

Hotline Volunteer Guide

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Hello and thank you for volunteering with Election Protection! With your help, we are going to assist thousands of voters this year and advance voting rights across the country. Without volunteers like you, operating the EP hotline would be impossible and we're grateful you've chosen to donate your time to ensure every eligible voter is able to cast a ballot that is counted.

The information we give and collect is important. We ask you to be precise, detail oriented and committed to doing your best to ensure voters get the most accurate and complete information possible. If you are a first time volunteer, you should review this document carefully to ensure you understand the tasks, responsibilities, and processes EP has put in place so you have a successful volunteer experience!

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Background

Election Protection is the nation's largest and longest-running **nonpartisan** voter protection coalition. Founded in 2001, Election Protection supports a suite of voter protection hotlines and field programs in over 30 states. The Election Protection coalition, convened by the Lawyers' Committee for Civil Rights Under Law, also supports voters through voter education, advocacy with election officials, and rapid response litigation when necessary, to protect the vote.

As a hotline volunteer, you are the first line of communication with voters who contact the hotline. You will be answering voters' questions on issues like finding their polling place's address, checking if they are registered to vote, and taking reports about voting problems they are encountering and helping solve them! All voter interactions are recorded in our database, Our Vote Live (OVL); Lawyers' Committee coordinators, EP coalition partners, state field programs, and senior volunteers monitor OVL to respond to reported problems.

Expectations of Volunteers

Election Protection is nonpartisan and seeks to enfranchise all voters regardless of party affiliation or political beliefs. Nonpartisanship is critical to maintaining public trust in the hotline and maintaining nonprofit status. As representatives of the program during the shift, volunteers are expected to remain nonpartisan including refraining from:

- Speaking about their own political beliefs while actively volunteering
- Asking voters about their intended candidate or party unless it is critical to answering their question (ex. whether they can vote in a party's primary election)
- Trying to influence a voter's opinions, implicitly or explicitly

- Using partisan language or inserting partisan opinions into official EP records such as OVL tickets unless that information is relevant to the incident being reported (ex. It is acceptable to identify the candidate/party in reports of electioneering). If in doubt, directly quote the voter or ask a captain for help.

Any volunteer who behaves in a partisan manner will be immediately removed from the hotline and banned from volunteering in the future.

Note: This does not limit volunteers who aren't on shift from speaking about their political beliefs as long as they do not claim to be speaking on behalf of the EP program or its affiliates.

Privacy

Volunteers may not disclose any information about a voter without their permission and shall not attempt to inappropriately access or export voter information from OVL or other EP platforms. Protecting voter privacy is critical to ensuring the success of the program. Volunteers should also refrain from sharing personal information about other EP volunteers or staff.

Code of Conduct

All volunteers must sign the [Code of Conduct](#) before logging in. Returning volunteers must re-sign the Code of Conduct before their first shift each year, (ex. If you last volunteered in 2023, you must sign again before your first shift of 2024).

The Basics

The Hotlines

Election Protection operates four main hotlines: English, Spanish, Arabic, and Asian languages (English, Mandarin, Cantonese, Korean, Vietnamese, Tagalog, Urdu, Hindi, and Bengali). There are also a few state hotlines, such as North Carolina, that operate under the EP banner.

- English: 866-OUR-VOTE – [Lawyers' Committee for Civil Rights Under Law](#)
- Spanish/English: 888-VE-Y-VOTA – [NALEO Educational Fund](#)
- Arabic/English: 844-YALLA-US – [Arab American Institute \(AAI\)](#)
- Asian Languages/English: 888-API-VOTE – [APIAVote & Asian Americans Advancing Justice \(AAJC\)](#)

The Roles

There are four categories of people in the contact center:

- **Volunteers** who directly assist voters including answering calls/texts, returning voicemails and recording data. Each volunteer belongs to a **team** with a shared captain and a group chat.

- **Captains** are senior volunteers who serve as a resource for volunteers, answering questions, coaching and ensuring the quality of data in OVL. Captains have (Cap) in front of their names in the contact center environment.
- **Leads** are the captains' captains. They are the most senior volunteers. They run contact centers, support multiple teams and their captains, and follow up with voters, among other things. They have (Lead) in front of their names in the chats.
- **Staff** are employees of Lawyers' Committee or EP coalition organizations who oversee contact center operations nationally (LC) or for their state or language hotline. They have (Staff) in front of their names and they have chats specific to their contact center.

