Appointments, 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. As an Officer of Election, your job is to conduct the election fairly and lawfully, and to assist voters in a courteous and respectful manner.

Qualifications, Appointments and Terms:

Click on each tile below to learn about the requirements and rules related to being an Officer of Election.

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 two 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 ten 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 two 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 three 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.

Job Duties, Functions, and Roles:

- Greeter - Welcomes voters and directs them to the check-in area. The greeter may also encourage voters to refer to signs that list options for acceptable forms of ID, as well as other voter and polling site information.
- Ballot Officer - Controls and accounts for all the ballots.
- Equipment & 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; advise a voter on how to insert their ballot into optical scan tabulator and assists voter in interpreting and responding to system error messages.
- 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 Director of Elections/General Registrar. If issues cannot be resolved, under certain circumstances the person may be offered a provisional ballot. *(See separate Provisional Ballot training for full details on that process.)*

- Chief Officer - An experienced officer of election that 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. The Chief Officer of Election also 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, and assigns duties.
- Electoral Board - Facilitates the election and determines validity of provisional ballots; certifies and reports results to the state.
- Assistant Chief Officer - 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.

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. The Chief Election Officer typically picks up materials the day before Election Day.

Example Timeline of Election Day

Please review the example timeline below of an 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 the election

- Take the oath
- Welcome authorized representatives

- Review assignments
- Setup the polling place (call the general registrar if anything is missing during setup)
 - Check supplies/signs/forms; post signs inside/outside of polling place; setup demonstration equipment and instructional materials
 - Setup pollbook station and pollbooks
 - Lay out forms and reference materials
 - Verify paper ballots; count the ballots sent by the registrar and contact the registrar if there are not enough ballots (as planned). Verify the ballots are correct.
 - Setup 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
- Complete pre-election paperwork

6 AM

Open the polls and conduct the election

(The Chief Officer of Election must call the 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, 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 Officer of Election announces, "Polls will close in 15 minutes".

- At exactly 7 PM, the Chief Officer of Election 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 of Election will provide detailed instructions regarding 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 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 fulfil your responsibilities as an Officer of Election are: (See Formswarehouse for these documents)

- [Election Day Guide\(opens in a new tab\)](#) - 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\(opens in a new tab\)](#) - 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 Elections Day, such as if a voter has moved

since registering, what to do if a voter cannot present a valid photo ID, or a voter is already marked as having voted.

Lesson 4: People Allowed in Polling Places

Groups of People Allowed in the Polling Place

Voters, election officials, voting equipment custodians, authorized representatives, neutral observers, news media, and minors are allowed in the polling place.

Click the box for each item below as you review who is allowed in the polling place.

- Voters - Voters are allowed in the polling place. This includes any person the voter brings by request to assist with casting a ballot and any minor under the age of 15 accompanying a parent. As is covered in more detail in the training material, *Officer of Election Basics*, even voters are subject to restrictions. For example, voters are not allowed to campaign, disrupt the polling place, or hinder the election.
- Election Officials - This group includes Officers of Election, members of the state electoral board, representatives of the Department of Elections authorized by the general registrar or local electoral board members.
- Voting Equipment Custodians - Designated pollbook and voting machine equipment custodians are allowed. They must be authorized by the general registrar.
- Observers - This group includes authorized representatives, neutral observers and the media. Observers cannot delay the voting process, in any way try to influence a voter, be in a position to see marked ballots, otherwise impede the election, assist voters, or wear anything indicating they can assist voters.
- Authorized Representatives - This group must be a qualified voter and must have a written statement from the party chair or independent candidate (a photocopy of statement is acceptable). No candidate whose name is printed on the ballot can serve as a representative of a party or candidate. Authorized representatives can carry cell phones but cannot take pictures or video inside the polling place.

*A polling place must permit one of each party or candidate, but only one each per polling station and no more than three in the room. The chief officer determines how close representatives and observers can be to voters, equipment, and polling stations.

- Neutral Observers - The electoral board or general registrar can authorize if and how many neutral observers can be present. Authorization must be in writing.
- Media - We must allow for a reasonable amount of time for media visits while polls are open. There are many activities prohibited for the media. Please see the training materials on *Prohibited Activities* for more detail.

- Candidates - This group of people may vote, but may not campaign at the polling place. They may visit a polling place for up to 10 minutes per polling place where they are on the ballot, per election day (§24.2-604(E)).

