

SVRS Webinar Training Series

“SVRS Overview and Review”

SVRS Overview and Best Practices

Wednesday, January 21, 2015

10:00 a.m. – 11:00 a.m.

Program Presenters:

Wisconsin Government Accountability Board Staff

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

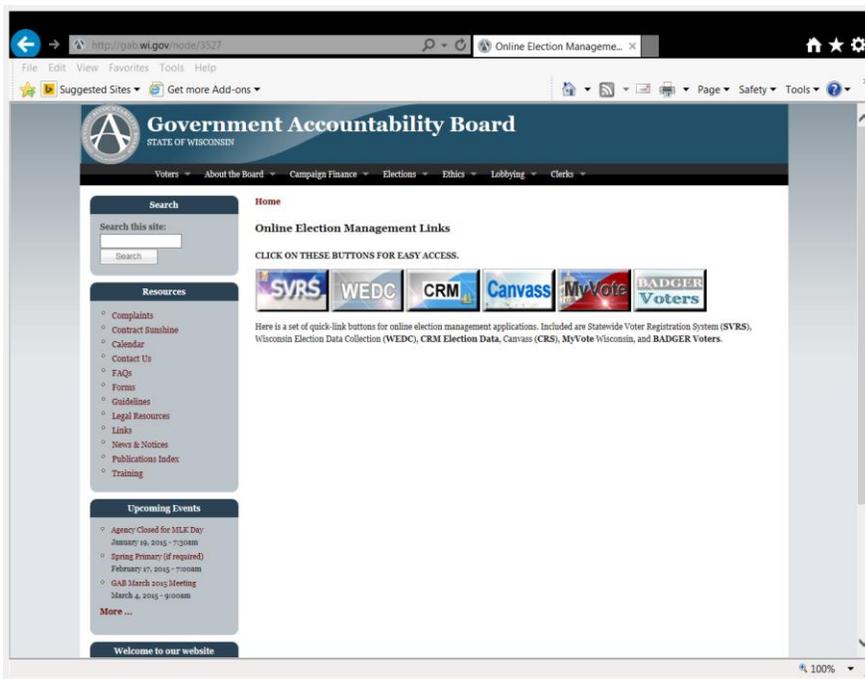
Agenda

- Introduction
- New Online Election Management Links
- Applications & My Vote Wisconsin Voter Applications
- HAVA Interfaces Review
- Mapping Data Quality Review
- Election Set-Up Review
- Absentee Review
- Election Administration Systems Overview

Summary: This webinar will feature an overview of the Election Administrations Systems and the interaction of information from one to another, particularly between MyVote Wisconsin

and SVRS. We will discuss the growing trend of voter applications being completed online, the different types of online applications and best practices for their administration. Also covered will be a review HAVA interfaces and best practices and the best way to review your Mapping Data Quality. Many clerks are beginning to work the 2015 Spring Election so we will review some of the basics of Election set-up but will concentrate on the most critical areas. A brief overview of Absentee and "Absentee Lite" will follow. We will conclude with an overview of Election Systems and information flow between them.

New quick link buttons have been added to the GAB Website to consolidate all of the Election Administration and Data Systems. Once in SVRS you can still access WEDC and Canvass as in the past.



Review and Best Practices of Voter Applications:

GAB 131 entries into SVRS:

With the passage of Wisconsin Act 182, applicants must present an acceptable form of Proof of Residence (POR) regardless of whether the applicant is registering during the open or closed registration period or as an Election Day registration. With one exception, do not enter applications into SVRS unless the applicant has provided POR and it has been recorded properly on the GAB 131. The one exception is for Election Day Registrants who did not provide an acceptable form of POR and voted. Their applications must be entered and approved in SVRS in order to record the vote. They must then be inactivated and the voter notified of the inactivation status and the POR deficiency.

MyVote Wisconsin Online Applications:

Once a resident enters an application online through the MyVote website, the application will fall under one of three application sources depending on the date they were submitted and will show up as a pending application in SVRS. SVRS uses an addressing service to validate the applicants address to a municipality and District Combo.

1. Online Mail
2. Online Late
3. Online Election Day Registration

The screenshot displays the AESM (Application Entry System Manager) interface. The 'Active Jurisdiction' is set to 'CITY OF ALTOONA - 18201'. The search criteria are as follows:

- Last Name: [Empty]
- First Name: [Empty]
- Middle Name: [Empty]
- Date of Birth: [Empty]
- Status Reason: [Empty]
- Application Status: Pending
- Online ID: [Empty]
- Application Type: New Application
- Application Source: Online Mail
- Voter Reg Num: [Empty]
- Date on Application Between: [Empty] and [Empty]
- Last Changed By: [Empty]
- Last Changed Between: [Empty] and [Empty]

Records Returned: 4. Search and Clear buttons are visible.

| Sec Num | Driver's License | Application Status | Application Status Reason | Application Type | Application Source |
|---------|-------------------|--------------------|---------------------------|------------------|----------------------------------|
| | K536-4237-0446-08 | Pending | Online Application | New Application | Online Election Day Registration |
| | M260-4218-7821-09 | Pending | Online Application | New Application | Online Election Day Registration |
| | T360-6709-6107-16 | Pending | Online Application | New Application | Online Late |
| | W426-0138-9962-05 | Pending | Online Application | New Application | Online Mail |

4 Record(s) returned

Online Mail: This application source is automatically assigned if the MyVote application is submitted during the “open” registration period. A notification is sent to the clerk of the municipality and informing them of what actions are required. Voters are instructed that they may mail in a copy of their registration form with POR providing their mailing is postmarked no later than the last day of “open” registration. Applicants may personally bring their documents to the clerk’s office or with them to their polling place on Election Day.

Online Late: This application source is automatically assigned if the MyVote application is submitted during the “closed” registration period. A notification is sent to the clerk of the municipality informing them of what action is required. Online late applicants may not submit their applications and POR by mail. They are instructed to print and hand-deliver their voter application form to the clerk’s office with POR or bring the documents with them to the polling place on Election Day.

Online Election Day Registration: This application source is automatically assigned if the MyVote application is submitted after the “closed” registration period thru Election Day. A notification is sent to the clerk of the municipality informing them of what action is required if any. Online Election Day Registrations cannot be mailed or submitted but must be brought to the polling place on Election Day.

Advantages to approving pending MyVote applications as opposed to manual entry.

- With the exception of POR, the applicant had completed the data entry for you resulting in fewer data entry errors.
- Addresses have already been validated. This is especially important for Online Election Day Registrations to minimize voters going to the wrong polling place and the error is not caught until the paperwork is returned to the clerk’s office for data entry.
- Online Election Day Registrations will automatically have a vote recorded when approved like other Election Day registrations.

Disadvantages to pending MyVote voter applications:

- A substantial number of applicants never send in or deliver their completed hard copy applications with POR, or submit multiple applications.

Best Practices for Pending MyVote voter applications:

- Process the pending application rather than manually entering another application for the same voter.
- Review pending applications on a regular basis. The Government Accountability Board recommends that you delete applications over 30 days old where the applicant has failed to return hard copy documents as required.

HAVA Interfaces:

HAVA Matches:

SVRS “Voter Match Node” is the place where clerks go to perform three important tasks, each of which is required by HAVA. They are 1) Death Matches; 2) Felon Matches; and 3) Duplicate Voter Matches.

Best Practices: The Government Accountability Board recommends that clerks regularly check for matches on a monthly basis and more often in the weeks before an election.

Death Matches:

On a monthly basis the Government Accountability Board receives a “death record file” from the Wisconsin Department of Health Services (DHS). This file is compared to SVRS voter records to identify potential matches. Voters who have passed away must have their voter record cancelled. Voters who have passed away and are matched in this process must have their “match status” set as “confirmed match” in SVRS. This will automatically cancel the corresponding voter record.

