

Best Practice Guide

Designing Manuals for Poll Workers

**Guidelines for creating usable
poll worker manuals.**



**Center for
Civic Design**

Introduction

Poll workers are on the frontlines of democracy. You can support them by writing and designing manuals that make it easy to find information, even in stressful situations. These guidelines are for anyone writing or updating their jurisdiction's election worker manuals.

Why follow these guidelines?

Poorly designed manuals lead to confusion on election day and more calls to your office. Great manuals answer questions and empower poll workers to feel confident while doing their jobs.

How do we get poll workers to actually use the manual?

- Make it easy to use with the tips in this best practice guide
- Practice using the manual in training
- Work in pairs with one person reading the instructions aloud, and a second person completing the task

What's the best program to create manuals in?

There's no single answer. Whether you use Microsoft Word, Adobe InDesign, Canva, or another tool to build your manuals, the design principles shared in this guide will help you create a manual that is easier to use.

We built a template in Word and included lots of tips and tricks for using Word in this guide because it's widely available, easy to use, and has a number of advanced formatting and accessibility features that—if used right—can take your document from good to great.

Related resources

Check out the accompanying template and how to guide on electiontools.org.

Look out for blue information boxes

Throughout the guide we include links to detailed instructions for some of Word's more advanced features. All of the URLs are written out in full in the appendix on Page 53.



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Make it easy to find the right information

How often have you experienced this: An election worker calls you on election day with a question that you know is covered in the manual.

The manual contains a lot of information, but finding it can be a challenge. Before you start writing your content, create an outline of everything you want to cover. A clear path for organization will help you create a succinct guide that can later turn into your table of contents. We recommend organizing your information into sections and subsections.

Sections

Sections are like chapters. They are probably organized by either time (opening, during voting hours, closing) or function (check in, voting booths, provisional voting, etc).

Subsections

Subsections are discrete tasks or duties and their accompanying instructions.

This section covers style and formatting options that improve navigation. We'll show you how to set up the skeleton of your document in a way that makes it easy to find the correct information.

When in doubt, remember to design pages for use in the polling place. Make sure they are easy to scan and read quickly, and make clear where one step ends and the next begins.

Use formatting to establish a clear information hierarchy

Font, color, and size help readers find, understand, and use content, and instantly know what's most important.

Most design and word processing programs let you define your styles. If you can't, then we strongly suggest you use a different program.

Styles don't just look nice, they are also a key way to help your readers navigate your document.

By using styles throughout your document, you teach your readers what to expect when they see different font sizes or colors. This color means we've reached a new main section. This font size means we've reached a new subsection. These distinctions are subtle, but important.

Styles also help both you (the document editor) and readers who use screen reader assistive technology navigate the document digitally. You can automate your table of contents to pull all of your headings into a single, hyperlinked list.

Styles and how to use them:

Style	What it's for	Formatting suggestions
Header 1 (H1)	Use for the title of a new section	<ul style="list-style-type: none"> Font size: 22 pt Suggested color: hex#5682B8
Header 2 (H2)	Use for the title of a subsection	<ul style="list-style-type: none"> Font size: 16 pt Suggested color: hex # 5682B8
Header 3 (H3)	Use for distinct topics or tasks within a subsection	<ul style="list-style-type: none"> Font size: 12 pt bold Color: black
Body Text	Use for writing paragraphs Build new styles based on this for bullets, numbered lists, and other formatted body text	<ul style="list-style-type: none"> Font size: 12 pt Color: black



Read more about [creating and customizing styles on Microsoft](#)

Example page using styles

Here's what they look like on a page.

Section 1 | Heading 2

Heading 2
1-2 sentences directly under the header to explain the main goal of the page.
What's the 1 thing someone needs to know?

Heading 3
Block of text.

Here's a list of steps you need to complete in order:

1. First
2. Second
3. Third

Heading 3
Here's a bunch of text.
And here's a bulleted list

- Item 1
- Item 2
- Item 3
- Item 4
- Item 5
- Item 6

Important dates to remember

Election	Early Voting	Election Day
Primary Election	5/28 to 6/10	6/14
General Election	10/22 to 11/4	11/8

Use this style to reference a document or law

8

H2 starts on a new page.

Several H3s on the page.

“Subtitle” is larger than the main body text.

Steps that need to be followed in order are a single, numbered list.

2 columns are used to format long lists.

Italics used for information that can fall back visually – interesting but not critical.

Start your manual with a table of contents

Table of contents (TOC) allow for easy navigation to important information.

Your TOC is a snapshot of your entire manual. It introduces readers to your main organizational structure, and should be the first place they turn to when they have questions.

Use font size, bold, and indents to show hierarchy and make the TOC easier to skim.

By using styles, you can create a TOC that updates automatically.

Main sections (H1) are bold and to the far left.

Subsections (H2) are slightly indented.

Include page numbers.

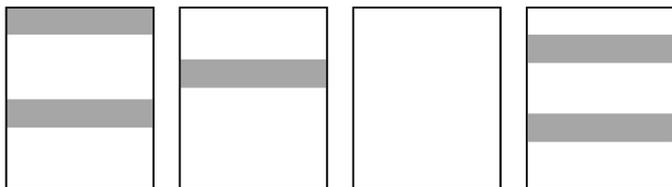
May go onto a 2nd page.

Table of contents County	
Table of contents	
Update the table before you finalize the document	
Table of Contents	
.....	1
County Board of Elections	2
Contact Information	2
County	2
Table of contents	3
How to use this manual	4
Find the right section	4
Look for these symbols	4
Welcome	5
Section 1	6
Numbered steps	8
Checklist	13
Visual guides	17
Form examples	20
Optional pages	25

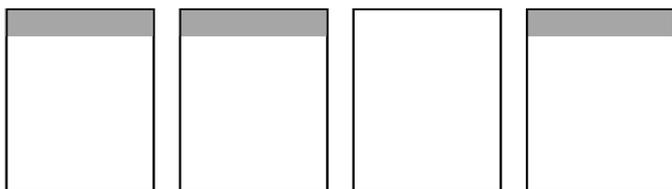
i Read these instructions on setting up a table of contents in Word

Start each new idea on a new page

Train readers to look in the same place every page to find information.



New ideas appear in different places on each page. Readers need to scan the entire page every time. They are likely to miss something.



New ideas are only at the top of a new page. Readers can skim the manual quicker because their eyes are trained to look in one place.

What counts as a new idea?

The answer will depend on how you organize your manual. But the short answer is that all Heading 1s and Heading 2s are probably new ideas.

This change might increase your page count, but we think it's worth it. Other tips in this guide will help you write more concise instructions.

Improve reading comprehension speed with left aligned text

Align text and objects to the left in a predictable vertical line.

Don't use center aligned text. With center aligned text, the beginning of each line is in a different place than the line before it. This slows down reading time, as people need to search for the beginning of the line.

STATION 2 (VERIFICATION JUDGES) 

- Two Verification Judges, one from each political party, locate the voter's signature verification record. The verification record is an electronic poll book, a scanned signature roster or a pre-printed Application to Vote with the scanned signature of the voter.
- The two Verification Judges compare the voter's signature and address on the ballot application to the signature and address on the verification record. Both the signature and address must be the same.
- If an electronic poll book or a preprinted application is used, mark as follows:
General and Consolidated Primary:
"D" (Democrat), "R" (Republican) or "V" (Nonpartisan) OR
General and Consolidated General Election:
"V" (voted)
- Determine the correct ballot style. Unless preprinted on the application, write the ballot style number in the appropriate space on the voter's application as directed by the Election Authority. Initial the application and return it to the voter, or pass to the Ballot Distribution Judge.
- At 6:30 p.m. one of the Election Judges announces the polls will close in one half hour.
- At 7:00 p.m. an Election Judge will announce the polls are closed. Any voter standing in line at the closing time is entitled to vote. Election Judges shall mark the last person in line at closing. This can be accomplished in any manner you choose or as directed by your Election Authority. If you have sufficient judges you can have a judge stand at the end of the line behind the last person entitled to vote.

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This example of a poll worker manual page has lines that start in different places on the page. It forces the eye to move back and forth, increasing the chance that the user will miss an important section. The same thing happens when text blocks or images in your manual are in different places on the page.

During Voting Hours | Having a Voter Sign the Signature Sheet Pollbook

Having a Voter Sign the Signature Sheet Pollbook

At Station 2, the voter is going to sign the signature sheet. Follow these steps.

- Two of you, one from each political party will need to complete these steps.
- Flip through the sheets until you find the voter.
- Have the voter sign in the center column of the signature sheet.
- Compare that signature to the preprinted signature in the left hand column.
- After comparing, both of you need to initial to the right of the voters signature.
- You can check the voter's ballot style in far left hand column.
- Make a checkmark in the 'Voted' box in the right hand column.
 - If it is a Primary Election, instead of the 'Voted' box, there will be boxes for each party. Check the box next to the party ballot the voter requested.

