WISVOTE

User Manual

WisVote User Manual - Table of Contents

Chapter 1 – Introduction **Issue Date**

1.1 Accessing WisVote **Jul-16**
License Information
WisVote Certification and Permissions
Log In to WisVote
Password Details

1.2 Navigating WisVote **Sep-9**
Home Navigation Page
Navigation Features
Change User Jurisdiction

1.3 WisVote Learning Center **Jul-16**
Access the WisVote Learning Center
Training Courses

1.4 WisVote Tiles **Jul-16**

1.5 WisVote Advanced Features **Jul-16**
Custom Views/Advanced Find

Chapter 2 – Voter Management

2.1 Voter Search **Jul-16**
Introduction to the Voter Search Page
Search for a Voter by Municipality
Search for a Voter by County
Statewide Voter Search
Count Only Voter Search
Search for a Voter by District
Search for a Voter by Election

2.2 Voter Registration **Jul-16**
Voter Registration Tips
Add a New Voter Registration
Update an Existing Voter Registration
Federal Post Card Application
Confidential Voters
Change a Voter Record to Confidential Status

2.3 Voter Records **Jul-16**
Voter Tile – System Views
View and Export a List of Voters by Type
Photo Identification on File

2.4 Registration List Alerts **Jul-16**
Types of Registration List Alerts
View a Registration List Alert
Decline a Registration List Alert
Accept a Duplicate Alert
Accept a Deceased Alert
Accept a Felon Alert

2.5 DMV Checks **Jul-16**
DMV Checks Tile – System Views
DMV Check Non-Match Reasons
Review a DMV Check
Send a DMV Check Non-Match Letter

Issue Date

Chapter 3 – Absentee Voting

3.1 Types of Absentee Applications..... Oct-13
- Regular Absentee Applications
- Indefinitely Confined Absentee Applications
- Overseas Absentee Applications
- Military Absentee Applications
- Presidential Only Absentee Applications
- Hospitalized Absentee Applications
- Sequestered Juror Absentee Applications

3.2 Add an Absentee Application..... Jul-16
- Add an Absentee Application
- Mail an Absentee Ballot to a Different Address
- Add an In-Person Absentee Application

3.3 Search for an Absentee Application..... Jul-16
- Search for an Absentee Application from the Tile
- Search for an Absentee Application within an Election

3.4 Manage Absentee Applications..... Jul-16
- Five Steps to Managing an Absentee Voter Record
- Cancel an Absentee Application

3.5 Issue Absentee Ballots..... Sep-9
- Issue an Absentee Ballot from an Absentee Application
- Issue an Absentee within an Election
- Issue Multiple Absentee Ballots as a Batch

3.6 Manage Absentee Ballots..... Jul-16
- Search for an Absentee Ballot within an Election
- Reprint an Absentee Ballot Mailing Label
- Cancel and Reissue an Absentee Ballot
- Activate a Canceled Absentee Ballot

3.7 Record Returned Absentee Ballots..... Jul-16
- Record Returned Absentee Ballots by Scan
- Unrecord Returned Absentee Ballots by Scan
- Manually Record Returned Absentee Ballots
- Manually Record Unreturned Absentee Ballots

3.8 Care Facilities..... Jul-16
- Create a Care Facility Record

3.9 Absentee Reports..... Jul-16
- Run an Absentee Report

Chapter 4 – Election Management

4.1 Polling Places..... Jul-16
- Create a Polling Place Record
- Review and Update an Existing Polling Place Record
- Deactivate a Polling Place Record
- Activate an Inactive Polling Place Location
- Create a Polling Place Record Outside of Your Jurisdiction

4.2 Election Plans..... Jul-16
- Election Plan Setup
- Copy an Election Plan

4.3 Poll Books..... Aug-1
- Introduction to Poll Books
- Print a Poll Book
- Print Multiple Poll Books
- Schedule a Poll Book Print

Issue Date
4.4 **Office Positions**..... Jul-16
Add an Elected Official Record
Update an Elected Official Record
4.5 **Election Checkpoints**..... Jul-16

Chapter 5 – Election Setup

5.1 **Create a Special Election**..... Jul-16
Create a Special Election for an Office Position
Create a Special Election for a Referendum
Review Special Election Information
5.2 **Contests**..... Aug-18
Contest Jurisdiction in WisVote
Manual Entry of Contests
Add a Contest for an Office Position
Add a Contest for a Referendum
Create Custom Referendum Answers
Search for, Review and Update a Contest
Contests Complete Checkpoint
5.3 **Candidates**..... Jul-16
Add a Candidate from the Election Information Page
Add a Candidate from the Contest Information Page
Search for, Review and Update a Candidate
Candidates Complete Checkpoint
5.4 **Ballot Styles**..... Aug-1
Exploring the Ballot Style Form Page
Review Ballot Styles
Rename Ballot Styles
Compare Multiple Ballot Styles

Chapter 6 – Post-Election Activities

6.1 **Voter Participation**..... Jul-16
Record Voter Participation by Scan
Record Voter Participation from the Poll Book Grid
Unrecord Voter Participation
Poll Book Votes Recorded Checkpoint
6.2 **Election Day Registration**..... Jul-16
Enter a New EDR
Edit an EDR
EDR Complete Checkpoint
EDR Issues
6.3 **Provisional Ballot Tracking**..... Nov-8
Issue a Provisional Ballot
Enter a Provisional Ballot Record
Update a Provisional Ballot Record
Provisionals Complete Checkpoint

Chapter 7 – Address Management

7.1 **Introduction to Address Management in WisVote**..... Jul-16
Address Management Tiles
Key Terms
Mapping and Address Pins
Navigating Mapping Features

Issue Date
7.2 **Addresses**..... **Jul-16**
Add a New Address
Search for, and Edit an Existing Address
Move the Address Pin to Edit an Address
Address Already Exists in Database
Deactivate an Address
Address Span Report
7.3 **Districts**..... **Jul-16**
District Combinations
Access a District Combination Map
Districts
District Types
Map Icons
Jurisdictions
7.4 **Data Quality**..... **Jul-16**
Types of Address Exceptions
Types of Mapping Problems
Correct a Boundary Exception
Correct a Geocode Exception
Correct a Geocode Warning

Chapter 8 – Election Official Training

8.1 **Clerk Training**.....**Nov-14**
Clerk Training Requirements Clerk
Training Tile – System Views
Enter a Clerk Training Record
Review a Submitted Clerk Training Record
Clerk Training Record Approval
8.2 **Election Worker Training**..... **Jul-16**
Election Worker Tile - System Views
Add a New Election Worker Record
Add an Election Worker Assignment
Add an Election Worker Training Record
Update the Status of an Election Worker
Deactivate an Election Worker Record

1.1 Accessing WisVote

WisVote is a web-based voter registration application system that is accessed directly from an internet browser. The Internet Explorer browser is fully supported by the system and is the recommended browser. Accessing WisVote through other browsers may affect the functionality. However, using Chrome as a secondary browser may be beneficial to troubleshooting. Windows 10's Edge Browser is not validated. Users of Windows 10 system still have Internet Explorer. WisVote Credentials are required to access the WisVote system. **WisVote URL**: https://wisvote.wi.gov

---

License Information

WisVote is different from the former voter registration system, SVRS in that it utilizes what are called Device Client Access Licenses (CALs). The Device CALs are assigned to a device, such as a workstation or laptop, rather than a WisVote user. This makes certification easier as the only files that are needed for a device to use WisVote are the fonts necessary for scanning the barcodes in your poll book.

The Wisconsin Elections Commission has purchased Device CALs at the rate of approximately $250 for each device statewide. To minimize this cost, we ask that WisVote users work on only one computer as the Device CALs will be purchased and assigned to the device.

WisVote Certification and Permissions

In January 2016, the SVRS Provider/Relier relationships and access roles transferred to WisVote. Clerks that have attended SVRS training were automatically assigned the "clerk" role in WisVote and data entry staff continued to have a "data entry" role. A "read only" role was created for users that had "view only" access in SVRS.

WisVote User Roles

- **Data Entry**: this role requires limited training in the general certification program. Users will be certified to enter voter registration applications, record voter participation and track absentee ballots.
- **Clerk:** this role requires complete training in the certification program. Users will receive training on almost all topics related to administering an election. Absentee training is optional
- **Read Only:** this role requires no training but the user must sign a Confidentiality Agreement and the clerk must submit a Request to Add Authorized Users Agreement in order to obtain the correct permissions. Users can view their municipal data in WisVote, but will not have the ability to add, delete or modify information in WisVote

New WisVote Users

New WisVote users will receive WisVote credentials by following our online training and certification program.

1. **Request WisVote Learning Center Access**
   Send an email to elections@wi.gov requesting WisVote Learning Center access for you and/or your staff. The email should be sent at least one business day before access to WisVote is needed and must contain, at a minimum, each staff person's first and last name.

2. **Take WisVote Learning Center Training**
   Log into the WisVote Learning Center and follow the appropriate curriculum checklist. To receive a data entry, data entry + absentee or clerk access role in WisVote, each user must view the demonstration overviews and interactive tutorials listed in the selected curriculum.

3. **Certify Training is Complete and receive WisVote Credentials**
   Fax or email a completed and signed copy of the appropriate WisVote Learning Center Curriculum Checklist and Request to Add Authorized Users form and WisVote Confidentiality Agreement to (608) 267-0500 or elections@wi.gov. Each user must submit a Confidentiality Agreement. The forms are available on both the agency and WisVote Learning Center website.

   Upon receipt of these forms, the Elections Help Desk will create a WisVote user account for you and/or your staff and email you their login credentials.

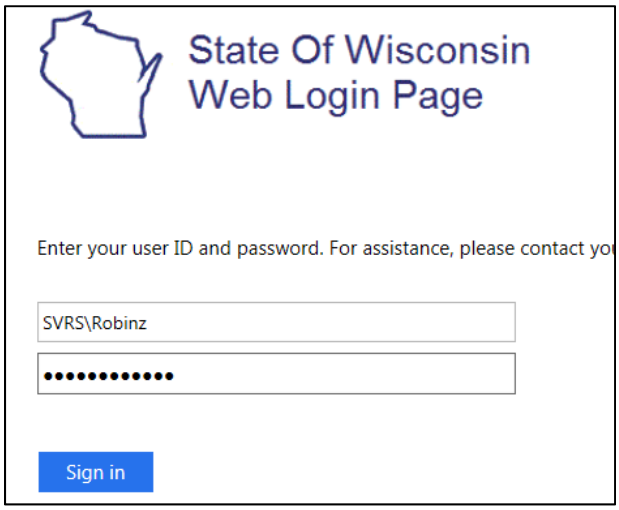
Log In to WisVote

Once a new user has completed the WisVote Certification process, a username and temporary password will be issued.

1. Open the **WisVote URL**: https://wisvote.wi.gov in Internet Explorer

2. Enter the Username and Password
   Note: You must enter "SVRS\" before your username in order to access WisVote

   Username: SVRS\username
   Password: password

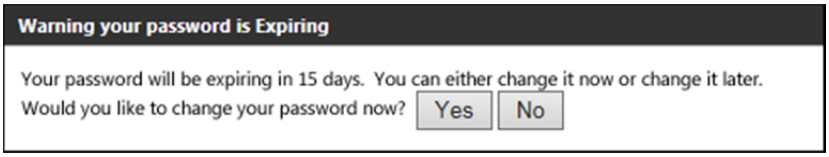


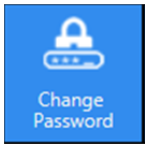
Password Details

After the fourth consecutive failed login attempt your account will be locked. After 20 minutes, the account will automatically unlock and you will get another four tries to login. All new users will be prompted to change the temporary password received with their WisVote credentials the first time login to WisVote.

Your WisVote password will expire every 60 days. The system will not let you repeat the last eight passwords. Fifteen days before the password expires, the Elections Help Desk will send an email to remind you that your password will be expiring soon. A password expiration notification will also show on the banner of the Easy Navigate page.

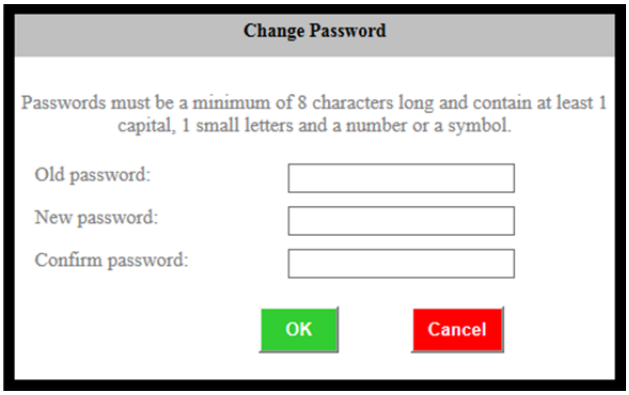
Further emails reminders and WisVote notices will be sent on the tenth, fifth, fourth, third, second and day before your password expires. Select the Yes button to access the Change Password tile. You can change your password at any time by accessing the Change Password tile located on the Easy Navigate page.





To change your password:

1. Enter the current password or the temporary password provided by the Help Desk
2. Enter the new password
3. Confirm the password, click OK



Password Requirements

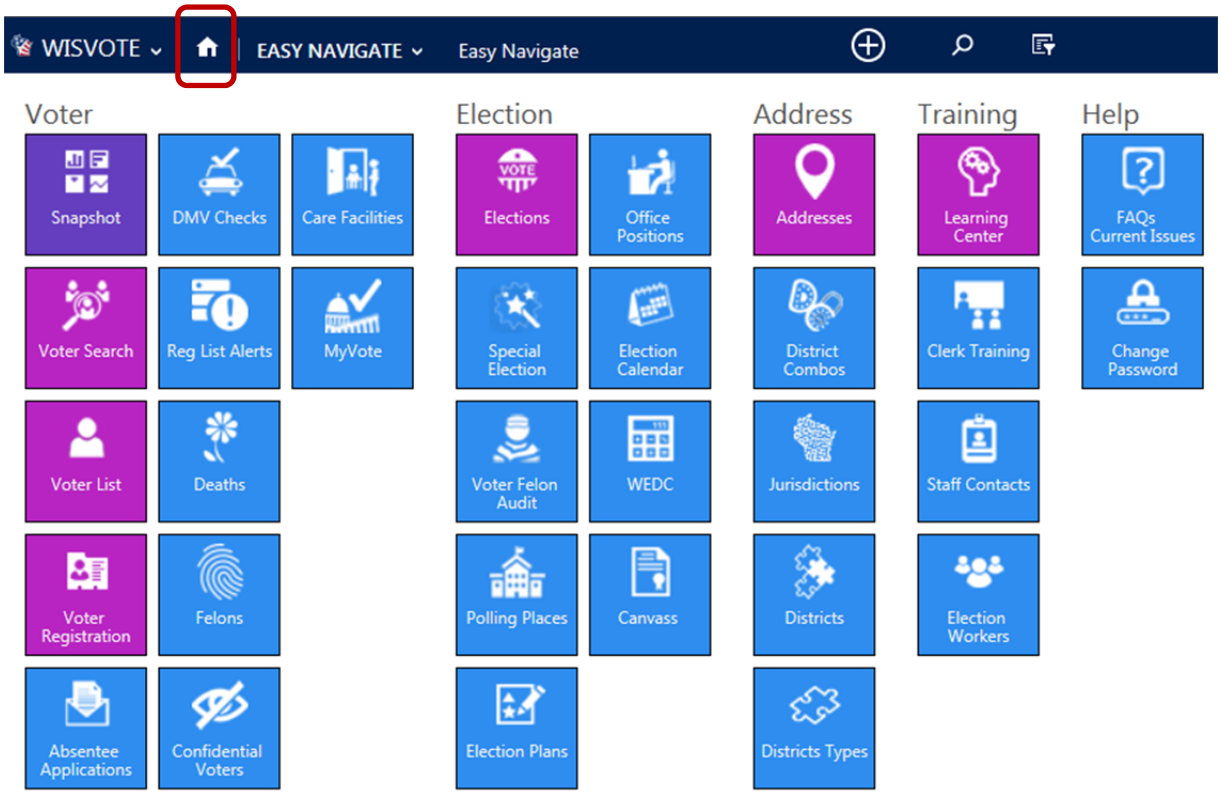
- Passwords must be at least 8 characters in length
- Passwords cannot include the first or last name of the user
- Passwords cannot be the same as the username
- Passwords must contain 3 of the following 4 complexity requirements:
  - Uppercase characters
  - Lowercase characters
  - Numbers
  - Symbols found on the keyboard (such as !, %, #)
    Note: The at sign (@) and period (.) are not permitted characters in a password

For help, contact the Elections Help Desk: 608-261-2028 or Elections@wi.gov.

