


# Vote by Mail Procedures Manual

*Published by*

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*In conjunction with*

Oregon Association of County Clerks




## 2014

Secretary of State  
Kate Brown

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 The Vote by Mail Procedures Manual and associated forms are adopted by Oregon Administrative Rule No. 165-007-0030.

# Election Personnel, Facility Management and Supplies


## Before filing deadline

### Analyze space needs


---

Adequate space is necessary to:

- 1 Assemble the ballot packets, if mailing preparation is performed in-house.
  - Depending on the size of the ballot and the number of extra materials inserted, mail trays will hold approximately 200-250 ballot packets using a size #11 outgoing envelope.
  - To control the flow of materials and expedite the overall process, various teams could be set up:
    - ✓ Control Team
    - ✓ Labeling Team
    - ✓ Packet Assembly Team
    - ✓ Support Team
    - ✓ Sort Team

 If inserting is performed by a mailing house, extra space may not be as critical.


- 2 Sort undeliverable ballots, since they should be reviewed immediately.

 See Undeliverables on page 46.

- 3 Process voted ballots:
  - Signature verification
  - Precincting
  - Ballots needing further review
  - Opening envelopes
  - Ballot scanning
  - Dropsite returns

- 4 Setup equipment, including space for a minimum of 3 voting booths.

- 5 Retain the master list of electors (return identification ballot envelopes) for 2 years.

 ORS 254.472-254.474, 254.535, OAR 166-150-0035

### Analyze staffing needs


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#### The county elections official:

- Ensures each individual performing signature verification relating to petitions or ballot return envelopes in their county is informed and receives instructions regarding the requirements and guidelines.

#### Regular elections staff:

- Supervise the mailing preparation process if the election mailing preparation is performed in-house.
- Provide on-site supervision if the election mailing preparation is performed by a mailing service.

 Peak periods may require either more personnel or staggered shifts, if space and/or equipment are not available or are being used to fullest capacity.

# Election Personnel, Facility Management and Supplies (cont.)

## Before filing deadline

### Analyze equipment needs, which may affect space needs

---

Consider potential bottlenecks and solutions, such as:


- Ability to run data exports/addresses for mailing companies
- Software that provides CASS certification (intelligent mail barcode)
- Insertion, folding and sealing machines
- Printer
- Postage meter
- Automatic letter opener
- Electronic ballot sorting
- Sorting (alpha and/or by precincts)

## Ongoing

### Tally system maintenance

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The county elections official:

- 1 Shall obtain a copy of the written instructions for the operation and maintenance of any component of a vote tally system from the vendor.
  -  Components include the network, program, software and system.
- 2 Shall keep a log of all maintenance performed on any component of the vote tally system after component is purchased and installed.


 ORS 246.565

### Analyze supply and postage needs

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Inventory and order envelope stock:

- 1 Review envelope needs annually.
  - Allow a minimum time frame of 3-4 months prior to an election for ordering and receiving envelope stock.
  - Consider conferring with other counties for a group purchase to reduce printing costs.
  - Consider elections that may require oversize envelope stock.
- 2 Military/Overseas envelopes.
  - Available from the Secretary of State (forms SER 171 and SER 172).
  - Refer to the Federal Voting Assistance Program for oath and envelope design.
- 3 Window envelopes.
  - Without tax wording.
  - With tax wording as required by ORS 250.037(4) and 250.038.
  - With or without postal indicia.
- 4 Return identification envelopes.
  - Consider providing space for the residential address to be printed above the signature line for the voter to confirm their residential address is accurate.
  - Consider providing space for the voter's name to be printed below the signature line.
  - Consider adding ballot return instructions on envelope.
  - Consider adding reminder of when ballot must be received (i.e. voted ballot must be received by 8 pm on Election Day or it will not be counted).

 See Mailing Preparation and USPS Coordination on pages 21-24 and Issuing Ballots on pages 25-26.

# Election Personnel, Facility Management and Supplies (cont.)

## Before filing deadline

### Supply ordering and delivery

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Anything you can do in advance of the filing deadline should be done.

- 1 Mailing supplies should be ordered and received.
- 2 Outgoing ballot envelopes:
  - Envelope size may differ between elections (larger and/or extra weight may mean more postage; may also impact the inserting capabilities at the mailing house).
- 3 Incoming ballot envelopes:
  - Secrecy
  - Return identification

## NLT 30<sup>th</sup> day before election

### Establish official dropsites for ballot deposit

---

-  See Official Ballot Dropsites on page 9.

## NLT 10 days before election

### In addition to regular staff, appoint needed persons to serve as elections personnel

---

Immediately after the appointment of elections personnel for processing ballots the county elections official shall:

- 1 Prepare a list of any persons that will participate in the ballot processing. The list should include the person's party affiliation and be updated as needed.
  - Confirm personnel are not a candidate listed on the ballot (other than an incumbent candidate for county clerk), or a relative of a candidate on the ballot in that particular election. Relative is defined as:
    - ✓ spouse
    - ✓ child
    - ✓ son-in-law
    - ✓ daughter-in-law
    - ✓ parent
    - ✓ mother-in-law
    - ✓ father-in-law
    - ✓ sibling
    - ✓ brother-in-law
    - ✓ sister-in-law
    - ✓ aunt
    - ✓ uncle
    - ✓ niece
    - ✓ nephew
    - ✓ stepparent
    - ✓ stepchild
- 2 Make the list available for public inspection in the office upon request.
- 3 Administer an oath to such personnel.

-  ORS 254.476






# Security

**By January 31<sup>st</sup>  
of each year  
and within one  
business day of  
any change**

## Analyze security needs

---

To the greatest extent possible, security plans should consider possible emergency circumstances and course of action.

-  Security plans are exempt from disclosure under the public records law.
- 1 Prepare an overall Security Plan and file it with the Elections Division.
- 2 Establish a written agreement for security measures with any vendor handling ballots.
- 3 Design security for:
  - Periods of ballot transportation (e.g. from print shop to location of insertion; from mailing house to Post Office and from Post Office to elections office other than regular mail delivery).
  - Ballots during scanning and/or processing.
  - Ballot dropsites.
- 4 Establish guidelines for security involving observers.
- 5 Review office work area, building and ballot storage to assure security (alarms, cameras, special keys, limited keys).
  -  Ballots must be stored in secure area not accessible to the public.
- 6 Review security for:
  - Vote tally systems
  - Computer access security
  - Off-site storage for system backups
- 7 Consider having a backup county with the same ballot counting capabilities (may want to exchange backups of the election set-up).
- 8 Establish post-election ballot security.
- 9 Provide the number and location of all video surveillance cameras within the elections office.
-  Any change in a Security Plan must be submitted to the Elections Division.
-  See Appendix 2, Sample Security Plan.
-  ORS 254.074 and 192.502(31)

**Before election**

## Establish security

---


Security protocols shall be established to ensure:

- 1 Adequate supervision is provided during all processing activities.
- 2 Only authorized personnel have access to secure areas.
  - Use a log to maintain who has access (keys, electronic codes, etc.) to secure areas.
  - To prevent unauthorized access an option is to install secondary locks accessible only to authorized elections officials for election-specific dates.

## Security (cont.)

### Before election

- 3 Ballots are maintained in a secure location at all times in accordance with the security plan filed with the Secretary of State.
  - If a secure room is not available, then ballots need to be secured in locked or sealed ballot container.
  - If the ballots are kept in a separate locked room, it is not necessary to seal the transport carriers.
  - If ballots are being transported within the same building, it is not necessary to seal transport containers.
  - Use disposable numbered locks if available.

 Use of motion detectors, video cameras, alarm systems and other technology may be appropriate supplements to locks.

### Dropsite security

---

#### The county elections official:

- 1 Develops and files a new or amended dropsite security plan with the Secretary of State.
- 2 Establishes times that dropsites are available.
  - A dropsite can be opened on the first day ballots are mailed, but at a minimum must be open to the public beginning on the Friday preceding the election, during the normal business hours of each location.
  - On Election Day dropsites must be open 8 hours or more and until 8 pm.
- 3 Establishes procedures for overnight security of ballots with dropsite personnel.
  - Options include:
    - ✓ Using a room that will be locked
    - ✓ A vault

#### A ballot drop box located at an official dropsite must be:

- 1 Locked or sealed and accessible only by authorized personnel or deputized staff.
  - The drop box must be transported only by election or deputized staff to elections facility on a schedule or as needed.
- 2 Secure from being moved or tampered with.
  - The box may be exchanged for a locked or sealed empty box on a schedule or it may be re-locked or re-sealed when emptied by authorized personnel.
- 3 At staffed locations (such as libraries, city halls, etc.) and located in view of on-site staff.

#### An outdoor mailbox for drive-by or pedestrian traffic must be:

- 1 Accessible only by key in possession of authorized personnel.
- 2 Emptied according to an established schedule or more frequently if necessary.
  - Transfer voted ballots in a locked or sealed ballot box, bag or pouch to the elections facility.

## Security (cont.)

### Before election

#### Establish supervision procedures and train staff

---

The county elections official:

- 1 Ensures all election personnel have received instructions regarding the requirements and guidelines for conducting an election.
- 2 Ensures all election personnel follow standardized procedures.
- 3 Ensures adequate staffing and space are available during the processing period.
- 4 Establishes and maintains a manageable supervisor/staff ratio for each election.

### During election

#### Maintain an audit trail

---

An audit trail must be maintained throughout the entirety of the election process.

- 1 Maintain all statistical information for each precinct. This must include the number of:
  - Ballot envelopes received
  - Ballot envelopes accepted
  - Ballot envelopes not accepted
  - Ballot envelopes rejected
  - Tallied ballots
- 2 Consider maintaining logs for different stages of ballot processing. Logs may include:
  - Election date
  - Precinct number or name
  - Number of ballots issued
  - Name, team number or person
  - Date and time processed (maintain for each time a precinct is processed)
  - Number of challenged ballots
  - Number of out-of-county ballots
  - Number of write-ins and duplicated ballots
  - Number of envelopes that do not contain a ballot
  - Number of envelopes containing more than one ballot
  - Number of provisional ballots counted and not counted

✓ ORS 254.074(3)





# Official Dropsites, Privacy Booths and Voting Assistance

## NLT 30 days before election

### Establish official ballot dropsites

---

The following criteria must be used when establishing dropsites:

- 1 A dropsite must be maintained at each county elections office
  - 2 Each county must have no less than 2 dropsites for every countywide election
  - 3 There must be at least one dropsite for every 30,000 active registered voters in the county
-  Consider concentrations of population, geographic areas, security and available funding when determining a dropsite location other than the county elections office or the County Courthouse.
-  ORS 254.470

### Designate placement of ballot drop box within a dropsite building


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The following must be considered in placement of the ballot drop box within the dropsite:

- Security
  - Voter convenience
  - Access for the physically disabled
  - Parking
- and**
- Public perception that dropsite is official and secure

### Ensure proper security measures are taken at all dropsites

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-  See Dropsite security on page 7.


## 30 days before election


### File dropsite plan

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A dropsite plan must include the number and locations of all dropsites and be:

- Filed with the Secretary of State 30 days prior to Election Day.
- Updated and filed with the Secretary of State if there is any change in the location of any dropsite after the original plan is filed.

-  See Appendix 7, Dropsite Security Plan Form.

-  OAR 165-007-0310

## Official Dropsites, Privacy Booths and Voting Assistance (cont.)

### Before election

#### Notify the public of official ballot dropsites

---

- 1 Publicize dropsite locations and hours of accessibility for each site.
  - Counties may consider posting on the county website their dropsite locations.
- 2 Ensure dropsites are designated with official signage.
  - Only signs worded as follows should be posted at each dropsite:
    - ✓ Official Ballot Drop Here
    - ✓ Official Ballot Depository
    - or
    - ✓ Official Ballot Dropsite
  - ❗ It is recommended that traditional Vote Here signs not be used to designate dropsites.
- ❗ Only personnel authorized by the county elections official may collect voted ballots within 100 feet from any ballot dropsite.

#### Designate personnel to transport ballots

---

- 1 Designate personnel authorized to pick up ballots from dropsites.
  - Only authorized personnel may transport the ballots to the elections office.
  - If more than one person is used, it is recommended that they are of different political parties.
- 2 On Election Day, ensure authorized personnel are available at dropsites to determine that everyone in line at 8 pm is allowed to deposit their ballot.
- 3 Consider transporting ballots by law enforcement personnel or deputized personnel.

#### Instruct personnel

---

Review procedures with dropsite personnel to:

- Ensure security of ballots at all times
- Only accept ballots once a secure ballot drop box has been delivered to the dropsite
- Ensure overnight security of ballots and follow the established procedures

#### Determine the frequency of ballot pick-up from dropsites

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Daily ballot pick-up is recommended to minimize the number of ballots left overnight at dropsites.

### When ballots are issued thru Election Day

#### Establish voting booths

---

For each election every location where ballots are issued:

- Establish at least three suitable compartments, shelves or tables at which electors may mark their ballots.
  - ✓ The arrangement of the compartments, shelves or tables ensures that the elector may conveniently mark their ballot with **absolute secrecy**.
  - ✓ The compartments, shelves or tables must be available the entire time that ballots are issued.

✓ ORS 254.472

## Official Dropsites, Privacy Booths and Voting Assistance (cont.)

### Before election

#### For primary and general elections

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- 1 The county elections official is required to maintain additional voting booths as follows:
  - In counties with more than 35,000 active electors, at least one voting booth must be established for each 20,000 electors.
  - All other counties must provide at least one voting booth.
- 2 The county elections official determines voting booth locations.
- 3 Each location with a voting booth must also be a designated dropsite.

✓ ORS 254.474

#### Plan for assisting voters with disabilities

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- 1 Upon request, an elector is entitled to receive the assistance of two persons of different political parties or by some other person chosen by the elector.
  - A person may not assist an elector if the person assisting is:
    - ✓ An employer of the elector or an agent of the employer
    - or
    - ✓ An officer or agent of the union of which the elector is a member
- 2 Upon request from an elector, the location where the elector would like election personnel to assist is negotiable. Possible locations depend on the individual elector's need and include:
  - Voter's home
  - Elections office
  - Dropsite location
  - Community service center
  - Senior center or assisted living facility

✓ ORS 254.445

#### Educate voters

---

- 1 The county elections official shall make every reasonable effort to acquaint electors with the ballot format to be used in the election and the methods used to mark ballots to cast a valid vote.
- 2 Counties may provide the Elections Division with written voter education materials or a website link to your county elections website for posting on the Secretary of State's website.

✓ ORS 254.071

# Voter Registration

## Ongoing

### Process voter registrations, voter updates and automatic voter address updating

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#### Counties must:

- Date stamp cards on the date received on the top right-hand side of the registration card.
- Transfer between counties within 5 days.
- Perform routine voter file maintenance throughout the year.

#### Counties may:

- Update a voter's address information without a signature from the elector if:
  - ✓ They have received evidence that the address has changed
  - and**
  - ✓ They are confident it is from the voter or USPS

**!** If a person registering to vote alters any information printed on a registration card regarding the indication that the person is a citizen of the United States or the signature statement in which the person attests to the person's qualifications as an elector and the information supplied on the voter registration card the county elections official is prohibited from registering the person.

**✓** ORS chapter 247, 247.125, 247.292-247.295

### HAVA requirements

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HAVA requires new registrants in the State of Oregon provide identifying information to be eligible to vote on federal offices. The registrant must provide the applicable identifying information:

#### If they have a current, valid Oregon DMV Driver's License or Identification Card

- Their Oregon DMV Driver's License/ID number
  - i** The license or ID number must be current and valid.
    - ✓ A suspended license **is valid**
    - ✓ S revoked license **is not valid**

#### If they do not have a current, valid Oregon DMV Driver's License or Identification Card

- The last four digits of their Social Security number
  - !** The registrant must affirm that they do not have a valid Oregon Driver's License/ID number by selecting the appropriate box.

