



Vote by Mail Procedures Manual

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Produced by the Secretary of State
In conjunction with the Oregon Association of County Clerks
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Notice

The Vote by Mail Procedures Manual and referenced forms are adopted by Oregon Administrative Rule 165-007-0030.

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Observers

Ongoing

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

Members of the public may observe all ballot processes (Except for any confidential election processes, i.e. challenged ballots).

The county elections official will determine the number of observers based on space and staff availability.

The elections official may conduct tours and/or access to the public for educational and/or media purposes, not classified as official observers.

ORS 254.482 See Appendix 1 for Sample Observer Rules.

Election Personnel, Facility Management and Supplies

Before the filing deadline

Analyze space needs.

If mailing preparation is done in-house, space for assembling the ballot packets will need to be considered. Depending on the size of ballot and number of extra materials, mail trays will hold approximately 200-250 ballot packets using a size #11 outgoing envelope. Various teams could be set up to help control the flow of materials and expedite the overall procedures:

- Control Team*
- Labeling Team*
- Packet Assembly Team*
- Support Team*
- Sort Team*

If inserting is performed at a mailing service, extra space may not be as critical.

Space will be required for sorting undeliverable ballots, since they should be reviewed immediately.

Space will be required for processing voted ballots:

- signature verification*
- precincting*
- problem ballots*
- opening envelopes*
- dropsite returns*

Equipment setup may require extra space, including space for a minimum of 3 voting booths.

Storage space: master list of electors (return identification ballot envelopes) must be retained for 2 years. ORS 254.535 and OAR 166-150-0035 (Exception– See Challenged signatures on page 33)

Analyze staffing needs.

If the election mailing preparations are to be done in-house, supervisors should be regular staff, free to float, whose only duty is to oversee the process.

If preparations are to be done at a mailing house service, on-site supervision will be required.

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).

Provide for signature verification training prior to election. The county clerk or the county's chief election official is responsible for ensuring 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.

**Before the filing
deadline**

Analyze equipment needs (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 (postnet barcode)
- insertion, folding and sealing machines
- printer
- postage meter
- automatic letter opener
- signature verification process and staffing
- sorting (alpha and by precincts)

Ongoing

Tally system maintenance.

The county elections official:

- 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:
 - Computer network
 - Computer program
 - Computer software
- and**
- Computer system ORS 246.565
- Shall keep a log of all maintenance performed on any component of the vote tally system after component is purchased and installed.

Analyze supply and postage needs.

Inventory & order envelope stock:

- 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.
- Military/Overseas envelopes.
- Available from the Secretary of State (SER 171 and SER 172).
- Refer to the Federal Voting Assistance Program for oath and envelope design.
- Window envelopes:
 - without tax wording; with tax wording requirements ORS 250.037(4), 250.038
 - with or without postal indicia
 - 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 returning instructions on envelope.
- Consider adding Reminder of when ballot must be received (i.e. Voted ballot must be received by 8 p.m. on Election Day or it will not be counted).

Refer to "Ballot Mailing Preparation" on page 13, Ballot Preparation/Issuing Ballots" on pages 14-17 and "Ballot Mailing and Post Office Coordination" on pages 18-20.

Before the filing deadline

Supply ordering and delivery:

- Mailing supplies should be ordered and received.
- Anything you can do in advance of the filing deadline should be done.
- It will provide for a more efficient operation if generic materials are ready in advance.
- 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).
 - Return ballot envelopes.
 - Secrecy envelopes.

NLT than the 30th day before election

Establish official dropsites for ballot deposit.

See "Official Ballot Dropsites" on page 21.

NLT 10 days before the election

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

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

- Prepare a list of any persons that will participate in the ballot counting process (opening envelopes, preparing ballots for counting and counting ballots); the list should include the person's party affiliation and be updated as needed.
- Make the list available for public inspection in the office upon request.
- Administer an oath to such personnel.

Confirm personnel are not a candidate on the ballot at an election, (other than an incumbent candidate for county clerk) or relatives, defined as a 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 or stepchild, of a candidate on the ballot at the particular election.

ORS 254.476

Voter Registration

Ongoing

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

Voter registration requirements are set out in ORS 247.

Date stamp cards on the date received on the top right-hand side of the registration card.

Transfer between counties within 5 days.

If a residence or mailing address update only, the information does not need to be signed by the voter. Counties may update information regarding 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.

Track and sort for changes and duplicate ballots beginning when Vote by Mail (VBM) addresses are printed.

Routine voter file maintenance should be done throughout the year.

HAVA requires that new registrants in the State of Oregon must provide identifying information to register to vote. If the registrant has a current, valid ODL/ID number, they must provide that number. If they do not have a current, valid ODL/ID number, they must provide the last four digits of their Social Security number. If they do not have a current, valid ODL/ID number or a Social Security number they must affirm this by attesting to this on the voter registration card.

In addition, if the registrant does not have a current, valid ODL/ID number or a Social Security number, they must affirm this on the voter registration card and they must provide a copy of one of the following showing their name and current address:

- valid photo identification*
- a paycheck stub*
- a utility bill*
- a bank statement*
- a government document*
- proof of eligibility under the Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA) or the Voting Accessibility for the Elderly and Handicapped Act (VAEH) See Appendix 11*

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 247.125

Ensure that effective date of registration is accurate.

Effective date of registration is the date a completed voter registration card was received (date stamped) by a county elections office, Secretary of State's office or a state agency receiving the card. To vote in an election a new registrant's card must be postmarked no later than the 21st day immediately preceding the election. ORS 247.012 (3)(b)

Registration cards received from voter registration drives must be 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. ORS 247.012(3)(b)

Online registrations are eligible if received by 11:59 p.m. on the 21st day before the election. ORS 246.021(4)(a)

ORS 247.012(3)(c) states the following regarding the effective date:

- In the case of a registration card missing a date of birth, containing incomplete date of birth or containing an unintentional scrivener's error that is supplied or corrected, on the date that registration would have occurred if the registration card had not been missing the date of birth, contained an incomplete date of birth or contained the scrivener's error, if the missing information is obtained or the error corrected.*
- In the case of a registration card 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.*

Process for Determining Voter Eligibility as it Pertains to Residential Address—New Registrations or Updates

1. *When a registration card is first received in the office, the county elections official must determine qualifications.*

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. ORS 247.035(1)(a)

Some factors to consider in determining residence (ORS 247.035(3)) 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*
2. *If the county elections official determines that the registration should not be accepted because of ineligibility, a notice that more information is required should be promptly sent to the person. See Appendix 12.*
 3. *If the person does not respond, a rejection notice is sent. See Appendix 12a.*
 4. *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.*

5. *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. See Appendix 12b. 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.

6. *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.*

ORS 247.174(3)

Inquiring into Validity—Current Registrations

ORS 247.195

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. See Appendix 12c.*
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. See Appendix 12d. 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.*
5. *If upon conclusion of the hearing, the county elections official determines that the registration is not valid, the registration shall be cancelled.*

Updates to Registration—Written Evidence from Post Office, other County Office or Mailing Notice (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. The notice must be forwardable and include a pre-paid postage return card. The notice must state the following: ORS 247.013(6)(b)*
 - *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. ORS 247.563(2)(c)*
2. *Upon return of the Voter Confirmation Card, the elector's registration can be updated. (does not apply to name changes)*

ORS 247.563.

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.

**December/
January**

Consider NCOA update with Post Office or possible mass registration confirmation.

Even if not required, these processes help to keep registration files updated. 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 information obtained.

Consider updating of address files with zip-plus-4 postnet barcodes – CASS Certification

All mass mailings of VCCs, VNCs, ballots, etc., qualify for 1st class Standard A or non-profit rates using barcoding and zip-plus-4 sort. Additional language may be required by USPS to qualify.

**95th day before
Primary and
General**

Generate Submarine ballots. ORS 253.565(4)

The Secretary of State will furnish a list of open offices for the next election so that the county elections official may prepare the ballot.

**NLT the 61st day
before any
election date**

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

See ORS 247.013(6)

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. ORS 247.013(7)

**March of even
numbered year**

Mail non-affiliated voter (NAV) notice if major party opens Primary Election.

Establish a procedure for tracking NAVs requesting major party ballots. The Secretary of State will inform counties no later than the 85th day before the Primary Election whether any party has opened its Primary. The party must notify the Secretary of State no later than the 90th day.

**Before mailing
ballots**

Produce mailing labels. "Labels" means whatever technique is used to address the envelope.

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

Tracking procedure for duplicate ballots must be instituted once labels are run.

Allow sufficient time for labeling and insertion processes.

For automated counties, a 'flag' or special status can be assigned to voters with late updates or party changes.

When more than one ballot is issued, you must ensure that only valid ballots are counted.

45th day prior to any election

Mail long term and military absentee ballots (including all out of country). Include form SEL 531 to all long term absent electors the ability to fax or email their voted ballot to the county elections office.

