

# Questions and answers about our web based guidance

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## Why has the format of the guidance changed from PDF?

It is important that our guidance can be accessed by everyone. We have a legal requirement to ensure that our website is accessible, under [The Public Sector Bodies \(Websites and Mobile Applications\) Accessibility Regulations 2018](#). The government's Central Digital and Data Office (CDDO) ensures these regulations are adhered to, and provides [guidance to understand the requirements](#).

Our website is [WCAG 2.1 AA compliant](#), which means those with access needs (such as those with visual impairments) can utilise inbuilt functionality or assistive technology to access information they need. Our [Accessibility Statement](#) includes further information on this.

To ensure our compliance with the accessibility standards we have moved away from the PDF format and are working towards presenting all guidance in a web-based format, in line with modern practice and evolving technology.

As well as helping us to maintain our compliance with the accessibility standards, this approach aims to make the guidance easier to navigate and use.

## Key benefits of presenting guidance in a web-based format

- By reading the guidance on the website rather than saving or printing PDFs you can ensure you are always aware of the most up to date and accurate guidance and legislative requirements.
- You can email links to specific sections of the guidance when people have questions.
- The search functionality within the guidance section of the website can be used to help pinpoint answers to specific questions.
- Our content can be less repetitive as we can use links to relevant sections instead of repeating text in multiple locations, which results in smaller volumes of guidance to read and navigate.

- The Commission will be able to update all versions the guidance (i.e. for different election types) more quickly and efficiently when a change is required, meaning that the guidance is up to date to support by elections of any type rather than just being updated for scheduled polls.
- The guidance can be filtered by location, meaning you can read content relevant only to your area which again results in smaller volumes of guidance to read and navigate.

## How do I access the guidance?

Our guidance landing page allows you to select the type of guidance you want to access:

The Electoral Commission

English [dropdown] [search icon]

[About us](#) | 
 [Our guidance](#) | 
 [Voting and elections](#) | 
 [Research, reports and data](#) | 
 [Political registration and regulation](#) | 
 [News and views](#) | 
 [Resources](#)

### Our guidance

We provide guidance about the process of running elections, standing as a candidate, and campaigning at an election.

- Electoral Administrator
- Candidate or agent
- Political party
- Campaigner
- Other regulated individuals and organisations
- Police election SPOC (Single Point of Contact)

If you select 'Electoral Administrator', from here you will then be able to choose the core guidance you require:

The Electoral Commission

English [dropdown] [search icon]

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## Electoral Administrator

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**Guidance for Returning Officers**

Guidance and resources for running elections and referendums.

[Next →](#)

**Guidance for Electoral Registration Officers**

Guidance and resources for running electoral registration services and delivering the canvass.

[Next →](#)

Once you have accessed the core guidance you require, you can use the filters to access the specific guidance you need.

### **Electoral Registration Officer (ERO) guidance**

There are separate versions of the guidance for Electoral Registration Officers in England, Scotland and Wales to reflect the differences in franchise.

### **Returning Officer (RO) guidance**

There are separate versions of the guidance for Returning Officers to reflect each of the election types to be administered (including combination guidance where combined polls are scheduled).

### **Other guidance for electoral administrators**

We have also produced guidance on a range of other key subjects in this format including assistance with voting for disabled voters, polling district reviews and data protection.

### **Candidates and agents guidance**

There are separate versions of the guidance for candidates and agents to reflect each of the election types.

We are still working on moving all our existing guidance into the web based format and will update users via an EA Bulletin when this process has been completed. In the meantime the rest of the guidance for ROs and candidates and agents can be accessed further down each of those respective landing pages in the current PDF format.

## **How do I navigate through the guidance?**

Once you are in the guidance book that you have selected the navigation tree on the right-hand side of the page shows the main sections within that guidance, similar to the parts that previously existed in the PDF format.

To access a particular section of the guidance, simply click on the heading in the navigation tree.

When you click on each heading, the text will appear underlined, showing you where you are in the guidance. In the example below, you are in the National Data Matching section. You can see that the heading in the navigation tree is underlined and the text in the centre of the webpage reflects that heading.

For this section guidance is split into each of the tasks associated with it. Each task has its own heading and these headings are indented and nested underneath the main section heading of the guidance they relate to as you can see in the example below.

## National data matching

This guidance covers what you need to know about the national data match step including what it is, what data you need to include and exclude, how and when to send your data and how to process the

considerations for an Electoral  
Registration Officer?

### National data matching

What is the national data match step?

What data do I need to send?

Who will be excluded from the national data match step?

Should recent additions be excluded from the national data

You can navigate through the guidance by either clicking each of the section headings and related task headings sitting beneath them in turn, or by scrolling to the bottom of the page and clicking on the left or right arrow to take you to the next or previous page in the guidance, as shown in the example below.