#### If they do not have a current, valid Oregon DMV Driver's License/ID or a Social Security number and are registering by mail

- A current and valid photo identification **that shows their name**
  - i** If an expiration date is provided on the photo identification that identification must not have expired.
- A current utility bill, bank statement, government check, paycheck or other government document **that shows their name and address**
  - i** The address listed must match the residence or mailing address submitted on their voter registration card.
- or**
- Proof of eligibility under the Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA) or the Voting Accessibility for the Elderly and Handicapped Act (VAEH)
  - !** The registrant must affirm that they do not have a valid Oregon Driver's License/ID or a Social Security number by selecting the appropriate box.

**Q** See Appendix 11, Sample HAVA Identification Letters.

## Voter Registration (cont.)

### Ongoing

#### Ensure that effective date of registration is accurate


---


A voters registration is effective the date the completed registration card was received (date stamped) by:

- A county elections office
- Secretary of State's office
- or
- A designated state agency listed in OAR 165-005-0055

A registration card that has missing information or an unintentional scrivener's error can affect the effective date of a voter's registration. If the registration card is:

- 1 Missing a date of birth, contains an incomplete date of birth or an unintentional scrivener's error and the missing information is obtained or the error corrected, the voters registration is effective on the date that registration would have occurred if the registration card had been complete.
- 2 Missing the answer to the question "Are you a citizen of the United States of America? " Attempt to contact or send a notification to the voter to come in to complete or fill out a new registration card by Election Day and prior to issuing a ballot.

 In the case of a currently registered voter active or inactive this minimum requirement does not apply.

 ORS 247.012(3)(c), OAR 165-005-0055

#### Determining voter qualifications as it pertains to residential address – new registrations or updates

---

After receiving a complete registration card the county elections official must determine if the voter is qualified to register to vote. Qualifications are:




- 1 US citizen
- 2 At least 17 years old
- 3 Oregon resident
  - A person's residence must be the place in which habitation is fixed and to which, when the person is absent, the person intends to return. Some factors to consider in determining residence include:
    - ✓ Where the person receives personal mail
    - ✓ Where the person is licensed to drive
    - ✓ Where any immediate family members of the person reside
    - ✓ The address from which the person pays for utility services
    - ✓ The address from which the person files Federal or state income tax returns

If the county elections official determines that the registration should not be accepted because of ineligibility:

- 1 A notice that more information is required should be promptly sent to the person.
- 2 If the person does not respond, a rejection notice is sent.
- 3 The person whose registration or update to a registration is rejected may apply to the county elections official no later than the 10th day after the rejection notice to request a hearing.

## Voter Registration (cont.)




### Ongoing

- 4 The county elections official has 10 days from the receipt of the application for a hearing to notify the applicant of the place, date and time of the hearing.
  -  The hearing must be scheduled no sooner than the 2nd and no later than the 20th day after this notice is given. If nothing is received, no action is required.
- 5 At the hearing, the applicant may present evidence of qualification. If the county elections official determines that the applicant is qualified, the registration should be processed.
  -  See Appendices 12, 12a, 12b and 12c, Sample Voter Registration Inquiry Letters.
  -  ORS 247.035(1)(a), 247.035(3), 247174(3)

### Inquiring into validity of current registrations



---

The county elections official may inquire at any time into the validity of the registration of any elector.

- 1 If the county elections official determines there is a need to question a person's registration, the county elections official mails a written statement to the elector that describes the nature of the inquiry and provides a suitable form for reply.
- 2 Not later than the 20th day after the date of mailing the statement, the elector, in writing, may state that the information on the registration card is correct, or fill out a new registration card.
- 3 If the county elections official determines that the inquiry has not been satisfied, the county elections official will schedule a hearing and mail a notice to the elector of the date, time and place.
  -  The hearing must be scheduled no sooner than the 2nd and no later than the 20th day after this notice is given.
- 4 At the hearing, the elector may present evidence of qualification. If upon conclusion of the hearing, the county elections official determines that the registration is not valid, the registration shall be cancelled.
  -  See Appendices 12c and 12d, Sample Voter Registration Inquiry Letters.
  -  ORS 247.195

### Registration between counties

---



- 1 Moving from one county to another within Oregon is a registration update.
  - To avoid creating duplicate voter registration records in OCVR all registration records processed need to be searched statewide for any potential duplicates.
  - All potential duplicates need to be carefully compared for similar names, dates of birth and signatures.
- 2 After receiving evidence a voter moved out of the county, the county elections official may inactivate the voter's registration.
  - If the voter updates their registration information to the new county, the voter is automatically included in the new county's eligibility pool.
    -  If a voter has already cast a ballot in their previous county during the course of an election, the new registration card may be processed but for eligibility purposes, the voter is only be included in the county where the ballot was counted.
  -  ORS 247.007(3), OAR 165-007-0130

## Voter Registration (cont.)

### Ongoing

#### Updating registrations based on written evidence from USPS, other county office or voter confirmation card

---

- 1 Whenever there is evidence that an elector needs to update their registration, the county elections official shall inactivate the registration and mail a written notice (Voter Confirmation Card (VCC)) to the elector.
  - 2 The notice must be forwardable, include a pre-paid postage return card and state:
    - The elector should return the card promptly.
    - If the card is not returned by the voter registration cut-off (21st day), the elector may be required to re-register.
    - The elector's registration will be cancelled if the elector neither votes nor updates the registration through two general elections.
  - 3 Upon return of the Voter Confirmation Card, the elector's registration can be updated, does not apply to name changes.
-  If the information received is from the postal service, the elector or another county elections official, the elector's registration should be updated and a Voter Notification Card (VNC) sent.
-  ORS 247.013(6)(b), 247.563(2)(e)


#### Consider NCOA update with USPS or possible mass registration confirmation

---

- These processes are not required but should be considered to help keep registration files updated.
- Under Oregon election law the Secretary of State subscribes to the USPS change of address service. If it is determined that there are differences in the address from the USPS and OCVR records of an elector the Secretary will provide to each affected county the information obtained from the change of address service.

#### Consider updating of address files with zip-plus-4 intelligent mail barcodes – CASS Certification

---

-  See Zip-Plus-4 on page 21.

### March of even numbered year

#### Mail nonaffiliated voter (NAV) notice if major political party opens primary election

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- Major political parties must notify the Secretary of State no later than the 90th day if they intend to open their primary to nonaffiliated voters.
- The Secretary of State will inform counties no later than the 85th day before the primary election whether any party has opened its primary.
  - Follow procedures in OCVR for tracking NAVs requesting major party ballots.


-  ORS 254.365(3)(a)

### NLT 61 days before election

#### Inactivate and notify voters who have not had any activity during the prior 5 years

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The registration of an elector shall not be moved to an inactive status due to no activity during the 60-day period before an election in that county.

-  ORS 247.013(6), 247.013(7)

## Voter Registration (cont.)

### 21<sup>st</sup> day before election

#### Deadline for new voters to register


---


To vote in an election, a new registrant's card must be:

- Postmarked no later than the 21st day immediately preceding the election
- Received by the county election official or designated state agency listed in OAR 165-005-0055 no later than the close of business on the 21st day prior to the election if submitted by a voter registration drive

or

- Received by 11:59 pm on the 21st day before the election if submitted using the online registration system

-  This only applies if the voter is not currently registered in Oregon. With OCVR, moving from one county to another within the state is an update to the voter's registration, not a new registration.

-  ORS 246.021(4)(a), 247.021(3)(b), 247.012(3)(c), OAR 165-005-0055


### 21<sup>st</sup> day before primary election


#### Last day to change party affiliation and last day for NAVs to request a major party ballot except as noted below

---

- Postmarks **do** apply for valid party affiliation updates.

- Postmarks **do not** apply for NAV ballot requests.

-  Nonaffiliated voters must request a party ballot who has chosen to open their primary election no later than 5 pm the 21st day prior to the primary election.

-  ORS 254.365 (3)(a), 254.470(3)(c)



# Observers

## Ongoing

### **Provision is made to allow for attendance by observers during all ballot processes**

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Members of the public may observe all ballot processes except confidential election processes such as the challenged ballot process.

#### **The county elections official:**

- Will determine the number of observers allowed at any given time based on space and staff availability.
- May add additional restrictions as needed.
- May conduct tours and/or access to the public for educational and/or media purposes, not classified as official observers.

🔍 See Appendix 1, Sample Observer Rules.

✓ ORS 254.415-254.426, 254.482

## Printing Ballots and Other Election Related Materials

**95<sup>th</sup> day before  
primary and  
general election**

### Generate special absentee ballots

---

Utilize the Open Offices list available on the Secretary of State's website [oregonvotes.gov](http://oregonvotes.gov) to prepare the special absentee (submarine) ballot.

✓ ORS 253.565

**NLT 84 days  
before primary  
and general  
elections**

### Arrange with printer for voters' pamphlet production

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The Secretary of State sends a memo to each county asking if the county will be producing a voters' pamphlet.

The county must notify the Secretary of State of their intent to publish or not publish a county voter' pamphlet. If not producing a voters' pamphlet the county is asked to provide a list of local offices that will be open at the election. A county may:

- 1 Publish a county voters' pamphlet and distribute it themselves (either by mail or with official ballots). If this option is chosen, pamphlets must be distributed not later than the last day to mail ballots to voters.
  - If inserting county voters' pamphlet with the ballot, consider:
    - ✓ Postage costs
    - ✓ Limitations for the inserting machines
    - ✓ Delivery deadlines to accommodate mailing house or in house insertion
    - ✓ Printing may be completed later than ballot printing and closer to mail out date
  - If mailing separately, consider:
    - ✓ There will be additional cost in postage
    - ✓ Timing of voters' pamphlet delivery must coincide with ballot delivery (ideally, voters' pamphlet should be delivered one week prior to mailing of ballots)
    - ✓ Give deadlines to printer that allows for timely delivery to Post Office
- 2 Publish a county voters' pamphlet and have it inserted in the state voters' pamphlet. This option is only available at an election for which the Secretary of State is required to publish a pamphlet.
  - If combining with state voters' pamphlet, consider:
    - ✓ County's time frame must meet State's deadlines
    - ✓ Give to printer allowing for timely delivery to State
- 3 Not publish a county voters' pamphlet. Certain local candidates and measures would then be eligible to be included in the state voters' pamphlet.

ⓘ Consider preparing a voters' pamphlet type of publication for military and overseas voters or prepare a notice to be inserted with ballots for military and overseas voters, which directs them to state or county websites to obtain voters' pamphlet information.

! Voters' pamphlet arguments and candidate statements are exempt from public review until the 4th business day after the filing deadline for materials.

✓ OAR 165-007-0030

**Before filing  
deadline or  
ASAP**

### Arrange with printer for ballot printing

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- 1 Advise vendor of possible ballot quantities and the number of variations (ballot styles).
- 2 Consider possible weight limitations (printing instructions back-to-back will reduce the amount of paper and overall weight of the mailing).

## Printing Ballots and Other Election Related Materials (cont.)

### Before filing deadline or ASAP

- 3 Consider different colors for different ballot types or districts.
  - At the primary election, you may print ballots for the major political parties in different colors. If a county chooses to print their major party ballots in color:
    - ✓ Yellow shall be used for the Republican ballot
    - ✓ Green shall be used for the Democratic ballot
- 4 Include required information and warning per ballot type. Information to be printed on each ballot shall include:
  - Instructions to voter
  - What to do if you make a mistake
  - Warning required by ORS 254.470(5)
  - and**
  - Vote both sides of ballot (if appropriate)
- 5 For primary election, analyze the number of nonaffiliated voters (consider buffering ballot quantities to accommodate for party changes or parties opening their primary).
  - The Secretary of State will notify counties if a major political party chooses to open their primary election to nonaffiliated voters.
- 6 Determine process for issuing precinct committeeperson ballots and for issuing major party ballots to NAVs, if applicable, for a primary election.

✓ ORS 254.115 – 254.195, 254.470

### Before or NLT filing deadline

#### Set up election in computer system

---

Use Secretary of State's random alphabet list for candidates provided in the certification document or in OCVR.

! During a primary election major parties and NAVs are coded in OCVR.

✓ ORS 254.155, OAR 165-010-0090

### NLT 61 days before election

#### Certify to other counties joint district and city filings

---

If an office or measure will appear on more than one county ballot the filing officer:

→ Certifies the office or measure within OCVR

**and**

→ Notifies in writing the other county elections officials of the office or measure that was shared.

! As measures are filed publish receipt of ballot title and for a district measure also publish notice of measure election. This provision is only required for county and district measures as cities and the state publish their own notices.


✓ ORS 250.195, 255.155


## Printing Ballots and Other Election Related Materials (cont.)

### Filing deadline

#### Order ballot styles

---


- 1 Order quantities to accommodate NAVs if a party opens primary to include NAVs.
  -  NAVs cannot vote on precinct committeepeople or any other offices excluded by the political party.
- 2 Consider extra quantities for voters who update their registration information between the 21st day prior to the election and Election Day.
- 3 Some printing concerns to remember:
  - Do not split a contest between two columns or pages, indicate clearly when to vote both sides of the ballot.
  - Don't forget required information, instructions on how to mark your ballot and warning required by ORS 254.470(5).
  - Minimum ballot printing requirement for measures is measure number, caption and yes/no statements (for state measures) or caption and question (for local measures).
  - Complete ballot title and fiscal impact statements for state measures must be provided in ballot packet.
  - In the case of a recall election the following shall be printed on the ballot: the reasons for the demand, the justification and the question Do you vote to recall \_\_\_\_\_ from the office of \_\_\_\_\_ ? with the name of the person against whom a recall petition has been filed printed in the first blank space and the public office held by the person printed in the second blank space and yes/no statements.

 ORS 254.115 – 254.145, 254.195, 254.470

### Before printing

#### Proof everything

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 Proof again.

### ASAP after receiving printed ballots

#### Test ballot programming and ballot readability by running test ballots in each ballot-counting machine

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Test as soon as possible after receiving printed ballots. Consider using staff who will not be involved in conducting the actual test to mark the ballots.

-  Test all ballot styles.
-  Test all precincts.
-  Perform every function to be used on election night.
-  The test deck may include logic and accuracy sample.
-  See Preparatory Test on page 36.


## Mailing Preparation and USPS Coordination

### Before ordering envelopes

#### Have the USPS review or help design your outgoing and return envelopes to ensure they meet the necessary postal standards for automated handling

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- 1 Apply for non-profit indicia (imprinted permit number to show method of postage payment).
- 2 Discuss with USPS options for return mailing address for the voted ballots.
  - Your office address and zip plus 4
  - USPS assigns a special plus 4 for the elections office only
  - Use a Post Office Box
- 3 Evaluate outgoing and return envelope design with the USPS Mailing Requirements Section which will:
  - Review for or provide proper wording and placement of endorsements on your envelopes as they apply to USPS.
  - Provide camera-ready copy of the front side of both outgoing and return envelopes for the printer.
  - Provide the 11-digit barcode for your return address.
    - ✓ Does not include your logo which you will need to add.
  - Review the outgoing and return envelope sizes for postal rate conformity and the paper and ink colors for readability.
    - ✓ Measure the thickness to ensure it doesn't exceed .25 inches.
    - ✓ Consider using different colored bands or stripes on envelopes for different ballot types or different elections.
    - ✓ Inform USPS if you change return envelope colors for each election.
  - Assist in redesigning the return identification ballot envelopes to reduce the need for additional postage.

 Always have the USPS review and sign-off on the printer's Blue Line for the front side of your outgoing and return envelopes before they are printed. Keep this for your records.

 Use the USPS Election Mail Logo on all election-related materials.