A tracking procedure for replacement ballots must be instituted. ORS 253.065 and 253.510

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.org and go to the "My Vote" button where you can track your ballot. Additional information for military and overseas voters is available at oregonvotes.org.

NST the 29th day before the election

Mail out-of-state ballots only.

Consider mailing with 1st class postage to ensure timeliness.

Consider different coding for out-of-state mailing addresses in order to be able to sort and mail these ballots early.

21st day before the election

Last day for new voters to register, last day to change party affiliation for the Primary Election (postmarks count), and last day for NAVs to request major party ballot if the party has chosen to open their Primary Election.

- Postmark applies for valid new and 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 5:00 pm the 21st day prior to the Primary Election.
- The Secretary of State will notify the counties if a major party has chosen to open their primary election no later than the 85th day before the date of the Primary Election. ORS 254.365 (3)(a)

After 21st day before the election

Run additional (supplemental) ballots.

After ballots are mailed

Sort undeliverables for postal errors, office errors and various unique ballots (i.e. returned to us in our own envelopes) and remail corrected ballots.

Sort the ballots for processing:

- deceased
 - temporarily away
 - new addresses in county
 - new addresses out of county/state
 - change of mailing address
- and**
- Moved Left No Address (MLNA), unable to forward, etc.

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.

In a 50% turnout election, process undeliverables in a manner to preserve eligibility determination.

**20th day
through
election day**

Process registration cards for postmark/date stamp to determine eligible and ineligible voters.

Mail ballot to qualified voters and keep ineligible cards separate.

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.

Voted ballots may not be emailed or faxed back to the election offices (unless the ballot is being returned by a long term absent elector provided in ORS 253.510).

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.

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).

When an elector requests and is qualified, issue a "Presidential only" ballot.

See ORS 247.410 and 247.435. See page 34.

Registration Between Counties

Any registration records processed need to be searched statewide for a potential duplicate.

Any potential duplicates need to be carefully reviewed for similar names, date of birth and comparison of signature.

The previous county may inactivate the voter registration if the county receives evidence the voter moved out of the county. If re-registering in the new county, the voter is automatically included in the new county's eligibility pool. See ORS 247.007(3) and OAR 165-007-0130.

If a voter has already cast a ballot in a previous county during the course of an election, the new registration card may be processed (For eligibility purposes, the voter can only be included in the county where the ballot was counted).

Ballot Issuing Based on Registration Status (Within or Between Counties)

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

- If the voter was previously inactive in any county issue a ballot.*
- If the voter was previously active and has voted in the previous county. See "Reception/Signature Verification and Sorting" subsection Handling Multiple Ballots" on page 29.*
- 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.*
- If the voter was previously active and has not yet voted in the current county reissue the voter a ballot.*

Reminder: *Should a voted ballot be received by more than one county, see "Reception/Signature Verification/Sorting" subsection "Handling of Multiple Ballots" on page 29.*

Printing Preparation

Before the filing deadline or as soon as possible

Arrange with printer for ballot printing.

Review ORS 254.115 through 254.195 and 254.470 and OAR 165-010-0090.

Advise vendor of ballot quantities and possibility of variations (ballot styles).

Consider possible weight limitations (printing instructions back-to-back will reduce the amount of paper and overall weight of the mail).

Consider different colors for different ballot types or districts. At the Primary Election, you must print ballots for the major political parties in different colors. ORS 254.195

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).

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 all counties if a major political party chooses to open their Primary Election to non-affiliated voters.

Finalize process for issuing precinct committeeperson ballots and for issuing major party ballots to NAVs, if applicable, for a Primary Election.

NLT the 61st day before the Election

If the office and/or measure is shared amongst counties and will appear on more than one county ballot certify the office within OCVR and notify in writing the other county of offices or measures that may be shared.

NLT the 84th day before the Primary or General Election

Arrange with printer for Voters' pamphlet production.

Review ORS 251.175, 251.315, 251.321, 251.325, 255.288 and OAR 165-022-0000 through 165-022-0080.

Counties have three options with respect to publishing a voters' pamphlet:

1. Do not publish a voters' pamphlet.
2. 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.
3. Publish a county voters' pamphlet and have it inserted in the Secretary of State's voters' pamphlet. This option is only available at an election for which the Secretary of State is required to publish a pamphlet.

Notify the Secretary of State of the county's intent to publish or not publish a county voters' pamphlet.

The Secretary of State will send a letter to each county asking if the county wants to do a joint pamphlet. The letter will provide timelines for publication.

→ **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

→ **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

Use the USPS Election Mail Logo on all election materials.

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

Before the filing deadline

Consider preparing a voters' pamphlet type of publication for military and other long term absentee voters or prepare a notice to be inserted with ballots for military and other long term absentee voters, which direct the voters to state or county websites to obtain voters' pamphlet information.

Use regular voters' pamphlet proofs if necessary.

Coordinate with other counties if the same candidate/measure also appears on their ballots.

Ballot Mailing Preparation

Before the filing deadline

Contact USPS and (if applicable) mailing house service.

Identify timelines and scheduling (may want to allow for possible delays).

Identify staffing needs at all stages of the process (on-site supervision is required).

Identify staging requirements (work areas for bar-coding, tray assembly, zipping/sorting, etc.).

Consider security issues.

Indicate how ballot transportation security needs are to be met (i.e. from office or vendor to mailing house or from mailing house to Post Office).

Specify various quality control issues (tracking and audit trails).

Establish method of addressing envelopes. Such as: formatting voter and address information envelopes vs. labels.

For inserts that may be needed, check with vendor on insert capability:

- secrecy envelopes;*
- return and military envelopes;*
- ballot (one or more);*
- text of ballot title or style if not printed on ballot;*
- local voters' pamphlet (if applicable);*
- map (if applicable); and*
- dropsite information (if applicable). See page 22 for further information.*

Arrange with Vendors to have supplies delivered.

→ 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).

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.

If this is a renewal of an existing tax increase the language 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. (This information 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. Ballots and voters' pamphlets cannot be ordered in advance, but your printing contract should be in place, including estimated quantities by this time.

- labels, if applicable for printing addresses for outgoing and/or incoming envelopes**
- local voters' pamphlets**
- other inserts such as dropsite locations**

Ballot Preparation/Issuing Ballots

NLT the 84th day before the Primary or General Election

Arrange with printer for ballot printing.

Review ORS 254.115 through 254.195 and 254.470.

Discuss possible quantities and different variations (ballot styles).

Consider possible weight limitations (printing instructions back-to-back will reduce the amount of paper and overall weight of the mailing).

Consider different colors for different ballot types or districts. Include required information and warning per ballot type.

For Primary Election, analyze the number of non-affiliated voters (consider buffering ballot quantities to accommodate for party changes or parties opening their Primary).

Determine process for issuing precinct committeeperson ballots and for issuing major party ballots to NAVs, if applicable, for a Primary Election.

Certify to other counties joint district and city filings.

NLT the 61st day before the election

If the office or measure is shared amongst counties and will appear on more than one county ballot certify the office within OCVR and notify in writing the other county of offices or measures that may be shared.

As measures are filed

Publish "Receipt of Ballot Title" and "Notice of Measure Election."

→ Only required for county and district measures. ORS 250.195 and 255.155 (The city and state publish their own measure notices.)

Before or NLT than the filing deadline

Set up the election in computer system.

Use Secretary of State's random alphabet list for candidates provided in the certification document or in OCVR. ORS 254.155 and OAR 165-010-0090

Reminder: During a Primary Election major parties and NAVs are coded in OCVR

Filing deadline

Order ballot styles

Review ORS 254.115 to 254.145, 254.195 and 254.470.

Refer to Secretary of State's Directive on party ballot colors for party nominations.

Order quantities to accommodate NAVs if a party opens Primary to include NAVs.

Remember, NAVs cannot vote on precinct committeepeople or any other offices excluded by the political party.

Consider extra quantities for voters who update their registration information between the 21st day prior to the election and election day.

Filing deadline

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; Warning required by ORS 254.470(5);
and
- 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.

Before printing

Proof everything!

Proof again!

ASAP after receiving printed ballots

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

Test as soon as possible after receiving printed ballots.

Reminder:

Test all ballot styles!

Test all precincts!

Perform every function to be used on election night!

See test procedures in Ballot Counting section. See page 46. The test deck may include logic and accuracy sample.

45 days before the election

Mail military and other long-term absentee ballots (includes all out-of-country).

Review ORS 253.045, 253.065 and 253.510.

Mail paper ballots if material from printer is not yet available. Include information and form SEL 531 for fax and email voting. ORS 253.690

Between 45th to 18th day before the election

Begin addressing process.

Addressing may be done by:

- inkjetting or laser printing information directly onto the envelope
 - using Cheshire labels (running label format on tractor-fed paper where a cut and paste machine glues the label onto the envelope)
 - using gum labels
- or**
- using form-fed (tractor-fed) envelopes
 - Addressing and inserting options:
 - In-house
- See "Analyze space needs" on page 2.

- Mail house
See "Analyze security needs" on page 24.

