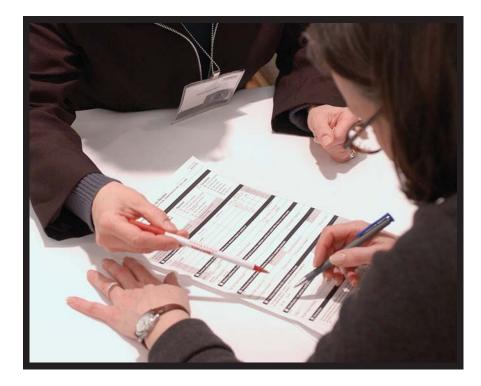


PROCEDURES FOR THE REVISION OF THE LISTS OF ELECTORS Election or Referendum









A MANUAL FOR Revising Agents Using Forms



A Manual for Revising Agents Using Forms



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Revision Record



The *Revision Record* lists changes made only to the electronic copy of the *Version* listed below. Please print only the pages described under *Comments*, and substitute them in your printed manual to ensure that it remains current. The *Date Published* appears at the bottom of new or changed pages.

Version	Date Published	Comments
EC 40233 (03/10)	March 2010	Initial release.

Message from Elections Canada

The purpose of this manual is to describe and document the current procedures required for a revising agent to complete tasks associated with the revision process. This manual also explains the parts of the *Canada Elections Act* that apply to a revising agent.

This manual is your main source of reference for all aspects of revision. Please read it carefully before you begin your revision duties. While you work, keep your manual at hand and refer to it whenever you need to clarify a procedure, complete a task, or answer a question from an elector or another election official.

The manual is yours to keep. Although it emphasizes the key elements of the revising agent's job, you may choose to make notes in it about things you particularly want to remember once you begin your job.

Voting is an important part of our democratic society. Revising the lists of electors is a key step in making the voting process an easy and pleasant experience for the elector.

Your role in updating the lists of electors and in ensuring the accuracy and integrity of this process is essential to our success. Please try your best to make this happen.

A new section entitled **Reference Material** has been added to this manual. It includes: a summary of the decision taken by the Canadian Human Rights Tribunal in the case of Reverend Hughes, a corresponding case study, and pertinent sections of the Canadian Charter of Rights and Freedoms and the Canadian Human Rights Act. This material is mandatory reading.

Important Information about Revision

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The masculine gender is used throughout this manual without bias in the interest of simplicity and ease of reading.

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Chapter 1 – Introduction

This manual will help you carry out your duties and responsibilities as a revising agent for Elections Canada. Read and review the manual several times before you begin your work. Keep it on hand as a reference tool to help you follow correct procedures and to solve problems.

One way to register electors is by using computer software called REVISE. With REVISE, revising agents who work in the office of the returning officer will process elector requests using the computer, while those working outside the office will use paper forms. Either way, the revision process using forms and the computer-based revision process are similar.

Objectives

In this chapter, you will learn how to use this manual.

Note to Those Who Served in Previous Electoral Events

It is very important that you follow the procedures in this manual as outlined. If you served as a revising agent before, please note that there may have been legislative amendments or changes to procedures since the last electoral event or since you last held this position. Any new procedures are included in this manual and must be followed.

For those of you who have served in an electoral event at the territorial, provincial or municipal level, please be aware that procedures and legislation are different at the federal level.

1.1 How to Use This Manual

This manual is a multi-purpose document designed to be used as:

- a training workbook, and
- a job aid to help you complete your revision duties.

The manual is divided into six instructional chapters. Each contains information about a specific topic or task, and each ends with questions to help you to evaluate your understanding of the content.

The answers to the questions are in the <u>Answer Key</u> near the back of the manual. You will also find definitions of terms, descriptions of revision tools, and an index to this manual. Please familiarize yourself with all parts of this manual before you begin your revision activities.

Styles Used In This Manual

This manual uses several layout elements to draw your attention to items of interest:



Special notes that you should review carefully.

Bolded and italicized text with a grey background indicates content that is particularly important.

Within text, underlined and italicized text indicates hyperlinked cross-references (for example, see <u>section 1.3, Chapter Checkpoint</u>).

1.2 Key Points from This Chapter

- This manual will be your main source of reference during the revision period. Please read it carefully before you begin your duties.
- It is very important that you follow the current procedures described in this manual.

1.3 Chapter Checkpoint

To test yourself on the content in this chapter, answer the following multiple-choice questions. (The answers are provided in the <u>Answer Key</u> near the back of this manual.)

- 1. This manual is:
 - a) A job aid to help you conduct your revision duties
 - b) Divided into six instructional chapters, each focusing on a specific topic
 - c) Your main reference for your job as a revising agent
 - d) All of the above
- 2. This manual:
 - a) Is the property of Elections Canada and should not be marked or defaced in any way
 - b) Is yours to keep
 - c) Should be returned to the returning officer once the election is over
- 3. This manual highlights the differences between provincial/territorial and federal revision practices.
 - a) True
 - b) False

Chapter 2 – About Revising Agents

Objectives

In this chapter, you will learn about:

- the roles and responsibilities of revising agents,
- · where and when revising agents work, and
- other election staff who support revision activities.

2.1 Roles and Responsibilities of Revising Agents

Revising agents play a crucial role in updating the *Preliminary List of Electors* by receiving applications for registration or revision through the mail, by fax, by telephone, or in person.

Your activities include:

- receiving electors and completing and processing revision forms, and
- securing revision documents.

Revising agents are required to work in pairs to ensure the integrity of the revision process and to verify each other's work at the end of their shift.

2.2 Non-partisanship

You are responsible only to your returning officer. You are not responsible to any political party or candidate.

As a revising agent, you must not participate in partisan political activities from the beginning of your appointment until the end of your term, which may extend until polling day.

This means, for example, that you:

- answer only questions that relate to the electoral process,
- must not provide opinions or display material that supports or opposes a political party or candidate while performing your duties, and
- must not work for any candidate or political party or attend any political functions or meetings, even in your off-duty hours.

Some people might try to take advantage of a revising agent who is unsure of his duties. Learn the rules so you are not pressured into making the wrong decisions.

2.3 Oath of Office

Before you begin working, the returning officer, the assistant returning officer or a person delegated by the returning officer will administer the *Appointment and Oath (for election or referendum officers)* (EC 10130) form. The form establishes your authority to act in an impartial manner as a revising agent. You should keep it with you at all times while you are working. Please do not lose it!

Personal information from this form is also used to process your wages. Make sure this information is accurate.



A consent box is included on the *Appointment and Oath (for election or referendum officers)* (EC 10130) form. Select this box if you would like to give Elections Canada permission to share your information with other electoral agencies.

2.4 Guidelines for Greeting and Serving Electors

Treat every elector as a customer. Be polite and pleasant. Your goal is to have the elector leave with a positive impression of you and the office of the returning officer.

Each time you speak with an elector:

- in order to respect the bilingual offer of service, greet the elector in both official languages,
- smile, make eye contact, and say "Good morning," "Bonjour," "Good afternoon" or "Good evening"; speak with a pleasant, positive tone of voice; if speaking on the telephone identify yourself as a revising agent with Elections Canada,
- stop what you are doing and focus on the discussion,
- ask how you may be of assistance,
- listen attentively,
- ask questions to clarify,
- ask for help from a colleague or the revision supervisor if you need it, and
- make sure that the elector has been offered all available options.

Occasionally, an elector may become angry or upset. Do not take the situation personally. Allow the elector to vent. Let him know that you appreciate his situation. Try to resolve the situation quickly and efficiently. If necessary, refer the matter to your revision supervisor.

Courtesy and Rules of Conduct

As a representative of Elections Canada, you are expected to conduct yourself this way:

- be polite at all times,
- dress appropriately,
- wear your *Election Personnel Identification Card* (EC 50210), and
- carry your Appointment and Oath (for election or referendum officers) (EC 10130) form.



Keeping a customer service mindset and making the experience a positive one for the elector is an important part of your job. Practise by treating other Elections Canada personnel as though they were customers.

2.5 When Revising Agents Work

Revising agents work during the revision period, which usually begins on Day 33 of the electoral calendar. By law, the last day of revision is six days prior to polling day, ending at 6:00 p.m. This means that revision activities usually last 28 days.

It is important to know the actual calendar dates that correspond to the revision period so you can advise electors that they need to return forms or provide identification before the deadline.

The revision supervisor establishes hours of work. These may involve daytime and/or evening hours. The specific revision task and location of work also influence work schedules.

2.6 Where Revising Agents Work

The nature of revision activities means that you could be asked to work in a number of different locations. These could include one or more of the following:

- Office of the returning officer,
- Additional (or satellite) office of the returning officer,
- Revisal sites, such as malls or student residences,
- Newly developed and high mobility areas, and
- Institutions, nursing homes and chronic care facilities.

2.7 Who Revising Agents Work With

Revising agents work in pairs. However, you will not always work with the same person. You may work individually only when performing clerical duties such as:

- filing forms, and
- sorting Voter Information Cards that Canada Post has returned as undeliverable.

Other Staff who Support Revision

It takes the efforts of many people to update the *Preliminary List of Electors* (PLE). Other positions that support revision include the following:

- Returning officer: Responsible for the administration of the electoral process within the electoral district;
- Assistant returning officer: Assists the returning officer;
- Automation coordinator: Provides technical support for all automated systems in the returning office;
- Revision centre clerks: Work during peak period of data entry;
- Revision supervisor: Manages and controls revision activities; revising agents report to the revision supervisor;
- Special ballot coordinator: Is responsible for managing the special voting rules process in the office of the returning officer.