### Before filing deadline

#### Identify and review mailing requirements

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- 1 Identify:
  - Timelines and scheduling (may want to allow for possible delays)
  - Staffing needs at all stages of the process (on-site supervision is required)
  - Staging requirements (work areas for bar-coding, tray assembly, zipping/sorting, etc.)
- 2 Review county security plan for compliance.
- 3 Establish method of addressing envelopes, such as:
  - Formatting voter and address information
  - Envelopes vs. labels
- 4 For inserts that may be needed, check with vendor on insert capability:
  - Secrecy envelopes/sleeve
  - Return and military envelopes
  - Ballot (one or more)
  - Text of ballot title or style if not printed on ballot
  - Local voters' pamphlet (if applicable)
  - Measure flyer
  - Map (if applicable)
  - and**
  - Dropsite information (if applicable)

## Mailing Preparation and USPS Coordination (cont.)



### Before filing deadline

#### Arrange with vendors to have supplies delivered

---

Ensure applicable supplies are ordered and delivered.

##### 1 Envelopes


- Does the election require oversize envelope stock?
  - ✓ Larger and/or extra weight may mean more postage.
  - ✓ May also impact the inserting capabilities at the mailing house.
- Does the election contain a bond, local option or permanent rate limit measure?
  - ✓ ORS 250.037 and 250.038 require the following tax increase notice be printed clearly and boldly in red: "Contains Vote On Proposed Tax Increase."
  - ✓ This only applies to property tax issues regarding bonds, local option taxes and establishment of permanent rate limitations. Does not apply to other revenue measures.
- Does the election contain a renewal of an existing local option tax?
  - ✓ The language on the outer envelope shall read "Contains Vote on Renewal of Current Local Option Taxes."
  - ✓ A measure renews a current local option tax if it is for substantially the same purpose and asks for a rate or amount that is equal to or less than the current rate or amount.
-  Required language is contained within the publication "Tax Election Ballot Measures " provided by the Department of Revenue.
-  If the weight of the returned ballot requires more than regular postage that information can also be printed on the same standard envelope as needed.

##### 2 Labels, if applicable for printing addresses for outgoing and/or incoming envelopes

##### 3 Local voters' pamphlets

##### 4 Other inserts such as dropsite locations

- Consider different colors for different inserts.

-  Ballots and voters' pamphlets cannot be ordered in advance, but your printing contract should be in place, including estimated quantities by this time.

### NLT 1 week after filing deadline

#### Coordinate with USPS

---

##### 1 Contact your local postal representative to coordinate election mailings.

- Coordinate with USPS (preferably with the postmaster of your county).
- Consider direct contact with all local Post Offices within your county for ballot mailing coordination.

##### 2 Discussions should include date, time and location for delivery of ballots to the Post Office.

- Provide date you will deliver ballots (and voters' pamphlets, if mailing your own) to the Post Office for mailing. Explain that these are statutory dates...not arbitrary.
  - ✓ Take into consideration the size (number of ballots) of the election, allowing for as much time as possible for processing the returned ballots.
  - ✓ Take into consideration holidays or three-day weekends so ballots won't sit in a mailbox over a long weekend.
- Coordinate time of ballot delivery.
  - ✓ The Post Office will schedule a time frame that allows for the immediate distribution of ballots.
  - ✓ If more than one county will drop their ballots at the same Post Office on the same date, it is important to coordinate the time of delivery for each.
- The location of where ballots are to be delivered.
  - ✓ The larger Post Offices sometimes require delivery to a specific dock area.
  - ✓ If delivery is by truck, the Post Office will require the truck to be weighed before the mailing is loaded (light) and again before off-loading the ballots (heavy).

## Mailing Preparation and USPS Coordination (cont.)

### NLT 1 week after filing deadline

- 3 Go over expected dates for delivery of ballots to voters.
- 4 Inform USPS:
  - Of date voted ballots must be returned to elections officials in order to be counted.
  - That if ballots are returned with insufficient or no postage, you will not accept them nor will you pay any postage due.
- 5 If a mailing house will be delivering the ballots directly to the USPS, advise the USPS of the mailing house you're using and the name and phone number of your contact at the mailing house.
- 6 Discuss steps you can take, if any, to make processing more efficient for the USPS.
- 7 To ensure everyone is on the same page send a follow up with a letter to the postmaster documenting your conversation and agreements.

### Coordinate with mailing house, if applicable

---

- 1 Establish method of addressing envelopes.
- 2 Discuss:
  - Timelines for providing addressing information
  - Information to be printed on the envelope/label
  - The format of the printed information on the envelope
- 3 Communicate legal mailing dates and your expectations from mailing house.
- 4 Discuss who will fold ballots and any additional inserts, if applicable.
- 5 Finalize ballot transportation security processes:
  - How will ballot transport security needs be met
  - From county office or vendor to mailing house
  - From mailing house to Post Office
- 6 Specify required quality control processes (tracking, audit trails) and level of communication between county and mailing house.
- ❗ Onsite supervision is required at all stages of the process.
- 7 Request any specifics from them that you may be able to provide that would make the addressing/mailing process more efficient for them.
- 8 To ensure everyone is on the same page send a follow up with a letter to the mailing house documenting your conversation and agreements.

### Before mailing ballots

#### Prepare mailing

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Provide the USPS with a Sample ballot packet for their inspection.

#### Barcode the mailing

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Consider barcoding outgoing Vote by Mail packets. The speed and efficiency of delivery for barcoded mail is greater than non-barcoded mail.

## Mailing Preparation and USPS Coordination (cont.)

### Before mailing ballots

#### Determine the number of mailings

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To qualify for bulk mailing, each mail piece must weigh the same as every other piece in the mailing.

- Packets with five inserts will weigh more than packets with four inserts, so there will be two mailings (one for packets of four and one for packets of five).

#### Use required forms and mailing profiles

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- Use current postal forms.
- If a mailing service is used, forms will be provided for you, but be sure that coordination with USPS has already occurred for acceptability of the forms.

#### Determine what postal supplies are needed

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Discuss when and what supplies will be needed for the mailing and arrange for pick-up. Supplies include:

- Trays, sleeves or sacks
- GPCs or pallets
- Labels, tags and stickers

-  If a mailing service is used, be sure to verify that the service will be providing all the needed supplies or can obtain them for you.

#### Give USPS a check for the postage accounts

---



There are two separate postage accounts that will need a deposit:

- Postage for the non-profit account to cover the outgoing postage
- Postage for the undeliverable account to pay for undeliverable returns

### Date ballots mailed **Coordinate a time with USPS to pick up the mail each morning**

---

Even if the return address is the elections office, you can arrange with USPS to pick up the voted/returned ballots each day. This will allow for earlier ballot processing.

-  The elections officer must arrange for the secure transport of ballots.
-  See Security on page 6.

### Before Election Day **Coordinate with USPS for pre-8 pm Election Day pick-up of ballots for your county**

---

- Counties may consider coordinating with the USPS for a pre-8 pm Election Day pick-up for all counties.
- It is necessary to coordinate with USPS for the latest pick-up time for last minute returns before 8 pm on Election Day.
- If your county contains a regional processing center and you do not have an election, consider coordinating with adjoining counties for an Election Day pick-up of their ballots.



## Issuing Ballots

**NLT 95 days before  
primary and  
general elections**

### Mail special absentee ballots

---

Mail the special absentee ballot (submarine ballot) to those military and overseas electors who have requested it.

✓ ORS 253.565

**45<sup>th</sup> to 18<sup>th</sup> day  
before election**

### Begin addressing process

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- 1 Addresses may be printed:
  - Directly onto the envelope
  - On labels
- 2 Addressing and inserting may be done:
  - Mailing house
  - In-house
  - 🔍 See Analyze space needs on page 3.
- 3 Address format on all return envelopes should contain the following:
  - Name
  - Mailing address
  - Residence address, if possible
  - Election date or code
  - Voter/ballot identification
  - Precinct number or name
  - Party code (Primary Election only)
    - ✓ The party code used may not disclose to the public what party the voter is affiliated with.
  - Style/format code
- 4 Consider color usage in the following areas (always consider USPS readability):
  - ✓ Ink color on envelope
  - ✓ Different colors for address labels
- 5 Consider using barcodes or OCR fonts for voter identification.
- 6 Use automated sorting of returned ballots (precincting) when possible.

**NLT 45 days  
before election**

### Mail military and overseas elector ballots

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- 1 Mail paper ballots if material from printer is not yet available.
- 2 Include form SEL 531 and information on returning voted ballot by fax or email.
- 3 Include the following statement with your military and overseas voter ballot packets in accordance with the MOVE Act:
  - In order to determine whether your ballot was received by your county election official please visit [oregonvotes.gov](http://oregonvotes.gov) and go to the My Vote button where you can track your ballot. Additional information for military and overseas voters is available at [oregonvotes.gov](http://oregonvotes.gov).

✓ ORS 253.045, 253.065, 253.510, 253.690

**NST 29 and  
NLT 14 days  
before election**

### Mail ballots to out-of-state voters

---

Consider using First Class postage to expedite delivery.

## Issuing Ballots (cont.)

**20<sup>th</sup> to 14<sup>th</sup> day  
before election**

### **Mail all remaining ballots on date previously arranged with USPS**

Maintain uniform timeframe for mail out.

✓ ORS 254.470(3)

**Ongoing and  
before election**

### **Include eligible registrations in mailing**

Check postmarks for eligible registrations and include in original ballot mailing.

- If possible, pull the original ballot from the mailing and send only the new ballot.
- If not possible, reissue a ballot and make appropriate entry in OCVR which alerts the county elections official that a reissued ballot has been sent and the original ballot has been inactivated.

i OCVR maintains a supplemental record and the original master record as they are updated.

Q See Deadline for new voters to register and Last day to change party affiliation on page 16.

### **Updated voter registrations**

- 1 Voters who update their information will automatically be issued a ballot.
  - Ballots are not required to be mailed after the 5th day before the election.
  - Verify previous registration and that the voter has not already voted in this or in another county (and for the Primary, is not changing their party affiliation).
- 2 At the voter's request, updates for voters out-of-state or out-of-country that would not have sufficient time to be mailed a ballot and returned by Election Day may be faxed or emailed their ballot with specific instructions how to return, provided there is sufficient time for the voter to mail back their ballot by Election Day.
- 3 When a voter updates for the purpose of a name change only, the voter may vote once under the previous name.
  - The county elections official may issue a replacement ballot at the request of the voter.

### **Ballot Issuing Based on Registration Status, within or between counties**

After processing the voter's updated registration, continue as follows:

- 1 If the voter was previously inactive issue a ballot.
- 2 If the voter was previously active and has not cast the original ballot issued from the previous county, issue the voter a ballot from the new county.
- 3 If the voter was previously active and has not yet voted in the current county reissue the voter a ballot.

Q If the voter was previously active and has voted in the previous county or a voted ballot is received by more than one county see Multiple Ballots on pages 42-43.

### **Presidential only, provisional , reissued, supplemental or replacement ballots**



Q See Special ballots on page 41.

# Reception, Signature Verification and Sorting

## After mailing ballots

### Receive voted ballots

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- 1 Ballots can be returned to:
  - Any Oregon county elections office
  - Any officially designated ballot dropsite in the state
  - Through USPS or other delivery service to the county elections office
- 2 When a ballot has been returned by the voter, it is included in the master list in OCVR for the election.
  -  The master list and logs for tracking reissued, replacement and challenged ballots are maintained in OCVR.
- 3 Reissued and replacement ballots must be identified to ensure only the correct ballot is being counted.
- 4 Challenged ballots should be stored separately during the election process.
  -  See Eligibility on page 47.

### Track ballot statistics

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At the time the elections results are certified in that county the staff at the elections office counts and records the number of:



- Ballots returned by USPS
- Ballots received over the counter
- Ballots received from dropsites
- Ballots forwarded to other counties
- Ballots returned unsigned
- Ballots returned by email
- Ballots returned by fax
- and**
- Ballots returned undeliverable

## Within 48 hours of receipt and NLT 3 business days after election

### Transfer return ballot envelopes belonging to other Oregon counties

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Minimum standards of recording any ballots received for other Oregon counties include:

- 1 Date stamping the date received on each return envelope or indicating if received on time or too late for election.
  - 2 Maintaining a log recording the date, county and number transmitted.
  - 3 Faxing or emailing the other counties of method of delivery and number of ballots being transferred.
  - 4 Mailing or delivering voted ballots (such as UPS, Priority Mail, FedEx, Click N Ship, etc.) with notification to the home county.
    -  All voted ballots delivered to a county must be forwarded as soon as possible but no later than the 3rd business day following the election.
-  Other states' ballots cast by Oregon voters in other states must not be counted in Oregon. Take no action on these ballots.

### Precinct Sort

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If a vote tally system requires sorting to produce results by precinct, sort return identification ballot envelopes by precinct prior to opening, inspecting and tallying the ballots.

## Reception, Signature Verification and Sorting (cont.)

### After mailing ballots

#### Check for valid signatures

---

- 1 When a ballot has been returned by the voter the signature on the return identification ballot envelope is compared to the signature on the voter's most current registration card.
  - ⓘ If the return identification ballot envelope is unsigned the ballot is only accepted if the elector signs the envelope within the special ballot challenge period. See page 47.
- 2 If the signature does not match the most current registration card review all signatures contained in the registration record in OCVR to determine the validity of the signature.
- 3 If the signature verification clerk is able to determine that the same person signed the return identification ballot envelope with a voter registration record that has been scanned into OCVR, the ballot may be processed.

#### Evaluating Signatures

---

The following characteristics and procedures shall be utilized by a county or state elections official to evaluate signatures to determine whether the signature matches or does not match the signatures contained in the state voter registration record:

- 1 Agreement in:
    - Style and general appearance
      - ✓ Basic construction
      - ✓ Skill
      - ✓ Alignment
      - ✓ Fluency
      - ✓ General uniformity and consistency between signatures
    - Proportions of individual letters
      - ✓ Height to width
      - ✓ Heights of the upper to lower case letters
  - 2 Irregular spacing, slants, or sizes of letters are duplicated in both signatures.
  - 3 General traits and agreement of the most distinctive, unusual traits of the signatures.
  - 4 Only a signature possessing obvious and predominantly matching characteristics with the signatures in the voter registration record may be reviewed and determined to be a match by a single county elections official.
  - 5 A signature possessing one or more distinctive dissimilarities from the signatures in the voter registration record shall be reviewed by at least two different county elections officials before it is accepted as a matching signature or rejected as a non-matching signature.
  - 6 A single distinctive trait is insufficient to conclude that the signatures are by the same writer. There must be a combination or cluster of shared characteristics. Likewise, there must be a combination or cluster of dissimilarities to conclude that the signatures may be by different writers.
  - 7 When evaluating signatures elections officials may review broad characteristics used to evaluate an entire signature as a unit or they may narrow the scope of their examination to that of specific letters within a signature.
- ⓘ See Appendix 13, Evaluating Signatures, for a list of characteristics for consideration when evaluating an entire signature as a unit and a list of characteristics for consideration when narrowing the scope of the examination to specific letters or combinations of letters.

# Opening Return Identification Ballot Envelopes

## NST 7 days before election

### Begin opening the return identification ballot envelopes

---


Once signature verification is completed and ballots have been sorted, begin opening the return identification ballot envelopes.


- 1 Process ballots from only one precinct or batch at any one workstation at a time.
- 2 OCVR will keep a record of the number of return identification ballot envelopes accepted.  
→ Counts may be automated if sorting equipment is being used.
- 3 Once the ballots have been removed from the return identification envelopes count the ballots.  
→ The total should match the OCVR total.
- 4 May begin scanning ballots if the county has received approval from the Secretary of State as required in OAR 165-007-0310.

### Staffing

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Election personnel opening envelopes, preparing ballots for counting and tallying votes may not be a candidate who is listed on the ballot or a relative of a candidate on the ballot in that particular election.

 See Election personnel on page 3 for definition of relative.

- 1 Each board member must sign an oath prior to processing ballots at each election.
  - 2 Opening boards must be composed of a minimum of two members, not all of the same political party.
  - 3 A record must be maintained of all board members, including each member's:
    - Political party affiliation
    - Oath
    - Board assignments
    - ✓ Consider maintaining a log of which boards process which precincts or batches.
-  The county elections official must provide written procedures and training prior to each election to ensure consistent application of state and local policies regarding all aspects of ballot processing – receipt, signature verification, opening/inspecting and tally.