The Platforms

Election Protection uses several tech platforms to run the EP hotline, communicate with voters, and follow up on problems. These include:

- **Okta** is a secure sign on system used to access OVL, Twilio, and EP Legal
- **Twilio** is the web-based platform where volunteers answer all incoming calls, texts, and messages from voters. Also called the **contact center**.
- **OVL** is the database where all interactions with voters are recorded as OVL tickets. EP coalition partners, Lawyers' Committee staff and poll monitoring programs follow up on tickets and provide additional help to voters if necessary.
- **EP Legal** is the website that houses all volunteer resources including the FAQs and links for each state, volunteer guides, the Volunteer Code of Conduct, and general information related to hotline procedures. Volunteers should **always consult the state FAQ in EP Legal before giving information to callers**.

The Contact Centers

Contact centers are the virtual version of the original call centers that operated at the Lawyers' Committee office and at law firms around the country on Election Day. The DC National Contact Center operates year-round and takes calls from all 50 states. During even-numbered election years, state and regional contact centers operate, handling calls from different parts of the country. On election days in even-numbered years, additional contact centers are added. Most Election Day contact centers take calls from multiple states, though there are a few that take calls from a single state.

Getting Started

Top Five Questions from Volunteers

1. **Why haven't I received information for my shift?**
 - a. You will receive an email the day before shift, usually around 3 pm. If you have fewer than 12

hours until your shift and you still have not received an email, contact epvol@lawyerscommittee.org

2. I can't log into Okta or am receiving a "maintenance mode" error

- a. Okta accounts are suspended unless you have an upcoming shift. If you are still receiving this error on the morning of your shift, please email epvol@lawyerscommittee.org

3. Where do I sign up for shifts?

- a. Legal professionals can sign up for hotline shifts on [We The Action](#). If you are interested in the poll monitoring field program, you can learn more [here](#).

4. I haven't gotten the link to the training

- a. The training link is included in your shift signup confirmation email from We The Action. Please make sure the email has not gone to spam and add WTA to your contact book. The training can also be accessed [here](#).

5. Can I cancel or reschedule my shift?

- a. Yes, you can cancel or modify your shifts by logging in to WTA and going to the Volunteer page.

Signing up for shifts

All shifts are posted on the EP hotline volunteer management platform, [We The Action](#). After creating a WTA account, you can sign up for any shifts you see. If no shifts are available, there are no volunteer opportunities at the moment. Shifts may open up or be added, so check back if you don't see any the first time.

Once you are logged in, **you can cancel or modify your shifts via the WTA Volunteer page**. Staff monitor shift signups, so you do not need to alert anyone when you cancel a shift unless otherwise instructed.

Training

Ten days before your shift, you will get an email from WTA with [a link to the on-demand training](#). All volunteers for the national contact center are **required to complete this training before their first shift**.

- The training works better on a computer than on a phone or tablet
- You can revisit the training as often as you want. (Resources are also available on EP Legal.)
- Your progress in the training is automatically saved. If you enter your name and email, you will be taken back to the module you were last working on. Select Retake the Training if you want to take it again.

A note on expectations: Your first shift on the hotline can be overwhelming. No one is expected to log on for their first shift (or even their second or third!) having fully mastered the systems or being completely comfortable talking to voters. The only requirement for your first few shifts is that you make a good faith effort and ask for help when you need it. There is a captain for every shift. The captain's job is to support you and they're happy to answer your questions! We recommend first-time volunteers log in fifteen minutes early to orient themselves before their shift officially begins.

Technology Requirements

A few computer settings and applications can interfere with the Election Protection systems. Making the recommended changes ahead of your shift allows you to get to calls with voters right away rather than dealing with technical problems.

Use a personal computer if possible.

Tech problems are often the result of firewalls, VPNs, or other security features required by many law firms. Switching to a personal computer almost always fixes connectivity problems as long as you **disconnect from the VPN before opening Chrome.**

Using Chrome browser is required.

If you do not have Chrome, you can download it [here](#). Twilio and OVL are designed to be compatible with the Chrome browser and may not function consistently on other browsers.

Do not use a tablet or phone.

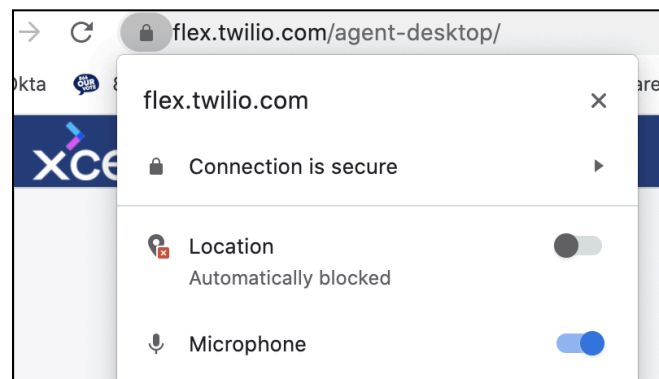
You must have access to a computer to volunteer. Twilio and OVL are not optimized for phones or tablets and you will not be able to use critical features.

