



# City & County of San Francisco Department of Elections Pollworker Training Manual



*This election's commemorative pin design celebrates  
San Francisco's diverse community of pollworkers  
who join hands to offer excellent service for all our voters.  
Thank you!*

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Municipal Election  
Tuesday, November 3, 2009  
Polls are open 7:00 am - 8:00 pm

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## **Reference**

Important phone numbers.....	back cover
English/Chinese/Spanish Clerk scripts & glossary.....	class handout

*Procedures in this manual comply with Federal, State, and Municipal election law and must be followed on Election Day.*

## ***Pollworker Pre-Election Day Preparation***

- Vote.* Request to be mailed a vote-by-mail ballot (by October 27<sup>th</sup>) or be issued a vote-by-mail ballot in person at City Hall (starting October 5<sup>th</sup>).
- Locate assigned polling place.* Practice the trip to find the best route and how long it takes. You must arrival at the polling place **by 6:00 am** on Election Day.
- Review this manual.* Pay special attention to the job cards, which give step-by-step instructions to follow throughout Election Day.
- Get ready the day before.* Pack food and water, extra clothes for warmth, and rain gear. Business casual attire and comfortable shoes are appropriate.

### ***Inspectors: Additional Required Preparation***

- If assigned to a polling place: pick up the Rice Bag after the training class. Use the checklist in the Inspector Folder to check all supplies and ballots were received. Keep the Rice Bag secure and bring it to the polling place on Election morning.
- Call Clerks (see Pollworker Payroll sheet in Inspector Folder).
  - Make sure every Clerk knows how to get to the polling place by 6:00 am. If a Clerk cancels, call Pollworker Division at (415) 554-4395 immediately.
- Call the polling place (see Staffing and Bilingual Requirement form).
  - Confirm polling place will be unlocked by 6:00 am.
  - If scheduled to open the polling place, make sure keys are in the Inspector Folder. Confirm what to do with the keys at the end of Election Day.
- The FED will call the day before the Election to check in. Inform the FED of any issues or concerns.
- Write letters on blank tabs and attach to bottom of white Roster pages. (There are only 23 tabs, so some combine some letters onto one tab (PQ, XYZ).
- If there is a gray “Supplemental Vote-by-Mail Voters” list in the Inspector Folder, write “*VBM Ballot Issued*” in red **UNDER** those Voters’ names in Roster. **Do not write anywhere in signature box!**

Voter’s Name and Residence	Signature
100 MAIN STREET      VOTER, S. FRANCIS <span style="color: red; font-style: italic;">VBM Ballot Issued</span>	

*Strongly Recommended*

- Visit polling place to become familiar with the grounds, building and voting area.
- If the polling place owner gives permission, set up booths and tables.  
**Do not unseal, unlock or set up voting machines before Election Day.**
- If the Inspector Folder has a Special Instructions sheet on how to set up the polling place, it is a legal requirement to follow the instructions. If there are no Special Instructions, use the layout requirements on page 5 to sketch a plan.

# ***The Pollworker Mission***



## ***1. Protect Voter Rights***

- Follow the job cards to insure all elections laws are obeyed.
- Meet Voting Rights Act requirements by displaying all materials in English, Chinese, and Spanish.
- Meet Americans with Disabilities Act and Help America Vote Act requirements by displaying and offering the accessible voting machine, seated booth, pen grip, magnifying glass, Braille, and large-print information. (A sip/puff device and a head-pointer are available; call the Election Center to request.)
- Protect every Voter's right to cast a secret ballot free from intimidation: report any electioneering, invasion of privacy, or tampering to the Election Center.

## ***2. Serve all Voters with respect***

- At all times, wear nametag in each language you speak to identify yourself as an election official available to assist Voters.
- Show respect in your actions, words, tone of voice, and gestures to people of every ethnicity, race, color, national origin, sexual orientation, age, language, ability, income, religion, creed, political affiliation, etc.
- When assisting a Voter with a disability, put the person first (say "person with a disability" not "disabled person") and treat him or her as any other Voter. See next page for addressing specific needs.
- To remain alert to Voters' needs, do not use personal electronic devices in the polling place.

## ***3. Offer Assistance***

- Ask if and how you may assist. Let the Voter tell you what he or she prefers.
- Do not ask Voters who need assistance to step aside or wait.
- If you're not sure how to assist a Voter, call the Election Center.
- When needed, offer language assistance from a bilingual pollworker, the tri-lingual materials displayed on Voter Information Kiosk, and/or call a Language Assistance Hotline.
- If a Voter asks you or someone else to mark his or her choices on a ballot, fill out the Assisted Voters List in the front of the Roster. Do not discuss how the ballot was voted.

## ***The Pollworker Mission (continued)***

Visit [www.youtube.com/user/sfelections](http://www.youtube.com/user/sfelections) for a video on serving voters with disabilities



*Pollworker listening carefully and patiently*



*Pollworker speaking to Voter, not assistant*



*Guide dog pressing door opener for person with mobility limitation*



*Guide pony leading person with sight limitation*

### ***Serving Voters with speech limitations***

- Be patient. Wait for the Voter to finish speaking. Do not interrupt or attempt to finish a sentence.
- Listen carefully. To clarify a Voter's statement, ask a yes/no question restating what was understood.
- Tools: pen for Voter to write questions.

### ***Serving Voters with hearing limitations***

- If Voter uses an interpreter, address Voter directly.
- If Voter reads lips, face him or her directly and speak clearly in a normal tone of voice.
- Do not speak louder unless Voter requests.
- Tools: Telephone-typewriter (TTY) hotline: (415) 554-4386. Pen to write answers.

### ***Serving Voters with mobility limitations***

- Never touch or move a walker, cane, or other equipment without Voter's permission.
- Sit or crouch down to speak with Voter who is seated or in a wheelchair to relieve neck strain for Voter.
- If Voter brings an assistant, address Voter directly.
- Tools: accessible voting machine, seated booth, pen grip, curbside voting. Call Election Center if a sip/puff device or headpointer is requested on Election Day.

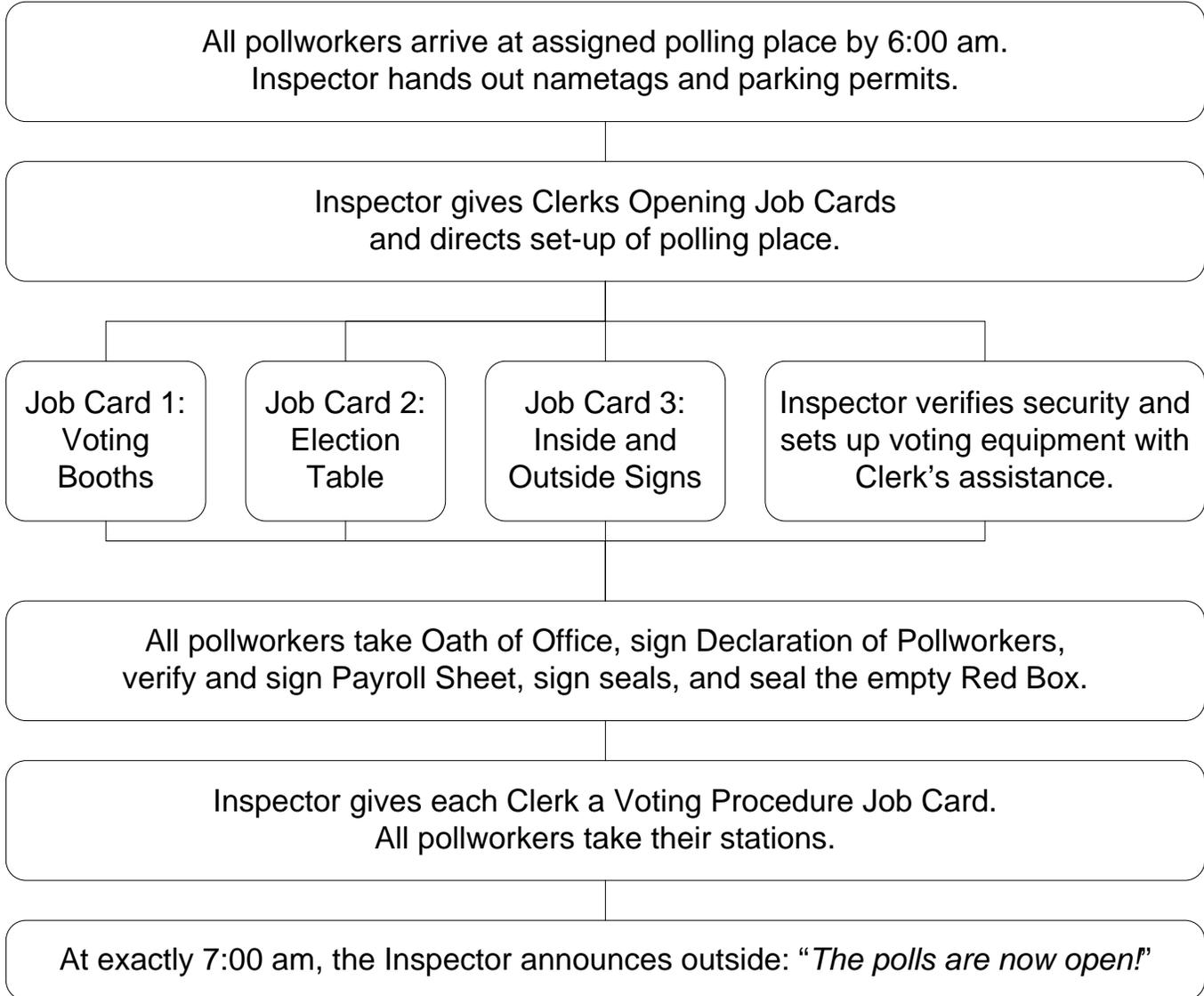
### ***Serving Voters with sight limitations***

- Greet Voter, identify yourself as a pollworker, and offer to describe how the polling place is arranged. Then ask if and how assistance may be given.
- If Voter asks to be guided, offer an arm or shoulder for Voter to hold, then walk slightly ahead of Voter.
- Do not distract guide animals by petting or talking to them. The animal needs to focus on the job.
- Tools: magnifying lens, audio voting (Edge), large-print, and Braille information.

## ***Overview of Opening Procedures***

On Election Day, Inspectors give Clerks opening job cards which have step-by-step instructions for setting up the polling place. The Inspector also has paperwork for all pollworkers to complete.

Opening is a busy time; everything must be completed so the polls open at exactly 7:00 am. To prepare, look at the overview below and study all the opening job cards.



