Expanding Access to By-Mail Voting
A Quick Reference Guide
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In the face of the COVID-19 crisis, expanded Vote-by-Mail is a pragmatic approach to avoid dangerous disruptions to constitutionally mandated national elections. There is on-going discussion among election administrators and security experts about actionable contingency planning. The volume of good ideas is overwhelming. This “Quick Guide” can help planning for expanded by-mail voting this November 2020.

6 Quick Assumptions & Guidelines

1. The activities below represent the typical tasks associated with implementing increased access to by-mail voting. Our checklist is abbreviated to fit on this one-page (two sides). This is intended to be adapted as necessary because of course, no “one size fits all.”

2. If changes associated with by-mail voting are to be implemented for November, start planning now.

3. Focus on extending already-existing workflows, technology, and capabilities—this process under these circumstances calls for caution and its “OK” to be incremental.

4. Of course, you need to retain options for in-person voting.

5. Build trust through transparency and communication; to be transparent, since you’re going to have changed or new procedures, set up observation areas for observers.

6. On the communication side, provide clear voter education and outreach about the changes that will impact their voting experience for November.

Checklist

- **Voter registration.** Advise voters to register in advance and/or to ensure that mailing addresses are accurate.

- **“Excuses.”** Assess existing law or rules to determine changes needed to temporarily expand existing by-mail criteria to “no excuse required;” if legislation is not possible, consider an emergency Executive Order or other rulemaking.

- **Pre-processing ballots.** Assess existing law or rules to determine changes needed to allow pre-processing of ballots before Election Day (without tabulation), to avoid bottlenecks and to allow timely reporting of results.

- **Deadlines for postmarks.** Assess existing law or rules regarding deadlines for receipt of returned ballots to prepare for potential surge of ballots late in the process; consider extending acceptance of postmarked ballots.

- **Ballot distribution.** Determine whether blank ballots will be sent to all registered voters, or whether existing absentee ballot request workflows will be streamlined & expanded to more voters. (Note: Mailing ballots to all voters is more efficient than processing paperwork for a new surge of absentee ballot requests, one by one.)

- If not already implemented, consider procedures to receive online requests for by-mail ballots.

- Assess existing deadlines for voters to request by-mail ballots, and consider any necessary changes.

- **Signature verification procedures.** Document rigorous and consistent signature verification procedures for returned ballots, to be implemented transparently, by bipartisan teams.
Signature exception procedures. Devise workflow to notify voters if their signature is rejected on a returned ballot, and how voters may promptly cure the signature.

Manual re-creation of ballots. Devise workflow to re-create returned ballots that are not suitable for automated scanning, or that are printed on non-scannable forms.

Provisional ballots. Devise workflow to address manual processing of larger numbers of provisional ballots.

Ballot design. Design ballots and voter instructions, including applicable foreign languages and large print.

Envelope packet design. Design by-mail packets, including outgoing window envelope; interior secrecy sleeve; voter instructions; return identification envelope, with pre-paid postage and Intelligent Mail barcode.

Ballot tracking. Plan ballot tracking options for voters, in conjunction with Intelligent Mail barcodes.

Drop-boxes. Plan for returned ballot-drop off locations, with secure ballot drop-off boxes (in addition to accepting ballots at any in-person voting location).

Mailings. Coordinate with local post office to plan timelines for mailing ballots to voters.

Remote ballot marking options. Devise options for remote/overseas voters, or for voters with disabilities who cannot hand-mark ballots (e.g. mark & print on home computer, and then return by-mail).

Ballot printing. Arrange for 3rd-party printing of blank ballots, to meet deadlines.

Ballot packet production. Arrange for 3rd-party production & insertion of by-mail packets, to meet deadlines.

Additional scanning technology. Contact state certification authorities and third-party voting system vendors to identify candidates for additional high-speed scanning software and hardware. (Batch-fed COTS high-speed scanners are lower cost and scalable; hand-fed options may be suitable for the very smallest jurisdictions).

Operations. Consider state-centralized or regionalized high-speed scanning operations, and plan staffing accordingly. Recruit and train additional personnel on receiving, verification, and scanning procedures.

Implement and train for scanning technology. Collaborate with voting system vendors to install any additional scanning software and hardware, if applicable; train staff on use of scanning software and hardware.

Testing. Test all scanning equipment before processing live ballots; conduct a Logic & Accuracy Test, and use every software and hardware feature that will be used during live ballot processing.

Scanning and tabulation. Pre-process and/or scan ballots; tabulate unofficial results on Election Night.

Audit. Perform a post-election audit to support integrity and voter confidence.

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