



SVRS Election Checklist I: Inheriting and Setting-Up Election

2014 Fall Partisan Primary Election

August 12, 2014

This checklist covers the following for the 2014 Fall Partisan Primary Election:

- ✓ Inheriting election
- ✓ County election setup tasks, including specific contest setup instructions
- ✓ Municipal election setup tasks
- ✓ Voter data quality maintenance (ensuring accurate poll books)
- ✓ **NEW: Legislative changes and POR review**

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

All counties and municipalities should inherit the 2014 Fall Partisan Primary Election.

COUNTY LEVEL TASKS FOR ELECTION SETUP

Tasks To Complete	Explanation
<input type="checkbox"/> Step 1: Inherit the 2014 Fall Partisan Primary Election	<p>The G.A.B. has created the 2014 Fall Partisan Primary Election. All counties need to inherit the election.</p> <p style="text-align: right;"><i>SVRS Manual: Election Setup, page 4</i></p>
<input type="checkbox"/> Step 2: Check Milestone #2	<p>Milestone #1 is automatically checked when the election is inherited. Checking Milestone #2 allows you to enter county contests and candidates.</p>
Counties should inherit and check Milestone #2 for their Relier communities.	
<input type="checkbox"/> Step 3: Run the Pre-Canvass Reporting Unit List and Reporting Unit Exception Reports	<p>These reports are in found the G.A.B. Canvass Reporting System.</p> <p>Counties and municipalities must communicate with each other to ensure the Reporting Unit Plan selected for the 2014 Fall Partisan Primary Election in SVRS <u>matches</u> the programming established for the electronic voting equipment. <u>Failure to do so will complicate the canvass reporting process.</u></p> <p style="text-align: right;"><i>SVRS Manual: Canvass, pages 4-6</i></p>
<input type="checkbox"/> Step 4: Enter contests and candidates	<p>Counties must enter all county level contests, as well as candidates, in order for UOCAVA voters to receive a complete absentee ballot on the MyVote website (myvote.wi.gov).</p> <p>Each office requires three contest entries in SVRS for the 2014 Fall Partisan Primary Election: Democratic, Republican, Constitution.</p> <p><i>*Please see page two for examples on how you must set up contest name, contest description and the contest numbering.</i></p> <p style="text-align: right;"><i>SVRS Manual: Election Setup, pages 15 -26 (22-26 are optional).</i></p> <p style="text-align: right;"><i>*Please pay particular attention to the <u>August Partisan Primary Numbering Scheme for Ballot Positions chart on page 17.</u></i></p>

Contest - Add -

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

General Candidates Districts Documents

Contest For/Against Referendum Owner: ADAMS COUNTY

Election: 2014 FALL PARTISAN PRIMARY

Office Position: ADAMS COUNTY SHERIFF Jurisdiction Level: State

Description: ADAMS COUNTY SHERIFF - DEMOCRATIC #1
ADAMS COUNTY SHERIFF DEMOCRATIC - VOTE FOR ONE

Ballot Instructions: VOTE FOR ONE #2

Ballot Position: 5000 #3

Contest Options

No of Seats: 1

Federal Office Running Mate Allowed Write-Ins Allowed

#1 - There are 3 contests for every office on the ballot - One for each party with ballot access (Democratic, Republican, Constitution). Each individual party name **must** be entered as part of the contest description.

#2 - Ballot Instructions must read **VOTE FOR ONE**.

#3 - You **must** use the August Partisan Primary Number Scheme for Ballot Positions Chart (see below) to determine the Ballot Position.

August Partisan Primary Numbering Scheme for Ballot Positions in SVRS:

For the August Partisan primary, contests are grouped by party, so all offices for one party need to come before any offices for the next party. The order for the 2014 Partisan Primary is based on the 2012 Presidential Election.