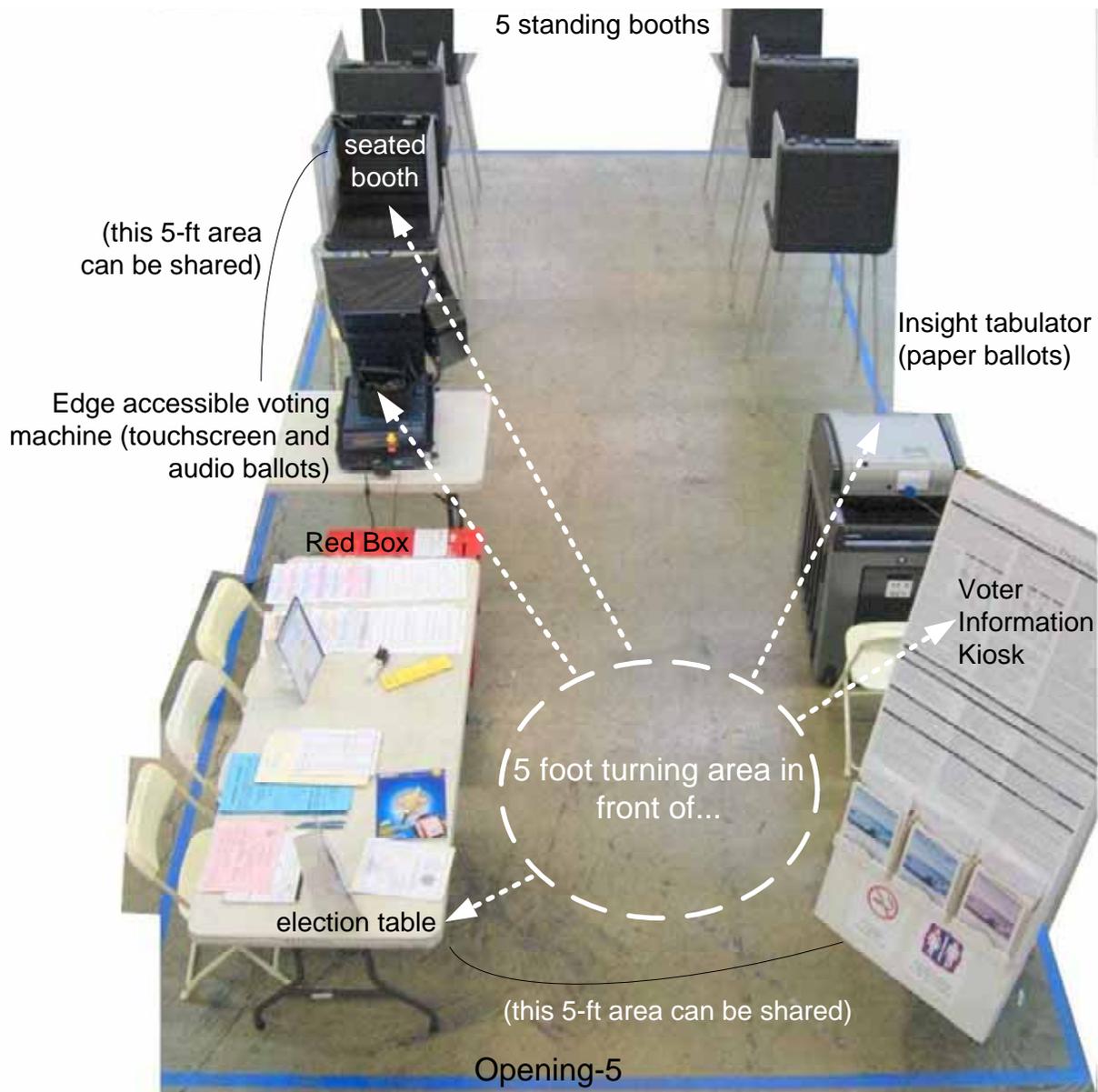
### ***Call the Election Center immediately if:***

- the polling place is locked at 6:00 am
- the Inspector is not there at 6:00 am
- voting equipment is unavailable or isn't working
- Roster, ballots or other key materials are missing
- you think your polling place will not be ready to begin voting at 7:00 am

# ***Polling Place Layout Requirements***

Visit [www.youtube.com/user/sfelections](http://www.youtube.com/user/sfelections) for a video on setting up accessible polling places.

- Post signs to direct all Voters towards the accessible entrance.
- Create clear, wide path from election table to the Edge, Insight and seated booth, with a 5-foot turning space in front of each, then arrange remaining equipment so voters will travel smoothly:  
entrance → election table → booth → voting machine → exit
- Place Insight, Edge, and Red Box where visible to Voters and within reach of pollworkers.
- Place Voter Information Kiosk in a location easily seen by Voters to display legally required information.
- Turn the voting booths to the side for privacy.
- Tape down all cords that are on the floor.
- Place safety cone (if provided) to warn Voters of objects that stick out or hang down or to cover cracks, drains, etc.



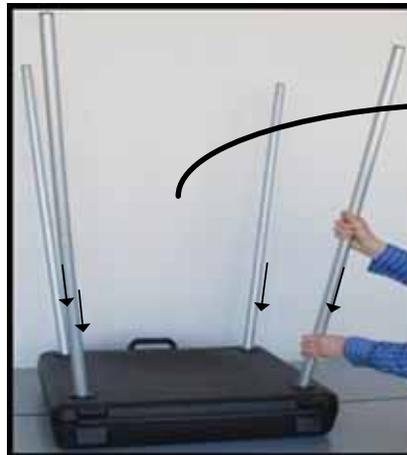
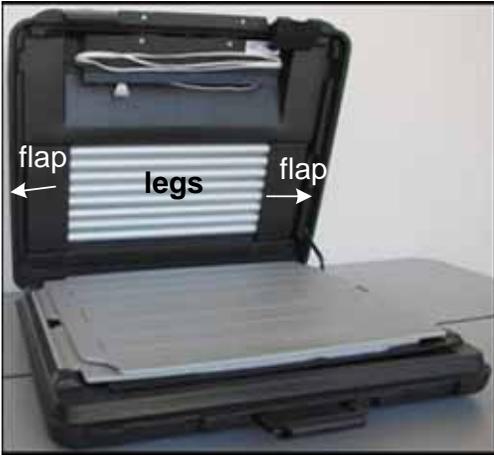
# Opening Job Card 1: Voting Booths

## Polling Place

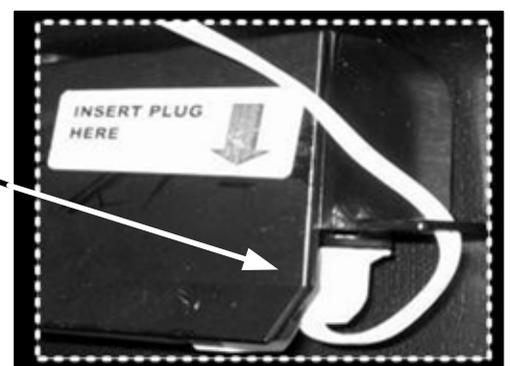
- Standing voting booths (5)
- Seated voting booth (1)

## Red Box

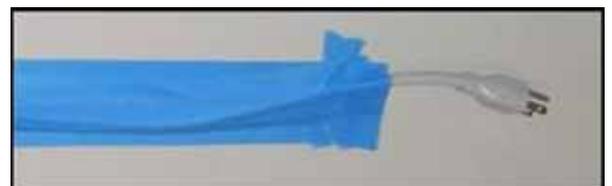
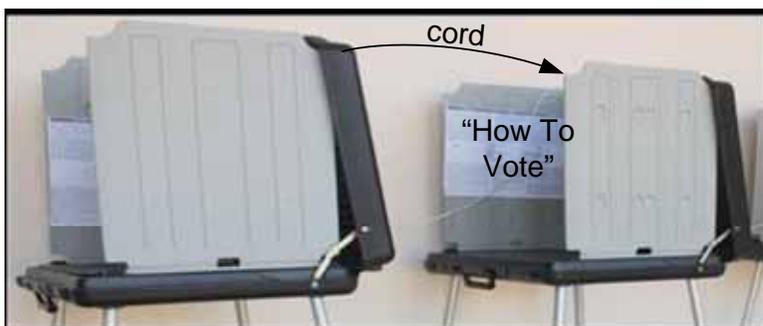
- Extension cord and power strip (if needed)
- Blue masking tape



1. Open case. Pop black flaps open and take legs out. Close flaps.
2. Close case. Turn it over and firmly twist legs into holes. Set booth on its legs.



3. Open case. Fit gray sides into notches.
4. Daisy-chain lights: plug 1<sup>st</sup> booth's cord into 2<sup>nd</sup> booth's socket (located inside booth at right end of tube light bulb). Then plug 2<sup>nd</sup> booth's cord into 3<sup>rd</sup> booth's outlet, etc. Plug last cord into wall socket or extension cord.



- Turn voting booths so that pollworkers at the election table and other Voters cannot see into the booths. Run all cords to the same side and around the back of booth.
- Check "How to Vote" sign is posted in booth.
- Check cords: on the ground? tape them down!

## ***Opening Job Card 2: Election Table***

### *Polling place*

- Election table
- (2) chairs

### *Insight Bin 1*

- Edge Card Activator
- Edge audio keypad

### *Red Box*

- Blue secrecy sleeves
- "We Can Assist You" sign & stand
- Yellow demonstration ballot pad
- Magnifier
- Pen grip
- Manila election table folder for materials
- Pink Provisional Envelopes
- Voter registration cards
- Translated materials request form

### *Rice Bag Supply Pack*

- (2) Ballpoint pens
- (12) Ballot-marking pens

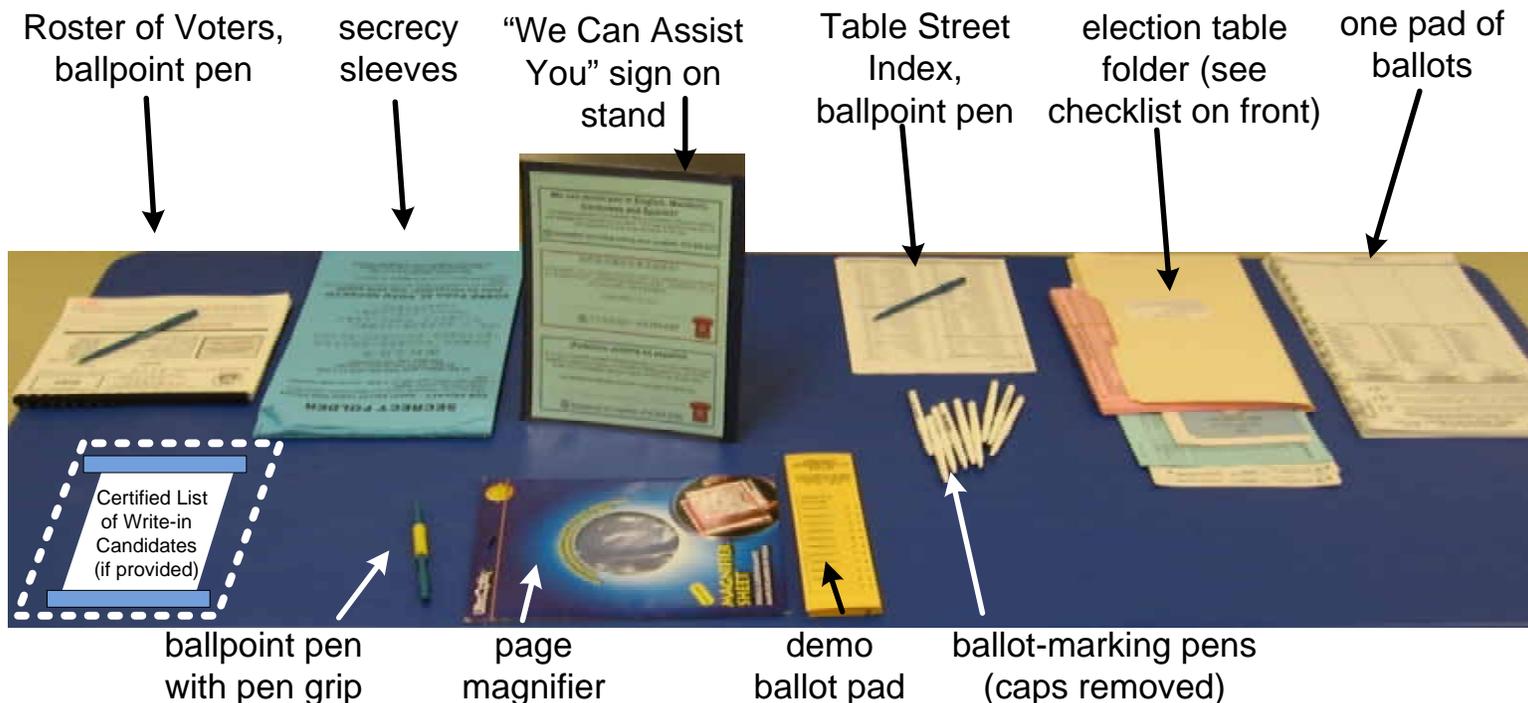
### *Rice Bag*

- (1) Pad of ballots
- Certified List of Write-in Candidates (if provided)

### *Inspector Folder*

- Roster of Voters
- "Table" copy of Street Index
- Blue polling place list
- Citywide precinct map

1. Place all materials from checklist where they are shown in the picture below.
2. Inspector will place Card Activator and Audio Keypad behind the election table.



