

These directions were issued 2/21/2012 and are meant to replace corresponding pages in the Election Setup chapter in the SVRS Manual. 1) All Polling Place Assignment Plans must now be set up using the District Type of Ward, in order to accommodate the G.A.B.'s Provisional Ballot Tracking System. 2) Reporting Unit Descriptions must not include the name of the municipality, only a single ward or group of wards. This is to accommodate the G.A.B. Canvassing System.

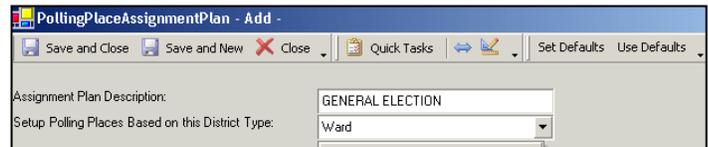
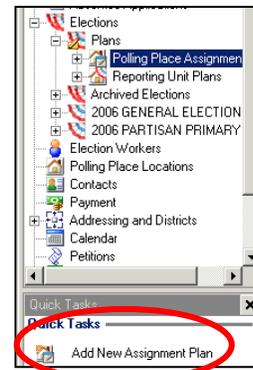
## Create a Polling Place Assignment Plan



A Polling Place Assignment Plan (PPAP) is a reusable template listing the polling place locations, election workers, and supplies needed for a certain type of election. You can create and maintain multiple PPAPs if different types of elections use a different number of polling places or different polling place locations.

Prior to setting up a Polling Place Assignment Plan, you should create your Polling Place Locations and (optionally) Election Workers in SVRS. See the Polling Places and Election Workers chapters for more information.

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** node.
3. Click **Polling Place Assignment Plans**.
4. Click the **Add New Assignment Plan** Quick Task to open the **Polling Place Assignment Plan – Add** form.
5. In the **Assignment Plan Description** box, type a name for the Plan.
6. Select the **District Type** of **Ward**.



### Polling Place Assignment Chart

If you have:		Polling Place Assignment	If you want this type of resulting Poll Books*	Choose this District Type
Ward(s)	Polling Location(s)			
Each ward	In different polling place location	Each Ward assigned to a distinct polling place location (e.g. Ward 1 assigned to Fire Station and Ward 2 assigned to Jefferson School)	<ul style="list-style-type: none"> <li>• 1 poll book for each ward</li> <li>• Alphabetized by voter name</li> <li>• All voters in the relevant ward</li> </ul>	Ward
Each ward	In 1 polling place location	2 or more Wards assigned to the same physical location. (e.g. Ward 1 assigned to Fire Station, and Ward 2 also assigned to Fire Station)	<ul style="list-style-type: none"> <li>• 1 poll book for each ward</li> <li>• Alphabetized by voter name</li> <li>• All voters in the relevant ward</li> </ul>	Ward
Multiple wards	In 1 polling place location	2 or more Wards assigned to 1 polling location (Consolidated)	<ul style="list-style-type: none"> <li>• 1 poll book for each polling place location</li> <li>• Alphabetized by voter name (Co-mingled across wards)</li> </ul>	Ward then Consolidate Districts (Pg. 7, this chapter)

7. Click **Save and Close** button.

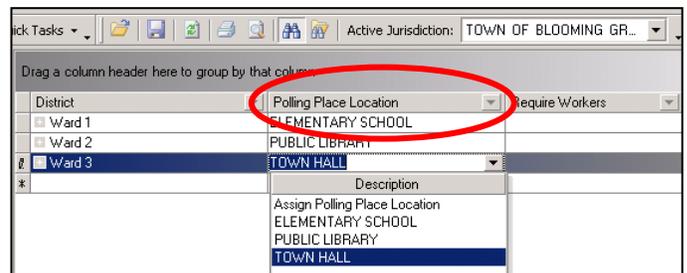
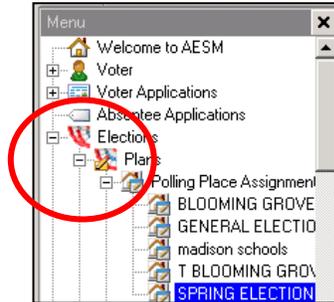
## Add Details to a Polling Place Assignment Plan



After creating a Polling Place Assignment Plan, you must add details to tell SVRS which voting districts that polling place serves on election day. If you do not, your poll lists will not contain any names.

You may also add details about the election workers and supplies that the polling place needs for an election. Adding election workers and supplies is optional.

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** node.
3. Expand (+) the **Polling Place Assignment Plans** node.
4. In the menu tree, click on the name of the PPAP to which you wish to add details.
5. Assign a **Polling Place Location** to each district on the grid.
  - a. Click in the first empty box immediately below the **Polling Place Location** field name.
  - b. Click the drop down arrow and select the **Polling Place Location** serving the district listed on that row of the grid.
  - c. Repeat for each District in the grid.