First Place Party, State Contests:	001000 - 004999
First Place Party, County Contests:	005000 - 009999
Second Place Party, State Contests:	010000 - 014999
Second Place Party, County Contests:	015000 - 019999
Third Place Party, State Contests:	020000 - 024999
Third Place Party, County Contests:	025000 - 029999
Fourth Place Party, State Contests:	030000 - 034999
Fourth Place Party, County Contests:	035000 - 039999
Fifth Place Party, State Contests:	040000 - 044999
Fifth Place Party, County Contests:	045000 - 049999

For the 2014 Fall Partisan Primary Election, the contests should be setup as follows:

First Place Party (County) = Democratic

Second Place Party (County) = Republican

Third Place Party (County) = Constitution

All three parties need to be added to all County contests regardless of whether a candidate is running for each party or not.

Jurisdiction	Office Position	Contest Description	Ballot Position	Contest Long Description
County	ADAMS COUNTY SHERIFF	ADAMS COUNTY SHERIFF DEMOCRATIC	5000	ADAMS COUNTY SHERIFF - DEMOCRATIC - VOTE FOR ONE
County	ADAMS COUNTY SHERIFF	ADAMS COUNTY SHERIFF REPUBLICAN	15000	ADAMS COUNTY SHERIFF - REPUBLICAN - VOTE FOR ONE
County	ADAMS COUNTY SHERIFF	ADAMS COUNTY SHERIFF CONSTITUTION	25000	ADAMS COUNTY SHERIFF - CONSTITUTION - VOTE FOR ONE

After you set up the contests, this is how they should appear in the Contest node in SVRS.

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 that have occurred since the last election to the G.A.B. on Form GAB-100. This helps ensure voters are correctly districted and vote the correct ballot in the Fall Partisan Primary Election.
<input type="checkbox"/> Step 2: Review and select 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 and select 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 Partisan Primary results. <i>SVRS Manual: Election Setup, page 8</i>
<p>In SVRS, be sure the Polling Place Assignment Plan matches the Reporting Unit Plan. Also, the Reporting Units you choose in SVRS <u>must match</u> the programming of your Reporting Units for your electronic voting equipment. <u>Verify this with your County.</u></p> <p>NEW: 2013 Wisconsin Act 155 allows municipalities with populations of over 35,000 to combine election returns with an adjacent ward. The adjacent ward must have a population of 20 or less and the total population of the combined wards cannot exceed that municipality's population range for wards. <u>Please contact the G.A.B. Help Desk at 608-261-2028 if you intend to do this.</u></p> <p>Additionally, each reporting unit for the 2014 Fall Partisan Primary Election must consist of wards in the same Assembly, Senate and Congressional districts. <u>A single reporting unit CANNOT include more than one Assembly, Senate or Congressional district.</u></p>	
<input type="checkbox"/> Step 4: Inherit the 2014 Fall Partisan Primary Election	The G.A.B. has created the 2014 Fall Partisan Primary Election. All municipalities need to inherit the election.
<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; <i>however, most municipalities will not have any local contests to enter for the 2014 Fall Partisan Primary election.</i>
<input type="checkbox"/> Step 6: Begin entering contests and candidates	All contests and candidates will be entered either by the State or County for the 2014 Fall Partisan Primary Election <u>unless your municipality has a special election.</u> <i>SVRS Manual: Election Setup, pages 15 -26 (22-26 are optional).</i> <i>*Please pay particular attention to <u>contest ballot position instructions, page 17.</u></i>