### Opening Boards

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-  There shall be no lead pencils or blue or black pens at any table where election workers are opening ballots or are working with ballots that have been removed from their envelope.
  -  The only writing devices that are permitted at a table are those with a distinctive marking color that is not commonly used by voters on ballots.
- 1 Process one precinct or batch at a time at any one workstation.
  - 2 Open the return identification ballot envelope and remove the secrecy envelope containing the voted ballot.
    - If the return identification ballot envelope was sealed or unsealed and contains a ballot with or without a secrecy envelope, continue processing while maintaining the secrecy of the ballot.
    - If there is another signed return identification ballot envelope inside (with a ballot inside of it), remove and forward inner return envelope to be logged and examined as a separate returned voted ballot.

## Opening Return Identification Ballot Envelopes (cont.)

### **NST 7 days before election**

- 3** Open the secrecy envelope and remove the voted ballot.
    - If there is no ballot enclosed, log as an empty ballot envelope or refer to the election supervisor for instructions.
    - If the ballot is from a different election, reject the ballot.
    - If there are two ballots enclosed in one envelope and only one signature on the return identification envelope reject both ballots.
  - 4** Place rejected ballots in the appropriate envelope/container.
-  If other material or notations are included on or with the returned ballot and have a bearing on the vote cast, attach the material to the ballot and send to the duplication board.

# Ballot Inspection Process

## NST 7 days before election

### Ballot inspection board

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- ❗ There shall be no lead pencils or blue or black pens at any table where election workers are opening ballots or are working with ballots that have been removed from their envelope.
- ❗ The only writing devices that are permitted at a table are those with a distinctive marking color that is not commonly used by voters on ballots.
- 1 The object of ballot inspection is to ensure:
  - All ballots are machine-readable.
  - Voter's actual vote will be recorded accurately.
    - ✓ If the ballot has damage or defects that would cause problems in tallying, duplicate as directed in this rule.
  - ⓘ In all cases inspection boards must determine whether ballots should be counted, rejected or duplicated.
- 2 Inspect all ballots to determine voter intent.
  - The responsibility for determining voter intent lies with the inspection board, under the supervision of the county elections official.
  - Ensure that a team of at least two board members of differing political parties work together to determine voter intent.
    - ⓘ In counties using digital vote tally systems, ballot inspection and resolution is performed on a computer. A team of at least two board members of differing political parties is still required to work together to determine voter intent.
- 3 Any extraneous marks, such as names, signatures or initials of the voter should be disregarded unless they have a bearing on the vote cast.
  - ❗ Ballots shall be rejected if a write-in is voted using a rubber stamp, sticker or another marking device, except writing which bears the name of a person and is used to vote for a person whose name is not on the printed ballot.
- 4 If ballots are counted by precinct, process ballots one precinct at a time at any one workstation.
- 5 All rejected ballots must be accounted for on log sheets or as directed by the county elections official and placed in the appropriate envelope/container.
- 🔍 See guidelines for staffing in the Opening Return Identification Ballot Envelopes section on page 29.
- ✓ ORS 254.470(8), 254.505

### Inspecting

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- 1 Check for questionable marks and write-in votes during the same inspection. Questionable marks are:
  - Marks that cannot be read by the ballot tally equipment
  - A checkmark or an X in the voting area
  - Voting area completed too lightly
  - Voter's choice not marked in the voting area
  - Extraneous marks made in the header code, clock areas or other scanned areas
  - Marks indicating the voter's change of mind; and/or
  - Comments marked in the voting area

## Ballot Inspection Process (cont.)

### NST 7 days before election

- 2 Inspect entire ballot and sort into appropriate stacks:
  - Clearly marked machine-readable ballots (they can be placed in the container, ready for tallying)
  - Ballots with questionable marks
  - Ballots with write-ins with oval or box not completed
  - Ballots that can be enhanced
  - Ballots that must be duplicated

### Determining voter intent

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- 1 If the inspection board agrees on the voter's intent, the ballot should be enhanced or duplicated in the manner reflecting the voter's intent and the enhanced or duplicate ballot tallied.
  - If it is possible to enhance the ballot, use the enhancement process.
  - If enhancement is not possible, duplicate the ballot.
- 2 If the inspection board cannot determine the voter's intent, the ballot should not be duplicated but processed as is.
  - ❗ Voter intent in any single contest may not be determined based upon a pattern of partisan voting on the ballot.
- 3 If a separate note is included in the return identification ballot envelope or written on the ballot label and it indicates a change the person wishes to make in voting and computer enhancement/resolution is not an option.
- 4 Any time a note is utilized to determine voter intent, the ballot must be duplicated.
  - All received parts must be assigned a tracking number and kept in the event of a recount.
- 5 Follow instructions for duplicating a ballot to reflect the intent of the voter.
  - Place duplicate number on all associated pieces.
  - Store together in the appropriate envelop/container.
- 6 If a note is included that is not relevant to voter intent, do not retain the note.

✓ ORS 254.505

### Enhancing

---

Questionable marks may require that the ballot be duplicated/enhanced.

- 1 Election personnel process the ballots to be enhanced making them machine-readable and reflecting the voter's intent by:
  - Placing enhanced mark on the ballot, ensuring that the ballot can be identified as enhanced.
  - Marking the voting area in a manner instructed by the county elections official for questionable marks.
  - Placing enhancement, when appropriate, over questionable marks that affected ballot readability (must be removable for recount purposes).
- 2 Enhanced ballots are added to the ballots in the container ready for ballot counting.




## Ballot Inspection Process (cont.)

### NST 7 days before election

#### Machine-rejected defective ballot resolution

---

- 1 Machine-rejected ballots are defective ballots that are not machine-readable, including:
  - Ripped or torn ballot
  - Ballot voted with an instrument that cannot be read by the machine
  - Ballot with extraneous marks within the read head path
- 2 These ballots are out-stacked while the machine is in standard tally mode and may not have been previously caught by inspection boards.
- 3 Ballots that are not machine-readable must be re-inspected.
  - The inspection process should consist of at least two election board members, each of different political parties.
- 4 If the vote tally system requires sorting by precinct at any one workstation, then elections personnel will only inspect one precinct of unread defective ballots at a time.

 See Enhancing on page 32 and Duplication on page 33.

#### Duplication

---

- 1 Duplication boards, regardless of the vote tally system used, process ballots requiring duplication, making a duplicate ballot that is machine-readable and reflects the voter's intent.
  - Duplicating and proofing must be done by at least two election personnel who are members of different political parties.
  - Each worker must initial both ballots.
  - If the county elections official uses duplication teams with unique team identification numbers both the original defective ballot and the duplicated ballot must have the team's identifying number on it.
  - The county elections official must keep a record of each team identifying number and must clearly record the name of each team member.
- 2 Sort by ballot style if there are multiple ballot styles for the precinct.
  - Select the appropriate blank ballot style that matches the ballot to be duplicated.
- 3 Clearly indicate on the ballots which ballot is the defective original ballot and which ballot is the duplicate ballot.
  - Do not place Duplicate stamp in read head path or voting area.
- 4 Assign a matching number to the original and duplicate ballot and to any other material bearing on voter intent.
  - The number can only be used once in a given precinct (unless sorted by batch).
- 6 If other material is included with the ballot or is attached to the secrecy envelope, inspect to determine if it has bearing on voter intent.
  - If the material has bearing, duplicate the ballot as necessary and place original ballot and the material in the appropriate envelope/container for that precinct.
  - If the material has no bearing, discard the material.
- 7 One board member or team duplicates the entire ballot accurately reflecting the voter's intent and initials both ballots.
- 8 The second board member or team proofs the duplicate ballot against the original defective ballot, initials both ballots and places the original defective ballot in the appropriate envelope/container for that precinct or batch processing.

## Ballot Inspection Process (cont.)

### NST 7 days before election

9 The duplicate ballot is added to ballots in the carrier for ballot tallying.

10 If it is necessary to duplicate a duplicated ballot because the duplicate ballot becomes damaged, duplicate from the original ballot using the same tracking number. Use a control log to track the assigned numbers.

### Examples

Two (or more) voting areas have been marked and one mark has been erased, but enough residue is left that the scanner may read an overvote.



**Yes**



**No** (erasure has been done)

Enhance, resolve (white sticker) the erasure so that the scanner only detects one vote. Duplicate the ballot, if necessary, to reflect only the dark vote.

One response is indicated with a heavy line or dark oval and a second response is marked with a narrow line or pale oval, but no erasure has been attempted.



**Yes**



**No** (erasure has not been done)

Since there is no attempt to erase either mark, leave as is and allow scanner to tally as an overvote.

The voting area has been completed for one response and a dot or partially completed voting area is marked for the other.



**Yes**



**No**

Mark may or may not have some erasure— usually there is none. Enhance, resolve or duplicate the ballot to eliminate the overvote due to the partial mark or dot.

The voting area has not been marked, but the response is circled.



**Yes**



**No**


Enhance or duplicate the ballot by completing the voting area beside the circled vote.

Enhancement cannot permanently obscure the original marks of the voter. Sometimes duplication is necessary because the circle overlaps the voting area.

## Ballot Inspection Process (cont.)

### Examples

The voting area has not been marked but there is a connective line between the response and the voting area to indicate the vote.

 --- Yes

 Troy McClure

 No

 --- Seymour Skinner

Enhance or resolve the ballot by completing the voting area beside the indicated response.

More than one voting area has been completed, but a word or mark is used to indicate the correct vote.

 Yes

*not this*  No

Duplicate or enhance the ballot to correct the overvote so that the correct vote can be counted.


A word has been used to indicate the vote instead of completing the voting area.

 Yes

*I want this one*  No

Duplicate or enhance the ballot, completing the voting area for the indicated vote.

The entire response area for a contest is crossed out.

 Yes

No

Duplicate or enhance the ballot, as voter intent is not clear.

Corrections are made with liquid white-out.

 Yes

 No

Enhance or duplicate the ballot to eliminate the overvote due to the white-out.

# Ballot Counting

## NST 7 days before election

### Early scanning

---

In accordance with a security plan approved by the Secretary of State, county elections officials may begin scanning ballots into a vote tally system but are prohibited from making public the results of votes from any precinct until after 8 pm Election Day.

- ✓ ORS 254.074, 254.478, 260.705

### Preparatory test

---

- 1 Conduct preparatory test of the vote tally equipment for logic and accuracy to ensure that each ballot style correctly tallies in each precinct for each contest.
- 2 Note in the maintenance log any maintenance performed during the period that occurs after the preparatory test and before the final public certification test.
- 3 Use the current election ballots for the test deck.

- ✓ ORS 246.565(3)

### Public certification

---

- 1 Conduct a public certification test using a selection of precincts, ballot formats and electoral districts from the preparatory test.
- 2 Send notice of time and place of the test to political parties that have requested notification.  
→ One Representative of each party and each nonpartisan candidate or their designated representative is entitled to be present.

- ✓ ORS 254.235

## Immediately prior to scanning any ballots

### Repeat public certification

---

Repeat public certification test of vote tally equipment before scanning any ballots if you have not started scanning ballots seven days prior to the election.  
→ Observers may be present.

- ✓ ORS 254.485

### Counting ballots

---

- 1 Begin counting ballots.  
→ Transport ballots to the count center in a sealed container if located in a separate building.
- 2 Once ballot counting begins, tally all ballots before ending Election Day count.  
→ The Election Day count need not include:
  - ✓ Machine-rejected ballots
  - ✓ Challenged ballots
  - ✓ Write-ins
  - ✓ Ballots in provisional envelopes
  - ✓ Ballots from other counties
  - ✓ Reissued ballots
  - ✓ Replacement ballots

- ! The post 8 pm Election Day tally in any county may only be suspended with prior approval of the Secretary of State in an emergency situation.

## Ballot Counting (cont.)

### Write-in processing

---

This section describes the general procedures for processing write-in ballots. Following are examples to illustrate processing write-in votes for all counties and vote tally systems.

- 1 If it can be ascertained from the ballot for whom the vote was intended it should be counted.
  - Election boards shall disregard misspelling or abbreviations of the names of candidates if it can be ascertained from the ballot for which the vote was intended.
  - This does not allow for counting write-in names consisting of initials, as an initial can stand for any number of names. For example, Bob Smith and Robert Smith might be tallied together. R Smith should not be added into either Bob or Robert but should instead be tallied on its own.
- 2 Follow the enhancing and duplicating instructions from the previous pages, when necessary, for all write-in examples.

✓ ORS 254.500, 254.505(1)

---

### Examples

No candidate name or office written-in, but, voting area is marked and no other candidate is selected

☐ Charles Montgomery Burns

☐ Edna Krabappel

☐ Luann Van Houten

☒ \_\_\_\_\_ write-in

When the write-in line is blank, but the box is marked on the paper ballot or the voting area is marked on the optical scan ballot, the vote is counted as an undervote.

#### Paper Ballot

✓ Ignore marks and tally as an undervote.

#### Scanning Ballot

✓ Enhance, resolve or duplicate the ballot so the vote is counted as undervote.

If a full recount is conducted, any undervotes that made their way into the write-in pool can be identified and recategorized.

---

A candidate is selected and no name is written-in, but, voting area is marked.

☐ Cecil Terwilliger

☒ Selma Bouvier

☐ Kent Brockman

☒ \_\_\_\_\_ write-in

When a candidate is selected and the write-in mark is also filled in, the vote is counted for the selected candidate. It is not an overvote because no name is written-in.

#### Paper Ballot

✓ Ignore marks and tally as a vote for the selected candidate.

#### Scanning Ballot

✓ Enhance, resolve or duplicate the ballot so the vote is counted as a vote for the selected candidate.

## Ballot Counting (cont.)

### Examples

A real or fictitious name is written-in.

☐ Charles Montgomery Burns

☐ Charles Montgomery Burns

☐ Edna Krabappel

☐ Edna Krabappel

☐ Luann Van Houten

☐ Luann Van Houten

☒ Homer J. Simpson write-in

☒ Krusty the Clown write-in

When a real or fictitious name is written-in, whether or not the corresponding mark is completed, the vote is counted as a write-in. (ORS 254.145(8) states that the elector is not required to place a mark in the voting square corresponding to a name written in a blank space

If the write-in is Mickey Mouse, Thomas Cruz or John Donovan and if the county elections official validates no such active or inactive voter is registered by that name, the write-in may be abstracted as miscellaneous or as a candidate.

If the non-registered candidate receives the majority of the votes, that name may be certified to the appropriate special district indicating the status of the winning candidate. For example, ORS 255.295(2) states the district will indicate whether the candidate is qualified to hold the office.

#### Paper Ballot

- ✓ If the name of a candidate is written-in, count the vote as a write-in.

#### Scanning Ballot

- ✓ If the name of a candidate is written-in, enhance or duplicate the ballot so that the vote is counted as a write-in.

A candidate is selected and a name is written-in.

☒ Cecil Terwilliger

☒ Cecil Terwilliger

☐ Selma Bouvier

☐ Selma Bouvier

☐ Kent Brockman

☐ Kent Brockman

☒ Patty Bouvier write-in

☐ Patty Bouvier write-in

When a candidate is selected and a different name is written-in, it is counted as an overvote. The Board may make a different determination only if the voter added instructions clarifying intent.

#### Paper Ballot

- ✓ If corresponding write-in mark is not completed, count as an overvote.

#### Scanning Ballot

- ✓ If corresponding write-in mark is not completed, enhance vote so it is counted as an overvote.

## Ballot Counting (cont.)

### Examples

The write-in line contains a name that is the same as the one that is printed on the ballot for that office.

- ☒ **Barney Gumble**
- ☐ **Timothy Lovejoy**
- ☐ **Ginger Flanders**
- ☒ Barney Gumble write-in

The vote is counted as a vote for the candidate.

#### Paper Ballot

- ✓ Tally as a vote for selected candidate.

#### Scanning Ballot

- ✓ Enhance, resolve or duplicate so the vote is counted as a vote for the selected candidate printed on the ballot.

