Communicating Election and Post-Voting Processes Toolkit — Central Language Document

This is the central language document for the Communicating Election and Post-Voting Processes Toolkit. This toolkit is for election officials in any size jurisdiction in the U.S. to create materials that educate observers and the public on election processes, with a focus on post-Election Day.

**Before using any parts of this toolkit, review and edit language here and in the templates to match your jurisdiction’s election procedures.** Throughout the document, “we” refers to the elections office, and “you” refers to any voter or observer.

* Review and edit all the blue and orange highlights, which indicate words that may change between jurisdictions.
  + Blue highlights change across states. We recommend filling them out at the state level.
  + Orange highlights may change across counties and should be filled out at the jurisdiction level.
* Delete any sections that don’t apply to you.
* Rearrange the order of steps to match your jurisdiction’s procedures.
* Add your election law citations.

**If you write more information, remember to do the following.** Read more about plain language in the toolkit introduction.

* Keep numbers (1, 2, 15, 120, etc) as numbers instead of spelling them out.
* Write in active voice most of the time. It’s the easiest type of sentence to understand (*You must follow these rules*). Sometimes this toolkit is written in passive voice to emphasize the object that we are talking about (*Valid ballots are prepared*).

**Vocabulary in this document is defined in the** [**Glossary**](https://docs.google.com/document/d/1id3rai8cxTm2rB-5oxQzHlsTT8fBZ6q3Re48lbbyEss/edit#heading=h.wmwryc2mm5hp) to match definitions in the [EAC’s Glossary of Election Terminology](https://www.eac.gov/sites/default/files/glossary_files/Glossary_of_Election_Terms_EAC.pdf).

[Observer Rules for processing steps](#_4uibhwfi3ptn)

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# Observer Rules for processing steps — Add this language to the Process Map Poster, Pocket Guide, and 1-pagers

If you’re interested in observing post-election processing, contact your local clerk for more information. The Canvass is open to the public and happens WHERE at WHEN.

You can find a schedule, more information, and request a reasonable accommodation on JURISDICTION.WEBSITE.gov. You can also watch a livestream of processing online at JURISDICTION.WEBSITE.gov.

In STATE, processing at our central facility is open to:

* Partisan citizen observers
* Nonpartisan citizen observes
* International nonpartisan observers
* Academic research observers.

As an observer, you must follow these rules:

* Only 1 partisan observer is allowed in each processing room.
* Check in on the sign-in sheet in each processing room.
* No phone calls are allowed in processing rooms.
* You cannot photograph or video individual ballots.
* ADD/REMOVE RULES TO MATCH YOUR JURISDICTION

# Step 1. Voter Registration

To register to vote, you are required to provide valid identification proving that you are eligible to vote. We review and verify that information, then put it into our voter registration database.

##### Election Law §

# Step 2. Election Equipment Testing

We use election equipment that meets State and Federal standards. We test our election equipment before each election.

##### Election Law §

Election equipment must:

* Be physically and digitally secure
* Accurately record votes
* Be auditable
* Enable the right to a secret ballot
* Be easy for voters to use

## Checks & Balances

### Logic and Accuracy (L&A) Testing

We test that our election equipment can:

* Read every ballot style.
* Read and record every possible valid and invalid voter choice.
* Accurately calculate the outcome of the election.

If the equipment fails to meet any standards, including the logic and accuracy test, we can’t use it for any election.

# Step 3. Mail Ballot Request and Voting

In STATE, registered voters can choose to vote by mail, early in-person, or in-person on Election Day. To vote by mail, voters are required to request a ballot and have a valid excuse to vote by mail. We send registered Uniformed and Overseas Civilian voters their ballots by mail, email, fax, or online portal.

**OR** In STATE, all registered voters receive a mail ballot. Voters can also choose to vote in their county elections office or at an Election Day vote center. We send registered Uniformed and Overseas Civilian voters their ballots by mail, email, fax, or online portal.

##### Election Law §

##### Military and Overseas Voter Empowerment (MOVE) Act §

# Step 4. Verify voter eligibility

We verify that every in-person voter is eligible to vote before giving them a ballot. We only send mail ballots to registered voters who have requested a ballot. We verify voter eligibility again when we collect mail ballots.