The screenshot shows the AESM (Training1) application window. The menu bar includes File, Edit, View, Tools, Window, and Help. The toolbar contains icons for home, menu, shortcuts, quick tasks, and active jurisdiction (TOWN OF SUN PRAIRIE). The left sidebar has a menu tree with 'Voter Match' selected. The main area contains search filters for Last Name, First Name, Middle Name, Match Type (set to Death Record), Date of Birth, and Soc Sec Num. Below the filters, it shows 'Records Returned: 42' and a 'Search' button. A table of results is displayed with columns for Match Type, Match Created, Voter Reg Num, Name, Date of Birth, Soc Sec Num, and Gender. The table lists 20 rows of death records.

| Match Type | Match Created | Voter Reg Num | Name | Date of Birth | Soc Sec Num | Gender |
|------------|---------------|---------------|---------------------------|---------------|-------------|--------|
| Deaths | 1/20/2014 | 0000165381 | RIGGLE, RONALD M | 1/1/1900 | 2194 | |
| Deaths | 1/20/2014 | 0000249141 | PETTIBONE, PERCY L | 1/1/1900 | 1183 | |
| Deaths | 1/20/2014 | 0000257453 | WALKER, MADELINE A | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0000966059 | CONCH, ROBERTA ANN | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0000966072 | DERRINGTON, JOSEPH M | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0000966096 | FARNSWORTH, DAMION JOSEPH | 1/1/1900 | 2814 | |
| Deaths | 1/20/2014 | 0000966114 | GALLAGHER, MILDRED MARY | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0000966180 | HETZEL, MICHELLE DENISE | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0000966207 | JUSTUS, MARVIN K | 1/1/1900 | 3818 | |
| Deaths | 1/20/2014 | 0000966228 | LANSING, LORETTA ELLEN | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0000966308 | NORDSTROM, JAMES L | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0000966317 | NEVERDAHL, DENNIS S | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0000966411 | ZORN, JUDY MARIE | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0000966464 | URSUS, SAMUEL L | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0000966477 | VERMEER, HANS B | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0000966480 | WANG, VIOLETTA P | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0000966521 | ZIMBRICH, CANDACE J | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0700250850 | EMBREY, DARREN ELVER | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0700252410 | HOLLEY, LAWRENCE MICHAEL | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0700253560 | JACKSON, JANET K | 1/1/1900 | | |
| Deaths | 1/20/2014 | 0700255180 | LAWTON, GILES A | 1/1/1900 | | |

Felon Matches:

On a monthly basis, the Government Accountability Board receives a file from the Wisconsin Department of Corrections containing the records of felons that are incarcerated or still under post correctional supervision of the department. This file is compared to SVRS voter records to detect any matches. The matching and confirmation process is similar to that of Death Matches.

AESM (Training1)

File Edit View Tools Window Help

Menu Shortcuts Quick Tasks Active Jurisdiction: TOWN OF SUN PRAIRIE ..

Menu

- Welcome to AESM
- Voter
 - Voter Transfers
 - Voter Match**
- Voter Applications
 - Absentee Applications
- Elections
 - Election Workers
- Polling Place Locations
- Contacts
- Payment
- Districts and Office Types
- Calendar
- Reports
- Labels and Mailings
- Scheduler
- Administration

Quick Tasks

Quick Tasks

Last Name: First Name: Middle Name: Unresolved Matches

Match Type: Date of Birth: Soc Sec Num:

Felony Record

Match Status/Reason: Between From Date: and To Date:

Records Returned: 42 Count Only

Drag a column header here to group by that column

| Match Type | Match Created | Voter Reg Num | Name | Date of Birth | Soc Sec Num | Gender | M |
|------------|---------------|---------------|-----------------------|---------------|-------------|--------|----|
| Felons | 1/20/2014 | 000053568 | THOMPSON, TERRI J | | | | Ur |
| Felons | 1/20/2014 | 0000253953 | PENSKE, MILES M | | | | Ur |
| Felons | 1/20/2014 | 0000255141 | BIRCH, JANICE K | | | | Ur |
| Felons | 1/20/2014 | 0000379795 | WALKER, JOHN WAYNE | | | | Ur |
| Felons | 1/20/2014 | 0000380053 | ROWLAND, GINA S | | | | Ur |
| Felons | 1/20/2014 | 0000454887 | JACOBSON, DEVIN H | | | | Ur |
| Felons | 1/20/2014 | 0000507618 | WAYNE, RAQUEL L | | | | Ur |
| Felons | 1/20/2014 | 0000517012 | TRAYNOR, MICAH N | | | | Ur |
| Felons | 1/20/2014 | 0000966009 | AUKLAND, JILL ROSE | | | | Ur |
| Felons | 1/20/2014 | 0000966062 | CRAWLEY, STUART J | | | | Ur |
| Felons | 1/20/2014 | 0000966076 | DOBSON, PAMELA R | | | | Ur |
| Felons | 1/20/2014 | 0000966102 | FREDDO, FRANCIS T | | | | Ur |
| Felons | 1/20/2014 | 0000966113 | GARFIELD, EVAN C | | | | Ur |
| Felons | 1/20/2014 | 0000966188 | VANDELVELDE, JANICE F | | | | Ur |
| Felons | 1/20/2014 | 0000966377 | SCHUTZ, JENNIFER A | | | | Ur |
| Felons | 1/20/2014 | 0000966390 | SPADER, DANIEL T | | | | Ur |
| Felons | 1/20/2014 | 0016080266 | DANSON, JERIMIAH M | | | | Ur |
| Felons | 1/20/2014 | 0700097710 | CRAY, JEFFREY M | | | | Ur |
| Felons | 1/20/2014 | 0700251160 | FREYA, THOMAS A | | | | Ur |
| Felons | 1/20/2014 | 0700260160 | VAN HALEN, EVAN A | | | | Ur |
| Felons | 1/20/2014 | 0700260430 | EGAR, SAMANTHA T | | | | Ur |

Smart Buttons

42 Record(s) returned

Voter Matches:

SVRS uses an Ad Hoc matching process within the application to identify potential duplicate voter records. This is the same Ad Hoc process that SVRS performs when entering a voter application so the potential matches found here are those that were possibly missed when a voter application was entered. If a voter match is confirmed, the two (or more) voter records must be merged in a separate merging process. To merge voter records, refer to Page 16 of the HAVA interfaces chapter of the SVRS Training Manual.

The screenshot shows the AESM (Training1) application window. The menu on the left includes options like 'Welcome to AESM', 'Voter', 'Voter Transfers', 'Voter Match', 'Voter Applications', 'Absentee Applications', 'Elections', 'Election Workers', 'Polling Place Locations', 'Contacts', 'Payment', 'Districts and Office Types', 'Calendar', 'Reports', 'Labels and Mailings', 'Scheduler', and 'Administration'. The search filters at the top include fields for Last Name, First Name, Middle Name, Match Type (set to 'Duplicate Voters'), Date of Birth, Soc Sec Num, Match Status/Reason, and date ranges. The search results table is as follows:

| Match Type | Match Created | Voter Reg Num | Name | Date of Birth | Soc Sec Num | Gender | M. |
|------------|------------------|---------------|------------|------------------------|-------------|--------|----|
| + | Duplicate Voters | 1/20/2014 | 0703957310 | VOELKE, JAMES S | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0712186250 | DANNON, SARAH LEE | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0000966107 | FLUER, RENE R | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0000966121 | GREER, GAVIN C | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0700254320 | JAMES, LORETTA RAE | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0715595350 | BECKETT, MARCUS THOMAS | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0000966336 | PICKERING, KAREN ANN | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0000368636 | AMUNDSON, CARL | 1/1/1900 | 6285 | Un |
| + | Duplicate Voters | 1/20/2014 | 0000966482 | WEAVER, DENNIS P | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0000966315 | THEDA, ANDERS T | 1/1/1900 | 8121 | Un |
| + | Duplicate Voters | 1/20/2014 | 0702286200 | RANSOM, BENTON F | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0000966423 | URICH, ROBERTA AUGUSTA | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0711279560 | NEIGHBORS, GOMER M | 1/1/1900 | 9180 | Un |
| + | Duplicate Voters | 1/20/2014 | 0700260480 | ZOBROWSKI, CRAIG M | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0000966187 | HUMMEL, SCOTT | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0702448430 | LUTHER, TREVOR J | 1/1/1900 | 1664 | Un |
| + | Duplicate Voters | 1/20/2014 | 0000163721 | MAITLAND, CALVIN SEAN | 1/1/1900 | 4850 | Un |
| + | Duplicate Voters | 1/20/2014 | 0708957940 | KRAMER, EDWARD R | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0000966391 | SCHWIMMER, DAVID L | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0000372443 | CLANCEY, DONALD E | 1/1/1900 | | Un |
| + | Duplicate Voters | 1/20/2014 | 0715667510 | DIEGO, LUIS ESTEBAN | 1/1/1900 | | Un |

HAVA Checks:

When a voter application is entered into SVRS, SVRS will communicate with the Wisconsin Department of Transportation and the Social Security Administration on a nightly basis to compare the Name, Date of Birth, Driver License or WI ID number, and Social Security number of the applicant with their databases. Similarly, if any changes are made to the above data fields, SVRS will automatically run another HAVA check. If any of the above data fields are not exactly the same, then the voter will fail the check and it will be the responsibility of the clerk to determine if an error was made in entering data or if the clerk must communicate with the voter via a “DMV Ping Notification Letter”.