Lesson 5: Prohibited Activities in the Polling Place

Activities are Prohibited Depending on Location

Those locations include the area inside the polling place and the prohibited area outside the polling place. Any person who is found by a majority of the officers of election present to impede the orderly conduct of the election or violate any of these rules may be required to leave the polling place and the prohibited area.

What is the 'Prohibited Area'?

The Prohibited Area is defined as the area within 40 feet of any polling place entrance. In this area, it is unlawful for anyone to give, tender, or exhibit any ballot, ticket, or other campaign material or solicit or attempt to influence any person in casting their vote.

What is Unlawful in the Polling Place *and* Prohibited Area?

- Knowingly possessing a firearm while inside or within the 40 foot area of the polling place, including one hour before and one hour after the use of a building as a polling place. Exceptions include a qualified law-enforcement officer or retired law-enforcement officer, any person occupying his own private property that falls within 40 feet of the polling place, or a licensed armed security officer whose employment or performance of his duties occurs within 40 feet of the polling place.
- Loitering or congregating in the polling place and prohibited area
- Hindering or delaying qualified voters from entering or leaving
- Hindering or delaying any officer of election or voter
- Neutral observers and authorized representatives assisting voters

What is Unlawful in the Polling Place?

Campaign, give, tender, or exhibit any ballot, ticket or other campaign material to any person.

Solicit or in any manner attempt to influence any person casting their vote.

Be in a position to see the marked ballot of any voter.

What is Allowed *Outside* the Prohibited Area?

Campaigning in a way that does not hinder voters or officers of election. Media may conduct interviews and broadcast reporters' remarks.

Campaign Stickers, Buttons, and Apparel:

Only Voters are allowed to display or wear campaign stickers, buttons, wristbands, and apparel in the polling place. All others, like officers of election and authorized representatives, cannot wear any such apparel.

What is Allowed in the Voting Booth?

Voters are allowed to take sample ballot guides and campaign material with them into a voting booth. Voters may take photos of themselves or of their own ballot. However, they cannot take pictures of other voters' ballots or otherwise disrupt the election. (Official Opinion - Bell - Lind - 16-038 (state.va.us))

News Media and the Polling Place:

News media may visit and film or photograph inside the polling place for a reasonable and limited period of time while the polls are open. The media must comply with all prohibitions and may not film or photograph any person who specifically asks them not to, as well as the voted ballot in such a way that divulges how any individual voter is voting.

The media may not film or photograph the voter list or any other voter record or material at the precinct in such a way that it divulges the name or other information concerning an individual voter.

Officers of election may require any person who is found by a majority of the officers present to be in violation of these provisions to leave the polling place and the prohibited area.

Lesson 6: Checking in Voters

This section reviews procedures prescribed by Virginia state code regarding voter check-in on Election-Day.

Confirm Voter's Identity - Name, address, and acceptable form of ID. Ask the voter for their full name and current residence address. The voter may respond orally or in writing. Repeat, in a voice audible to the voter and authorized representatives present, the full name provided by the voter.

Ask the voter for an acceptable form of ID. If the voter does not have an acceptable ID, they may sign an ID Confirmation Statement. What to do if a voter does not have an ID and refuses to sign the ID Confirmation Statement is detailed in separate officer of election training on *Understanding Acceptable ID Rules*.

Confirm Voter Information in Pollbook - All voters who provide an acceptable ID or sign the ID Confirmation Statement should be checked in at the pollbook. Voters are looked up in the pollbook by name. Names should be identical or substantially similar. Note, the address may be different.

If the name in the pollbook matches the name stated and present on the ID *AND* the voter is eligible according to the pollbook, *THEN* mark the voter's pollbook record as 'Voted' and provide a ballot. This only indicates that the voter was given a ballot. There are instances in which voters do not cast a ballot after receiving it (i.e. decide not to vote after they see the candidates).

The voter's name is considered a match if the name stated and presented on the ID matches the pollbook either identically or substantially.

Example: Frederick and Fred are a match.

Once a voter has been provided a ballot they must remain in the presence of the officers of election until they have finished voting.

If there is incorrect or missing information on the voter's record in the pollbook, ask the voter to provide or update the information.

