

# SVRS Webinar Training Series

## “SVRS DATA QUALITY AND REPORTS”

### SVRS DATA QUALITY AND REPORTS: Printing Reports & Maintaining an Accurate Poll List

Wednesday, September 17, 2014

10:00 a.m. – 11:00 a.m.

#### Program Presenters:

Wisconsin Government Accountability Board Staff

- Juanita Borton – SVRS Training Officer
- Michael Nelson – SVRS Training Officer

#### Agenda

- Introduction
- SVRS Reports
  - Report Basics
    - 3 Paths to Printing Reports
    - Report Categories
    - Selecting the Right Report
    - Overview of Filters and Sorts
  - Practical Application – Printing a Voter Listing Report
    - Via the Voter Node
    - Via Reports: Print Reports
    - Via Reports: Create Report
- Reminder: EDR Postcard Verification Process
- Data Maintenance in SVRS
  - Mapping Data Quality
    - DC = 1
    - Geocode Warnings, Geocode Exceptions, Boundary Exceptions, and Geocode DC Mismatch
  - HAVA Interfaces
    - HAVA Checks
    - HAVA Matches

**Summary:** This webinar will feature how to print reports in SVRS, including filtering and sorting for specific data; review of the Election Day Registration Verification Postcards; and steps for ensuring accuracy and data quality of the voter registration list.

# SVRS Reports:

## Reports Basics

### *3 Paths for Printing a Report in SVRS:*

- Via the Voter Node
  - Conduct a search to obtain a list of voters
  - Manipulate the list using sort features and Run Time Customization
  - Set up the report for printing (e.g. add header/footer)
- Via the Reports Node
  - Print Reports
    - Use a “canned” report by selecting the category and report from list provided
    - Set filters and sorts
  - Create Report
    - Set up a new report from scratch, including what fields will be displayed on the report
    - Set filters and sorts
    - Save the custom report to use another time

***Report Categories:*** There are several report categories available through the Reports Node. The most common are Voter (the default category), Elections, and Absentee.

Once the Report Category has been selected, the reports available under the selected category appear in the list below. To determine the best report to suit your needs, use the Commonly Used Data Reports list available in the Reports chapter of the SVRS manual on pages 36-37. The Commonly Used Data Reports list also includes where to find step by step instructions for running a specific report in the SVRS manual.

In addition, attached to this document is a list of the most commonly used reports that includes a list of fields that are included on each report.

### ***Filters and Sort:***

When using the Voter Node to create a voter list, filtering is accomplished by the search parameters used to search for voters. For example: To find all registered voters in the municipality who voted in the last election, use Status: Active (General Tab) and check the last election on the Election Tab.

When using the filter in the Reports Node:

FilterForm

Filter Name: \_\_\_\_\_

RPTView\_AESM\_VoterListing2

And/Or	Field Name	Condition	Value
I			ACTI
*	Sanitary District	Equals	
And	Social Security Number	DoesNotEqual	
And(	State	IsGreaterThan	
Or	State Senate District	IsGreaterThanOrEqualTo	
Or(	Statewide	IsLessThan	
)	Status Code	IsLessThanOrEqualTo	
	Status Reason Code	IsBetween	

Fixed set of options for all reports

Fields vary by reports. Field Names also vary by report (example: Election Date, Elec Date)

Fixed set of options for all reports

Values depend on the selected Field Name. Sometimes there are dropdown lists to choose from and sometimes a value must be typed (example: dates).

Sort using Field Name and Ascending (ASC) or Descending (DESC) order. The top field name will be the primary sort, the second line the secondary, and so on.

Sort

Sort Name \_\_\_\_\_

FieldName	Order
Gov ID Num	ASC
House Number	DESC
House Number Suffix	
JurisdictionID	
LAKE MANAGEMENT DISTRICT DESCRIP...	
Last Name	
MailingAddressLine1a	

Fields vary by reports. Field Names also vary by report (example: Election Date, Elec Date)

Fixed set of options for all reports

# EDR Verification Postcards

## Legislative Update

The legislature recently passed a law requiring clerks and the Government Accountability Board to track and report statistics regarding voter verification postcards that sent to voters registering on Election Day if the election includes a state or federal office, or a statewide referendum.