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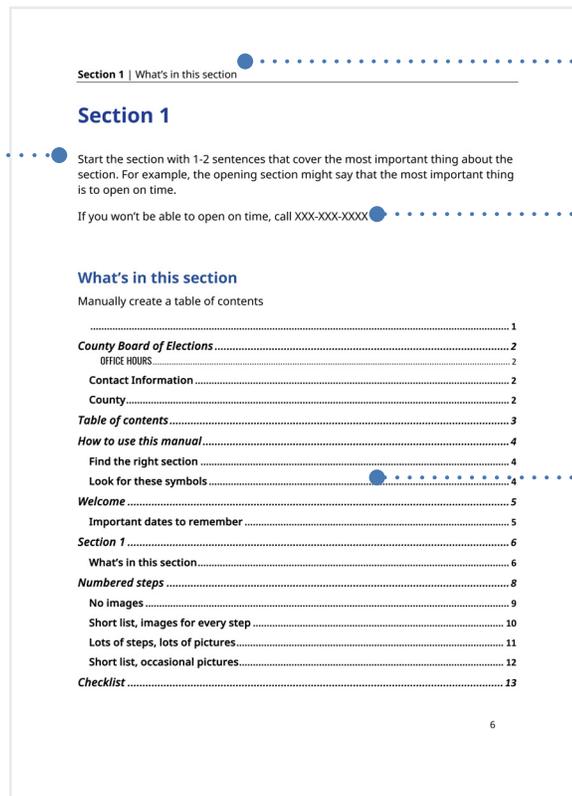
A revised version of the page above has all of the same information starting in the same vertical line. When the user completes one section, they go straight down to the next line and start in the same place as before. Using a vertical, left-alignment in your manual has the same benefit.

Break up a long manual into manageable chunks with section breaks

Start each new section with a new page.

The dedicated section break page should highlight important information and show what is in the section with a secondary TOC. If your manual is short, or you have different manuals for different tasks, you may not need this page.

Start by saying the single most important thing to know in this section.



Running header updates to include section title.

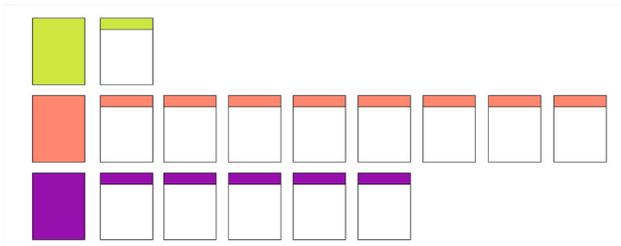
Say where to go for help if needed.

Table of contents just for this section.

i Watch this [youtube video](#) about creating multiple table of contents in a Word doc.

Use color and scale to add visual cues that help your reader skim

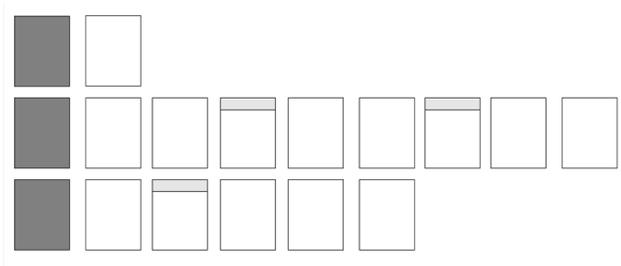
Imagine laying every page of your manual out on the floor. How easy is it to tell when a new section begins?



Color

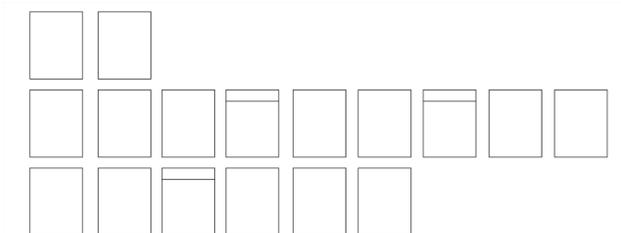
- Each section has a dedicated color
- Section break pages are visually arresting

If you're printing in black and white, you can still do this.



Black and white

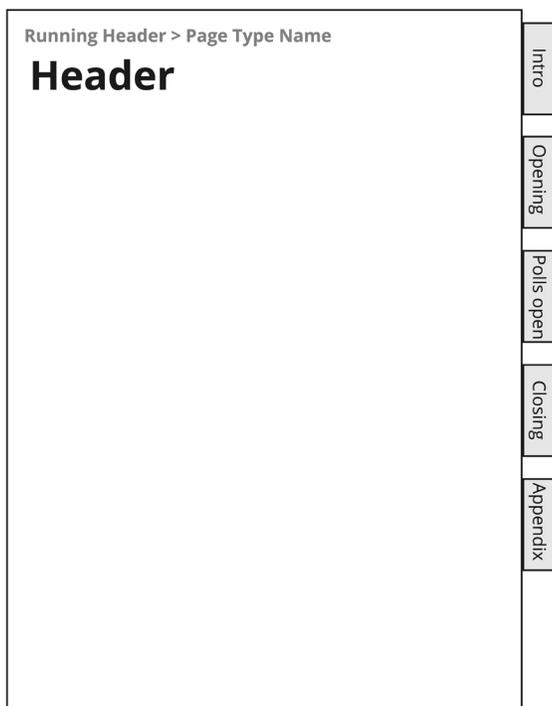
- Section break pages are easy to find
- Subsections stand out



Not Recommended

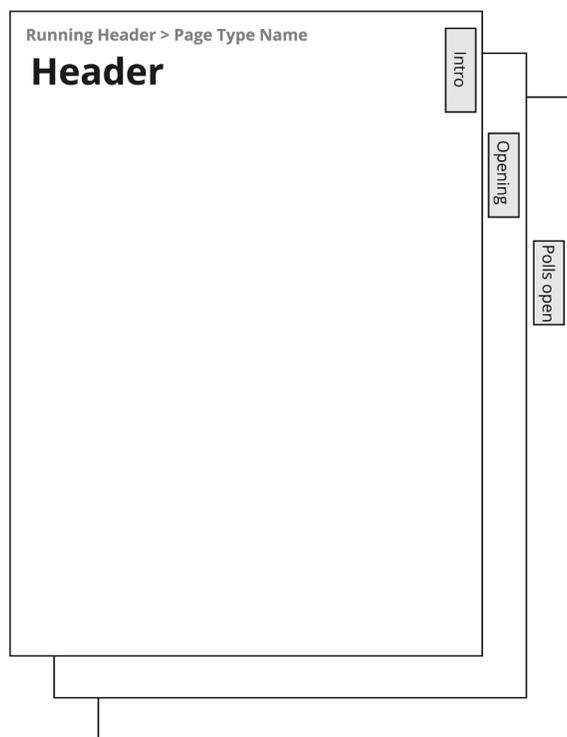
The all white version is nearly impossible to skim and quickly identify section shifts.

Use outer edges of the paper to help people find where sections start



External tabs

Whether you're using your local copy shop, or a more professional printer, ask for a price quote for tabs. You can also buy these from an office supplies store insert them yourself.



Internal tabs (Thumb index)

If it isn't cost-effective to get external tabs, you can add them yourself to the outside edge of a page. Even when they are printed on the edge of the page, they can help as someone flips through the pages rapidly.

Use headers and footers for orientation on each page

If the page was ripped out of the manual, the header and footer should help someone put it back in the right place.

First part of header is the section title (from an earlier page).

Second half of header is the subsection.

Section 1 | What's in this section

Heading 2

1-2 sentences directly under the header to explain the main goal of the page. What's the 1 thing someone needs to know?

Heading 3
Block of text

Dynamic header instantly tells the reader what is on the page.

General Election 10/22 to 11/4 11/8

Use this style to reference a document or a law

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Page number in the bottom outside corner.

Use the right typography to call attention to important details on a page

Bold

Use bold to emphasize information and draw the reader's attention

- Readers are often sensitive to the weight of a type, which makes bold an effective stylistic choice to call attention to important information
- But be careful, too much emphasis can be worse than none, so save bold for important words, phrases, and dates

Italics

Use italics for parenthetical information, like citations of laws

- Low vision readers have a harder time reading italics because of the way letters connect, which makes italics a poor choice for calling attention to information
- Italics are often used within the body of a text to emphasize a word or phrase
- Italics do not work well for long paragraphs of text

ALL CAPS

Don't use all caps

- Most of what we read in English is mixed case, with both Capital and lowercase letters
- All caps takes away the variation that we're used to, which slows down reading and comprehension speeds

Underlining

Only use underlines for hyperlinks in digital documents

- Underlining can make text harder to read by running over descenders (like j, p, and y) which adds extra noise to the page

Use shorter line lengths to increase reading comprehension

Shorter lines are more comfortable to read than longer lines.

When a line of text stretches across an entire printed page, your eyes have to do more work. It's harder to track your progress vertically and find the start of the next line of text.

Aim for an average line length of 45–90 characters, including spaces.

Ways to shorten line lengths:

- Use bullet and indentation
- With bullets, write short sentences—or don't write full sentences at all. Short, direct, verb-driven phrases are clearer, especially when it comes to instructions.
- Adjust the margins
- Place images in a column taking $\frac{1}{4}$ - $\frac{1}{5}$ of the page

Other benefits to more space in the margins:

- You can insert tips or other important notes (e.g. the blue boxes in this guide).
- Poll workers can write in important information—both during training, and while they are working.