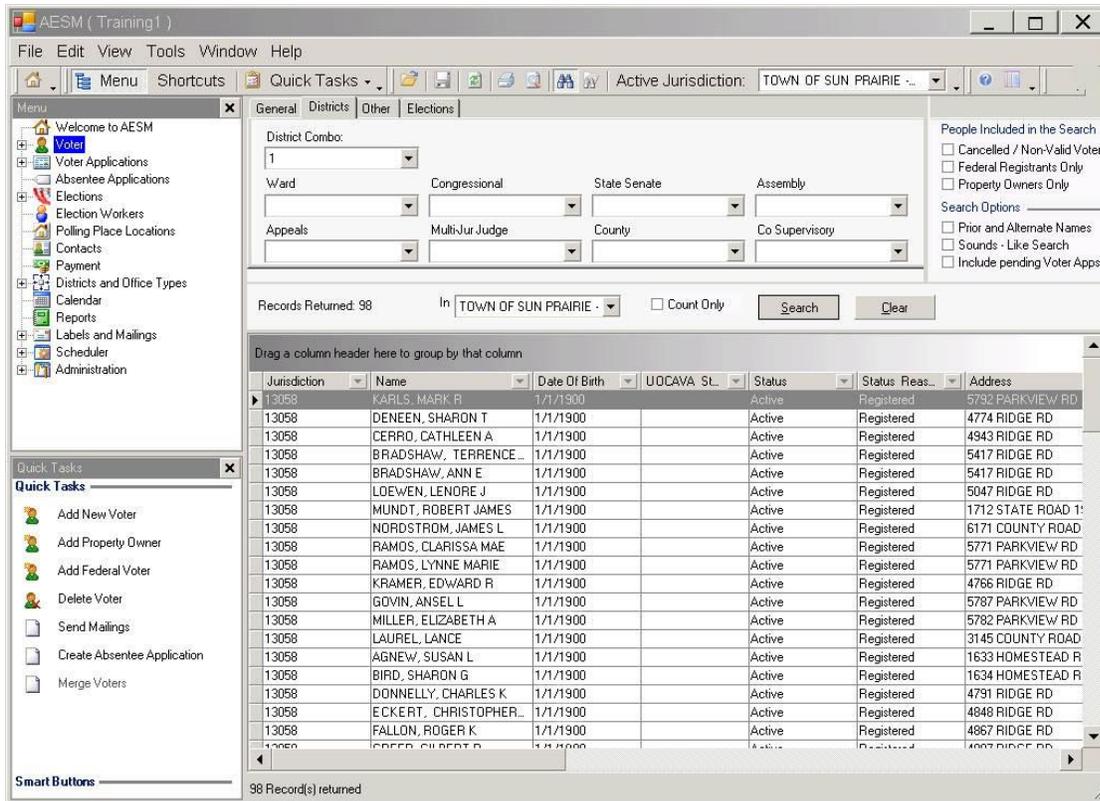
Best Practices: Check for HAVA failures on a regular basis but avoid using a date earlier than the last date checked or run as a report

The screenshot shows the AESM (Training1) application window. The 'General' tab is selected, and the search criteria are set to 'TOWN OF SUN PRAIRIE'. The search results show 24 records returned. The table below is a representation of the data shown in the application.

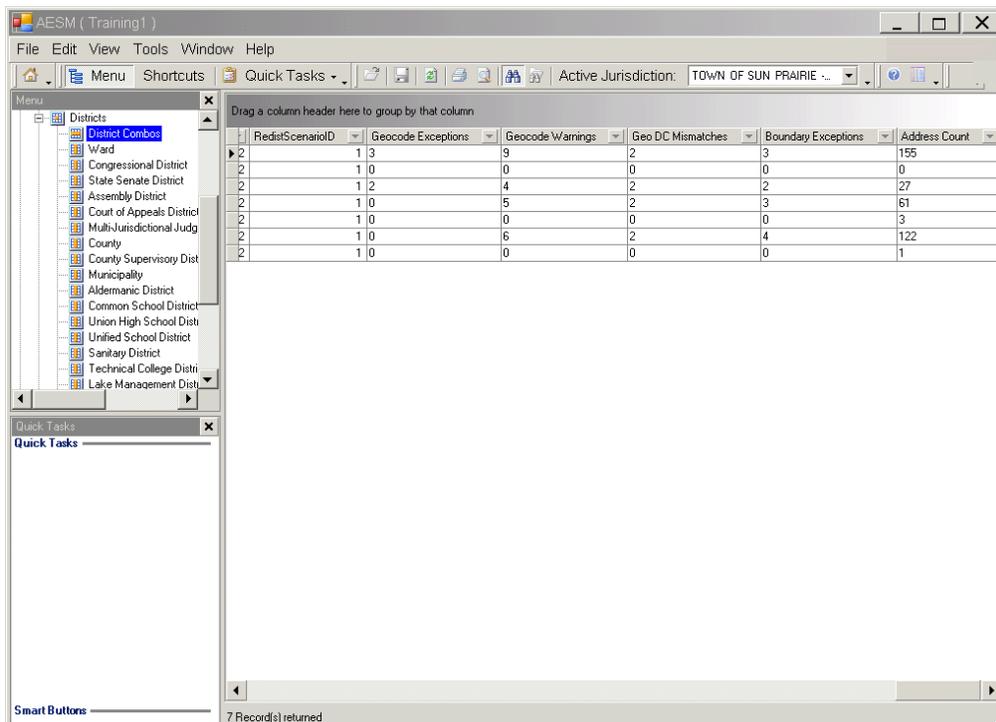
| Jurisdiction | Name | Date Of Birth | UOCAVA Status | Status | Status Reason | Address |
|--------------|--------------------|---------------|---------------|--------|---------------|--------------------------|
| 13058 | THIELE, TERRANCE G | 1/1/1900 | | Active | Registered | 2679 SYLVER RIDGE LN |
| 13058 | DICK, ARTHUR E | 1/1/1900 | | Active | Registered | 6274 TOWN HALL DR |
| 13058 | KLOCK, LINDA MAY | 1/1/1900 | | Active | Registered | 3161 COUNTY ROAD T |
| 13058 | ANDRES, ADAM | 1/1/1900 | | Active | Registered | 4794 BAILEY SETTLEMENT R |
| 13058 | BENTLEY, BUFFORD | 1/1/1900 | | Active | Registered | 4795 BAILEY SETTLEMENT R |
| 13058 | CARRIBOU, CALLOU | 1/1/1900 | | Active | Registered | 4797 BAILEY SETTLEMENT R |
| 13058 | DUNKIN, DENISE | 1/1/1900 | | Active | Registered | 4800 BAILEY SETTLEMENT R |
| 13058 | EDGERTON, ELY | 1/1/1900 | | Active | Registered | 4801 BAILEY SETTLEMENT R |
| 13058 | FORESTER, FRED | 1/1/1900 | | Active | Registered | 4810 BAILEY SETTLEMENT R |
| 13058 | GOODSON, GEOFFREY | 1/1/1900 | | Active | Registered | 4811 BAILEY SETTLEMENT R |
| 13058 | HASKELL, HERMAN | 1/1/1900 | | Active | Registered | 4815 BAILEY SETTLEMENT R |
| 13058 | JUDD, JUDITH | 1/1/1900 | | Active | Registered | 4816 BAILEY SETTLEMENT R |
| 13058 | KIPLING, KERMIT | 1/1/1900 | | Active | Registered | 4822 BAILEY SETTLEMENT R |
| 13058 | LAMBERT, LANE | 1/1/1900 | | Active | Registered | 4828 BAILEY SETTLEMENT R |
| 13058 | MORTIMER, MASON | 1/1/1900 | | Active | Registered | 4829 BAILEY SETTLEMENT R |
| 13058 | NICKLEBY, NATHAN | 1/1/1900 | | Active | Registered | 4832 BAILEY SETTLEMENT R |
| 13058 | PHILIPS, PERRY | 1/1/1900 | | Active | Registered | 4833 BAILEY SETTLEMENT R |
| 13058 | REGIS, RYAN | 1/1/1900 | | Active | Registered | 4836 BAILEY SETTLEMENT R |
| 13058 | SUZUKI, SVEN | 1/1/1900 | | Active | Registered | 4837 BAILEY SETTLEMENT R |
| 13058 | TURNER, TORI | 1/1/1900 | | Active | Registered | 4841 BAILEY SETTLEMENT R |

Mapping Data Quality:

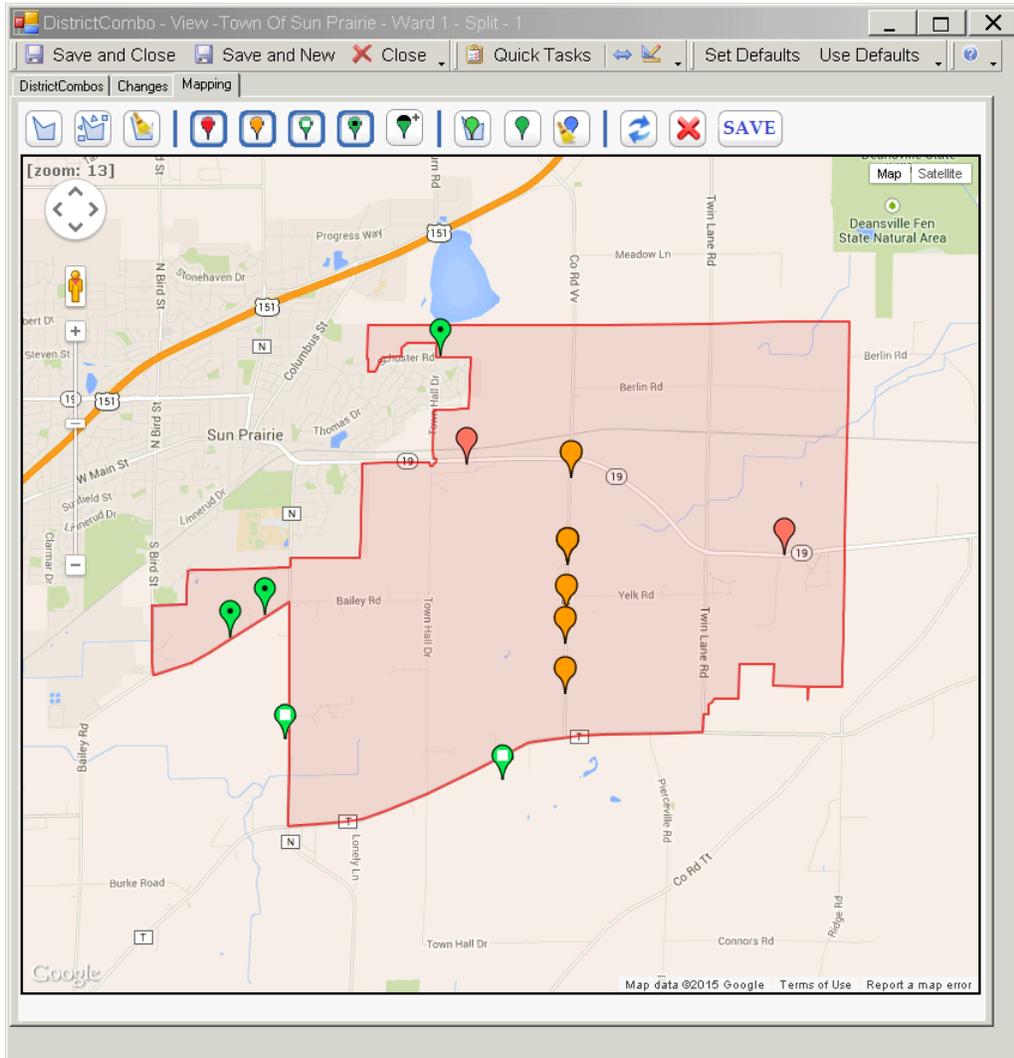
District Combo 1: Of all the Mapping Data Quality checks, checking and correcting voter records who have been assigned a District Combo of 1 (DC1) is the most critical. A District Combo of 1 simply means that SVRS was unable to assign a District Combo to the voter for a variety of reasons. Voter information will not be available to those voters on the MyVote Website and their name will not appear on any poll list. To check for those voters with a DC1, select Active from the "General" tab and "1" from the "Districts" tab in the voter node, then hit search.



Best Practice for correcting Geocode Exceptions, Geocode Warnings, District Combo Mismatches and Boundary Exceptions: You may run reports from the reports node in SVRS, however these Mapping Data Quality issues are best corrected from the district combo map.



Select a District Combo that has map pins to be corrected and bring in the pins by using the mapping tools. Refer to the mapping chapter of the SVRS Training manual and use outside means if necessary such as your local County GIS or land department to determine where each pin belongs.

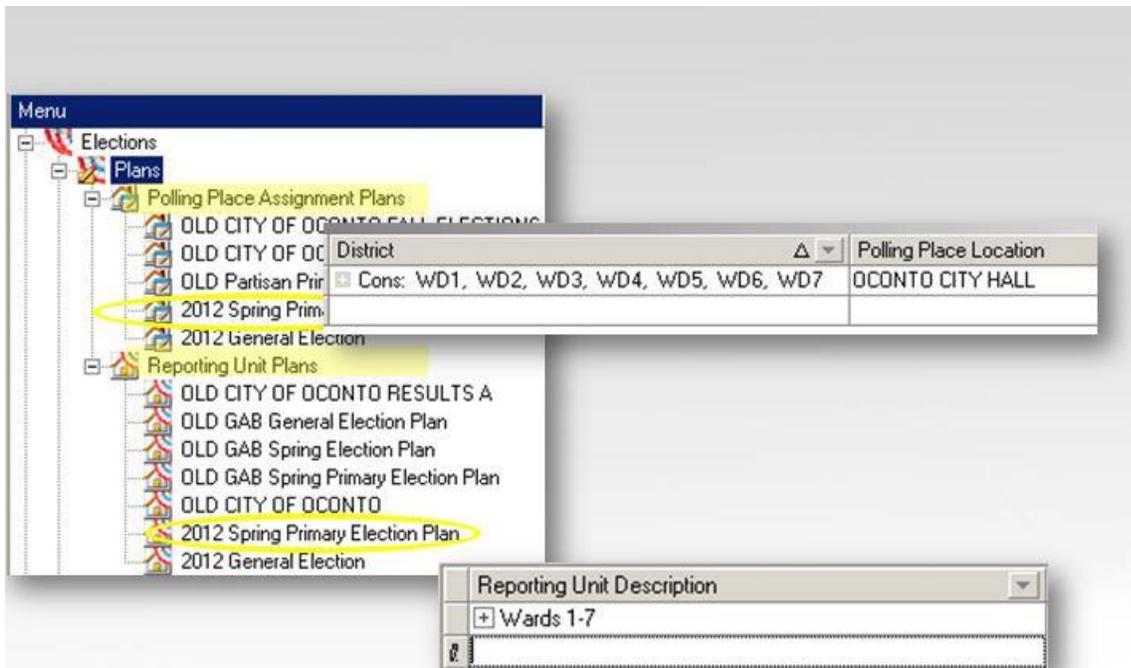


Election Tasks:

Polling Locations:

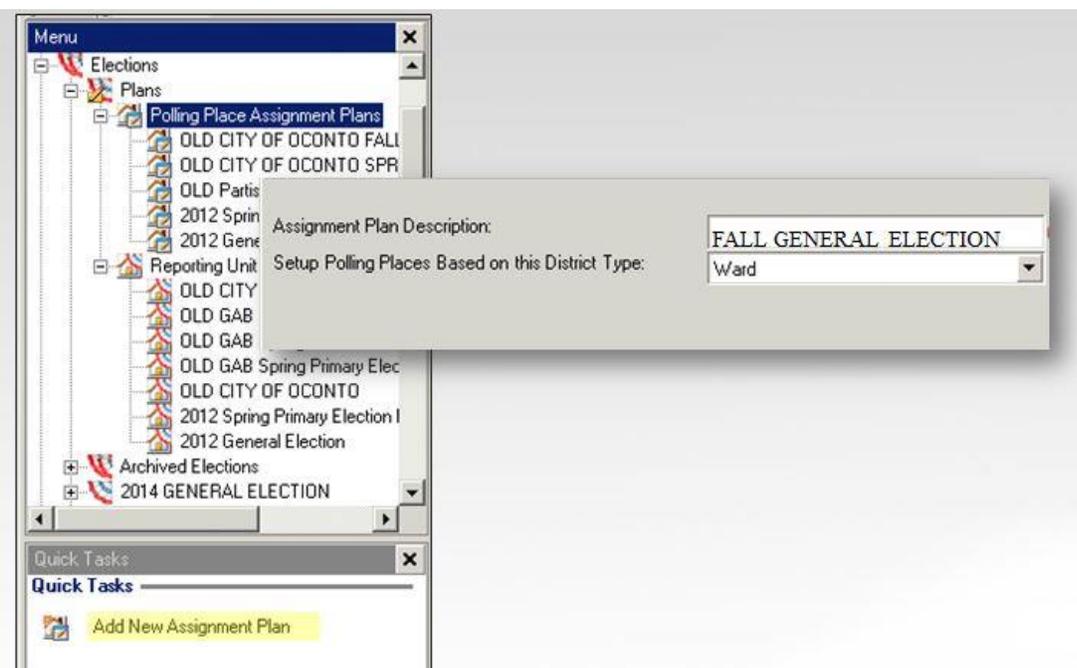
If you have a new polling location, do NOT overwrite an existing polling location. Create a new one.

