

# New Chief Officer Training

June 2024 Dual Primary Elections

June 18, 2024

# Welcome to Training

- **Thank you** for agreeing to become a Chief Officer. Thank you for your service.
- The **Chief Officer** is responsible for the election **at your precinct** and management of the **election team**.

# Introduction and Housekeeping

# The Chief's Work Begins Early...

- The Chief **sets the tone** and establishes the initial communication for the team.
- The Chief is the only person on the team that **receives everyone's contact information**. It is important to connect everyone on the team by email.

# Initial Paperwork for Election Day

## 1. Assignment Letter

- Assignments are made by the Election Officer Coordinator.
- Everyone receives an assignment letter.

## 2. Chief's Letter to the TEAM

- This letter is your initial communications with EO's.
- Send this at least 1 month prior to election day.

# Assignment Letter

- **Ensure you have the following positions assigned to your precinct:**
  - Assistant Chief Officer (AO)
  - Equipment Provisional Specialist (EPS)
  - You will be assigned Election Officers (EO) as needed for your precinct.
  - These assignments are subject to change.

# Example of Assignment Letter

This email is from an EXTERNAL source. Use caution when replying or clicking embedded links.

Hello!

**Note: This message is sent to you from Prince William Office of Elections.**

Message:

Dear Prince William County Election Officer,

Congratulations! You have been assigned to work the March 5, 2024, Presidential Primary Election. Click the link below to log into the Election Officer Portal, to see your precinct and sign-up for training! IMPORTANT: If you are first time user, you will need to click the **"Click Here to Register"** link the first time you log in to the NEW Officer Portal to set-up your password. If you are having difficulty logging in, please call us at 703-792-6485.

**Officer Portal Link:** [Election Officer Portal](#)

If you cannot serve in the March 5th, 2024, Presidential Primary Election, please email [electionofficer@pwcgov.org](mailto:electionofficer@pwcgov.org) to notify the Staffing Department as soon as possible so we can begin to find your replacement.

**Training Note:**

In case of inclement weather, we will follow the Prince William County plan. Affected classes will be notified via email and text message.

**Training Requirements for each role:**

**Chiefs, Assistant Chiefs, and Equipment Provisional Specialists (EPS):**

All Officer Training (Virtual or In-Person)

# Assignment Letter

1. Log into the portal.
2. Top middle of the home page click on:
  - “Click Here for Roster”



# Assignment Letter

**Demonstration on how to navigate the portal.**

# Chief's Letter to the TEAM

- Chief's Letter to the **WHOLE TEAM** is usually **via email**.
- Send this **no later than 1 month prior** to the election.
- As Chief you should **share contact information** of your team **with the AO** as soon as possible.
- Some Chiefs host **zoom or in person meetings and/or calls** prior to election day. This allows you to gauge your team's ability and experiences.

# What Should Your Chief Letter Say?

- **Welcome** everyone to the precinct team. Invite everyone to the walk through of the precinct location.
- **Talk about Work:** Arrival Time & Assignments.
- **Talk about Planning Ahead & Early Voting:** Encourage your team to plan for the needs of their pets and family. Election Officers should vote early because they cannot leave the precinct on Election Day.
- **Talk about Food:** Potluck, shared dishes, order in, every person on their own.
- **Talk about Training:** Stress training and encourage attending the open house /workshop to practice.

# Example of CHIEF'S LETTER to Officers

Hello Election Team,

**Welcome** to the election team for precinct number 999. The election is one month away on June 18<sup>th</sup>.

**We appreciate you serving** as Election Officers, elections do not happen without people like you.

**Election Day Schedule:** Election Day is a long day from **5am to about 9pm**. You are **not permitted to leave your precinct** until the election has ended and all end of night paperwork is complete. So, please plan for the needs of your pets, family, and **VOTE EARLY**.

# Example of CHIEF'S LETTER to Officers (continued)

## The Assignments for Precinct --- are as follows:

- **Chief (CO):** John Doe
- **Assistant Chief (AO):** Jane Doe
- **Equipment Provisional Specialist (EPS):** James Doe
- **Election Officers:** Jean Doe, Jack Doe, Johnny Doe, Jackie Doe
- **Election Officers will rotate** between greeter, check-in, marking station, ballot scanning assistance, cleaning (everyone cleans) and handing out “I Voted” stickers.
- **Equipment:** After the oath James and Jackie will assemble the Scanner and Touch Writer. Jean and Johnny will assemble the Pollbooks.