Do not use an incognito window

Incognito windows will prevent some of the Twilio functions from loading correctly.

Make sure Chrome has permission to use your microphone.

You will be prompted to give access when you open Twilio. If you accidentally decline permissions or want to check, open the security settings by clicking the lock next to the URL and toggle the microphone slider to on.



Close other apps using the computer's microphone.

Zoom, Teams, Jabberchat, or other applications with access to the microphone can interfere with your microphone when you are taking calls. If you believe one of these apps is causing problems, close it and refresh your browser.

Logging In

The day before your shift, you will receive a shift reminder email from epvolunteer@866ourvote.org. It includes information about accessing your Okta account, volunteer updates, and a link to the [Code of Conduct](#) that all volunteers need to sign before their first shift. The Code of Conduct needs to be

re-signed every year. If it is your first shift, you should have also received an activation email from Okta (noreply@okta.com).

To log in:

- **First time volunteers:** Click the link in your activation email. You will be prompted to set up a password and log in. If you did not receive an email, please check your spam folder. The link in the email can only be used one time and expires after 30 days.
 - If you need a new activation link or cannot find the email, contact epvolunteer@866ourvote.org.
- **Returning volunteers:** Please go to electionprotection.okta.com and login using your email and password.
 - If you do not remember your password, click “Need help signing in?” and then “reset password.” If you do not get a password reset email, check your spam folder first, then email epvolunteer@866ourvote.org.
 - **Do not try to login through your initial activation link as this will lock your account.**

Your Shift Checklist

Before your shift

- Check the elections calendar and review the Hot Topics on EP Legal to familiarize yourself with issues likely to come up during your shift
 - Look over the state page and state Hot Topics for states with upcoming elections.
- Announce yourself to your captain in the shift chat and read any guidance they’ve posted in the chat
 - If you are a first-time volunteer, let your captain know.
- If it’s been a while since your last shift
 - Review the [Volunteer Refresher Toolkit](#)
 - [Check your audio](#) to be sure your microphone is working and that you can hear callers
- If it is your first shift or the first time you are volunteering in the current year, sign the [Code of Conduct](#)

During your shift

- Keep your status updated and tell your captain before you take a break
- Stay up-to-date on your shift chat, DMs, and any announcements
- Ensure you give accurate information to voters and ask for help if you need it
 - ALWAYS check the state FAQ on EP Legal before giving information to voters
- Abide by OVL ticket quality standards and always consult a captain before escalating a ticket

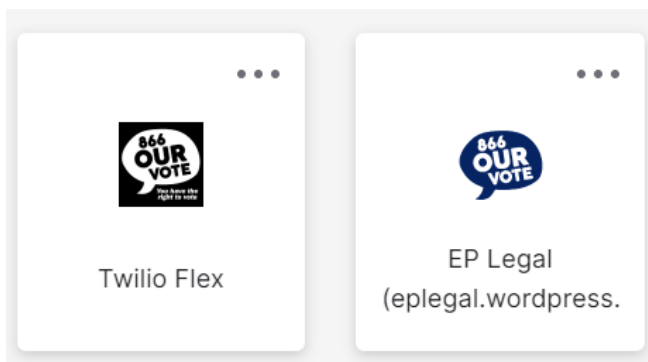
At the end of your shift

- Complete any ongoing voter interactions whether by text or by phone.
 - If your task is a chat or text and the voter is not responding, please let the voter know you are ending the interaction and they should contact the hotline again. Note that in the ticket and end the interaction.

- Make sure your final OVL ticket is complete and submitted
- Set your Twilio status to “offline” so that you will no longer receive new task requests
- Check with your captain if anything further is needed before logging off
- Close Twilio
- Log out of Okta

Before Your Shift

Open Your Apps



After logging in to Okta, you’ll be able to access the platforms for your shift. Make sure you have easy access to all three apps throughout your shift.

- OVL and Chat are accessed on your Twilio desktop.
- EP Legal can be opened on a second monitor
- **Twilio should only be open in one tab.**
 - **Having multiple Twilio tabs will affect your ability to take and end interactions.**
- Switching between tabs or windows will not end calls or cause you to lose data in OVL
- You can adjust the size of OVL and the chat screen in Twilio by moving the divider between the task panel on the left and the OVL panel in the middle.