1.2 Navigating WisVote

Home Navigation Page

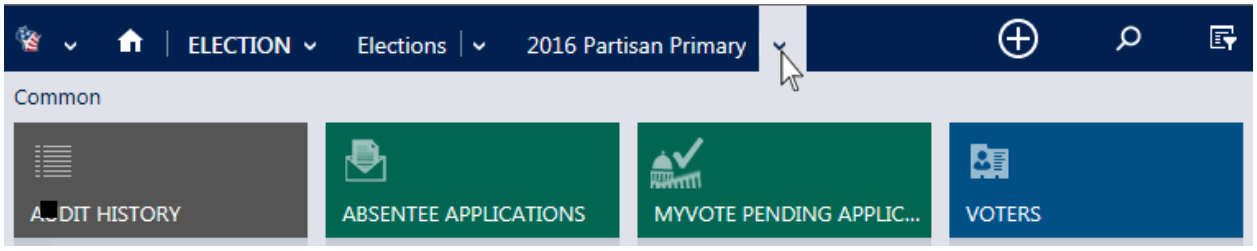
The WisVote homepage, *Easy Navigate* is displayed when you log in to the system. The information displayed on the navigation page is organized into four categories: 1) Voter, 2) Election, 3) Address, 4) Training and 5) Help. Tiles labeled with the name of specific election administration tasks are displayed below each category. Clicking the home icon on the command bar will return you to this homepage.



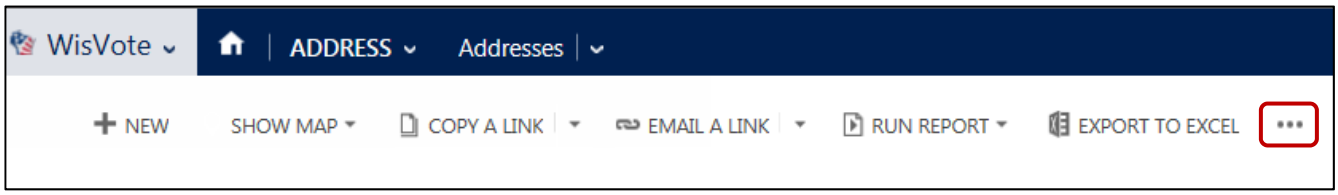
Navigation Overview

■ Navigation Features

The command bar at the top of the screen is the central navigation bar in WisVote. The hierarchy of the navigation goes from left to right. If a user is viewing information in the election category, the navigation bar can direct them to any of the election tiles or additional records linked to a specific election.



Below the navigation bar, are local command (action) buttons related to the specific area of the application you are currently viewing. The top five commands are displayed on the page; additional commands are found by clicking the ellipses button located to the right of the command buttons.

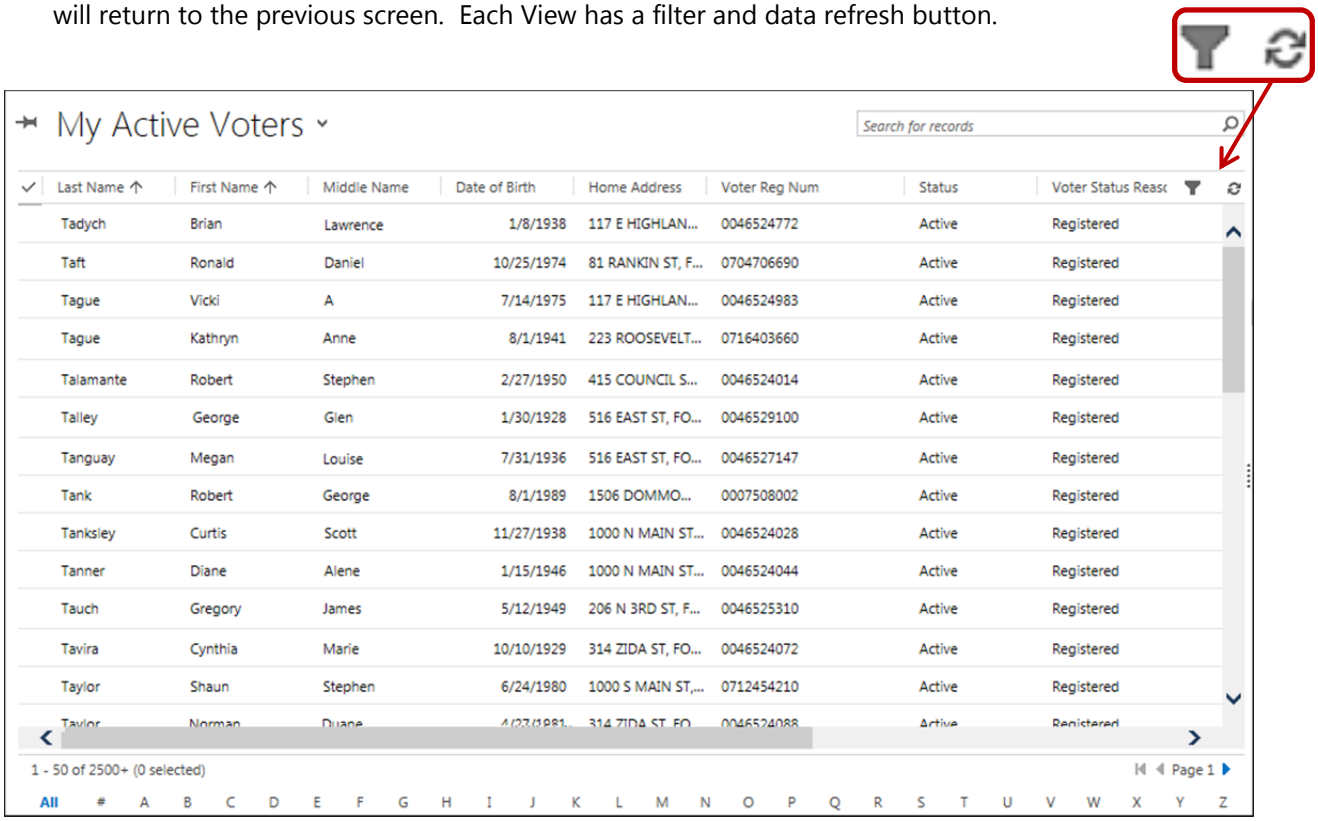


Home Icon

When you log in to WisVote, the homepage, *Easy Navigate* opens. You can return to the homepage at any time by clicking the Home button at the top of the screen.

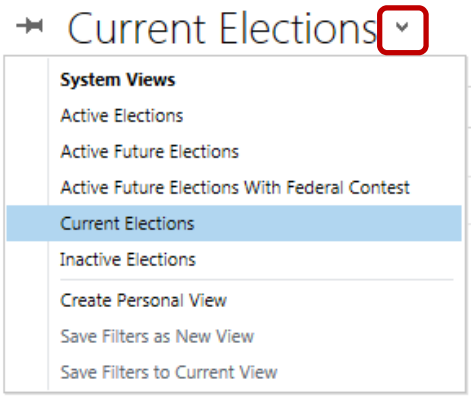
Views

Data is displayed in a View. The data fields in the view grids sometimes have hyperlinks, clicking a hyperlink will direct you to a different page. Clicking the Cancel button or the browser's back button will return to the previous screen. Each View has a filter and data refresh button.



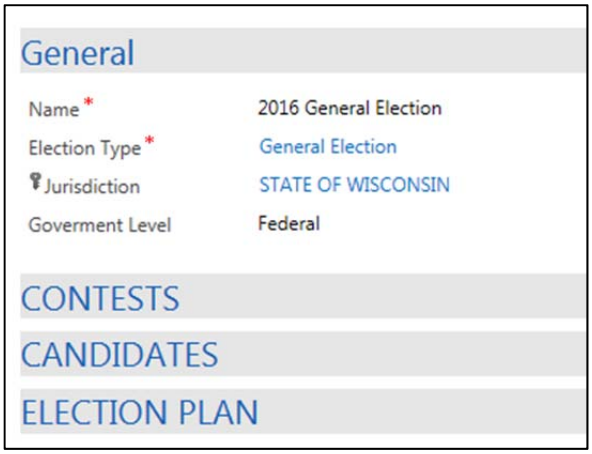
Change Views

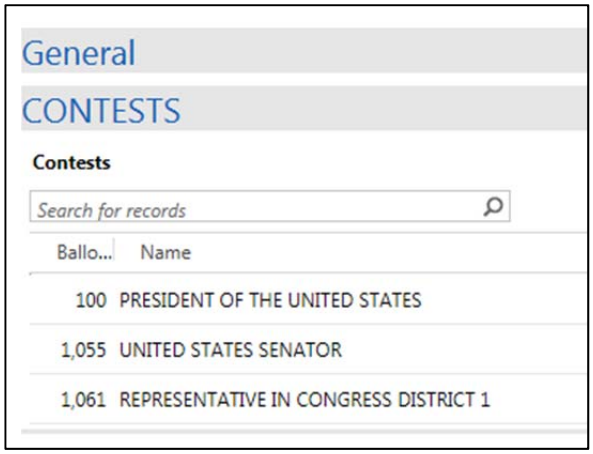
A View controls what data is presented in the grid. Often there is more than one view available. Clicking the chevron selects another view or to create a personal view.



Tabs

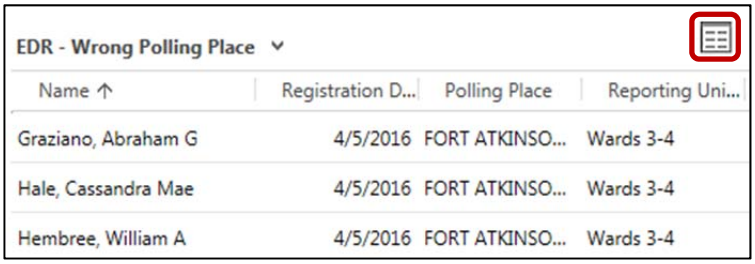
Views are incorporated in pages and displayed under a tab. Some of the tabs are defaulted open while others are collapsed. Clicking a tab collapses or expands the abbreviated view.





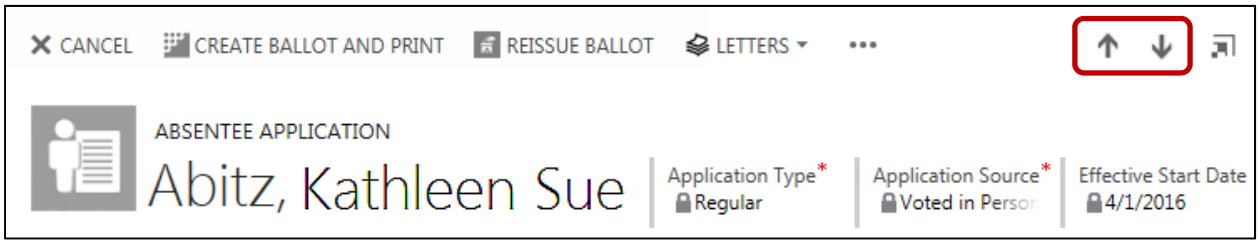
Expand Associated Views

The abbreviated view can be expanded further as it opens into a new page. Click the expand icon for a full page view.



Arrow Navigation

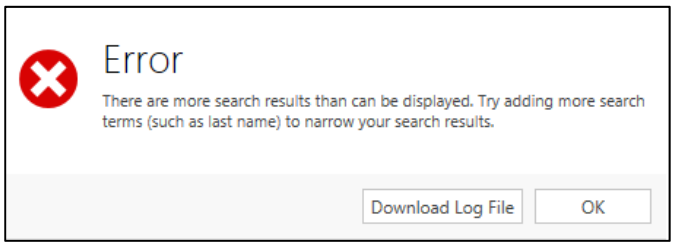
There is a shortcut solution to viewing individual records from a View. Arrows allow the user to move through the list without having to return to the original System or Associated View.



Views may have more data than can be displayed in a single page. At the bottom of the grid shows how many records are on the present page and how many associated pages are available. Click the arrow by the Page number to advance or return. Sometimes the display order can also be modified by selecting a first letter or by choosing numbers.

Search Function in WisVote

Full text searching simplifies the process of searching for addresses. In larger municipalities searching for a common number or name, (10, Paul) or a partial word (10 Main, Paul Stevens) will result in more search results than the system can display. A pop-up window with an error message will appear if a search produces too many results.



Recommended Search Method

When searching for addresses with a large number of apartments or units, or an address combination that would produce a high number of results, enter the address without the directional (802 5th). For example, to search for 1234 N Park St, enter: **1234 N Park St**. For all searches omit the unit type, for 3400 N Maryland Ave Apt S1720, enter **3400 Maryland Ave S1720**. Do not use quotations.