Writing great instructions

Something important to keep in mind when writing your manual is that no one reads a manual for fun. Its purpose is to give directions.

Most of this comes down to plain language. For a more in depth explanation of plain language you can read about our research on our [website](#).

For even more information about writing effective poll worker materials, read our [Field Guide](#) on the subject.

Give your poll workers goals to work towards

At the beginning of each section, give poll workers a clear north star.

What's the one sentence or phrase you want them to remember or fall back on when they're in a stressful situation?

During opening, it might be: have enough equipment set up to open at 7 am, call us if you can't.

This helps supervisors make decisions about allocating poll worker time. If opening is only minutes away, then instead of setting up all the booths or the ballot scanner, they'll know they need one booth and one ballot scanner, and then can set up the rest of the booths as soon as they have time.

Write directly to your reader, and only write to one reader at a time

Use “you” when writing to your poll workers.

In a sentence that speaks directly to your users, the subject is the pronoun “you” either stated (You remove the seal) or implied use imperative statements (Remove the seal).

Before

Poll workers should make sure the unit is on. The ballot box should be unlocked and opened. Poll workers should then make sure the power cord is plugged into the back of the unit.

After

1. Make sure the unit is on.
2. Unlock and open the ballot box.
3. Make sure the power cord is plugged into the back of the unit.

Address one group of readers at a time.

Documents that attempt to serve multiple audiences are difficult for almost everyone.

Focus on what poll workers need to know to do their job. Don't include extraneous information, like what happens at the warehouse after they drop off their supplies.

If different poll workers have very different jobs, consider creating separate manuals or job aids for each role.

Write headings that describe tasks, not equipment

Effective headings tell readers what they will learn when they read what's underneath.

This is especially important for subsections (H2s).

A heading that names an object leads to questions, instead of answering them. For example, a heading like "Ballot marking device" leads to questions including: Is this about setting up a ballot marking device, or fixing a problem with a ballot marking device or turning it off at the end of the night, or.... something else?

This forces the reader to spend more time on each page deciding whether or not it's going to be useful for them.

We love starting headings in manuals with verbs, but you could also use questions. Whatever you decide, stick to it throughout your manual.

One way to check if your headings are effective, is to look at the table of contents. It should read like a set of high level instructions.

Before	After
Loading a ballot	Loading a ballot
Poll worker ballot and precinct selection screens	Selecting a precinct
Coding a ballot	Selecting a ballot
	Marking a ballot to review for voter eligibility

Put steps in the order they need to be completed

Use numbers for steps.

Use bullets for lists that are not step-by-step procedures.

If poll workers need to complete a series of tasks in a strict order, use numbers.

For example:

1. Insert the Supervisor card.
2. Enter the password.
3. Remove the Supervisor card.

If the order doesn't matter, then bullet points or a checklist will work.

For example:

Put these items into the blue bag:

- Pens
- I voted stickers
- Tape

Break long procedures into a series of actions (substeps)

Use indents for substeps to create visual hierarchy.

Steps can act almost like accordions—if you know what to do, or if the step doesn't apply, you can just skip down to the next thing.

The substeps are the details that a less experienced poll worker might need. Or they are details about one option—if that option isn't relevant, then your reader should be able to quickly skip past them.

Before	After
If an overvoted ballot is encountered, the voter should be provided with an alternate ballot, and instructed to mark the ballot without incurring an overvote, then return the ballot for processing. The overvoted ballot should be filed as spoiled. If the voter does not want to mark another ballot, and is content with the candidate selections on the original ballot, the overvoted ballot should be fed into the unit in override mode.	<ol style="list-style-type: none">1. Explain overvoting to the voter.2. Ask if the voter wants to mark a new ballot or turn in the overvoted ballot.3. If the voter wants to mark a new ballot:4. Give the voter a new ballot.5. File the overvoted ballot as spoiled.6. If the voter does not want to mark a new ballot:7. Ask the voter to put the overvoted ballot into the unit.8. Press the override button.

Put warnings before—not after—consequences

Be sure instructions can be followed in order, putting warnings or preparation needed before the action.

Consider what you want the election worker to read—and do—first. If the warning is at the end, there is a very real chance that the election worker will take action first, and may not read the warning until it's too late.

Before

Tape poster to the front of the entrance door. Skip this step if it's raining.

After

If it's raining, don't do this step.
Tape poster to the front of the entrance door.

Before

The Lithium-Ion Battery Pack can be replaced only by Authorized Service Personnel.
CAUTION: RISK OF EXPLOSION. THE BATTERY CAN EXPLODE IF REPLACED BY INCORRECT TYPE.

After

Caution! Risk of explosion!
The battery can explode if it is replaced by an incorrect type. The Lithium-Ion Battery Pack can be replaced only by Authorized Service Personnel.

Using images to support understanding

An image can make or break directions in a manual. Too many and they become too small to comprehend on paper. Too blurry, and the reader is confused by what they are looking at. A good image supports the point you are trying to get across. They are simple, clear, and easy to digest.

Images should support, not supplement, written or verbal information. No information should be inaccessible to any voter because of its format.

Use illustrations when possible instead of photos

Good images are less cluttered, and allow you to show the most important information, often in a smaller amount of space.

System vendors often have illustrations needed in their own manuals. Use them, or create your own.

For example, both images below accompany these instructions:

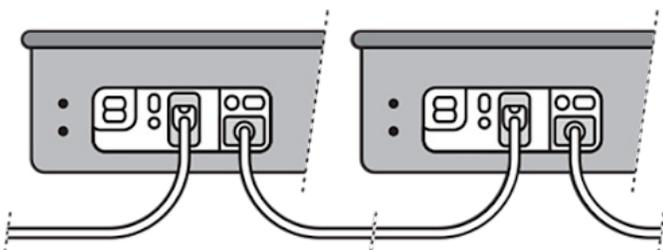
- Connect the unit to the power receptacle (AC in) of the previous unit.
- This creates a daisy-chain of the voting units.

Both images are attempting to convey the same information. But, the illustration is able to do it clearer, with a smaller footprint.



The Photo:

- Takes up a lot of space
- The voting units are far from each other
- You can't see the cords clearly
- The cord hangs below the edge of the photo



The illustration:

- Takes up less vertical space on the page
- Zooms in on the power receptacles

Take great photos when you do use them

Whether you use a photo or an illustration, the same key principles apply.

- Use a high quality version. Images should not be blurry.
- Use images that are large enough to see clearly.
- Make sure that key information or details in the image are visible
- If you want to show an entire object or form and then zoom in on key details, use two different photos so detail isn't lost.

Other things to consider when taking photos:

Use a plain background.

If there are lots of items or things around, move them when you take the photo. Or crop the image so that they don't distract the reader.

Use good lighting to prevent shadows.

Sunlight from a window will work most of the time. Stand with your back to a window so the light falls onto the object. Avoid using spotlights that cast heavy shadows.

Use a screenshot on a computer instead of taking a photo of a computer screen.

Photos of screens often look fuzzy. If you do need to take a photo, position lights so that they don't cause a glare on the screen.

Take multiple photos so you have options.

Take both landscape and portrait photos, and take them from a few angles. This gives you more options when you place the photos onto a page, or when you want to point out different details.

Use images strategically—you don't need an image with every step

Use images to support your text, not to replace it.

Images take work to maintain. They can be easily misinterpreted by different viewers. And a low quality image can cause disagreements.

Start by writing plain language instructions. Then add in images for additional context.

Include an image when you want to:

- Show the correct version of an object for a scenario.
- Show an important technical detail.
- Diagram an important procedure.

An image might be unnecessary if:

- You only have a low quality image.
- There is already a similar image on the page.
- The image is text on a screen.

Use icons to call out important information and warnings

Use a small, consistent set of icons throughout the manual.

Introduce them in the first few pages of the manual.

Putting the list on one of the first pages means they will be easy to find again.

Don't rely solely on color.

Each icon should also have a distinct image or shape. This combination ensures that people who are colorblind can still use the icons.

Limit how many icons you use.

Too many and readers won't remember what each icon means.

-  General information call out
-  Warning (but not an emergency) (e.g. call the warehouse when you have time)
-  Stop! Immediate action required

Generic set

-  Refer to material on another page of the manual.
-  An item requires the Deputy or Judge's signature.
-  Call the Call Center.
-  Say something to a voter.
-  This is a quote from the Texas Election Code.
-  This is a very important note.

Travis County, TX

 Download icons from our [Image Library on ElectionTools.org](https://www.electiontools.org)

Place images neatly on the page

When you add an image to a page, it has to fit without looking cluttered.

A well-designed page means your images are:

- Aligned to the text properly
- Anchored
- the correct size

These are all functions of text wrapping, or changing the visual relationship between images and text.

Align

You want your images to line up with the correct information. In this example from the template, it is clear that the first image accompanies the first step and the second image accompanies the second image.

Anchor

Anchoring connects an image to the text, so if the text moves, the image moves with it. Anchoring also enables screen readers to connect the correct graphic to the text. It is part of the text wrapping and moving graphics system in Word.