The printed candidate is selected AND the same name is written-in.

- ☒ **Barney Gumble**
- ☐ **Timothy Lovejoy**
- ☐ **Ginger Flanders**
- ☐ Barney Gumble write-in

The vote is counted as one vote for the selected candidate. It is NOT an overvote.

#### Paper Ballot

- ✓ Tally as a vote for selected candidate.

#### Scanning Ballot

- ✓ Enhance, resolve or duplicate if the voting area is completed so the vote is counted as a vote for the selected candidate.

Comments written-in, including none of the above and no candidate is selected.

- ☐ **Gil Gunderson**
- ☐ **Robert Terwilliger**
- ☐ **Moe Szyslak**
- ☐ None of the above write-in

If the comment does not include a name, the vote is not valid as cast. This vote is counted as an undervote, whether the corresponding mark is completed or not.

#### Paper Ballot

- ✓ Ignore marks and tally as an undervote.

#### Scanning Ballot

- ✓ Enhance, resolve or duplicate so vote is counted as undervote.
- or
- ✓ Allow the ballot to be counted as write-in, but tally as undervote if write-ins are tallied.

## Ballot Counting (cont.)

### Examples

When a candidate is chosen and a comment is written-in, marking or not marking the corresponding box.



Cecil Terwilliger



Cecil Terwilliger



Selma Bouvier



Selma Bouvier



Kent Brockman



Kent Brockman



I don't like any write-in



Kent is great! write-in

The vote must be reviewed by the Board to determine the voter's intent. Make adjustments necessary to count the vote as the Board determines.

#### Paper Ballot

- ✓ Ignore marks and tally as a vote for the selected candidate.

#### Scanning Ballot

- ✓ Enhance, resolve or duplicate so vote is as a vote for the selected candidate.



# Special Handling

## Special ballots

### Presidential Contest Only

---

A person who moves:

- 1 To Oregon less than 20 days before the election and is qualified to register may vote in the election for US President or US President/Vice President.
  - If the person did not vote in another state for the same office during the 6 months immediately preceding.
    - ✓ The ballot for shall be marked Presidential Only.
    - ✓ An eligible voter must appear in the office of the county elections official and complete form SEL 525.
  - 🔍 See Appendix 10, Sample Presidential Only Ballot Request Form, SEL 525.
- 2 To another state from Oregon after the 31st day before a Primary or General Election for US President/Vice President and does not qualify to vote in the state of the elector's present residence, may vote for these offices in Oregon.

❗ In each circumstance validate the qualifications of the voter prior to counting the ballot.

✓ ORS 247.410-247.435

### Provisional ballots

---

Provisional ballots are issued to voters when eligibility cannot be determined and also voters who live in another county but want to vote in your county.

#### Eligibility Cannot be Confirmed

- 1 Have the voter fill out a (provisional) registration card.
- 2 Confirm whether the voter has already voted and whether the voter meets eligibility requirements of state and/or federal law.
- 3 If the voter voted an incorrect ballot style or party ballot but the voter is eligible to vote, duplicate eligible votes onto the correct ballot.
- 4 Process the ballot in the correct precinct after the voter's eligibility is confirmed.

🔍 The county elections official may challenge any ballot pursuant to ORS 254.415.

#### When the Voter Lives in Another County

- 1 Have the voter fill out a (provisional) registration card.
- 2 Once the voter votes the ballot, send the ballot and registration card to the appropriate county. In cases where a ballot is issued and the ballot is separate from the voter registration card, note on the voter registration card that the elector was issued a provisional ballot.
- 3 If the voter voted an incorrect ballot style or party ballot but the voter is eligible to vote, duplicate eligible votes onto the correct ballot.
- 4 Process the ballot in the correct precinct after the voter's eligibility is confirmed.

✓ ORS 254.408

## Special Handling (cont.)

### Multiple ballots

#### Reissued/ supplemental ballots

More than one ballot may be issued by a county elections official without direct knowledge of the elector in the circumstances listed below. Examples include:

- Changing party status in Primary Election
- Requesting party ballot by NAV, when appropriate, in Primary Election
- Changing address, same ballot style
- Changing address, different ballot style

**!** Always flag the individual voter's file that more than one ballot was issued.

#### Error with original ballot

When there is an error with the original ballot and the county elections official reissues a ballot or issues a supplemental ballot a returned ballot should be processed and counted in the following manner:

- If only the original ballot is returned, duplicate and count the ballot only for eligible contests.
- If two ballots are returned, count the reissued ballot.
- If only the reissued ballot is returned, count the reissued ballot.
- i** The elector may only receive a new ballot reflecting an address change. Elector cannot receive a new ballot for a party change after the 21st day before the Primary Election.
- !** Include elector in 50% eligibility pool. Only applies to **March** and **September** elections.

#### Update received before registration deadline




- 1 When an update is received before 21 day party registration deadline changing the voter's political party registration information or a NAV request (if applicable) after the initial ballot labeling process is completed a reissued ballot will automatically be mailed.
- 2 A returned ballot should be processed and counted in the following manner:
  - If only one ballot is received and the ballot label matches most current information submitted by the voter, count the ballot.
  - If only one ballot is received and the ballot label does not match most current information submitted by the voter, duplicate only eligible contests reflecting most current information.
  - If two ballots are returned, process and count the ballot reflecting the information on the most current registration record or most current information submitted by the voter.
  - !** Postmark does not apply for NAVs requesting a party ballot. The request must be received no later than 5 pm on the 21st day prior to the Primary Election.

#### Voter change of address on return identification ballot envelope







- 1 When a voter updates their address after the initial ballot labeling process is complete or provides a change of address on a return identification ballot envelope the county elections official will automatically reissue and mail a ballot through the 5<sup>th</sup> day before the election.
- 2 A returned ballot should be processed and counted in the following manner:
  - Update is within the same county
    - ✓ If 1st ballot is returned, hold until after Election Day to make sure 2nd ballot is not returned.
    - ✓ If 2nd ballot is not returned, inactivate 2nd ballot in OCVR.
    - ✓ Make 1st ballot active in OCVR and count ballot as is (in accordance with NVRA).
    - ✓ If 2nd ballot is returned, count as is.
  - Update in different Oregon county (B)
    - ✓ If ballot is returned to County A, County A should hold until after Election Day to make sure 2nd ballot is not returned to County B.
    - ✓ If 2nd ballot is not returned, contact County B and have County B inactivate ballot.
    - ✓ County A re-activates 1st ballot and counts as is (in accordance with NVRA).
    - ✓ If 2nd ballot is returned to County B, count as is.

## Special Handling (cont.)

### Multiple ballots

- 3 If the address update is received after the 5<sup>th</sup> day before the election process the ballot as is and count the entire ballot.
-  Include the voter in the correct eligibility pool for March and September elections.
-  If a voter indicates a name change on the return identification ballot envelope, count the ballot. After the election move the voter to inactive and send the voter a registration card for update purposes.
-  ORS 247.563

### Replacement ballots

- 1 A replacement ballot is issued when requested by phone, in writing or in person because the original ballot was:
  - Destroyed
  - Spoiled
  - Lost
  - Not received
- 2 A replacement ballot may be mailed with a letter of explanation in the following situations:
  - A voter returns an empty return identification ballot envelope.
  - The voter is identified, but did not return the voted ballot in the return envelope.
  - The ballot is returned damaged (e.g. a postal processing machine has torn the ballot).
  - The wrong voter in the same household signed the return identification envelope.
- 3 Upon request for a replacement ballot, the county elections official must:
  - Verify the registration of the elector and ensure that the elector has not voted another ballot elector requested replacement ballot will be maintained in OCVR master list.
  - Issue the replacement ballot by mail or other means.
    -  The elections official need not mail a replacement ballot to an elector after the 5th day before the election date. However, the ballot shall be made available in the election office until 8 pm on Election Day.
- 4 The county elections official marks the envelope as a replacement ballot in one of the following ways:
  - Specially printed Replacement Ballot return envelope
    -  See Appendix 3, Sample Replacement Ballot Envelope, Specially Printed.
  - With a rubber stamp or gummed label on an existing ballot return envelope adding additional voter attestation
    -  See example in Appendix 4, Sample Replacement Ballot Envelope, Rubber Stamp.
  - Any other indication on the outside envelope, accompanied by a separate attestation form
- 5 If the voter returns two ballots, count only the first ballot received and refer the elector to the Secretary of State's office as a potential election law violation. ORS 260.715.
  -  These types of violations are criminal in nature therefore; the return identification envelope signed by the elector must be kept for 5 years. Make a copy of the return identification envelope for your records and send the original return envelope to the Secretary of State Elections Division.
  -  The elector must complete and sign a replacement ballot request form SEL 112 or sign the special printed replacement ballot return envelope before the ballot can be counted.
  -  ORS 254.470




## Special Handling (cont.)

### Signatures

#### Unsigned envelopes



---

If the ballot is returned in an unsigned envelope, the county elections official will:

- 1 Attempt to notify the voter that the ballot cannot be accepted unless the envelope is signed no later than 14 days after the election.
  - 2 Have the voter sign the return identification ballot envelope at the elections office.  
→ A signature may not be faxed or emailed except by military and overseas voters.
-  Counties should not inactivate a voter due to an unsigned return identification ballot envelope.
-  Unsigned ballots are handled as a special challenged ballot and are kept confidential until the 8th day after the election.
-  ORS 253.510, 253.690, 254.431

#### Two signatures on one return identification ballot envelope

---

- 1 If more than one ballot is returned and both voters from the same household signed the return envelope verify that the signatures match the voters' registration records and count both ballots.  
→ Place the other voters label on the return identification envelope. Refer to county elections official for further review.
  - 2 If signatures do not match the voters' registration records follow signature no match process below.  
→ Signatures must be resolved no later than 14 days after the election if not resolved reject both ballots.
-  If two ballots are enclosed in one return identification ballot envelope but only one signature, both ballots are rejected.
-  A replacement ballot cannot be issued because the voter has already cast a ballot.





#### Signatures that do not match the registration record

---

- 1 An experienced deputized elections staff member must review all initially rejected signatures using the following criteria:
  - Capital letters match
  - Letters tail off alike
  - Letter spacing is the same
  - Space between signature and the line is the same
  - Beginning and ending of signature
- 2 If the signature does not match the voter registration record:
  - Send a challenge notice and a registration card to the voter indicating that the signature does not match. The challenge must be resolved no later than the 14th day after the election.
  - If no response, place the voter into an inactive status after the 14th day after the election.
  - Resolution requires voter providing sufficient proof in-person (or by mail with an updated registration card) reflecting the voter's signature.

## Special Handling (cont.)

### Signatures

- 3 If the voter returns the registration card or provides sufficient evidence that the voter signed the return identification ballot envelope, count the ballot.
  - 4 If the signatures on the return identification ballot envelope and the new registration record still do not match, do not count the ballot. The ballot is placed with the unaccepted ballots.
  - 5 If the signature does not match the voter registration record and it appears another individual not from the same household has signed a different name on the ballot:
    - Unaccept the ballot.
    - Contact the voter as soon as possible to determine the appropriate resolution. Resolution will not be possible after 8 pm on Election Day.
  - 6 If the signature does not match the voter registration record and it appears that someone else within the same household may have signed the wrong return identification envelope:
    - Contact the voter who did not have the opportunity to vote and ask if they would like to be sent a replacement. Ballot must be received by 8 pm on Election Day.
    - Place the correct voter's information on the envelope. Do not cover up the original label. Verify the voter's signature and if it matches count the ballot in full.
    - Consider household exception on all other ballots in the household.
    - If there is not enough time to issue a replacement ballot count the ballot that was returned, giving voting credit to the person who signed.
      -  If this is a Primary Election and the voters within the same household are of different party affiliations and only one ballot was received process to ensure that the ballot enclosed is the ballot that the voter is eligible to vote. If it is not the correct ballot only count the contest that the voter is eligible to vote on.
  - 7 After election, once all ballots are collected:
    - Remove activity from label that was actually received as person did not vote.
      -  Only ballots from the same household (same residential address) can be considered, crossed signatures from different households cannot be considered.
    - All ballots must be received by 8 pm on Election Day.
    - If all ballots are turned in no later than 8 pm, and the signatures match the voters' registration records count all ballots.
  - 8 After the challenge period is over, the elections official may send a second letter to the elector indicating:
    - Ballot was unaccepted.
    - New registration with signature is requested advising the voter that their registration has been moved to inactive status.
  - 9 If the signature does not match the voter registration record and/or it appears that another individual has signed a different name on the return identification ballot envelope and you are unable to resolve the situation, refer to the Secretary of State's office as a potential election law violation.
-  See Appendix 8, Sample Signature Verification Problems.
-  ORS 246.046, 254.426, 254.470(6), 260.715


## Special Handling (cont.)

### Returned mail

#### Sort undeliverables

---

- 1 Sort undeliverables for postal errors, office errors and various unique ballots (i.e. returned to us in our own envelopes) and remail corrected ballots.
- 2 Sort the ballots for processing:
  - Deceased
  - Temporarily away
  - New addresses in county
  - New addresses out of county/state
  - Change of mailing address
  - Moved left no address (MLNA), unable to forward, etc.
- 3 Processing is not required until after the election, but if a county should decide to process during the election, registration is kept up to date and helps resolve data entry and handling errors while there is still time to get a ballot to a qualified voter.
- 4 In a 50% turnout election, process undeliverables in a manner to preserve eligibility determination.

 See Appendix 15, Undeliverable Ballot Matrix.


### Envelopes


#### Return identification ballot envelopes from previous elections

---

If the voter returns a return identification ballot envelope during a scheduled election cycle for a previous election date:

- Do not open the envelope
- Place the return identification envelope with the rejected ballots

 Notification is not required since it is past the 14 days after the date of the previous election.

 ORS 254.470(7), (9)

### Voter update

#### Voter name change on return identification ballot envelope

---


- If a voter indicates a name change on the return identification ballot envelope, count the ballot.
- After the election move the voter to inactive and send the voter a registration card for update purposes.

## Special Handling (cont.)


### Eligibility

#### Process challenged ballots

---

- 1 Challenged ballots are those that are flagged:
    - Because the county elections official questions whether the voter's eligibility has changed since last registering to vote
    - or
    - Because a voter challenges another voter's eligibility to vote
  - 2 Challenges must be:
    - filed in the elections office
    - filed on the appropriate form SEL 535
  - 3 Challenge forms should be attached to the appropriate ballot envelope.
    - Research for eligibility of the voter as soon as practicable but no later than 14 calendar days after the date of the election.
-  A voter's ballot may be challenged at any time before the ballot is removed from its return envelope for processing. Ballots containing no signature or signatures that do not match become public record on the 8<sup>th</sup> day after the election.


The county elections official completes the following steps in processing challenged ballots:

- 1 Flag the challenged voter's ballot until the challenge is resolved.
- 2 If a ballot is challenged under ORS 253.700 or 254.415 send the voter a challenge letter requesting information needed in order to determine eligibility.
- 3 Inform the voter that the ballot will not be counted unless the voter can demonstrate their eligibility no later than the 14th calendar day after the date of the election. Based on the results of the inquiry:
- 4 As soon as practicable, but no later than the 14th calendar day after the date of the election, determine whether the challenged ballot should be counted or if the voter has not resolved the challenge place the voter into an inactive status.
- 5 Tally only the contests for which the voter is qualified to vote for party affiliation changes only in the Primary Election.
- 6 If a challenged ballot is to be counted, the county elections official ensures that the challenge number is written on the ballot and is kept confidential. The ballot must include the challenge number so the ballot may be identified in any future contest of election.
  -  This does not apply to signatures that do not match the voter registration record or ballots return identification envelopes with no signature provided under ORS 254.431.

 See Appendix 5, Vote by Mail Challenge Form, SEL 535.

# Certification

## NLT 3 business days after election      **Forward any remaining return ballot envelopes belonging to other Oregon counties**

-  See Transfer return ballot envelopes belonging to other Oregon counties on page 27.