## What data do I need to send?

The data you send for the national data match step in relation to all persons aged 16 or over who appear on the parliamentary and local government registers must include: <sup>[1]</sup>

- the full name, including any middle name(s) or initials you may hold
- the date of birth (where held)
- the full address, including postcode

< What is the national data match step?

Who will be excluded from the national data match step? >

Registration Officer?

### National data matching

What is the national data match step?

What data do I need to send?

Who will be excluded from the national data match step?

Should recent additions be excluded from the national data match step?

When do I need to send my data?

## Where are the accompanying resources?

Some of the resources and tools we provide will appear within each relevant section of the guidance. For example, a link to our data protection resource will appear on each webpage for the section of guidance it appears in.



When can I carry out local data matching and how long will it take?

[Are data sharing agreements required when I access local data?](#)

Links to other resources will be made available on a separate resources page which will appear at the end of each chapter and also at the very end of the navigation tree.

### Agents

This section of the guidance covers the appointment of election agents, the requirement to give public notice of the appointment of election agents and how an appointment can be revoked.

You will also find guidance on the appointment of agents to attend postal vote openings, polling stations and the verification and count, and information on the secrecy and conduct requirements for attendance at these key electoral events.

Last updated: 25 October 2022

Resources for (Acting) Returning Officers  
- Nominations

Appointment of election agent

Guidance for (Acting) Returning Officers administering a UK Parliamentary election in Great Britain

- Returning Officer and (Acting) Returning Officer ▾
- Planning for the election ▾
- Voter Materials ▾
- Starting the election timetable ▾
- Nominations ▾
- **Agents ▾**
  - Appointment of election agent ▾
  - Postal, Polling and Counting Agents ▾
  - **Resources for (Acting) Returning Officers - Agents**
- Absent Voting ▾

## Where are the legal references?

Where guidance is based on legislative requirements, this is indicated by an endnote reference number appearing next to the text as per the example below.

The legal references then appear as endnotes at the bottom of each section of guidance. If you click on the reference number within the text it will automatically take you to the relevant legal reference at the bottom of the page.

 [Visual overview of Route 1 process \(PDF\)](#)

Properties can be canvassed using Route 1 where: <sup>[1]</sup>

- You are satisfied that there are no changes needed at that property and you have no reason to believe that there are any additional electors to be added
- You have carried out local data matching to confirm the status of the property as empty or void.

## Endnotes



1. Reg. 32ZBA(4) and Reg. 32ZBE(1) The Representation of the People (England and Wales) Regulations 2001 [↩](#)

## How do I search the guidance?

We strongly recommend using only the guidance search functionality within the guidance section of the website rather than using other search engines or the Commission's website wider search functionality – there is an ongoing project looking at the wider website search functionality currently taking place.

The guidance search tool allows you to locate information on a specific topic within the guidance through use of the Keyword search option.

The Electoral Commission




English  


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## Guidance: Electoral Registration Officer

Use the Where am I and Guidance on filters to access links to the guidance you need.  
Click on the guidance topic you are looking for to access the complete suite of guidance for that topic.  
Additionally you can use the optional keyword search to help you find specific pages of guidance.

**Where am I**      **Guidance on**      **Keyword search**

Filter by location       Filter by guidance on...       Keyword search 

[Clear all filters](#) 

For best results, you should also apply the 'Where am I' and 'Guidance type' filters then type a common word or phrase and click the magnifying glass icon.

Your search will display a list of clickable results, prioritised by the most relevant content.

The number of options returned will depend on the nature of your search and how precise or narrow your search term is.

If required, you can still create and search a PDF version of the guidance. To do this use the print full guidance option and choose the option to save as PDF rather than print. This allows you to save guidance as a PDF in the location of your choice, allowing you to search the PDF using the previous method if you choose.

## Can I print the guidance?

Yes. By clicking the 'Print full guidance' link you are able to print all of the guidance in full. You can also choose to just print a particular page by clicking the printer icon (as shown below) on each page of guidance.



Please always remember to also check the web version of guidance when referring to printed copies to ensure you are accessing the most up to date version of the guidance at all times.

## Can I share links to the guidance?

Yes. Each page of the guidance is separate, so you can share a link to any page you choose. If you click the 'email' icon you will be able to share a link directly from the website itself.



## How will I know when the guidance has been updated?

When significant changes are made to the guidance we will announce this in our EA Bulletin. These updates will also be summarised in a change log which can be found on the landing page for each suite of guidance. Additionally, there is a box at the bottom of each page which indicates when that page was last updated, so you will be able to tell if the guidance has been updated since you last looked at it.

Last updated: 9 April 2020

## What do I do if I need help?

If you have any queries or concerns, or require any further support, please contact:

- **In England** [infoengland@electoralcommission.org.uk](mailto:infoengland@electoralcommission.org.uk)
- **In Scotland** [infoscotland@electoralcommission.org.uk](mailto:infoscotland@electoralcommission.org.uk)
- **In Wales** [infowales@electoralcommission.org.uk](mailto:infowales@electoralcommission.org.uk)