Searching for Paul will find:

Voters with the first, last or middle name of Paul: **Paul** Stevens; Megan **Paul;** Roger **Paul** Johnson John **Paul**sen; Karen **Paul**s

Searching for **10 Main St** will find:

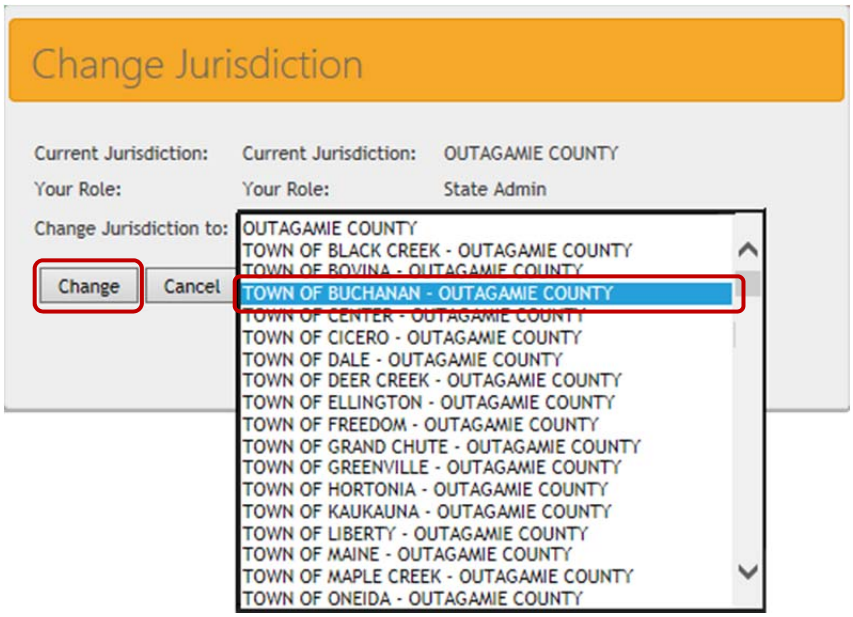
All addresses that contain 10 *and* Main *and* St: **10 Main St;** 11 **Main St** Apt **10**

Change User Jurisdiction

A County user or Provider can change the user jurisdiction by clicking the user name in the upper right corner of the screen. This action will open a Change Jurisdiction window where a different jurisdiction can be selected from the drop-down list.

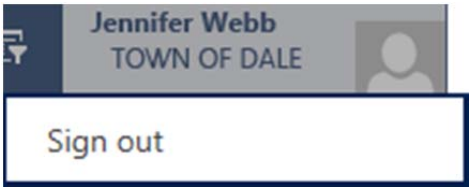
1. Click the user name located at the top right corner of the screen
2. In the Change Jurisdiction window, click the "Change Jurisdiction To" field
3. Select the jurisdiction from the drop-down list or search by typing the name of the jurisdiction

4. Click the Change button to complete the jurisdiction change



Log out

If multiple users access WisVote from a single computer you may wish to log out of WisVote at the end of a work session. Clicking the user name in the upper right corner of the screen and then clicking the Sign out button will end the user's session.

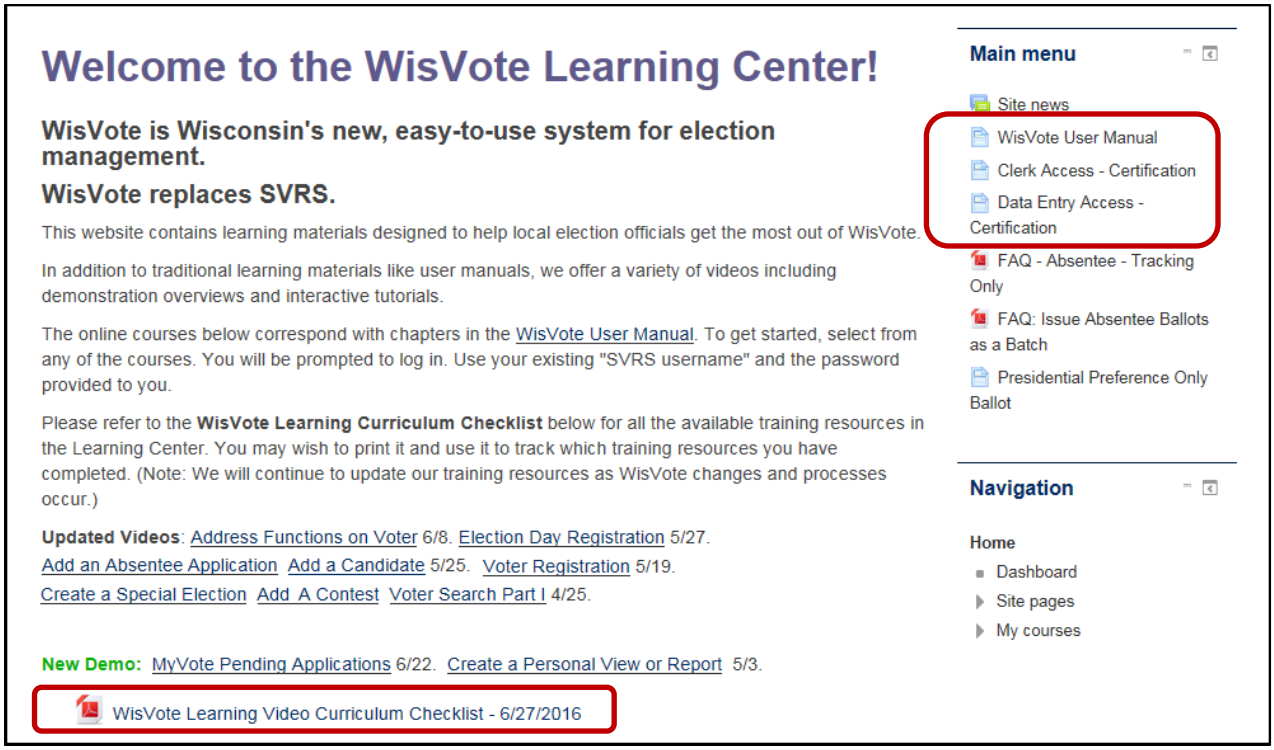


1.3 WisVote Learning Center

The WisVote Learning Center is an online platform that consists of interactive tutorials, section overviews, and the WisVote Manual. The Learning Center allows clerks and other election staff to complete training on their own time and should be used as a source for information at any point during the election process.

Home Page

When you log in to the WisVote Learning Center the home page displays new learning materials and updates, links to access Clerk Access & Data Access Certifications and the entire WisVote user manual. The WisVote Learning Video Curriculum Checklist includes the names and run time for the training videos available on the website.



Access the WisVote Learning Center

1. Open the **WisVote Learning Center**: www.electiontraining.gab.wi.gov
2. The WisVote Learning Center may be accessed directly from WisVote by clicking the Learning Center tile
3. Click Log in at the top of the page

4. Enter your Username and Password

   Username: WisVote username
   Password: Wisvote1

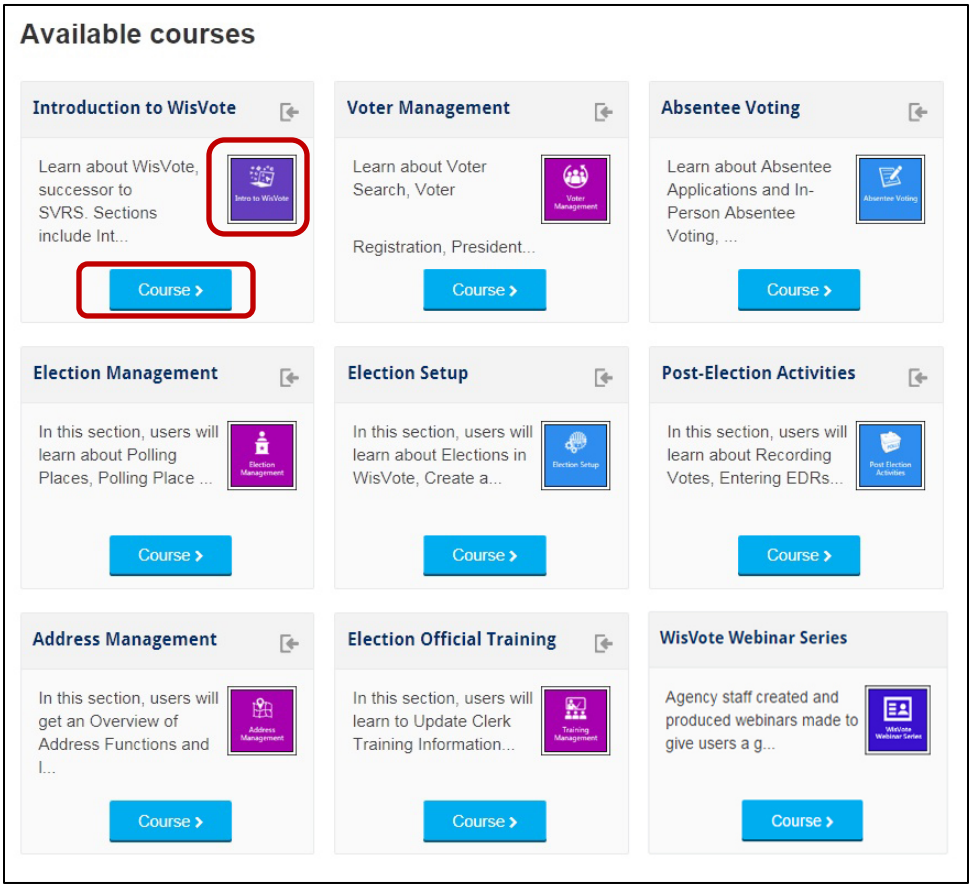
Note: If you cannot remember your user name or password, click the "Forgotten your username or password?" link.

Training Courses

The training material available on the WisVote Learning Center is divided into nine courses:

- Introduction to WisVote
- Election Management
- Address Management
- Voter Management
- Election Setup
- Election Official Training
- Absentee Voting
- Post-Election Activities
- WisVote Webinar Series

Select the course title or tile from the homepage to open the course page. The course page is divided into topics; the training resources (interactive tutorial, demonstration overview video or manual section) will display below the topic heading. The WisVote Webinar Series course houses training webinars and associated materials.

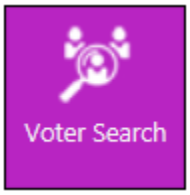


1.4 WisVote Tiles

WisVote action tiles located on the easy navigate page.

Voter Tiles

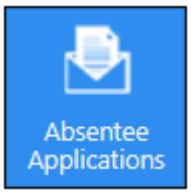
Snapshot
View new voter registrations, voter tasks due in the Next 7 days, Election Day registrations from voters in the wrong polling place and wrong jurisdiction



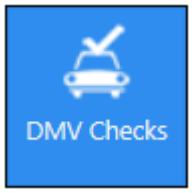
Voter Search
Search for voter records by municipality, county, state, district or election; conduct a count only voter search

Voter List
View a list of active and inactive voter records in your municipality; view a list of voters by category

Voter Registration
Enter a new voter registration (EL-131 form)



Absentee Applications
Enter an absentee application, review absentee applications, open absentee application records to issue absentee ballots and print absentee mailing labels



DMV Checks
Review DMV checks, send a DMV non-match letters; select that no further action is needed. (The DMV Check non-match simply informs the clerk the voter's information in WisVote does not match that person's information in the DOT database)

Reg List Alerts (HAVA Matches)
Review deceased, felon, and duplicate registration list alerts for the voters in your jurisdiction; accept or decline a deceased, felon or duplicate alert

Deaths
Contains a statewide list of deceased records maintained by the Wisconsin Department of Health Services - this is an information only tile

Felons
Contains a statewide list of felon records provided by the Wisconsin Department of Corrections - this is an information only tile

Confidential Voters
Manage confidential voter records

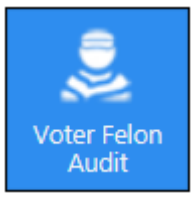
Care Facilities
Manage or create new care facility records

MyVote
Process pending voter registration forms received from MyVote

Election Tiles

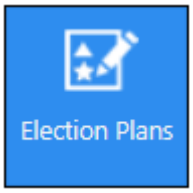
Elections
View a list of the current elections; open an election to review contests, add candidates, rename ballot styles, print poll books, record voter participation and manage election checkpoints

Special Elections
Create special elections



Voter Felon Audit

Polling Places
Create and edit polling place locations

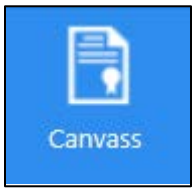


Election Plans
Create election plans; copy and modify election plans

Office Positions
Manage and review office positions; enter elected official records

Election Calendar
Link to the election calendar on the agency website

WEDCS
Link to log in to the Wisconsin Election Data Collection System (WEDCS); report election statistics



Canvass
Link to log in to the Canvass Reporting System; report election results

Address Tiles

Addresses
Review the active and inactive addresses within a particular municipality; add a new address, edit an existing address, perform data quality tasks

District Combos
Review the district combinations within a particular municipality

Jurisdictions
Review the jurisdictions within the State of Wisconsin

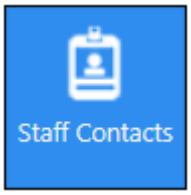
Districts
Review detailed information about each district within the State of Wisconsin

District Types
Review a list of all district types in WisVote

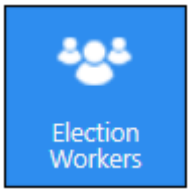
Training Tiles

Learning Center
Link to the WisVote Learning Center website. View the training manual, interactive tutorials, demonstration overviews, recent WisVote webinars and more.

Clerk Training
Submit and review clerk training records



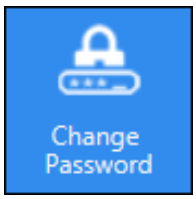
Staff Contacts
View staff contact information; G.A.B. staff is responsible for updating staff contact information



Election Workers
Manage election worker records; add election worker assignments, record election worker training

Help

FAQs Current Issues
Frequently asked questions and system issues, step-by-step guidelines, additional screen shot support



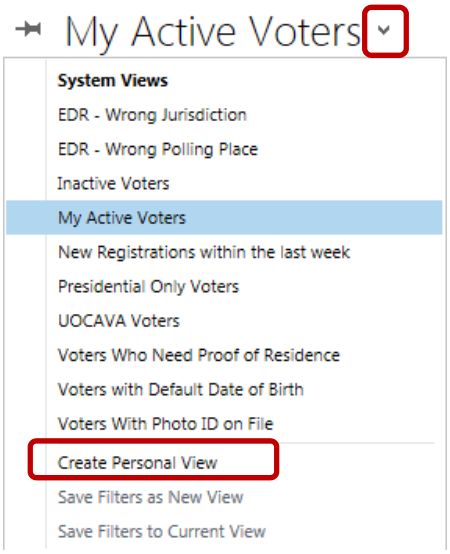
Change Password
Update user password

1.5 Advanced Features

Learn to create a custom Associated View (Personal View), while not mandatory, it is a power way to control how data is managed and displayed in a grid or exported into spreadsheets. This is especially important for data reports of +10,000 records. This view is created through WisVote's Advanced Find feature.