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

Consider color usage in following areas (always consider Post Office readability):

- ink color on envelope
- different envelope colors (or bands/stripes) for different ballot types
- different envelope colors for different elections; use colored bands/stripes instead of totally colored envelopes
- different colored ballots for different styles or parties
- different colors for different inserts
- different colors for address labels

ORS 250.037 and 250.038 require that a property tax increase or renewal notice be printed "clearly and boldly in red". See language requirement on page 13.

Consider using barcodes or OCR fonts for voter identification.

Use automated sorting of returned ballots (precincting) when possible.

**NST the 29th day
and NLT the 14th
day before the
election**

Mail ballots to out-of-state voters.

Consider using First Class postage to expedite delivery.

**21st day before
the election**

Deadline for new registrations.

New registrations must be postmarked by the 21st day before the election. Remember this only applies if the voter is not currently registered in Oregon. With OCVR, moving from one county to another within the state are only updates not new registrations.

**21st day before
the Primary
Election**

Last day to change party affiliation and last day for NAVs to request a major party ballot, if applicable, except as noted below.

Postmarks **do** apply for party changes.

Postmarks **do not** apply for NAVs requesting major party ballot. This request must be received no later than 5:00 p.m. on the 21st day prior to the Primary Election.

See ORS 254.470(3)(c).

**18th to 14th day
before or 20th day
for counties
without daily
postal service**

Mail all remaining ballots on date previously arranged with Post Office.

Uniform timeframe for mail out.

See ORS 254.470(3).

**Ongoing and prior
to election**

Process eligible registrations.

Check postmarks for eligible registrations. OCVR maintains a supplemental record and the original master record as they are updated:

- If possible, pull the original ballot from the mailing and send only the new ballot.
- If not possible, send a second ballot and make appropriate entry in the Oregon Centralized Voter Registration System which alerts the county elections official that a second ballot has been sent.

Reminder: See "Voter Registration" on page 5 for registration eligibility.

Issue provisional ballots to:

- Voters when eligibility cannot be determined.
- Voters who live in another county but want to vote in your county.

The non-residence county issues a ballot using a provisional ballot. After the person has voted, forward the provisional ballot with a completed provisional registration card to the county of residence, being sure to notify the other county that a ballot is being sent. ORS 253.135

See page 33 for processing provisional ballots.

Ballot Mailing and Post Office Coordination

Before ordering envelopes

Apply for non-profit indicia (imprinted permit number to show method of postage payment).

- Contact your local postal representative. Coordinate with USPS (preferably with the postmaster of your county).
- 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.
- Go over expected dates for delivery of ballots to voters.
- Inform USPS of date voted ballots must be returned to elections officials in order to be counted.
- Inform that if ballots are returned with insufficient or no postage, you will not accept them nor will you pay any postage due.
- 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.
- Discuss steps you can take, if any, to make processing more efficient for the USPS.
- Follow up with a letter to the postmaster documenting your conversation and agreements. Everyone is on the same page that way.

Coordinate with mailing house (if applicable)

- Establish method of addressing envelopes.
- Discuss timelines for providing addressing information to them, what information you want printed on the envelope/label, and the format of the printed information on the envelope.
- Communicate legal mailing dates and your expectations from mailing house.
- Request any specifics from them that you may be able to provide that would make the addressing/ mailing process more efficient for them.
- Follow up with a letter or email documenting your conversation and agreements.

Additional considerations:

- Is the mailing house inserting ballots and any additional inserts?
- If so, are ballots and additional inserts already folded?
- Or do they fold prior to insertion?
- Is county staff needed on site at the mailing house to ensure ballot styles are inserted correctly?
- Finalize ballot transportation security processes.
- Determine and solidify how ballot transportation security needs are to be met (from county office or vendor to mailing house or from county or mailing house to Post Office).
- Specify necessary quality control issues (tracking, audit trails) and communication.
- Onsite supervision is required at all stages of the process.

Talk with the Post Office about the options for return mailing address for the voted ballots.

Options include:

- your office address and zip plus 4
- the Post Office assigns a special "plus 4" for the elections office only
- use a Post Office Box

Before ordering envelopes

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

The Post Office's Mailing Requirements Section will review and assist with the proper wording and placement of endorsements on your envelopes as they apply to the Post Office. They will also provide a camera-ready copy of the front side of both outgoing and return envelopes for the printer. This will include, for the return envelope, the 11-digit barcode for your return address. This will not include your logo. You will need to add any logo.

Have the Post Office review the outgoing and return envelope sizes for postal rate conformity and the paper and ink colors for readability.

Always have the Post Office 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.

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

NLT 1 week after the filing deadline

Contact your postal Customer Representative to coordinate election mailings.

You may want to have direct contact with all local Post Offices within your county for ballot mailing coordination.

If you change return envelope colors for each election, it is recommended that you notify your Post Offices of the color change.

Consider other postal issues.

Other postal considerations:

- weigh the piece
- add printing on return envelope to tell voters if they need more than one stamp to return ballot
- redesign the return envelopes to reduce the need for additional postage
- measure the thickness to ensure it doesn't exceed .25 inches
- discuss undeliverables; based on the weight and envelope endorsement, the Post Office can give a cost per piece for undeliverables

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

→ **date:**

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.

→ **time:**

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.

→ **location:**

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).

**Before mailing
the ballots**

Prepare mailing.

Provide the Post Office with a "Sample" ballot packet for their inspection.

Obtain GPCs (carts) or pallets, trays or bags and proper tagging (such as postal tags) and signs.

Reminder: Use USPS Election Mail logo on all election-related materials.

Barcode the mailing.

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

Determine the number of mailings.

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

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

Determine what supplies are needed.

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 the Post Office 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 of mailing
ballots**

Coordinate a time with the Post Office to pick up the mail each morning.

Even if the return address is the elections office, you can arrange with the Post Office 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. Refer to "Security" on page 24.

**Before election
day**

Coordinate with the Post Office for pre-8 p.m. Election Day pick-up of ballots for your county.

If your county contains a USPS regional processing center, coordinate with the USPS for a pre-8 p.m. Election Day pick-up for all counties.

It is necessary to coordinate with the Post Office for the latest pick-up time for last minute returns before 8 p.m. 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.

Official Ballot Dropsites, Privacy Booths and Voting Assistance

**Prior to the
30th day before
the election**

Prepare for setting up official ballot dropsites.

Establish dropsites according to the Secretary of State's rule. ORS 254.470

Each county must have **no less than 2 dropsites** for every countywide election.

A dropsite must be maintained at each county elections office. In addition, for every countywide election, 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.

Designate placement of ballot box within dropsite building.

The following must be considered in placement of the ballot 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.

Ballot depositories shall be:

- locked and secure from being moved or tampered with.

At staffed locations (such as libraries, city halls, etc.):

- The official ballot drop box must be locked or sealed and accessible only by authorized personnel or deputized staff. The box may be exchanged for locked or sealed empty box on a predetermined schedule or it may be re-locked or re-sealed when emptied by authorized personnel;
- and**
- The official ballot dropsite must be in view of on-site staff and transported only by election or deputized staff to elections office on a predetermined schedule or as needed.

Outdoor mailboxes (drive-by or walking traffic):

- The official ballot dropsite is accessible only by key in possession of authorized personnel;
- and**
- Establish a predetermined schedule (or more frequently if necessary) to empty the dropsite. Transfer voted ballots in a locked or sealed ballot box, bag or pouch to the elections office.

Establish 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 p.m.

**30 days before
the election**

File Dropsite Plan. OAR 165-007-0310

- File a new or an updated dropsite plan with the Secretary of State 30 days prior to Election Day.
- Notify the Secretary of State of any change in dropsite locations after the original plan is filed.
- Include in the plan the number and locations of dropsites.

See Appendix 7, Dropsite Security Plan Form.

**Before the
election**

Notify the Public of Official Ballot Dropsites.

Publicize dropsite locations and hours of accessibility for each site. Counties may consider posting on the county website their dropsite locations.

Ensure dropsites are designated with "official" signage. **It is recommended that traditional "Vote Here" signs not be used to designate dropsites.** Only signs worded as follows should be posted at each dropsite:

- Official Ballot Drop Here
- Official Ballot Depository
- or**
- Official Ballot Dropsite

Reminder: Only personnel authorized by the county elections official may collect voted ballots within 100 feet from any ballot dropsite.

Instruct Personnel.

- If dropsite container has not yet been delivered instruct dropsite personnel not to accept ballots prior to delivery of secure dropsite container.
- Review procedures with dropsite personnel to ensure security of ballots at all times.
- Establish procedures for overnight security of ballots with dropsite personnel. Options may include:
 - using a room that will be locked
 - a vault

Determine the frequency of ballot pick-up from dropsites.

Designate personnel authorized to pick up ballots from dropsites.

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

On Election Day, the county elections official ensures authorized personnel are available at dropsites to determine that everyone in line at 8 p.m. is allowed to deposit their ballot. The authorized personnel are also to transport the ballots to the elections office.