Find Your Chat and Say Hi

Chats are the main form of communication for volunteers and captains on the hotline. The chat window is on the right panel of your Twilio page. **You should have access to three chats, plus any direct messages (DMs) that come in to you.**

Chats:

- **Shift Chat**
 - This is where you talk with your captain, ask questions and communicate with your fellow volunteers. Most of your messages should happen in the shift chat.
 - Name: [Date] [Start Time] [Call Center] [Team #]

- Example: 04-18 9:00 AM DC Call Center Team 1
- **Announcements Chat**
 - Where all contact center-wide updates are posted. These chats are read only. If you have a question about anything in the announcements chat, ask your captain in your shift chat.
 - Name: [Date] Announcements
 - Example: 04-18 Announcements
- **Tech Help Chat**
 - Used for troubleshooting technical issues for any hotline platforms. If reviewing the [Hotline Tech FAQ](#) does not solve an issue, ask for tech help here rather than in your shift chat.
 - Name: [Date] Tech Help
 - Example: 04-18 Tech Help

If you do not have access to any of the above chats, DM your captain. If you cannot see chats at all, email epvol@lawyerscommitte.org.

Once you're in your chat, **greet your captain and teammates**. If you're a **first-time volunteer**, let your captain know. Review earlier messages and announcements posted by your captain.

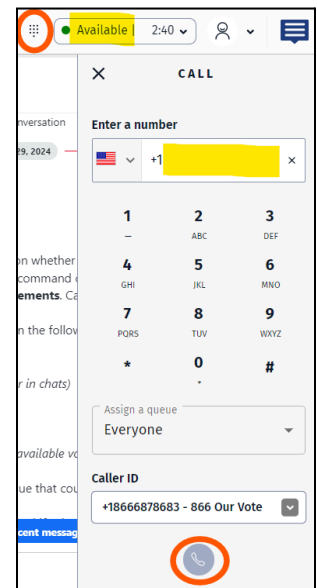
Review Your Materials

Before you start taking calls, you need to make sure you're up-to-date on substantive information. You'll need to **review the Hot Topics on the [EP Legal homepage](#) and the [election calendar](#)**. If there is an upcoming election, please also go to that state's page and familiarize yourself with the material.

Test Your Equipment

If it is your first shift or it has been a while since you volunteered, before taking calls, you need to make sure your audio is working.

1. If your status is offline (see below), change it to available.
2. Open the dial pad on the top right
3. Make a test call to a number of your choice. It's usually easiest to call your cell but you can also call a friend.
4. Check that a) you can hear the person speaking into the phone; and b) they can hear you. If you're using a cell phone, put whichever device you're not talking into on mute. If your microphone is not working, see the audio issues section of the [Hotline Tech FAQ](#).

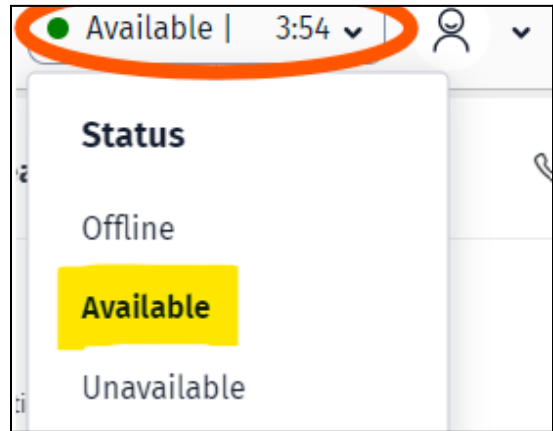


Change Your Status

After you feel comfortable with the materials, turn your status to available and start talking to voters! To change your status, click your name at the top right and select the appropriate status. **Unless your status is available, you will not get calls** or other contacts from voters.

Statuses are as follows:

- **Available** - online and ready to take calls
- **Unavailable** - If you miss a task invitation i.e. an incoming call, your status will automatically be set to unavailable. You should not set your status to “unavailable” during a shift.
- **Break** - away from your computer or need to pause incoming tasks. Check with your captain if you want to request a break of more than a couple minutes.
- **Offline** - You cannot make outgoing calls and will not get notifications about new tasks while your status is offline. The offline status is only used when logging off at the end of the shift.