The first postcard reporting will be for the November 4, 2014 election. The postcards will not be used for any elections in 2015, but will go into effect for all applicable elections beginning in January, 2016.

## Specific Information about Reporting

The statute requires reporting on the following:

- How many postcards were sent
- How many postcards were returned as undeliverable because the voter didn't reside at the address they provided when they registered
- How many voters were inactivated as a result
- How many referrals were made to the District Attorney as a result

Clerks will enter the required information on the WEDC website. The G.A.B. is currently working on developing questions to best capture the information.

Because the questions for WEDCS are still being developed, we can't tell you exactly what they will be. Some examples for why we need to continue working on the data collection form:

- A postcard is returned as undeliverable, but it is a post office error
- A voter moves after the election but before the postcard is received
- An SVRS user made a typographical error to the voter address

The G.A.B. continues to work through all of the possible scenarios that can result in a postcard being undeliverable. These various circumstances continue to inform the development of the WEDCS form.

The G.A.B. is working to make the reporting easier and more automated for the future.

*As we get closer to the election, more detailed training material will be posted.*

# Poll List Maintenance (Data Quality):

## Data Quality Checks

This segment will cover the Data Quality scheduled tasks that were included in the Checklist I and then reviewed again Checklist 2 for the Fall Election. We will go a little more in-depth searching for and correcting the data quality elements.

If you need refresher training on mapping there is an excellent Webinar: SVRS: Mapping 8.5 first presented on October 24, 2013 and the SVRS Training Manual.

We encourage you to perform these checks and correct data and records accordingly on a regular basis but it is crucial that these be accomplished in an election cycle before absentee ballots are issued and poll books are printed.

- ***HAVA Matches:***
  - Voter Matches: Death, Felon and Voter (duplicate). The intent of the HAVA matches is to remove the opportunity for fraud and to keep ineligible from voting.
  - HAVA act and Wisconsin Statutes requires that:
    - Deceased voters must be removed from the poll list and by extension must have any applications for an absentee ballot cancelled.
    - Felons that are “still on paper” (under the supervision of the DOC) are ineligible to vote and must be prevented from appearing on the poll book
    - Every voter must only have only one record therefore duplicate records that exist for a single voter must be merged into one record.
  - A judgment call or possibly further investigation on the part clerks is required to confirm matches may be required to confirm or not confirm any matches.
  
- ***Mapping Data Quality:***
  - Geocode Exceptions & Warnings
  - District Combo Mismatches
  - Boundary Exceptions
  - Voters with no District Combo (DC-1)
  - When to contact the GAB
  - The intent is to ensure that all voters have a correct district combo which in SVRS determines their polling place and which ballot they receive on Election Day.

## HAVA Matches

**Death:** SVRS compares the Name, Address and other information that exists in a voter record (Date of Birth, Social Security Number, Driver License Number) with death records from the Department of Health Services (DHS). The instructions for searching for potential death begin on page 9 of the HAVA Interfaces chapter of the SVRS Training Manual.

- **Managing Death Matches:** Compare the data contained in SVRS and the Death Record
  - Choose “Confirmed match” if you are positive that the two records are the same person
    - Confirming a match automatically cancels a voter record with the status reason: “Cancelled-Deceased-Death Record Match”.
    - Check to see if the deceased voter has an absentee application. If so cancel the application and mark any returned ballots for rejection at the polls. No further action is necessary.
  - Choose “Not a Match” if the Person in the voter record and Death record are clearly not the same person. This will prevent SVRS from suggesting a match between these records in the future.
  - Leave the Match Status as “Unconfirmed Match” if you need further investigation to make a definite decision.
  - Save and close after your selection has been made.

**Felon:** SVRS compares the Name, Address and other information that exists in a voter record (Date of Birth, Social Security Number, Driver License Number) with felon records from the Department of Corrections (DOC). The match screen will also contain a separation date that the felon is expected to be released from DOC supervision. The instructions for searching for potential death begin on page 11 of the HAVA Interfaces chapter of the SVRS Training Manual.