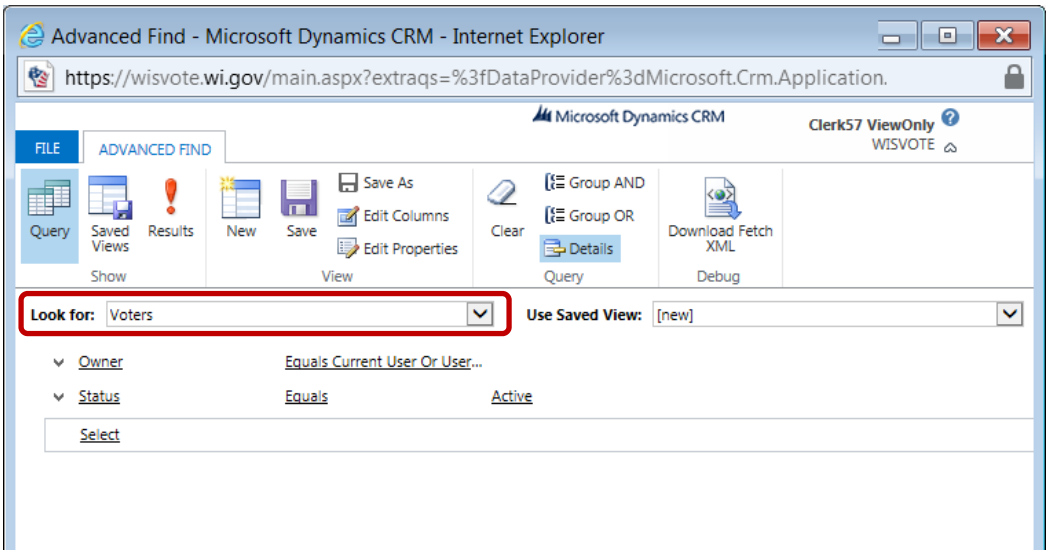
Create Personal View

1. A personal view can be created for any view. Go to any view displaying a grid. For example: Preparing a Walking List, click the Voter List tile on the Easy Navigate page
2. The view will display a default system view (e.g. My Active Voters). There are other view options including a *Create Personal View*. Clicking the chevron shows a drop-down list of these other views
3. Select Create Personal View



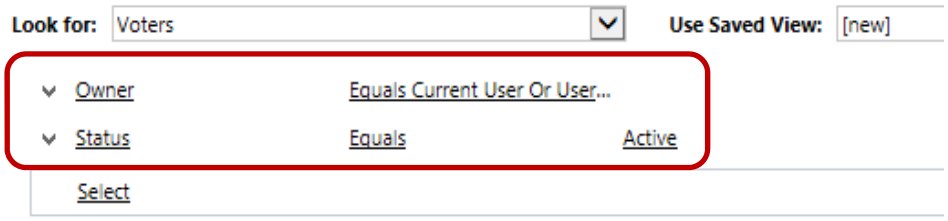
Advanced Find Feature

4. This opens the *Advanced Find* pop-up window. Use this to configure a list of filter parameters for a personal view. Begin with selecting the result you want in the *Look for* field. The default option is chosen by the current view, but you can choose from others in the drop-down list

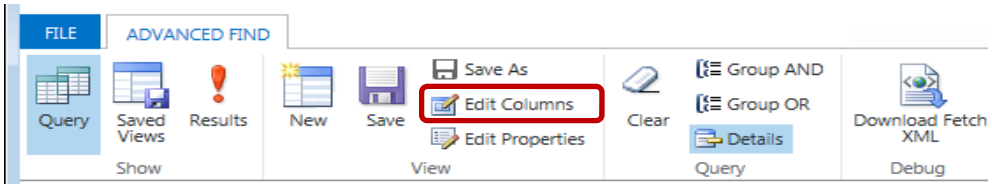


Set More Parameters

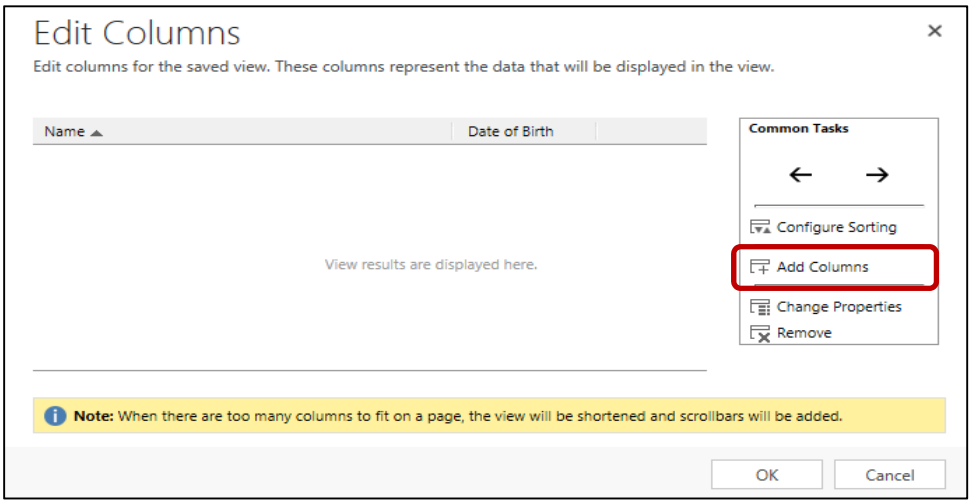
5. The entity selected in *Look for* sets the default parameters. These can be changed, but more often they are desired. Other options can be added by clicking Select. For this example no changes are needed as "my" active voters are desired for the Walking List.



6. To further specify what information will be included in our personal view, click Edit Columns

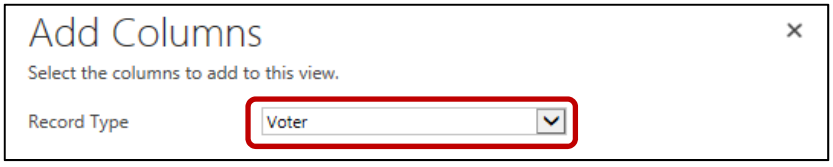


7. The *Edit Columns* window open. A Common Task section has a menu of editing options. Shown are the two columns from the Voter entity. If more data is needed, click Add Columns



The *Add Columns* window opens. The Record Type is what is in the *Look for* field (Step 4). The Record Type determines the available columns. For this example the columns need to include data that was not entered in the Voter record, but was entered in the Address record. The Record Type needs to be changed to an Address-related type.

8. To change the Record Type, click the drop-down and select Home Address (Address)

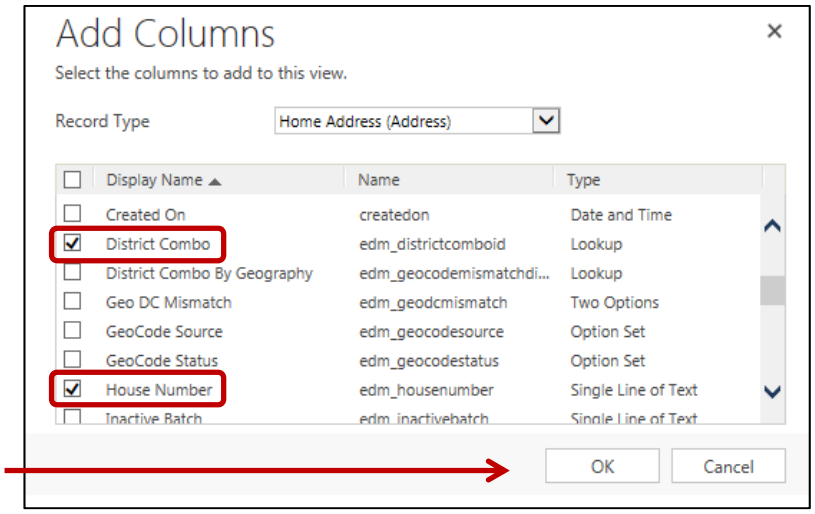


Walking List needs:

- District Combo Code
- House Number
- Street Name

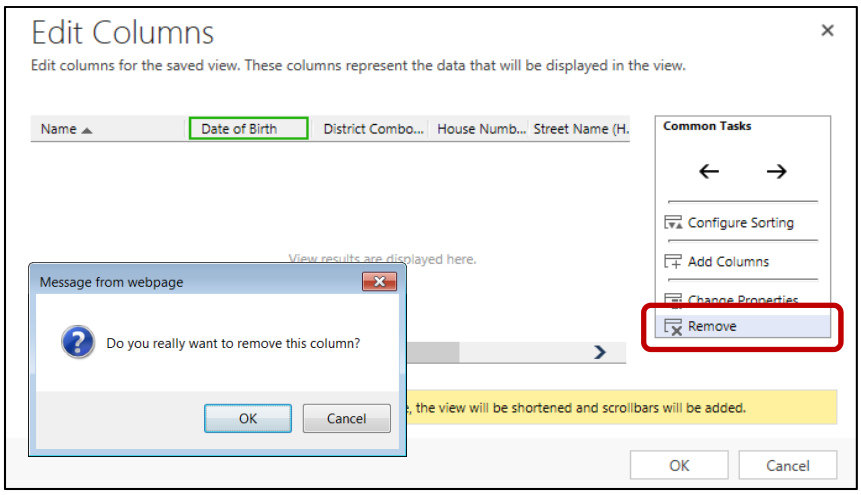
9. Use the scroll bar and then select the columns needed for the Personal View (e.g. Walking List, *Street Name* not shown)

10. To add the columns click OK

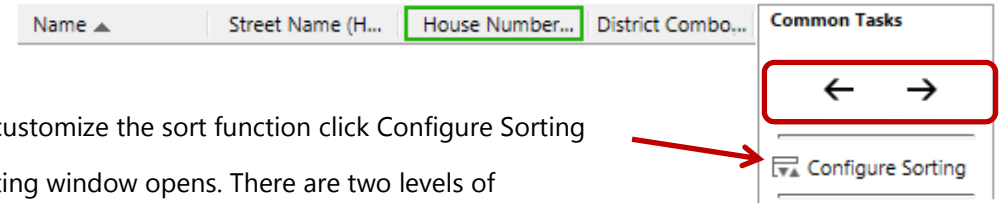


11. The new columns show. Verify no columns include private data. To remove DOB, click on the column and then click the Remove button

12. Click OK



13. (Optional) Use the arrows ← and → in the Common Tasks menu to organize columns. Select a column and then click the arrow to change its order. (There is no wrong or right order)



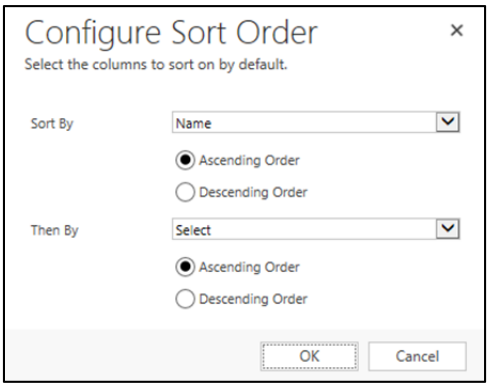
14. (Optional) To customize the sort function click Configure Sorting

The Configure Sorting window opens. There are two levels of sorting. The default sort will be limited to the primary record type. For this example: The Voter record type was limited to Name. The only Sort By option then is Name.

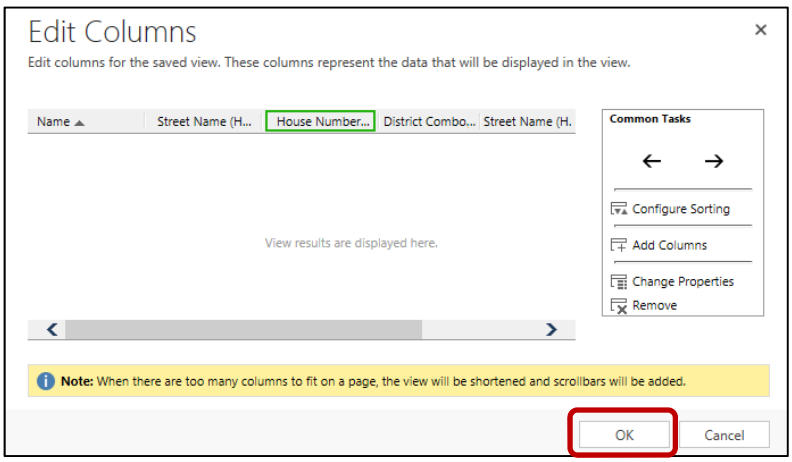
(Street Name, House Number and District Combo are from the Home Address record type.)

If there were multiple columns from Voter the secondary sort could be chosen in the Then By drop-down.

15. (Optional) If changes were made click OK. For this example click Cancel



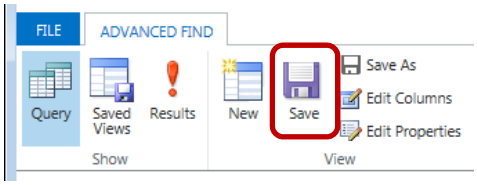
16. With all the columns added, configured, and sorted save these changes by clicking OK



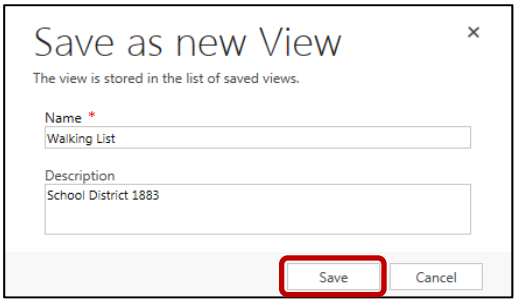
Save to a Personal View

17. For a reoccurring list to include as a personal view in your system views list click Save

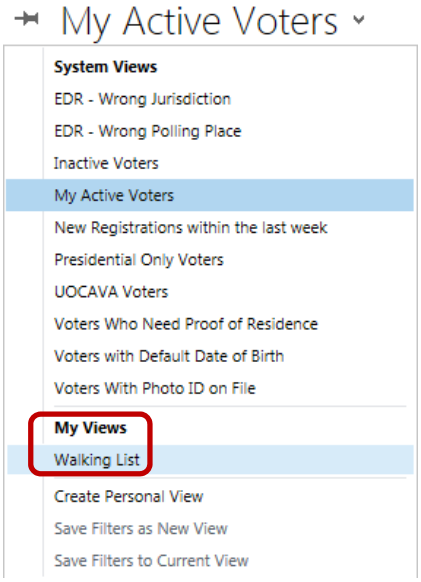
    (For one-time lists skip to Step 19)



18. Enter a Name and Description. Then click Save

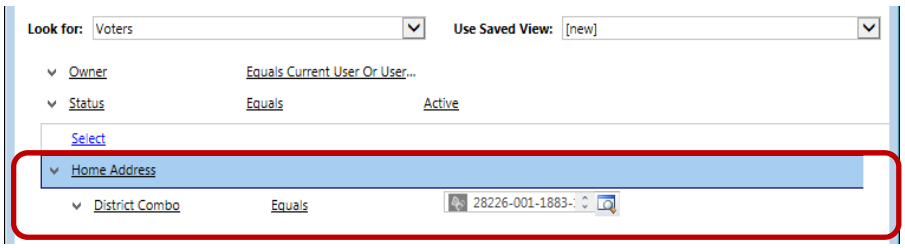


The Voter System Views list now has a My Views section and under it the newly created personal view called Walking List.

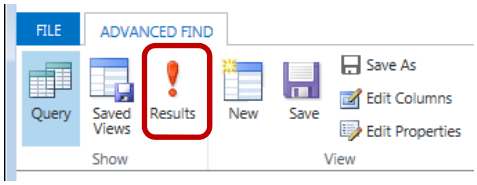


View Results

If this Personal View is for a one-time list, additional filters can be added (e.g. Walking List for all district combos for a specific school district).