# Opening Job Card 3: Inside Signs

## Polling Place

Voter Information Kiosk

## Red Box

Voter Information Pamphlet: 1 English, 1 Chinese, 1 Spanish

Large-print information: 1 English, 1 Chinese, 1 Spanish

Braille Edge instructions: 1 English, 1 Spanish

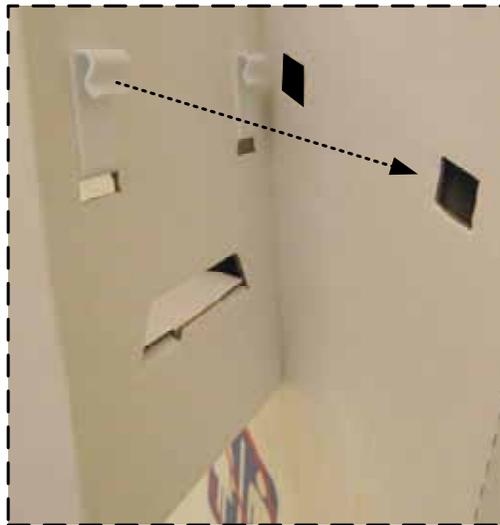
Voter Bill of Rights sign

## Inspector Folder

"Posted" Street Index

1. Set up Voter Information Kiosk where Voters can easily see it.

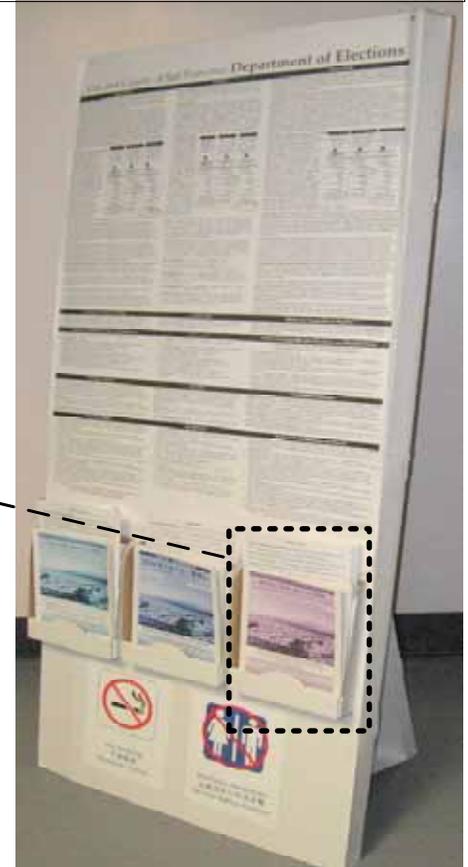
2. Hook bottom of S-clips into slots on back of pocket, then insert top end of S-clip into slots on front of Voter Information Kiosk.



3. In each language's pocket, place **one**:

- City Voter Information Pamphlet
- Large-print voting information
- Braille voting information (English and Spanish)

4. Post Voter Bill of Rights and Posted Street Index directly outside the door to the room where voting will take place at a height accessible to people using wheelchairs.



# Opening Job Card 3: Outside Signs

## Polling Place

- Plastic "Polling Place Vote Here"
- Orange cone and arrow sign (if provided)

## Inspector Folder

- PCT # card (and stick-on sleeve if needed)
- Accessible sign (if provided)

## Red Box

- Blue masking tape
- "Polling Place Approximately 100 Feet" signs
- Directional signs (if needed)

1. Post the "Polling Place Vote Here" sign so Voters can see it from the street, with the precinct number card inserted into the plastic sleeve.



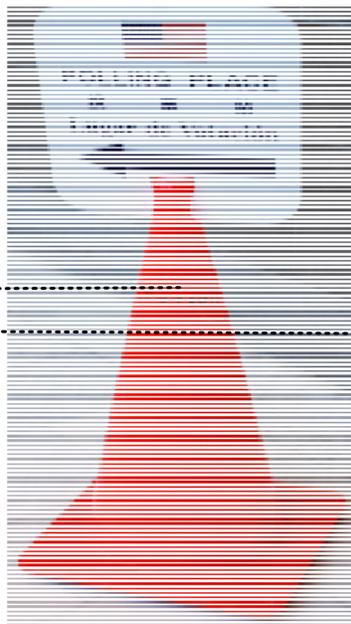
2. Post the Accessible sign (if provided) to direct all Voters towards the accessible entrance.



3. Walk 35 steps in each direction from the door of the polling place room to post "Polling Place Approximately 100 Feet" signs. Make sure blue arrows point TOWARDS polling place!



4. If the polling place room entrance cannot be seen from the street, place the orange cone (if provided) or directional signs to guide Voters.



## Overview of Voting Machines

### The Insight

The Insight records standard votes cast on paper ballots and deposits the ballots in a secure bin.

**It is Department policy that Voters must be issued a paper ballot unless they request to use the accessible voting machine.**

### The Edge

The Edge records standard or provisional votes cast using its touchscreen or audio keypad by printing the voter's selections for the voter to confirm. This legally-required Voter-Verified Paper Audit Trail (V-VPAT) is stored in the secure printer. A sip/puff or headpointer for use with this machine may be requested by calling the Election Center.

## Overview of Ranked-Choice Voting (RCV)

On the November 3<sup>rd</sup> 2009 ballot, San Francisco voters will use ranked-choice voting to elect the City Attorney and Treasurer as required by the City Charter.

<p>FAVORITE S.F. ATTRACTION 最喜愛的三藩市景點 ATRACCIÓN PREFERIDA DE S.F.</p> <p>FIRST CHOICE 第一選擇 PRIMERA SELECCIÓN</p> <p>Vote for One 請選一名 Vote por Uno</p> <p>Alcatraz Island 監獄島 Isla de Alcatraz</p> <p>WRITE-IN / 寫入 / NO LISTADO</p>	<p>FAVORITE S.F. ATTRACTION 最喜愛的三藩市景點 ATRACCIÓN PREFERIDA DE S.F.</p> <p>SECOND CHOICE 第二選擇 SEGUNDA SELECCIÓN</p> <p>Vote for One - Must be different from your first choice 請選一名 / 必須與第一選擇不同 Vote por Uno - Deberá ser diferente de su primera selección</p> <p>Alcatraz Island 監獄島 Isla de Alcatraz</p> <p>Mission District Murals</p> <p>WRITE-IN / 寫入 / NO LISTADO</p>	<p>FAVORITE S.F. ATTRACTION 最喜愛的三藩市景點 ATRACCIÓN PREFERIDA DE S.F.</p> <p>THIRD CHOICE 第三選擇 TERCERA SELECCIÓN</p> <p>Vote for One - Must be different from your first and second choices 請選一名 / 必須與第一選擇和第二選擇不同 Vote por Uno - Deberá ser diferente de su primera y segunda selección</p> <p>Alcatraz Island 監獄島 Isla de Alcatraz</p> <p>WRITE-IN / 寫入 / NO LISTADO</p>
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1. The ranked-choice ballot lists all candidates in three columns. In an election where multiple candidates are running, the Voter may mark one first-choice in Column One, one second-choice in Column Two, and one third-choice in Column Three. If fewer than three candidates are running or the Voter wishes to rank fewer than three candidates, extra columns should be left blank.
2. In this election, only one candidate for each office filed by the deadline to appear on the ballot. By law, these contests must still appear on a ranked-choice ballot to allow for certified write-in candidates who may file up until October 20, 2009. If any write-in candidates file by the deadline, this list will be available at the election table.
3. To vote for a write-in candidate, the Voter draws a line connecting the head and tail of the arrow pointing to the write-in space **and** writes the name to the left of the arrow. Only votes for certified write-in candidates can be counted.
4. Ranked-choice voting instructions are printed on the ballot and posted in each voting booth. If a Voter has any questions, call the Voter Assistance Hotline (back cover).

# Overview of Voting Procedures

This section provides a start-to-finish overview for each of the three main categories of Voters. See the Voting Procedures Job Cards (starting on page 14) for step-by-step instructions for each pollworker job. Review where each Voter signs, what each Voter receives to keep the ballot secret, and where each ballot is deposited.

## **1. Standard Voters:** correct address, no note under name in Roster

<b>Residence</b> 326 BRAZIL AVE	<b>Voter's Name</b> ADAMS, DONALD S.	<input type="radio"/>	<b>Signature</b> 
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- **Roster Clerk** confirms **Voter's** name and address, locates Voter in Roster, and checks no notes appear *under Voter's name*.
- **Roster Clerk** fills in bubble next to the signature line.
- **Street Index/Ballot Clerk** checks **Voter** off Street Index.
- **Voter** signs in Roster on signature line next to his name.
- **Roster Clerk** says "You will be issued a paper ballot unless you request the accessible voting machine" and hands **Voter** a blue secrecy sleeve.
- **Street Index/Ballot Clerk** states required information and hands **Voter** receipt stub, ballot, and ballot pen.
- **Voter** goes to booth and marks ballot with pen.
- **Insight Monitor** checks **Voter** has blue secrecy sleeve.
- **Voter** inserts ballot into Insight to cast vote, then returns pen and secrecy sleeve.

### *If Voter requests accessible machine*

- **Inspector** activates voter card and gives to **Voter** with offer to assist.
- **Voter** inserts card into Edge, uses machine to mark ballot, confirms vote via audio and/or paper print-out, casts vote, then returns card to pollworker.

## Overview of Voting Procedures (continued)

### 2. Vote-by-Mail (VBM) Voters: “VBM Ballot Issued” under name in Roster

Residence	Voter's Name		Signature
130 LISBON ST	AHERN, JILL <i>VBM Ballot Issued</i>	<input type="radio"/>	_____

- **Roster Clerk** confirms Voter's name and address, locates Voter in Roster but sees *under Voter's name* that Voter was issued a ballot before Election Day.
- **Roster Clerk** asks **Voter** to choose one of three options:
  - a. Vote VBM ballot at any San Francisco polling place
    - **Roster Clerk** asks **Voter** to check VBM envelope is signed and sealed.
    - **Voter** does **not** sign Roster.
    - **Voter** inserts signed, sealed VBM envelope into Red Box.
  - b. Surrender VBM ballot at home polling place and vote standard ballot
    - **Roster Clerk** asks Voter to seal ballot in VBM envelope.
    - **Roster Clerk** writes *SURRENDERED* on envelope and inserts into Red Box.
    - **Voter** does sign Roster.
    - *This is now a standard Voter--see procedures on page 11.*
  - c. Vote provisionally if unable to surrender VBM ballot
    - **Roster Clerk** asks **Street Index/Ballot Clerk** to conduct provisional voting for this reason.
    - Voter does **not** sign Roster.
    - *This is now a provisional Voter—see procedures on page 13.*

## ***Overview of Voting Procedures (continued)***

Provisional votes are not counted on Election Day. After Election Day, the Department of Elections investigates the information written on the envelope. It is very important that all information is CORRECT, CLEAR, and COMPLETE so that eligible voters can be identified and the ballots included in the final election results.

### ***3. Provisional Voters***

- **Roster Clerk** asks **Street Index/Ballot Clerk** to conduct provisional voting for:
  - Vote-by-Mail Voter who does not have VBM ballot; or,
  - Voter not listed in Roster who declines redirection to home polling place or gives address within the precinct(s) that this polling place serves.
- **Street Index/Ballot Clerk** fills out top section of provisional envelope, removes envelope receipt, tells **Voter** receipt number can be used to check vote status.
- **Voter** fills out bottom section of provisional envelope (does **not** sign Roster).
- **Inspector** checks information on envelope is correct, clear, and complete.
- **Street Index/Ballot Clerk** says “You will receive a paper ballot unless you request the accessible voting machine.”
- **Voter** uses pink envelope for secrecy (does **not** receive blue secrecy sleeve).
- **Street Index/Ballot Clerk** states required information and hands **Voter** receipt stub, ballot, and ballot pen.
- **Voter** marks ballot, seals it in envelope, inserts into Red Box, and returns pen.