Check any existing Polling Place Assignment Plans (PPAP) and Reporting Unit Plans (RUP) to see if an existing will meet your needs for the election. PPAPs and RUPs are reusable plans if a new one is not needed.

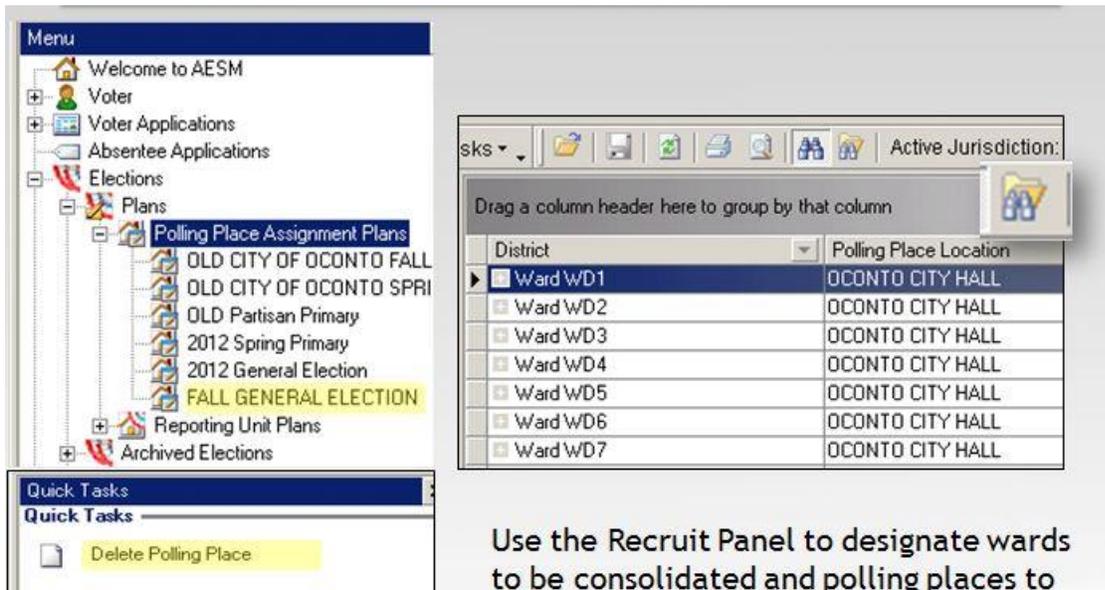


Polling Place Assignment Plan

If a new Polling place is needed follow the “Add New Assignment Plan” beginning on page 2 of the Polling Place Chapter of the SVRS Manual. Once set up, the polling place location is available from the voter record, used within elections, on poll lists and from the MyVote website. First, name the polling place.



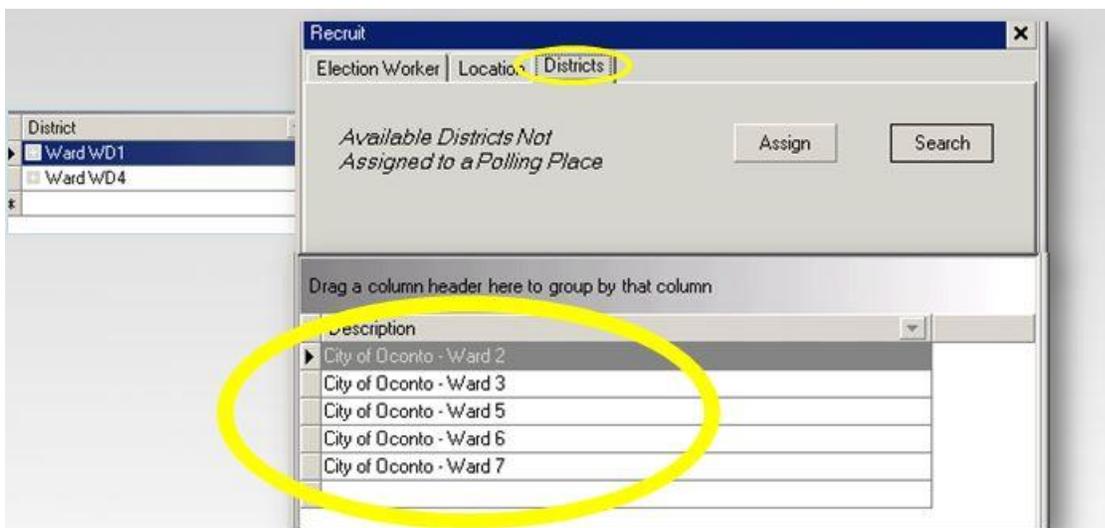
Then use the Recruit Panel to designate the wards that will be using your new polling place.



The screenshot shows the AESM interface. On the left is a 'Menu' tree with 'Polling Place Assignment Plans' selected. Below it is a 'Quick Tasks' section with 'Delete Polling Place' highlighted. On the right is a table with columns 'District' and 'Polling Place Location'. The table contains seven rows, all with 'OCONTO CITY HALL' as the location.

| District | Polling Place Location |
|----------|------------------------|
| Ward WD1 | OCONTO CITY HALL |
| Ward WD2 | OCONTO CITY HALL |
| Ward WD3 | OCONTO CITY HALL |
| Ward WD4 | OCONTO CITY HALL |
| Ward WD5 | OCONTO CITY HALL |
| Ward WD6 | OCONTO CITY HALL |
| Ward WD7 | OCONTO CITY HALL |

Use the Recruit Panel to designate wards to be consolidated and polling places to which the wards are assigned. To open the panel, click the Recruit button at the top of the screen.

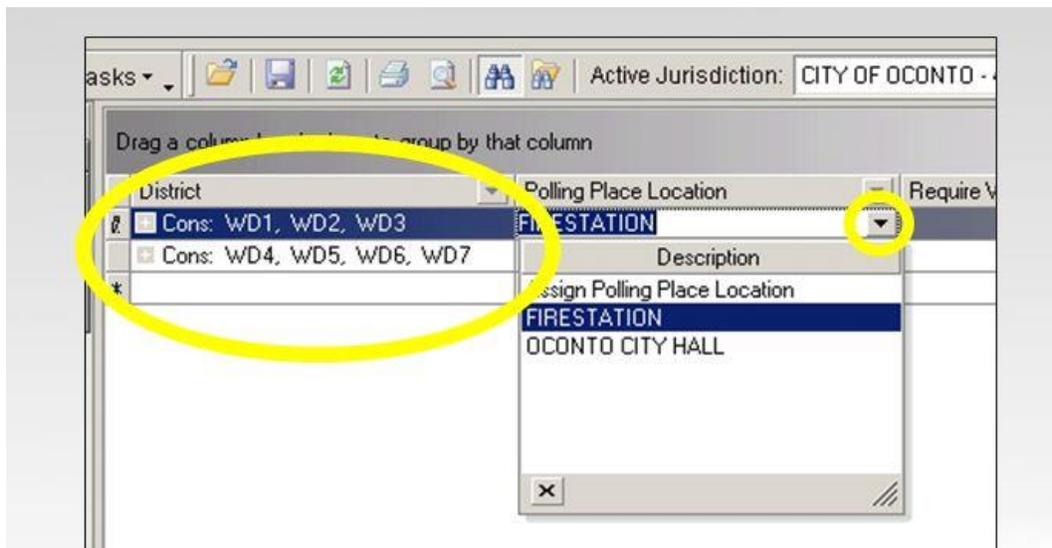


The screenshot shows the 'Recruit' panel. The 'Districts' tab is selected. The panel displays the message 'Available Districts Not Assigned to a Polling Place' and 'Assign' and 'Search' buttons. Below is a table with a 'Description' column. The first row, 'City of Oconto - Ward 2', is circled in yellow.

| Description |
|-------------------------|
| City of Oconto - Ward 2 |
| City of Oconto - Ward 3 |
| City of Oconto - Ward 5 |
| City of Oconto - Ward 6 |
| City of Oconto - Ward 7 |

- Click desired line in PPAP grid detail (e.g. Ward WD1)
- Click ward from recruit panel (e.g. City of Oconto – Ward 2)
- Click Assign