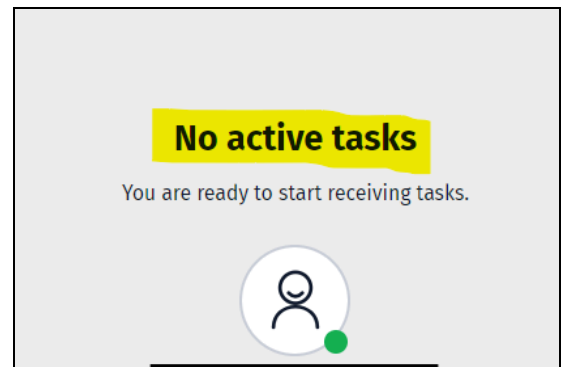
Your captain is there to support you.

Never hesitate to reach out to them if you have a question, don't know how to handle a call, are experiencing tech problems or for any other reason.

Basic Troubleshooting

The first step in troubleshooting is always to refresh the page and/or close out and reopen it. Note that you **should not refresh or close Twilio while you are on a call as it will hang up on the caller.**

- If your tech problem has come up while on the phone with a caller, alert your captain and write down all the information for the call in the event you have to refresh your browser.
- If you refresh before submitting your OVL ticket, you will lose the information in the ticket, thus your written notes will be important.
- Make sure to destroy and dispose of these notes after your shift to protect caller confidentiality.



During Your Shift

Taking Tasks

In Twilio, interactions are called Tasks. See available How Do I? materials on EP Legal [Hotline Guides](#) page for more information on accomplishing various types of tasks in Twilio.

Asking for Help

If after checking the resources on EP Legal you still don't feel confident in the answer you are going to give to a voter's question, you should **send a message to the captain in your shift chat with the question, the state the question is about, and any information you've already learned.**

- DO NOT direct message (DM) substantive questions to the captain since it's likely that another volunteer will have the same question and sharing information helps all volunteers. If a captain thinks it is best to talk in DMs, they will DM you.

Dos and Don'ts When Talking to Voters

Do

- **Remain nonpartisan**
- **Give accurate information.** Most voters are fine with being put on hold while you look up the answer to their question. **Take the time to get it right.** Check the [resources section](#) for more information.
- **Give the voter everything they need to successfully vote.** Let them know their options, identification requirements, voting hours, etc. Knowledge is power when it comes to voting.
- **Be understanding.** Navigating voting obstacles can be frustrating for voters and we want them to know we are here to help.
- **Ask the caller the demographic questions in OVL.** Asking for demographic information can feel awkward and some voters will be uncomfortable and refuse to answer. That's fine. Know that it is extremely important that you ask as this data helps Election Protection spot trends, including race-based discrimination and voter suppression; it also helps us plan EP programs. Suggested script:
 1. "I have two quick questions before you go"
 2. "How did you hear about our hotline?"
 3. "To help us better understand the communities we're helping, would you mind sharing with me what race and/or ethnicity you identify with?"
 - a. You can add, "It's okay if you don't answer, but I'm required to ask."
- **Make sure you're calling back at a reasonable hour for the caller's timezone,** preferably after 10 AM (ex. Don't call back someone from CA at 10 AM ET). This may not apply on Election Day for voicemails that are left shortly before the hotline opens.

- Press the **requeue button** to return a voicemail to the queue so it can be returned by a volunteer later, at a more appropriate time. If there are no more voicemails from appropriate time zones, let your captain know and they will pause voicemail tasks until later in the day.
- **Use the “How Do I?” materials in the Guides section of EP Legal** for information on common questions about hotline procedures.

Don't

- **Fill out forms on a voter's behalf.** This is illegal in many states and it is easy to accidentally enter incorrect information, like misspelling a voter's name.
- **Ask a voter about their political beliefs** unless the information is necessary to answer their question (ex. “Am I eligible to vote in the Democratic primary?”)
- **Talk about your political beliefs.** If the voter asks you directly, tell them Election Protection is a nonpartisan program and you cannot discuss your personal views as you are representing the program.

When speaking to voters, accuracy is much more important than speed.

Voters are almost always happy to stay on hold for a couple minutes while you do research. Giving out incorrect information may prevent the voter from voting or damage EP's reputation.

If you realize you may have given inaccurate information to a voter, immediately alert your captain.

Other Tips on Talking to Voters

- When texting or messaging a voter, keep in mind that a voter may screenshot and share your response. It is particularly important to remain polite, nonpartisan, and give out accurate information.
- You are not required to continue talking to or respond to a voicemail from anyone who is being **rude or making you uncomfortable**. This does not happen frequently, but if it does, alert your captain and they can coach you on how to respond. If necessary, staff can block the number.

Breaks

The expectation is that hotline volunteers will be available to take interactions for the entire shift.