- **Managing Felon Matches:** Compare the information contained in the Voter Record with the felon record.
  - Choose “Confirmed Match” if you are positive that the two records are the same person.
    - Confirming a match automatically inactivates a voter record with the status reason: “Inactive-Felony Record Match”. No further action is needed in the voter record; however you must generate the “WI Felon Ineligible Notification Letter” and send it.
  - Choose “Not a Match” if the Person in the voter record and felony record are clearly not the same person. This will prevent SVRS from suggesting a match between these records in the future.
  - Leave the Match Status as “Unconfirmed Match” if you need further investigation to make a definite decision.
  - Contact the GAB if you need further assistance with any “Unconfirmed Matches”.
  - Save and close after your selection has been made.

**Voter:** More appropriately defined as a duplicate voter record. SVRS performs an “Ad Hoc” process comparing the voter records from your municipality with other records throughout the State of Wisconsin and will generate a list of potential matches. This is the same “Ad Hoc” process that SVRS uses to identify potential matches when entering applications. The instructions for searching and managing potential voter matches begin on page 16 of the HAVA Interfaces chapter of the SVRS Training Manual.

- **Managing Voter Matches:** Compare the information contained in the voter record with the duplicate record.
  - Choose “Confirmed Match” if you are positive that the two records are the same person.
  - The two records must be merged following the instructions beginning on page 16 of the SVRS Training Manual
  - Choose “Not a Match” if the voter record and the duplicate record are clearly not the same person. This will prevent SVRS from suggesting a match between these records in the future.
  - Leave the Match Status as “Unconfirmed Match” if you need further investigation to make a definite decision.
  - Save and close after your selection has been made.

The Wisconsin Voter Match Report: This report is helpful if you need a paper copy of your potential matches but it is probably more useful to providers to send to reliers who return and annotate which matches to confirm or not confirm in SVRS. The instructions for completing this report begin on page 8 of the HAVA Interfaces chapter of the SVRS Training Manual.

## Mapping Data Quality Tasks

In SVRS, correcting Mapping Data Quality issues in two different “nodes”.

1. Through the “voter” node for individual addresses. Instructions for correcting individual mapping issues begin on page 13 of the Voter Chapter of the SVRS manual.
2. Through the “Districts Combo” node under the “Districts and Office Types”. This method allows managing all exceptions, warnings and mismatches from within a specific District Combo. Instructions for correcting exceptions begin on page 10 of the Mapping Chapter of the SVRS Training manual.

### *Essential elements of correcting mapping issues:*

- Identifying the mapping issues that have been flagged for attention.
- Finding the correct location of the address on a map through possibly one of the following:
  - Plat maps/city street maps
  - County Land Office
  - Personal Knowledge
  - Use of a County GIS web site.
- Compare the correct location with the location that SVRS has placed the pin.

- Perform one of the following actions:
  - Move the pin to the correct location
  - “Confirm” that the pin is in fact at the correct location.
  - Save your changes

***Correct District Combo 1:***

Voters with no District Combination are voter addresses that SVRS could not assign a district combination. These are assigned a district combo of 1 (DC 1) which is a “holding” district combo that SVRS uses since no district combo of 1 exists. In other words, no ward or split has been assigned to the address. This creates special problems for voters who are assigned a DC 1:

- The voter name will not appear on any poll book.
- A voter (military or overseas) who requests an online ballot through MyVote will not have a ballot issued.
- Any Election Day Registrations that are assigned a DC 1 will record a vote but not credit that vote to any ward within your municipality.

There could be many reasons for a DC-1 the most common reasons are:

1. Wrong address\typographical error was entered on the application and the voter application was approved with the error.
2. The address is not in your municipality.
3. There have been new street additions/names that are not yet in SVRS.
4. SVRS simply cannot assign a Geocode to a specific district combo.

***To Search for Voters assigned a DC 1 from the Voter node:***

1. Highlight the “Voter” node in SVRS.
2. On the Districts tab in the search panel, select 1 from the District Combo dropdown:
3. Click “Search”
4. The data grid will bring up any records assigned a DC 1.

A report can also be generated to search for Voters assigned a DC 1. Instructions start on page 28 of the SVRS Training Manual.

***To Fix Voters with No District Combo from the Voter Node:***

Refer to Page 25 of the Mapping Chapter of the SVRS Training Manual.