# Example of CHIEF'S LETTER to Officers (continued)

**Food on Election Day:** Please **bring enough food to sustain you** from 5am to 9pm. If you would like to bring food to share, please feel free. However, if you prefer to take care of only your food needs that is perfectly fine. You may also order food to be delivered at your own expense.

**Medications:** Again, you cannot leave the precinct, so please **bring all medications** you are required to take.

**Additional Training:** Please take advantage of **Open House Sessions** where you can practice most elements of the election. i.e. setting up machines, end of night paperwork, and practicing checking people in on the Pollbook.

# Example of CHIEF'S LETTER to Officers (conclusion)

**Site Walk Through:** We will conduct a walk through of the precinct on **June 10th at 6pm**. Please join us if you are available, so that you can meet the team in person and get familiar with the precinct space and duties.

**Team Meeting:** I will host a **zoom meeting/conference call on June 11<sup>th</sup> at 6pm** for the team. Please plan to attend so we may prepare for election day and address any questions or concerns

**Night Before Election Set Up:** We will be setting tables and preparing the site for the election day on Monday June 17<sup>th</sup> at 6pm. Please join us, if you are available.

Thank you, again, I appreciate your service very much. Be on the look out for my email updates as we get closer to election day. If you have any questions, please email or call me at 351-555-5555.

Sincerely,  
Chief Officer John Doe

# CHECK OUT POLLING LOCATION

- You are **required to do a walk through** of the site prior to the election.
- **Contact Sheet** will have your facility contact information.
- You will be sent a link to your facility contact sheet.



# CHECK OUT POLLING LOCATION (cont.)

- Make this a **team building exercise**, if you desire.
- **Invite the team** members to meet you there and get familiar with the space.
- Get together and **discuss the election** on site, via phone, or zoom.

# Site Contact

## Site Contact Sheet Example

March 2021 Precinct Primary  
Prince William County Office of Elections Pct #: 304

ELECTION CONTACT & INFORMATION SHEET

Polling Location: Lillian Carden Community Center Phone: (571) 334-3432  
Address: 222 Third Avenue Quantico VA 22134 Sec #: (703) 640-7411  
Principal/Director: Mayor Kevin Brown

Primary and Emergency Contacts: The Primary contact should be available on a daily basis to handle pre-election coordination between the Office of Elections and the polling place. Emergency Contacts should live near the polling location or be on site by 4:45 AM on Election Day. Emergency Contacts must be on "standby" and able to handle building issues between the hours of 5:00 AM and 9:00 PM. Please indicate hours of availability for all Emergency Personnel.

| Primary Contact | Title/Name   | Cell #        | Email                    |
|-----------------|--------------|---------------|--------------------------|
|                 | LINDA DREW   | (703)640-7411 | clerk@townofquantico.org |
| Availability    | 7:30 am -6pm |               |                          |

| Emergency #1 | Title/Name        | Cell #       | Email                    |
|--------------|-------------------|--------------|--------------------------|
|              | Mayor Kevin Brown | 571-334-3432 | mayor@townofquantico.org |
| Availability | 5am-11pm          |              |                          |

| Emergency #2 | Title/Name | Cell #        | Email              |
|--------------|------------|---------------|--------------------|
|              | Linda Drew | (240)380-4101 | ldrew264@gmail.com |
| Availability | 5am-11pm   |               |                    |

# LET'S TALK TRAINING

- The **Assignment Letter covers Training** details. **Be sure to read it.**
- As CO, AO, and EPS, you are required to take a training for **EVERY** election. (*All Officer Training*) (*LCT once a year between Sep and Jun*)
- EOs will always be required to take training. (*Either New Officer Training or All Officer Training.*)
- You can suggest your EOs attend an **Open House Workshop for hands on practice** or other trainings when space is available.
- Training will be in-person and/or online. **Note:** Some training types are only available in-person.

# Supply Distribution

- You will get a review of the Chief Binder.
- You will review the contents of the Chief bag.
- You will sign for your ballots.
  - *The provisional ballots will be in your Chief Bag, the regular ballots will be in the cage.*
- If needed, you can pick up stand-up marking stations.
- You will be given any important last-minute information and may ask questions of election office staff at the time of pick up.

# CHIEF BAG



# Front

## CHIEF BINDER

Precinct #: 999

Precinct Name: Sample Precinct

Facility: Sample Facility

If you need to call 911  
Provide the address below:

9250 Lee Ave  
Manassas, VA 20110

# Back

## SUPPLY RETURN FORM

Presidential Primary | March 5, 2024

Bring this completed form with you to Supply Return.  
Please stay in your vehicle when returning supplies.