Volunteers may take short breaks after first notifying the captain. Before stepping away, set your status to break. **If you need to be gone for more than a couple of minutes, discuss that with your captain.**

Calls not from voters

Occasionally people other than voters will call the hotline because they want information or to become involved with the Election Protection program. Please redirect them as instructed below:

- **Press** - tell them to email press@lawyerscommittee.org. Do not answer questions or give out any information.
- **Donations** - Anyone claiming to represent a foundation, business, or individual seeking to make a donation should be directed to email donations@lawyerscommittee.org or to fill out the donation form online (<https://www.lawyerscommittee.org/make-a-donation>). You may confirm that we are a 501(c)3 organization. Do not fill out the donation form for anyone or provide information about Lawyers' Committee. If they want information about Lawyers' Committee, you can direct them to the website - www.lawyerscommittee.org.
- **Prospective volunteers** - Inform them that they can find more information on the EP website (<https://866ourvote.org/volunteer>). If they are calling on behalf of another nonprofit, a law firm, or are affiliated with a law school, ask them to email epvolunteer@866ourvote.org. If they are interested in the poll monitoring program or are not a legal professional, direct them to <https://protectthevote.net/>
- **Election officials** - alert your captain and ask them how the call should be directed.

OVL Ticket Standards and Procedures

All OVL tickets must be complete, accurate, and nonpartisan. Ticket descriptions should not include any personally identifying information (PII) that could be used to identify a voter.

OVL Ticket Standards

OVL tickets are only as useful as the quality of the data entered, both for immediate follow-up or for long-term use like policy, advocacy, or litigation. You must comply with the ticket standards below; if you are ever unsure about something, ask your captain.

Clear and Complete

OVL tickets should be **concise and precise**. Anyone reading the ticket should be able to understand the voter's question or issue and exactly what information you gave them. Be as detailed as possible when describing any follow-up you did and be sure to ask the voter clarifying questions if you need to. If you contact an election official, please note their name in the ticket details, including the number called or the email used.

Personally Identifying Information (PII)

The only voter PII in an OVL ticket should be in the form fields; there should be no voter PII in the call description or resolution sections of the OVL ticket. PII includes anything like the voter's full name, or combinations of information like name and birthdate. If there is PII that is essential to understanding or following up on the ticket and does not match up with any of the form fields, ask your captain what to do.

It is acceptable to name election officials, poll workers, and elected officials in the OVL narrative as they are serving in a public capacity and may need to be contacted again.

Nonpartisanship

The ticket description and resolution must not include any partisan language, your own political beliefs, or be biased in any way. The exception is information that is essential to understanding the question or following up on the issue the voter is reporting. For instance, it is fine to identify the name of a candidate who is electioneering; identify the political beliefs of a group of voters targeted by voter intimidation; or note details about partisan clothing a poll worker is wearing. In these cases, it is usually best to directly quote the voter. If you are unsure whether something should be included, ask your captain.

Demographic Data

Include all demographic data including how the voter heard about the hotline and their race/ethnicity. Not all voters are comfortable sharing and **it is fine to use the "could not collect" option as long as you have made a good faith effort to collect the information.** Best practices on asking the questions are in the [Dos and Don'ts When Talking to Voters section](#).

Voicemails

Voicemails can be difficult as there is not always enough information to create a quality ticket. Please follow these guidelines:

- Always write "VM" at the start of the ticket description
- If you reach the voter, record all information as if you were taking an incoming call and follow all normal ticket guidelines
- If you are unable to reach the voter, fill out the information below to the best of your abilities given the information in the voicemail.
 - Form fields for voter name, state, and contact information should be filled out if that information is provided.
 - If you left a voicemail, include all information you gave them in your message
 - If you were unable to leave a message, note why in the ticket description (ex: voicemail not set up or voicemail is full).
- Most voicemail tickets in situations where you could not reach the caller will be closed. If the voter calls back, the ticket can be added to and escalated if necessary.

- **In rare instances, voicemail tickets may be escalated even if the caller cannot be reached if the message indicates a widespread problem at a specific polling location. Talk to your captain before escalating.**

One Incident and One Voter Per Ticket

Each ticket should only include questions from one voter or one report of an incident at a polling place.

- If multiple people call from the same household or phone, a separate ticket should be created for each voter.

Reports from EP Volunteers in the Field

If the interaction is from an EP field volunteer, mark as Election Protection Volunteer in Who is Calling?

State-specific Guidance for OVL Information

- Some states have provided **specific instructions for certain issues reported in OVL tickets**; it will be included on the state guidance page. This can include having volunteers ask certain follow-up questions for specific issues.
- **ALWAYS check the state hot topics and the FAQ before answering voter questions.**
- If you **spoke to an election official**, note their name and contact information in the ticket description.