2.8 Key Points from this Chapter

- Revising agents update the *Preliminary List of Electors* by adding, correcting or removing elector information.
- The Appointment and Oath (for election or referendum officers) (EC 10130) form establishes your authority and acts as a payment form. Make sure it is accurate, and keep it with you while you are working.
- Apply a customer service mindset. Treat electors and other election personnel with courtesy and respect.
- Know the calendar dates of the revision period and the location(s) where you will be working.
- Positions that support revision include revising agents, revision centre clerks, revision supervisors, automation coordinators, assistant returning officers, returning officers and special ballot coordinators.

2.9 Chapter Checkpoint

To test yourself on the content in this chapter, answer the following multiple-choice questions. (The answers are provided in the <u>Answer Key</u> near the back of this manual.)

- 1. What do revising agents update when they conduct revision activities?
 - a) The Preliminary List of Electors
 - b) The National Register of Electors
 - c) The Poll Key Report
 - d) The GEO list
- 2. What is the Appointment and Oath (for election or referendum officers) (EC 10130) form?
 - a) A legal document that establishes the authority of the revising agent to do his work
 - b) The form the revision supervisor uses to swear in revising agents
 - c) The form given to electors to complete if they want to vote in the election
 - d) All of the above
- 3. Revising agents should carry their *Appointment and Oath (for election or referendum officers)* (EC 10130) form with them when working.
 - a) True
 - b) False
- 4. The revision period ends on:
 - a) Day 24 at 5:00 p.m. when the Voter Information Cards have been mailed
 - b) Day 6 at 6:00 p.m.
 - c) Day 7 at 9:00 p.m.
 - d) When the returning officer declares revision to be over
- 5. Election personnel who support revision include:
 - a) Returning officers, poll clerks and revising agents
 - b) Revising agents, revision supervisors and deputy returning officers
 - c) Revising agents, revision supervisors, poll clerks and revision centre clerks
 - Assistant returning officers, returning officers, revision centre clerks, revision supervisors, revising agents, automation coordinators and special ballot coordinators

Chapter 3 – Elector Rights and Qualifications

Objectives

In this chapter, you will learn about:

- the electors' rights,
- the revising agent's role in maintaining confidentiality,
- the qualifications electors must meet to be eligible to vote,
- how to determine electors' residency status, and
- acceptable forms of identification and proof of address.

3.1 Elector Rights

Electors have the right to be treated with courtesy and respect by all Elections Canada personnel. You are responsible for upholding electors' rights when conducting revision activities.

Bilingual Service

Elections Canada is obligated by law to ensure that electors receive service in either of the official languages. In all cases:

- In person, greet the elector in both official languages: "Good morning/Bonjour."
- Over the telephone, greet the elector in both official languages: "Elections Canada [your electoral district] Bonjour."

If you are unable to provide service in French, say: "Un moment, s'il-vous-plaît" and:

- ask if there is someone in the office who can assist you, or
- the revision supervisor or returning officer will arrange for service.



If the elector does not speak French or English and you are therefore unable to complete the transaction, contact your revision supervisor or the returning officer.

Smoke-free Environment

Revising agents, though they may work in a variety of locations, are responsible for providing a smoke-free environment for electors at all times.

Electors Who Require Special Assistance

Elections Canada supports respectful assistance to electors with a disability, electors who are senior citizens, electors who are unable to read, and any other elector who requires special assistance.

You should offer these types of respectful assistance to electors who may benefit from help:

- If a person appears to require assistance in understanding the process, ask the person if he requires assistance. If the person agrees to assistance, ask what kind of assistance he needs.
- Always speak directly to the elector, rather than to his companion. You should give your undivided attention to assisting an elector with a disability.
- Each elector is an individual who may require different levels of assistance. It may take more time for an elector with a disability or an elderly person to communicate.
- Speak calmly, slowly and directly to a person who is deaf or hard of hearing. Your natural facial expressions, gestures and body movements will help the person understand. If communicating with this person remains difficult, try writing down your instructions. Do not shout or speak in the person's ear.
- Greet a person who has a visual impairment by saying who you are and what you do. Explain the process to the elector. If this person has to sign a form, provide a guiding device, such as a ruler or card, to help the person place his signature. You must ensure that the elector fully understands what he is signing.
- If an elector requires assistance to walk, offer your arm and warn him of any steps or obstacles he may encounter.



Service dogs that assist an elector with seeing or for another disability **must be admitted** to any building. The dog must not be disturbed while carrying out its duties.

Confidentiality of Information

Elector information is confidential and is protected through legislation. It can be used solely for the purposes of an electoral event.

Forms signed by electors contain the following paragraph:

"The personal information you provide is used for federal and provincial electoral purposes only. It is protected under the *Canada Elections Act* and the *Privacy Act*. The information is retained in Personal Information Banks CEO PPU 005 and CEO PPU 037."

This tells the elector that any personal information he has provided will not be communicated to other government agencies or other types of organizations, private or public, except for electoral purposes (information can be communicated to provincial elections agencies to update their lists). The data banks mentioned are the National Register of Electors and the *Preliminary Lists of Electors*.

Follow these guidelines:

- Keep all lists and completed forms out of public view.
- Do not share elector information with other electors, family or friends.
- Do not search for any elector for a purpose that is not related to revision, including out of curiosity.
- When you are trying to determine who is or is not registered at the address of an elector, do not share names of people who may be registered at that address.
- Secure revision documents in locked cabinets or offices when they are not being processed.
- Secure all revision documents at the end of the day as directed by the revision supervisor.
- Secure photocopied identification documents at all times. Identification documents containing personal information are not to be disposed of by the elector or electoral personnel but must be included to lot 11 (shredding) at the end of the event.

3.2 Elector Qualifications

Electors may vote if they are:

- at least 18 years old on polling day,
- a Canadian citizen, and
- ordinarily resident in the electoral district in which they wish to vote.

Age

A person must be at least 18 years of age on polling day to vote. You may register someone who is not currently 18, provided that he will be 18 years of age on or before polling day.

Citizenship

A person must already be a Canadian citizen to register to vote. A person who is in the process of becoming a citizen may not register to vote, even if the date on which he will officially become a Canadian citizen will precede or coincide with polling day.

Place of Residence

A qualified elector must be registered on the list of electors for the electoral district where he is "ordinarily resident." This is the district in which he must vote.

Defining "ordinarily resident"

A person is "ordinarily resident" at the place he calls home: this is the place where he resides and intends to return to when away. A person can be ordinarily resident in only one place at a time.

Residence at a by-election

To be qualified to vote, an elector must reside in the electoral district on the first day of the revision period, and he must continue to reside there until polling day. This means that:

- an elector who has moved from another electoral district to yours after the first day of the revision period is not entitled to vote at the by-election, even if he is still residing in the electoral district on polling day,
- an elector who has moved from one polling division to another within your electoral district since the start of revision is entitled to vote, and
- an elector who is planning to move out of the electoral district **before polling day** is **not** entitled to vote.

To confirm the elector's period of residency, ask him on what date he moved to that address and if he intends to stay there until after polling day.

- If the date when he moved into the electoral district precedes or corresponds to the first day of revision, and if he confirms that he intends to remain at that address until polling day, proceed with registering or transferring the elector.
- If the date when he moved follows the first day of revision, and if his previous address was not in the electoral district, inform the elector that he cannot vote in this by-election and that his information cannot be updated at this time.

1. Seasonal Residents

A person is not ordinarily resident in a secondary residence, such as a cottage which is generally used during part of the year, unless the person staying there has no other place that he considers to be his residence.

2. Electors Who Are Temporarily Absent from Home

During a period of temporary absence from home, an elector may not register in the polling division where he is staying temporarily. He must vote in the polling division of his place of ordinary residence.

3. Electors Who Do Not Have a Permanent Residence

When a person has no permanent residence or dwelling, the person's temporary quarters at registration time are considered to be the place where the person is ordinarily resident.

Temporary quarters include soup kitchens, shelters, hostels and other similar facilities that provide food, lodging or other social services.

4. Canadian Forces Electors

A member of the Canadian Forces normally votes under a separate procedure set out in the Special Voting Rules. However, if at the time of an electoral event the Canadian Forces elector is actually living in the electoral district indicated on his *Statement of Ordinary Residence* that is filed with the Department of National Defence, the elector has the right to be registered at the address where he is living. The elector can vote as a civilian elector, provided that he has not already voted by special ballot.

5. Spouse or Dependant of a Canadian Forces Elector in Canada

Spouses and dependants of Canadian Forces electors living in Canada must vote as civilians if they are qualified. They must be registered at their Canadian address if that is their place of ordinary residence.

6. Student Away from Home

A student's residence can be considered a place of ordinary residence if the student does not intend to return to his previous home. However, students who

leave their place of ordinary residence for the duration of their studies and do intend to return are eligible to vote only in the electoral district of their place of ordinary residence.

7. Persons Under Tutorship or Curatorship

Under the *Canada Elections Act*, every person has the right to vote as long as he is able to acknowledge that he is 18 years of age, is a Canadian citizen, ordinarily resides in the electoral district, and can provide satisfactory proof of identification. **During an event**, an elector **cannot** be removed from the list of electors because he is under the tutorship or curatorship of another person.