Assigning polling places to an assignment plan affects the poll books for elections using that plan. SVRS will print one poll book for each row in your plan, containing the names of all the voters residing in the ward or wards listed in the **District** column.

If you add the same polling place to two different Districts, you will receive the following message. Click **Yes** unless the duplicate assignment is a mistake.



Adding the same polling place to two or more districts listed on two or more rows will not produce a single list containing the names of all voters in those districts. To print in a single list, all districts must be added to a single row. To combine voters from different districts on the same poll list, follow the instructions for [Consolidating Districts into one Poll List](#), starting on page 7 of this chapter.

## Consolidating Wards into one Poll List



Any time a polling place location is used by multiple wards that report election results as a single unit, those districts can be consolidated within a PPAP. By doing this, the poll books you print will contain the names of all voters in those wards, listed in alphabetical order. If you prefer to have separate poll books for each ward sharing a polling place location, do not consolidate districts.

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** node.
3. Expand (+) the **Polling Place Assignment Plans** node.
4. Click the name of the plan in which you wish you consolidate wards.
5. Click on the row in the data grid for one of the **Districts** that you wish to consolidate.
6. Click the **Delete Polling Place** quick task.
7. SVRS will ask you to confirm your action, click **Yes**.
8. Repeat **Steps 5-7** for all but one of the wards you wish to consolidate.
9. Click the **Recruit**  icon on the toolbar to open the **Recruit** pane.
10. Click the **Districts** tab in the **Recruit** pane.
11. In the data grid of the **Recruit** pane, click on the district that you want to consolidate and drag it to the **District** box containing the ward it will join.



You can also assign wards to the plan by:

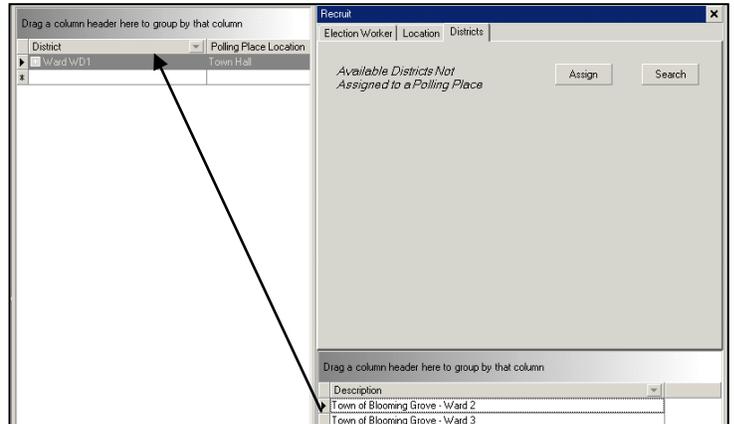
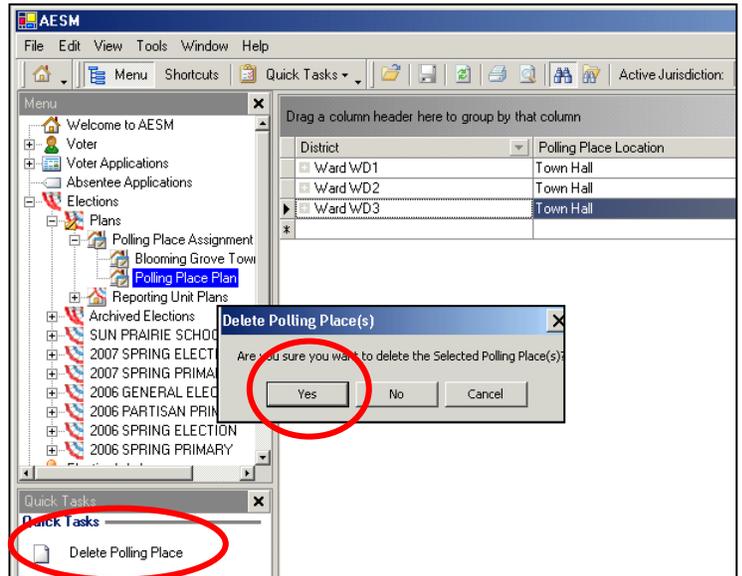
- On the main data grid, click the row where you would otherwise have dragged the districts you wish to consolidate.
- On the **Districts** tab of the **Recruit** pane, click the ward.
- Click **Assign**.

12. Repeat **Step 11** until all wards are assigned to a polling place.

- **Cons:**, meaning “consolidated” will appear in the **District** box for any row on which you have assigned multiple districts to a single polling place.