If more than one person is used, it is recommended that they are of different political parties.

Consider dropsite ballots transported by law enforcement personnel or deputized personnel.

**When ballots
are issued to
Election Day**

Establish Voting Booths.

For every election each location where ballots are issued, must have 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

Establish Additional Voting Booths for Primary and General Elections.

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. ORS 254.474(1)(b)*

The county elections official determines the voting booth locations.

Each location with a voting booth must also be a designated dropsite.

ORS 254.474

**Before the
election**

Plan for assisting voters with disabilities.

In accordance with ORS 254.445, 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*

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. ORS 254.071

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.

Submit to the Elections Division any written voter education materials or a website link to your county elections website for posting on the Secretary of State's website.

Security

By January 31st of each year and within one business day of any change

Analyze security needs.

See Appendix 2 for a Sample Security Plan.

Any change in a Security Plan **must be submitted** to the Elections Division.

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).
4. Design security for ballots during scanning and/or processing.
5. Design security for ballot dropsites.
6. Establish guidelines for security involving observers.
7. Review office work area, building and ballot storage to assure security (alarms, cameras, special keys, limited keys).
8. Review security for vote tally systems, computer access security and off-site storage for system backups.
9. Consider having a "backup" county with the same ballot counting capabilities (may want to exchange backups of the election set-up).
10. Establish post-election ballot security.

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.
ORS 254.074 and 192.502(31)

Before the election

Establish security.

At all times, ballots **must** be maintained in a secure location in accordance with the security plan filed with the Secretary of State. Adequate supervision must be provided during all processing activities.

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.

If the ballots are kept in a separate locked room, it is not necessary to seal the transport carriers. If a secure room is not available, then ballots need to be secured in locked or sealed ballot container. Use disposable numbered locks if available. If ballots are being transported within the same building, it is not necessary to seal transport containers.

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

Establish supervision procedures and train staff.

Ensure that all election personnel follow standardized procedures.

Ensure that adequate staffing and space are available during the processing period. A manageable supervisor/staff ratio should be established and maintained for each election.

County elections officials may begin scanning ballots no sooner than the 7th day before the election if the county has received prior approval of the county security plan from the Secretary of State.

During the election

Maintain an audit trail.

There must be an audit trail throughout the process. Consider maintaining logs for processing the ballots through different steps. Maintain all statistical information for each precinct. This may include:

- election date*
- precinct number or name*
- number of ballots issued*
- number of ballots received*
- number of ballots counted*
- name, team number or person*
- date and time processed (if a precinct is processed more than once, the information needs to be maintained for the individual dates and times)*
- 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*
- number of ballots emailed or faxed*
- number of rejected ballots*
- number of defective ballots*
- number of unaccepted ballots*

Reception, Signature Verification and Sorting

**After ballots
are mailed**

Begin receiving voted ballots.

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

Start initial count or estimated count.

Staff at the elections office counts and records the number of:

- ballots returned by the Post Office
- ballots received over the counter
- ballots received from dropsites
- ballots forwarded to other counties
- ballots returned unsigned

and

- ballots returned undeliverable

For ballots returned undeliverable, see processes on page 9.

How to handle unsigned envelopes. Unsigned ballots are handled as a challenged ballot and are kept confidential.

If the ballot is returned in an unsigned envelope, the county elections official shall attempt to notify the voter that the **ballot cannot be accepted** unless the envelope is signed no later than 10 days after the election. **Counties should not inactivate a voter due to an unsigned envelope. A signature may not be faxed or emailed except by long term absent electors.** ORS 253.510 and 253.690.

The official will:

- have the voter sign the return identification ballot envelope at the elections office

How to handle 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 10 days after the date of the previous election.

See ORS 254.470(7) & (9).

**After ballots
are mailed**

How to handle a voter change of address on return identification ballot envelope.

Reminder: *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.*

*If a voted ballot is received but the voter made a change to their address on the return envelope, update the voter's record after the election and count the ballot in full.
ORS 247.563*

How to handle two signatures on one return identification envelope:

- *If there is more than one ballot and both voters from the same household signed the return envelope verify that the signatures match the voters' registration records and count both ballots.*
- *If signatures do not match the voters' registration records follow signature no match process on page 28. Signatures must be resolved no later than 10 days after the election if not resolved reject both ballots. (**Note:** Ballots have been cast therefore do not issue a replacement ballot.)*

**Within 48 hours
of receipt and no
later than the 3rd
business day
following the
election**

Begin transferring return ballot envelopes belonging to other Oregon counties.

Minimum standards include:

1. *Stamp date received on each return envelope or state if received on time or too late for election.*
2. *Maintain a log recording the date, county and number transmitted.*
3. *Fax or email the other counties of method of delivery and number of ballots being transferred.*
4. *Mail/deliver voted ballots using traceable mail delivery service (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.

**After ballots
are mailed**

Begin signature verification.

1. *When a ballot has been returned by the voter, it is included in the master list in OCVR for the election. If the return identification ballot envelope is unsigned the ballot is not accepted until the elector signs the envelope.*
 - *the master list and logs for tracking reissued, replacement and challenged ballots are maintained in OCVR*
 - *reissued and replacement ballots must be identified to ensure only the correct ballot is being counted*
 - *challenged ballots must be processed separately; see challenge process on page 32*
2. *Check for valid signatures.*
3. *Compare the voter's signature on the return ballot identification envelope to the signature on the voter's most current registration card. If the signature does not match the most current registration review all registration records in OCVR to make the determination.*

If the signature verification clerk is able to determine that the same person signed the return identification ballot envelope and a voter registration record that has been scanned into OCVR, the ballot may be processed.

**After ballots
are mailed**

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 signature on the state voter registration record:

1. *Agreement in style and general appearance, including basic construction, skill, alignment, fluency, and a general uniformity and consistency between signatures.*
2. *Agreement in the proportions of individual letters, height to width, and heights of the upper to lower case letters.*
3. *Irregular spacing, slants, or sizes of letters are duplicated in both signatures.*
4. *General traits and agreement of the most distinctive, unusual traits of the signatures.*
5. *Only a signature possessing obvious and predominantly matching characteristics with the signature on the voter registration record may be reviewed and determined to be a match by a single county elections official. A signature possessing one or more distinctive dissimilarities from the signature on the voter registration card 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. 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. See Appendix 13*

Signatures that Do Not Match the Registration Record

See page 33 for handling a challenge due to signatures not matching.

See Appendix 8 for signature verification samples.

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*

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 issue must be resolved no later than the 10th day after the election. ORS 254.426*
- *Voter should not be inactivated until after the 10th 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 for matching purposes.*

**After ballots
are mailed**

If the signature does not match the voter registration record and it appears another individual has signed a different name on the ballot: ORS 254.470(6)

- Unaccept the ballot
- Contact the voter as soon as possible to determine the appropriate resolution. Resolution will not be possible after 8 p.m. on Election Day.

If the county elections official is **unable to resolve the signature discrepancy issue** no later than 10 days after the election, determine cases that may need to be referred to the Secretary of State and forward information for further investigations. Make a copy of the return envelope for your records and send the original return identification envelope containing the signature in question. See "Challenge Due to Signatures Not Matching Process" on page 33.

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 p.m. 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.

Note: 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.

After election, once all ballots are collected:

- Remove activity from label that was actually received as person did not vote.

Note: 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 p.m. on Election Day.

If all ballots are turned in no later than 8 p.m., and the signatures match the voters' registration records count all ballots.

Handling 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. Always flag individual voter's file that more than one ballot was issued.

There was an error with the original ballot and the county elections official needs to reissue a ballot or issue a supplemental ballot.

Process and count in the following manner:

- If only the original ballot is returned by the voter, duplicate and count the ballot only for eligible contests.
- If the voter returns two ballots, count the reissued ballot.
- If only the reissued ballot is returned by the voter, count the reissued ballot.

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.

Reminder: 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.

Reminder: Include elector in 50% eligibility pool. Only applies to **March** and **September** elections.

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.

Process and count 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 by the voter, process and count the ballot reflecting the information on the most current registration record or most current information.

Reminder: Postmark does not apply for NAVs requesting a party ballot. The request must be received no later than 5 p.m. on the 21st day prior to the Primary Election.

An update is received changing the voter's address after the initial ballot labeling process is completed. A reissued ballot will automatically be mailed.

Process and count in the following manner:

1. Update is within the same county
 - If voter returns 1st ballot, hold until after election day to make sure voter does not vote 2nd ballot.
 - If voter does not return 2nd ballot, inactivate 2nd ballot (in OCVR).
 - Make 1st ballot active (in OCVR) and count ballot as is.
 - If voter returns 2nd ballot, count as is.
2. Update in different Oregon county (B)
 - If voter returns 1st ballot to County A, County A should hold until after election day to make sure voter does not vote County B ballot.
 - If voter does not return County B ballot, contact County B and have County B "inactivate" their ballot.
 - County A will need to re-activate their ballot and count as is.
 - If voter returns 2nd ballot to County B, count as is.