PCT # \_\_\_\_\_

### Hand to Elections Staff

EO Check  Staff Check White Bag  
and this form (filled out) with

- Cellphone, Tablet, and Chargers**  
powered off
- #9 Envelope**  
With Ballots Enclosed  
Signature Label & Tamper Tape  
With **completed** Chain Of Custody  
Form & Quantity (even if zero)
- #1A Envelope** (One for each Party)  
Signature Label & Tamper Tape  
Ballot Quantity  
D \_\_\_\_\_ R \_\_\_\_\_
- #1B Envelope** (One for each Party)  
Ballot Quantity  
D \_\_\_\_\_ R \_\_\_\_\_
- #2 Envelope**  
Signature Label & Tamper Tape
- #2A Envelope**  
Signature Label & Tamper Tape
- #4 Envelope**  
Signature Label & Tamper Tape
- #7 Yellow Pouch**  
**Containing:**  
vDrive(s) (Verity Drives)  
EPB Flash Drive(s)  
Keys  
Seals
- #8 Envelope**  
Do NOT Seal
- X Envelope**  
Seal with Signature Label & Tamper  
Tape only if used

### Trunk or Backseat

EO Check  Staff Check **Chief Bag with**

- #3**  
Signature Label & Tamper Tape
- #6** (including unused provisionals)  
Signature Label & Tamper Tape
- Chief Bag Items**  
Binder, Law Book, etc.

### EOs Returning:

Print Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Print Name: \_\_\_\_\_

Phone: \_\_\_\_\_

### Office Use Only

# Supply Distribution (cont.)

- The Chief will pick up supplies at our warehouse.
- The warehouse is located at  
**13851 Telegraph Road, Woodbridge, VA.**
- The person who picks up supplies gets reimbursed for driving. We recommend the Chief pick-up supplies as it serves as a review.

# Supply Pickup

## Dates

- Thursday June 13<sup>th</sup>, 12 noon until 7 pm.
- Friday June 14<sup>th</sup>, 9 am until 7 pm.
- Saturday June 15<sup>th</sup>, 9 am until 1 pm.



# SET-UP ON MONDAY NIGHT BEFORE ELECTION DAY

- There is **some preparation** that you can do on Monday night. **Invite all your EO's** to meet at precinct to help with team building.
  - Discuss EO's assigned job for Monday set up and election day jobs.
  - Everyone may not be able to make it, it is not required.

# SET-UP ON MONDAY NIGHT BEFORE ELECTION DAY (cont.)

## What's allowed for Monday Night Set up?

- Take a picture of the cage before you unload anything.
- Tables and chairs for staff and voters – preparing for Tuesday morning.
- Indoor signs.
- Printer and printer table.
- Ballot box.
- **DO NOT REMOVE** Scanner, TW, or Pollbooks from the cage until Tuesday morning.
- **Bring your Chief Bag** home with you, do not leave it at the precinct.
- Lock cage.

# Special Assistants

## What are Special Assistants (SA) and do they help us.

- A SA is the highest position an EO can attain.
- The SA is the quick response section of headquarters.
- They visit a set number of precincts on election day.
- They are sent to assist precincts as needed.
- They also ensure the precinct is following Election Office policy.

# Poll Watchers/Authorized Representatives

## What are Poll Watchers and what are they allowed to do.

- They are political party representatives who are allowed to be in the polling place.
- Must have authorization letter from candidate on the ballot.
- One per candidate is allowed in each polling place prior to 6:00 am.
- Up to three per candidate is allowed after 6:00 am..







# Poll Watchers/Authorized Representatives (cont.)

## What are Poll Watchers and what are they allowed to do.

- They are allowed to see and hear what happens. They shall never see any personally identifying information (PII).
- They may not hinder or delay a voter or election officer.
- They are allowed to see the pollbooks.
- Cannot violate anyone's privacy.

# Media

Other Personnel

-  Members of the media with credentials are permitted inside.
-  They can film background shots only when inside the polling place.
-  No live interviews or reporters remarks when inside the polling place.
-  No filming any person who asks not to be filmed.
-  Can only stay a reasonable and limited time between 6 am - 7 pm.
-  Cannot violate anyone's privacy.