##### Election Law §

## How do we verify mail and Uniformed and Overseas Citizen voter eligibility?

We only send mail ballots to confirmed registered voters. **OR** We only send mail ballots to confirmed registered voters who request a ballot and have a valid excuse to vote by mail.

After collecting mail ballots:

* We scan the unique barcode on each mail ballot envelope to check it in. This updates the voter registration file and tells us if you have already voted in the election. This prevents people from voting more than once.
* We confirm that each ballot envelope has a signature.
* We compare the name and address on each mail ballot with the voter registration record. This again confirms that the voter is eligible to vote.
* We compare each ballot envelope signature to signatures we have in the voter’s voter registration file.
* We batch mail ballots for the next step, ballot processing.
* ADD STEPS TO EXPLAIN YOUR PROCESS ACCURATELY

At this point, all mail ballots are still in their ballot envelopes.

In JURISDICTION, we use machines to help election workers process the ballots. The machines:

* Read each ballot envelope’s unique voter registration code and look for a matching record in the voter registration database.
* Take a photo of the signature on the envelope.
* Sort the envelopes into districts.

## What is signature verification?

In STATE, we compare the signature on your mail ballot envelope to all the signatures we have in your voter record. In JURISDICTION, a machine helps us to compare and match signatures.

If the signatures don’t match, the mail ballot goes to manual signature verification for review by bipartisan election judges trained in signature verification.

If the signature was missing, or the bipartisan election judges agree that the signatures do not match, STATE voters have the opportunity to fix the issue. This is called the ballot cure process. We send these voters signature cure notices by mail, email, or phone. Voters have until DEADLINE to fix the issue with their mail ballot using the method of their choice.

##### Mail Ballot Signature Election Law §

## What happens if we can’t verify a mail voter’s eligibility?

In STATE, we contact you to let you know that we can’t verify your eligibility because your mail ballot envelope is missing required information, like your signature. This is called the cure process. You have until the DEADLINE to cure the mistake and return your mail ballot so that we can count it.

Cure Election Law §

## If we can’t verify that a voter is eligible to vote, we reject and do not count their ballot. We only count 1 ballot per eligible voter.

## How do we verify in-person voters?

When a poll worker checks you in to vote in-person:

* The poll worker finds your name and address in the poll book. This confirms that you are eligible to vote at the poll site.
* In STATE, you are required to show a valid Photo ID to vote in person.
* In STATE, you verify your identity when you are required to sign an affidavit of eligibility **OR** the poll book.
* In STATE, we update your voter record in the electronic poll book. This tells us if someone tries to vote more than once.

## What happens if we can’t verify an in-person voter’s eligibility?

If poll workers can't verify your eligibility when signing you in to vote in-person, they will give you a provisional ballot. Provisional ballots are one way we make sure that every eligible voter can vote!

Poll workers give you a provisional ballot if:

* You aren’t in the poll book.
* Your information is incomplete or incorrect.
* You choose to vote in-person after receiving a mail ballot. In this case, we only count the in-person vote.
* An election official or poll observer challenges your eligibility to vote.
* You’re registering on the same day as voting, and we can’t automatically verify your eligibility with your SSN or driver's license.
* ADD/REMOVE TO MATCH YOUR JURISDICTION

We store provisional ballots separately from other ballots until we investigate each provisional voter’s identity. We process these ballots last, so we are sure that a provisional voter hasn’t already cast a ballot. If an investigation finds that a provisional voter is not eligible to vote, we reject their provisional ballot and do not count it. We only count 1 ballot per eligible voter.

In STATE, we investigate and decide on the validity of all provisional ballots by DEADLINE.

##### Provisional Ballot Election Law §

## Can I challenge someone’s eligibility to vote?

In STATE, only registered party poll observers can challenge a voter’s eligibility to vote during in-person voting and before mail ballots are opened at the central facility.

## Who verifies that ballots come from eligible voters?

Our elections office, poll workers, and election workers work together to verify voter eligibility. We hire, do a background check, train, and certify poll workers and election workers. One of them may even be your neighbor!