19. When all the parameters are set it is time to get the list of matching records, click Results

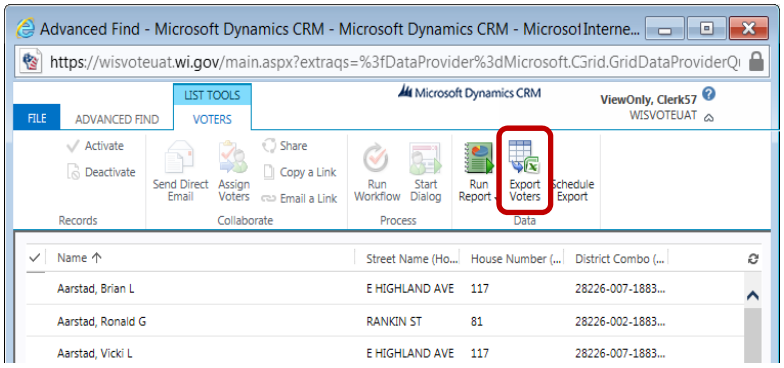


Export a List

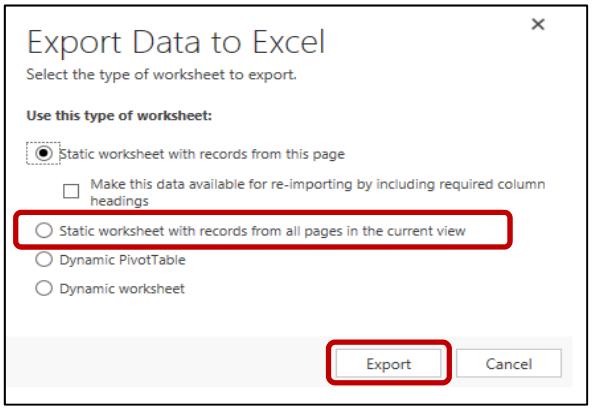
Advanced Find Export

1. For the one-time list after clicking Results a new *List Tools* tab displays. The tab is labeled Voters because the personal view is configured for a list of active voters (Step 4).

   To export the information click Export Voters

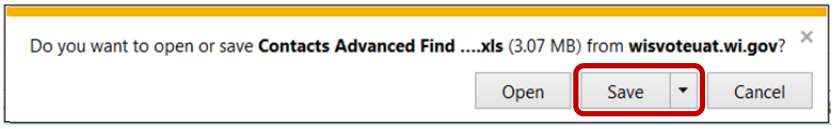


2. The *Export Data to Excel* window opens. The default, Static worksheet is limited to the first 50 records. To include records from all pages select the 2nd Static worksheet and click Export



3. Save the spreadsheet to your computer. Click Save

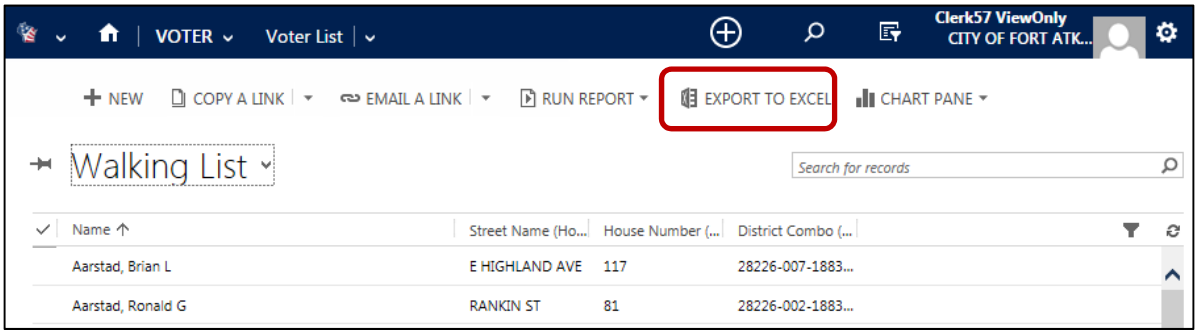
A Microsoft Patch may prevent file opening. See configuration instruction at the end of this section.



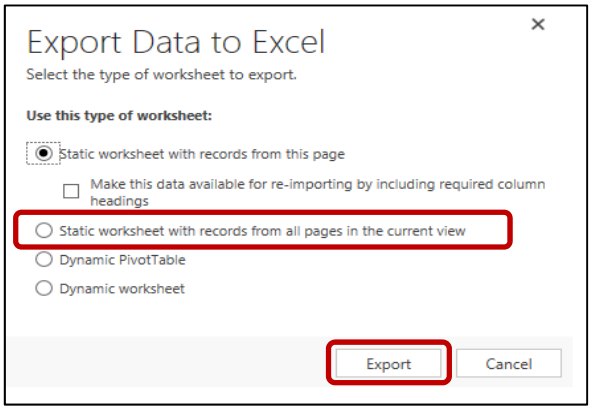
Personal View Export

1. Choose the personal view from the System Views list (e.g. select Walking List)

2. From the personal view click Export to Excel.

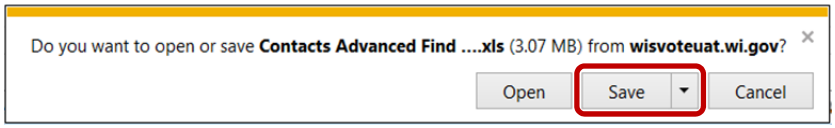


3. The *Export Data to Excel* window opens. The default, Static worksheet is limited to the first 50 records. To include records from all pages select the 2nd Static worksheet and click Export



4. Save the Excel spreadsheet to your computer. Click Save

> ! *A Microsoft Patch may prevent file opening. See configuration instruction at the end of this section.*



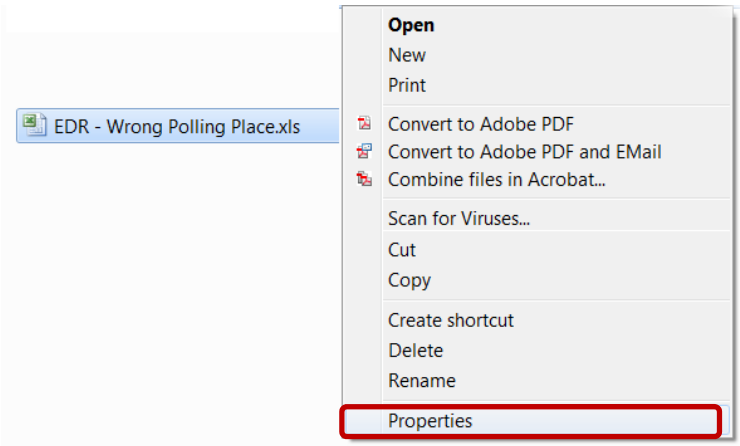
Exporting Data to Excel from a Website (like WisVote)

Microsoft recently added security patches restricting access to downloaded, online spreadsheets. The feature can be disabled for individual files or MS Excel can be configured to disable the security feature entirely. Please consult with your IT department before disabling this security feature. (Included are both options.)

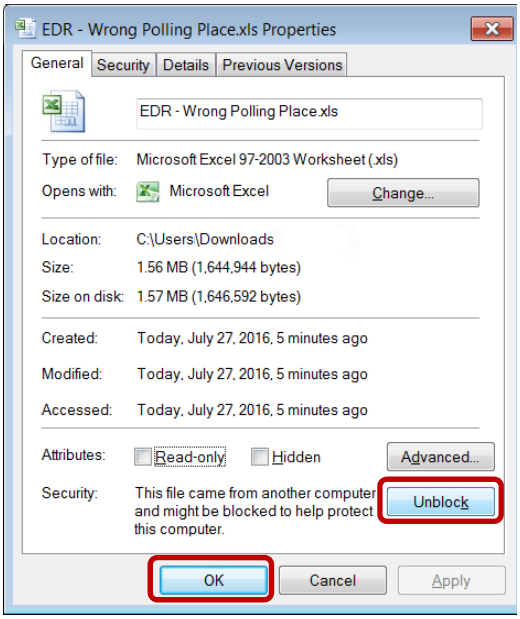
Configure to Allow Per Use

1. Right click on excel file

2. Click **Properties**

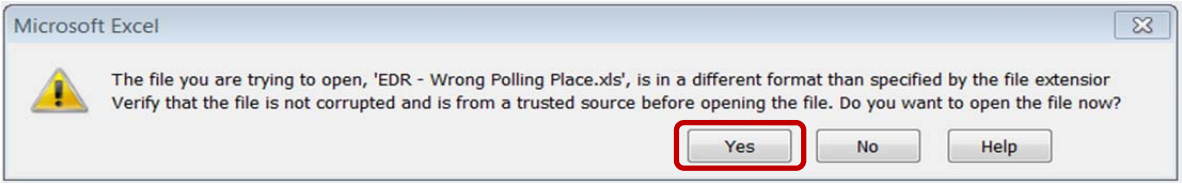


3. Click **Unblock** and **OK**



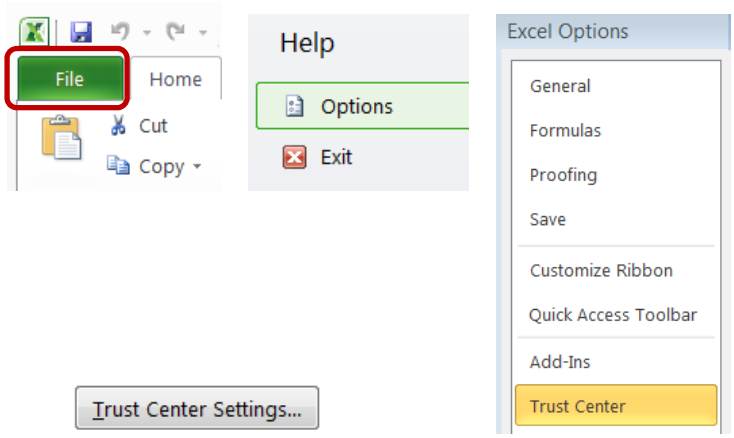
4. Open the Excel file

5. Click **Yes** and spreadsheet opens



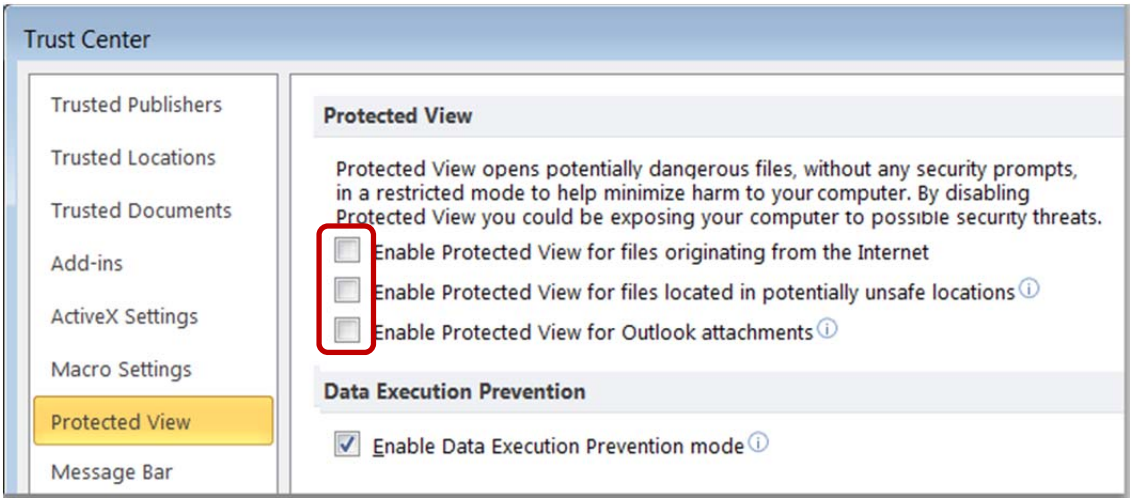
Configure to Open All Downloaded Spreadsheets

1. Open Excel
2. Click the **File** tab
3. Click **Options**
4. Click **Trust Center**



5. Click **Trust Center Settings**

6. Click **Protected View**
7. Uncheck the 3 Protected View options



8. Click **OK**; Click **OK**

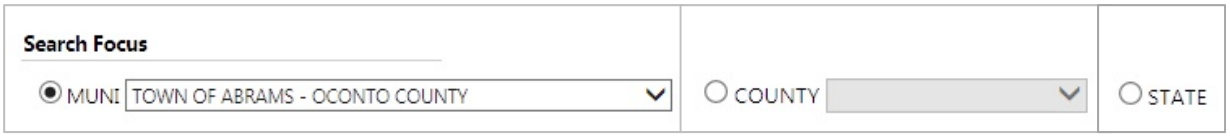
2.1 Voter Search

The Voter Search page is organized by four main focuses: Search, General, District, and Election. To search for a voter, enter information into a data field and click the Search button. To remove all information from the data fields and start a new search, click the Clear button. To help refine the search, information may be entered into multiple data fields and search focuses. Use the Count Only voter search feature to retrieve numeric search results only.

Introduction to the Voter Search Page

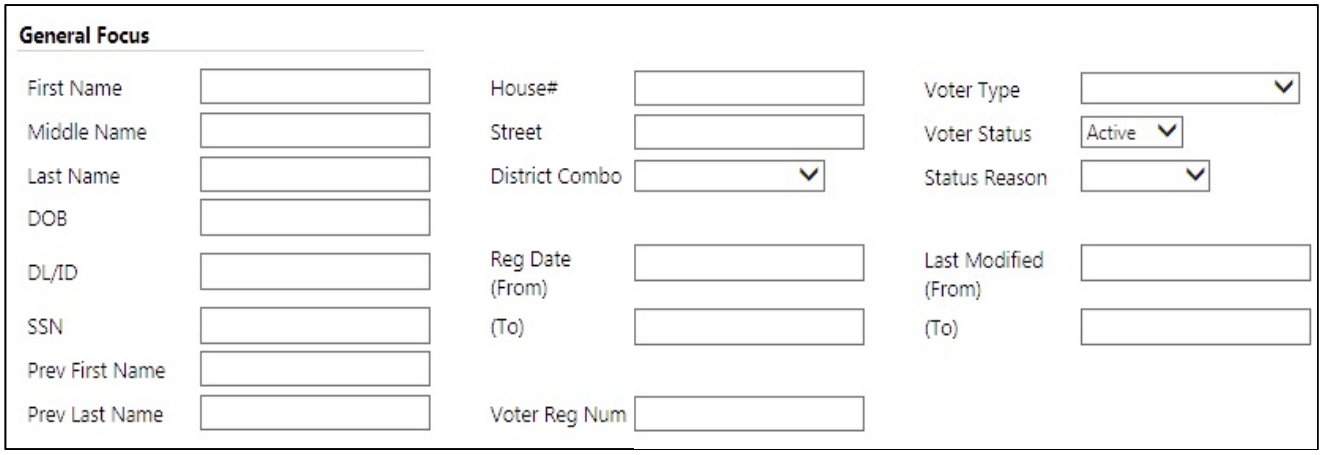
■ Search Focus

The search focus determines the jurisdiction of the voter search. Use the Muni, County, State focus to search for voters within the selected jurisdiction. The search focus will default to the user jurisdiction.