**After ballots
are mailed**

Replacement Ballots

A replacement ballot is issued when requested by phone, in writing or in person because the original ballot was destroyed, spoiled, lost or not received.

You may mark the envelope as a replacement ballot in one of three ways:

- specially printed "Replacement Ballot" return envelope;
see example in Appendix 3*
- with a rubber stamp or gummed label on an existing ballot return envelope adding additional voter attestation; see example in Appendix 4*
- any other indication on the outside envelope, accompanied by a separate attestation form*

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*
- mark the return identification ballot envelope clearly so that it may be readily identified as a replacement ballot*
- issue the replacement ballot by mail or other means*

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.

Note: *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 elections officer 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 p.m. on Election Day.

Reminder: *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.*

See ORS 254.470.

The county elections official may mail a replacement ballot with a letter of explanation in the following situations:

- If a voter returns an empty return identification ballot envelope.*
- If the voter is identified, but did not return the voted ballot in the return envelope.*
- If the ballot is returned damaged (e.g. the Post Office processing machine has torn the ballot).*
- The wrong voter in the same household signed the return identification envelope.*

Voter Change of Address on Return Envelopes

Process the ballot as is in which a voter has written a change of address on the return envelope and count the entire ballot.

If the new address is in a different county:

- And the voter has not re-registered in the new county, count the entire ballot for this election only (in accordance with NVRA).*

Precinct Sort

If a vote tally system requires sorting to produce results by precinct, sort return identification ballot envelopes by precinct before or after signature verification and logging ballots on the master list.

Store all voted ballots in secure area not accessible to the public.

Special Ballot Handling: Challenged and Provisional Ballots

**After ballots
are mailed**

Process Challenged Ballots.

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*
- *because a voter challenges another voter's eligibility to vote*
- or**
- *because the signature does not match the voter registration record; see page 33*

Challenge forms should be attached to the appropriate ballot envelope. Research for eligibility of the voter as soon as practicable and no later than 10 calendar days after the date of the election.

Challenges must be:

- *filed in the elections office*
- *filed on the appropriate form SEL 535*

Reminder: *A voter's ballot may be challenged at any time before the ballot is removed from its return envelope for processing.*

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.*

Inform the voter that the ballot will not be counted unless the voter can demonstrate their eligibility no later than the 10th calendar day after the date of the election. Based on the results of the inquiry:

3. *As soon as practicable, but no later than the 10th 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.*
4. *Tally only the contests for which the voter is qualified to vote for party affiliation changes only in the Primary Election.*

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.

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

**After ballots
are mailed**

Handling a challenge due to signature not matching (an elector's signature may only be challenged by a county elections official).

If the signature does not match the voter registration record send a challenge notice and a new registration card to the voter indicating that the signature does not match. The challenge must be resolved no later than the 10th calendar day after the date of the election. If no response, place the voter into an "inactive" status after the 10th day after the election.

- *If the voter returns the registration card or provides sufficient evidence that the voter signed the return identification ballot envelope, count the ballot.*
- *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.*

If the signature does not match the voter registration record and it appears that another individual has signed a different name on the return identification ballot envelope:

- *Unaccept the ballot.*
- *Contact the voter as soon as possible to determine the appropriate resolution.*
- *Resolution will not be possible after 8 p.m. on Election Day.*

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 ORS 246.046 and 260.715.

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.*
- *If no response and it appears to the county elections official that someone other than the voter signed the return identification envelope, elector's information may be forwarded to the Secretary of State's Election Division for further investigation.*

Process Provisional Ballots. (Also see page 17 for when to provide a provisional ballot.)

Confirm whether the voter has already voted and whether the voter meets eligibility requirements of state and/or federal law. This includes ballots issued where eligibility is questioned and ballots issued to a voter who is registered in another county.

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.

Process the ballot in the correct precinct after the voter's eligibility is confirmed.

When the voter lives in another county, have the voter fill out a (provisional) registration card. 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.

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

Presidential Contest Only ORS 247.410-247.435

*If a person is qualified to register, except the person has resided in Oregon less than 20 days before the election, the person 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 a person eligible to vote under ORS 247.410–247.420 shall be marked “Presidential Only. An eligible voter must complete form SEL 525. See Appendix 10 for sample

Persons eligible are required to:

- appear in the office of the county elections official*
- complete a provisional registration card*

If an elector of Oregon moves to another state 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, voter may vote for these offices in Oregon.

Validate the qualifications of the voter prior to counting the ballot.

Opening Return Identification Ballot Envelopes

**NST 7 days
before the
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.

Process ballots from only one precinct or batch at any one workstation at a time. OCVR will keep a record of the number of return identification ballot envelopes accepted. Counts may be automated if sorting equipment is being used. Once the ballots have been removed from the return identification envelopes count the ballots. The total should match the OCVR total.

May begin scanning ballots if the county has received approval from the Secretary of State as required in OAR 165-007-0310.

Staffing

Election personnel opening envelopes, preparing ballots for counting and counting ballots may not be a candidate who is listed on the ballot or a relative of a candidate on the ballot in that particular election. "Relative" means a spouse, child, son-in-law, daughter-in-law, parents, mother-in-law, father-in-law, sibling, brother-in-law, sister-in-law, aunt, uncle, niece, nephew, stepparent or stepchild. This provision does not apply to an incumbent county clerk in the conduct of the clerk's statutory duties. ORS 254.476

Each board member must sign an oath prior to processing ballots at each election.

Opening boards must be composed of a minimum of two members, not all of the same political party.

A record must be maintained of all board members, including each member's political party affiliation, oath and board assignments.

Consider maintaining a log of which boards process which precincts or batches.

The county elections official must provide written procedures and training in those procedures prior to each election to ensure consistent application of processes.

Opening Boards

Process one precinct or batch at a time.

1. Open the return identification ballot envelope and remove the secrecy envelope containing the voted ballot.
 - If the return identification ballot envelope was sealed and contains a ballot with or without a secrecy envelope, **continue processing.**
 - If the return identification ballot envelope contains a ballot without a secrecy envelope, remove the ballot and maintain the secrecy of the ballot.
 - If the signed return identification ballot envelope is unsealed **continue processing.**
 - If the secrecy envelope is unsealed, verify the voter's signature with the voter registration record. If signature matches, **continue processing.**
 - 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.

Place rejected ballots in the “rejected ballots” envelope.

2. *Open the secrecy envelope and remove the voted ballot.*
3. *If there is no ballot enclosed, log as an empty ballot envelope or refer to the election supervisor for instructions.*
4. *If the ballot is from a different election, reject the ballot.*
5. *If there are two ballots enclosed in one envelope and only one signature on the return identification envelope reject both ballot.*

Reminder: *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 the
election**

Begin inspecting ballots. ORS 254.470(8)

In all cases inspection boards must determine whether ballots should be counted, rejected or duplicated. The object of ballot inspection is to ensure that all ballots are machine-readable and that the 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.

All counties need to inspect ballots to determine voter intent. The responsibility for determining voter intent lies with the inspection board, under the supervision of the county elections official. In counties using digital vote tally systems, ballot inspection and resolution is performed on a computer. In either instance, ensure that a team of at least two board members of differing political party affiliation work together to determine voter intent.

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. ORS 254.505.

*If ballots are counted by precinct, process ballots one precinct at a time. All rejected ballots **must** be accounted for on log sheets or as directed by the county elections official and placed in the "rejected ballot" envelope.*

Use guidelines for staffing in the "Opening Return Identification Ballot Envelopes" section on page 35.

Counties Using Scanning Equipment

→ **Inspecting**

Check for questionable marks and write-in votes during the same inspection.

Questionable marks are:

- 1** marks that cannot be read by the ballot counting equipment
 - 2** a checkmark or an "X" in the voting area
 - 3** voting area completed too lightly
 - 4** voter's choice not marked in the voting area
 - 5** extraneous marks made by the voter in the header code, clock areas or other scanned areas
 - 6** marks indicating the voter's change of mind
- and/or**
- 7** comments marked in the voting area

Inspect entire ballot and sort into appropriate stacks:

- clearly marked machine-readable ballots (they can be placed in the container, ready for counting)
- ballots with questionable marks
- ballots with unmarked write-ins with voting area not completed
- ballots that can be enhanced
- ballots that must be duplicated

→ **Enhancing**

Reminder: Process one ballot at a time during this and subsequent steps to avoid confusion about what has or has not been enhanced or duplicated.

Questionable marks **2,4,5,6** and **7** may require that the ballot be duplicated/enhanced.

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 **1,2,3** and **4**
- placing enhancement, when appropriate, over questionable marks **4,5,6** and **7** that affected ballot readability

Reminder: An enhancement will cover the marks, making the mark unreadable to the ballot counter. The enhancement must be removable so the voter’s vote can be reviewed during a recount.

Enhanced ballots are added to the ballots in the container ready for ballot counting.

Determining Voter Intent

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 counted.

If it is possible to enhance the ballot, use the enhancement process. If enhancement is not possible, duplicate the ballot.