#### *If provisional Voter requests accessible machine*

- **Touchscreen mode:**
  - **Inspector** activates voter card, writes provisional ID number given by activator on envelope, inserts sealed (empty) envelope into Red Box, and gives card to **Voter** with offer to assist.
  - **Voter** inserts card into Edge, uses machine to mark ballot, confirms vote via paper print-out, casts vote, and returns card to pollworker.
- **Audio mode:**
  - **Inspector** calls the Election Center for instructions.

# Voting Procedures Job Card 1 : Roster Clerk

## Standard procedures

1. Greet Voter. Ask Voter for name and address.
2. Find name and address in Roster. (Check white/purple/green pages.)
3. Check there is no note under Voter's name.
4. Fill in bubble next to signature line. Ask Voter to sign on signature line next to name.
5. Hand Voter a blue secrecy sleeve. Say: *You will be issued a paper ballot unless you request the accessible voting machine.*  
  
(If Voter requests the accessible machine, ask Inspector to assist.)

## What if...?

...VBM Ballot Issued is under Voter's name

### Voter wants to drop off voted ballot

- Ask Voter to check envelope signed/sealed, then direct Voter to insert envelope in Red Box. Voter does **not** sign Roster.

### Voter wants to vote at home polling place

- If Voter **has** VBM ballot:
  - Check Voter is listed in Roster. [*If not see*]
  - Ask Voter to seal ballot in its envelope.
  - Write *SURRENDERED* across envelope.
  - Put surrendered envelope in Red Box.
  - Go to Step 4, standard procedures.

### Voter does not have VBM ballot

- Ask Street Index/Ballot Clerk to conduct provisional voting for this reason.

...Voter's name not in Roster

- Say: *May we direct you to your home polling place, or would you prefer to vote provisionally here?*
- Ask Street Index/Ballot Clerk to redirect Voter to home polling place, or conduct provisional voting.

...Voter asks about accessible machine

Say: *The machine has touchscreen and audio ballots in English, Cantonese, Mandarin, and Spanish. The touchscreen has a large-print option. For the audio ballot, there is a headset to listen to the ballot and a keypad with shaped, colored and Braille-coded keys to make selections. You may request a sip-and-puff device to attach to the keypad, or a headpointer for use with the touchscreen.*

## **Voting Procedures Job Card 2** : Street Index/Ballot Clerk

### **Standard procedures**

1. Listen when Roster Clerk asks for Voter's name and address.
2. Find Voter on Table Street Index. Check Voter's name off. (Once an hour until 6:00 pm, "~~mark through~~" checked names on Posted and Table Street Indexes.)
3. **While the Voter watches:**  
Tear receipt stub and ballot from each pad. Give with ballot-marking pen to Voter. Say:
  - *The ballot is printed on both sides of this card.*
  - *Please return the pen after voting.*

### **What if...?**

#### ...Voter must vote provisionally

- Complete top pollworker section on provisional envelope. Remember to write in precinct number, and remove receipt from envelope and give to Voter.
- Ask Voter to complete bottom Voter section. Ask Inspector to double-check information in both sections is complete and legible.
- Remind Voter to **seal** the envelope containing their voted ballot before depositing it in the Red Box.

#### ...Voter is not at home polling place

- Use map and blue polling place list to direct Voter to home polling place.
- If Voter declines redirection, offer provisional voting.
- After **7:30 pm**, do not offer re-direction. Issue a provisional ballot.

#### ...Voter wants to replace ballot card

- Write SPOILED across returned card.
- Issue new receipt stub and card.
- Put spoiled card in the Red Box.
- If same Voter requests to spoil card again, say: *By law, this is the final copy I may issue to you. May I offer you any assistance?*

# Voting Procedures Job Card 3 : Insight Monitor

## Standard procedures

**A pollworker must stay with the machine at all times.**

1. For Voter's privacy, sit behind the Insight. Never look at or touch a marked ballot card.

Check Voter has blue secrecy sleeve. **Only Voters with a blue secrecy sleeve may insert their ballots into the machine.**

2. Say: *Please insert the card into the ballot slot and release quickly.*
3. Collect pen and secrecy sleeve, then offer an "I Voted" sticker. Say: *Thank you for voting!*

What if...?

...Voter does not have blue secrecy sleeve

- **Ballot only:** ask Voter if he or she has blue secrecy sleeve.
- **White envelope**=Vote-by-Mail (VBM) ballot. Voter may surrender ballot at election table or cast VBM ballot (To cast VBM ballot, Voter must seal ballot in envelope, sign envelope and insert it into the Red Box.)
- **Pink envelope**=Provisional ballot. Voter must seal ballot in provisional envelope and insert it into Red Box.

..Insight returns ballot & prints a **message**

- Say: *A message about your ballot is printed here [show tape].* Read explanation from "What Insight Messages Mean" tent card.
  - If Voter asks for new card: Voter takes card to election table to be spoiled and receive new card.
  - If Voter asks to cast ballot as-is: Press '3' key.

...the Insight prints an **error**

- Tell Inspector so that voting can continue using the Auxiliary Bin.
- Say to Voters: *Please insert your ballot into this secure bin.*
- Call the Election Center for instructions.

...the Insight **jams**

- Tell Inspector so that voting can continue using the Auxiliary Bin.
- Say to Voters: *Please insert your ballot into this secure bin.*
- Check Insight tape for one of these messages:

**\*\*\* BALLOT HAS BEEN PROCESSED!!! \*\*\*** or

**\*\*\* BALLOT HAS NOT BEEN PROCESSED!!! \*\*\***

Report message to Election Center to receive instructions.

# Overview of Closing Procedures

When voting is finished on Election Day, the Inspector will give each Clerk a closing job card that contains step-by-step instructions for one of the three closing jobs. Follow the job card to ensure the integrity of the election results and the security of the ballots.

For accurate efficiency, review this page and the closing job cards to see how the final hours of Election Day will run.

**8:00 pm** Inspector announces outside the polling place: *The polls are now closed!*

- Any Voter in line at 8:00 pm has the right to vote.
- When final Voter departs, Inspector assigns Closing tasks.

## 1<sup>st</sup> Pick-up: Inspector prepares (with one Clerk) and transfers...

- Signed Insight tape
- Insight memory pack
- Edge results cartridge

to Department of Parking & Traffic (DPT) Officer. Both document transfer by signing Custody Transfer Form (CTF).

## 2<sup>nd</sup> pick-up: Clerks prepare election materials...

- Unused ballots
- Insight ballots
- Red Box ballots and materials
- Roster

and record numbers on Clerk Closing Cards.

Inspector prepares for 2<sup>nd</sup> pick-up and fills out paperwork using Clerk Closing Cards.

Clerks pack supplies and clean polling place.

Inspector posts copy of:

- Insight tape
- Posted Ballot Statement

All pollworkers sign Posted Ballot Statement Certification (back cover of Roster) and closing seals. Pollworkers apply signed seals to Closing Bags #1-9.

## 2<sup>nd</sup> Pick-up: Inspector transfers...

- Unused ballots sealed in Rice Bag
- Election materials sealed in Closing Bags #1-9
- Edge printer in black bag

to Deputy Sheriff. Both document transfer by signing Custody Transfer Form (CTF).

- **Student** Clerks leave by 9:00 pm.
- All **Adult** Clerks stay at polling place until 2<sup>nd</sup> pick-up is complete to maintain custody of ballots.

Inspector calls FED to report pick-ups completed.

# Closing Job Card 1

## Part 1: Unused Ballots

**Inspector: give this Clerk Closing Bags 1,2,3**



① 5 # of ballot cards on election table

+



② 50 # of ballot cards in Inspector Rice Bag

+



③ 200 # of ballot cards in FED Rice Bag

=

255 TOTAL unused precinct ballot cards

④ Add Steps 1-3 and record

**INSPECTOR:** Copy into Posted Ballot Statement Box D

⑤ Generic Ballots are issued only in emergencies. If you have generics, count separately and record

Generic Ballots

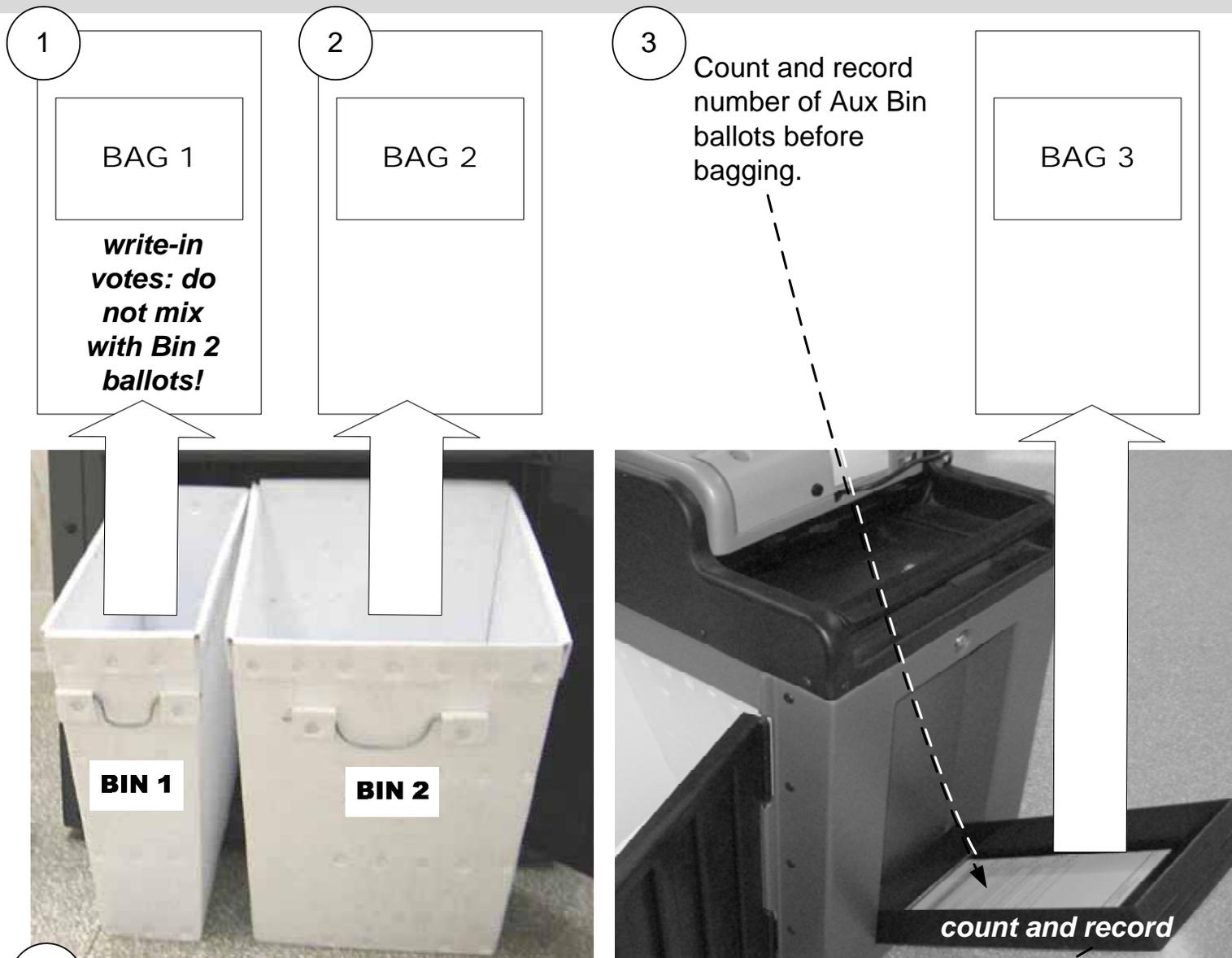
**INSPECTOR:** Copy into Posted Ballot Statement Box Dx

0 TOTAL unused generic cards  
*(if no generic ballots, write '0')*



⑥ With Inspector, place all ballot cards and boxes in **one** Rice Bag. Sign large paper seal and seal zipper.