However, between events, anyone who has tutorship or curatorship over another individual (including civil rights by a court of law) can request that the name of the individual for whom he has tutorship or curatorship be deleted from the National Register of Electors (NRoE) by contacting Elections Canada to obtain the *Request to Opt Out* form. This application must be accompanied by a copy of the legal document giving him tutorship or curatorship, along with copies to establish the identity of the person making the request.



According to the *Canada Elections Act,* an elector suffering from mental illness or a degenerative disease has the right to vote. The request for removal from the list of electors must come from the individual.

3.3 **Proof of Identity and Address**

A returning officer may approve a registration or revision request only if the elector has been properly identified. You are responsible for ensuring that the elector provides acceptable proof of identification and address.

Always begin by asking for the elector's name, current and/or previous address and date of birth.

- If the elector's name, current or previous address and date of birth **are on** the *Preliminary List of Electors* or the National Register of Electors, this is considered sufficient proof of identity and no document needs to be presented. This is why an elector's identity may be established over the telephone.
- If the elector's name is not on the Preliminary List of Electors or on the National Register of Electors, he must provide satisfactory documentation for proof of identity and address.

It is important that you confirm the acceptability of identity documents. However, it is also important that eligible electors do not lose the right to vote.

Date of Birth

- The date of birth information is a requirement for a name to appear on the National Register of Electors. If a date of birth is not provided, the elector will be added to the list of electors for the current election but will not be added to the National Register of Electors.
- Dates of birth are used in the National Register of Electors to distinguish between electors who have the same name.
- Dates of birth will not appear on the lists of electors prepared for candidates, members of Parliament or political parties.
- Dates of birth will be matched with the same information that the elector has already provided to other agencies (such as provincial or territorial departments issuing driver's licences) so that electors can be automatically registered at their new residences without the inconvenience of having to re-register every time they move.

Satisfactory Documentation

Any one of the following four identification options can provide the necessary information to prove identity and address:

 one document showing the name, current address of ordinary residence and signature of the elector (see the <u>Examples of Acceptable Documents</u> table, below);

OR

- 2. two documents:
 - one showing the name and current address of ordinary residence of the elector (see the <u>Examples of Acceptable Documents</u> table), and
 - one showing the name and signature of the elector (see the <u>Examples of</u> <u>Acceptable Documents</u> table);

OR

 an affidavit signed before a person authorized to receive oaths in the province or territory and showing the name, current address of ordinary residence and signature of the elector;

OR

4. when the elector cannot provide any of these documents, a document showing the **name** and **current address of ordinary residence** of the elector's spouse or of the person on whom the elector is dependent. Both the elector to be registered and the person whose name appears on this document must be present at the time it is offered, and they must reside at the same address.

Documents with name, current address and signature	OR	Documents with name and current address	AND	Documents with name and signature
 Driver's licence Mortgage or land transfer document A completed and signed personalized processed cheque for payment of an account Vehicle registration (some provinces) Attestation of Residence (EC 50053) 		 Statement of account from telephone, public utilities or credit cards from major commercial undertakings Automobile insurance policy certificate Income tax notice of assessment Hospital card Proof of subscription to a magazine or periodical, or a magazine with a mailing label affixed Statement of RRSP or mutual fund 		 Health insurance card Canadian passport Canadian citizenship card Old age security card Social Insurance Number card Automated teller machine card Credit card Automobile club card Library card Student card Certificate of Indian Status card

 Table 1
 Examples of Acceptable Documents



Once you have examined the documents and have verified identity and residency, return the documents to the elector.

Electors applying by mail must send photocopies of identification and address documents.

Attestation of Residence (EC 50053)

Certain electors may have difficulty in providing proof of identity and address to register and to vote. For that reason, the Chief Electoral Officer has authorized the use of the *Attestation of Residence* (EC 50053).

Printed copies of this electronic document may be signed by the administrator of a shelter, soup kitchen, student or senior residence, long-term care facility or Aboriginal reserve and be used by the elector as proof of address for registration and voting purposes.



The elector must provide a second piece of identification along with the *Attestation of Residence* (EC 50053).

The List of Signatures – Attestation of Residence document (EC 50054) is another electronic form. Printed copies must be signed by administrators of concerned institutions. A copy of this form will be given to each concerned electoral officer and

should validate the *Attestation of Residence* (EC 50053) used by the elector to register or to vote.

3.4 Acting in the Best Interests of the Elector

The way in which you respond to an elector's request depends on several factors. The most important is the elector's status on the *Preliminary Lists of Electors*. In responding, you should always try to meet the standard of the best interests of the elector, keeping in mind what your duties are under the *Canada Elections Act*.

This means that:

- the elector should be confident that the process for adding his name to the list of electors is easy and straightforward,
- the elector should be offered every available option to take part in the electoral process,
- you must inform the elector where and when to register on polling day, if he has been offered all options and is unwilling to take any of the steps required to revise his elector record,
- you must take **all** revision requests, despite your personal judgment of the validity of the requests, and
- **no one** except the returning officer or the assistant returning officer can make a decision about the validity of a revision request.



If you have any doubts about the validity of identification documents an elector presents, report the situation to your revision supervisor.

3.5 Key Points from this Chapter

- Electors have rights that must be respected.
- Revising agents must ensure that elector information remains confidential.
- Electors must be at least 18 years old on polling day, Canadian citizens, and ordinarily resident in the electoral district where they wish to register.
- To be added to the National Register of Electors, electors must provide a complete date of birth. If an elector does not, explain to him that he will be registered to vote during the current event, but his name will not be added to the National Register of Electors.
- Electors must provide satisfactory proof of identity and address to register.
- Compare the elector's signature with documents provided. If you notice a discrepancy, ask the elector for an explanation.
- Electors who are on the *Preliminary List of Electors* are not required to provide identification.

3.6 Chapter Checkpoint

To test yourself on the content in this chapter, answer the following multiple-choice questions. (The answers are provided in the <u>Answer Key</u> near the back of this manual.)

- 1. The first step the revising agent should take when he does not speak the elector's choice of official language is to:
 - a) Send the elector to another returning office
 - b) Immediately contact the revision supervisor or returning officer
 - c) Ask if there is someone in the office who can assist
 - d) Ask the elector to come back later
- 2. To maintain the confidentiality of elector records, revising agents should:
 - a) Keep lists and completed forms out of public view
 - b) Not share the names of electors who have previously lived at the address of the elector the revising agent is serving
 - c) Secure revision documents in locked cabinets
 - d) All of the above
- 3. "Ordinarily resident" means:
 - a) The elector has a choice about where he can register to vote
 - b) Electors living in shelters or hostels cannot register to vote
 - c) Canadian Forces electors cannot vote in their electoral district
 - d) The person calls that place home and returns there after being away
- 4. A signed void personalized cheque with a utility (such as hydro) bill are acceptable proof of identification and address.
 - a) True
 - b) False
- 5. When the elector's name is on the Preliminary List of Electors, he:
 - a) Needs to provide only proof of address
 - b) Does not need to provide proof of identity or address
 - c) Needs to provide only identification that shows his name, address and signature
 - d) Should contact the revising agent to make sure he can vote

Chapter 4 – Introduction to Revision

Objectives

In this chapter, you will learn about:

- the difference between revision and targeted revision,
- · how and when revision is triggered, and
- how electors make contact with revising agents.

4.1 What is Revision?

Revision is a period of approximately four weeks during which revising agents respond to electors' requests to have their names added to, corrected on, or deleted from the *Preliminary List of Electors*.

4.2 What is Targeted Revision?

Targeted revision is an outreach initiative aimed at extending service to sectors of the electorate who are at risk of not being on the *Preliminary List of Electors*. Elections Canada offers them a variety of methods for registration.

Targeted revision is directed at electors living in:

- new residential developments,
- areas where people move frequently, and
- institutions, nursing homes and chronic care facilities.

Through targeted revision, the returning officer ensures that electors in these high mobility areas are offered the opportunity to register or make requests for revision.

4.3 How Do Electors Communicate with Revising Agents?

There are three ways that electors make contact with revising agents:

- in person,
- over the phone, or
- by mail.

4.4 How is the Public Informed of the Beginning of an Event?

Elections Canada informs electors of an electoral event in four ways:

- Voter Information Cards
- Advertising

- Reminder cards
- Targeted revision

4.5 How Long Does Revision Last?

The revision period usually lasts 28 days, ending on Day 6 at 6:00 p.m.

4.6 The Revision Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
36	35	34	33	32	31	30
			Revision starts			
29	28	27	26	25	24	23
			Cards are	mailed to el	ectors	
	Target	rgeted revision in newly developed and high mobility areas				
		(Time may be extended based on requirements)				
22	21	20	19	18	17	16
		Targeted revision in institutions				
15 Reviewd Liet	14	13	12	11	10	9
Revised List of Electors printed					Advano	ce polls
8	7	6	5	4	3	2
	Advance polls	Revision ends	Official List of Electors printed			
1	0	-1	-2	-3	-4	-5
	Polling day					

Always tell electors that all forms and satisfactory identification must arrive at the office of the returning officer before the end of the revision period. Provide the calendar date for clarity.