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# ELECTION DAY: Before 6am

Election Day >

Before 6AM

- Give Oath to all officers and read “When Ballot Cast Regulation aloud.”
- Set up Scanner and Touch Writer.
- **Print 3 Zero Tapes from Scanner and 1 Zero Tape from Touch Writer.**
- Open polls on Scanner and Touch Writer.

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# ELECTION DAY: Before 6am (cont.)

Election Day >

Before 6AM

- Complete Pollbook Summary Report.
- Open polls on Pollbook.
- Post outside signs to include Outside Polls Voter DOORBELL.
- Log into Tallypoint on iPad or iPhone and click “THIS PRECINCT IS READY.”
- **Please note: No one can vote before 6am.**

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# POLLBOOK SUMMARY REPORT

Before 6AM



Pollbook Summary Report

Precinct: \_\_\_\_\_

Return all copies  
in Envelope 2

Election: Dual Primary

Date: March 5, 2024

Refer to the Election Officer Manual for steps on accessing Pollbook Summary in ePolltabs.

|  | Serial #: |       | Serial #: |       | Serial #: |       |
|--|-----------|-------|-----------|-------|-----------|-------|
|  | Open      | Close | Open      | Close | Open      | Close |
| Voter Count                                      |           |       |           |       |           |       |
| Checked in Count<br><i>(Required on the SOR)</i> |           |       |           |       |           |       |
| Democratic Party<br>Check ins:                   |           |       |           |       |           |       |
| Republican Party<br>Check ins:                   |           |       |           |       |           |       |
| Absentee Count                                   |           |       |           |       |           |       |
| Outside Polls                                    |           |       |           |       |           |       |
| Affidavit<br><i>(Affirmation of Eligibility)</i> |           |       |           |       |           |       |

# Drop Box

Before 6AM



## **This gray box in the cage has:**

Clip Boards, Tape bag, "I Voted" Stickers, EO vests, EO buttons, and Ballot Marking pens.

- Before voting starts empty the box.
- During voting hours, the box will be the "Ballot Drop Box."
- After voting is over remove the ballots, repack the box, and return it to the cage.

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# ELECTION DAY: 6am to 7pm

Election Day

- **At 6:00 AM: Announce the POLLS ARE OPEN.**
- **Your job is to ensure an orderly election day.**

# What is TallyPoint used for?

6AM-7PM >

TallyPoint

- Track **Hourly Vote Counts**.
- Track and log **Provisional Voters**.
- Used to submit **Election Results** at the end of the night.
- Tallypoint is loaded on **iPad and iPhone**
- **Please note:** The programs *Translate* and *What If's* are also loaded on your iPads and iPhones and may be helpful to your team on Election Day.

# ELECTION DAY: 6am to 7pm (cont.)

6AM- 7PM

## Things to watch for:

- **Check in at Pollbook:** Making sure people are all the way checked in.
- **Hourly Update on TallyPoint:** Compare your pollbook to the scanner.
- **Provisional Voting and Same Day Registration:** Ensure envelopes are signed and fully completed, enter data into TallyPoint before they cast their vote.
- **Unruly Voters:** The job is to move voters through the process smoothly, hence you are to take control of anything unusual.
- **Ballots:** Make sure the provisional and regular ballots do not get mixed up.

# SOR Part F



## SOR Part F: Explanation of Discrepancies \ Incident Report

Statement of Results  
Verity Scan Voting Equipment & EPBs  
Prince William County

White Top Copy: Office  
Pink Middle Copy: SOR1 to Office  
Yellow Bottom Copy: SOR2 to Courthouse

RETURN ALL COPIES IN ENVELOPE 2

Precinct: 202  
Election Date: March 5, 2024

### EXPLANATION OF DISCREPANCIES

| TIME | COMMENTS / PROBLEMS | EO Initials |
|------|---------------------|-------------|
|      | None                |             |
|      |                     |             |
|      |                     |             |
|      |                     |             |
|      |                     |             |
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|      |                     |             |
|      |                     |             |

Use another sheet if additional entries need to be made.

Part F Verity Scan Revised MLW February 2016

- The Part F is used when the pollbook checked in number differs from the ballot number on the Scanner.
- Use it to document any issues you have on election day.
- If there is nothing on the form draw a line through the form and put it in envelope 2.

# ELECTION DAY: After Polls Close

After Polls Close

- At 6:45pm: Announce “POLLS WILL CLOSE IN 15 MINS.
- **At 7pm: Announce “POLLS ARE CLOSED.”**
- If you have voters in line text Chief HQ the number.
- After the announcement, have an Election Officer become the last person in line.
- **REMEMBER: “No one is allowed to get in line after you close the polls.”**



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# ELECTION DAY: After Polls Close (cont.)