Size

Images look different on paper than they do on a screen. Print pages and look at the images on paper to make sure they are large enough to see clearly. We recommend keeping images 1.75 inches wide or larger.

i For more detailed directions about text wrapping in Word, read this [article](#) from Microsoft.

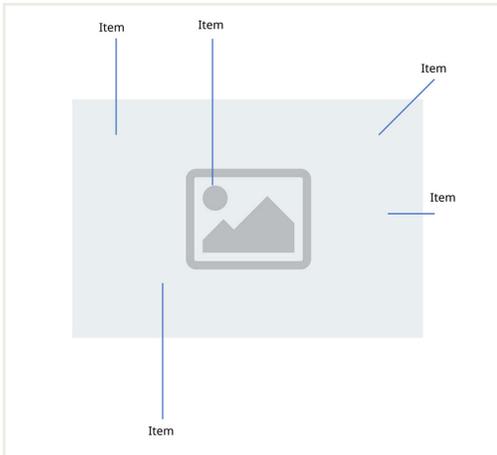
top of the picture. Align the pictures to the left.



1. To change the picture, right click or control click on the image and select "change picture" from the menu"
2. Instructions take up a whole line of the page
 - o Sub steps may need to be manually formatted
 - o And another sub step

Use callouts to point out important parts of an image

Callouts are a visual element that helps emphasize something specific on an image.

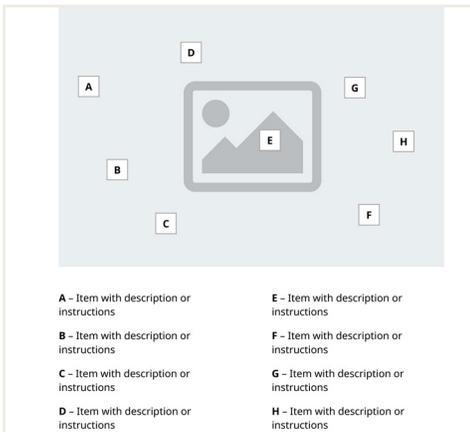


Leader lines

A leader line is a line that connects a bit of text to a portion of the image. They are great for giving a 1 or 2 word name of an object or feature.

The line will go on top of the image, but it shouldn't block the image. To prevent the line from obscuring the image, make the line thin in a neutral color. In this document, we used a blue dashed line.●

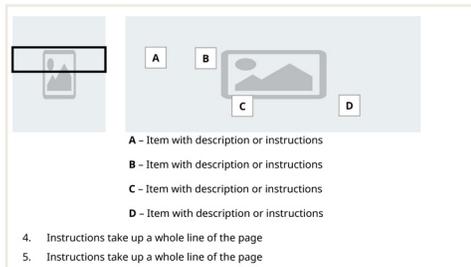
To keep your page from looking busy, use straight lines at a 180, 90, or 45 degree angle.



Legend

When you want to give longer explanations for features in an image, using a legend gives you more space than leader lines.

Label items in the image with letters (they should be on a solid color background to help them stand out from the image). Then underneath the image, write out what each letter is. You can use numbers if the order that someone reads the items or uses the features matters, such as a map showing how voters will move through the polling place.



Zoom in

When you want to zoom in or magnify a particular feature or portion of a form or screen, show the full form or equipment—large enough to be recognizable, but too small to see in detail. Use a box outline to point out what you want to focus on. Then include a second, zoomed in picture of just the portion of the object that you want to talk about. Include leader lines or a legend if needed.

Use diagrams for complex multi-step workflows and processes

Diagrams are a great way to convey complex multi-step workflows and processes with multiple inputs or outputs.

i For detailed flowchart creation instructions, read this [article](#) from Microsoft

Color/Styling

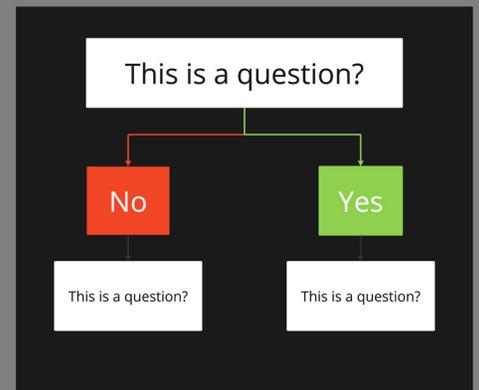
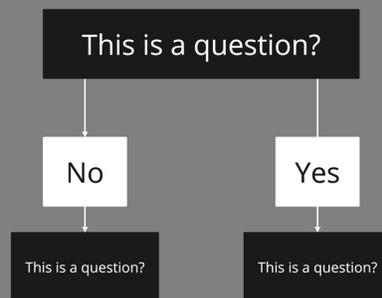
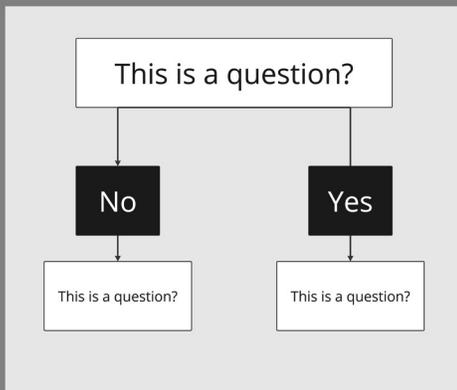
You need to assign a consistent and distinct style and color to:

- the questions
- the yes answer + arrow
- the no answer + arrow

Which of those elements do you want people to read first? What should jump out at the “front” of the image? You’ll need to play around with color until you figure out the appropriate arrangement, even if you’re just doing black and white.

Spacing

There’s a lot of information to fit into a small space. Arrows show the flow, but you also want to stick with a consistent top-to-bottom or left-to-right reading order if possible. Keeping elements aligned to a grid layout will keep it from feeling overwhelming.



Make images accessible using alt text

Writing alt text for images is an essential step to make sure the manual is accessible.

Alt text helps:

- People who use screen readers.
- When images are missing or turned off.
- If you decide to translate your manual to other languages besides English.

If you plan on sharing a digital version of your manual, then all of your images need alt text since all images in your manual should support meaning and not be purely decorative.

When writing alt text, ask:

- What does the image add to the page?
- What would someone only know by looking at the image?

i [Read more](#) about writing great alt text

What you write as alt text depends on the image.

If the image contains:

- Text - repeat the words
- Visual information - explain it
- Sensory information - describe it
- Nothing new - ignore it (mark it as descriptive)

Alt text should be different from the caption. After all, a reader doesn't need to read (or hear) the same sentence twice.

i [Use this decision tree](#) to decide what to write in the alt text



Alt text:

A diagram sketched on a chalkboard as a triangle. Top: Attitude. Right: Behavior. Left: Comprehension.

Caption:

Fig 1: The ABC of research methods

Index of page types

To help you design pages to be used in a polling place, we've laid out all of the example page types we made. Each example has tips on how to create the page.

When creating your own manual, you may run into the goldilocks problem—what is the line between a manual that is long enough to be complete and short enough to not be intimidating? There's no single right answer. Maybe the right answer for you is publishing multiple volumes. Maybe it's one really long volume bound in a binder. If it helps, we've seen a number of good manuals in the 100+ page realm.

Some of the recommendations in here will increase the page count. That is because we're big believers in white space and starting new topics on new pages. Our research shows that white space and 1 page per topic help people retain information. But, if your budget or time limits the number of pages you can publish, our tips and templates will help you make the best design decisions to have a lot of content on one page.

How to use these page types:

- Use these as inspiration and recreate them in your own document
- Download the word files and input your content into a new document

Introductory pages

The first few pages of your manual set the tone and tell your poll workers what to expect.

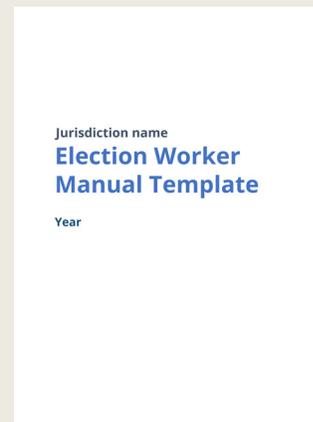
Use these pages to:

- Establish a brand identity through colors and fonts
- Tell poll workers where to get help
- Introduce icons and other wayfinding devices that will be used throughout the manual
- Welcome poll workers and let them know their work is valued

These pages include:

- Cover page
- Contact info
- How to use this manual
- Welcome letter

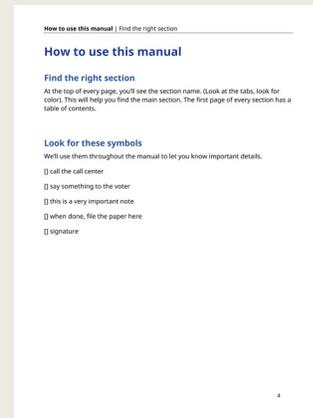
Cover page



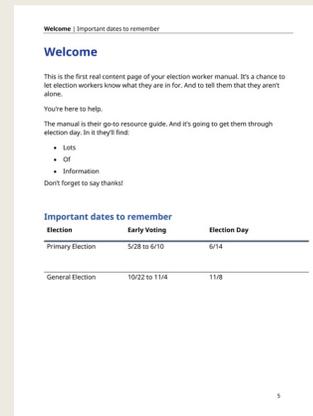
Contact info



How to use the manual

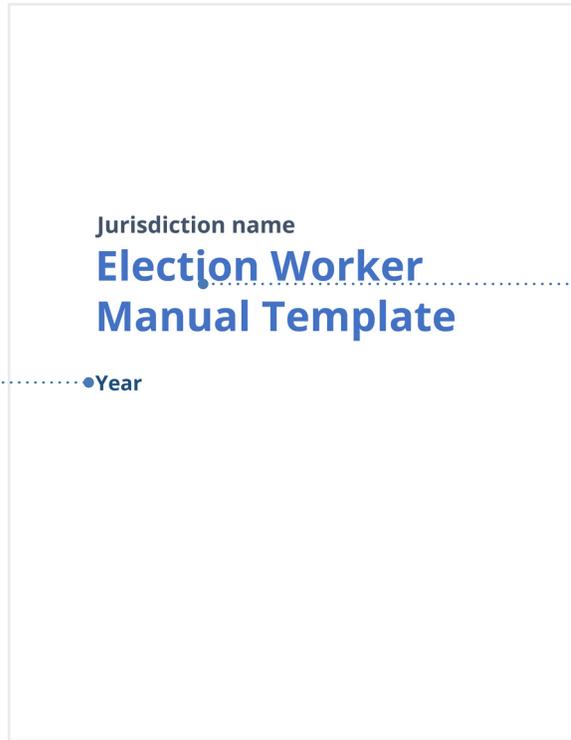


Welcome letter



Cover

Tells who the manual is for, what is inside, and when and where to use it.



The title is in sentence case.

The year or election is prominently featured so that readers are confident they have up-to-date info.

Contact page

Make it easy for poll workers to find more information when needed.

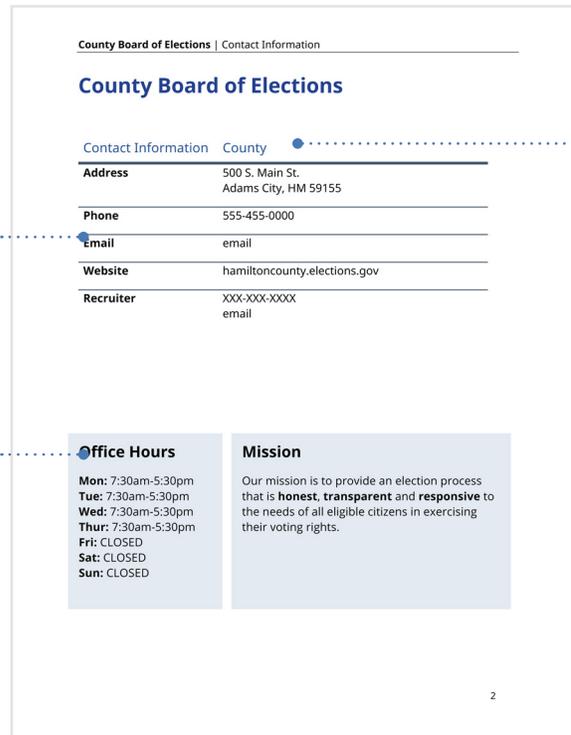


Table includes a header row so that the content in the table can be read accurately by a screen reader.

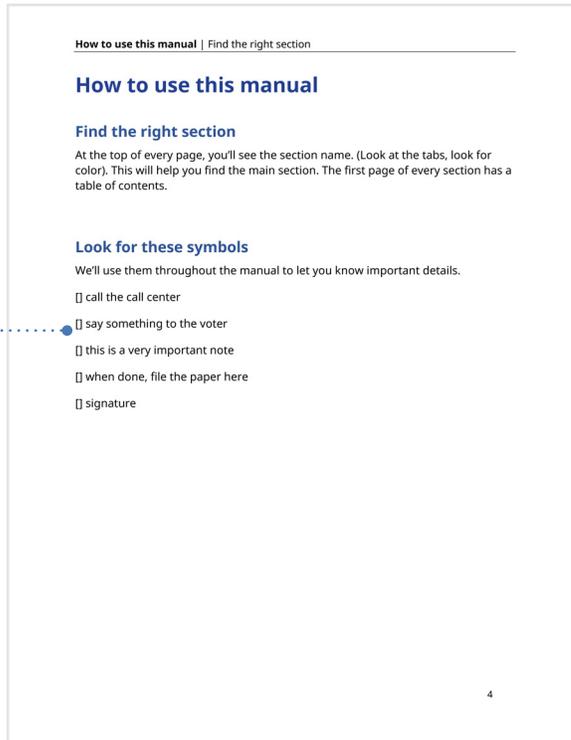
Consider using generic email and phone info (e.g. elections@co.gov).

Including office hours sets expectations about response times.

How to use the manual

Introduce icons that will be used accross the manual

Introduces a limited number of distinct icons.

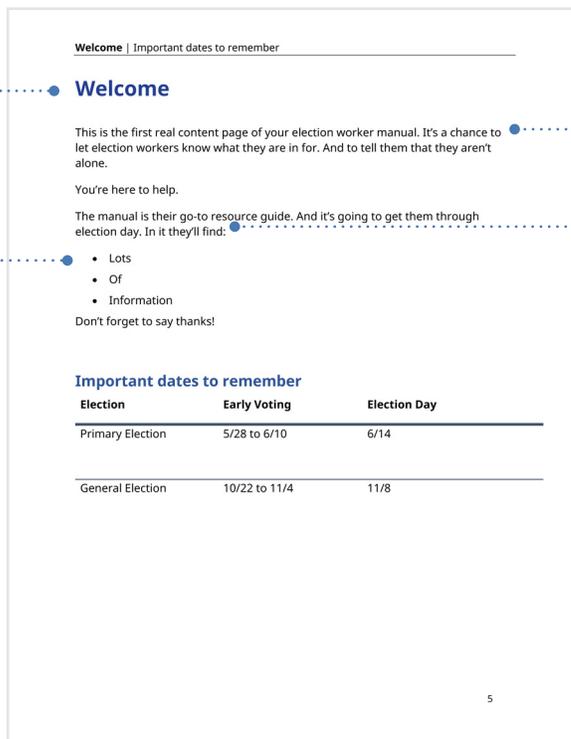


Welcome letter

Text heavy page written in a friendly tone

Write a friendly title.

Use bulleted lists to break up long sentences.



Short paragraphs between 1-3 lines.

Write in a friendly, approachable tone.

Table of contents

A table of contents is critical if you want poll workers to be able to find accurate information quickly.

There are two key components of a table of contents:

- **Informative headings** that contain the right key words to signal what will be in the section
- **Page numbers** so that your reader knows where to go

Luckily, you can automate your table of contents which makes it easier to maintain.

These pages include:

- Table of contents
- Section break

Table of contents County	
Table of contents	
Update the table before you finalize the document	
Table of Contents	
County Board of Elections	1
Contact Information	2
County	2
Table of contents	3
How to use this manual	4
Find the right section	4
Look for these symbols	4
Welcome	5
Section 1	6
Numbered steps	8
Checklist	13
Visual guides	17
Form examples	20
Optional pages	25

Table of contents

Section 1 What's in this section	
Section 1	
Start the section with 1-2 sentences that cover the most important thing about the section. For example, the opening section might say that the most important thing is to open on time. If you won't be able to open on time, call XXX-XXX-XXXX	
What's in this section	
Manually create a table of contents	1
County Board of Elections	2
OFFICE HOURS	2
Contact Information	2
County	2
Table of contents	3
How to use this manual	4
Find the right section	4
Look for these symbols	4
Welcome	5
Important dates to remember	5
Section 1	6
What's in this section	6
Numbered steps	8
No images	9
Short list, images for every step	10
Lots of steps, lots of pictures	11
Short list, occasional pictures	12
Checklist	13

Section break

Table of contents

Make it easy to navigate to the main sections

Use font size, bold, and intents to show hierarchy.

Table of contents | County

Table of contents

Update the table before you finalize the document

Table of Contents

-1
- County Board of Elections**2
- Contact Information2
- County2
- Table of contents**3
- How to use this manual**4
- Find the right section4
- Look for these symbols4
- Welcome**5
- Section 1**6
- Numbered steps**8
- Checklist**13
- Visual guides**17
- Form examples**20
- Optional pages**25

3

Likely goes onto a 2nd page.

i Read these instructions on setting up a table of contents

Section break

Start a new major section of the manual with it's own intro page

Start by saying the single most important thing to know in this section.

Section 1 | What's in this section

Section 1

Start the section with 1-2 sentences that cover the most important thing about the section. For example, the opening section might say that the most important thing is to open on time.

If you won't be able to open on time, call XXX-XXX-XXXX

What's in this section

Manually create a table of contents

-1
- County Board of Elections**2
- OFFICE HOURS2
- Contact Information2
- County2
- Table of contents**3
- How to use this manual**4
- Find the right section4
- Look for these symbols4
- Welcome**5
- Important dates to remember5
- Section 1**6
- What's in this section6
- Numbered steps**8
- No images9
- Short list, images for every step10
- Lots of steps, lots of pictures11
- Short list, occasional pictures12
- Checklist**13

6

Running header updates to include section title.