***Correct Geocode Exceptions and Warnings, District Como Mismatches and Boundary Exceptions:***

**To Search for Address Geocode Exceptions and Warnings, District Combo Mismatches and Boundary Exceptions from the DC Screen:**

1. On the Menu tree, click the plus (+) by the “Districts and Office Types”.
2. Click the (+) by “Districts”.

3. Click on the “District Combos”. The district combos for the municipality will appear on the grid to the right.
4. Scroll to the right in the grid to find the count of Geocode Exception and Warnings, District Combo Mismatches, and Boundary Exceptions.
5. Double click on a district combo with data quality issues you wish to correct.
6. Click on the mapping tab.
7. Use the Mapping tool Icon(s) to view the questionable addresses.

A report can also be generated to search for these mapping data quality issues. Instructions start on pages 14, 18 and 22 of the SVRS Training Manual.

### **To Correct Address Geocode Exceptions and Warnings, District Combo Mismatches and Boundary Exceptions from the DC Screen:**

Geocode Warnings and Exceptions:

- Refer to Instructions beginning on Page 11 of the Mapping Chapter of the SVRS training Manual.

District Combo Mismatches

- Refer to Instructions beginning on Page 15 of the Mapping Chapter of the SVRS training Manual.

Boundary Exceptions

- Refer to Instructions beginning on Page 20 of the Mapping Chapter of the SVRS training Manual.

**When to contact the GAB:**

- Annexations (GAB Form 100)
- For any addresses that will not validate.

## SVRS Mapping Data Quality (Category: Voter)

Report Name	Best Filter(s)/Sort	If Run At County Level:	Fields on Shown on Report
<b>Boundary Exceptions</b>	Filter not required. <b>Filter by:</b> District Combo Code; Municipality; Street Name; Ward. <b>Sort By:</b> Street using Street Name	Sorted by municipality	Address; Voter Reg. #; Name; Distance From Boundary; Geocode Status; District Combo
<b>Geocode District Combo Mismatch</b>	Filter not required. <b>Filter by:</b> District Combo Code; Municipality; Street Name; Ward. <b>Sort By:</b> Street using Street Name	Sorted by municipality	Address; Voter Reg. #; Name; Geocode Status; Current District Combo; District Combo By Geocode
<b>Geocode Exceptions</b>	Filter not required. <b>Filter by:</b> District Combo Code; Municipality; Street Name; Ward. <b>Sort By:</b> Street using Street Name	Sorted by municipality	Address; Voter Reg. #; Name; District Combo
<b>Geocode Warnings</b>	Filter not required. <b>Filter by:</b> District Combo Code; Municipality; Street Name; Ward. <b>Sort By:</b> Street using Street Name	Sorted by municipality	Address; Voter Reg. #; Name; District Combo
<b>Voters with no District Combo</b>	Does not require a filter.	No records return if run by county	ID Number; Name; Address; Date of Birth

## SVRS HAVA Reports (Category: Voter)

Report Name	Best Filter(s)/Sort	If Run At County Level:	Fields Shown on Report
<b>WI HAVA Check Report</b>	Common ( <i>See Ex. 1</i> ): <b>FILTER:</b> HAVACheckDate; HAVACheckResult. <b>SORT:</b> Name (NameLast, NameFirst)	This report is automatically sorted by municipality and when exported to Excel, each municipality is shown on a separate tab.	First Name; Middle Name; Last Name; Suffix; DOB; DL#; SSN; HAVA Ck Date; HAVA Ck Result; Ward
<b>WI Voter Match Report</b>	Common ( <i>see Ex. 2</i> ): <b>FILTER:</b> MatchStatusCode. <b>SORTS</b> Automatically by MatchType in ascending order	This report is automatically sorted by municipality and when exported to Excel, each municipality is shown on a separate tab.	Match Type; Match Basis; Voter/Match Name; DOB; SSN; Address (with municipality); Ward