## Checks & Balances

We have checks and balances to prevent people from voting more than once, including:

* Requiring voters to show a valid ID at the polls before voting **OR** Requiring voters to sign and verify their own identity at the polls before voting.
* Poll watchers can challenge voters' eligibility to vote if a voter fails to satisfy age, residency, or registration requirements.
* Updating your voter record in the electronic poll book. This tells us if someone tries to vote more than once.
* Routine audits of election processes.
* Researching voter eligibility before counting provisional ballots.
* Reviewing challenged voters during Canvass.
* ADD/REMOVE TO MATCH YOUR JURISDICTION

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# Step 5. Ballot Collection

In STATE, we collect all ballots at a central location for ballot tabulation.

**OR** In STATE, we collect mail ballots, Uniformed and Overseas Citizen ballots, provisional ballots at a central location for ballot tabulation. In-person ballots scanned at poll sites are stored on electronic memory devices. These electronic memory devices are brought to the central election facility for tabulation.

Election workers group ballots into batches of ### ballots for processing.

## How do we collect ballots returned by mail?

The USPS recommends mailing your ballot at least 7 days before the return deadline. The USPS delivers ballots returned by mail to our central facility. We store all ballots in secure containers until we begin ballot processing. In STATE, sentence about DEADLINE to receive mail ballots.

## How do we collect ballots returned to ballot drop boxes?

Bipartisan teams of election workers collect ballots returned to ballot drop boxes. In JURISDICTION, ballot drop boxes are tamper evident and under video surveillance.

Ballots are collected in sealed containers with tamper evident seals. We hire, do a background check, train, and certify poll workers and election workers. One of them may even be your neighbor! In STATE, we must receive your mail ballot by DEADLINE in order to count it.

## How do we collect ballots from Uniformed and Overseas Citizen voters?

Uniformed and Overseas Citizens return their overseas ballots by mail, email, fax, or online portal. In STATE, sentence about DEADLINE to receive Uniformed and Overseas Citizen ballots.

## How do we collect in-person ballots?

In STATE, bipartisan teams of poll workers bring in-person ballots to the central location for ballot tabulation.

In STATE, in-person ballots are scanned at in-person poll sites. Bipartisan teams of poll workers bring these ballots directly to storage. Digital records of the in-person ballots are stored on electronic memory devices that can only be read by the tabulation system. These electronic memory devices are brought to the central election facility for tabulation.

## Checks & Balances

Each container of ballots has a chain-of-custody record. The chain-of-custody tracks where every container of ballots has been and every Election Worker that interacted with it. The chain-of-custody record ensures that no ballots have been altered, added, or removed.

ADD/REMOVE YOUR JURISDICTION’S BALLOT ACCOUNTING AND RECONCILIATION MEASURES

We document procedures throughout the election to create audit trails that we review later.

# Step 6. Ballot Preparation

We process all ballots **OR** mail and Uniformed and Overseas Citizen ballots to prepare them for scanning and tabulation. If a ballot is damaged or contains machine-unreadable marks, we flag it for manual review. Our goal is to count all eligible ballots as voters intend.

##### Election Law §

Election workers group ballots into batches. This helps us to run checks and balances on the election later.

## How do you prepare mail ballots?

Bipartisan teams of election workers:

1. Check the ballot envelope for completed information and that inner envelopes and secrecy sleeves were used as required.
2. Remove each mail ballot from its mail ballot envelope. This separates your identity from your ballot and ensures that your vote is private.
3. Check if a mail ballot is unreadable or damaged, and flag these ballots for manual review.
4. ADD/REMOVE/MAKE MORE SPECIFIC TO MATCH YOUR JURISDICTION

## Who prepares ballots?

Ballots are prepared by teams of election workers. We hire, do a background check, train, and certify poll workers and election workers. Election workers are overseen by a supervisor in charge and the Election Director.

## When do we begin ballot preparation?

We make sure that our election workers have the time to accurately tabulate and double-check the results of the election. We process and verify all ballots we receive by applicable deadlines so that we count every valid ballot by DEADLINE.