Say where to go for help if needed.

Table of contents just for this section

If the H2s in the section are written as tasks, this double as a checklist.

Numbered steps

Numbered steps will probably be the most common page type in your manual.

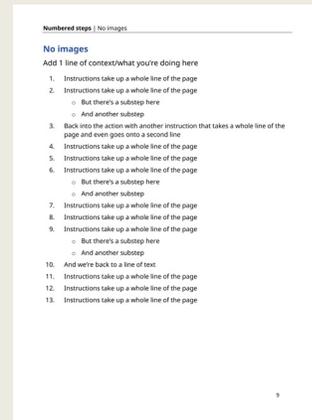
These pages need to be usable in stressful, time-constrained situations. Formatting can make the page easy to skim, and help poll workers keep track of where they are in the process.

Use this page type for:

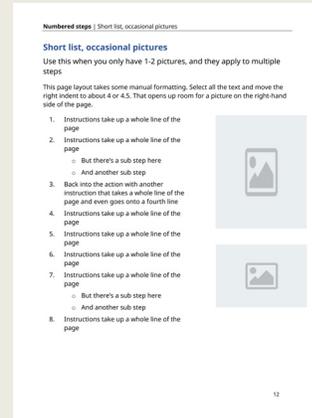
- Setting up equipment
- Closing down equipment
- Checking in a voter
- and any other place where you need poll workers to complete a process in a strict order

These pages include:

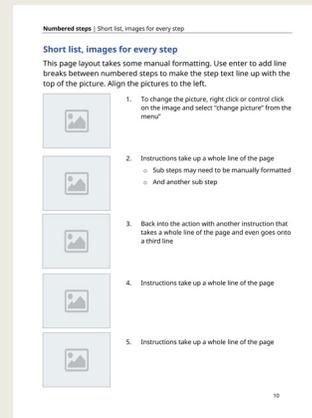
- Text only
- Few images
- Images critical to most steps
- Many images with little text



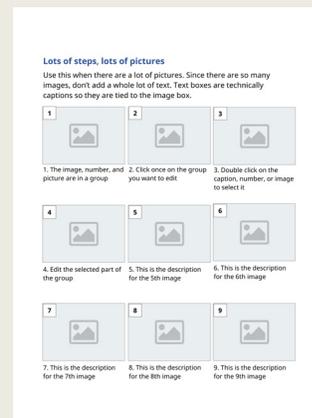
Text only



Few images



Images critical to most steps



Many images, minimal text

Numbered steps

Use when steps need to be completed in a particular order

Single sentence explains the end goal, or how to know when the task is complete.

Numbers are vertically aligned.

Numbered steps | No images

Add 1 line of context/what you're doing here

1. Instructions take up a whole line of the page
2. Instructions take up a whole line of the page
 - o But there's a substep here
 - o And another substep
3. Back into the action with another instruction that takes a whole line of the page and even goes onto a second line
4. Instructions take up a whole line of the page
5. Instructions take up a whole line of the page
6. Instructions take up a whole line of the page
 - o But there's a substep here
 - o And another substep
7. Instructions take up a whole line of the page
8. Instructions take up a whole line of the page
9. Instructions take up a whole line of the page
 - o But there's a substep here
 - o And another substep
10. And we're back to a line of text
11. Instructions take up a whole line of the page
12. Instructions take up a whole line of the page
13. Instructions take up a whole line of the page

9

Keep instructions brief and direct.

Line space between steps helps to keep each step distinct.

Substeps are indented.

Few images

Use when a few images can illustrate multiple steps accurately

Written text is two-thirds the width of the page.

Numbered steps | Short list, occasional pictures

Short list, occasional pictures

Use this when you only have 1-2 pictures, and they apply to multiple steps

This page layout takes some manual formatting. Select all the text and move the right indent to about 4 or 4.5. That opens up room for a picture on the right-hand side of the page.

1. Instructions take up a whole line of the page
2. Instructions take up a whole line of the page
 - o But there's a sub step here
 - o And another sub step
3. Back into the action with another instruction that takes a whole line of the page and even goes onto a fourth line
4. Instructions take up a whole line of the page
5. Instructions take up a whole line of the page
6. Instructions take up a whole line of the page
7. Instructions take up a whole line of the page
 - o But there's a sub step here
 - o And another sub step
8. Instructions take up a whole line of the page



12

Consider annotating the image with numbers to show each related step (e.g. when to fill out each form field).

Images for every step

Use when pictures and words work together to explain each step

Picture related to every step.

Use high quality pictures without unnecessary backgrounds.

Numbered steps | Short list, images for every step

Short list, images for every step

This page layout takes some manual formatting. Use enter to add line breaks between numbered steps to make the step text line up with the top of the picture. Align the pictures to the left.

1. To change the picture, right click or control click on the image and select "change picture" from the menu
2. Instructions take up a whole line of the page
 - o Sub steps may need to be manually formatted
 - o And another sub step
3. Back into the action with another instruction that takes a whole line of the page and even goes onto a third line
4. Instructions take up a whole line of the page
5. Instructions take up a whole line of the page

10

Numbers are vertically aligned.

This page type has room for longer written explanations.

Many images, minimal text

Use when you have a lot of steps to show

Pictures related to every step.

Minimal text, pictures do most of the work.

Lots of steps, lots of pictures

Use this when there are a lot of pictures. Since there are so many images, don't add a whole lot of text. Text boxes are technically captions so they are tied to the image box.

1. The image, number, and picture are in a group
2. Click once on the group you want to edit
3. Double click on the caption, number, or image to select it
4. Edit the selected part of the group
5. This is the description for the 5th image
6. This is the description for the 6th image
7. This is the description for the 7th image
8. This is the description for the 8th image
9. This is the description for the 9th image

Step numbers in the top left corner on a white background so it is easy to read.

Checklists

Checklists make great job aids. They are tactile, so encourage poll workers to write on the page and check items off as they complete them. If you reuse the manual in multiple election cycles, consider printing checklists separately as supplemental job aids.

A major difference between checklists and numbered steps is that items on a checklist can likely be completed in a different order than the order they are written in.

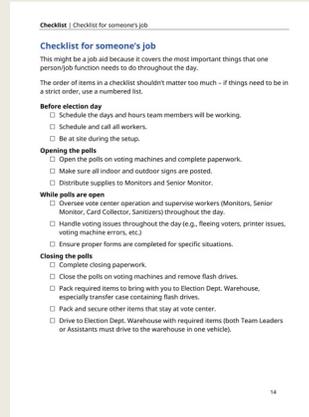
Use checklists when:

- the order that steps are done in doesn't matter
- packing and set up lists

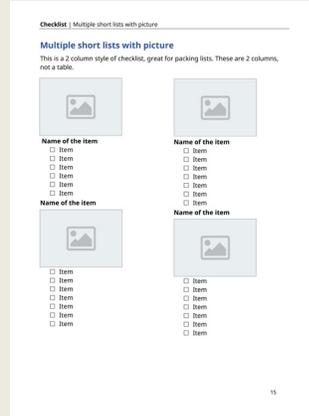
These pages include:

- Job tasks
- Packing lists

Job tasks



Packing lists



Job tasks

Items on the checklist can be completed in any order

Intro says when and where to use this checklist.

Checkbox style used in place of bullet points.

Checklist | Checklist for someone's job

Checklist for someone's job

This might be a job aid because it covers the most important things that one person/job function needs to do throughout the day.

The order of items in a checklist shouldn't matter too much – if things need to be in a strict order, use a numbered list.

Before election day

- Schedule the days and hours team members will be working.
- Schedule and call all workers.
- Be at site during the setup.

Opening the polls

- Open the polls on voting machines and complete paperwork.
- Make sure all indoor and outdoor signs are posted.
- Distribute supplies to Monitors and Senior Monitor.

While polls are open

- Oversee vote center operation and supervise workers (Monitors, Senior Monitor, Card Collector, Sanitizers) throughout the day.
- Handle voting issues throughout the day (e.g., fleeing voters, printer issues, voting machine errors, etc.)
- Ensure proper forms are completed for specific situations.

Closing the polls

- Complete closing paperwork.
- Close the polls on voting machines and remove flash drives.
- Pack required items to bring with you to Election Dept. Warehouse, especially transfer case containing flash drives.
- Pack and secure other items that stay at vote center.
- Drive to Election Dept. Warehouse with required items (both Team Leaders or Assistants must drive to the warehouse in one vehicle).

14

H3 divides tasks into shorter groupings, either by time of day, or type of work.

Short list with images

These short lists are great for packing or set up lists

2 column layout means that line lengths are short, and easier to read.

Checklist | Multiple short lists with picture

Multiple short lists with picture

This is a 2 column style of checklist, great for packing lists. These are 2 columns, not a table.

 <p>Name of the item</p> <ul style="list-style-type: none"><input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item	 <p>Name of the item</p> <ul style="list-style-type: none"><input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item
 <p>Name of the item</p> <ul style="list-style-type: none"><input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item	 <p>Name of the item</p> <ul style="list-style-type: none"><input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item<input type="checkbox"/> Item

15

Space for image on top of the list (this could be the the bag or envelope everything goes into).