Ticket Review

Once a ticket has been submitted, it will be reviewed by a captain to ensure it complies with the standards above. If a ticket does not comply with the standards, your captain may DM you and ask you to correct it. This may include calling the voter back to get additional information or correct and complete information given in the initial call. Captains may also reach out if a volunteer is consistently failing to ask demographic questions or is making the same errors across multiple tickets.

Updating a Ticket

1. Enter the phone number associated with the ticket as if you were creating a new ticket. Your captain can give you the number if you do not have it. Click Next.
2. Select the relevant ticket from the search results and click on it to open.
3. Edit/add information to the narrative sections, add comments/upload items, and/or edit the information in the form fields.
4. Click "Save Changes"

Escalations

When submitting a ticket, you will indicate whether or not to **escalate** it. Escalating a ticket flags it for EP Partners and LC staff that further action is needed to help the caller. **Volunteers must always ask a captain before escalating a ticket.** Escalated tickets generally fall into one of four categories (discussed below), which can help you identify when to flag an issue with your captain.

Escalation Basics

Always confirm with your captain before escalating a ticket, but as a rule of thumb any issue that can have a widespread impact in preventing or impeding registration or voting is escalated

- **Issues that affect a large number of voters** include the state’s voter registration site not working, or problems at a polling location, like running out of ballots, are **almost always escalated**.
- First-hand reports of **voter intimidation, suppression, disability access issues, and mis- or dis-information** are **almost always escalated**.
- **Complex issues** that require follow-up are **usually escalated**.
- **Complex questions** you cannot answer are **sometimes escalated**.
- General questions or requests for information are usually not escalated

Always check the state page on EP Legal for state-specific escalation instructions.

EP coalition organizations, LC staff and attorneys, field programs, and volunteer leads monitor OVL for open tickets. They are responsible for following up on reported problems and issues, including but not limited to sending a field volunteer to investigate issues at polling places, speaking to election officials, and/or interpreting complex statutes.

You may hear tickets you’ve escalated referred to as “open tickets.” Escalation is the action; escalating creates an open ticket that Partners and staff see on the backend of OVL.

Complex issues/Issues that affect large numbers of voters

- Problems for which a voter has already attempted the standard course of action but that have not been resolved and/or require on the ground follow-up by EP state partners.
- A problem the volunteer was able to resolve for an individual voter but may indicate a more widespread issue that will prevent others from voting.
- Examples:
 - A polling place does not have adequate signage and has no ADA-compliant entrance
 - A voter without housing whose registration application has been denied inappropriately
 - State voter registration webpage not functioning properly
 - A polling place attempting to close before everyone in line at close of polls has voted

Voter intimidation, suppression, and mis- or dis-information

- Any account from a voter who *personally* experienced and/or witnessed voter intimidation, voter suppression, and/or mis- or dis-information
- Always escalated as long as the voter has firsthand knowledge of the situation
- Examples:
 - A poll worker is asking Latinx voters to show photo ID even though it is not required
 - Someone near a polling place is openly carrying a gun

- Police presence near a polling place
- An election official is incorrectly telling people their absentee ballots must be returned the day before the election

Complex questions

- This category covers voter questions you and your captain have not been able to answer using provided resources.
- Examples:
 - Ambiguity about whether someone qualifies to vote absentee
 - Establishing the state in which an active duty military voter may register to vote
 - Ambiguity about whether someone's right to vote has been restored after a felony conviction

General questions or requests for information

- These are voter questions that are easily answered using EP resources
- The majority of OVL tickets fall under this category
- Almost always resolved
- Examples:
 - “Where is my polling place?”
 - “How do I request an absentee ballot?”
 - “Do I need to show an ID when I go to vote?”

State-specific guidance

Occasionally, there are problems in a state for which different escalation procedures apply. Examples include widespread issues that would usually be escalated if it was the first report, but have a partner already working on the issue. Alternatively, you may be asked to escalate tickets that would normally not be, such as escalating anything related to a specific polling place regardless of the type of call. This type of guidance will often include instructions on what to tell voters who call about the issue. **ALWAYS check the Hot Topics of the relevant state for the latest instructions.**

What if a ticket already exists for a phone number?

Occasionally, the hotline gets multiple calls from the same phone number, either a voter calling back to follow up or another member of their household calling with their own question. If you enter a phone number into OVL and you get the message, "Someone at this number has contacted the hotline previously," all tickets associated with the phone number will be listed including when they were last updated and a preview of the ticket description.