In STATE, we begin pre-processing mail ballots starting # days before Election Day. Pre-processing includes verifying voter eligibility, preparing ballots for scanning, and scanning ballots. Doing pre-processing means that tabulation and unofficial results happen much quicker after polls close on Election Day. Tabulation does not happen until after the polls close on Election Day.

**OR** In STATE, we begin preparing in-person ballots on Election Day.

## Why do we manually process some ballots?

We manually process ballots that the scanner can’t scan because they are unreadable, damaged, or defective.

## What makes a ballot unreadable, damaged, or defective?

The ballot scanner can read most ballots. Ballot scanners are programmed with specific guidelines, so they accurately read voter marks and reject ballots that don’t meet the guidelines. Ballot scanners can’t read ballots that:

* Are stained, torn, or physically damaged.
* Are filled out using a writing tool that isn’t a READABLE WRITING TOOLS.
* Have extra marks.
* Have marks for more candidates than you can vote for.
* Have strikethroughs.
* Have circle-like marks.
* Have written words to indicate candidate choice.
* Are printed on paper that doesn’t match the correct specifications, like ballots coming from Uniformed and Overseas Citizens.
* Don’t have the correct style codes which tell the scanner that the ballot is a valid ballot created by the voting system for the current election.
* ADD/REMOVE TO MATCH YOUR JURISDICTION

In STATE, we are required to try our hardest to determine each voter’s intent so we can count their ballot. If a scanner can’t read a ballot, a team of bipartisan election workers will determine the voter's intent.

## How do we determine voter intent?

Sometimes voters mark their ballot in ways that make it difficult for us to determine how they intended to vote. When this happens, a bipartisan team of election workers reviews the ballot for an indication of which candidate a voter chose.

Sometimes this is obvious, and other times it isn’t as clear. Election workers use state voter intent guidelines to make these decisions. These guidelines are applied to every ballot that goes through the voter intent process. The manual ensures that voter intent decisions are consistent across election workers and elections. You can ask to see a copy of our voter intent guidelines or find them online at JURISDICTION.WEBSITE.GOV.

If the team can’t agree on how to determine the voter’s intent, the vote must be challenged and decided by a judge in court.

##### Voter Intent Election Law §

## Ballot Envelope Storage

Mail ballot envelopes are put in sealed containers with tamper evident seals and brought to storage. These seals show if the ballot envelopes are accessed without permission. We keep track of where every mail ballot and every mail ballot envelope is stored during the election in case we need them for a recount or audit.

## Checks & Balances

When we open mail ballot envelopes, election workers make sure that each valid ballot comes from a registered voter and that each registered voter has submitted only their own ballot before the ballots are scanned.

# 6B. Ballot Duplication

We use ballot duplication if the ballot scanner can’t read a ballot because it is damaged or has unclear voter intent. We also use ballot duplication for Uniformed and Overseas Citizen ballots.

## How do we duplicate ballots?

During ballot duplication, a team of bipartisan election workers:

1. Remakes the voter’s selections on the original ballot onto a clean ballotthat the ballot scanner can read.
2. Gives the original ballot and ballot duplication the same unique number so that we can identify them and easily compare them when required during audits and recounts.
3. Compare the marks on the original damaged ballot to the marks on the duplicated ballot using call and response to make sure the voter’s intent was duplicated correctly.
4. Send the duplicated ballot to ballot tabulation for scanning. We only count 1 ballot per eligible voter.

##### Ballot Duplication Election Law §

## Ballot Storage

We store all ballots and other records that include federal contests in sealed containers with tamper evident seals for 22 months. These seals show if the ballot envelopes are accessed without permission.

We store both the original damaged ballot and duplicated ballot. We keep track of where every ballot is stored during the election in case we need them for a recount or audit.

## Checks & Balances

ADD/REMOVE YOUR JURISDICTION’S BALLOT ACCOUNTING AND RECONCILIATION MEASURES

Election workers compare the number of original damaged ballots with the number of duplicated ballots to make sure the numbers match.

# Step 7. Ballot Tabulation

We scan and count all the valid votes to determine the results of each contest in the election. In STATE, we tabulate in-person ballots at the poll sites where the vote was cast.

