

## WisVote Webinar Outline: Preparing for the Spring Elections

- I. Election Plans
  - a. Check for an existing plan
    - i. Review existing plan if one exists
  - b. Add an Election Plan to the Spring Election – Odd election type
    - i. Copy existing plan
    - ii. Create new plan
  - c. Add an Election Plan to the Spring Primary
    - i. Copy existing plan
    - ii. Create new plan
- II. Adding Contests & Candidates
  - a. Overview

	2017 Spring Election	2017 Spring Primary
Election Plan	✗	✗
Office Contests	✗	✗
Other Contests	✓	✓
Candidates	✓	✗

- b. Review Office Contests in Spring Election (they will not be displayed in Spring Primary at this time)
- c. Contact the Elections Commission if any of the office positions are missing or if there is a special office contest on the ballot for the Spring Election
- d. Add any referenda to either the Spring Election or Spring Primary
- e. Enter Candidates into the Spring Election
  - i. Under the specific contest
  - ii. Under the Candidates tab on the Spring Election
- f. Add contests & candidates to the Spring Primary via the contest in the Spring Election
  - i. Open the Contest under the Spring Election
  - ii. Review and confirm that all qualified candidates have been added and have status set to Approved
  - iii. On the contest, change the Primary Required field from No to Yes
  - iv. Enter the primary date
  - v. Review the contests in the Spring Primary to be sure both the contests and candidates have been included
- g. After the primary, update the candidate records in the Spring Election
  - i. Open the Spring Election and either open the Candidates tab or open a specific contest
  - ii. Deactivate any candidates who will advance from the primary
  - iii. If you have determined the ballot position for the advancing candidates, change the ballot position on each of the candidates

- III. Data Quality
  - a. What data quality tasks should you focus on?
    - i. Addresses issues
      - 1. No District Combo
      - 2. Geocode warnings and exceptions
    - ii. Duplicate Records
    - iii. Felon Matches
    - iv. Death Matches
  - b. When should you focus on data quality tasks?
    - i. Regular maintenance
    - ii. Before issuing and printing absentee ballots/labels
    - iii. Before printing the poll book
  - c. Is there a time when you shouldn't perform data quality tasks?
    - i. Addresses can be fixed at any time (but be aware that the changing the address might impact the poll book where the voter record should be)
    - ii. Reg List Alerts (duplicate, felon, death) should not be done after the poll book has been printed until after you have finished recording votes and reconciling election participation.
- IV. REMINDER: You can find detailed instructions for creating/copying Election Plans, Setting up Elections (including adding contests & candidates), and completing data quality tasks on the WisVote Learning Center website (<http://www.electiontraining.gab.wi.gov/>).