

SVRS Election Checklist I: Inheriting and Setting-Up the Election
2014 Spring Primary 2014 Spring Election
February 18, 2014 April 1, 2014



This Checklist covers the following for the 2014 Spring Primary and 2014 Spring Election:

- ✓ Special Information on inheriting the spring elections in SVRS
- ✓ County election setup tasks
- ✓ Municipal election setup tasks
- ✓ Voter data quality (ensuring accurate poll books)

Please complete the tasks as outlined. Contact the G.A.B Help Desk at 608-261-2028 or gabhhelpdesk@wi.gov with any questions.

SPECIAL INFORMATION ON INHERITING ELECTIONS - FOR ALL COUNTY AND MUNICIPAL SVRS USERS

Inherit with Care and Caution: Because there is not a statewide office on the spring primary ballot, some jurisdictions will not need to inherit the 2014 Spring Primary in SVRS.

You will need to determine whether you should inherit the 2014 Spring Primary. In most cases, this will be determined after the January ballot access and challenge deadlines. **Only inherit the 2014 Spring Primary in SVRS if you have a contest on the primary ballot.**

- Both Counties and Municipalities for which a Court of Appeals or County Circuit Court contest is on the primary ballot (see G.A.B. certification of candidates in January) must inherit the 2014 Spring Primary.
- Counties with any local contest including county, municipal, school district, technical college, MJJ or sanitary on the primary ballot must inherit the 2014 Spring Primary.
- Municipalities with a county, school district, technical college, MJJ or sanitary contest on the Spring Primary ballot must inherit the 2014 Spring Primary.
- If you mistakenly inherit the 2014 Spring Primary and will not have any contest on the ballot, promptly notify the G.A.B. Help Desk. Only the G.A.B. IT Team can remove an inherited election from your jurisdiction.
- Finally, do not create your own primary election in SVRS. If you have a contest on the primary ballot, you must inherit the 2014 Spring Primary.

All Counties and Municipalities should inherit the 2014 Spring Election.

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COUNTY LEVEL TASKS FOR ELECTION SETUP

| Tasks To Complete | Explanation |
|--|---|
| <input type="checkbox"/> Step 1: Inherit the <ul style="list-style-type: none"> • 2014 Spring Election • 2014 Spring Primary (if appropriate) | The G.A.B. has created the 2014 Spring Primary and the 2014 Spring Election. All counties need to inherit the 2014 Spring Election and only those with a contest on the primary ballot should inherit the 2014 Spring Primary. <i>SVRS Manual: Election Setup, page 4</i> |
| <input type="checkbox"/> Step 2: Check Milestone #2 | Milestone #1 is automatically checked when the election is inherited. Checking Milestone #2 allows you to enter local contests and candidates. |
| Counties should inherit and check Milestone #2 for their Relier communities. | |
| <input type="checkbox"/> Step 3: Notify all municipal Self-Providers that Milestone #2 is checked | Self-Providers can then inherit the election, check Milestone #2 and begin entering contests and candidates. |
| <input type="checkbox"/> Step 4: Run the Pre-Canvass Reporting Unit List and Reporting Unit Exception Reports | These reports are in the G.A.B. Canvass Reporting System. All counties should then communicate with their Self-Provider and Relier municipalities to ensure that the reporting units used for the 2014 Spring Election in SVRS <u>match</u> the programming established for the Electronic Voting Equipment. <i>SVRS Manual: Canvass, pages 4-6</i> |
| <input type="checkbox"/> Step 5: Begin entering contests and candidates | Counties must enter all county level contests as well as candidates and municipal contests on behalf of their Reliers. <i>SVRS Manual: Election Setup, pages 15 -26 (22-26 are optional)</i> <i>*Please pay particular attention to the <u>contest ballot position instructions</u> (found in the table) on page 17. Election Setup</i> |
| <p>Attention:</p> <ul style="list-style-type: none"> • The State must enter <u>ALL School District</u> (school board members and referenda) and <u>MJJ contests</u> in SVRS for both 2014 Spring Primary and 2014 Spring Election (as well as any Technical College referenda). <ul style="list-style-type: none"> ○ County Clerks were sent additional instructions from G.A.B. staff on the process for reviewing school district and MJJ contests in SVRS and for submitting contest and candidate information to the G.A.B. Help Desk. • Counties must enter <u>ALL</u> sanitary district contests in SVRS (which was a change beginning in 2013; previously these were entered at the municipal level). • The quality of ballots accessed by military voters through the MyVote website (myvote.wi.gov) depends on the care and conscientiousness with which election officials have entered the contest and candidate information in SVRS. Please give special attention to contest ballot position and ballot instructions when entering contests and candidate ballot position when entering candidate filings in SVRS. | |