Visual guides

Sometimes an image really is worth a thousand words.

There are a lot of materials and supplies that poll workers interact with. Trying to describe where they live and how to set them up can take many pages of text.

Instead, clean, simple to understand diagrams can cover the same information in a smaller footprint.

Use this page type when:

- Setting up a polling place
- Showing a table with supplies

These pages include:

- Image with legend
- Image with callouts



Image with legend

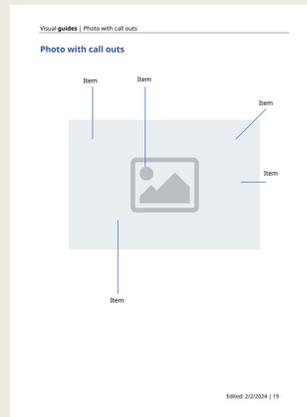


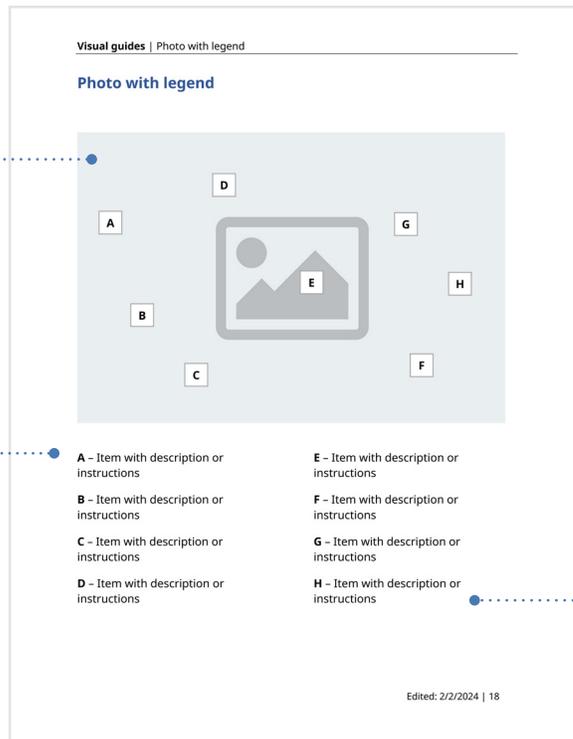
Image with callouts

Image with legend

Use a legend when you need to include short item descriptions

Letters have a white background to increase visibility against picture.

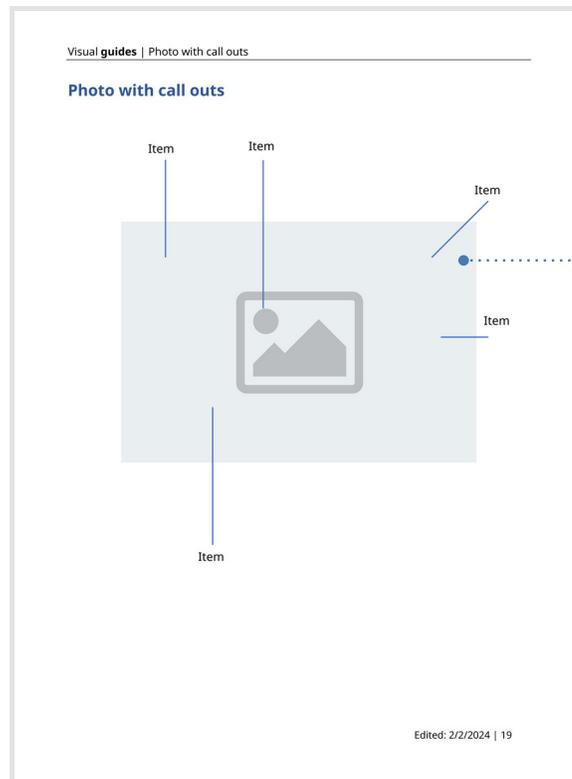
Keep item descriptions short.



2 column layout means that line lengths are short, and easier to read.

Image with callouts

Use callouts if you only need to name the item, without describing it



Leader lines are at 180, 90, or 45 degree angles only
This keeps the page looking neater.

Form examples

Forms are often loose papers that can be easily lost.

When a form is mentioned in the manual, you can help poll workers keep track of a form by saying:

- Where to find it
- How to complete it
- What to do with it when it is complete

Including form examples can be helpful if the original form is lost.

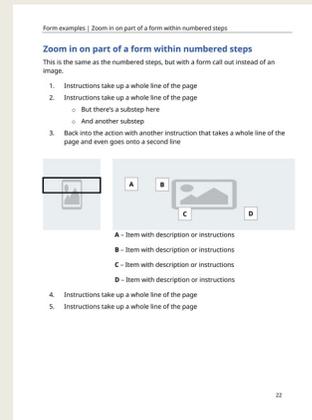
In a pinch, an election worker could rip the example page out of the manual and use it. Or they could duplicate the page on a blank sheet of paper.

There should be instructions on the form itself.

If you find yourself writing long explanations in the manual for how to fill out a form, consider rewriting the instructions on the form itself.

These pages include:

- Callout portions of a form
- 1-page form listing in the appendix
- 2-page spread for complicated forms



Callout portions of a form



1-page form listing in the appendix

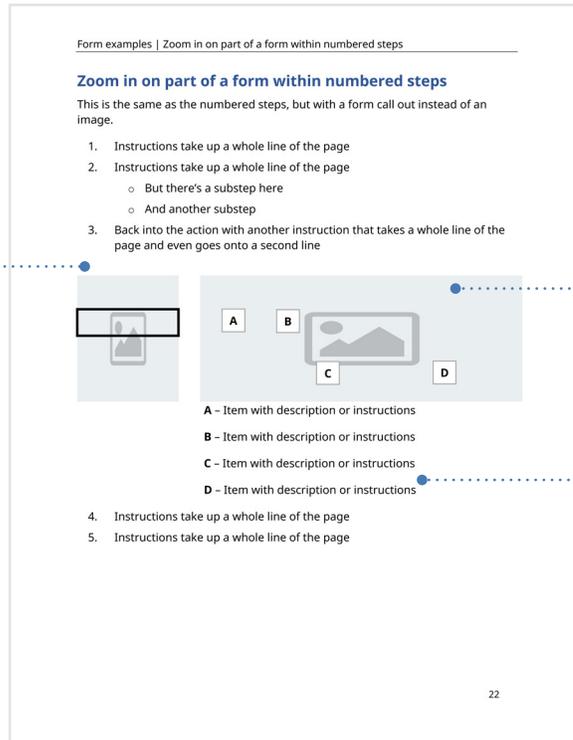


2-page spread for complicated forms



Call out a portion of the form

This page type can be used on a numbered steps page



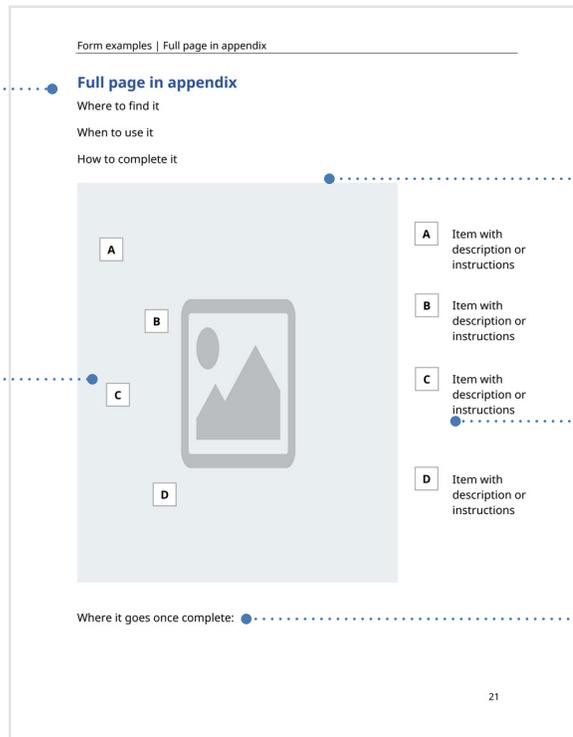
Show full form with a box around the zoomed in area.

Relevant part of the form shown in greater detail.

Legend below box with details about form fields.

1-page form listing in the appendix

Use this if the explanations for filling out the form can be kept short



Explain where to find it and when to use it at the top of the page.

Form fields are marked with letters.

Small version of the full form is recognizable, but isn't intended to be read.