If the inspection board cannot determine the voter’s intent, the ballot should not be duplicated but processed as is. ORS 254.505

Voter intent in any single contest may not be determined based upon a pattern of partisan voting on the ballot.

If a 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:

- follow instructions for **duplicating** a ballot to reflect the intent of the voter **and**
- place duplicate number on all associated pieces and place together in the “defective and irregular” envelope

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.

If a note is included that is not relevant to voter intent, do not retain the note.

Scanning Ballots

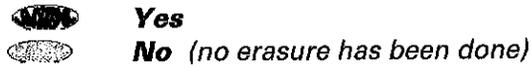
Only official ballots can be counted. See ORS 254.185.

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.



Enhance (white sticker) the erasure so that the scanner only "sees" 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.



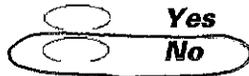
Since there is no attempt to erase either mark, leave as is and allow scanner to count as an overvote.

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



Mark may or may not have some erasure—usually there is none. Enhance 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.



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.

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



Enhance 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
No



Yes
No

not this

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
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, leaving all voting areas uncompleted to indicate an undervote.

Corrections are made with liquid white-out.



Yes
No

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

Machine-Rejected Defective Ballot Resolution

Ballots that are not machine-readable must be inspected. The inspection process should consist of at least two election board members, each of a different political party affiliation.

Machine-rejected ballots are defective ballots that are 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.

These ballots are out-stacked while the machine is in standard counting mode and may not have been previously caught by inspection boards.

If the vote tally system requires sorting by precinct, then elections personnel will only inspect one precinct of "unread" defective ballots at a time.

See "Enhancing" on page 38 and "Duplication" below.

Duplication

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 each with a different party affiliation. Each worker must initial both ballots.

- 1. Sort by ballot style if there are multiple ballot styles for the precinct.*
- 2. 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.*
 - 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.*
- 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).*
 - 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.*
- 5. Use a control log to track the assigned numbers.*
- 6. One board member or team duplicates the entire ballot accurately reflecting the voter's intent and initials both ballots.*
- 7. 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 "Defective Ballot Envelope" for that precinct or batch processing.*

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 "Defective Ballot Envelope" for that precinct.
- If the material has no bearing, discard the material.

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

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.

Per ORS 254.505(1), "If it can be ascertained from the ballot for whom the vote was intended" it should be counted.

Follow the enhancing and duplicating instructions from the previous pages, when necessary, for all write-in examples.

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



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 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.



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 or duplicate the ballot so the vote is counted as a vote for the selected candidate.

A real or fictitious name is written-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). The Board shall not attempt to determine whether the name is real or fictitious. If a write-in is questionable, the write-in name provided may be validated against the voter registration file within the district if contest is not landowner qualified.

If no such registered voter exists, tally as a miscellaneous vote. For example, 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 tallied 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.

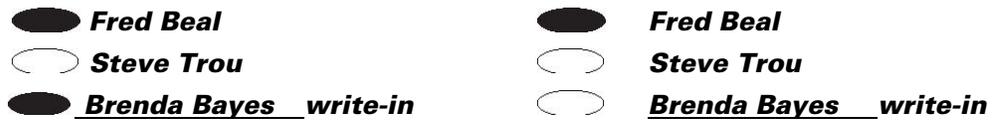
→ **Paper Ballot**

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.



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

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



The vote is counted as a vote for the candidate.

- **Paper Ballot**
Tally as a vote for selected candidate.
- **Scanning**
Enhance 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.



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**
Enhance 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.



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**

Enhance 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.

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

Fred Beal
 Steve Trou
 I don't like any write-in

Fred Beal
 Steve Trou
 Steve 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, hand tally as vote for selected candidate.

→ **Scanning**

Enhance or duplicate so vote is as a vote for the selected candidate.

Ballot Counting

**NST 7 days
before the
election**

County elections officials may begin early scanning of ballots as long as the county has provided a security plan that provides a plan for security of the ballots and has received approval from the Secretary of State to conduct early scanning. County must **conduct** a preparatory test of the vote tally equipment for logic and accuracy.

**NLT 5 business
days before the
election**

Conduct preparatory test of the vote tally equipment for logic and accuracy to ensure that each ballot format, where appropriate, correctly tallies ballots in each electoral contest by precinct.

Note in the maintenance log any maintenance performed during the period that occurs after the preparatory test and before the final public certification test.

Counties must use the current election ballots for the test deck.

Conduct a public certification test using a selection of precincts, ballot formats and electoral districts from the preparatory test.

Send notice of time and place of the first public certification test to political parties that have requested notification.

ORS 254.235.

Election Day

Repeat public certification test of vote tally equipment before counting ballots if you have not started scanning ballots seven days prior to the election.

Perform exactly the same test as conducted in the previous public certification test. ORS 254.485.

Observers may be present.

The ballots shall be transported to the count center in a sealed container when the count center is located in a separate building.

Begin counting ballots.

Once ballot counting begins, count 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*

Reminder: *The post 8 p.m. Election Day tally in any county may only be suspended with prior approval of the Secretary of State in an emergency situation.*

Once all ballots are counted and reconciled, but before the final results of the election are certified or the vote tally system is shut down

Repeat public certification test of vote tally equipment.

Use the same selection of precincts, ballot formats and electoral districts as was performed at the election day public certification test. ORS 254.525

Observers may be present. ORS 254.482

Remember to distinguish in tally system maintenance log all maintenance performed after the preparatory test and before the final certification test.

Log everything.

Certify the results of the test.

Within 48 hours of receipt and NLT the 3rd business day following the election

Begin transferring return ballot envelopes belonging to other counties as appropriate.

Minimum standards include:

1. Stamp date received on each return envelope or state if received on time or too late for election.
2. Maintain a log recording the date, county and number transmitted and the voters/ballot ID number.
3. Fax or email the other counties of method of delivery and number of ballots being transmitted.
4. Mail/deliver voted ballots using traceable mail delivery service (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 no later than the 3rd business day following an election.

Other states' ballots cast by Oregon voters in other states must not be counted in Oregon. Take no action on these ballots.

NLT 10 days after the election

Resolve all challenged ballots.

Process eligible challenged ballots.

Prior to certification

Resolve all provisional ballots.

Upon completion of the ballot count and prior to certification

Reconcile the ballots.

Compare the number of ballots processed to the return identification ballot envelope counts or computer voter history log for the precinct.

If the counts do not match, the county elections official reconciles the totals to resolve the discrepancies prior to certifying the election results. Prepare abstracts to be delivered.

NLT 20 days after the election

File abstract of votes with the appropriate elections officials.

NLT 30 days after the March and September election

Complete calculation of percentage of voter turnout as provided in OAR 165-007-0130.

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

NLT the 30th day after the election

Electronically transmit results for each contest by precinct to the Secretary of State. ORS 254.545 (7)

NLT the 45th day after the election

Post election notices of rejected ballot.

Notify the voter of the reason why the voter's ballot was not counted if the ballot was received by the 10th day after the election. The notice shall include information about the reason the ballot was rejected and what the voter could do to ensure that ballots in future elections will be counted.

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 10 days after the election

See Appendix 9 for sample Notices of Rejected Ballot.

Ballot Storage

After the election

Seal and store ballots.

Seal and store all ballots, including ballots “received too late,” provisional and challenged ballots:

- *For all elections—2 years following the election.*
- *Review Archive Retention Rules—OAR 166-150-0035.*

Store undeliverables and secrecy envelopes for 60 days after the last date to contest the election.

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. (See page 29, return identification envelopes involved in potential election law violation.)

Reminder: *Consider storing ballots by precinct for recount purposes.*

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)*

GLOSSARY

Ballot Cast	<i>A ballot that has been deposited into an official dropsite, the USPS mail or submitted to the county elections office.</i>
Challenged Ballot	<i>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.</i>
County Elections Official	<i>The county clerk or the county official in charge of elections.</i>
Defective Ballot	<i>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.</i>
Duplicate Ballot	<i>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.</i>
Duplication Board	<i>Persons performing the task of duplicating ballots.</i>
Effective Registration Date	<i>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.</i>
Enhance	<i>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.</i>
HAVA ID Ballot	<i>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.</i>
HAVA ID	<i>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)</i>

Inspection Board

Persons who perform the task of inspecting ballots after the ballots are removed from the secrecy envelopes and before the ballots are counted.

Issue Date for VNC

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.

**Long Term
Absent Elector**

As defined in ORS 253.510 and 253.530, a long term absent elector is 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.

Machine-Rejected Ballot

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.

Master List

The names of all voters to whom ballots were mailed. The list can be an electronic file from OCVR or hard copy.

MOVE

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.

Non-Affiliated Voter (NAV)

An elector who has chosen not to be a member of any political party as indicated on the voter registration card.

Opening Board

Persons performing the task of removing ballots from the return identification and secrecy envelopes.

Observer

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.

**Original
Registration Date**

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.

Provisional Ballot

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.

Reissued Ballot

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.