## Part 2: Insight Ballots



4 Remove strip from top flap and seal bags. Place bags on election table.

5 Give this card to Inspector. Ask for clean-up task.

**INSPECTOR:** Copy to Posted Ballot Statement Box E

3 # of ballot cards in Aux Bin  
(if Aux Bin is empty, write '0')

**INSPECTOR**

When you have copied the 3 numbers from this card onto the Posted Ballot Statement, place this card in Closing Bag #9. **Remember to seal all unused ballots in one Rice Bag.**

# Closing Job Card 2: Red Box Materials

**Inspector: give this Clerk Closing Bags 4,5,6 and 7**

1

BAG 4

stapled ballot pad stubs

2 # of SPOILED cards

**INSPECTOR:** Copy to Posted Ballot Statement Box F

2

BAG 5

10 # of provisional envelopes with BLANK "Edge Provisional Ballot" Section

**INSPECTOR:** Copy to Posted Ballot Statement Box G

3

completed voter registration cards, translated materials request forms

0 # of provisional envelopes with FILLED-IN "Edge Provisional Ballot" Section

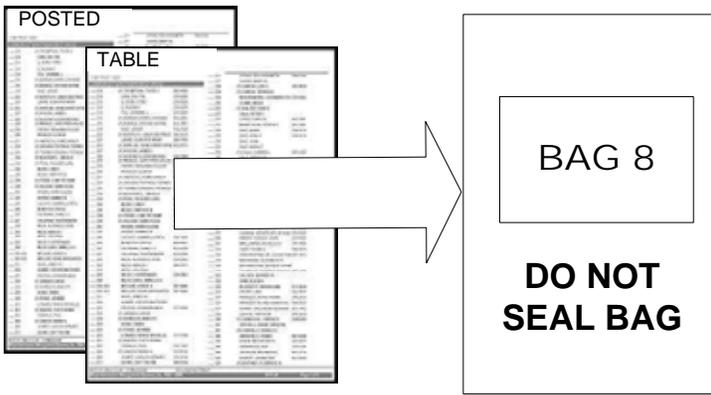
**INSPECTOR:** Copy to Posted Ballot Statement Box I



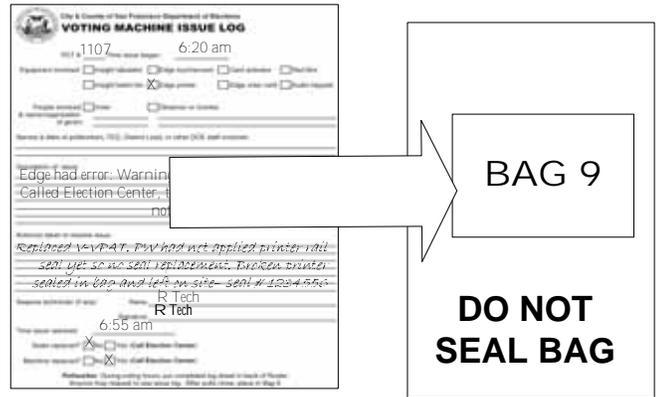
# Closing Job Card 3: Paperwork and Roster Signatures

**Inspector: give this Clerk Closing Bags 8 and 9**

1 Table and Posted copies of Street Index



2 Completed Voting Machine Issue Logs



Remove A-Z tabs from bottom of Roster pages

TEST STATEWIDE SPECIAL ELECTION		Roster of Active Voters		Election Date
CITY & COUNTY OF SAN FRANCISCO				8/11/09
MAY 19, 2009				5/19/2009
583 ATHENS ST	ADEN RICHARD ALLEN S	<input checked="" type="checkbox"/>	RAS Aden	[Barcode]
501 MUNICH ST	ALLEN, ANGELA	<input checked="" type="checkbox"/>	Angela Allen	[Barcode]
1309 RUSSIA AVE	AMIR, ROBIN <i>VBM Ballot Issued</i>	<input type="checkbox"/>		[Barcode]
1309 RUSSIA AVE	AMIR, ANTHONY	<input checked="" type="checkbox"/>	Anthony Amir	[Barcode]
1309 RUSSIA AVE	AMIR, KAREN MICHKO	<input type="checkbox"/>		[Barcode]
1309 RUSSIA AVE	AMIR, TIFFANY JILL	<input type="checkbox"/>	T J Amir	[Barcode]
629 MUNICH ST	AYE, MARVIN	<input type="checkbox"/>		[Barcode]
536 ATHENS ST	BAGLIO, ERNESTO Vote-by-Mail Ballot Issued	<input checked="" type="checkbox"/>	Ernesto B asilio	[Barcode]
270 ATHENS ST	BAKTER, JOHNNY A Vote-by-Mail Ballot Issued	<input type="checkbox"/>		[Barcode]
1431 BRAZL AVE	BAYAT, DANIEL BRIAN	<input checked="" type="checkbox"/>	Daniel B rian B ayat	[Barcode]

Number of Signatures on this Page: **6**

4 On each Roster page, check there is a filled-in **bubble** next to each **signature**. If a bubble next to a signature is blank, fill it in.

5 Count and write number of signatures in box on each white, purple and green page. Write "0" if no voters signed that page.

6 Add up and record total number of signatures from Roster.

7 Open Roster to back pages ("Posted Ballot Statement"). Give to Inspector with this card. Ask for clean-up task.

**INSPECTOR:** Copy into Posted Ballot Statement Box L

130 # of signatures in Roster

**INSPECTOR**

Place this card in Closing Bag #9. Complete the PBS. All Pollworker sign Certification (back cover of Roster). Remove YELLOW copy of PBS. Place Roster in Bag #8 and seal top flap.



*Call Election Center immediately for instructions and support if:*

- the polling place is locked at 6:00 am;
- voting machines are not working or are unavailable; and/or,
- key materials (ballots, Roster, provisional envelopes) are missing

6:00 am – 7:00 am Opening and Setting Up:

Part 1: Inspector assigns Clerks tasks (10 minutes)

Part 2: Inspector and Clerk verify security and set up voting machines (30 minutes)

Part 3: Inspector administers Oath of Office and completes final preparation (10 minutes)

Part 4: Inspector declares polls open at exactly 7:00 am

Part 1: Assign Clerks Tasks

Hand out from Inspector Folder:

- parking permits
- nametags and pollworker pins
- green Opening Job Cards and

with Card 2: Roster of Voters  
Table Copy of Street Index  
Blue polling place list  
City-wide precinct map

with Card 3: Posted Copy of Street Index  
Blue laminated Accessible sign (if provided)

Direct set-up of polling place. Follow Special Instructions Sheet if given in the Inspector Folder, and meet these layout requirements:

- Post all signs to direct all Voters to use the accessible entrance.
- Create clear, wide path to election table, seated booth, and both Insight and Edge voting machines.
- Place Insight, Edge, and Red Box where they are visible to Voters and within reach of a pollworker.
- Create smooth flow: entrance→election table→booth/voting machine→exit.
- Tape down all cords.

Part 2: Verify security and set up voting machines

- When setting up the voting machines, **only the Inspector** may unseal, unlock or turn on machines. These steps are **highlighted in gray**. All other steps must be completed by the Inspector and one Clerk.
- Plastic security seals are color coded:  
**Green=GO** ahead, break at opening; **Yellow=WAIT**, break at closing;  
**Red=STOP**, **never** break!

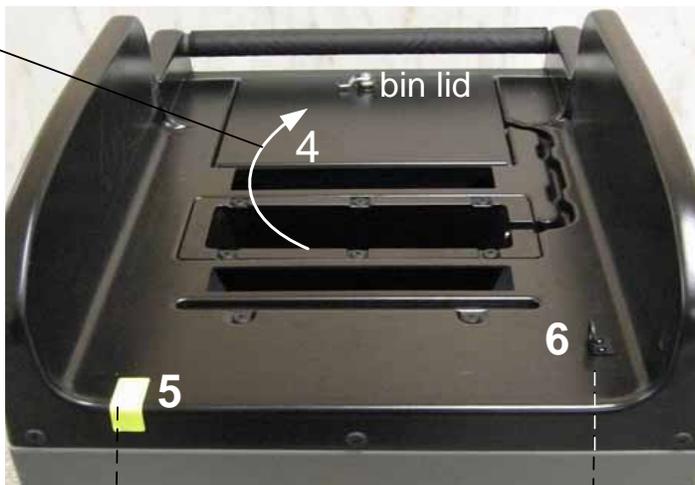
## Insight

- ❑ 1. Check green plastic security seal on Insight black bag is **intact** and **serial # matches** Box (A):

(A) Insight black bag green seal serial #

**123456**

- ❑ 2. Break green seal and place in **Closing Bag #9**.
- ❑ 3. Open bag and take out Insight tabulator.
- ❑ 4. Unlock and flip open bin lid (keys in Inspector Folder).



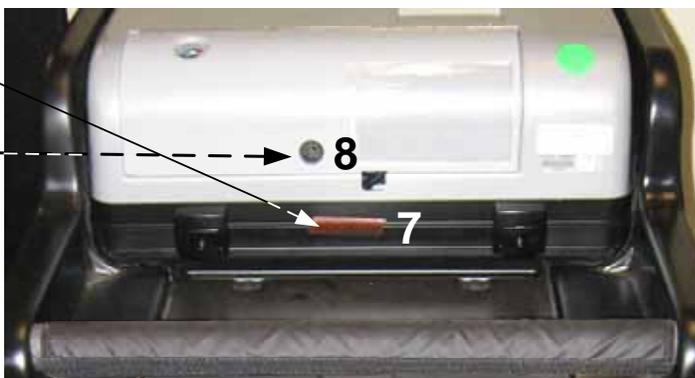
- ❑ 5. Set Insight tabulator on bin so neon sticker on front of bin lines up with neon sticker on front of tabulator.



- ❑ 6. Make sure slot on bottom of tabulator fits into metal tab on top of bin.

- ❑ 7. On back of tabulator, check orange sticker seal is **intact**.

- ❑ 8. Unlock and open control panel with round key (turn to left).



# Insight



- 9. Push power cord into socket to make sure the cord is fully connected.
- 10. Plug other end of power cord into wall or extension cord.
- 11. Check yellow plastic seal on memory pack door is **intact** and **serial # matches** Box (B):

(B) Memory pack door yellow plastic seal serial #

**234567**

- 12. Close and lock control panel (turn key to right).
- 13. Check LED counter and paper tape shows all zeros (0000).
- 14. Sign bottom of the tape. Roll and paperclip tape.
- 15. Check orange sticker seal on bin door is intact.
- 16. Remove sticker and affix here:

*seal from Insight bin door*

- 17. Unlock top and bottom locks on bin door.
- 18. Remove Edge Printer, Audio Keypad, and Card Activator from Bin 1.
- 19. Check Bin 1 and Bin 2 are empty.
- 20. Re-lock top and bottom locks on side bin door. Unlock Aux Bin (in back).
- 21. With Clerk, check Aux Bin is empty.
- 22. Re-lock Aux Bin.
- 23. Place "I voted!" stickers and blue Insight Messages tent card on Insight.