4.7 When the Applicant Is Not the Elector

Sometimes the person making the request is doing so on behalf of someone else. Whatever the circumstances, a specific section of the form needs to be filled out, and certain requirements may have to be met. Whether or not the applicant needs to show identification for himself, he has to provide identification for the person he is applying for if registration is needed (note that this does not apply in the case of door-to-door targeted revision).

lf	and	Then	
The applicant is listed on the PLE	He is registered at the same address as the elector	 No identification required for applicant. No authorization required. 	
	He is not registered at the same address as the elector	 No identification required for the applicant. Ask the applicant for a letter of authorization signed by the elector. Complete. Ask identification for the elector if this is a registration. Enter applicant's information in section 6 (EC 40110) or section 7 (EC 40111) of the form. In the same section of the form, tick the "Letter of authorization provided by elector(s) requesting" box. 	
The applicant is not listed on the PLE	He wants someone registered or moved	 Ask the applicant for identification. Ask the applicant for a letter of authorization signed by the elector. Complete transaction and print the form (if not automatically printed). Ask identification for the elector, if this is a registration. Enter applicant's information in section 6 (EC 40110) or section 7 (EC 40111) of the printed form. In the same section of the printed form, tick the "Letter of authorization provided by elector(s) requesting" and "Identification of applicant provided" boxes. 	
	He has received a VIC for an elector who no longer lives at his address	 Ask the applicant for identification. Complete transaction. Enter applicant's information in section 7 (EC 40111) of the form. In the same section of the form, tick the "Identification of applicant provided" box. 	

Exception: Removal of a Deceased Elector

In the case of a deceased elector, the proof of death replaces the letter of authorization.

lf	Then
The applicant is not registered at the same address as the deceased elector	Ask the applicant for a proof of death.
The applicant is registered at the same address as the deceased elector	No proof of death is required.

4.8 Avoiding Duplication

Frequently, a search will indicate that there is more than one person with the same name on the list of electors. To choose the correct record to work with or to ensure that you do not duplicate an existing record, confirm the elector's identity with his date of birth. If the elector is reluctant to provide this information, explain that the date of birth:

- allows you to distinguish between electors who have the same name and keeps you from creating duplicate records,
- allows you to proceed with the transaction (transfer, move, correction) without asking to see proof of identity,
- will not appear on the lists of electors prepared for candidates, members of Parliament or political parties, and
- is matched with the same information that the elector has already provided to other agencies (such as provincial or territorial departments issuing driver's licences). This allows electors to automatically be registered at their new residences without the inconvenience of having to re-register every time they move.

4.9 Key Points from this Chapter

- Revision allows electors to add their names to, correct, or delete their names from the *Preliminary List of Electors*.
- Targeted revision involves making contact with electors in new residential developments, areas of high mobility, institutions, nursing homes or chronic care facilities.
- Elections Canada uses *Voter Information Cards*, reminder cards, advertising, and targeted revision to encourage electors to make sure their information on the *Preliminary List of Electors* is accurate.
- Revision usually lasts 28 days.
- Revision can take place in person, over the phone or by mail.

4.10 Chapter Checkpoint

To test yourself on the content in this chapter, answer the following multiple-choice questions. (The answers are provided in the <u>Answer Key</u> near the back of this manual.)

- 1. Revision is:
 - a) Adding electors to the Preliminary List of Electors
 - b) Deleting electors from the Preliminary List of Electors
 - c) Correcting elector information on the Preliminary List of Electors
 - d) All of the above
- 2. Targeted revision takes place only in new residential areas.
 - a) True
 - b) False
- 3. *Voter Information Cards* are sent to every registered elector at the address listed on the *Preliminary List of Electors*. The personalized card includes:
 - a) Information for electors about where to vote on polling day and confirmation of elector registration or revision
 - b) Information about candidates
 - c) Information about voting in another electoral district
 - d) Information on how to register other family members
- 4. Revising agents make contact with electors:
 - a) By phone and fax
 - b) By electronic mail
 - c) In person, over the phone and by mail
 - d) By email and in person

Chapter 5 – Completing Revision Tasks Using Forms

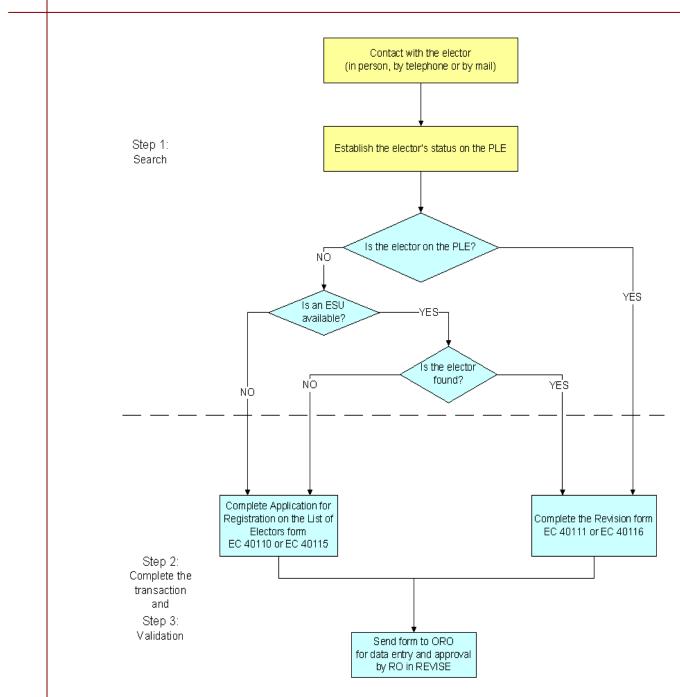
Objectives

In this chapter, you will learn about the steps for completing revision tasks using forms.

5.1 Introduction to Revision Using Forms

The status of the elector on the *Preliminary List of Electors* drives revision activities using forms. You will always begin by conducting a search to determine whether the elector is registered.

The information you write on the forms will be entered into the computer by someone other than yourself, so it is very important that you fill in the form completely, correctly and clearly so as to minimize the risk of errors.





5.2 Tools for Completing Revision Tasks Using Forms

The following tools are used to complete revision tasks using forms:

- A Manual for Revising Agents Using Forms (EC 40233),
- Geographical List of Electors (GEO list),
- Alphabetical List of Electors (ALPHA list),
- Transaction Log (EC 40091),
- Revision and registration forms, and
- Elector Search Utility (ESU).



Refer to Chapter 8 for a description of each tool and its use.

5.3 Completing Revision Using Forms

Revision using forms takes place primarily outside the returning office: for example, at a revisal site or while the revising agents are going door to door during targeted revision. It also may take place in the returning office when the computers are not available or there is a line-up. All information is written on paper forms.

The three steps to revision are:

- Step 1: Conduct the Search
- Step 2: Complete the Transaction
- Step 3: Validate the Transaction



These three steps must be completed whether the elector applies in person, applies over the telephone, or has completed a form and has mailed it to the office.

Completing Revision Tasks Using Forms

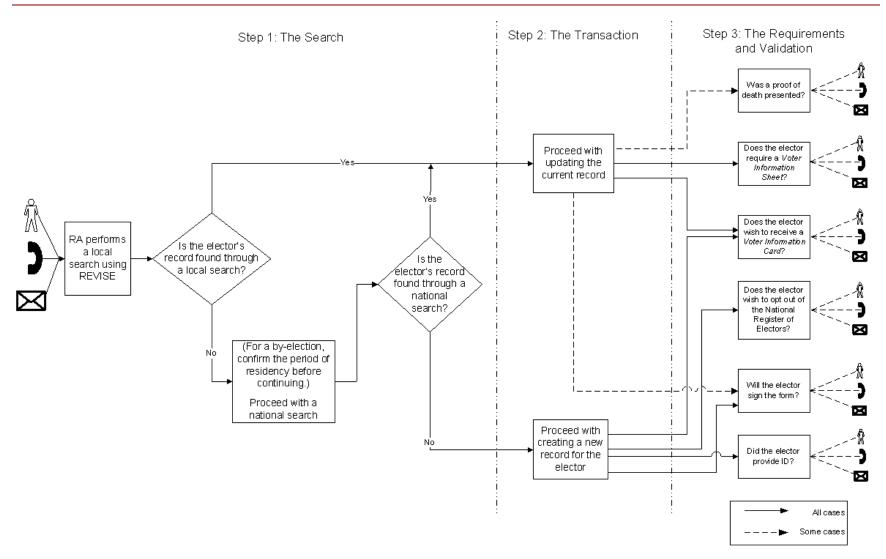


Figure 2Revising Agents and the Revision Process

Step 1: Conduct the Search

A search determines if the elector is already on the list, and avoids creation of a duplicate record. You will conduct one or two searches:

- local, using the Geographical List of Electors (GEO list). The GEO list allows you
 to quickly establish whether the elector is registered at his current or previous
 address,
- national, using the Elector Search Utility (ESU) (if available). The ESU allows you to look for the elector's name on the National Register of Electors.

Always conduct a local search first.

To conduct a search, ask the elector for his:

- name,
- date of birth, and
- current and previous addresses (always start with the current address).

If you are using the ESU, conduct the search using last name and first name only. Use the date of birth to confirm which record is the correct one in the search result screen.