Rejected Ballot

Ballots that have passed signature verification but which cannot be counted because of other problems.

Replacement Ballot

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.

Return Identification Ballot Envelope

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.

Spoiled Ballot

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 p.m. on Election Day.

Supplemental Ballot

An additional ballot that is issued to voters due to a correction in or an addition to the original ballot sent for that election.

Transaction Date

The date a modification of any kind is made to a voter record in the voter registration module (other than a merge).

Unaccepted Ballot

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 p.m. on Election Day.

UOCAVA

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.

Voided Ballot

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, such as when another person has signed the return identification envelope with a different name and a new ballot should be issued to the voter. In these cases, the original ballot should return to the "sent" status in OCVR.

**Voter Notification
Card (VNC)**

a.k.a. Precinct Memorandum Card ORS 247.181. A notice mailed to a new registrant or a voter who has updated their registration.

**Voter Confirmation
Card (VCC)**

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

<i>BT</i>	<i>Ballot type</i>
<i>CASS</i>	<i>Certified Address Street Service</i>
<i>DMV-COA</i>	<i>Department of Motor Vehicles-Change of Address</i>
<i>FPCA</i>	<i>Federal Postcard Application</i>
<i>FVAP</i>	<i>Federal Voting Assistance Program</i>
<i>GPC</i>	<i>General Postal Card</i>
<i>HAVA</i>	<i>Help America Vote Act</i>
<i>LPB</i>	<i>Large Print Ballot</i>
<i>L&A</i>	<i>Logic and Accuracy Test</i>
<i>MLNA</i>	<i>Moved Left No Address</i>
<i>MOVE</i>	<i>Military and Overseas Voter Empowerment Act</i>
<i>NAV</i>	<i>Non-Affiliated Voter</i>
<i>NCOA</i>	<i>National Change of Address</i>
<i>NLT</i>	<i>Not Later Than</i>
<i>NST</i>	<i>Not Sooner Than</i>
<i>NVF</i>	<i>Number to Vote For</i>
<i>NVRA</i>	<i>National Voter Registration Act</i>
<i>OAR</i>	<i>Oregon Administrative Rule</i>
<i>OCR</i>	<i>Optical Character Recognition</i>
<i>OCVR</i>	<i>Oregon Central Voter Registration System</i>
<i>ORS</i>	<i>Oregon Revised Statute</i>
<i>PCT</i>	<i>Precinct</i>
<i>SOS</i>	<i>Secretary of State</i>
<i>SFTP</i>	<i>Secure File Transfer Protocol</i>
<i>UOCAVA</i>	<i>Uniformed and Overseas Citizens Absentee Voting Act of 1986</i>
<i>USPS</i>	<i>United States Postal Service</i>
<i>UPS</i>	<i>United Parcel Service</i>
<i>VBM</i>	<i>Vote by Mail</i>
<i>VCC</i>	<i>Voter Confirmation Card</i>
<i>VNC</i>	<i>Voter Notification Card</i>
<i>VP</i>	<i>Voters' Pamphlet</i>
<i>VRC</i>	<i>Voter Registration Card</i>

Sample Oregon County Ballot Security Plan

This sample county ballot 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)

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 is 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.

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.
See Observers Rules, Appendix 1 of VBM directive.

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 must address security of system during 7day 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.

See for an example—VBM directive, Appendix 1, Observers Rules.

XIII Emergency Circumstances

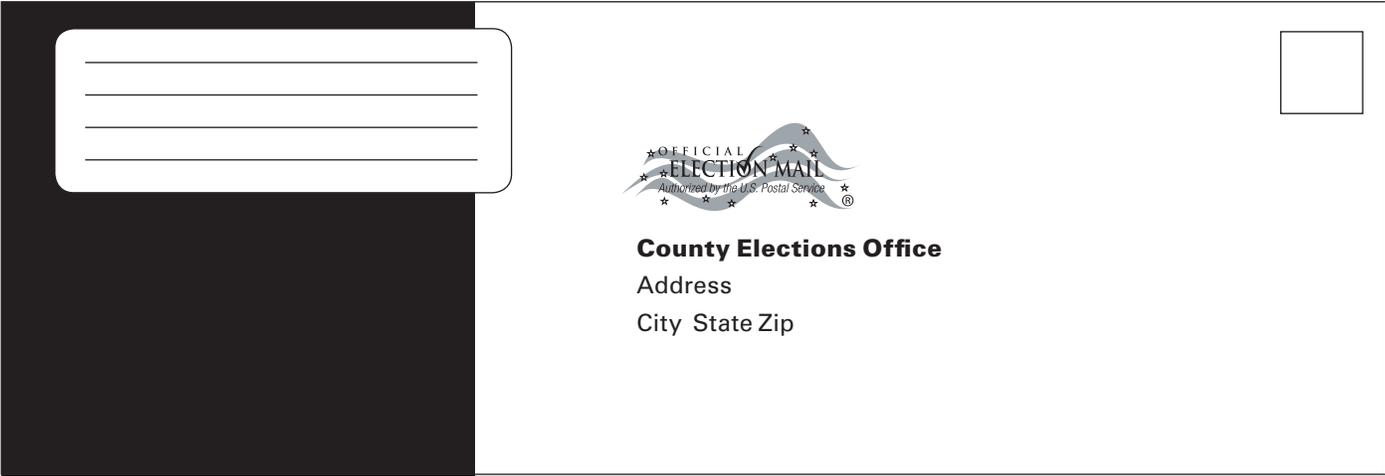
→ Include in a county security plan any plans to handle ballot processing and security of such, in the event of various emergency circumstances.

XIV Prevention of early release of scanned ballot results

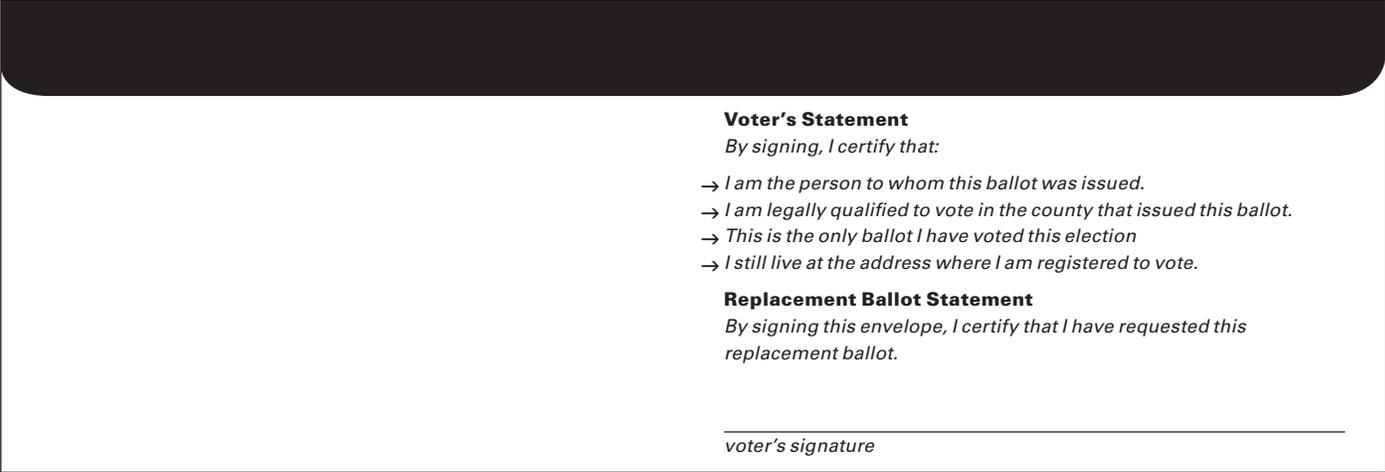
→ A county security plan must address prevention of a premature release of vote tally information .

Sample Replacement Ballot Return Envelope, Specially Printed

front of sample envelope *not to scale*



back of sample envelope *not to scale*



Sample Replacement Ballot Return Envelope, Rubber Stamp

front of sample envelope *not to scale*

<hr/> <hr/> <hr/> <hr/>	REPLACEMENT BALLOT	
Ballot Return Envelope		
<i>ballot enclosed</i>	County Elections Office Address City State Zip	

back of sample envelope *not to scale*

REPLACEMENT BALLOT
Voter's Statement <i>By signing, I certify that:</i> → 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.
Replacement Ballot Statement <i>By signing this envelope, I certify that I have requested this replacement ballot.</i>
<hr/> <i>voter's signature</i>

Sample Vote by Mail Challenge Form

Vote by Mail Challenge Form

SEL 535
rev 1/06: ORS 254.415

Radio buttons for Election Official and Elector

Fields for precinct number and challenge number

Oath of Voter Making Challenge

print name of person being challenged ... is challenged as a qualified voter for the following reason:

Signature line for elector making challenge

signature of elector making challenge

address of elector making challenge

Reminder

For an election conducted by mail a person's ballot may only be challenged before the ballot is removed from its return envelope for processing.