## NLT 14 days after election      **Resolve outstanding ballot issues**

- 1 Resolve all challenged ballots.  
→ Process eligible challenged ballots.


## Before certification      2 Resolve all provisional ballots. → Process eligible provisional ballots.

## Upon completion of ballot count and before certification      **Reconcile ballots**

- 1 Compare the number of ballots processed to the return identification ballot envelope counts or computer voter history log for the precinct.
- 2 If the counts do not match, the county elections official reconciles the totals to resolve the discrepancies prior to certifying the election results.
- 3 Once ballots have been reconciled prepare abstracts to be delivered.

## After ballots are counted and reconciled but before certification or vote tally system is shut down      **Repeat public certification test of vote tally equipment**

- 1 Use the same selection of precincts, ballot formats and electoral districts as was performed at the Election Day public certification test. ORS 254.525
- 2 Observers may be present. ORS 254.482
- 3 Remember to distinguish in tally system maintenance log all maintenance performed after the preparatory test and before the final certification test.
- 4 Log everything.
- 5 Certify the results of the test.


-  ORS 254.482, 254.525

## NLT 20 days after election      **File abstract of votes**

File abstract of votes with the appropriate elections officials.

## NLT 30 days after March and September elections      **Determine voter turnout**

Determine voter turnout and issue certification of voter participation for ad valorem property tax measures requiring 50% turnout to be adopted.

-  OAR 165-007-0130



## Certification (cont.)

**NLT 30 days  
after each  
election**

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### **Precinct level results and Ballot Count Report**

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Electronically transmit to the Secretary of State:

- Results for each contest by precinct
- Ballot Count Report

✓ ORS 254.545(7)

**NLT 45 days  
after election**

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### **Post election notices of rejected ballot.**

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- 1 Notify the voter of the reason why the voter's ballot was not counted if the ballot was received by the 14th day after the election. The notice shall include:
  - Reason the ballot was rejected
  - Steps the voter can take to ensure that ballots in future elections will be counted
- 2 Send a notice to:
  - Any voter who has not previously been notified that the voter's ballot was not counted because the voter did not sign the return identification ballot envelope.
  - A voter whose ballot was postmarked through Election Day and the ballot was received too late to be counted if the ballot was received within 14 days after the election.

🔍 See Appendix 9, Sample Notice of Rejected Ballot.

# Ballot Storage

## After election

### Seal and store ballots

---

- 1 Seal and store all ballots, including ballots received too late, provisional and challenged ballots.
- 2 Review Archive Retention Rules.
- 3 Store undeliverables and secrecy envelopes for 60 days after the last date to contest the election.
- 4 Store all other records of the election (working papers, all return identification ballot envelopes, except those unaccepted, and master list of voters) for 2 years.
- 5 Consider storing ballots by precinct for recount purposes.
- 6 Store ballots in secure sealed containers:
  - Ballots (voted, counted).
  - Defective ballots (originals of duplicated ballots).
  - Rejected ballot envelopes (passed signature verification but not counted for some other reason).
  - Unaccepted ballot envelopes (did not get past signature verification step) challenged ballot forms (must remain confidential).

✓ OAR 166-150-0035

## Glossary

<b>Ballot Cast</b>	A ballot that has been deposited into an official dropsite, the USPS mail or submitted to the county elections office.
<b>Challenged Ballot</b>	Ballot that is held for further research because there is a question as to the voter's eligibility (such as questions regarding address) or because the signatures on the return identification ballot envelope and the registration card do not match.
<b>County Elections Official</b>	The county clerk or the county official in charge of elections.
<b>Defective Ballot</b>	Ballots that cannot be accurately tallied by the counting equipment unless enhanced or duplicated. These are found by the inspection boards or are identified by the ballot counting equipment.
<b>Duplicate Ballot</b>	A blank ballot onto which original votes are copied exactly for purposes of counting. A duplicate ballot is created when the original ballot is damaged, is not machine-readable or cannot be enhanced.
<b>Duplication Board</b>	Persons performing the task of duplicating ballots.
<b>Effective Registration Date</b>	The date the voter registration record was received by a county elections official, the Secretary of State, the Department of Transportation or any designated voter registration agency as described in ORS 247.208; the date it was received from the United States Postal Service; the date it was postmarked by the United States Postal Service, if applicable, or; the date information is entered into OCVR by the county elections official from updated information received from a change of address service endorsed by the United States Postal Service.
<b>Enhance</b>	The process of modifying an original ballot in order to make it machine-readable, the process includes darkening a vote area so the counting/scanning equipment can see the vote or enhancing a vote area so the counting equipment will not read an extraneous mark or an erasure as a vote. The alterations must be made so that the original ballot can be seen in the event of a contest of election.
<b>HAVA ID Ballot</b>	A ballot issued to a registrant new to Oregon who failed to provide the Department of Motor Vehicle or Social Security identification number required by the Help America Vote Act of 2002 and would not be qualified to vote on federal offices until those requirements are met.
<b>HAVA ID</b>	Oregon driver license, social security number or valid photo identification, a paycheck stub, a utility bill, a bank statement, a government document showing name and current address, proof of eligibility under the Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA) or the Voting Accessibility for the Elderly and Handicapped Act (VAEH)
<b>Inspection Board</b>	Persons who perform the task of inspecting ballots after the ballots are removed from the secrecy envelopes and before the ballots are counted.
<b>Issue Date for VNC</b>	The date entered into the system to print (now or later) the VNC, or the date a modification was made to the voter record that automatically caused a VNC to be sent. This is the date that shows on the VNC. The original date of registration does not appear on VNC.

## Glossary (cont.)

<b>Machine-Rejected Ballot</b>	Defective ballot that is not machine-readable, including a ripped or torn ballot, a ballot voted with an instrument that cannot be read by the machine or a ballot with extraneous marks within the read head path.
<b>Master List</b>	The names of all voters to who ballots were mailed. The list can be an electronic file from OCVR or hard copy.
<b>Military/Overseas Elector</b>	As defined in ORS 253.510 and 253.530, a resident of this state absent from the place of residence and serving in or discharged 30 days or less from the United States Armed Forces or United States Merchant Marine; temporarily living outside the territorial limits of the United States and the District of Columbia the spouse or dependent of a long term absent elector.
<b>MOVE</b>	Military and Overseas Voter Empowerment Act provides greater protections for service members, their families and other overseas citizens. It requires states to transmit absentee ballots to UOCAVA voters no later than 45 days before a federal election.
<b>Non-Affiliated Voter (NAV)</b>	An elector who has chosen not to be a member of any political party as indicated on the voter registration card.
<b>Opening Board</b>	Persons performing the task of removing ballots from the return identification and secrecy envelopes.
<b>Observer</b>	An individual(s) who has obtained prior approval from the county elections official in representing a candidate, measure, PAC, special interest group or Political Party or a member of the general public for the purpose of observing the election processes. These individuals are only to observe and may not at any time interfere or interact with elections staff while they are performing their duties and must direct any questions only to a designated supervisory staff person.
<b>Original Registration Date</b>	First date a voter registers in the state. This date is not modified after entry unless a clerical error is made at the time of entry.
<b>Provisional Ballot</b>	A ballot that is issued when the eligibility of the voter has not yet been determined or when the county elections official issues a ballot to a voter who resides in another Oregon county.
<b>Reissued Ballot</b>	A ballot that is issued to a voter by the county elections official to correct an error in the printing or issuing of an original ballot or to a voter who has updated their registration.
<b>Rejected Ballot</b>	Ballots that have passed signature verification but which cannot be counted because of other problems.
<b>Replacement Ballot</b>	A ballot that is issued upon request from a voter when the original ballot has been destroyed, spoiled, lost or not received by the voter.
<b>Return Identification Ballot Envelope</b>	The envelope issued by the county elections official for a particular election and used by the voter to return a voted ballot. Envelope displays voter's name, address, precinct, ballot type and other pertinent information and provides a place for voter to sign under oath.

## Glossary (cont.)

<b>Spoiled Ballot</b>	A ballot that cannot be counted because it is ruined in some way by the voter. The county elections official can issue a replacement ballot for a spoiled ballot but replacement ballots must be voted and returned prior to 8 pm on Election Day.
<b>Supplemental Ballot</b>	An additional ballot that is issued to voters due to a correction in or an addition to the original ballot sent for that election.
<b>Transaction Date</b>	The date a modification of any kind is made to a voter record in the voter registration module (other than a merge).
<b>Unaccepted Ballot</b>	Ballots that are not processed beyond the step of signature verification. Includes envelopes with no signature, signature does not match, ballots not returned in return identification ballot envelope. Ballot does not arrive before 8 pm on Election Day.
<b>UOCAVA</b>	Enacted in 1986, the Uniformed and Overseas Citizens Absentee Voting Act protects the rights of service members to vote in federal elections regardless of where they are stationed. UOCAVA was expanded in 2009, when Congress passed the Military and Overseas Voter Empowerment Act.
<b>Voided Ballot</b>	Removing the activity of receiving a cast ballot within OCVR. In select cases a ballot that has been received by the county elections official should be considered void. In these cases, the original ballot should return to the sent status in OCVR.
<b>Voter Notification Card (VNC)</b>	A notice mailed to a new registrant or a voter who has updated their registration. ORS 247.181
<b>Voter Confirmation Card (VCC)</b>	A forwardable notice mailed to the elector whose registration appears to be invalid and whose registration may need to be updated. ORS 247.563

## Acronyms

<b>BT</b>	Ballot type
<b>CASS</b>	Certified Address Street Service
<b>DMV-COA</b>	Department of Motor Vehicles-Change of Address
<b>FPCA</b>	Federal Postcard Application
<b>FVAP</b>	Federal Voting Assistance Program
<b>GPC</b>	General Postal Card
<b>HAVA</b>	Help America Vote Act
<b>IMB</b>	Intelligent Mail Barcode
<b>LPB</b>	Large Print Ballot
<b>L&amp;A</b>	Logic and Accuracy Test
<b>MLNA</b>	Moved Left No Address
<b>MOVE</b>	Military and Overseas Voter Empowerment Act
<b>NAV</b>	Non-Affiliated Voter
<b>NCOA</b>	National Change of Address
<b>NLT</b>	Not Later Than
<b>NST</b>	Not Sooner Than
<b>NVF</b>	Number to Vote For
<b>NVRA</b>	National Voter Registration Act
<b>OAR</b>	Oregon Administrative Rule
<b>OCR</b>	Optical Character Recognition
<b>OCVR</b>	Oregon Central Voter Registration System
<b>ORS</b>	Oregon Revised Statute
<b>PCT</b>	Precinct
<b>SOS</b>	Secretary of State
<b>SFTP</b>	Secure File Transfer Protocol

## Acronyms (cont.)

<b>UOCAVA</b>	Uniformed and Overseas Citizens Absentee Voting Act of 1986
<b>USPS</b>	United States Postal Service
<b>UPS</b>	United Parcel Service
<b>VBM</b>	Vote by Mail
<b>VCC</b>	Voter Confirmation Card
<b>VNC</b>	Voter Notification Card
<b>VP</b>	Voters' Pamphlet
<b>VRC</b>	Voter Registration Card

## Sample Election Observer Rules

**Office of Any County Clerk**  
Elections Division

# Election Observer Rules

## Check in Procedures

- 1 All observers must report and sign-in daily at front counter.
- 2 An Official Observer badge will be issued and must be worn at all times.
- 3 All observers must be escorted by designated election staff to and from designated observer stations.
- 4 When leaving for the day, return the badge to the front counter.

## General Rules

I, the undersigned, having been appointed as an observer of the (insert election date) process, agree to comply with the following rules:

- 1 Observers will conduct themselves in a professional manner.
- 2 Observers will remain silent and not interfere with the activities of Election workers.
- 3 Observers will address all questions to a designated supervisory staff member and comply with their directions.
- 4 Observers will wear the Official Observer badge at all times while in the ballot processing area.
- 5 Observers may not handle any ballots or election materials.
- 6 Observers must keep confidential and not divulge to anyone election results until after 8 pm on Election Day.



**Violation of these rules may result in removal from the premises and may result in criminal and/or civil penalties as provided for in ORS 260.993 and ORS 260.995.**

[illegible]



# Sample Oregon County Ballot Security Plan

*This sample security plan is intended to provide guidance to counties – it is not a statement of minimum or maximum requirements.*

## Oregon County Ballot Security Plan (as of latest revision date)

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### I Introduction

A security plan must be submitted to the Secretary of State, Elections Division, not later than the 31st of January of each year. Any revisions to the plan must be submitted not later than one business day after the revision is made. The security plan and all supporting documentation are confidential and not subject to public disclosure.

All ballots must be carefully secured from their inception in the county's computers, through printing, insertion, to the electors and final storage. This secure process must be followed through ballot reception, verification, inspection and counting. The County Elections Official must include accountability procedures for ballots during the election process. During each phase of the process the County Elections Official must maintain an audit trail for all ballots, whether voted or unused.

Copies of all security agreements with outside vendors must be submitted to the Secretary of State as part of the overall security plan.

This sample plan provides for security at the various stages of the election process in Oregon County. This sample plan provides a basis for an actual overall county security plan and is intended to be customized to fit each elections jurisdiction's needs.

---

### II Ballot Security at the Printers

The following security procedures are to be implemented to safeguard the ballots during the printing and binding process:

- Ballots should be accessible only to authorized personnel while being printed.
- All ballots will be typeset using computers that do not allow access by unauthorized users, either on the printer's premises or from the outside. Backup documentation, printed ballots, and depending on the county tally system— any negatives, printing plates and metal plates, must be kept secure.
- Include accountability methods for:
  - ✓ Negatives
  - ✓ Printing plates and ballots
  - ✓ Audit trail of ballots

---

### III Ballot Storage Security

All ballots, voted or unused, must be locked in a secure room and accessible to authorized personnel only. Provide the number and location of all video surveillance cameras within the elections office.

---

### IV Ballot Security During Insertion

- The secure room must be locked when authorized personnel are not present.
- Ballots must be stored in sealed boxes or a secure room until the insertion begins.
- Security Agreement with Vendor:
  - ✓ provide personnel assuring security on site
  - ✓ an Oregon County Elections staff worker shall verify receipt of ballots upon delivery from the printer, first verifying the count of ballots received by style and number ordered

---

**V Ballot Security During Transport**

- During transfer from printing vendor, ballots must remain in boxes that are sealed. If applicable, upon arrival to insertion vendor, vendor verifies receiving ballots to be inserted.
- After insertion of ballots, ballots are again stored. These are locked in a secure room until mailing.
- For counties using a vendor for inserting ballots, ballots are picked up from insertion vendor site by the county or by Postal Service. At that time, the Post Office takes custody of the ballots.
- Unused ballots from insertion site are brought back to the County Elections Office by authorized personnel.
- Between Post Office and/or Vendor Presort and Elections (for ballots mailed from Elections Division), ensure that all ballot envelopes are sealed or that authorized personnel accompany the ballots to the Post Office or Vendor Presort.
- For counties using separate locations for ballot verification and ballot processing, ensure all ballot envelopes are sealed and that authorized personnel accompany the ballots between buildings.
- Between Dropsite and Elections:
  - ✓ Authorized personnel shall package all voted ballots received in transport carrier boxes provided by the county election office. The boxes shall be securely sealed with seals provided by county elections.
  - ✓ Transport between sites shall be provided by two authorized personnel, enforcement or deputized personnel. Transporters shall not stop, park or leave the ballots unguarded while en route to processing, in order to maintain security. If using two elections staff, it is recommended they be of different political parties.

---

**VI Ballot Security at Dropsites**

- Secure ballot boxes shall be within sight of an authorized person throughout the hours that the site is open to the public or secured in such a manner as to prevent tampering (e.g. mailbox type installed drop slots that are permanent.). The box shall be removed from public view at end of each site workday, and locked at a secure location assuring the security of the ballots.
- When the box is full or at specified times during the election time frame, the ballots that have been turned in shall be removed from the secure ballot box, placed in a secure transport carrier box and forwarded to the county elections office via two authorized personnel or by law enforcement or deputized personnel. The authorized personnel shall have written authorization signed by the election official and show it to the Dropsite personnel for verification prior to turning over the ballots.
- Each site shall have a joint security agreement signed by the Drop Site Manager and the Election Official.
- Dropsite Security forms must be completed and filed with the Secretary of State.