■ General Focus

Use the general focus to search for voter records using specific criteria (Name, Voter Type, Address). There are three columns of data search fields; enter information into multiple data fields to narrow the search results.



General Focus Search Fields

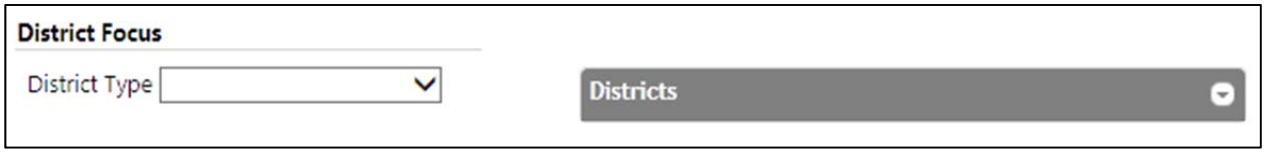
> *For optimal system performance, search using at least the first 3 letters of the first or last name!*

- **First Name**
- **Middle Name**
- **Last Name**
- **Date of Birth (DOB)**
- **Wisconsin Driver License or Identification Card (DL/ID)**
- **Social Security Number (SSN):** last four digits
- **Previous First Name**
- **Previous Last Name**
- **House Number**: enter the exact house number; partial entries will not yield accurate results (e.g. 21 will result in 21 W DAVID DR, but not 212 HIGHLAND ST)
- **Street**: enter the full or partial street name, then select the street from the drop-down list
- **District Combo**: a specific Muni or County search focus must be selected to search by DC
- **Registration Date:** manually enter or select the date range from the calendar; leave the (To) field blank to search all voter records (From) a specific date to "today's date"
- **Voter Registration Number**
- **Voter Type**: Regular, Military, Permanently Overseas
- **Voter Status:** All, Active, Inactive; the default status is Active
- **Status Reason:** Registered, Suspended 30 day notice, Suspended 4 year notice
- **Last Modified**: manually enter or select the date range from the calendar; leave the (To) field blank to search all voter records (From) a specific date to "today's date"

District Focus

Use the district focus to search for records of voters who live within a specific district. The district focus is comprised of two data fields; District Type and Districts. The District Type data field will display a drop-down list of district types that are tied to the jurisdiction selected in the search focus.

- **Muni District Search:** districts tied to any of the district combos in that municipality
- **County District Search:** districts of the selected type tied to any of the district combos in any municipality in that county
- **State District Search:** districts tied to any district combos in the state

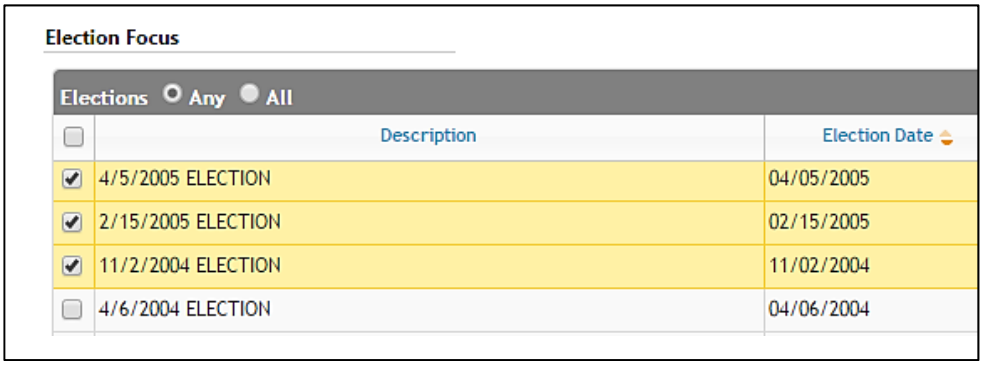


Election Focus

Use the Election Focus to locate records of voters who voted in a specific election. Click the checkbox next to the election name to select one or multiple elections to search for voters with participation recorded in any or all of the elections checked.

The election focus grid will display elections that are associated with the jurisdiction selected in the search focus.

- **Muni Election Search**: state, county and municipal elections for the selected municipality
- **County Election Search**: state, county and municipal elections within the selected county
- **State Election Search**: statewide elections



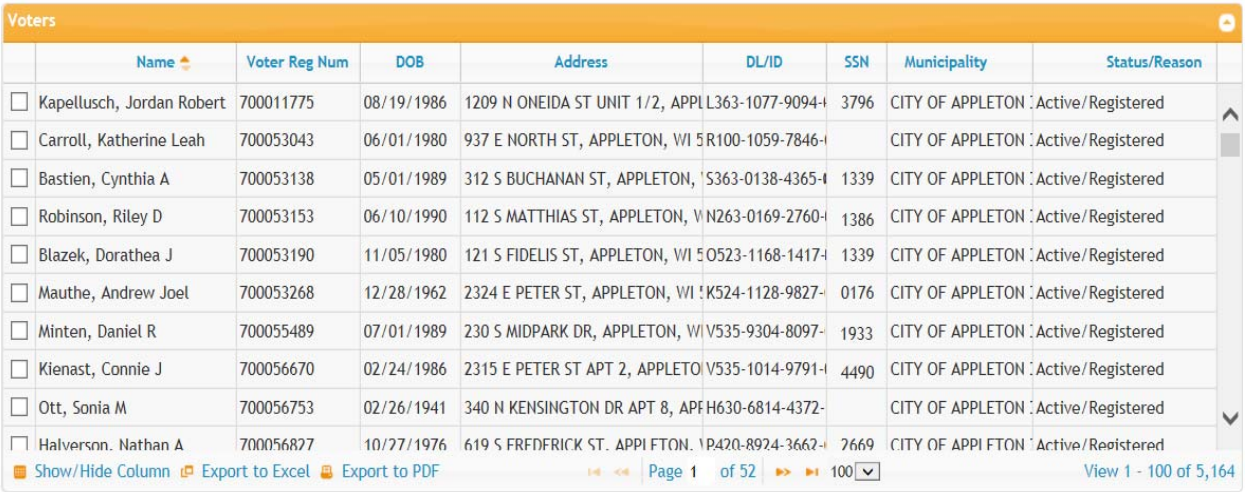
Election Focus

Elections Any All

	Description	Election Date
☑	4/5/2005 ELECTION	04/05/2005
☑	2/15/2005 ELECTION	02/15/2005
☑	11/2/2004 ELECTION	11/02/2004
☐	4/6/2004 ELECTION	04/06/2004

Voter Search Results Grid

Search results are displayed in the grid at the bottom of the page. The Search grid will not appear on the Voter Search page until the user clicks the Search button. If the Clear button is selected, the search grid will disappear.



Voters

Name	Voter Reg Num	DOB	Address	DL/ID	SSN	Municipality	Status/Reason
Kapellusch, Jordan Robert	700011775	08/19/1986	1209 N ONEIDA ST UNIT 1/2, APPL	L363-1077-9094-	3796	CITY OF APPLETON	Active/Registered
Carroll, Katherine Leah	700053043	06/01/1980	937 E NORTH ST, APPLETON, WI 5	R100-1059-7846-		CITY OF APPLETON	Active/Registered
Bastien, Cynthia A	700053138	05/01/1989	312 S BUCHANAN ST, APPLETON,	S363-0138-4365-	1339	CITY OF APPLETON	Active/Registered
Robinson, Riley D	700053153	06/10/1990	112 S MATTHIAS ST, APPLETON, W	N263-0169-2760-	1386	CITY OF APPLETON	Active/Registered
Blazek, Dorathea J	700053190	11/05/1980	121 S FIDELIS ST, APPLETON, WI 5	O523-1168-1417-	1339	CITY OF APPLETON	Active/Registered
Mauthe, Andrew Joel	700053268	12/28/1962	2324 E PETER ST, APPLETON, WI 5	K524-1128-9827-	0176	CITY OF APPLETON	Active/Registered
Minten, Daniel R	700055489	07/01/1989	230 S MIDPARK DR, APPLETON, W	V535-9304-8097-	1933	CITY OF APPLETON	Active/Registered
Kienast, Connie J	700056670	02/24/1986	2315 E PETER ST APT 2, APPLETO	V535-1014-9791-	4490	CITY OF APPLETON	Active/Registered
Ott, Sonia M	700056753	02/26/1941	340 N KENSINGTON DR APT 8, APP	H630-6814-4372-		CITY OF APPLETON	Active/Registered
Halverson, Nathan A	700056827	10/27/1976	619 S FREDERICK ST, APPLETON,	P420-8924-3662-	2669	CITY OF APPLETON	Active/Registered

Show/Hide Column Export to Excel Export to PDF Page 1 of 52 100 View 1 - 100 of 5,164

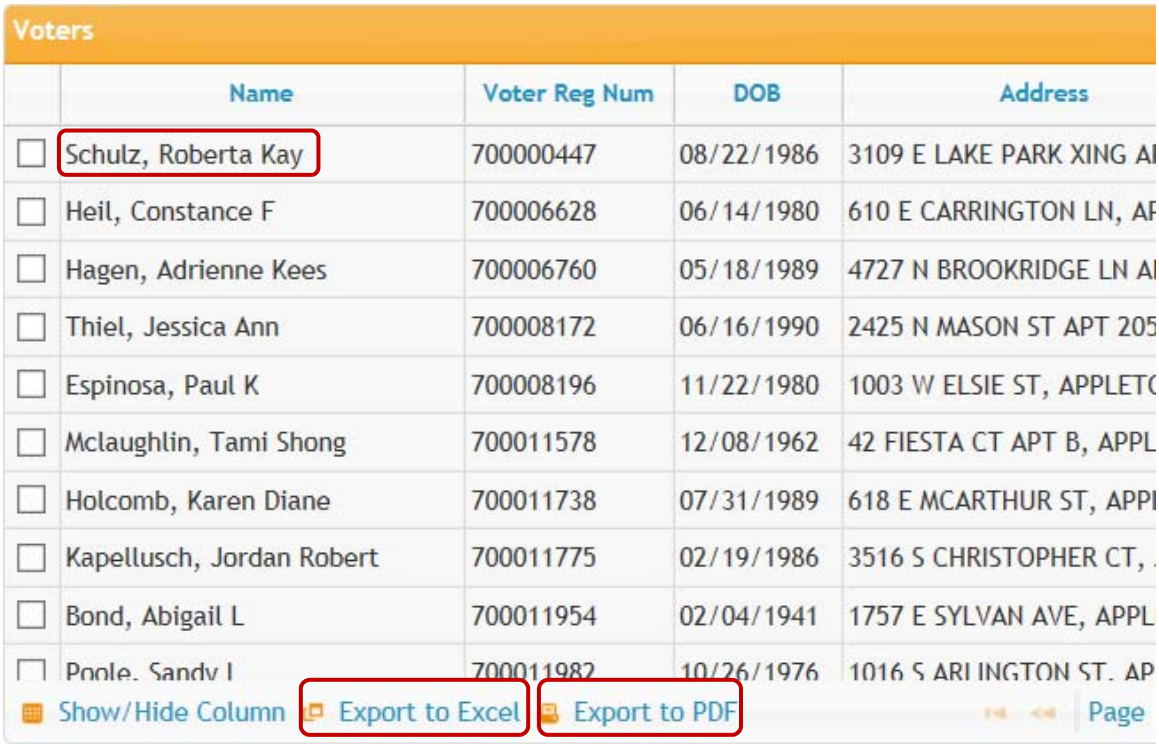
Search for a Voter by Municipality

1. Click the Voter Search tile
2. Select the Muni search focus
3. Select the municipality from the drop-down list
   Note: the municipality will default to the user jurisdiction
4. Enter additional information into the general focus fields to narrow the search results
5. Click search, results will display in the search grid

6. To open a Voter Record, double click the name of the voter

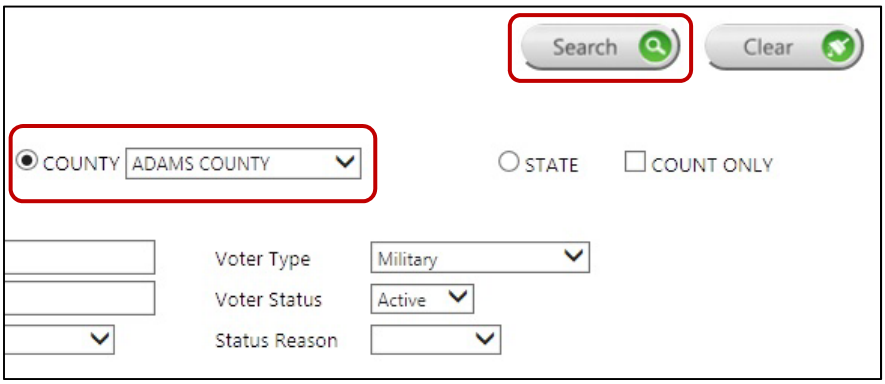
To export the search results, click the Export to Excel button or Export to PDF button at the bottom of the search grid. The Show/Hide Column can modify what data is included in the exports

Note: there is a 10,000 voter export record limit. Reports with 10,000+ records can be exported from Advanced Find. This will be done as a scheduled nightly task so you will be able to access that information the next day. (See 1.5 Advanced Features).