District	Polling Place Location	Require Workers
Cons: WD1, WD2, WD3	Town Hall	

13. Close [x] the **Recruit** pane.



## Create a Reporting Unit Plan

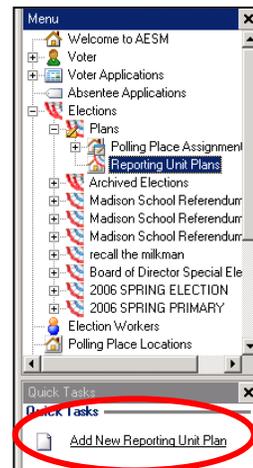


Following each election, municipal clerks report the results of the election to their county clerk. In order to capture election results in SVRS, you must first tell the system how your municipality reports election results. The first step in this process is creating a reporting unit plan.

Reporting units are the ward or combination of wards by which a municipal clerk reports their election results to their county. Reporting units may change from election to election depending on what races are on the ballot. Your county clerk will be able to assist you in determining your municipality's reporting unit(s).

In SVRS, a reporting unit plan acts much like a Polling Place Assignment Plan (PPAP) by allowing you to create a reusable template to which you can add details about how you report election results for a particular type of election. When you create a reporting unit plan for a particular type of election in SVRS it should match with how you report your results to the county for the election. The Reporting Unit plan should also match your Polling Place Assignment Plan.

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** node.
3. Click the **Reporting Unit Plans** node.
4. Click the **Add New Reporting Unit Plan** Quick Task to open the **Reporting Units – Add** window.
5. In the **Reporting Unit Plan Description**, type a description for your plan. The name can be anything that you will recognize as a plan to use for a specific type of election.
  - For example, if you report election results differently based on whether it is a Spring or a General election, you would want two plans, one named Spring, and the other named General.



ReportingUnits - Add

Save and Close Save and New Close Quick Tasks Set Defaults Use Defaults

Reporting Unit Plan Description: T OF BLOOMING GROVE FALL

Setup Reporting Units Based on this District Type: Ward

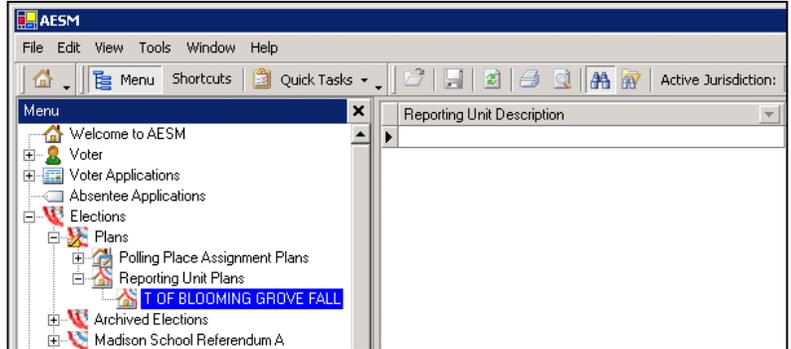
6. In the **Setup Reporting Units Based on this District Type** list, select **Ward**.
7. Click **Save and Close**.

## Add Detail to a Reporting Unit Plan



After creating a Reporting Unit Plan, you must add details about your specific reporting units. These details list which ward or group of wards are contained in which reporting unit(s).

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** node.
3. Expand (+) the **Reporting Unit Plans** node.
4. Click on the name of the plan to which you wish to add details.

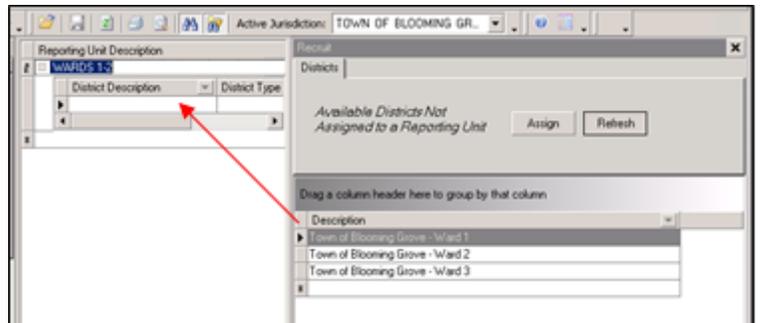


5. Click in the first empty box under the column named **Reporting Unit Description** and type in the name of a specific reporting unit.
  - The convention for naming a reporting unit is Ward # (or Wards # - #). Do not use the municipality name in the Reporting Unit Description. This will cause the municipality name to show up twice in the G.A.B. Canvassing System.

- Repeat this step for your remaining reporting units, entering each name into successive rows on this screen.



6. Click the **Recruit**  button in the toolbar to open the **Recruit** pane.
7. In the Recruit pane, click the **Districts** tab.
8. To associate your wards with the correct reporting unit:
  - Click on a district in the **Recruit** pane data grid and drag it into the box with the name of the **Reporting Unit** with which you wish to associate that ward.
  - Repeat this step until all wards are associated with a **Reporting Unit**.



Alternatively, you can assign wards to a reporting unit by:

- On the main data grid, click the row to which you want to add districts.
- On the **Districts** tab of the **Recruit** panel, click the ward.
- Click **Assign**.



Any changes made to the details of a reporting unit plan are saved automatically.