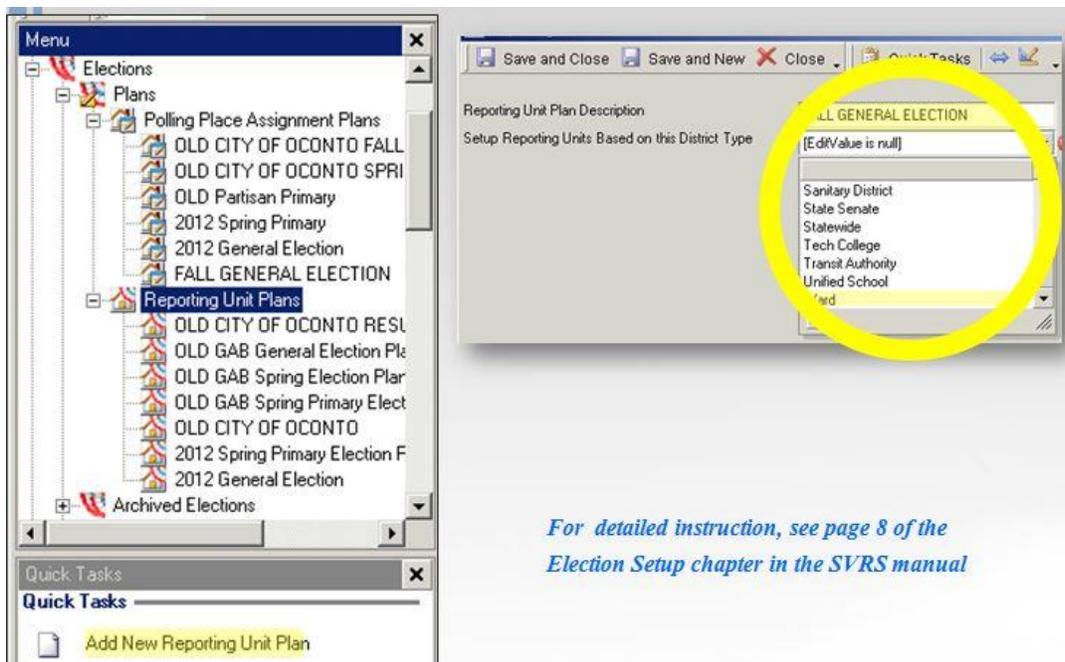
Once districts are assigned you may assign a polling place location for the ward or consolidated wards.



For detailed instruction, see page 4 of the Election Setup chapter in the SVRS manual

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).



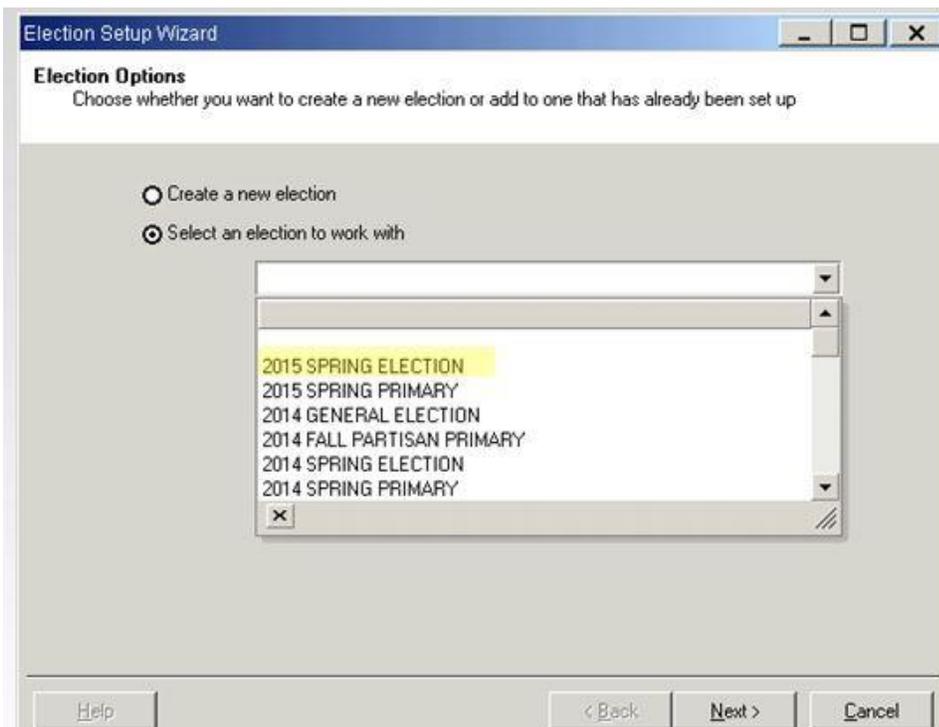
For detailed instruction, see page 8 of the Election Setup chapter in the SVRS manual

Inheriting An Election

Inheriting an Election vs. creating an Election: Always choose to inherit an election if you are able to do so. You must inherit an election if any of the following contests are on the ballot:

- Federal contests
- State contests or referenda
- School District contests or referenda
- Multijurisdictional Judge (MJJ) contests or Sanitary District contests
- County contests or referenda

Elections that are available to be inherited will appear on dropdown menu in the Election Options window of the Election Setup Wizard.



Select the PPAP and RUP for this Election from the dropdown menu then finish the Election Setup Wizard.

Update Election Wizard

Election Details
 Select the type of election from the Election Type drop-down list. Select a Polling Place Assignment Plan and/or a Reporting Unit Plan, if desired.

Election Type: Highest Government Level:

Polling Place Assignment Plan
 Select an optional Polling Place Assignment Plan.

Reporting Unit Plan
 Select an optional Reporting Unit Plan.

Checking Milestones

Make your Election active. Refer to page 14 of the Election Setup chapter of the SVRS Training Manual for complete instructions.

Election - Update - 2015 SPRING ELECTION

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

Election Events Districts Documents

Milestones

Election Milestones are pivotal events during an Election Cycle. Mark off each Milestone as the event is completed.

Drag a column header here to group by that column

| Completed | Election Milestone | Description | Completed.. | Completed.. |
|-------------------------------------|----------------------------|---|-------------|-------------|
| <input checked="" type="checkbox"/> | Election Setup | Basic Election Setup complete; Election is scheduled | 1/13/2015 | bortoj |
| <input checked="" type="checkbox"/> | Election Active | Election Cycle has begun | | |
| <input type="checkbox"/> | Ballot Setup Finalized | All Contests are setup; Ballot Style can be generated | | |
| <input type="checkbox"/> | Ballot Styles Finalized | Specifies that ballot styles have been created | | |
| <input type="checkbox"/> | Poll Books Printed | Poll book printing is completed for the election | | |
| <input type="checkbox"/> | Election Results Finalized | All Election results entered and completed for the electi.. | | |
| <input type="checkbox"/> | Payments Complete | All Payments entered and completed for the election. | | |
| <input type="checkbox"/> | Election Day Closed | Election Day has passed but all history not yet recorded. | | |
| <input type="checkbox"/> | Election Finalized | All election tasks are completed; election is closed | | |

Election Events

Drag a column header here to group by that column

| Completed | Event Description | Event Date | Major Event | Completed.. |
|-----------|-------------------|------------|-------------|-------------|
| | | | | |

Entering Contests and Candidates

- Contests
 - State adds all Federal, State, School Board, MJJ, and sanitary contests
 - When entering a contest into the election, be sure to use the correct Ballot Position for the contest
- Candidates
 - Create a new contact record for the candidate and select Candidate as the type (see the Contacts section of the SVRS Manual)
 - Add a candidate filing under the election
 - Select the contest
 - Enter the correct Ballot Position as below

| Office Contests Numbering Scheme for Ballot Positions in SVRS: | Referenda Numbering Scheme for Ballot Positions in SVRS: |
|---|---|
| State: 001000 - 099999 | State: 700000 - 709999 |
| County: 100000 - 199999 | County: 710000 - 719999 |
| Multi-Jurisdictional Judge: 200000 - 299999 | Multi-Jurisdictional Judge: 720000 - 729999 |
| Municipality: 300000 - 399999 | Municipality: 730000 - 739999 |
| Union/Unified School District: 400000 - 499999 | Union/ Unified School District: 800000 - 899999 |
| Common School District: 500000 - 599999 | Common School District: 900000 - 969999 |
| Special District: 600000 - 699999 | Special District: 970000 - 999999 |

- Assign a number within the range allotted for your jurisdiction; double check your digits—there should be SIX!
- Assign numbers in the order the contest should appear on the ballot (low to high)
- Leave some space between numbers