After Polls Close

## End of Night Paperwork and Data Submission

- Print 3 Tally Tapes and Gather Zero Tapes.
- Complete Pollbook Summary Report.
- Complete Tallypoint Election Results submission **(High Priority)**.
- Complete Yellow Return Sheet.
- Complete Statement of Results (2 copies).
- Place paperwork in proper folders all day long to avoid confusion.
- Prepare end of the night envelopes and have everyone sign.



# Statement of Results

**STATEMENT OF RESULTS 2**  
**CIRCUIT COURT COPY**  
**PLACE IN ENVELOPE 2**  
June 18, 2024 Dual Primary  
Prince William County, Virginia  
«PCT» «Name»

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**Presidential Primaries**

**Part 1a. Turnout.**  
*\*Obtain these numbers from the pollbook(s).*

|                      |   |              |   |                            |
|----------------------|---|--------------|---|----------------------------|
| Dem<br>Count         | + | Rep<br>Count | = |                            |
|                      |   |              |   | TOTAL VOTERS<br>CHECKED IN |
| Outside Polls Voters |   |              |   |                            |

**Part 2a. Votes Cast.**  
**Number of Votes Cast on Machine(s)**  
Scan 1 Serial: «Scan1\_Serial»  
Scan 2 Serial:

|  |   |              |   |                                 |
|--|---|--------------|---|---------------------------------|
| Dem<br>Count   | + | Rep<br>Count | = |                                 |
|  |   |              |   | TOTAL VOTES<br>CAST IN PRECINCT |
| Number of ballots counted <u>by hand</u>   |   |              |   |                                 |
| Total Number of Votes Cast<br><i>Add the number of votes cast on machine(s) and the number of counted by hand.</i> |   |              |   |                                 |

**Part 2b. Drop Box.**

|  |  |
|--|--|
| Total Number of Ballots Received in<br><u>Drop Box</u> |  |
|--|--|

**Part 3. Discrepancies.**  
Does the Total Number of Voters Checked In = the Total Number of Votes Cast in Precinct?  Yes  No  
*If "No," please explain all discrepancies on Part F Form.*

**Part 4. Certification.**  
We hereby certify that the two copies of the Statement of Results are a complete record of this election and that all of the information entered hereon is true and correct.

Signatures of Election Officials

|   |                   |    |
|---|-------------------|----|
| 1 | (Chief)           | 7  |
| 2 | (Assistant Chief) | 8  |
| 3 |                   | 9  |
| 4 |                   | 10 |
| 5 |                   | 11 |
| 6 |                   | 12 |

↑  
Paper Clip ZERO Tape  
and TALLY RESULTS  
Tape here.

Beginning of day:  
1. Print zero tape(s).  
2. All Officers sign zero tape(s).  
3. Attach zero tape here.

End of day:  
1. Print tally results tape(s).  
2. All Officers sign tally tape(s).  
3. Attach tally tape on top of zero tape.  
4. Fill out the SOR.  
5. Report any discrepancies in Part F of the SOR.  
6. All Officers MUST sign SOR.

- Two copies
  1. Circuit Court Copy
  2. Director's Copy
- Should be the last document filled out on Election Day.
- *Let's review the form.*

# ELECTION DAY: After Polls Close (cont.)

After Polls Close

- **Data Drives:** Remove USB drive from the scanner and the pollbook and place in yellow pouch.
- **Seals:** Cut seals and place in yellow pouch and replace seals on machines
- **Provisional Ballots:** Break seal on the green provisional ballot bag with two people. Remove PB, record data and sign envelope 1A.
- **Drop Box:** Open grey Drop Box with key with two people. Remove envelopes, record data, and complete Chain of Custody form.
- **Drop Off Check List:** Review check list on the back of the Chief Binder to prepare for supply return.

# ELECTION DAY: After Polls Close (cont.)

After Polls Close

- **Jobs:** Assign EO's their job for breakdown.
- **Load Cage:** Break down precinct and load cage. Follow picture you took before you unloaded cage to reload cage.
- **Envelopes:** Seal and load envelopes according to the drop off check list. Everyone participates in end of the night envelopes.
- **Clean Up:** Leave precinct neater than you found it.

**THANK YOU!**

**Let's make it a great election** 