## Edge

- ❑ 1. Check blue plastic seal on Edge blue bag is **intact** and **serial # matches** Box (C):

(C) Edge blue bag blue plastic seal serial #

**1234567**

- ❑ 2. Break seal, place in **Closing Bag #9**.
- ❑ 3. Remove Edge from bag and set on long blue or square white table.
- ❑ 4. Check machine ID (number printed in large white numbers on blue case near both handles) **matches** Box (D):

(D) Edge Machine ID #

**52554**



- ❑ 5. Remove case lid. Take power cord from inside lid. Plug into AC IN port on Edge and power source. Check green AC POWER light comes on.
- ❑ 6. Take printer out of its black bag.
- ❑ 7. Check red plastic seal on side of printer is **intact** and **serial # matches** Box (E):

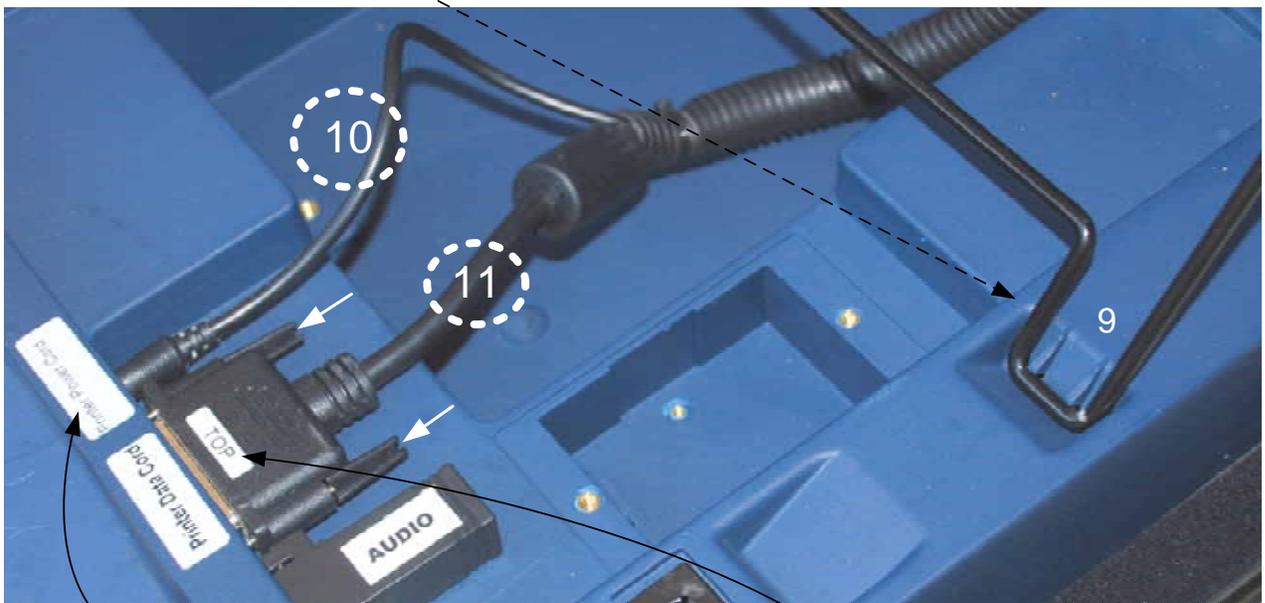
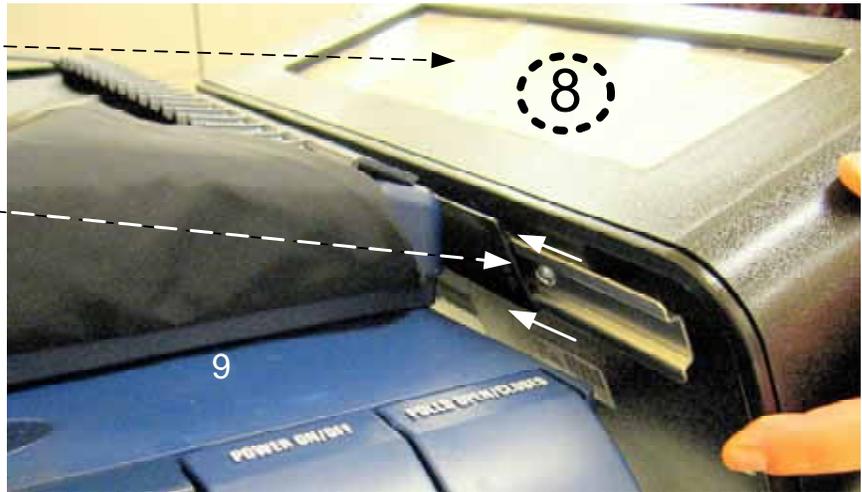
(E) Printer red plastic seal serial #

**345678**



## Edge

- ❑ 8. Face the printer screen up. Slide both edges of silver printer rail inside the end of black Edge rail brackets.
- ❑ 9. Lift touchscreen fully upright. Fit metal support stand into notches near base of screen.



- ❑ 10. Plug small cord into "Printer Power Cord" port.
- ❑ 11. Plug large cord (with "top" sticker facing up) into Edge "Printer Data Cord" port. Tighten screws.
- ❑ 12. Before turning on the Edge, check the privacy panels are open and nothing is touching the touchscreen.
- ❑ 13. Lift up the unsealed, green-labeled POWER ON/OFF door and turn knob to ON. LED Screen shows squares or *Election Verify*, then reads: *Please Wait*.
- ❑ 14. Check top curtain is attached to both privacy panels. Check "Touchscreen Voting Instructions" are inside right-hand panel.
- ❑ 15. Remove privacy curtain from inside left panel. Attach to Velcro tabs on outside left panel and printer so only Voter will be able to see print-out.

The touchscreen going **dark/blank** for 20-30 seconds during start-up is **normal**.



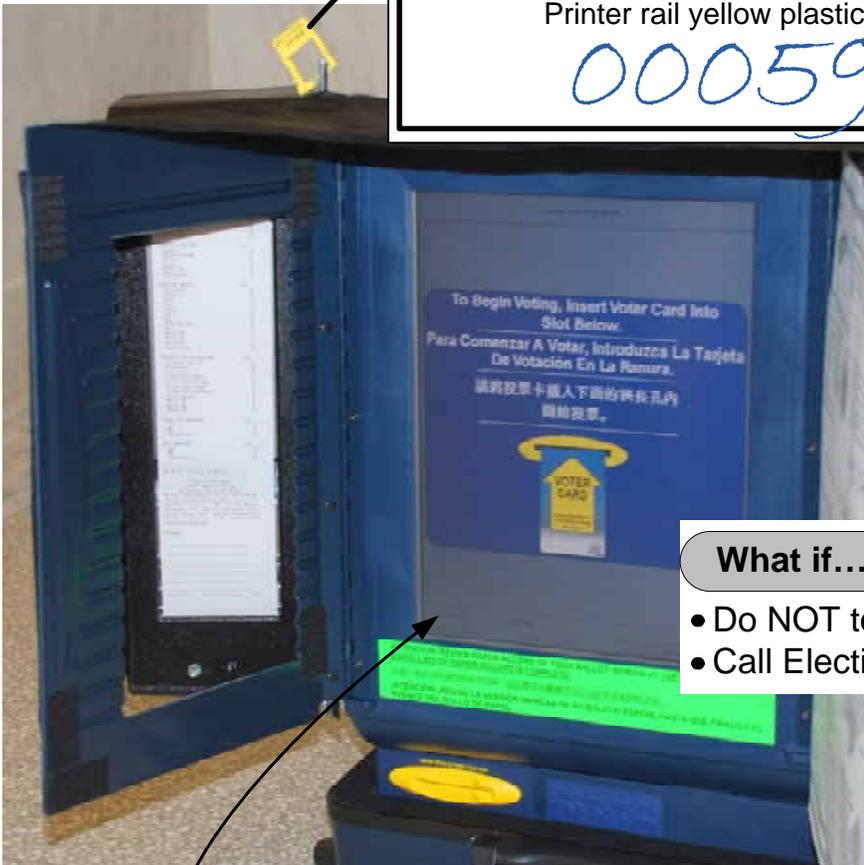
- 18. Seal POLLS/OPEN CLOSED door with yellow plastic seal from Supply Pack. Record serial #:



Polls Open/Closed door yellow plastic seal serial #:  
0003411

**Inspector:  
fill this in!**

- 19. Seal top of printer rail with yellow plastic seal from Supply Pack. Record serial #:



Printer rail yellow plastic seal serial #:  
0005938

**Inspector:  
fill this in!**

**What if... screen does NOT look like this?**

- Do NOT touch POLLS OPEN/CLOSED switch.
- Call Election Center.

- 20. Check touchscreen has blue "To Begin Voting" screen. Check PUBLIC counter shows zero votes cast.

## Card Activator and Audio Keypad

- 1. Check 2 silver sticker seals on bottom of Card Activator are **intact**.
- 2. Check red-dot sticker seal over cartridge port on right side of Card Activator is **intact**.
- 3. Turn Card Activator on. After 5-20 seconds, green “Ready” light comes on above LED screen which reads: *Please Insert Voter Card*. **Switch machine off**. Only switch back on to activate a card at Voter’s request.
- 4. Check voter cards and Edge Instructions booklet are in bag.
- 5. Put Card Activator (SWITCHED OFF) back in its black bag. Place behind election table.
- 6. Place Audio Keypad (in smallest black bag) with Card Activator. Connect keypad to Edge **only** for audio ballots.



### What if... Card Activator does not start up correctly?

- Call Election Center.

### Part 3: Administer Oath of Office and complete final preparation

- All pollworkers take Oath and sign Declaration of Pollworkers (inside the front of the Roster cover).
- Check Red Box is empty. All pollworkers sign 2 white paper seals. Seal Red Box.
- Set yellow “Attention! Vote-by-Mail and Provisional Voters” tent card on Red Box.
- Record the ONE pollworker (you or adult Clerk) on Payroll Sheet (Inspector Folder) who volunteers cell phone for polling place use. Give number to FED.
- All pollworkers check, update if necessary, and sign Payroll Sheet. If Clerk is missing, check Precinct Staffing and Bilingual Requirement Form (Inspector Folder) for bilingual pollworker requirements. If minimum not met, call Election Center.
- Give Clerks blue Voting Procedures Job Cards (Inspector Folder).

### Part 4: Declare the polls open at exactly 7:00 am

- Go outside & announce: *The polls are now open!*
- When the **first** ballot card is accepted, Insight prints “First ballot read” and the time (to document when voting began). After the first ballot, the Insight does **not** print messages for ballots it accepts, but the red LED counter will advance.

## 7:00 am – 8:00 pm Voting Procedures

Inspector supervises Clerks as Precinct Team processes and assists Voters

### Check materials and voting equipment

- Voting machine and Red Box seals are intact.
- Required materials are on election table and in Voter Information Kiosk pockets.
- Ballot and provisional envelope supplies are sufficient. (FED will deliver additional ballots. Remember to sign Custody Transfer Form in Inspector Folder.)
- Nametags on all pollworkers are clearly visible and identify bilingual pollworkers.
- “What Insight Messages Mean” stand is displayed on Insight.

### Supervise Clerks (and fill position when Clerk is on break)

*If you leave the polling place to go on break, leave the voting machine keys with a Clerk!*

#### **Roster Clerk...**

- checks all pages of Roster and processes Voters correctly.
- hands blue secrecy sleeve only to Voters who sign Roster.
- informs Voter paper ballot will be issued unless accessible machine requested.
- offers choice of redirection or provisional voting to Voter not in Roster.

#### **Street Index & Ballot Clerk...**

- marks Voters off Table and Posted Street Indexes.
- tears receipt stub and ballot from the pad in front of Voter.
- hands Voter a ballot-marking pen and states information.
- correctly assists provisional Voters (and asks Inspector to check envelope).

#### **Insight Monitor...**

- never leaves machine unsupervised.
- allows only Voters with blue secrecy sleeves to use Insight.
- never touches or looks at ballot nor asks Voters how they voted.
- offers to explain printed Insight message if a ballot is returned.
- only presses ‘3’ key to accept ballot upon Voter request.

### Offer Edge Voters assistance and protect privacy

- **Touchscreen** instructions on Edge’s right-hand privacy panel
  - **Voter card activation** and **audio** instructions in Card Activator bag
  - **Braille** audio instructions in Voter Information Kiosk pocket
  - Call Election Center for more assistance, or if sip/puff or head-pointer needed.
- If one vote is cast on the Edge, the Secretary of State requires at least four more Voters to voluntarily cast their votes on the Edge to protect privacy. After one Edge vote is cast, have Roster Clerk say to Voters until four more votes are cast:

*Would you like to receive a paper ballot or use the accessible voting machine to cast your vote?*

When the public counter reads “5”, have Clerks return to issuing paper ballots unless Voter specifically requests the accessible machine.