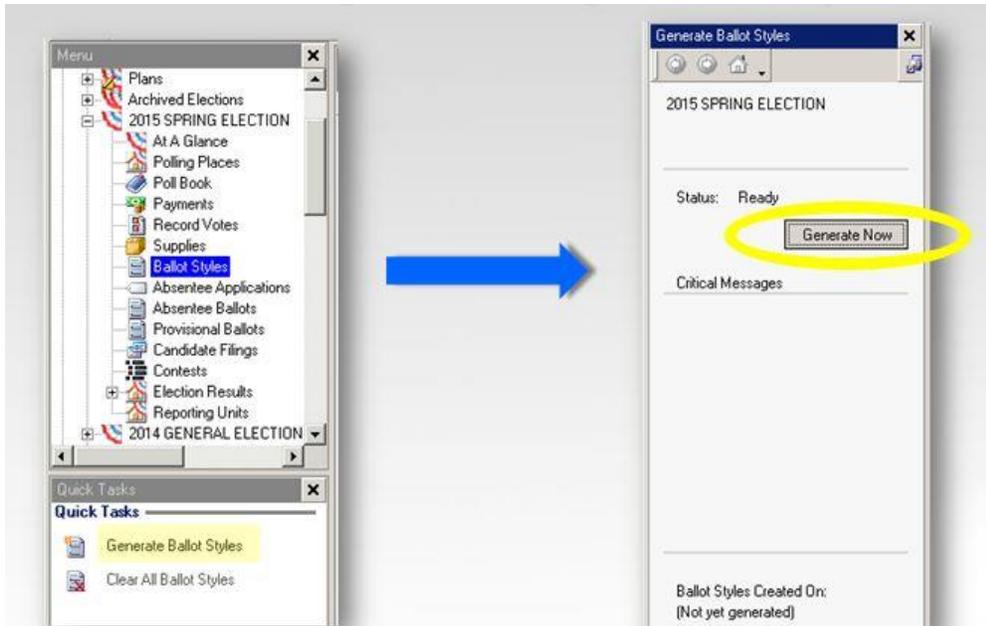
For detailed instruction, see page 17 of the Election Setup chapter in the SVRS manual

Enter the Ballot Position for the candidate that was determined by random selection (flip a coin, draw cards, draw numbers from a hat, etc.) If there is only one candidate enter the number “1

Generating and Naming Ballot Styles

Ballot Style refers to the unique set of Contests and Candidates that will appear on a given voter’s ballot. All voters with this exact same set of Contests and Candidates will have the same Ballot Style in SVRS, regardless of ward. Two voters whose ballots differ by even one Contest will therefore require different Ballot Styles.

Creating a ballot style is a straightforward process in SVRS. However, you must check “milestone 3” indicating that all contests and candidates have been set up before proceeding with generating ballot styles.



The default naming convention for Ballot Styles in SVRS is NP-1, 2, 3, 4 etc. To make it easier for poll workers to issue the correct ballot to voters on Election Day, it is recommended that you rename the default ballot style to something unique for each one. In the below example, ballot styles have been renamed to indicate the color of paper they will be printed on in addition to a brief description. The renamed ballot styles will appear on the poll book with the voter’s name.

| Ballot Style Description | Party |
|------------------------------|--------------|
| + BLUE SCHOOL DISTRICT XYZ | Non-Partisan |
| + YELLOW SCHOOL DISTRICT ABC | Non-Partisan |
| + BEIGE SCHOOL DISTRICTS CDE | Non-Partisan |
| + GREEN SCHOOL DIST FGH | Non-Partisan |
| + PINK NO SCHOOLS | Non-Partisan |
| + GOLD NO SCHOOLS | Non-Partisan |
| + TEAL SCHOOL DISTRICT MNO | Non-Partisan |

Printing Poll Books

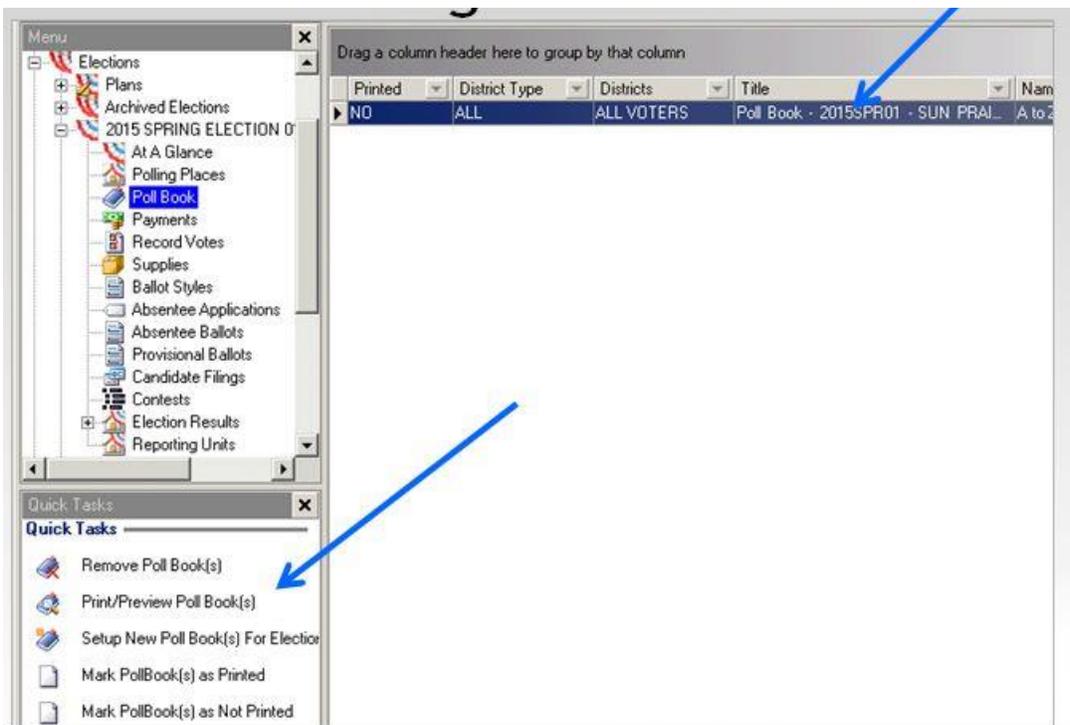
Setup the poll book(s). (Instructions for this step begin on page 4 of the Poll Book chapter of the SVRS Manual.)

- The next step is to print the poll book
- Print directly to a default printer
- Print to a specific printer
- Export the file as a pdf

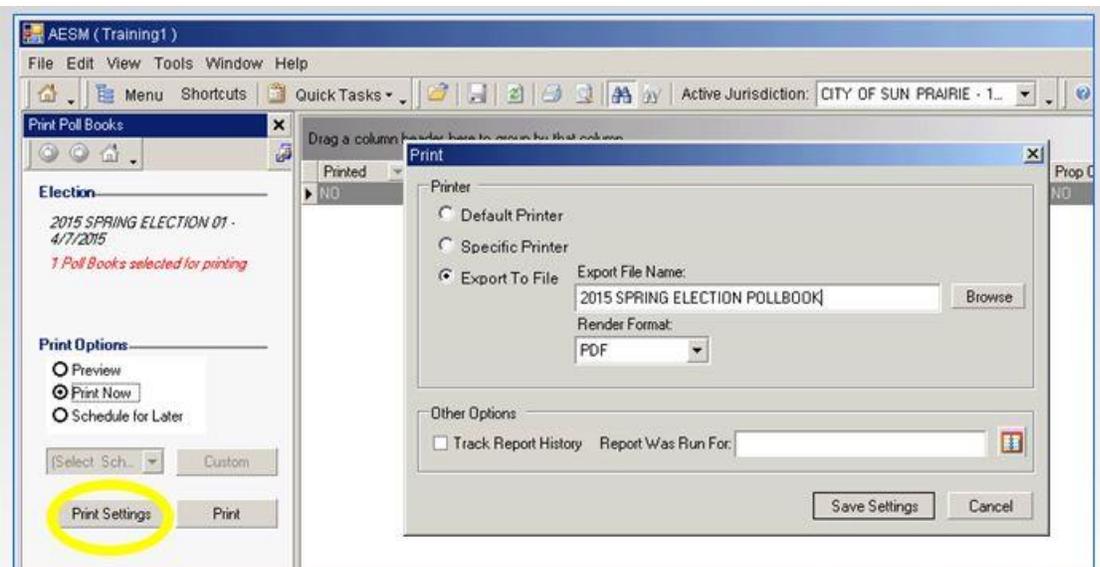
Scheduling the poll book to print later

Note: Review the checklist on page 7 of the Poll Book chapter of the SVRS Manual before printing your poll book!!