**See the chapter on 'Same Day Registration' for more information.*

Incorrect Residence Address - If the current residence address stated by the voter is different from the address in the pollbook, give the voter a form to update the voter's registration information. This form should be placed in an envelope provided for such forms for transmission to the general registrar. The voter is still allowed to vote if their new address is in the same locality.

Best Practices:

1. Avoid casual conversation with voters, even if you know them.
2. Do not make *casual* comments about a voter's name or any personal information on their identification or pollbook data.
3. Never engage in political conversation with voters or fellow poll workers while in the polling place.

Lesson 7: Understanding Acceptable ID Rules

Topics Covered:

- Acceptable Forms of ID
- If a Voter Has No Acceptable ID

Legal Requirements:

Virginia law requires all voters to show an acceptable form of ID at the polls before being allowed to cast a ballot. If a voter does not have an acceptable form of ID, the voter may sign an ID Confirmation Statement.

Purpose of ID:

A voter's ID is used as a means of confirming the identity of the voter. The address on the ID *does not have to match* the address in the pollbook.

For an ID to be Valid:

1. It must appear to be genuinely issued by the agency or issuing entity appearing on the document.
 - a. Example: If a Virginia driver's license is offered as ID, it cannot be a photocopy of the license; it must be the actual driver's license itself.
2. The document must be current or have expired within the preceding 12 months. IDs issued by the DMV do not need to meet this requirement.
 - b. The expiration data is not considered when determining if the ID is valid for voting purposes.
3. The officer of election will consult the chief officer of election if there is a question about whether a document is valid.

A Voter Identification List is provided on the Department of Elections website.

Examples of Acceptable Forms of ID:

- Virginia DMV-issued photo ID
- Virginia DMV-issued drivers' license
- Valid U.S. Passports
- Employer-issued photo ID
- Student ID with a photo from a college or university outside of Virginia
- Student ID issued by a public or private school in Virginia
- ID cards issued by the United States government, the Commonwealth of Virginia, or local Virginia government
- Virginia issued voter photo ID card
- Voter confirmation documents
- Copy of current utility bill, bank statement, government check, or paycheck containing the name and address of the voter
- Other government document containing the name and address of the voter

For the complete list of acceptable ID, see the Voter Identification Chart on ELECT's website: <https://www.elections.virginia.gov/voter-pocket-guide/>.

Are electronic versions of acceptable forms of ID for voting allowed?

An electronic form of the following documents is acceptable for voting purposes: a current utility bill, bank statement, government check, paycheck, or other government document containing the name and address of the voter. The Virginia code only requires a copy of these documents; thus, electronic forms of these documents suffice for voting purposes.

What does 'Current' mean when referring to the Acceptable IDs mentioned in this training?

An ID is valid if:

1. the document appears to be genuinely issued by the agency or the issuing entity appearing upon the document
2. the document shall be current or have expired within the preceding 12 months

All forms of acceptable ID, with the exception of a Virginia DMV-issued driver's license or state ID card, cannot be more than 12 months old from the date the voter offers to vote. If a voter presents a copy of a utility bill, bank statement, government check, paycheck, or other government document containing the name and address of the voter that is more than twelve months old from the date the voter offers to vote, you should request that the voter present another form of ID that is acceptable. If the voter does not have another form of ID on the acceptable list, the voter may sign an ID Confirmation Statement form in order to vote a ballot.

If a Voter Has No Acceptable ID:

If the voter does not have an acceptable ID, the voter may sign an ID Confirmation Statement and vote normally. If the voter does not have an acceptable ID and refuses to sign an ID Confirmation Statement, the voter must vote a provisional ballot. Please review training materials on 'Provisional Ballots'.

Below is an example of what the Confirmation Statement tear-off form looks like:

ID Confirmation Statement - § 24.2-643 of the Code of Virginia

A Officer of Election:

Precinct No./Name: _____ Date: _____ O of E Initials: _____

B Affirmation of Voter:

If you do not complete this statement or show acceptable ID, you will be required to vote a provisional ballot in this election.

Subject to penalty of law, I do hereby affirm that I am the identical person I represent myself to be.

Signature of voter: _____ Date: _____

Printed name of voter: _____

Birth Year (optional) __|__|__|__ Last 4 digits of Social Security # (optional) __|__|__|__

WARNING: Making a materially false statement on this form constitutes the crime of election fraud, which is punishable under Virginia law as a felony. Violators may be sentenced to up to 10 years in prison and/or fined up to \$2,500. §24.2-1016