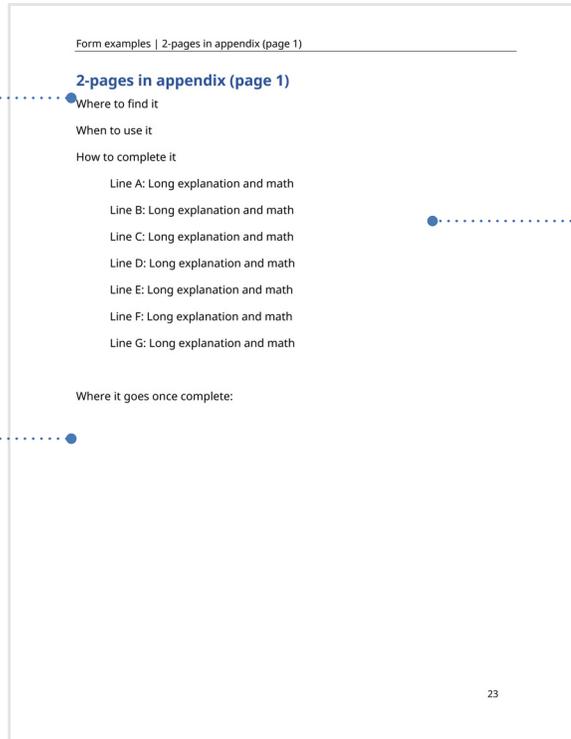
Legend on the side has short explanations for how to complete fields.

Say where to file the form in the same location on each appendix page.

2-page appendix for complicated forms

This should be used rarely, and only for very complicated forms. If you need 2 pages to explain how to fill out the form, that might be a sign that you should revise the instructions on the form itself.

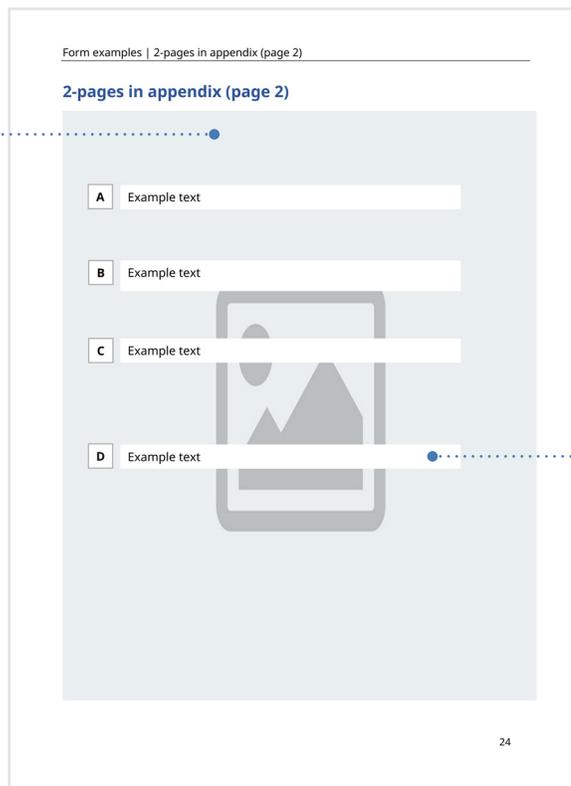
Where to find it and when to use it at the top of the page.



Where to file the form is at the same spot on each appendix page.

Room for longer explanations about how to fill out each field.

The form takes up most of the page so all the text can be read clearly.



Include sample answers for form fields in a different color or font.

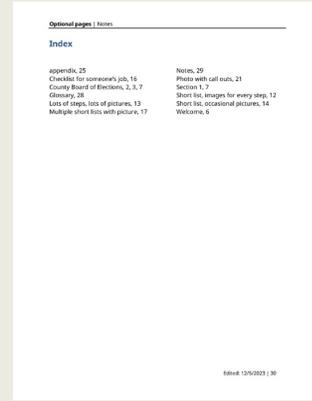
Optional pages

We've included a few optional page layout suggestions. You don't need to use all—or any—of them.

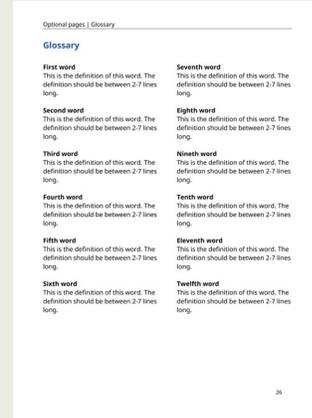
These pages include:

- Index
- Glossary
- Notes

Index



Glossary



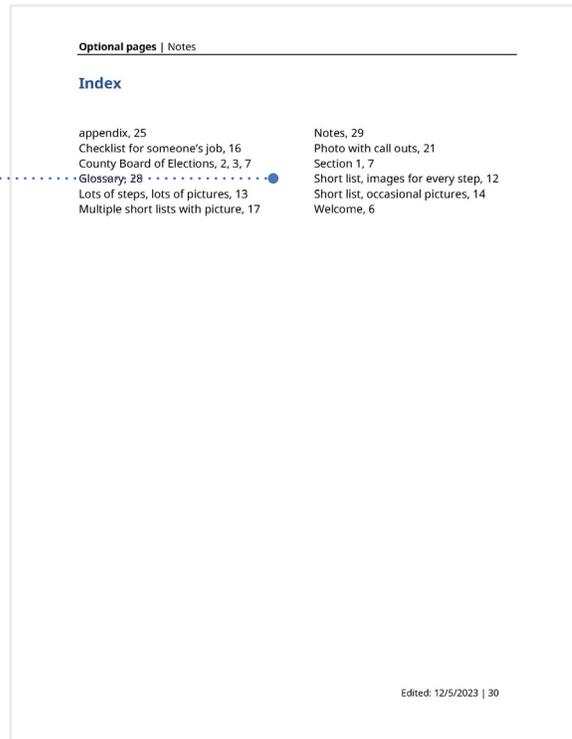
Notes



Index

Requires work to maintain, but an index can be a great addition

2 column layout means that line lengths are short, and easier to read.



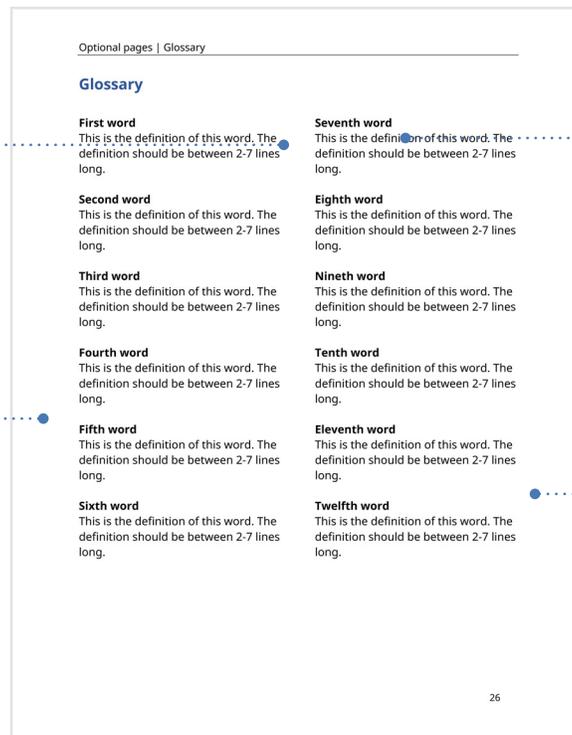
i Read instructions on creating an index in Word.

Glossary

Elections are full of specialized words, a glossary page helps your poll workers keep track of them.

2 column layout means that line lengths are short, and easier to read.

Definitions are between 2-7 lines long.



Key word is in bold on the line above the definition.

Definition is in regular font, below the key word.

Notes

If using the manual during training, consider including note pages at the end of each section. You could also ask team leaders to use this space to record notes throughout the day.

Lots of room to write notes during training.

The image shows a page from a manual with the following layout:

- Header: **Optional pages | Notes**
- Section title: **Notes**
- Main body: A large area filled with horizontal lines for writing.
- Footer: Edited: 2/2/2024 | 27

The research behind these best practices

These guidelines are based on The Center For Civic Design's years of experience with usability testing, observing (and being!) poll workers across the country. Here is a select list of research we drew upon while writing these documents.

Landscape scan of existing manuals from across the country

We collected manuals from around the country, and worked with The Elections Group to catalog the existing page layouts.

Security insights and issues for poll workers

<https://civicdesign.org/topics/pollworkers-security/>

NIST Report: Style Guide for Voting System Documentation

https://tsapps.nist.gov/publication/get_pdf.cfm?pub_id=890039

Field Guides To Ensuring Voter Intent Vol. 4 Effective Poll Worker Materials

<https://civicdesign.org/fieldguides/effective-poll-worker-materials/>

Field Guides To Ensuring Voter Intent Vol. 9 Creating Accessible Online Information

<https://civicdesign.org/fieldguides/creating-accessible-online-information/>

Presentation on writing great alt text

<https://www.slideshare.net/whitneyq/writing-great-alt-text-38937551>

Appendix

Throughout this document, there are blue information boxes that reference resources from across the web. Below is a list of all the references, and the pages you can find them on.

Read more about [creating and customizing styles](#) on Microsoft. Read more on page 6

- Read these [instructions](#) on setting up a table of contents in Word. Read more on page 7
- Download icons from our [Image Library](#) on [ElectionTools.org](#). Read more on page 28
- For more detailed directions about text wrapping in Word, read this [article](#) from Microsoft.. Read more on page 29
- For detailed flowchart creation instructions, read this [article](#) from Microsoft. Read more on page 31
- [Read more](#) about writing great alt text. Read more on page 32
- [Use this decision tree](#) to decide what to write in the alt text. Read more on page 32

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