## Voter Listings (Category: Voter)

Report Name	Best Filter(s)/ Sort	If Run at County Level	Fields Shown on Report
<b>Voter Listing</b>	Filter by district (e.g. Ward, school district), POR Required Status Code, or District Combo Code		Voter Reg.; Voter Name; Voter Address
<b>Voter Listing with District</b>		Sorted by municipality	Voter Reg.; Voter Name; Voter Address; WARD; CONG (Congressional); SEN (State Senate); ASSM (Assembly); COA (Court of Appeals); MJJ (Multi-Jurisdictional Judge); ALD (Aldermanic); Comm (Common School); Union (School); Unified (School); Sani (Sanitary)
<b>WI Voter Participation</b>	Sorting by Jurisdiction sorts by where the vote was cast, not voter's current jurisdiction	May be sorted by Jurisdiction	Election; Jurisdiction; Voter ID; Voter Name; Voter Address; Ballot Combo (i.e. Ballot Style); Ward
<b>WI Voter Participation – All Voters</b>		May be sorted by Jurisdiction	Election; Jurisdiction; Voter ID; Voter Name; Voter Address; Ballot Combo (i.e. Ballot Style); Ward
<b>WI Voter Participation by Voting Method</b>		May be sorted by Jurisdiction	Election; Jurisdiction; Voter ID; Voter Name; Voter Address; Ballot Combo (i.e. Ballot Style); Ward
<b>Address Span Listing Report (Walking List)</b>	Can be sorted by Street name and other address fields.		Municipality; Odd/Even side of Street; House Range (Number); Pre Directional; Street Name; Type; Post Directional; City/Zip; District Combo; Polling Place Location

## Elections (Category: Elections)

Report Name	Best Filter(s)/Sorts	If Run at County Level	Description
<b>GAB-190 Reconciliation Report</b>	Filter by Election Date	Sorts by municipality and reporting units.	Replicates the GAB-190. This report is not intended to be used to complete your GAB-190. Instead it is merely meant to serve as a guide to see if your numbers are approximately close between what actually happened with the election and what is recorded in SVRS.
<b>Vote County by Voting Method</b>			Provides raw numbers of votes cast at the polls and by absentee

## Absentee Reports (all are Category: Absentee)

Report Name	Best Filter(s)/Sorts - Notes	If Run at County Level	Fields on Report
<b>Absentee Application Listing</b>	Sorts & divides by Application Type. MUST filter by election date and Abs App Status Code = Approved (APR)		ID Number; Name & Address; District Combo; Ballot Type; App. Date; App. Type; App. Source; Ballot Status; Ballot Sent; Ballot Returned; Vote Recorded; Ballot Style; Vote Location
<b>Absentee Application Statistics</b>	Filter by election date to see only a specific election	At county level, sorts by Election (in ascending chronological order) and then by Municipality.	District 1 Code; District Name; Total Approved Applications; Applications with Ballot; Applications without Ballot
<b>Absentee Ballot Listing</b>	Sorts by Election & App. Type. Must be Filtered by Election Date to see only current election. Only shows voters for whom a label has been processed.		ID Number; Name & Address; District Combo; Ballot Type; App. Date; Ballot Sent; Ballot Returned; Vote Recorded; Ballot Style; Vote Loc.; ID Provided; ID Exempt; App Type
<b>WI Absentee Application Ballot Log</b>	Prints a facsimile of the absentee label on the left side of the page	At county level, sorts by Muni. & Election	<b>LEFT SIDE:</b> Voter ID; Mailing ID barcode; App. Type; Vote Location; Name & Address <b>RIGHT SIDE:</b> Ward; App. Received; Ballot Issued; Ballot Returned; Ballot Status; Vote Recorded; Ballot Combo (i.e. Ballot Style)
<b>WI Absentee Application Ballot Log _ALD_WARD</b>	Similar to WI Abs. App. Ballot Log except it is sorted by Aldermanic District and then by Ward AND does not include Ballot Combo	Because of the pre-set sort for this report, attempting to sort by Jurisdiction is not productive.	
<b>CLERKOFF Absentee Label 2x5 Single</b>	May be filtered by date.	Must be run at municipal level	
<b>CLERKOFF Absentee Label 2x5 Double</b>	May be filtered by date	Must be run at municipal level	

Ex. 1

FilterForm

Use Filter Save Save As Delete Clear Close

Filter Name: [ ]

WIHavaCheckView

And/Or	Field Name	Condition	Value
And	StatusCode	Equals	ACTI*
And	HAVACheckDate	IsGreaterThan	01/01/2014
And[	HAVACheckResult	Equals	NOMAT*
Or	HAVACheckResult	Equals	PMAT*
I ]	StatusCode	Equals	ACTI*
*			

Ex. 2

FilterForm

Use Filter Save Save As Delete Clear Close

Filter Name: [ ]

WIVoterMatchesView

And/Or	Field Name	Condition	Value
And	MatchStatusCode	Equals	UNC*
*			