Search for a Voter by County

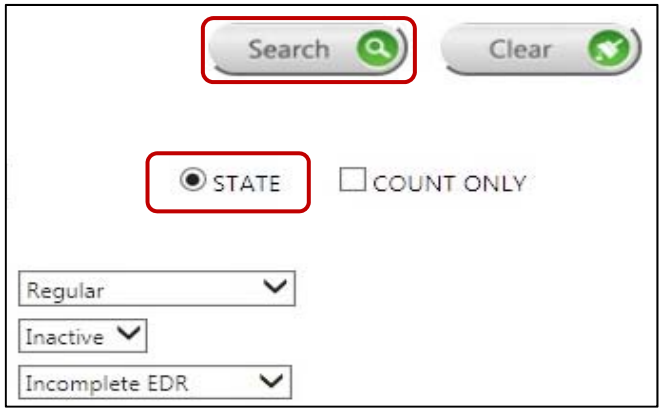
1. Click the Voter Search tile
2. Select the County search focus
3. Select the county from the drop-down list
4. Enter additional information into the general focus fields to narrow the search results
5. Click search, results will be display in the search grid



6. To open a Voter Record, double click the name of the voter
7. To export the search results, click the Export to Excel button or Export to PDF button at the bottom of the voters grid

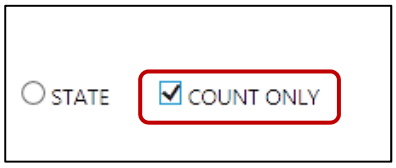
Statewide Voter Search

1. Click the Voter Search tile
2. Select the State search focus
3. Enter information into the general focus fields to narrow the search results
4. Click search, results will be displayed in the search grid



5. To export the search results, click the Export to Excel button or Export to PDF button at the bottom of the search grid

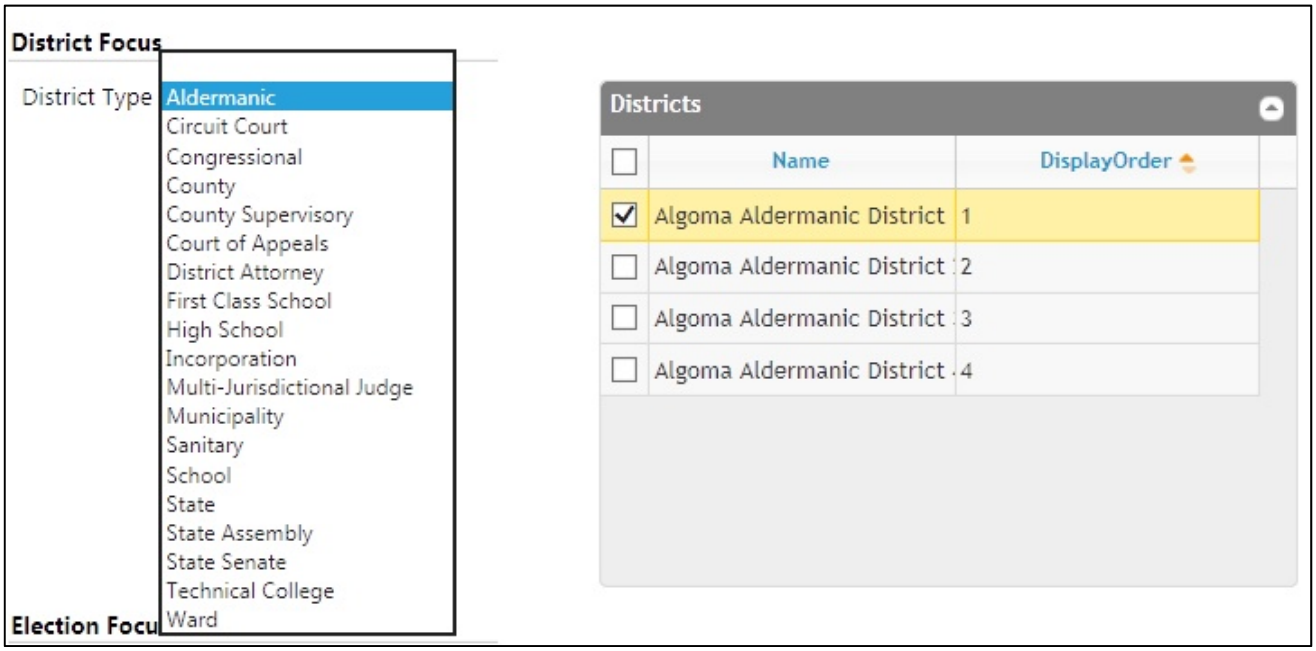
Count Only Voter Search



1. Click the Voter Search tile
2. Select the Muni, County or State search focus
   Note: the search focus will default to the user jurisdiction
3. Select the Count Only box
4. Enter additional information into the general focus fields to narrow the search results
5. Click search, the count will display at the bottom of the page

Search for a Voter by District

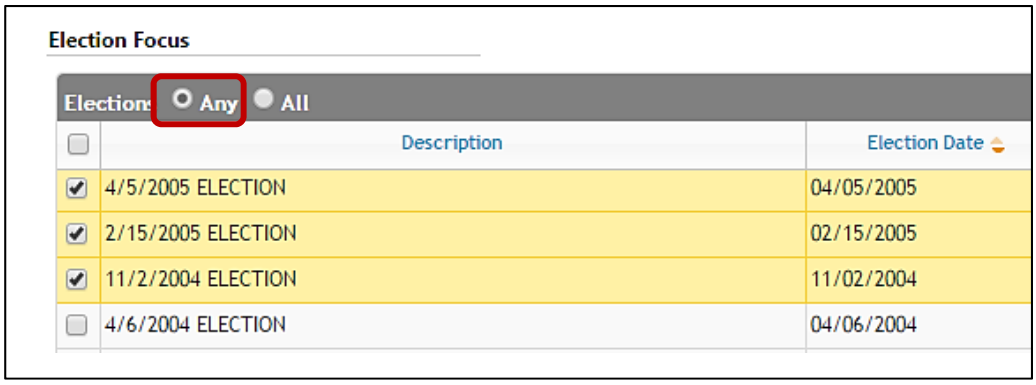
1. Click the Voter Search tile
2. Select the Muni, County or State search focus
3. Select the district type from the District Type drop-down list
4. Select the district from the districts grid



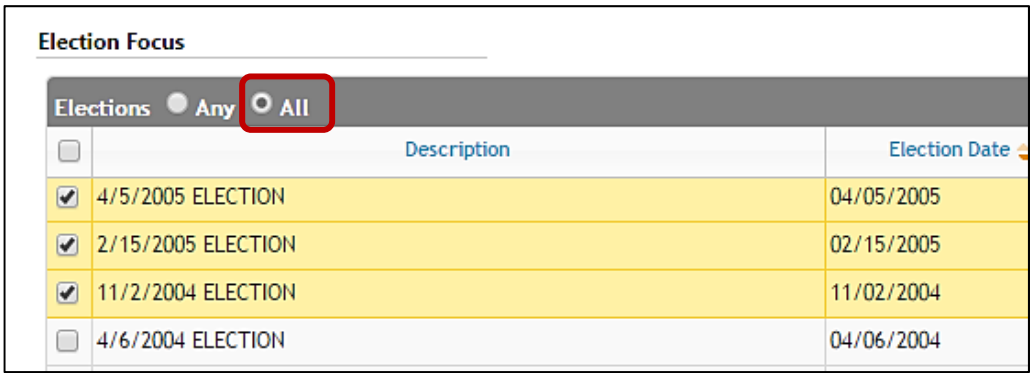
5. Click search, results will be displayed in the search grid
6. To export the search results, click the Export to Excel button or Export to PDF button at the bottom of the search grid

Search for a Voter by Election

1. Click the Voter Search tile
2. Select the Muni, County or State search focus
3. Select the specific election or elections in the elections grid
4. Select "Any" to search for voters who participated in any of the selected elections
   Note: any is the default selection



5. Select "All" to search for the voters who participated in all of the selected elections



6. Click search, results will be displayed in the search grid
7. To export the search results, click the Export to Excel button or Export to PDF button at the bottom of the search grid

2.2 Voter Registration

The Voter Registration tile is used to register a new voter and process a name or address change for an existing voter. WisVote prevents duplicate records from being created by searching all records to see if the voter is already registered in WisVote. (Election Day Registration (EDR) is created under the specific election under the Elections tile – see Chapter 6.2 Post-Election Activities.)

The system validates voter registrations by assigning a unique voter registration number (or if updating an existing voter, by providing the registration number previously assigned to the voter) and will automatically associate the voter with the correct voting districts.

Voter Registration Tips

Voter Types

- Regular
- Military
- Permanent Overseas

Registration Period

- Open
- Closed – after the 3rd Wednesday before an election

Registration Date

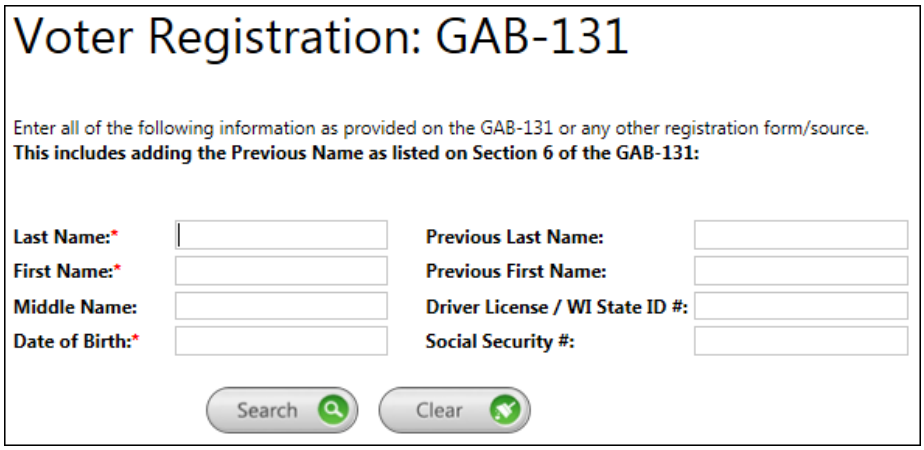
- Date the election official receiving the application determined it complete, acceptable form of proof of residence provided

Required Fields for Data Entry

- Name
- Date
- Residential Address
- Date of Birth
- Valid Wisconsin Driver License, State ID number, or last 4 digits of Social Security Number (or an indication that the voter has none of the above)
- Proof of Residence (POR)
- POR issuing entity
- POR unique number, if any

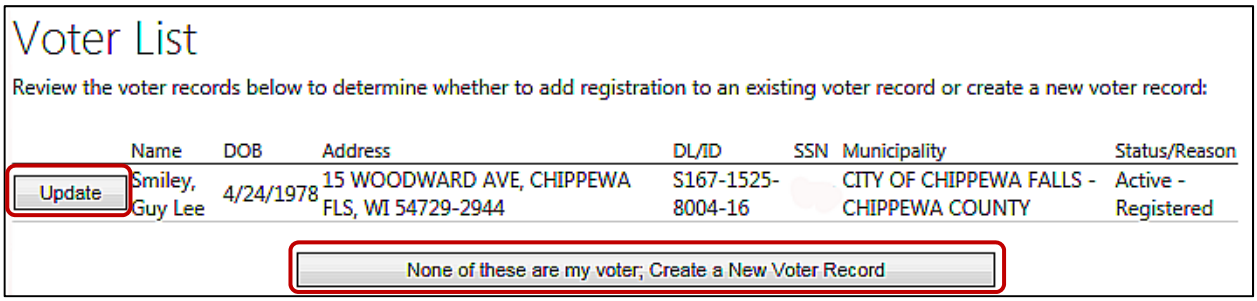
Add a New Voter Registration (Open & Late Periods)

1. Click the Voter Registration tile
2. Enter the required Last Name , First Name, and Date of Birth of the voter and any optional information in the Voter Registration Search page, then click search



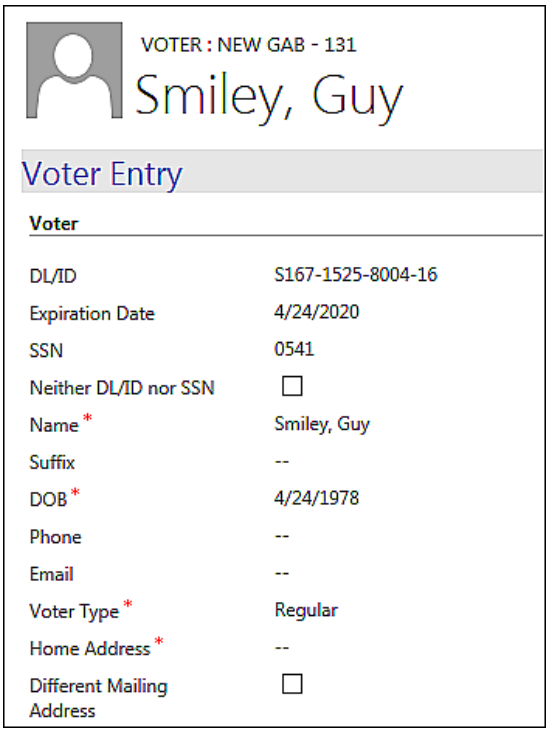
3. If a match is not found, click the ...*New Voter Record* message bar to create a new voter record

4. If a match is found, the voter record will appear in the Voter List; verify the information to determine if the voter is already registered; click the message bar to create a new voter record or click the Update button to update the voter record



Note: a Duplicate Election Participation warning displays if the elector has already registered a vote

5. Enter the driver license or state ID number in the DL/ID field
6. Enter the driver license or state ID expiration date in the Expiration Date field (MM/DD/YYYY)
7. Enter the last 4 digits of the social security number in the SSN field (if available)
8. If neither a DL/ID number or SSN were provided, click the Neither DL/ID nor SSN checkbox
9. Enter the optional Phone and Email fields
10. Voter Type is default to Regular; change if Military or Permanently Overseas
11. Enter the applicants street number and name in the Home Address field, then press enter or click the magnifying class to display the search results
    Note: exclude or abbreviate the street type (St, Ave, Ct, Rd, Cir) to produce results

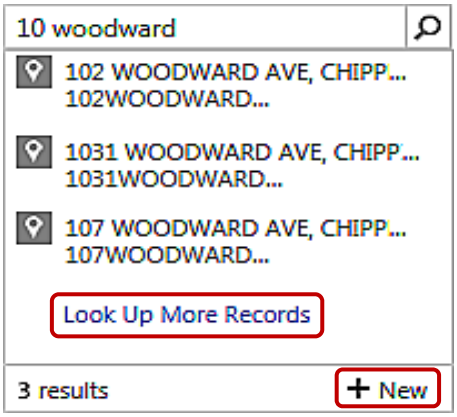


12. Select the address from the drop-down list of address search results

13. If the address is not found in the drop-down list of search results, click *Look Up More Records* to display more records or refine the search parameter

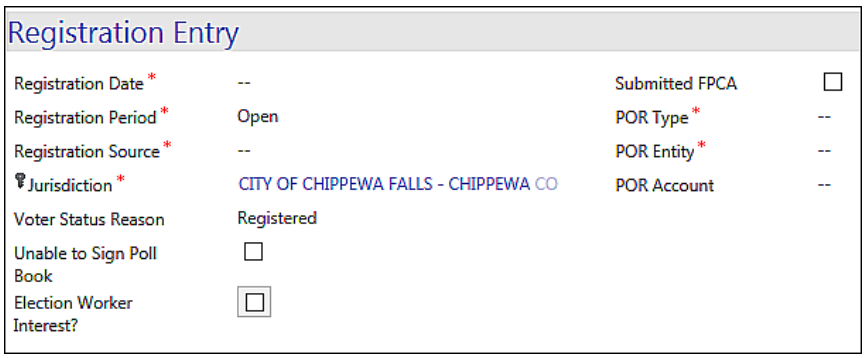
    If a matching address is still not found, and a new address must be entered, click the +New button in the Look Up Record window to add a new address

    Note: *Address Already Exists in Database* error may display after attempting to add a new address (see 7.2 Addresses)



14. Click the different mailing address checkbox if a different mailing address was provided, then enter the mailing address

15. In the New Voter Registration Application form, enter the date the registration was effective in the Registration Date field



16. The Registration Period field can be changed from Open to Late; verify which registration period is appropriate

    Note: Election Day Registrations (EDR) are entered via the Election tile under the specific election and not from the Voter Registration tile

17. Click the Registration Source field and select the source of the voter registration application from the drop-down list

18. Click the POR Type field, and select the type of proof of residence received with the voter registration application from the drop-down list

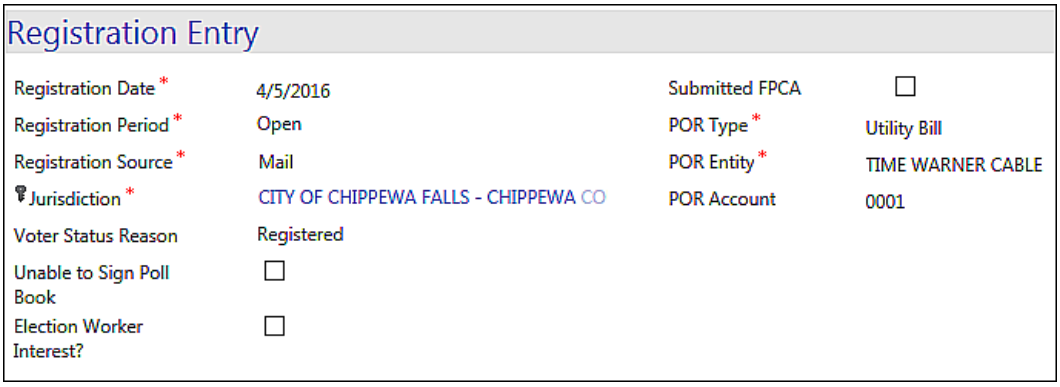
- Affidavit for Homeless Electors
- Bank Statement
- College Student ID with Fee Receipt (dated within last nine months)
- Care Facility Document
- Driver License or ID Card
- Employment ID Card (not business card)
- Government ID Card
- Other Document Issued by a Unit of Government
- Paycheck
- Real Estate Tax Bill (current year or the year preceding)
- Residential Lease
- Utility Bill (within 90 days of the date of registration)

Note: a corroborating witness is no longer an acceptable form of POR. The option remains for historical purposes for the past voter records associated with that POR type.