Local Search (GEO List)

lf	Then
The elector is listed on the GEO list	Complete an <i>Application for Revision</i> (EC 40111 or EC 40116) (see <u>Figure 4</u>). Proceed to step 2.
The elector is not listed on the GEO list and the ESU is available	(For a by-election, confirm the period of residency before continuing.) Proceed with a search in the ESU.
The elector is not listed on the GEO list and the ESU is not available	Complete an <i>Application for Registration on</i> <i>the List of Electors</i> (EC 40110 or EC 40115) (see <i>Figure 3</i>). Proceed to step 2.

National Search (ESU)

lf	Then
The elector is listed in the ESU	Complete an <i>Application for Revision</i> (EC 40111 or EC 40116) (see <u>Figure 4</u>). Proceed to step 2.
The elector is not listed in the ESU	Complete an <i>Application for Registration on the List of Electors</i> (EC 40110 or EC 40115) (see <i>Figure 3</i>). Proceed to step 2.

Step 2: Complete the Transaction

Depending on the results of your search, you will complete either:

- an
- Application for Registration on the List of Electors (EC 40110 or EC 40115), or
- an Application for Revision (EC 40111 or EC 40116)
- Application for Registration on the List of Electors (EC 40110 or EC 40115)

(See Figure 3, Application for Registration on the List of Electors.)

Section 1: Electors requesting registration

- 1. For each elector, record:
 - full name,
 - gender, and
 - date of birth.
- 2. Tick the Voter Information Card (VIC) box for each elector.
- 3. Tick the ID box once satisfactory identification has been shown for each elector.



You do not need to keep the photocopies of the identification or make additional photocopies of the identification for the elector's record.

- 4. If the elector is reluctant to provide his date of birth, explain that this information will help avoid the creation of a duplicate record and will ensure that the right person is found on the list of electors when an existing record is revised.
- 5. If an elector chooses not to provide his date of birth, inform him that he may vote in the current election, but he will have to register again in the next election, since his name will not be added to the National Register of Electors.
- 6. **Do not** tick the "Tick here and sign..." box or ask for signature, **unless** the elector does not want his name added to the National Register of Electors. An elector may sign only for himself; he may not make this decision on behalf of someone else.

You must register all electors who qualify to vote, whether or not they provide a date of birth.

Section 2: Current address of ordinary residence for electors listed in section 1

- 1. Record the current home address and telephone number of the electors.
- 2. Use the poll key to determine the polling division for the address given. Record it in the box marked "PD".

Section 3: Mailing address (if your mail is delivered to another address, such as a post office box or a rural route)

Ask if the elector's mail is delivered to the address provided in section 2.

lf	Then
Yes	Leave this section blank.
No	Record the mailing address.

Section 4: Previous home address for electors listed in section 1

If the elector has recently moved, record his previous address here.

Section 5: Previous residents

Ask the elector, "Are the electors listed on the form the only electors living at this address?"

lf	Then
Yes	Tick the Yes box.
No	Tick the No box.
The elector does not understand the question	Do not tick either box.

Section 6: Identification of person making the application, if not listed in section 1

lf	Then
The applicant is not registered at the same address as the electors appearing on the	 Record the applicant's name, address and telephone number.
form	 The applicant must provide a letter of authorization signed by the persons on whose behalf he is making the application. Tick the "Letter(s) of authorization provided" box to indicate that these have been provided.
	 The applicant must establish his identity. (Refer to <u>Chapter 4 – Introduction to</u> <u>Revision</u>.) Tick the "Identification of applicant provided" box.

Section 7: Declaration

lf	Then
The elector is present	Ask the applicant to sign and date the form.
The elector is on the telephone	Arrange for the applicant to come in to sign the pre-filled form, or Offer to mail the form to him. If he chooses that option, ask the applicant to sign the form, attach any documents required to complete the transaction, and return the form to the returning office by the last day of revision.



The elector's or applicant's signature makes him responsible for the accuracy of all elector information on the form.

Section 8: Authorizations

After the form has been completed and signed by the elector or the applicant, proceed to <u>Step 3: Validate the Transaction</u>.



If you have any reason to doubt the validity of the information you have taken, discuss it with your revision supervisor or returning officer before signing the form.

Do not sign a form that is missing information or that must be sent to the elector. Once the form is returned, or when the elector is present, the revising agent who completes the transaction will also sign and date the form.

Ele		ication for Registration		ED #:		
Lie	(S	See sections 93, 97, 101, 44, 47 of	the Canada Elections Act)	L		Français au verse
1. 2.	ntitlement to vote: . Canadian citizen . 18 years of age by polling day . Ordinarily resident in the electoral distr	rict	All applicants must prov 1. Name 2. Address 3. Signature	ide one or two de	ocuments sh	nowing
1	Electors requesting registration	ion				
	Family name	Given name	Middle name	Gende	Date Date	of birth nth Year
1						
	Tick here and sign if you DO NOT wa name added to the National Register	of Electors				
2	Tick here and sign if you DO NOT want and a sign if you DO NOT was name added to the National Register	of Electors				
-	hane dated to the hallong hegister					VIC
3	Tick here and sign if you DO NOT wan and added to the National Register	ant your		F		di 🗌
-	name added to the National Register	of Electors				VIC
4				F		ai
	Tick here and sign if you DO NOT was name added to the National Register	of Electors				
2 PD	Current address of ordinary r	residence for electors list	ed in section 1		Ара	artment/Unit
				0	- Dec	tal code
Gity, ti	town, village or municipality			Province or terr	tory Pos	ital Code
	e telephone (optional) Mailing address (if your mail is	Business telephone (optional)	ss, such as a post office b	oox or rural rou	ıte)	
3 City, to	Mailing address (if your mail is own, village or municipality	a delivered to another addre		Province or terr		tal code
3 City, to	Mailing address (if your mail is own, village or municipality Previous home address for e	a delivered to another addre			tory Pos	tal code ED/PD
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3 City, to 4 Electo Numb	Mailing address (if your mail is own, village or municipality Previous home address for e	s delivered to another addre	Elector	Province or terri	tory Pos	
3 City, tr Electo Numb	Mailing address (if your mail is own, village or municipality Previous home address for e or er, street, apartment or unit own, village or municipality	e delivered to another addre	Elector Number, street, apartment or unit	Province or terri	tory Pos	ED/PD
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3 City, to Electo Numb City, to 5 The the 6 Name Addree City, to 7 T F C C 1, a 1	Mailing address (if your mail is own, village or municipality Previous home address for e a er, street, apartment or unit own, village or municipality Previous residents e electors listed in section 1 are the address listed in section 2. Yes No Identification of person maki ses own, village or municipality Declaration The personal information is retair 2EO PPU 005 and CEO PPU 037. the undersigned, declare that myn el certify that all the above perso	e is used for federal and province or territory e is used for federal and provinte Canada Elections Act and the Canada Elections Act and the canada and provinte of in Personal Information Ba name appears in either section	Elector Number, street, apartment or unit City, town, village or municipality City, town, village or m	Province or terr	tory Positive Positiv	ED/PD Province or territory r on the at at Address form s) of authorization d by elector(s) ting a registration cation of applicant ed

Figure 3 Application for Registration on the List of Electors

Application for Revision (EC 40111 or EC 40116)

(See Figure 4, Application for Revision)

Section 1: Type of application

Confirm the type of revision required.

lf	Then
The elector was found in the ESU, it's a transfer.	 Tick the "Transfer from another electoral district" box. Confirm that he is ordinarily resident within the electoral district. Tick the box. (For a by-election, confirm the period of
	residency before continuing.)
The elector was found at his previous address on the GEO list, it's a move.	Tick the "Move within the electoral district" box.
The elector wants his or another name removed from the list, and he was found on the GEO list at his current address, it's a removal.	 Tick the "Removal" box. Tick the box that explains the reason for the removal.
The elector was found at his current address on the GEO list and the information is incorrect, it's a correction.	 Tick the "Correction" box. Tick the box that explains the reason for the correction.

Section 2: Electors requiring revision

- 1. For each elector, record:
 - sequence number (if the elector was listed on the GEO list),
 - full name,
 - gender, and
 - date of birth.
- 2. Tick the VIC box for each elector who has met the requirements.
- 3. Tick the ID box since the elector's identification on the list has already been established.

lf	Then
The elector is present in person or on the telephone and you are unable to match the identity of at least one of the electors being applied for.	Explain that in order to complete the revision, this elector must show identification or send a photocopy of appropriate identification documents by mail or fax.

Section 3: Current address of ordinary residence for electors listed in section 2

- 1. Record the elector's current home address and telephone number.
- 2. Use the poll key to determine the polling division for the address given. Record it in the PD box.

Section 4: Mailing Address (if your mail is delivered to another address, such as a post office box or a rural route)

Ask if the elector's mail is delivered to the address provided in section 3.

lf	Then
Yes	Leave this section blank.
No	Record the mailing address.

Section 5: Previous home address for electors in section 2 requiring revision

lf	Then
You are completing a transfer or a move	 Write the elector's previous electoral district and home address on the form. Do not mark the section in grey.

Section 6: Previous residents (for a transfer or a move)

Ask the applicant, "Are the electors listed on the form the only electors living at this address?"

If	Then
Yes	Tick the Yes box.
No	Tick the No box.
The elector does not understand the question	Do not tick either box.