VOTER DATA QUALITY: ENSURING ACCURATE POLL BOOKS

Tasks To Complete	Explanation
<p><u>Mapping</u></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 maintain the quality of the address and district data in SVRS. <u>Completing these tasks will ensure voters have an accurate district combo and will appear correctly in the poll book and receive the correct ballot.</u></p> <p style="text-align: center;"><i>Check and Correct <u>Geocode Exceptions, Geocode Warnings, and Boundary Exceptions</u> from the <u>District Combo Screen</u>.</i></p> <p style="text-align: center;"><i>Check and Correct <u>*DC1</u> voters (*Voters not assigned a District Combo) from the <u>Voter Node</u>. If not corrected, these voters will not appear on your poll book(s).</i></p> <p style="color: red;"><i>NOTE: There were new data quality counts with the SVRS 8.5 release on 9/23/2013. The Mapping Chapter has been updated to reflect these changes.</i></p> <p style="text-align: center;"><i>SVRS Manual: Mapping</i></p>
<p><u>HAVA Matches</u></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.</p> <p>These tasks are required by the federal Help America Vote Act (HAVA) and must be performed by clerks.</p> <p style="text-align: center;"><i>SVRS Manual: HAVA Interfaces, pages 7-19</i></p>
<p><i>The G.A.B. will be monitoring outstanding Mapping and HAVA data quality issues and contacting affected municipalities at the end of May, in anticipation of the June 26, 2014 absentee deadline.</i></p>	
<p><u>Proof or Residence (POR)</u></p>	<p>With the enactment of 2013 Wisconsin Act 182, effective April 4, 2014, POR is required for all registrations. However, there are current, active voter records in SVRS that continue to have the “POR required” that are in need of review.</p> <p>When the “POR required” box reads “Yes” on the voter record, the POR insignia will appear on the poll book.</p> <p>See POR Addendum on Page 5.</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:

Checklist II for the 2014 Fall Partisan Primary - Generating Ballot Styles and Checking Milestone #4

- Checklist II will be posted when the G.A.B. sends the Type B notice information and certification of candidates to county clerks for the Partisan Primary.

ADDENDUM

Proof of Residency

There are Active voter records in SVRS, which are marked as required to show proof of residence (“POR required”). Some of these voters may be in your municipality. When the “POR Required” box in SVRS reads “Yes”, the POR watermark will appear under the signature box on the poll book. You can obtain a list of voters marked “POR Required” by printing the Voter Listing using the Voter Listing with Districts Report.

For detailed instructions on how to print this report, please refer to the SVRS Manual, Voter Chapter: Pages 29-30. **It is very important to use the first filter pictured on the top of page 30.** Please review these voters in your municipality and verify if these voters do, indeed, still need to provide POR. Below are guidelines and scenarios to help determine whether “POR Required” should be yes or no.

Prior to April 4, 2014, POR was required in the following circumstances and POR should remain “Yes”:

- A new voter to the State of Wisconsin registered by mail during open registration and has not provided POR.
- A new voter to the State of Wisconsin registered via a non-SRD registration drive during open registration and has not provided POR.

Prior to April 4, 2014, POR was NOT required in the following circumstances and POR should be marked as “No”:

- An individual registered to vote in the State of Wisconsin during open registration, and was previously registered and voted in the State of Wisconsin.
- The voter is a military or permanent overseas voter.
- When a voter registered with a Special Registration Deputy for your municipality during open registration.
- On Election Day, a poll worker accepted an incorrect form of POR, and still let the individual register to vote.
- During closed registration, staff accepted an incorrect form of POR from an in-person registrant, and still let the individual register to vote.
- During open registration, an in-person registrant did not provide POR.
- A clerk or poll worker did not write or incorrectly recorded the POR.
- The voter has a HAVA Check non-match and is not otherwise be required to show POR.
- If POR was shown and recorded in SVRS but the “POR Required” field was not updated to “No”.

If you have incorrectly marked a voter with “POR Required” in SVRS, please follow these steps to ensure “POR Required” is removed from the voter’s record and does not appear on the poll book:

1. Go to the Voter node
2. Type in the voter’s name and click search
3. Double click on the voter’s name and bring up their voter record
4. Click on the “Other” tab at the top of the page, under the “Save and Close” button
5. In the middle of the page, next to “POR Required”, select “No” from the drop down
6. Click “Save and Close” at the top of the screen

Please contact the G.A.B. Help Desk at (608) 261-2028 with questions or for further information.

****REMINDER: Any voter applications received on or after April 4, 2014 should NOT be entered into SVRS without POR.****