If it is a new person or issue for this election, click Start a New Ticket and create a new ticket as normal. As a rule of thumb, if the ticket has not been updated in the past two weeks, you should create a new one.

SELECT A TICKET TO EDIT

Someone at this number has contacted the hotline previously.

EXISTING TICKETS

START A NEW TICKET

2440 • Created yesterday • Tarrant, Texas

UNASSIGNED •
CLOSED ▾

Reviewed

QC Problem

Caller wanted to confirm if registered to vote and how to get absentee ballot

Call outcome
caller provided consent to confirm registration; used Texas SOS online...


(Question) Absentee/Mail-In Voting • White

Editing a Ticket

You can edit an existing ticket by clicking anywhere in the ticket box to open it. **In most cases, you should create a new ticket.** The only exception is if the same voter is calling about the same issue for the same election. Then, edit the ticket and write: UPDATE before the new information.

Call Outcomes

caller provided consent to confirm registration; used Texas SOS online look up to confirm caller was registered to vote; reviewed FAQs regarding Texas mail in ballots; confirmed caller was over 65 and eligible to apply for mail in ballot; texted caller a link to the mail in ballot application and confirmed caller had printer to print out application; per FAQs informed caller that he could email application to county clerk and texted caller email, but also informed caller that per instructions on application he should also mail the application in to the mailing address included on the application

Edit 

Resources for Volunteers

All volunteers are responsible for knowing the resources on EP Legal and how to navigate the site. You should be able to answer basic questions such as “Am I registered to vote?” (including finding the official registration lookup site) without help from your captain.

EP Legal

EP Legal is your first source for answering all voter questions. EP Legal has general and subject guidance, Hot Topics, state guidance pages including state FAQs, and links to important sites.

As with Twilio and OVL, EP Legal is accessed via Okta. If you have received the shift reminder email from staff, you should be able to view EP Legal.

Operational Guidance

- Important information that applies to all calls, regardless of state or issue
- Examples: How to handle press calls or donor calls, link to the Volunteer Code of Conduct, and hotline hours, the numbers to the EP language hotlines, etc.
- Accessed under the “General Information” menu option

Subject Issue Guidance

- Guidance on hotline tech, hotline expectations and procedures, troubleshooting, and reference documents
- One-pagers on specific questions like how to transfer a call can be found under the “How do I” menu
- Accessed under the “General Information” menu option

Hot Topics

- Urgent information about current issues in a state, questions not addressed in the FAQs, and scripts for responding to specific questions, etc.
- Most state-specific Hot Topics are posted on the state homepage
- National Hot Topics are posted on the homepage

State Guidance Pages

- Every state has its own page in EP Legal with state-specific information including:
 - Links to important websites like the voter registration and polling place lookups
 - Hot Topics for the state
 - Important dates like voter registration deadlines and information about upcoming elections
 - FAQs (see below)
- Accessed via the “State” menu in EP Legal.

FAQs

FAQs are your main resource for answering voter questions and the questions are uniform across all FAQs. The FAQs are divided into eight sections with questions and answers addressing:

1. Registering to Vote
2. Election Day Voting
3. Early Voting
4. Vote by Mail

5. Absentee Voting
6. Polling Place Issues
7. Accessibility/Assistance
8. State Specific Supplement

The document is updated each election cycle and goes through multiple rounds of review.

If the question or issue is not addressed in the FAQ, then check the national Hot Topics, then check the Hot Topics on the state page. If you cannot find information about the question/issue or if you find contradictory information between the FAQ and a government site, ask your captain for assistance.

A NOTE ON RELIABLE SOURCES OF INFORMATION

It is very important the Volunteers consider the reliability of the source for the information they are providing to voters. **The FAQ document is updated and reviewed by law firms, EP program attorneys, and state EP partner staff and is your primary resource.** You can trust the links in the FAQs and on EP Legal as these have all been vetted.

If a new issue arises in a state and there is no information on EP Legal addressing the issue, you may need to use the internet to find out more. **When using information or websites not listed in the resources on the state page, be sure the information you are giving is from an official state/county/town webpage with .gov in the URL.** EP Legal or a .gov website may link to pages that do not have .gov in the URL but if you got to the site from EP Legal or by clicking a link in a state/county/town .gov page, then you can consider that information reliable. A common example is that many states use third-party vendors for tracking ballots, which may have a .com or .net URL.

Do not use news stories as a resource for information to voters. You can read the news story to get information or background on the issue, but the only information given to voters should be from resources provided by Lawyers' Committee via the EP Legal website or information from state/county/city/township .gov websites.