##### Election Law §

## How do we tabulate ballots?

1. We use ballot scanners to determine the votes made for all races on each paper ballot. The ballot scanner:
   * Detects and scans the votes made on each ballot.
   * Records those votes in an electronic Cast Voter Record.
   * Detects and flags ballots that are unreadable, unprocessable, or contain write-in votes.
2. The scanner puts the results from each batch **OR** precinct on a paper ticker tape **OR** secure flash drive.
3. We copy the totals from each paper ticker tape onto a tally sheet and add the vote totals to determine the results of the election. **OR** We bring the secure flash drives to the electronic tabulation system that adds up the vote totals to determine the results of the election.

## When do we start tabulation?

We start tabulating unofficial results after the polls close on Election Day.

In STATE, we pre-process mail ballots # days before Election Day. Pre-processing includes ballot preparation and ballot scanning. This helps everything go smoothly so we can report unofficial results to you as soon as possible.

## How long does it take to tabulate all the ballots?

We start tabulating unofficial results after the polls close on Election Day. We tabulate ballots as we receive them until all ballot return deadlines have passed and we have counted every valid voted ballot. It takes time for our election workers to count all the ballots!

## Why don’t we count all of the ballots by hand?

We use every available process to count every ballot as quickly, securely, and accurately as possible. If we counted all ballots by hand, it would take much longer, and it would be hard to audit and check the accuracy of the election.

All of our election equipment is tested and certified before each election. Election technology is tested for accuracy, checked for tampering, and physically secured using video surveillance and access controls. In STATE, ballot tabulation equipment cannot connect to the internet.

## How do we know if the tabulation equipment and ballots are secure?

Our electronic tabulation system is kept in a locked room with limited access. We also have 24/7 video surveillance of processing areas during the election, including where the electronic tabulation system is kept.

Whether you are an election worker or an observer, you must be authorized to enter any room where election processing is happening.

All of our election equipment is tested and certified before each election for physical and digital security. In STATE, ballot tabulation equipment cannot connect to the internet.

## What if the ballot scanner can’t read a ballot?

The ballot scanner can read most ballots. If the scanner cannot read a ballot, it rejects it as unreadable or unprocessable and manually processed.

## Ballot Storage

After tabulation, all ballots and other records are securely stored as part of the official record and for audits and recounts. We keep track of where every ballot is stored, so we can find them when they are needed for an audit, recount, or challenge.

## Checks & Balances

ADD/REMOVE YOUR JURISDICTION’S BALLOT ACCOUNTING AND RECONCILIATION MEASURES

We run audits to confirm that election equipment accurately interpreted voters' intent and that the outcome of the election reflects how voters voted. Stored paper ballots are the hard-copy backup of all election results.

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# Step 8. Unofficial results

We begin publishing unofficial results after the close of polls on Election Day. Unofficial results are published HOW OFTEN. Results are unofficial until after all ballot return deadlines have passed and after we have counted every valid ballot we received.

##### Election Law §

## What are unofficial results?

Election Night results are always unofficial because we are still counting ballots, and the election is not yet certified.

Unofficial results include:

* In-person ballots from Election Day
* In-person ballots from early voting
* Mail ballots received by Election Day
* Uniformed and Overseas Citizen ballots received by Election Day

Unofficial results may not yet include:

* All valid write-in votes
* All valid provisional ballots
* All valid absentee ballots
* All valid manually processed ballots
* All valid Uniformed and Overseas Citizen ballots

## Why do you share unofficial results?

We share unofficial results to be transparent as we process and tabulate voted ballots. We share the results with local and national news media. Anybody can access unofficial results on our jurisdiction website at JURISDICTION.WEBSITE.gov. We update unofficial results HOW OFTEN.

## Why are the results unofficial?

The results are unofficial because we haven’t counted every valid voted ballot yet. Our job is to protect your right to vote by counting every valid ballot cast in the election.

Election results are unofficial until:

* The mail ballot return deadline has passed
* Every valid voted ballot is processed and tabulated
* Research on provisional ballots is completed
* Required auditing is completed
* The Canvass reviews and confirms the results
* The election is certified

## When will the results be official?

The Canvass certifies the election and makes the results official by DEADLINE.