Select the poll book that you want to print then select “Print/Preview Poll Book(s).



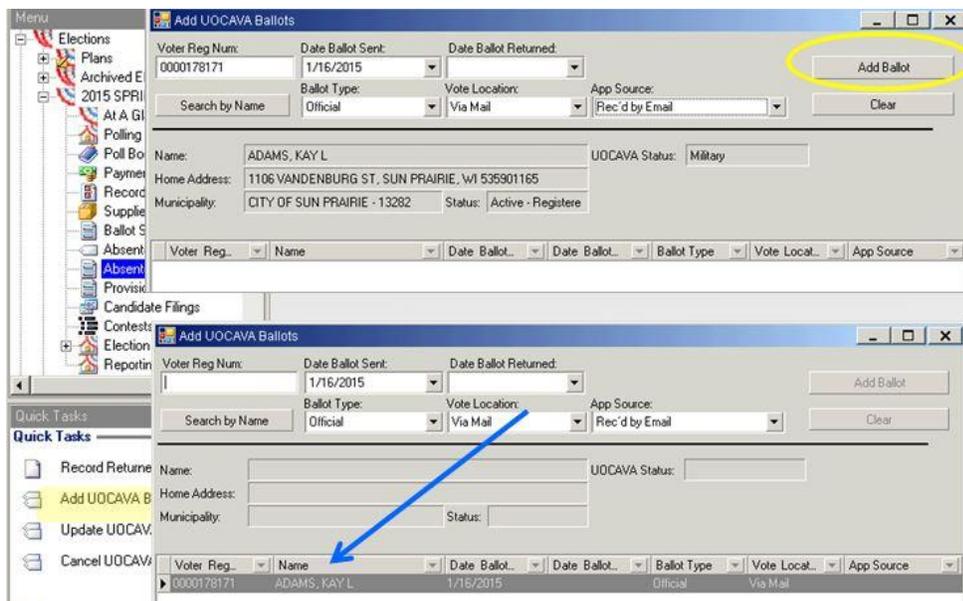
It is best practice to export your poll list before printing it. This means you will have an electronic copy of the list saved in a separate location for your records. Also, if you print a list directly, you must print the entire list. If you export a list, you can print only the pages you wish (for example, if you have newly registered voters, you can choose to print only the supplemental portion of the list.)



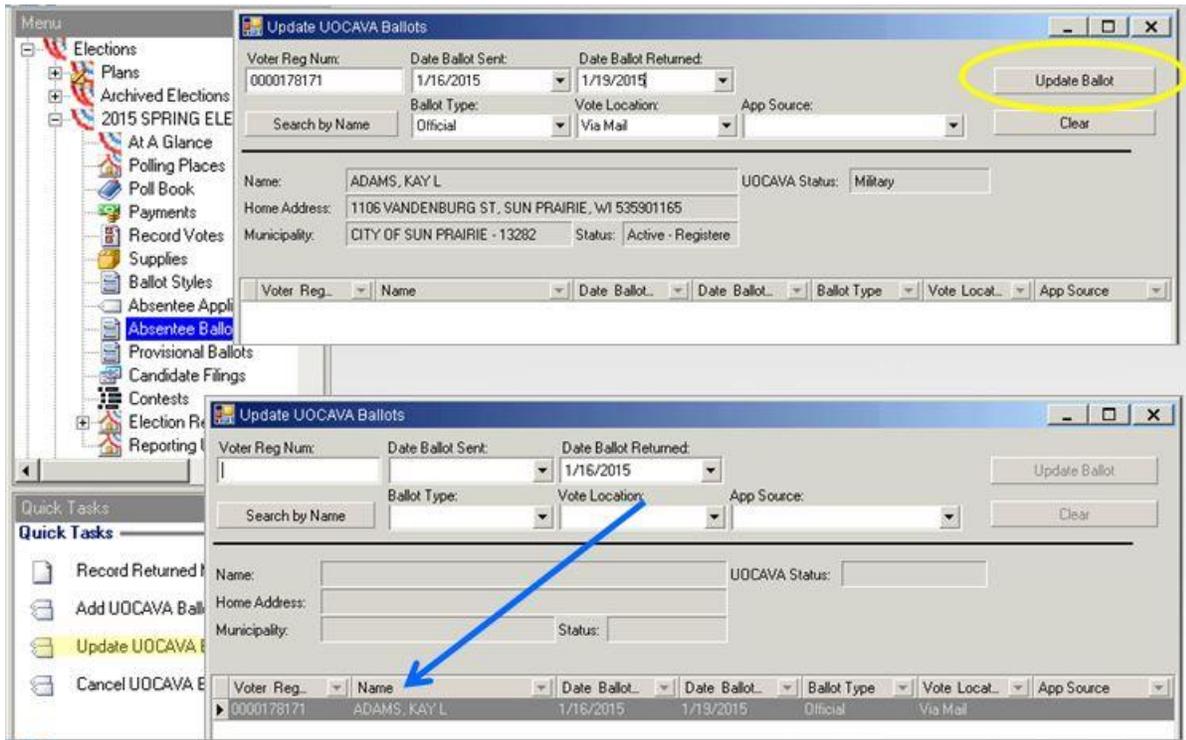
REMINDER: Only 50 records will be displayed in the preview! When previewing the poll book, the Total Number of Voters on the Poll List will only reflect the 50 voters being previewed.

Absentee Voting and the UOCAVA Voter

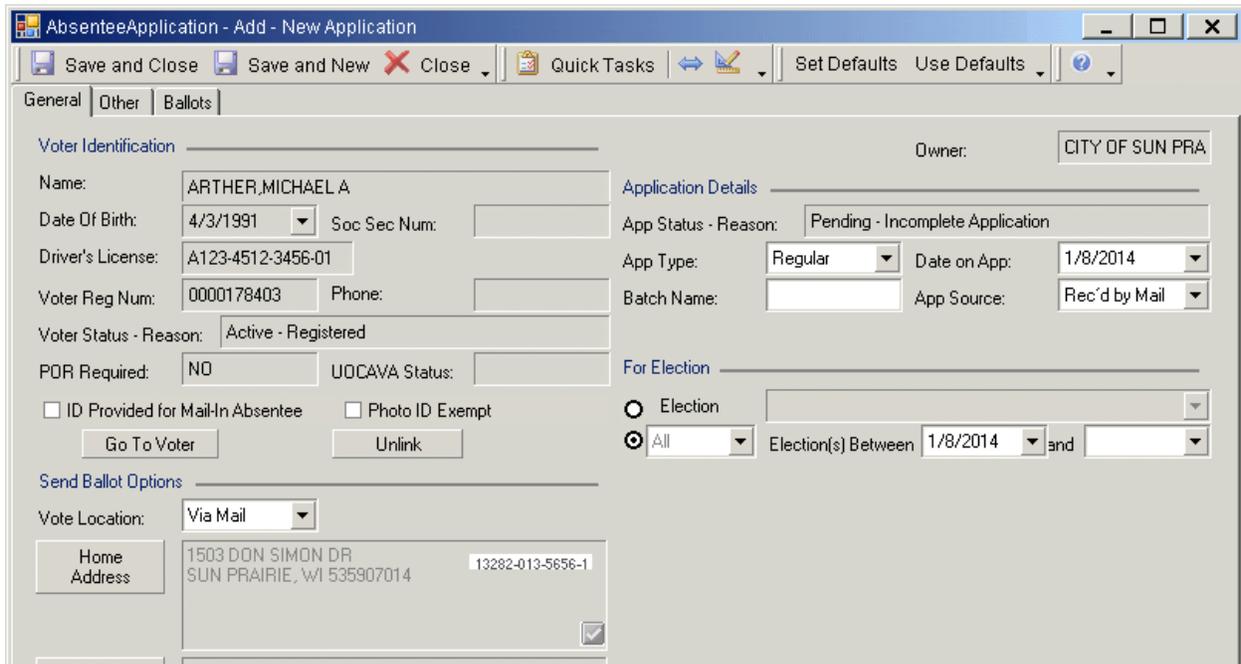
Even if you don't use SVRS for printing labels or tracking absentee ballots, you must still track UOCAVA absentee ballots in SVRS. All absentee requests are limited to the current calendar year unless the voter indicates on their absentee ballot request that they are indefinitely confined due to age, illness, infirmity, or disability. To add a UOCAVA ballot only, select "Add UOCAVA Ballot" from the quick tasks menu. Then search for the voter by name or registration number. Then select "Add Ballot".



UOCAVA ballots must be updated in SVRS if and when they are returned.



Only voters with an "application type" of permanent (indefinitely confined) may have an open ended election request as below.



Systems Directory