---

**VII Security of Voted Ballots Awaiting Verification**

- Voted ballots are retrieved from the Post Office on a daily basis or as often as required. Ballots are also removed from official ballot reception boxes as necessary. All problems, such as the ballots with no signatures, are separated and investigated at this time.
- While ballots are being processed, access to this space shall be limited to authorized personnel only.
- ⑨ See Appendix 1, Observers Rules, of Vote by Mail Manual.

---

**VIII Security of Voted Ballots Verified and Awaiting Inspection**

- After signature verification, the acceptable voted ballots shall be sorted by precinct (if required by vote tally system), counted and kept in a secured manner and location. All ballots other than accepted voted ballots should be stored in a secure area.

---

**IX Security of Voted Ballots Opened and Inspected**

- Ballots that have been inspected and are awaiting vote tally are kept in sight of authorized personnel and/or law enforcement or deputized personnel at all times. If ballots cannot be counted by the end of the day, county election officials shall secure ballots until the tally of ballots begins.

---

**X Ballot Tally System**

- A county security plan must contain information specific to the county ballot tally system to ensure computer access security. Only authorized personnel may access the system.
- The plan must also contain provisions for the security of offsite storage for systems backup.
- The plan must address security of system during 7 day scanning period.

---

**XI Post Election Security**

- Seal and store all ballots, including ballots received too late, provisional ballots and challenge ballots in a secure facility accessible only to authorized personnel.

---

**XII Other Security Considerations**

- Security associated with media relations groups.
- Security at times when ballots are being processed, such as during verification or during processing access to spaces where ballots are being handled shall be limited to authorized personnel.
- Security associated with elections observers:
  - ✓ Observers will be limited depending on amount of space.
  - ✓ Interested observers must sign and comply with the Election Observer Rules.

---

**XIII Emergency Circumstances**

- Include in a county security plan any plans to handle ballot processing and security of such, in the event of various emergency circumstances.

---

**XIV Prevention of early release of scanned ballot results**

- A county security plan must address prevention of a premature release of vote tally information.

## Appendix 3

# Sample Replacement Ballot Return Envelope

Specially Printed

Front of sample envelope *not to scale*

<div data-bbox="194 462 636 625"><hr/><hr/><hr/><hr/></div> <div data-bbox="180 644 451 722"><b>Replacement Ballot Return Envelope</b></div> <div data-bbox="180 833 472 865"><i>replacement ballot enclosed</i></div>	<div data-bbox="727 541 971 638"></div> <div data-bbox="755 644 993 732"><b>County Elections Office</b> Address City State Zip</div>	<div data-bbox="1367 466 1455 548"></div>
--	--	---

Back of sample envelope *not to scale*

Replacement Ballot Return Envelope	
<div data-bbox="233 1434 760 1640"> 316092598 5373 056 05-21-13  314159 *****AUTO**5-DIGIT 97310 NEDWARD FLANDERS 738 EVERGREEN TER SPRINGFIELD OR 97477-0808</div>	<div data-bbox="823 1388 1027 1415"><b>Voter's Statement</b></div> <div data-bbox="823 1415 1006 1440"><i>By signing, I certify that:</i></div> <div data-bbox="797 1436 1320 1530"><ul style="list-style-type: none"><li>→ I am the person to whom this ballot was issued.</li><li>→ I am legally qualified to vote in the county that issued this ballot.</li><li>→ This is the only ballot I have voted this election</li><li>→ I still live at the address where I am registered to vote.</li></ul></div> <div data-bbox="823 1533 1159 1562"><b>Replacement Ballot Statement</b></div> <div data-bbox="823 1560 1364 1608"><i>By signing this envelope, I certify that I have requested this replacement ballot.</i></div> <div data-bbox="829 1694 958 1719"><hr/><i>voter's signature</i></div>

# Sample Replacement Ballot Return Envelope

Rubber Stamp

Front of sample envelope *not to scale*

<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <p><b>Ballot Return Envelope</b></p> <p><i>ballot enclosed</i></p>	<p><b>REPLACEMENT BALLOT</b></p> <div></div> <p><b>County Elections Office</b> Address City State Zip</p>	<div></div>
--	---	-------------

Back of sample envelope *not to scale*

<b>REPLACEMENT BALLOT</b>	
<div></div> <p>316092598 5373 056 05-21-13 314159 *****AUTO**5-DIGIT 97310 HOMER J SIMPSON 742 EVERGREEN TER SPRINGFIELD OR 97477-0818</p>	<p><b>Voter's Statement</b> By signing, I certify that:</p> <ul style="list-style-type: none"><li>→ I am the person to whom this ballot was issued.</li><li>→ I am legally qualified to vote in the county that issued this ballot.</li><li>→ This is the only ballot I have voted this election</li><li>→ I still live at the address where I am registered to vote.</li></ul> <p><b>Replacement Ballot Statement</b> By signing this envelope, I certify that I have requested this replacement ballot.</p> <p>_____ voter's signature</p>

# Sample Vote by Mail Challenge Form

## Vote by Mail Challenge Form

**SEL 535**rev 02/14  
ORS 254.415

An elections official or elector challenging the ballot of a person they know or suspect not to be qualified as an elector must affirm a statement of facts upon which the challenge is based. A person's ballot may not be challenged once it is removed from its return envelope for processing.

This filing is made by: ☐ Election Official ☐ Elector


**Challenge Information****Precinct Number****Challenge Number****Challenger****Name****Contact Phone****Address****Person Being Challenged****Name****Statement of Facts** The person named above is challenged as a qualified voter for the following reason(s):**Oath of Challenger****Signature****County Elections Official** Subscribed and affirmed before me on this day by the challenger named above:**Date****Signature**

## Appendix 6



# Sample Return Envelope

Provisional Ballot

Front of sample envelope *not to scale*

<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div><b>Provisional Ballot Return Envelope</b></div> <div><i>provisional ballot enclosed</i></div>	<div></div> <div><b>County Elections Office</b> Address City State Zip</div> <div></div>
--	---

Back of sample envelope *not to scale*

<b>Provisional Ballot Return Envelope</b>	
<div> 316092598 5373 056 05-21-13  314159 *****AUTO**5-DIGIT 97310 MARGARET SIMPSON 747 EVERGREEN TER SPRINGFIELD OR 97477-0818</div>	<div><b>Voter's Statement</b> By signing, I certify that: → I am the person to whom this ballot was issued. → I am legally qualified to vote in the county that issued this ballot. → This is the only ballot I have voted this election → I still live at the address where I am registered to vote.</div> <div><hr/>voter's signature</div>

## Appendix 7

## Sample Dropsite Security Plan Form

Springfield County, Oregon

Date of Election

## Official Sites for ballot Deposit Security Plan (Dropsites)

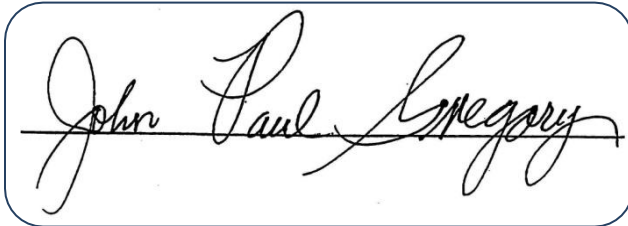
Date and hours	Transport security and frequency of collection	Security <i>Include whether box is supervised and/or permanently mounted</i>	Other security measures <i>daily supervision of box, security cameras, etc</i>
<b>Cypress Creek Recorder's Office</b>			
10/20–11/6 business hours; 11/7 until 8 pm	Mondays, Fridays and Election day in the morning, afternoon and during 8 pm sweep	Padlock on ballot box; box is locked in a secure room in city hall at night by city staff.	Drop box in lobby of the recorder's office in sight of city staff.
<b>Ogdenville Recorder's Office</b>			
10/20–11/6 business hours; 11/7 until 8 pm	Mondays, Fridays and Election day in the morning, afternoon and during 8 pm sweep	Padlock on ballot box; box is locked in a secure room in city hall at night by city staff.	Drop box in lobby of the recorder's office in sight of city staff.
<b>Capital City Recorder's Office</b>			
10/20–11/6 business hours; 11/7 until 8 pm	Mondays, Fridays and Election day in the morning, afternoon and during 8 pm sweep	Padlock on ballot box; box is locked in a secure room in city hall at night by city staff.	Drop box in lobby of the recorder's office in sight of city staff.
<b>Springfield Recorder's Office</b>			
10/20–11/6 business hours; 11/7 until 8 pm	Mondays, Fridays and Election day in the morning, afternoon and during 8 pm sweep	Padlock on ballot box; box is locked in a secure room in city hall at night by city staff.	Drop box in lobby of the recorder's office in sight of city staff. Drop box monitored at night by a surveillance camera.
<b>Haverbrook Aquatic District Office</b>			
10/20–11/6 business hours; 11/7 until 8 pm	Mondays, Fridays and Election day in the morning, afternoon and during 8 pm sweep	Padlock on ballot box; box is locked in a secure room in city hall at night by city staff.	Extra long hours, open on weekends
<b>Springfield County Clerk's Office in lobby of Courthouse</b>			
10/20–11/6 business hours; 11/7 until 8 pm	Daily	Locked box during day; box locked in secure room in clerk's office at night	Drop box unattended at courthouse lobby, courthouse doors staffed by sheriff's deputies at metal detecting machine.
<b>Drive Through Drop Box in Parking Lot of Brockway Hardware</b>			
10/20–11/6 24-hour access; 11/7 until 8 pm	Daily	Locked and anchored to the ground.	Ballots may be deposited without leaving the car.
<b>Drive Through Drop Box in East Parking Lot of Courthouse</b>			
10/20–11/6 24-hour access; 11/7 until 8 pm	Daily	Locked and anchored to the ground.	Ballots may be deposited without leaving the car.
<b>County Elections Official</b>			
Signature		Date	



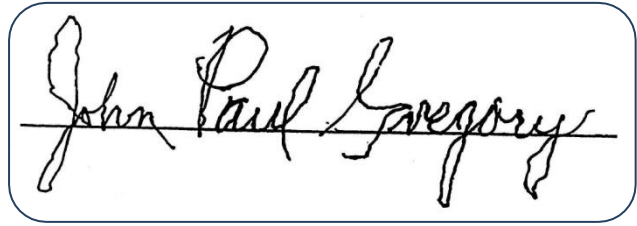
## Sample Signature Verification Problems

---

Signature change has taken place because of age or other factors. If the change is too great recommend that the voter re-register.

A cursive signature of "John Paul Gregory" written on a horizontal line. The letters are fluid and connected, with a large 'J' and 'G'.

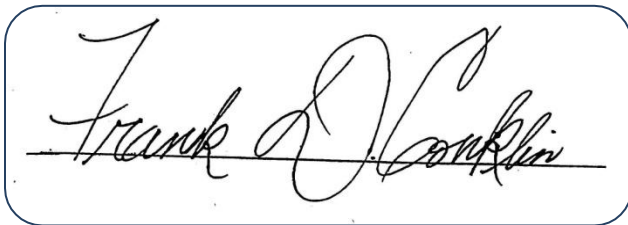
Signature 1

A cursive signature of "John Paul Gregory" written on a horizontal line. The letters are more rigid and less fluid than Signature 1, with some sharp angles and less connection between letters.

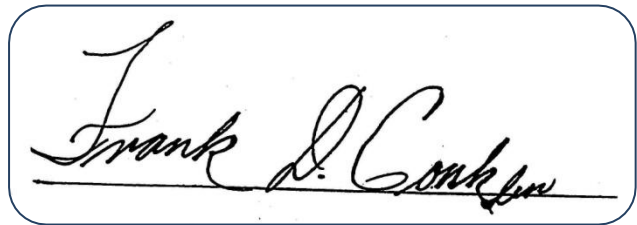
Signature 2

---

Signature 2 should be challenged as a possible forgery. Check the registrations of other registered voters in the household with signature 2.

A cursive signature of "Frank D. Conklin" written on a horizontal line. The letters are fluid and connected, with a large 'F' and 'C'.

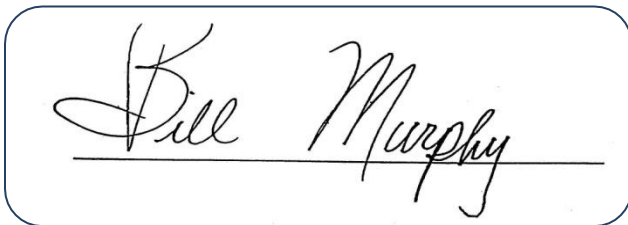
Signature 1

A cursive signature of "Frank D. Conklin" written on a horizontal line. The letters are more rigid and less fluid than Signature 1, with some sharp angles and less connection between letters.

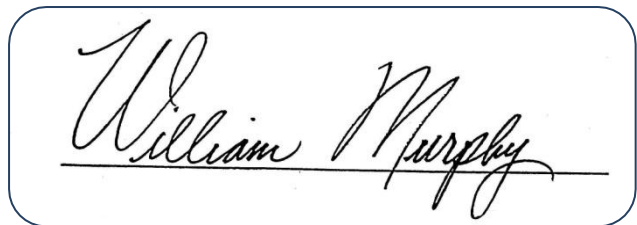
Signature 2

---

The signatures show differences, but the differences could be attributed to when the signature was made and the age of the writer at the time. Recommend that the subject re-register.

A cursive signature of "Bill Murphy" written on a horizontal line. The letters are fluid and connected, with a large 'B' and 'M'.

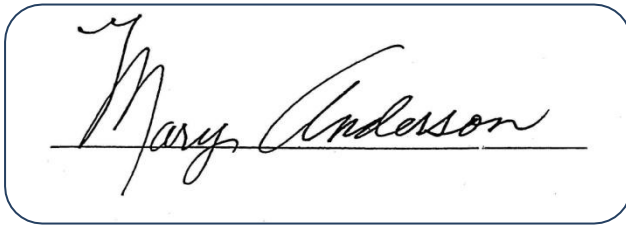
Signature 1

A cursive signature of "William Murphy" written on a horizontal line. The letters are more rigid and less fluid than Signature 1, with some sharp angles and less connection between letters.

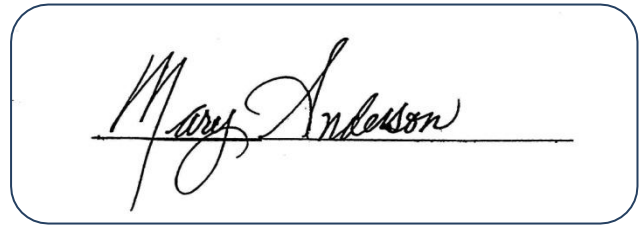
Signature 2

---

Signature 1 displays different capital letters and pre-strokes of lower case letters than signature 2. Take into account the time factor (e.g. signature 1 was written in 1967 and signature 2 was written in 1984).

A cursive signature of "Mary Anderson" written in a fluid, connected style. The capital "M" has a large loop, and the "A" is also cursive and connected to the "n" in "Anderson".

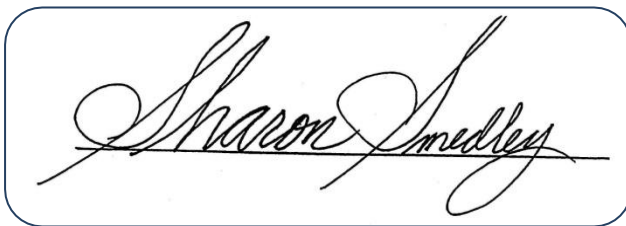
Signature 1

A cursive signature of "Mary Anderson" written in a more formal, upright style. The capital "M" is more compact, and the "A" is also cursive but appears slightly different from the one in Signature 1.