Section 7: Identification of person making the application, if not listed in section 2

lf	Then
The applicant is not registered at the same address	 Record the applicant's name, address and telephone number.
	2. The applicant must provide appropriate documentation and proof of identity. (See <u>section 4.7, When the Applicant Is Not the Elector</u> .)
	 Tick the "Letter(s) of authorization provided" box to indicate that these have been provided.
	 Tick the "Identification of applicant provided" box.

Section 8: Declaration

The signature of the elector is required only under certain circumstances.

lf	Then
Transfer	Signature of the elector is required.
Correction: legal change of name	 Signature of the elector is required. Print previous name in the space provided.
Correction of errors in the name, address, date of birth, gender, etc.	No signature is required.
Move	No signature is required.
Removal of an elector where the applicant is not on the PLE at the same address as the removed elector	Signature of applicant is required.
Removal of an elector where the applicant is on the PLE at the same address as the removed elector	No signature is required.



The elector's or applicant's signature makes him responsible for the accuracy of all elector information on the form. Be sure to compare the elector's signature against the identity documents provided.

lf	Then
The elector is present	Ask the elector to sign and date the form if required (see above).
The elector is on the telephone	Arrange for the elector to come in to sign the pre-filled form,
	or Offer to mail the form to him. If he chooses that option, ask the elector to sign the form, attach any documents required to complete the transaction, and return the form to the returning office by the last day of revision if required (see above).

Section 9: Authorizations

After the form has been completed and signed by the applicant, proceed to <u>Step 3: Validate the Transaction</u>.



If you have any reason to doubt the validity of the information you have taken, discuss it with your revision supervisor or returning officer before signing the form. Do not sign a form that is missing information or that must be sent to the elector. Once the form is returned, or if the elector is present, the revising agent who completes the transaction will also sign and date the form.

		Application for	Revision	1	ED *				
Elections	Canada (See sections 93, 97, 99, 101, 44, 47			ED #:				
								Franç	ais au ve
11 1962	f application		_				1		
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Figure 4 Application for Revision

Step 3: Validate the Transaction

The purpose of Step 3 is to check that an elector has met the requirements for a specific transaction after you have completed the correct form.

You will:

- Ask yourself five questions,
- Answer Yes or No to the questions that apply to the transaction, and
- Confirm that the correct requirements have been met for the transaction.

Validation Questions

- 1. Did the elector sign the form, if that was required?
- 2. Did the elector provide ID, if that was required?
- 3. Did the elector need to have a VIC mailed to him?
- 4. Did the elector opt out of the NRoE, if that was an option?
- 5. Did the applicant present proper documentation (proof of death or letter of authorization), if that was required?

lf	Then
All the requirements have been met.	 Sign the form. Have your partner check and sign the form. Thank the elector.
One or more requirements have not been met.	 Explain that the transaction cannot be completed until documentation and/or signatures are provided.
	Offer the elector the option of returning the form to the office by mail or coming in person to complete the process.2. Complete the <i>Transaction Log</i> (EC 40091).

5.4 Key Points from this Chapter

- Revision using forms involves completing all tasks using forms and lists.
- The *Geographical List of Electors* (GEO list) and Elector Search Utility (ESU) are used to conduct the search for an elector.
- Revision using forms involves conducting the search, registering or revising the elector, and validating the transaction.
- An application for revision may involve a transfer, move, removal or correction.

5.5 Chapter Checkpoint

To test yourself on the content in this chapter, answer the following multiple-choice questions. (The answers are provided in the <u>Answer Key</u> near the back of this manual.)

- 1. Only revising agents who work outside returning offices will complete revision tasks manually.
 - a) True
 - b) False
- 2. In order to register an elector or revise his information, you must:
 - a) Determine which form to use
 - b) Determine whether you have the information and documentation required to proceed
 - c) Complete the appropriate form
 - d) All of the above
- 3. You may complete an *Application for Revision* form (EC 40111 or EC 40116) when the applicant:
 - a) Is not on the GEO list or the ESU and wants to register
 - b) Is listed on the GEO list
 - c) Has a sworn affidavit that he qualifies as an elector
 - d) All of the above
- 4. Someone making an application for registration on behalf of another elector not living at the same address must provide a:
 - a) Letter of authorization signed by the person on whose behalf the application is being made
 - b) Credit card with his signature
 - c) Voter Information Card
 - d) All of the above

Chapter 6 – Follow-up Tasks

Objectives

In this chapter, you will learn about:

- how to complete the Transaction Log (EC 40091), and
- what to do at the end of your shift.

6.1 Complete Follow-up Tasks

The revision supervisor will designate a revising agent to check the *Transaction Log* (EC 40091) and will use the information on the log to ensure that follow-up is completed. The follow-up can be:

- Mailing or faxing forms that need to be sent to electors for completion the same day that the request is made;
- Calling electors whose form is pending because of missing information or documents;
- Checking the follow-up basket for forms that are pending.

Always remember that the revision period is short and any requests for registration or revision arriving after Day 6 at 6:00 p.m. cannot be processed. Forms that need action from the elector (signature, ID, etc.) should not remain in the follow-up basket more than a few days. After that, check in REVISE, and if the elector did not come back, contact him to remind him that he has a form waiting to be completed. Offer to mail it to him if he would find that more convenient.

6.2 Complete the *Transaction Log* (EC 40091)

Revising agents must complete the *Transaction Log* (EC 40091) for all elector requests needing follow-up.

To complete the Transaction Log (EC 40091) (see Figure 5, below):

- Enter the elector's name in column 1, date of birth in column 2, address in column 3, and telephone number in column 4.
- In column 5, briefly describe why the form is pending.
- In column 6, enter the action taken (if any).
- In column 7, write your initials.
- In column 8, enter the date you sent any material to the elector.

The *Transaction Log* (EC 40091) is a quality control measure that is used to ensure that the elector is offered every opportunity to register or to revise his information.

Elections	Canada			ction Log			EC 40091 Page
1	2	3	4	s transactions	6	7	8
Elector Name Nom de l'électeur	Date of Birth Date de naissance	Address Adresse	Telephone Téléphone	Description of the issue / inquiries Description du problème / demande	Action taken Mesure prise	RA AR	Date sent Date de l'envoi
John Roy	March 23, 1973	526 Willows, St. Albert, BC	521-1234	Elector will come to sign form		DN	
Jane Smith	Sept. 22, 1949	95 Beech Ave St. Albert, BC	523-4567	Elector requested form	Form mailed to Elector	NL	March 4, 2004
Mary Hubert	April 9, 1977	5830 Montcalm St. Albert, BC	534-6789	Elector will send ID		ТМ	March 5, 2004
Mike Mooney	June 1, 1970	2-10 Deer St. Albert, BC	567-9876	Elector requested a registration form by phone	Form sent	JL	March 8, 2004
Joseph White	December 2, 1950	364 River Road St. Albert, BC	543-7390	Letter of authorization needed. Elector will come		NL	
				Verified by the Revision Supe é par le superviseur de la révis		1	·

Figure 5 *Transaction Log*

6.3 At the End of Your Shift

Ensure that both you and your partner have reviewed each other's work and have signed the forms. Give these forms to your revision supervisor.

Check the follow-up basket for forms that are pending and mail or fax forms that need to be sent to electors for completion on the same day that the request is made.

6.4 Key Points from this Chapter

- The *Transaction Log* (EC 40091) is a quality control measure to make sure electors have every opportunity to register or to revise their information.
- It is very important that you and your partner verify each other's work and sign the forms.
- Ensure that forms requested by electors are mailed to them.

6.5 Chapter Checkpoint

To test yourself on the content in this chapter, answer the following multiple-choice questions. (The answers are provided in the <u>Answer Key</u> near the back of this manual.)

- 1. The information you record on the *Transaction Log* (EC 40091) is used to:
 - a) Follow up with the automation coordinator
 - b) Check batches of forms for errors
 - c) Ensure the elector has every opportunity to register or to revise his information
 - d) None of the above
- 2. The revision supervisor must sign revision forms before the returning officer reviews and signs the forms.
 - a) True
 - b) False
- 3. Mail or fax forms at the end of:
 - a) Each week
 - b) Each day
 - c) Each shift
 - d) Each hour

Chapter 7 – Answer Key

Chapter 1 – Introduction		
Question	Answer	
1	d	
2	b	
3	b	

Chapter 2 – About Revising Agents		
Question	Answer	
1	а	
2	а	
3	а	
4	b	
5	d	

Chapter 3 – Elector Rights and Qualifications		
Question	Answer	
1	С	
2	d	
3	d	
4	b	
5	b	

Chapter 4 – Introduction to Revision			
Question	Answer		
1	d		
2	b		
3	а		
4	С		

Chapter 5 – Completing Revision Tasks Using Forms		
Question	Answer	
1	b	
2	d	
3	b	
4	а	

Chapter 6 – Follow-up Tasks			
Question	Answer		
1	с		
2	b		
3	b		

Chapter 8 – Appendix

8.1 Frequently Asked Questions

1. How do I register a homeless elector?

Homeless electors can register by using an *Attestation of Residence* (EC 50053). The elector may already have one in hand, duly completed. If so, register the elector as usual. The *Attestation of Residence* is to be used as proof of address only; the elector must show separate proof of identification. If the elector does not have an *Attestation of Residence*, he may obtain one from a facility that provides services to the homeless, such as a soup kitchen or shelter.