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MUNICIPAL SELF-PROVIDERS/PROVIDER TASKS FOR ELECTION SETUP

| Tasks To Complete | Explanation |
|---|---|
| <input type="checkbox"/> Step 1: Report annexations to G.A.B. | Report any annexations on the GAB-100 Form since the last election to the G.A.B. This helps ensure voters are correctly districted and vote the correct ballot in the Spring Election (and Spring Primary). |
| <input type="checkbox"/> Step 2: Review Polling Place Assignment Plans (PPAPs) | Determine which PPAP will be used for this election. If none of the existing PPAPs match the poll book setup for this election, a new PPAP must be created. <i>SVRS Manual: Election Setup, page 4</i> |
| <input type="checkbox"/> Step 3: Review Reporting Unit Plans (RUPs) | Determine which RUP will be used for this election. Make sure you select a RUP that matches how you will be reporting your Spring Primary results. <i>SVRS Manual: Election Setup, page 8</i> |
| <i>Be sure the Polling Place Assignment Plan matches the Reporting Unit Plan. These plans also must match the programming of your Electronic Voting Equipment. Verify this with your County.</i> | |
| <input type="checkbox"/> Step 4: Inherit the <ul style="list-style-type: none"> • 2014 Spring Election • 2014 Spring Primary (if appropriate) | The G.A.B. has created the 2014 Spring Primary and the 2014 Spring Election. All municipalities need to inherit the 2014 Spring Election and only those with a contest on the primary ballot should inherit the 2014 Spring Primary. |
| <input type="checkbox"/> Step 5: Check Milestone #2 | Milestone #1 is automatically checked when the election is inherited. Checking Milestone #2 allows you to enter local contests and candidates. |
| <input type="checkbox"/> Step 6: Begin entering contests and candidates | Municipalities must enter all local contests and candidates in SVRS. <i>SVRS Manual: Election Setup, pages 15 -26 (22-26 are optional)</i> <i>*Please pay particular attention to the instructions for contest ballot position numbers on page 17. Election Setup</i> |
| <u>Attention:</u> <ul style="list-style-type: none"> • The State must enter School District (school board members and referenda), technical college and MJJ contests in SVRS for both the 2014 Spring Primary and 2014 Spring Election. <ul style="list-style-type: none"> ○ Municipalities should review school district and MJJ contests and candidates (as well as any technical college contests, if applicable) and report any errors or omissions to the G.A.B. Help Desk. • Counties must enter sanitary district contests in SVRS. Municipalities should communicate to their County any sanitary district contest for both 2014 Spring Primary and 2014 Spring Election. • The quality of ballots accessed by military voters through the MyVote website (myvote.wi.gov) depends on the care and conscientiousness with which election officials have entered the contest and candidate information in SVRS. Please give special attention to contest ballot position and ballot instructions when entering contests and candidate ballot position when entering candidate filings in SVRS. | |

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VOTER DATA QUALITY: ENSURING ACCURATE POLL BOOKS

| Tasks To Complete | Explanation |
|---|---|
| <p>Mapping</p> <ul style="list-style-type: none"> <input type="checkbox"/> Review Geo DC Mismatches <input type="checkbox"/> Review Boundary Exceptions <input type="checkbox"/> Review Voters with District Combos =1 <input type="checkbox"/> Review Geocode Exceptions <input type="checkbox"/> Review Geocode Warnings | <p>These are data quality tasks that clerks must perform in order to ensure the quality of the address and district data in SVRS. Making sure voters have the correct district combo ensures they appear in the correct poll book.</p> <p><u>NOTE:</u> There are new data quality counts with the SVRS 8.5 Release on 9/23/2013. The Mapping Chapter has been updated to reflect these changes and there is a Mapping webinar, which further highlights these changes: http://gab.wi.gov/clerks/education-training/webinars</p> <p style="text-align: right;"><i>SVRS Manual: Mapping</i></p> |
| <p>HAVA Matches</p> <ul style="list-style-type: none"> <input type="checkbox"/> Duplicate Voter Record Matches <input type="checkbox"/> Death Matches <input type="checkbox"/> Felon matches | <p>Merging duplicate voter records, cancelling records of voters who have passed away, and inactivating felon voter records help to ensure an accurate poll book. These tasks are required by the Help America Vote Act (HAVA) and must be performed by clerks.</p> <p><u>NOTE:</u> There is also a recent List Maintenance webinar which includes a review of HAVA Matches: http://gab.wi.gov/clerks/education-training/webinars</p> <p style="text-align: right;"><i>SVRS Manual: HAVA Interfaces, pages 7-19</i></p> |

SVRS MANUAL LINK (FOR ALL CHAPTERS): <http://gab.wi.gov/node/798>

The *Election Setup, Canvass, Mapping* and *HAVA Interfaces* chapters are referenced in this Checklist.

LOOKING AHEAD:

2014 Spring Primary Checklist II – Generating Ballot Styles and Checking Milestone #4

- Checklist II will be posted after the G.A.B. certifies candidates (Deadline of January 14, 2014).

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