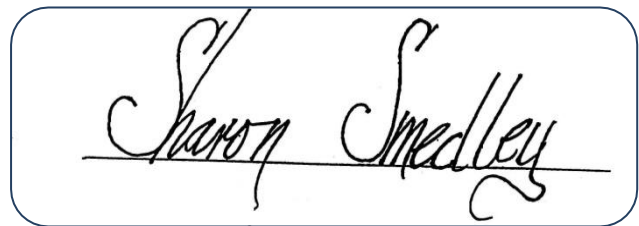
Signature 2

---

Signature 2 shows a great difference and change from signature 1. Registered subject might have been influenced by calligraphy, etc. or other subject is responsible. Recommend that the subject re-register.

A cursive signature of "Sharon Smalley" written in a fluid, connected style. The capital "S" has a large loop, and the "S" in "Smalley" is also cursive and connected to the "m".

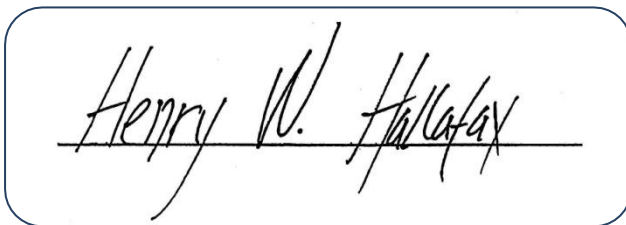
Signature 1

A cursive signature of "Sharon Smalley" written in a more formal, upright style. The capital "S" is more compact, and the "S" in "Smalley" is also cursive but appears slightly different from the one in Signature 1.

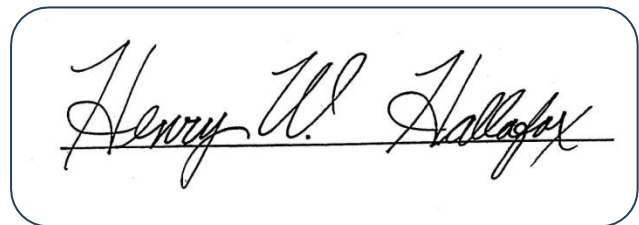
Signature 2

---

Signatures cannot be compared. Signature 1 is printed and signature 2 is handwritten. Recommend that the subject re-register and use the signature that he wants recognized as his official voting signature.

A printed signature of "Henry W. Halifax" in a serif font. The letters are clear and distinct, with a horizontal line underneath.

Signature 1

A handwritten signature of "Henry W. Halifax" in a cursive style. The letters are fluid and connected, with a horizontal line underneath.

Signature 2

## Sample Notice of Rejected Ballot

**Office of Any County Clerk**  
Elections Division

### Notice of Rejected Ballot

---

Dear Elector,

I regret to inform you that your ballot for this past election was not counted. We are providing you this notice so next election you can correctly vote your ballot and your ballot will be counted.

Your ballot was not counted for one of the following reasons:

- You did not sign your return identification ballot envelope and did not respond to our attempt, if any was possible, to contact you
- or
- Your ballot was received after 8 pm on Election Day and the postmark indicated you mailed your ballot too late. Please note if you are not sure you have enough time to mail your ballot we recommend you use an official drop site box to assure your ballot will be delivered in time.

Sincerely,

County Elections Official

# Sample Presidential Only Ballot Request Form

## Presidential Only Ballot Request Form

**SEL 525**rev 01/14  
ORS 247.410, 247.420

→ Compare the questions below as they apply to your situation to help determine the eligibility to count your provisional ballot.

Elector Information			
First Name		Last Name	
New Residence Address			
City	State	Zip Code	County
Old Residence Address			
City	State	Zip Code	County

Complete Below for Presidential Only Ballot (ORS 247.410)			
Have you moved here from another state?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, what was the exact day/month/year you moved to Oregon?			
Have you voted for US President in another state for the nomination or election in which you are requesting a ballot?			
Primary	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
General	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

*I attest/affirm that:*

- The above is true and correct.
- I am qualified to register to vote in Oregon but I will have resided in the state for less than 20 days before the election.
- I have not voted for the nomination or election of the US President in another state during six months preceding this request.

Signature

Date Signed

## Appendix 11

# Sample HAVA Voter Registration Identification Letter

Office of Any County Clerk  
Elections Division

Voter Name  
Voter Address

Date

Dear,

\_\_\_\_\_ County Elections has received your voter registration card. However, we are unable to complete your registration because identification information required under federal law was not included with your registration application. **Until you provide this required information, your votes on federal offices, including President of the United States will not be counted.**

Under the Help America Vote Act of 2002 you must provide the applicable identifying information to be eligible to vote on federal offices:

**If you have a current, valid Oregon DMV Driver's License or Identification Card**

- your Oregon DMV Driver's License/ID number
  - ❗ The license or ID number must be current and valid.
    - ✓ a suspended license **is valid**
    - ✓ a revoked license **is not valid**

**If you do not have a current, valid Oregon DMV Driver's License/ID**

- the last four digits of your Social Security number
  - ❗ Be sure to select the box indicating you do not have a valid Oregon Driver's License/ID number.

**If you do not have a current, valid Oregon DMV Driver's License/ID or a Social Security number and are registering by mail**

- a current and valid photo identification **that shows your name**
  - ❗ If an expiration date is provided on the photo identification that identification must not have expired.

or
- a current utility bill, bank statement, government check, paycheck or other government document **that shows your name and address**
  - ❗ The address listed must match the residence or mailing address submitted on your voter registration card.- ❗ Be sure to select the box indicating you do not have a valid Oregon Driver's License/ID or a Social Security number.

You may provide this identification by submitting a new registration form including the required information by mail or in person at your County Elections Office.

**It is important that you act promptly.** Please contact our office at XXX-XXX-XXXX if you have any questions regarding this matter.

Sincerely,

County Elections Official

## Appendix 12

## Sample Voter Registration Inquiry Letters

### Notice of Incomplete Voter Registration

**Office of Any County Clerk**

Elections Division

Voter Name

Date

Voter Address

Dear,

We received your voter registration card in the mail on \_\_\_\_\_. It was determined upon review of the card that we need further information before we can process this registration. We have determined this for the following reason:

- Our records indicate that the residence address you listed on your voter registration card is actually a business address.
- Our records indicate that the residence address that you listed on your voter registration does not exist. We have been unable to verify the address as being a valid residence address in our County.
- Our records indicate that this may be a vacation residence and your permanent residence is elsewhere.
- Other Reason \_\_\_\_\_.

Oregon law states that a person's residence must be the place in which habitation is fixed and to which, when the person is absent, the person intends to return.

Please contact us at XXX-XXX-XXXX or provide us additional written evidence to consider in determining your eligibility. If we do not receive a response from you, it could result in rejection of your voter registration.

Sincerely,

County Elections Official

## Appendix 12a

## Sample Voter Registration Inquiry Letters

### Notice of Rejection of Voter Registration

**Office of Any County Clerk**

Elections Division

Voter Name

Date

Voter Address

Dear,

On \_\_\_\_\_, the \_\_\_\_\_ County Elections Office sent you a letter questioning your voter registration. Since a response was not received, we are rejecting your registration, as authorized by ORS 247.174(2).

You may apply to the elections office to request a hearing. The request must be received in our office no later than the 10th day from the date of this notice. We will then notify you of the date, time and location of the hearing. At the hearing, you may present evidence of qualification.

Sincerely,

County Elections Official

## Appendix 12b

## Sample Voter Registration Inquiry Letters

Notice of Hearing to Determine Voter Eligibility per ORS 247.174(3)

**Office of Any County Clerk**

Elections Division

Voter Name

Date

Voter Address

Dear,

We have received a request from you for a hearing to determine your qualifications as a voter in \_\_\_\_\_ County. Below is the date, time and location of the scheduled hearing. At this hearing, you may present evidence of qualification. Attached to this notice is a list of factors that can be considered in determining residency for a person.

If upon conclusion of the hearing, it is determined that you are qualified, your registration will be processed.

The hearing is scheduled for: \_\_\_\_\_ at \_\_\_\_\_ am/pm

The location of this hearing will be: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you have any questions, please call our office at XXX-XXX-XXXX.

Sincerely,

County Elections Official



## Sample Voter Registration Inquiry Letters

Voter Registration Inquiry *sent under ORS 247.195*

### Office of Any County Clerk

Elections Division

Voter Name

Date

Voter Address

Dear,

In reviewing our records, it appears that the residence address listed on your voter registration card may be inaccurate. Listed below is the information we show on your voter registration. If your name, residence address, mailing address, or political party has changed, you must update your registration. A voter registration card is enclosed for that purpose.

If this information is correct, please sign the statement at the bottom of this letter and return this letter to us.

If we do not receive a response from you by \_\_\_\_\_ (not later than the 20th day from the date of this notice), this may require further review and could result in your voter registration either being rejected or cancelled.

Name:

Residence Address:

Mailing Address:

Political Party:

If you have any questions, please call our office at XXX-XXX-XXXX.

Sincerely,

County Elections Official

#### Voter Attestation/ Affirmation

By signing this document, I attest/ affirm that:

- My name, residence address, mailing address (if different) and political party shown above are correct.

Signature

Date

## Appendix 12d

## Sample Voter Registration Inquiry Letters

Notice of Hearing to Determine Voter Eligibility per ORS 247.195(2) *sent under ORS 247.195(1)*

**Office of Any County Clerk**

Elections Division

Voter Name

Date

Voter Address

Dear,

On \_\_\_\_\_, the \_\_\_\_\_ County Elections Office sent you a letter inquiring into the validity of your registration. Since an adequate response was not received from you, a hearing will be scheduled so that you may present evidence of qualification. Attached to this notice is a list of factors that can be considered in determining residency for a person.

If upon conclusion of the hearing, it is determined that your registration is not valid, your voter registration will be cancelled.

The hearing is scheduled for: \_\_\_\_\_ at \_\_\_\_\_ am/pm

The location of this hearing will be: \_\_\_\_\_

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If you have any questions, please call our office at XXX-XXX-XXXX.

Sincerely,

County Elections Official

# Evaluating Signatures

*List of characteristics for evaluating entire signatures or individual letters/groups of letters*

## 1 Global/Overview Examination

Broad characteristics that are used to evaluate the entire signature as a unit instead of its individual parts:

- Type of writing
  - ✓ hand printed, cursive or a mix of the two
- Speed of the writing
  - ✓ Assess the appearance of the initial and terminal strokes – blunt or finely tapered
  - ✓ Assess the presence or absence of changes in pen pressure
- Line quality
  - ✓ Presence or absence of tremor
  - ✓ Presence or absence of a tracing guideline
- Skill level of the writer
- Style of the writing
- Overall size of the writing
- Overall spacing of the writing
- Overall proportions
- Slant/Slope of the writing
- Style and construction of connecting strokes
- Position of the signature on the signature line or baseline

## 2 Localized Examinations

Examinations of specific letters or combinations of letters within a signature:

- Size
  - ✓ Letters that are given preference in size or conversely, suppressed
- Internal spacing
  - ✓ between individual letters or letter combinations
- Proportions
  - ✓ Components of individual letters
  - ✓ Letter combinations
- Presence or absence of pen lifts
- Letters or letter combinations that have a divergent slant/slope
- Pinpoint characteristics that are distinctive within the writer's signature

## Sample Return Identification Ballot Envelope Oaths

**1** By Signing I certify that:

- I am the person to whom this ballot was issued;
- I am legally qualified to vote in the county that issued this ballot;
- This is the only ballot I have voted this election; and
- I still live at the address printed below.

**2** By Signing I certify that:

- I am the person to whom this ballot was issued;
- I am legally qualified to vote in the county that issued this ballot;
- This is the only ballot I have voted this election; and
- I still live where I am registered to vote.

**3** By Signing I certify that:

- I am the person to whom this ballot was issued;
- I am legally qualified to vote in the county that issued this ballot;
- I still live at the address printed on this envelope.
- I voted this ballot and this is the only ballot I have voted this election.

## Appendix 15

## Undeliverable Ballot Matrix

Ballots are required to be mailed to voters by nonforwardable mail with a reply requested if not deliverable as addressed by the USPS. Those Undeliverable Ballots include the following categories and the action required by county election officials.

Category of Undeliverable Ballot	Action to Take if Received:	
	By 8 pm on Election Day	After 8 pm on Election Day
Temporarily Away Refused – Attempt to contact No Mail Receptacle – Attempt to contact	Do not take any action on this group.	Do not take any action on this group.
Moved out of State or County Attempted Not Known Forwarding Order Expired Vacant Not At This Address Moved Left No Address Moved Left No Forwarding Unable to Forward Gone No Order No Forwarding Address Not Deliverable as Addressed (not an data entry error) Unclaimed	<b>Inactivate</b> voter registration record, changing <b>effective date of registration</b> to <b>election day or before</b> to deduct from eligibility pool for the election, whether done prior to or after election day, but prior to certification if have any 50% measures on ballot.	Do not <b>inactivate</b> until after <b>certification of election</b> . (OAR 165-007-0130 (3))
Forwarding address to Mailing or PO address within county Forwarding address from Mailing or PO address within county PO Box Change (except military) Box Closed-No Order	<b>Inactivate</b> voter registration record.	<b>Inactivate</b> voter registration record.
Forwarding Residential Address within County	Update voter registration record, changing <b>effective date of registration</b> to <b>election day or before</b> to include in correct eligibility pool for election, whether done prior to or after election day, but prior to certification if you have any 50% measures on the ballot.	Update voter registration record, changing <b>effective date of registration</b> to <b>after election day</b> to retain in original eligibility pool. (OAR 165-007-0130 (3))
No Such Number Insufficient Address Returned for Better Address Needs Unit #-Multi Unit Address	Need to research to determine if correct data entry for address from voter registration card and if a valid address within County. → If data entry error, correct voter registration record and mail back to voter. → If correct, and voter did not provide accurate address, <b>inactivate</b> .	Need to research to determine if correct data entry for address from voter registration card and if a valid address within County. → If data entry error, correct voter registration record. → If correct, and voter did not provide accurate address, <b>inactivate after certification of election</b> . (OAR 165-007-0130 (3))

## Appendix 16

## Return Identification Ballot Envelope Inquiry Letters

Notice of Unsigned Ballot Envelope *voter failed to sign the return identification ballot envelope*

**Office of Any County Clerk**

Elections Division

Voter Name

Date

Voter Address

Dear,

\_\_\_\_\_ County Elections has received your return identification ballot envelope for this election.

You did not sign your return identification ballot envelope as required by Oregon Revised Statutes. Your cast ballot cannot be counted unless you come into our office no later than 5:00 pm \_\_\_\_\_ (14 days from the date of the election) to sign your envelope.

Hours: 8 am-5 pm Monday-Friday

Election Day only: 7 am – 8 pm

If you have any questions, please call our office at XXX-XXX-XXXX.

Sincerely,

County Elections Official

## Appendix 17

## Return Identification Ballot Envelope Inquiry Letters

Notice of Non Signature Match *signature on return identification ballot envelope does not match voter registration record*

### Office of Any County Clerk

Elections Division

Voter Name

Date

Voter Address

Dear,

\_\_\_\_\_ County Elections has received a voted ballot for the \_\_\_\_\_ election, returned in a return identification ballot envelope that was issued in your name.

However, your ballot has been challenged because the signature on the return identification envelope does not match signatures contained in your voter registration record.

We have enclosed a new voter registration card for your convenience. Please complete the form and return it to our office by 5 pm on, \_\_\_\_\_ (14 days from the date of the election) or you may choose to update your signature in person by coming to our office at \_\_\_\_\_.

Your ballot will not count unless, after comparison, we can verify the signature on your return identification envelope matches the signature on your new voter registration card. If a new voter registration card is not returned by \_\_\_\_\_, your registration will be placed in inactive status. This means that you will not receive a ballot for future elections, or be qualified to sign petitions until you submit an updated registration card.

If you have any questions, please call our office at XXX-XXX-XXXX.

Sincerely,

County Elections Official