2. How do I register an elector who is in danger (for example, an abused spouse)?

An elector who is in danger and does not want to reveal his location can vote with a special ballot. However, he must appear on the list of electors. You may direct this elector to the special ballot coordinator, who will explain to him how he can apply for a special ballot and keep his current address protected. The elector in danger can also vote on polling days (advance or ordinary), if he wishes. To keep his current address secret, he may register at his previous address, and vote in the corresponding polling division, provided that by doing so he does not put himself at risk.

3. In Quebec, there are still women advising us that they appear on the list under their maiden name. Is this an error we can correct over the telephone, or must the elector show ID or sign the revision form?

In Quebec, all women are registered under their maiden name. Under the federal law, however, they have the right to be registered under their married name if they wish. The change would be done and would be considered a legal change of name. The elector would have to sign the revision form.

4. Door-to-door targeted revision: Does the elector at the door need to show ID and proof of address? What do we do if no ID document is presented for absent electors?

Since the elector is found at home, proof of address and identity is not needed for the elector at the door or for any other elector at that address. The elector must take the prescribed oath to prove identity and address for all electors at that address, including himself, and sign the *Application for Registration – Targeted Revision at Elector's Residence* form (EC 40113 or EC 40118).

5. An applicant's spouse or parent died several years ago, and the applicant cannot find the death certificate.

First, determine if a proof of death is required, using the criteria in Chapter 5 in this manual. If one is needed, the returning officer can accept another type of document, such as the obituary.

6. An applicant and his spouse live at the same address. He tells me that he has to vote at one location and his spouse at another location. Why is this?

Inconsistencies like this, which are rare, tend to result from the last enumeration. If this occurs, review both elector records and update the one that is incorrect so that both spouses are registered in the same polling division and may vote at the same location.

7. Where did the data for the list come from?

The data comes from the National Register of Electors, which is a permanent database maintained at Elections Canada in Ottawa. This database is updated regularly from administrative sources such as the Canada Revenue Agency, driver's licence information, vital statistics and provincial and territorial electoral data.

8.2 Terms You Should Know

Term	Definition	
Address range	A street segment contained within a polling division. Its extremities are usually defined by the lowest and highest civic numbers in that segment. See "poll key," below.	
Advance polls	Special polls, open for three days, where an elector can vote before regular polling day. They are held on Days 10, 9 and 7 of the election calendar.	
Alphabetical List of Electors (ALPHA list)	A copy of the list of electors that is sorted alphabetically.	
Applicant	Person making a request for another elector.	
Automation coordinator	Provides technical support for all automated systems in the returning office.	
Civic address	The elector's physical address.	
Correction Certificate (EC 50051)	Form used at the polls to capture changes in elector information when the elector is already on the list of electors.	
EC form number	Inventory control number (for example, EC 40111) printed on the first page of official forms, books and other items to identify them.	
Elector	Any Canadian citizen who is at least 18 years of age on polling day.	

Term	Definition	
Electoral district	The basic geographical and administrative unit of the Canadian electoral system.	
Electoral event	A general election, by-election or referendum.	
Geographical List of Electors (GEO list)	A copy of the list of electors that is sorted first by name of municipality, then alphabetically by street name and addresses.	
National Register of Electors (NRoE)	A database of all electors in Canada that is kept at Elections Canada in Ottawa and maintained year-round through updates from various sources.	
Official List of Electors	A list of electors produced from the REVISE application that incorporates changes made to the list from the start of revision until the end of revision.	
Ordinarily resident	A person is ordinarily resident at the place he calls home. This is the place he intends to return to when away, or the place where he resides.	
Poll key	A list that is used to determine the polling division number associated with an address.	
Polling division	The basic geographical and administrative unit of the electoral district. There usually is one polling station for each polling division.	
Polling station	Established for every polling division in the electoral district. There is one ballot box for each polling station.	
Preliminary List of Electors (PLE)	A list of electors produced from the National Register of Electors when an election is called. The list is sent to each returning officer.	
Registration Certificate (EC 50050)	Form used at the polls to capture information about a qualified elector for registration purposes.	
Reminder card	A card sent to each address shortly after the <i>Voter Information</i> <i>Cards</i> have been distributed. It tells electors to check that they have received a <i>Voter Information Card</i> and, if not, to take appropriate action.	
Returning officer	Responsible for the administration of the electoral process within the electoral district.	
REVISE	Software used to complete revision tasks in the returning office.	
Revised List of Electors	A list of electors that incorporates changes made to the list from the start of revision until the advance voting days.	
Revising agent	Updates the <i>Preliminary List of Electors</i> by receiving applications for registration or revision from electors through the mail, by telephone or in person.	
Revision	A four-week period during which revising agents respond to electors' requests to have their names added to, corrected on, or deleted from the <i>Preliminary List of Electors</i> .	

Term	Definition	
Revision Centre	Computer centre in the office of the returning officer where electors come to have their records created or updated.	
Revision supervisor	Manages and controls revision activities. Revising agents report to the revision supervisor.	
Sequence number	A number assigned to every elector on the <i>Preliminary List of Electors</i> .	
Targeted revision	An activity directed at electors living in new residential developments, areas where people move frequently, institutions, nursing homes, and chronic care facilities. Targeted revision ensures that these electors are offered the opportunity to register of to make requests for revision.	
Unique identifier	An eight-digit, unique, randomly generated number assigned to each elector appearing on the <i>Preliminary List of Electors</i> .	
Voter Information Card (VIC)	A card mailed to every elector registered on the <i>Preliminary List of Electors</i> . It identifies the elector and tells him where to vote and how to contact the office of the returning officer.	

8.3 Tools

Tool	Description	Use
Alphabetical List of Electors (ALPHA list)	A copy of the list of electors that is sorted alphabetically.	Used to determine the status of the elector.
Application for Registration on the List of Electors (EC 40110, EC 40115)	Form used to capture information about a qualified elector for registration purposes.	Used to register electors.
Application for Registration – Targeted Revision (EC 40112 or EC 40117)	Form contained in the Your name may not be on the federal voters list brochure.	Left at households when revising agents conduct targeted revision.
Application for Registration – Targeted Revision at Elector's Residence (EC 40113 or EC 40118)	Form used during targeted revision to capture information about a qualified elector for registration purposes.	Used to register electors during door-to-door targeted revision.
Application for Revision (EC 40111, EC 40116)	Form used to capture changes in elector information when the elector is already on the list of electors.	Used by revising agents to update elector records (moves/corrections/deletions/legal name changes).

ΤοοΙ	Description	Use
Appointment and Oath (for election or referendum officers) (EC 10130)	A legal document used to appoint election officials.	Legally authorizes the appointed person to act in the capacity of an election official. The oath must be read and signed by both the returning officer or designate and the appointee.
Elector Search Utility (ESU)	Database of all registered electors in Canada	Used to establish electors' status on the list of electors when REVISE is unavailable.
Geographical List of Electors (GEO list)	A paper copy of the list of electors that is sorted first by name of municipality, then alphabetically by street name and addresses.	Used to determine the status of the elector.
National Register of Electors (NRoE)	A database of all electors in Canada that is kept at Elections Canada in Ottawa and maintained year-round through updates from various sources.	Used to search for electors who are not found on the <i>Preliminary List of Electors</i> (PLE).
Poll key	Address ranges sorted by polling divisions.	Used to determine the poll corresponding to an address.
A Manual for Revising Agents Using Forms (EC 40233)	Procedure manual for revising agents	Used to learn and apply the rules and regulations of the revision of electoral lists. This is your main source of information.
<i>Transaction Log</i> (EC 40091)	Form used with the follow- up basket.	Used to keep track of forms needing follow-up.
Voter Information Card (VIC)	A card sent to all electors registered on the preliminary list or given to electors who get registered during revision.	Confirms that an elector is registered to vote and provides important voting information.

Chapter 9 – Reference Material

Sections of Law Related to Accessibility

Canadian Human Rights Act

2."[...] all individuals should have an opportunity equal with other individuals to make for themselves the lives that they are able and wish to have and to have their needs accommodated....without being hindered in or prevented from doing so by discriminatory practices based on a prohibited ground."

3.(1) For all purposes of this Act, the prohibited grounds of discrimination are race, national or ethnic origin, colour, religion, age, sex, sexual orientation, marital status, family status, disability and conviction for which a pardon has been granted.

5. It is a discriminatory practice in the provision of goods, services, facilities or accommodation customarily available to the general public

(a) to deny, or to deny access to, any such good, service, facility or accommodation to any individual, or

(b) to differentiate adversely in relation to any individual, on a prohibited ground of discrimination.

7. It is a discriminatory practice, directly or indirectly,

(a) to refuse to employ or continue to employ any individual, or

(b) in the course of employment, to differentiate adversely in relation to an employee, on a prohibited ground of discrimination.

Canadian Charter of Rights and Freedoms

15.(1) It is not a discriminatory practice if

(a) any refusal, exclusion, expulsion, suspension, limitation, specification or preference in relation to any employment is established by an employer to be based on a *bona fide* occupational requirement;

James Peter Hughes v. Elections Canada – Summary

Rev. Hughes and his wife lived for many years in the United States. They moved back to Canada upon retirement. Rev. Hughes uses a wheelchair or walker. They live in a condo in downtown Toronto, near St. Basil's Church, the polling location used in the two electoral events at issue in the case. Mr. Hughes testified that the March 2008 by-election was his first time voting in a Canadian election since he lived in Quebec in the 1970s.