Signature of County Elections Official

Subscribed and affirmed before me this ... day of ..., 20...

signature of County Elections Official

Sample Provisional Ballot Return Envelope

front of sample envelope *not to scale*

<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Provisional Ballot Return Envelope</p> <p><i>provisional ballot enclosed</i></p>	<div style="text-align: right; border: 1px solid black; width: 50px; height: 40px; margin-bottom: 20px;"></div> <div style="text-align: center;"><p>County Elections Office Address City State Zip</p></div>
--	--

back of sample envelope *not to scale*

Provisional Ballot Return Envelope	
election date _____	Voter's Statement <i>By signing, I certify that:</i>
precinct _____	ballot type _____
voter's name _____	<ul style="list-style-type: none">→ 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.
	_____ voter's signature

Sample Dropsite Security Plan

Any County, Oregon

Date of Election

Official Sites for Ballot Deposit Security Plan (Dropsites)

date/hours	transport security/ frequency of collection	security <i>include whether box is supervised and/or permanently mounted</i>	other security measures <i>(ie. daily supervision of box, security cameras, etc)</i>
Bear City Recorder's Office			
10/20-11/6 Usual business hours; 11/7 until 8pm	Mondays, Fridays and Election day in the morning, afternoon and during 8pm 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.
Saxon City Recorder's Office			
10/20-11/6 Usual business hours; 11/7 until 8pm	Mondays, Fridays and Election day in the morning, afternoon and during 8pm 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.
Olympian City Recorder's Office			
10/20-11/6 Usual business hours; 11/7 until 8pm	Mondays, Fridays and Election day in the morning, afternoon and during 8pm 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.
Duck City Recorder's Office			
10/20-11/6 Usual business hours; 11/7 until 8pm	Mondays, Fridays and Election day in the morning, afternoon and during 8pm 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.
Green Leaf Park District Office in Whoville			
10/20-11/6 Usual business hours; 11/7 until 8pm	Mondays, Fridays and Election day in the morning, afternoon and during 8pm 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
Any County Clerk's Office in lobby of County Courthouse			
10/20-11/6 Usual business hours; 11/7 until 8pm	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.
Drive Through Drop Box in East Parking Lot of Courthouse			
10/20-11/6 24-hour access; 11/7 until 8pm	Daily	Locked and anchored to the ground.	Ballots may be deposited without leaving the car.
Drive Through Drop Box in East Parking Lot of Courthouse			
10/20-11/6 24-hour access; 11/7 until 8pm	Daily	Locked and anchored to the ground.	Ballots may be deposited without leaving the car.

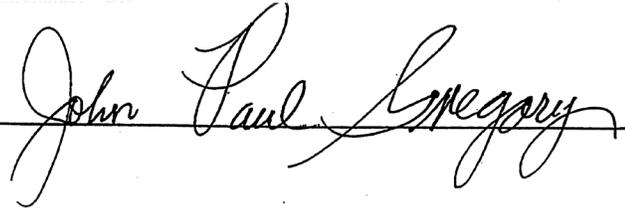
County Elections Official:

Date:

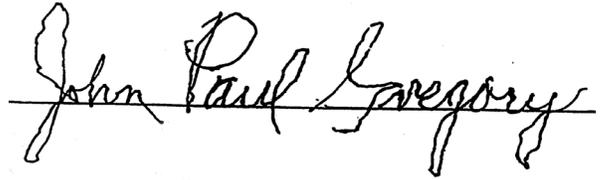
Sample Signature Verification Problems

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

1

A handwritten signature in cursive script that reads "John Paul Gregory". The signature is written on a horizontal line and is relatively fluid and connected.

2

A handwritten signature in cursive script that reads "John Paul Gregory". This signature is noticeably less fluid and more disjointed than the one in box 1, with some letters appearing more rigid or less connected.

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

1

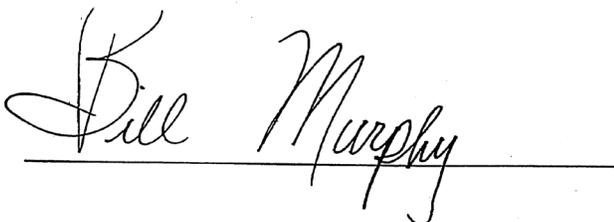
A handwritten signature in cursive script that reads "Frank D. Conklin". The signature is written on a horizontal line and is quite fluid and connected.

2

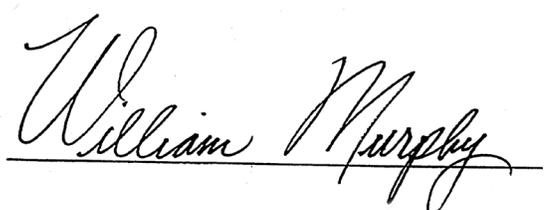
A handwritten signature in cursive script that reads "Frank D. Conklin". This signature is noticeably less fluid and more disjointed than the one in box 1, with some letters appearing more rigid or less connected.

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.

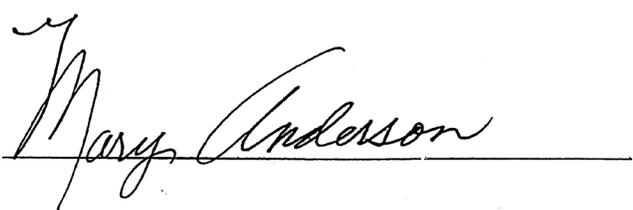
1

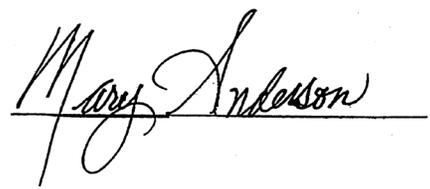
A handwritten signature in cursive script that reads "Bill Murphy". The signature is written on a horizontal line and is quite fluid and connected.

2

A handwritten signature in cursive script that reads "William Murphy". This signature is noticeably less fluid and more disjointed than the one in box 1, with some letters appearing more rigid or less connected.

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).

1 

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.

1 

2 

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

1 

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 8pm 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 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. You must provide the required identification information. **Until you have provided this required information, your votes on federal offices, including President of the United States will not be counted.**

You may send in a new registration form including the required information. Or, you may register online at: oregonvotes.org.

The federal **Help America Vote Act of 2002** now requires individuals registering to vote in federal elections to provide the following identifying information with their registration application:

- If you have a current, valid Oregon DMV Driver’s License/ID, you must provide that number.
- If you do not have a current, valid Oregon DMV Driver’s License/ID, you must check the appropriate box on the registration form and provide the last four digits of your Social Security number.

If you do not have a current, valid Oregon DMV Driver’s License/ID or a Social Security number, you must check the appropriate box on the registration form. In addition, if you do not have a current, valid Oregon DMV Driver’s License/ID or a Social Security number and you are registering by mail, you must check the appropriate box on the registration form and provide a copy of one of the following:

- 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.

This identification must be received in order to complete your registration for the next Federal Election (an election in which a federal candidate is nominated or elected).

You may provide this identification:

- by mail
- or**
- in person at your County Elections Office

It is important to act promptly.

Please contact our office at XXX-XXX-XXXX if you have any questions regarding this matter.

Sincerely,
County Elections Official

Sample Voter Registration Inquiry Letters

Office of Any County Clerk

Elections Division

Notice of Incomplete Voter Registration

this should be sent if questioning new voter registration cards or updates under ORS 247.174(2)

Date

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

Office of Any County Clerk

Elections Division

Notice of Rejection of Voter Registration

this should be sent if questioning voter registration per ORS 247.174(2)

Date

Dear,

On (date), the (County name) 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

Office of Any County Clerk

Elections Division

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

this should be sent if voter requests a hearing under ORS 247.174(3)

Date

Dear,

We have received a request from you for a hearing to determine your qualifications as a voter in (County name) 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 _____ a.m./p.m.

The location of this hearing will be: _____

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

Sincerely,

County Elections Official

Office of Any County Clerk

Elections Division

Voter Registration Inquiry

this should be sent if questioning voter registration as authorized under ORS 247.195

Date

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:

Mailing Address:

Political Party:

By marking this circle and signing below, I certify that my name, address, and political party shown are correct.

signature

date

Office of Any County Clerk

Elections Division

Notice of Hearing to Determine Voter Eligibility Per ORS 247.195(2)

this should be sent if questioning voter registration as authorized by ORS 247.195(1)

Date

Dear,

On (date), the (County name) County Elections Office mailed you a letter inquiring into the validity of your registration. Because we have not received an adequate response 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 _____ a.m./p.m.

The location of this hearing will be: _____

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

Sincerely,

County Elections Official

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**

Samples of Return Identification Envelope Oaths

Voters Statement #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;
- I voted my ballot and did not unnecessarily show it to anyone;
- This is the only ballot I have voted this election; and
- I still live at the address printed below.

Voters Statement #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;
- I voted my ballot and did not unnecessarily show it to anyone;
- This is the only ballot I have voted this election; and
- I still live where I am registered to vote.

Voters Statement #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.