*(checklist continues next page)*

## Check no electioneering is occurring at or within 100 feet of the polling place

Voters have the right to cast a secret ballot *free from intimidation*. If instructions to stop electioneering are not followed, remain polite. Call the Election Center.

- ❑ Check for signs within 100 feet of the entrance to the voting room or area.  
Remove or cover if possible, or call FED with content and location.

- ❑ Check for campaign staff or volunteers within 100 feet of voting room or area.  
Call Election Center so campaign can be advised of issue. Then ask person(s) to relocate. Sample statement:

*Hello, my name is X and I'm the Inspector for Precinct X. I'd like to remind you that California Elections Code Section 18370 states that no one may visibly or audibly advocate for or against any candidate or measure on the ballot within 100 feet of a room where voting is taking place. We posted signs at the 100-foot boundary and I'd be happy to show you where those are.*

- ❑ Be alert for conversations, clothing, or materials inside the polling place.

Voters may have materials in the booth, but may not display or discuss these outside the booth. Sample statement:

*Hello, my name is X and I'm the Inspector for Precinct X. I'd like to remind you that no electioneering is permitted at polling places. Please:*

- *hold that thought / take off your button / cover your shirt until you are 100 feet away from the entrance to this room; or,*
- *put away any election materials until you are in the voting booth. Please take the materials with you when you exit the booth.*

## What if...

### ...voting equipment has an issue

- If paper ballot jams: call Election Center immediately **before trying to clear it**.
- If Insight cannot process ballots for any reason, continue voting via the Aux Bin.
- Call FED and Election Center for assistance. Fill out a Voting Machine Issue Log (Inspector Folder).
- If a Technician is sent, ask to see his or her yellow or green staff badge before giving access to the voting machines. Tech must fill out section of Voting Machine Issue Log clearly stating what actions were taken to resolve issue.
- If Edge printer is replaced, Tech must provide red plastic seal to seal broken printer in its black bag. Place sealed bag in Rice Bag for Deputy Sheriff pick-up.

### ...Voter requests assistance marking a ballot

- Voters unable to vote without assistance may bring one or two persons into the booth to assist them, or they may request assistance from a pollworker.
- If a ballot is marked for a Voter, fill out the Assisted Voters List (front of Roster).

**...Voter cannot enter the polling place  
(inaccessible location or voter has limited mobility)**

Provide curbside voting:

- **Roster Clerk** and **Inspector** take the Roster outside for **Voter** to sign.
- **Roster Clerk** brings Roster back into the polling place.
- **Street Index/Ballot Clerk** checks Voter's name off Table Street Index.
- **Inspector** takes ballot-marking pen, receipt stub, ballot, and secrecy sleeve to **Voter**, who marks ballot, places in secrecy sleeve, gives it and pen to **Inspector**.
- **Inspector** asks **Voter** if she or he wants to wait for any Insight messages and/or to confirm that the ballot is accepted.
- Never look at the ballot without **Voter's** permission.

**...Voters have children with them**

- Parents may take children under the age of 18 into the voting booth with them.

**...Voter is talking on mobile phone**

- Any activity that disturbs Voters or disrupts voting must stop.
- If Voter is discussing items on ballot, it is electioneering. See previous page.

**...Polling place owner or representative wants to move location, close within voting hours or close before all election materials are picked up**

- Politely say the Department of Elections must be contacted before taking any action. Do not relocate or leave. Call the Election Center.

**...observers or media are at the polling place**

- Only allow Voters and those assisting Voters in the voting booth area.
- Answer questions covered in the Pollworker Manual and allow observers in the polling place as long as voting is not disrupted.
- Direct all other questions and any media inquiries to Voter Assistance Hotline.
- News media or pollsters may be within 25 feet of a polling place, and may speak to Voters leaving the site as long as they do not interrupt voting.
- Do not allow filming/photographing of voters without their permission (and never allow a ballot to be filmed/photographed).

**...all other issues**

- Call the Election Center. You are *required* to get instructions from the Department for any situation not covered in the polling place or pollworker materials, and you must ask for assistance if any instructions are not clear.

# 8:00 pm – 11:00 pm Closing Procedures

Note: Each of the following must be completed but order may vary depending on pick-up times

- Part 1:** Close polls, assign Clerks tasks, and secure unvoted ballots
- Part 2:** Prepare and transfer custody of election data (1<sup>st</sup> pick-up)
- Part 3:** Prepare printer for 2<sup>nd</sup> pick-up and all other machines for secure storage
- Part 4:** Complete and post yellow copy of Posted Ballot Statement
- Part 5:** Prepare and transfer custody of election materials (2<sup>nd</sup> Pick-up)
- Part 6:** Re-pack all supplies and return polling place to pre-Election Day set-up

## Part 1: Close Polls, Assign Clerks Tasks, and Secure Unvoted Ballots

- At 8:00 pm, go outside and announce: *The polls are now closed!* Serve all Voters who are in line at 8:00 pm.
- Send a Clerk to the back of the line to tell late arrivals: *State law does not allow anyone who arrives **after** 8:00 pm to vote.*
- After last Voter leaves, give Clerks yellow Closing Job Cards and Closing Bags.
- Unlock the Insight bin door and the Aux Bin. Break the seals on the Red Box.
- When Clerk completes Closing Card 1, sign large white paper seal with Clerk and seal all unused ballots and white cardboard boxes in **one** Rice Bag.

## Part 2: Prepare and transfer custody of Edge & Insight election data (1<sup>st</sup> Pick-up)

### Edge

- 1. Record Edge **Public Counter** number on Custody Transfer Form (Inspector Folder) and Posted Ballot Statement (back of Roster):



**If Public Counter = 0  
It is still necessary to document that no votes were cast, close the polls, and print the closing report!**

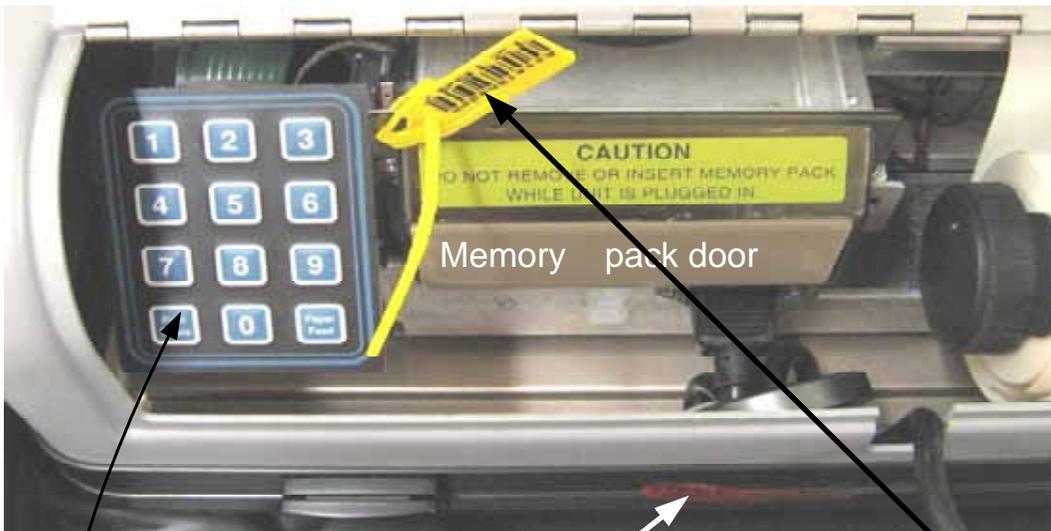




- ❑ 1. Write number from LED counter on Posted Ballot Statement Part 2, Line C :

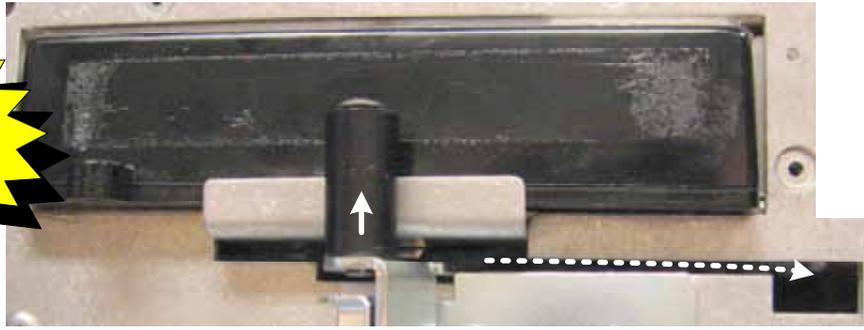
City & County of San Francisco Department of Elections		PCT	1107
<b>POSTED BALLOT STATEMENT</b>			
November 3, 2009 Municipal Election			
<b>PART 1: NUMBER OF BALLOT CARDS RECEIVED</b>			
A	Precinct ballot cards picked up pre E-Day		200
B	Precinct ballot cards delivered by FED on E-Day		200
Be	Number of generic ballot cards delivered on Election Day <small>(all only have generic if brought by replacement inspector or if FED made last delivery)</small>		0
total:		Total ballot cards received	400
<b>PART 2: NUMBER OF BALLOT CARDS RETURNED</b>			
			0
			0
			0

Part 2, Line C



- ❑ 2. Check orange sticker seal is intact.
- ❑ 3. Unlock and open control panel. Check yellow seal on memory pack door is intact.
- ❑ 4. Print all-day tape using keypad:
  - press “Print Totals” key, then “0” (zero) to print vote totals.
  - then press “9-9-9-9” to print audit log.
  - press “Paper Feed” key to advance 6 inches of blank tape.
  - leave an inch of tape sticking out of machine when tearing off tape.
- ❑ 5. Inspector and all Clerks sign the all-day tape. Place with Pink Bubble Bag.
- ❑ 6. Press “Print Totals” again to print 2<sup>nd</sup> report. Tear off and keep to post outside polling place with Posted Ballot Statement.
- ❑ 7. **Unplug machine!**
- ❑ 8. Break yellow seal on memory pack door, place in **Closing Bag #9**.

**If machine beeps, close door! You skipped Step 7!**



- 9. Open memory pack door. Push black post up slightly (about 1/8<sup>th</sup> inch) and slide to far right. Remove memory pack and place in Pink Bubble Bag. Congratulations! You have prepared all materials for 1<sup>st</sup> pick-up:



❑ Pink bubble bag and small paper seal (inside bag)

❑ Insight memory pack

❑ Insight signed all-day tape

❑ Edge results cartridge

**When the DPT Officer arrives:**

- ❑ Transfer items shown above by signing Custody Transfer Form Part 3 Lines B-D with the DPT Officer.
- ❑ Give Officer bottom copy of Custody Transfer Form.
- ❑ Place items in Pink Bubble Bag. Sign small paper seal with DPT Officer. Seal Pink Bubble Bag.
- ❑ DPT Officer takes sealed Pink Bubble Bag.

City & County of San Francisco Department of Elections  
**CUSTODY TRANSFER FORM**  
 November 3, 2009 Municipal Election

PCT 1107

<b>Part 1: Ballots (Department of Elections to Inspector)</b>	Inspector	DOE
CARD 1	200	
<b>Part 2: Ballots (Field Election Deputy to Inspector)</b>	Inspector	FED
CARD 1	200	
<b>Part 2X: Supplemental Generic Ballots (Field Election Deputy to Inspector if needed)</b>	Inspector	FED
CARD 1		
<b>Part 3: Data (Inspector to Department of Parking &amp; Traffic Officer)</b>	Inspector	DPT
Part 3, Line B, C & D		
<b>Part 4: Ballot &amp; Materials (Inspector to Deputy Sheriff)</b>	Inspector	DS
Check (Do not take): Insight bins (1, 2 & Auxiliary) are empty. Red Box is empty.		
Take:		
A. Unvoted ballots in boxes	No. of boxes:	
B. Bag 1: Ballots from Bin 1		
C. Bag 2: Ballots from Bin 2		
D. Bag 3: Ballots from Auxiliary Bin		
E. Bag 4: Spoiled ballots, ballot pad stubs		
F. Bag 5: Provisional envelopes, voter registration cards		
G. Bag 6: Voted Vote-by-Mail envelopes		
H. Bag 7: Surrendered Vote-by-Mail envelopes		
I. Bag 8: Roster, Table & Posted copies of Street Index		
J. Bag 9: Inspector Workbook, Voting Machine Issue Log sheets, broken plastic seals		

**Part 3:** Prepare voting machines for pick-up (Edge printer) or secure storage (all others)

**Edge Printer: NEVER BREAK RED SEAL**

- 1. Take curtain off printer and re-attach to inside left-hand panel of Edge.
- 2. Disconnect power and data printer cords from Edge.
- 3. Break yellow plastic seal on printer rail. Place seal in **Closing Bag #9**.
- 4. Slide printer off Edge. Set on election table in its black bag for 2<sup>nd</sup> pick-up.