1) First Electoral Event

On March 17, 2008, he proceeded using his walker to vote at St. Basil's Church in downtown Toronto. St. Basil's has three entrances: entrance #1 (main one, south side); entrance #2 (back one, north side); and entrance #3 (side one, west side).

From the street, the Complainant walked up a sloped hill on a long, winding path to entrance #1. At the front door was a handicap ramp which Rev. Hughes found to be acceptable. He found some "cryptic, yellow" EC signs, but they pointed away from entrance #1 and toward entrance #3. Entrance #1 was locked. Rev. Hughes proceeded around the building to entrance #3. When he opened the door, he found a flight of stairs leading downward.

Rev. Hughes was not able to get down the stairs without assistance. He called out for assistance, and someone who appeared to be an EC official came over and told him he could either come down the stairs or walk around the building (to entrance #2). Rev. Hughes chose to stay at entrance #3. The official took his walker down the stairs and Rev. Hughes then proceeded to go down the stairs on the seat of his pants. The walker was put back together and Rev. Hughes walked down the hallway to the election polling stations in the basement hall.

However, when he arrived in the hall, he was not able to vote in the polling booth because the tables were placed too close together, blocking his path. EC officials had to re-arrange the tables. While in the Church basement hall, Rev. Hughes told an EC official about his "difficult voting experience." Rev. Hughes recalled that the person replied that the lack of accessibility was for financial reasons.

After Rev. Hughes marked his ballot, his departure was no less difficult. Rather than go back through entrance #3, the EC officials offered to help him leave through the back way, entrance #2, adjacent to the parking lot. Rev. Hughes had to walk up a steep, narrow ramp which caused him great difficulty with his walker. The two doors leading out to the parking lot, which were heavy, steel doors, were not open. There was no automatic opening mechanism and only one of the two doors was openable. Rev. Hughes' walker had to be folded in order to get it through. Outside the doors, there was snow on the ground which had not been sufficiently cleared. The width shoveled looked like it had been done with ambulatory people in mind. It was barely wide enough for his walker's wheels, and not wide enough for a person using a wheelchair. There was a sloped ramp downward which was described by Rev. Hughes as steep and slippery. Rev. Hughes could not have exited through entrance #2 without assistance.

2) Written Complaint to EC, Complaint to CHRC, and EC's responses

In addition to his verbal complaint on the day of the election, Mr. Hughes made a written complaint to EC on March 20, 2008 with the assistance of his counsel. Although it was addressed correctly it was routed to the wrong official at EC. It was then forwarded to the Legal Services Directorate at EC. Rev. Hughes heard nothing from EC regarding his verbal and written complaints to it (other than a letter from the official who had originally received the letter indicating that it had been forwarded to Legal Services) until receiving EC's August 6, 2008 letter to the Commission. On June 5, 2008, Rev. Hughes had filed a CHRA Complaint with the Commission. The August 6th letter was EC's response to the CHRA Complaint. EC had its officials investigate Rev. Hughes' Complaint, although he didn't speak to them directly about it and didn't personally speak to the Toronto Centre Returning Officer or other relevant EC officials at the St. Basil's Church polling stations.

The Tribunal found that EC's response to the written complaint to EC and to the CHRA complaint was not timely, contained inaccuracies, and was dismissive in tone. In the August 6th letter, EC made a number of factual errors including stating that all three entrances were unlocked during voting hours.

3) The Second Electoral Event

On October 14, 2008, Canadians went to the polls in a federal general election. Mr. Hughes received a Voter Information Card, indicating that his polling station would be at St. Basil's Church once again. The Card had the universal accessibility symbol on it. Mr. Hughes was hopeful that things would be different this time, and that EC had addressed his concerns.

However, Rev. Hughes experienced the same lack of accessible voting on October 14th, except for the snow on the ground. When he went to St. Basil's, the front door (entrance #1) with its accessible ramp was again unavailable. This time he proceeded to entrance #2, where he found one of the doors was being held ajar by a broken rock. He could not open the heavy steel door himself. With assistance, he entered via entrance #2, voted and left the same way. Rev. Hughes was quite upset that, notwithstanding his verbal and written complaints to EC some seven months earlier and his June 2008 Complaint to the Commission, EC had not remedied the problem by providing a barrier-free polling facility to exercise his important democratic right to vote.

4) Post-Election, Tribunal Hearing and Decision

Following the election, the Commission referred the subject-matter of the Complaint to the Tribunal on December 29, 2008. EC commissioned architect and accessibility expert Robert Topping to do an on-site inspection of St. Basil's Church and report on certain accessibility issues in March 2009. He outlined some of the problems with the St. Basil's facility from a barrier-free perspective. As a result of Rev. Hughes' Complaint, Mr. Topping's report, the steepness of the incline and better alternative locations in the area, prior to the hearing EC decided that it would no longer use St. Basil's Church as a polling location, notwithstanding some of its "significant advantages" (e.g., parking, community use and prior election use).

The Canadian Human Rights Tribunal held a hearing on Rev. Hughes' complaint in October, 2009 and rendered a decision on February 12, 2010. EC admitted liability at the beginning of the hearing. EC's official at the hearing testified that EC has learned a lot from the negative voting experience of Rev. Hughes, and it has made improvements. EC also agreed to many of the systemic remedies requested by the Complainant. However, EC argued that the evidence did not demonstrate a systemic problem, but rather that it was a

case of human error – of people not doing things correctly within the system that was in place.

The Tribunal pointed out that the system is made up of people, and that the "problem is not so much the standards or policies on accessibility, or EC's training in regard to them", but "[t]he problem is more in the nature of the policies and guidelines and training not being followed or applied by EC officials". The Tribunal reiterated the importance of the right to vote, and that it is protected in the Charter. The Tribunal also stated that it is arguably a duty of citizens of Canada to vote, and that the State has a legal duty to ensure that all barriers, whenever possible, are removed. The Tribunal also relied upon the evidence of disability rights/accessibility expert Professor Catherine Frazee who explained the barriers that people with disabilities face in society, structurally and attitudinally, including details of "disability disadvantage".

5) Remedies

The Tribunal awarded Rev. Hughes damages for compensation for pain and suffering. The amount was based in part on the fact that "voting is one of the most sacred rights of citizenship and that includes the right to do so in an accessible context." However, the majority of the remedies are systemic in nature and most are to be completed by EC within either 6 months or 12 months. (The time frames are to be suspended for three months in the event of a general election, other than the time frames for the individual remedies and the cease order.) The Canadian Human Rights Commission has a monitoring role over the implementation of the decision, and EC is to consult with the other parties (the Complainant, the Commission, and the Council of Canadians with Disabilities who intervened as in interested party in the case.) The following list is a summary of the systemic remedies that the Tribunal has ordered Elections Canada to carry out:

- Greater consultation with voters with disabilities and disability groups, with a consultation plan to be formulated within 6 months upon discussion with other parties. (6 months)

- Cease order re situating polling stations in locations that do not provide barrier-free access, subject to standard of bona fide justification and the duty to accommodate to the point of undue hardship, once a prima facie case of discrimination has been established. - Implement a procedure for verification of accessibility of facilities on the day of an electoral event and consult with other parties regarding same. (6 months)

- Review of Accessible Facilities Guide, Accessibility Checklist, and accessibility sections of the Manuals for ROs and other categories of election workers (CPSs, DROs, Poll Clerks, Information Officers and Registration Officers), and consult with other parties about same. (12 months)

- Revise standard lease for polling locations to include the requirement that the leased premises provide level access and are barrier-free, and consult with other parties about same. (6 months).

- Provide sufficient and appropriate signage at elections, including the universal accessibility symbol so that voters with disabilities can easily find the shortest and most appropriate route to all accessible entrances at polling stations, and consult with other parties about same.

- Review, revise and update training manuals and programs concerning accessibility issues for ROs and officials below them, and training to be given to every officer or employee who deals with disability and accessibility issues, including the CEO and senior management, the accessibility officers at national headquarters, the ROs and others in the electoral districts. EC officials are to be trained as well on the new public complaints process. The training materials are to include the *Hughes v. Elections Canada* reasons for decision, and a case study made from it for training purposes. EC is to consult with other parties about same. (12 months)

- Implement a procedure for receiving, recording and processing verbal and written complaints about lack of accessibility and suitably publicize same. EC shall execute this reporting requirement for a period of three complete general election cycles. EC is to consult with other parties about same. (6 months)

- Elections Canada is to report to the Tribunal in at least three-month intervals about its progress in implementing the Order, and the Tribunal remains seized in the matter to the later date of the reporting of accessibility complaints by EC after the next general election and the implementation of the other parts of the Order, including any further implementation Orders as required.

Case Study - Rev. James Peter Hughes

In compliance to the orders of the decision by the Canadian Human Rights Tribunal, Elections Canada has put in place several new procedures to ensure polling sites are accessible for all electors. Following the reading of the summary, reflect on the following questions:

- How would you have reacted had you had been in Rev. Hughes' position?
- Remembering what you have learned on the duty to accommodate, how would you have reacted if you had been in the position of the election official who was providing assistance?
- How could the situation have been handled differently? What steps could have been taken to address the obstacles to accessibility?
- With the new accessibility procedures that Elections Canada has put in place, how would this incident be resolved differently if it happened during the next general election?

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