## Why do the results keep changing?

The unofficial results shift as we count all valid ballots that we have collected.

# Step 9. Audit

Audits are a normal check and balance that is part of every election. We use audits to confirm that election equipment accurately interpreted and tallied voters' ballots, that the outcome of the election reflects how voters voted, and that election workers followed procedures.

We share audit results and our plan of action based on the results.

### Risk-Limiting Audit

A Risk-Limiting Audit is a method for conducting a post-election tabulation audit. It selects a statistically significant sample of ballots for human review to determine if the outcome of the election is correct.

This audit checks that ballot scanners accurately interpreted every voter's selections, and that tabulation equipment accurately calculated the outcome of the election.

### Fixed Percentage Audit

In this method of post-election tabulation audit, we select a fixed percentage of districts, and compare a hand count of those physical ballots to the tabulation equipment’s electronic tally. This audit checks that ballot scanners accurately interpreted every voter's selections, and that tabulation equipment accurately calculated the outcome of the election.

### Procedural Audit

We review and verify that election workers followed election procedures.

* We review security and chain-of-custody procedures.
* We compare the number of ballots given to voters against the number of ballots we counted.
* We compare the number of voted ballots to the number of voters.
* ADD/REMOVE TO MATCH YOUR JURISDICTION

### Recount

During a recount, some or all of the valid voted ballots are recounted to find out if the initial tabulation was correct, and the official results may change. Recounts can be done by hand or with ballot scanners and tabulation equipment.

In STATE, we recount the election if:

* The winner won by less than %
* The winner won by less than #### votes
* A candidate requests a recount
* A court orders a recount
* ADD/REMOVE TO MATCH YOUR JURISDICTION

# Step 10. Canvass of Election Results

After all valid ballots have been counted, the Board of Canvassers reviews the election, resolves discrepancies, and verifies the outcome of the election.

##### Election Law §

## What happens during Canvass?

The Board of Canvassers reviews documentation of the election written by elections workers and the Elections Director to:

* Verify the total number of voters in an election.
* Verify that only valid votes were included in the final election results.
* Account for every ballot issued and returned, including all mail, early voting, Election Day, provisional, challenged, and Uniformed and Overseas Citizen ballots.
* Decide whether provisional ballots should be counted based on research into each provisional voters’ registration by elections officials.
* ADD/REMOVE TO MATCH YOUR JURISDICTION

After reviewing and verifying the election, the Board of Canvassers submits a Canvass Report to top election officials in the jurisdiction and state.

## Who does the Canvass?

The Canvass process is done by PEOPLE INVOLVED IN THE CANVASS PROCESS. The Board of Canvassers includes PEOPLE ON THE ELECTION BOARD.

## Checks & Balances

We use every available process to make the election secure and accurate. The Canvass gives an extra guarantee that the election was conducted securely and accurately.

If there is a discrepancy, the Canvass investigates and resolves it. We implement new procedures to prevent similar discrepancies in the future.

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# Step 11. Certification of Official Election Results

After the Board of Canvassers reviews and verifies the outcome of the election, official election results are certified by the county and state. Certified election results are published on our county website at COUNTY.WEBSITE.GOV WHEN.

##### Election Law §

## When are official election results certified?

In STATE, election results are certified by DEADLINE.

## Who certifies the official election results?

The state chief election official, governor, or board of canvassers certifies the election results.

## When does the Electoral College meet?

The Electoral College is only used to elect the President and Vice President. During a presidential election, JURISDICTION certifies the election of presidential and vice-presidential candidates’ electors to the Electoral College. We certify the election by DEADLINE so that the Electoral College can meet by DEADLINE.

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# Step 12. Ballot Storage

We securely store all paper ballots and other records as part of the official record for ## MONTHS. We store ballots that include federal contests for 22 months. We aren’t allowed to open the boxes during this time. After 22 months, the ballots are destroyed.

##### Election Law §

## Why do we store ballots?

We store ballots as part of the official record in case they are needed for audits, recounts, or challenges.

## How do we secure stored ballots?

We store ballots in sealed containers with tamper evident seals. Ballots are stored in secure rooms with limited access. No one can open the boxes during this time without a court order.