**Edge**

- 1. Tuck Edge power cord under flap inside Edge case lid.
- 2. Lower touchscreen. Put case lid on Edge and latch.
- 3. Place Edge in its blue bag. Pull zipper tab to the end of the zipper.
- 4. Fit zipper tab into grooves and push flat.
- 5. Seal blue bag with the blue plastic seal from Supply Pack. Record serial #:



Edge blue bag blue plastic seal serial #:

1186847

**Inspector:  
fill this in!**

**Insight**

- 1. Slide post back to center to close memory pack door.
- 2. Place plug (not entire cord) inside control panel compartment. Lock door.
- 3. With Clerk, lift Insight machine off bins and zip inside black bag.
- 4. Seal zipper with plastic seal from Supply Pack. Record seal serial #:

Insight black bag plastic seal serial #:

789012

**Inspector:  
fill this in!**

**Card Activator & Audio Keypad**

- 1. Check Card Activator is **TURNED OFF** and **UNPLUGGED** (green, red lights OFF). Place Card Activator, power cord, and voter cards in black bag.
- 2. Place Audio Keypad in black bag.
- 3. Place bags next to empty Insights bins.



**Part 4:** Complete and post the Posted Ballot Statement with Insight tape

San Francisco's City Charter (SEC. 13.107.5) states that after the polls close, each precinct team must post the total number of ballots *given* to that precinct and the number of voted ballots, unused ballots, spoiled ballots, cancelled ballots, vote-by-mail ballots and provisional ballots *returned* by the precinct team, as well as a computer record [the Insight tape] showing the number of ballots cast for each candidate and for or against each ballot measure.

Look for **Inspector:** arrows on left side of each closing card for directions.

**As Clerks hand in closing cards, assign clean-up tasks (Part 6)**

**Check both sides of each closing card!**

**Closing Job Card 3: Paperwork and Roster Signatures**  
Inspector give this Clerk Closing Bags 8 and 9

**Closing Job Card 2: Red Box Materials**  
Inspector give this Clerk Closing Bags 4,5,6 and 7

**Closing Job Card 1 Part 1: Unused Ballots**  
Inspector give this Clerk Closing Bags 1,2,3

① 7 # of ballot cards on election table

② 50 # of ballot cards in Inspector Rice Bag

③ 200 # of ballot cards in FED Rice Bag

257 TOTAL unused precinct ballot cards

INSPECTOR: Copy into Posted Ballot Statement Box D

④ Add Steps 1-3 and record

**Generic Ballots**

⑤ Generic Ballots are issued only in emergencies. If you have generic, count separately and record

INSPECTOR: Copy into Posted Ballot Statement Box Dx

⑥ 0 TOTAL unused generic cards (if no generic ballots, write 0)

⑥ With Inspector, place all ballot cards and boxes in one Rice Bag. Sign large paper seal and seal zipper.

City & County of San Francisco Department of Elections  
**POSTED BALLOT STATEMENT**  
November 3, 2009 Municipal Election PCT 1107

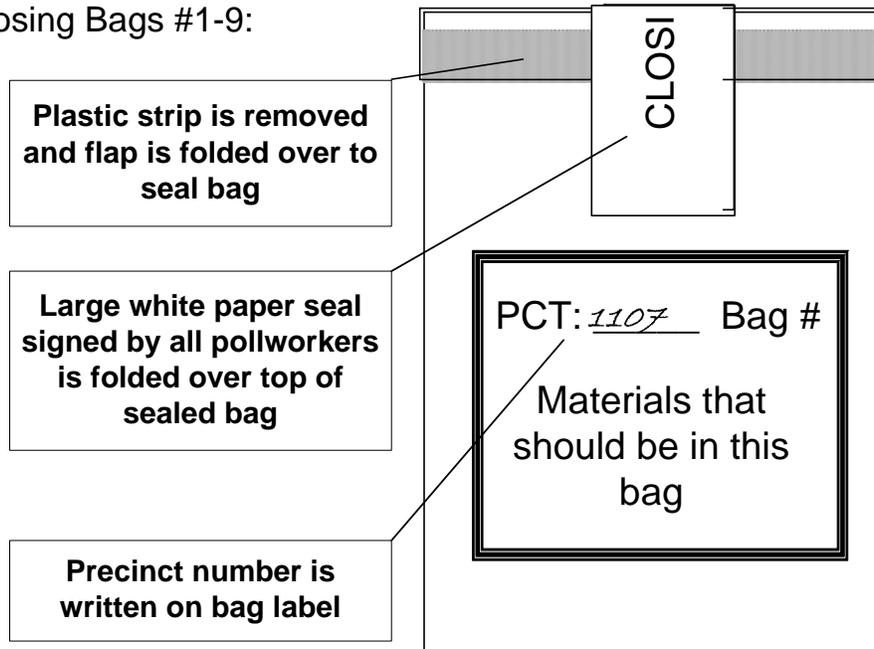
PART 1: NUMBER OF BALLOT CARDS RECEIVED		
A	Precinct ballot cards picked up pre E-Day	200
B	Precinct ballot cards delivered by FED on E-Day	200
Bx	Number of generic ballot cards delivered on Election Day <small>(will only have generics if brought by replacement inspector or if FED made 2nd delivery)</small>	0
TOTAL 1	Total ballot cards received	400
TOTAL 1		
PART 2: NUMBER OF BALLOT CARDS RETURNED		
C	Ballot cards counted by Insight (red LED counter)	128
D	Unused precinct ballot cards (Closing Card 1, side 1)	257
Dx	Unused generic ballot cards (if any) (Closing Card 1, side 1)	0
E	Ballot cards in Insight Auxiliary Bin (Closing Card 1, side 2)	E
F	Spoiled ballot cards (Closing Card 2, side 1)	F
G	Ballot cards cast provisionally (Closing Card 2, side 1)	G
TOTAL 2	Total ballot cards returned	C+D+Dx+E+F+G
TOTAL 2		
PART 3: RECONCILE BALLOT CARD COUNTS		
Is TOTAL 1 equal to TOTAL 2? Circle one:		YES NO
If no, describe any activity at the polling place that might affect ballot count:		
PART 4: EDGE VOTE COUNT		
H	Votes cast on Edge accessible machine (public counter)	H
I	Provisional votes cast on Edge (Closing Card 2, side 1)	I
PART 5: VOTE BY MAIL BALLOT COUNT		
J	Voted Vote-by-Mail envelopes (Closing Card 2, side 2)	J
K	Surrendered Vote-by-Mail envelopes (Closing Card 2, side 2)	K
PART 6: ROSTER SIGNATURE COUNT		
L	Signatures in Roster (Closing Card 3)	L

Inspector: Remove yellow copy to post outside polling place with Insight tape  
Post-Election Canvass: Take pink copy. Leave white copy in Roster

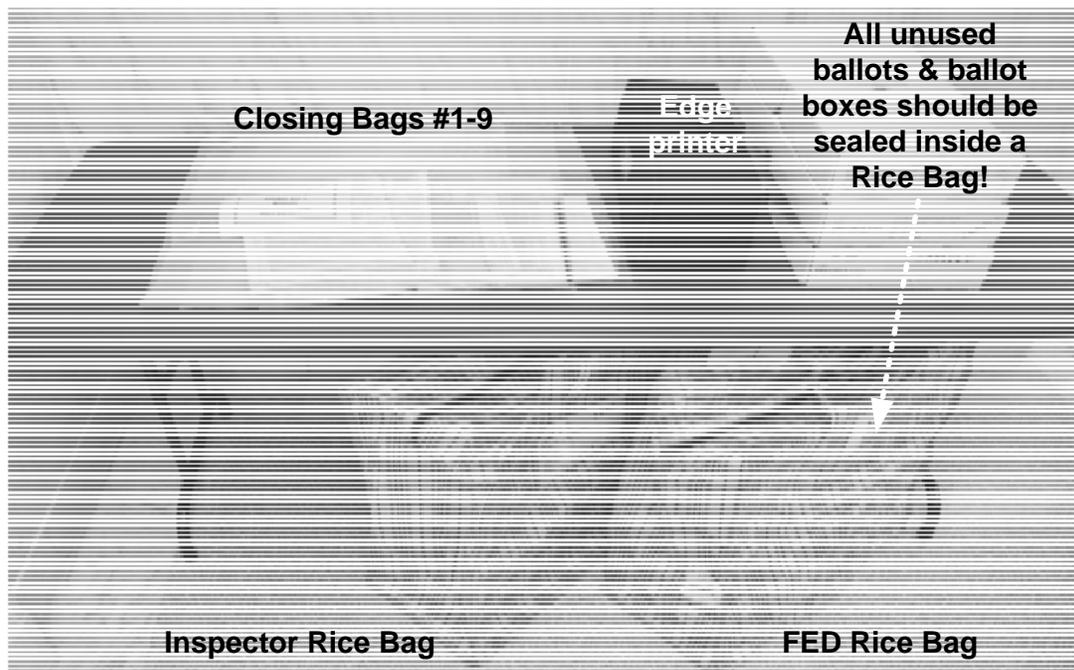
- All pollworkers sign the Posted Ballot Certification (back cover of Roster).
- Remove yellow copy of Posted Ballot Statement.
- Place Roster in **Closing Bag #8** and seal.
- Tape up the yellow copy of Posted Ballot Statement and Insight closing tape outside where they are visible from the street.

Part 5: Prepare and transfer custody of election materials (2<sup>nd</sup> pick-up)

- Check Insight bins are empty (Card Activator, Audio Keypad are next to bins).
- Check Red Box is empty (Pollworker supplies are next to Red Box).
- Have all pollworkers sign white paper seals.
- If you have not finished Part 4, do not seal Roster in Closing Bag until POSTED BALLOT STATEMENT is completed and yellow copy is removed.
- Remove final page** of this Inspector Workbook and place completed Inspector Workbook in Closing Bag #9 with all Closing Job Cards.
- Seal Closing Bags #1-9:



- Check materials are laid out in order of the Custody Transfer Form Part 4:



*Student Clerks may leave at 9:00 pm.  
All adults stay until Deputy Sheriff has completed pick-up.  
Assign any remaining tasks from Part 6.*



Be sure to remember on Election Day  
Friendly support is just a phone call away!

## ***Election Center*** (800) 554-9934

- Answers pollworker questions (from 5:30 am to final pick-up).
- Sends FEDs, District Leads, and Techs to assist at polling place.
- Delivers sip/puff device or headpointer for accessible voting machine.
- Responds to pollworker reports of tampering, fraud, etc.

## ***Voter Assistance***

***English*** (415) 554-4375

***Chinese*** (415) 554-4367

***Spanish*** (415) 554-4366

- Answers Voter questions.
- Translates between Voter & pollworker.
- Offers Voter directions to home polling place.
- Responds to Voter reports of tampering, fraud, etc.

## ***Emergency***

- For medical problems or life-threatening situations, first call 9-1-1.
- Evacuate polling place if necessary.
- Call the Election Center for instructions to continue voting.

### Questions **before** Election Day?

- Call (415) 554-4332 to speak with a Trainer;
- Call (415)-554-4395 to speak with your Pollworker Coordinator; or,
- Email [pollworker.training@sfgov.org](mailto:pollworker.training@sfgov.org)