19. Click the POR Entity field and enter the name of the entity that issued the proof of residence

20. If there is a unique number associated with the proof of residence document, click the POR Account field and enter the last few digits of the number

    - 7 or more digits in length, record the last 4 digits
    - 6 or fewer digits in length, record the last 2 digits



21. Click Save & Close to save registration record and return to the Voter Registration page

Update an Existing Voter Registration (Open & Late Periods)

1. Click the Voter Registration tile
2. Enter the required Last Name, First Name, and Date of Birth of the voter, then click search (For name change, enter the new name and include the previous name)
3. Click the Update button next to the matching voter registration record
4. Compare the information on the registration form to the information in the voter record; update the information
5. Enter the date the registration was effective in the Registration Date field
6. The Registration Period field can be changed from Open to Late; verify which registration period is appropriate
7. Click the Registration Source field and select the source of the voter registration application from the drop-down list
8. Click the POR Type field and select the type of proof of residence received with the voter registration application from the drop-down list
9. Click the POR Entity field and enter the name of the entity that issued the proof of residence
10. If there is a unique number associated with the proof of residence document, click the POR Account field and enter the last few digits of the number

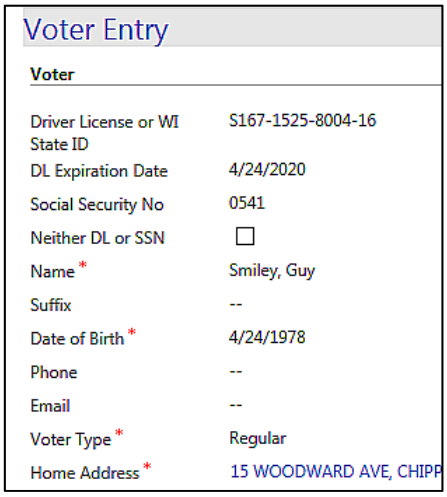
    - 7 or more digits in length, record the last 4 digits
    - 6 or fewer digits in length, record the last 2 digits

11. Click Save & Close to save the updated voter registration record and return to the Voter Registration Search page

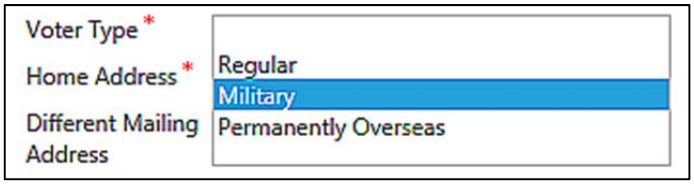
Federal Post Card Application

The Federal Post Card Application (FPCA) is a dual federal voter registration and absentee request form that is available to military and overseas voters. The FPCA is available on the internet, military bases, embassies, and consulates worldwide.

1. Click the Voter Registration tile
2. Enter the required Last Name, First Name, and Date of Birth of the voter and any optional information in the Voter Registration Search page, then click search
3. If a match is found, the voter record will appear in the Voter List; verify the information to determine if the voter is already registered; click the message bar to create a new voter record if the voter is not registered, or click the Update button to update the voter record



4. Enter the driver license or state ID number in the DL/ID field
5. Enter the driver license or state ID expiration date in the
6. Expiration Date field (MM/DD/YYYY)
7. Enter the last 4 digits of the registrants social security
8. number in the SSN field (if available)
9. If neither a DL/ID number or SSN were provided, click the Neither DL/ID nor SSN checkbox
10. Enter the optional Phone and Email fields
11. Click the Voter Type field in the Voter Record and select Military or Permanently Overseas



12. Enter the applicants street number and name in the Home Address field, then press enter or click the magnifying class to display the search results
    Note: exclude or abbreviate the street type (St, Ave, Ct, Rd, Cir) to produce results
13. Click to select the address from the drop-down list of address search results

    If the address is not found in the drop-down list of search results, click *Look Up More Records* to display more records or refine your search parameters

    If a matching address is still not found, and a new address must be entered, click the New button in the Look Up Record window to add a new address

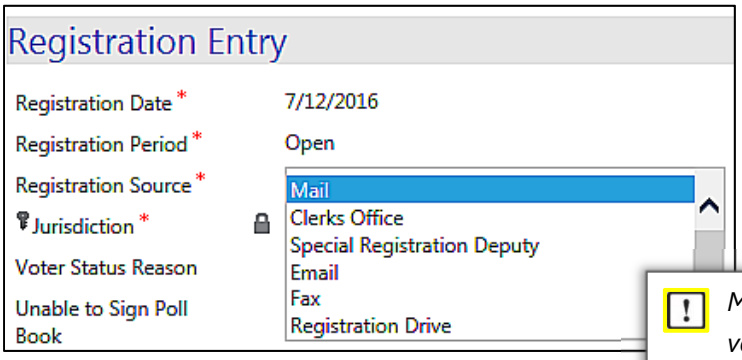
    Note: "Address Already Exists in Database" error may display after attempting to add a new address (see 7.2 Addresses)

14. Click the Different Mailing Address checkbox if a different mailing address was provided, then enter the mailing address

15. Enter the date the registration was effective in the Registration Date field

16. The Registration Period field can be changed from Open to Late; verify which registration period is appropriate

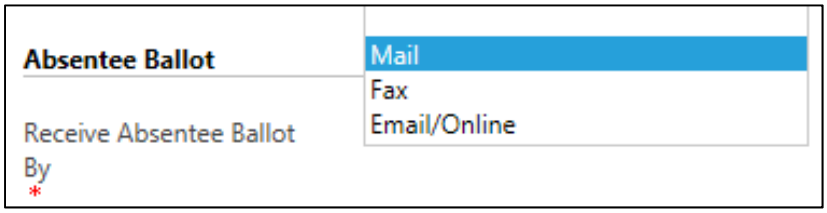
17. Click the Registration Source field and select the source of the voter registration application from the drop-down list



Military and Permanent Overseas voters are not required to provide proof of residence!

18. Click the Submitted FPCA checkbox

19. Click the Receive Absentee Ballot By field and select the method of transmission indicated
Note: This field will only display if the Submitted FPCA checkbox is selected



20. Click the Absentee Address Different checkbox if a FPCA mailing address was provided, then enter the FPCA absentee address

21. Click Save & Close to save the FPCA voter registration record and return to the Voter Registration Search page

An Absentee Application will automatically be created when a FPCA registration record is saved!
Go to the Absentee Applications tile to review the absentee application.

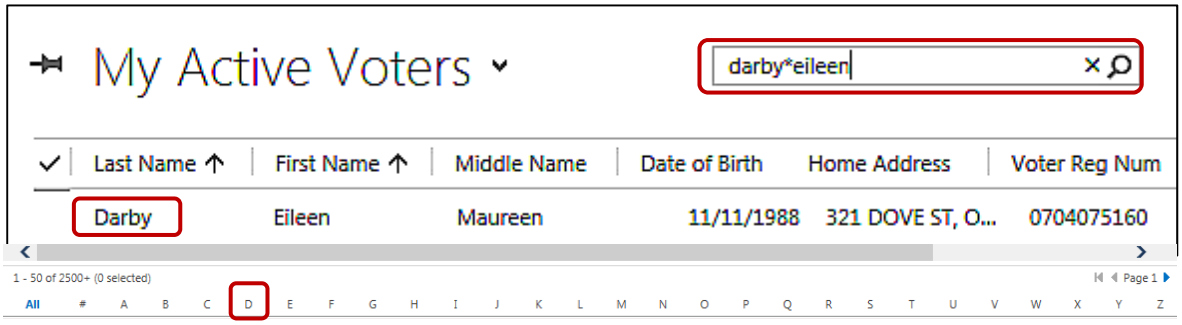
Confidential Voters

Individuals who are victims of domestic abuse or stalking have the option to apply for a confidential voter record status to prevent their names from appearing on poll lists, walking lists, and the MyVote Wisconsin website. Confidential electors are included in the poll book on a separate page, and are identifiable by the Confidential ID # assigned by the clerk.

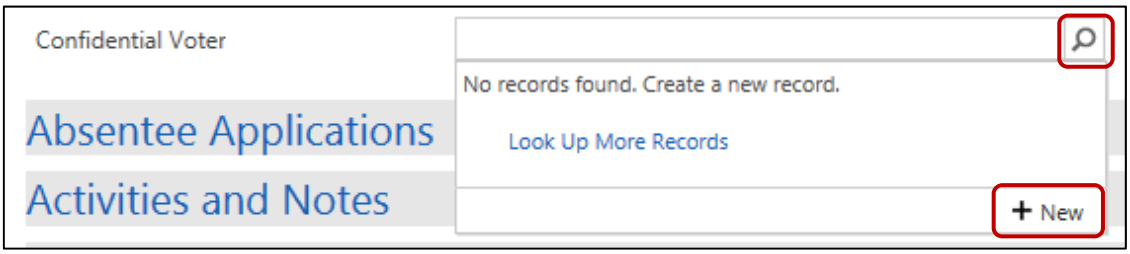
To apply for confidential status, a voter must provide the clerk a copy of a valid protective order, an affidavit signed by a sheriff or chief of police, or a statement signed by the operator of a residential shelter. After the voter has presented the qualifying documentation, they are issued a confidential elector identification card, and assigned a confidential elector number.

Change a Voter Record to Confidential Status

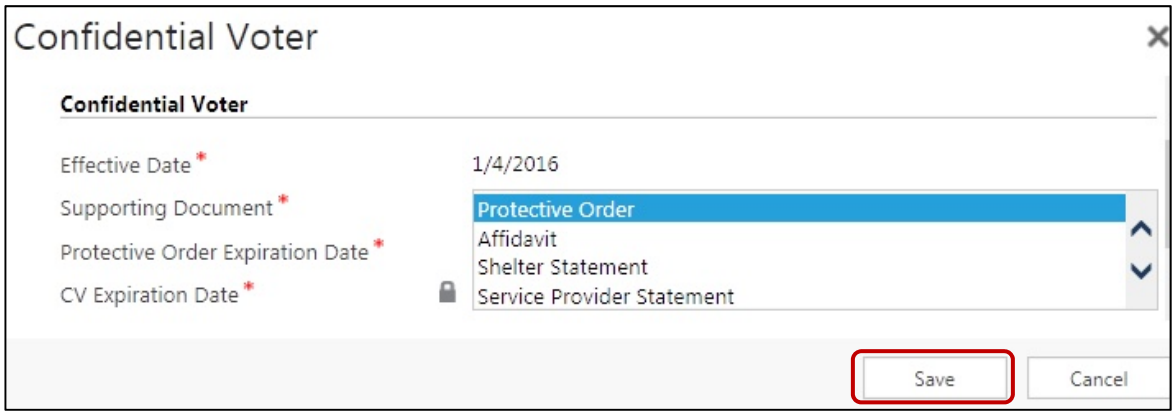
1. Click the Voter List tile
2. The *My Active Voters* view is the default display; enter the last*first name of the voter in the search bar, or select the first letter of the voters last name in the jump bar at the bottom of the page



3. Double click the name of the voter to open the Voter Record
4. In the Confidential Voter field, click in the field and press Enter or click the magnifying glass to open the record search window

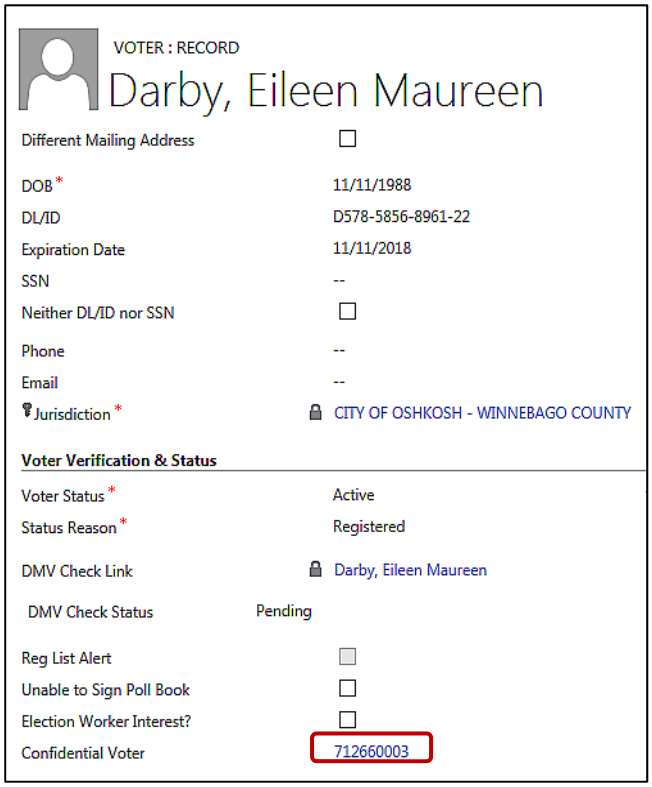


5. Click the +NEW button to create the confidential voter record
6. A confidential voter window will display at the top of the Voter Record, enter the confidential voter status Effective Date
7. Click the Supporting Document field and select the document type from the drop-down list
   Note: a supporting document expiration date will display if Protective Order is selected
8. Verify the automatically populated CV Expiration Status field, then click Save to save the confidential voter status and return to the Voter Record



9. In the Voter Record, review the Confidential Voter field and click Save & Close to return to the *My Active Voters* view

.



Any Active Confidential Voters can be found by clicking on the Confidential Voter tile on the Easy Navigate page

2.3 Voter Records

After a voter registration record is entered into WisVote, the voter search, voter list and voter registration tiles within the voter category will be used to access and update voter records. The voter record contains a voter's verification, status, registration, address, and absentee application information; election participation and registration history, and any mailing activities or personalized notes.

The voter list tile contains views for different categories of voters. By accessing the data in the voter list views, a list of voters in a particular jurisdiction can easily be viewed, exported and printed.

Voter List Tile – System Views

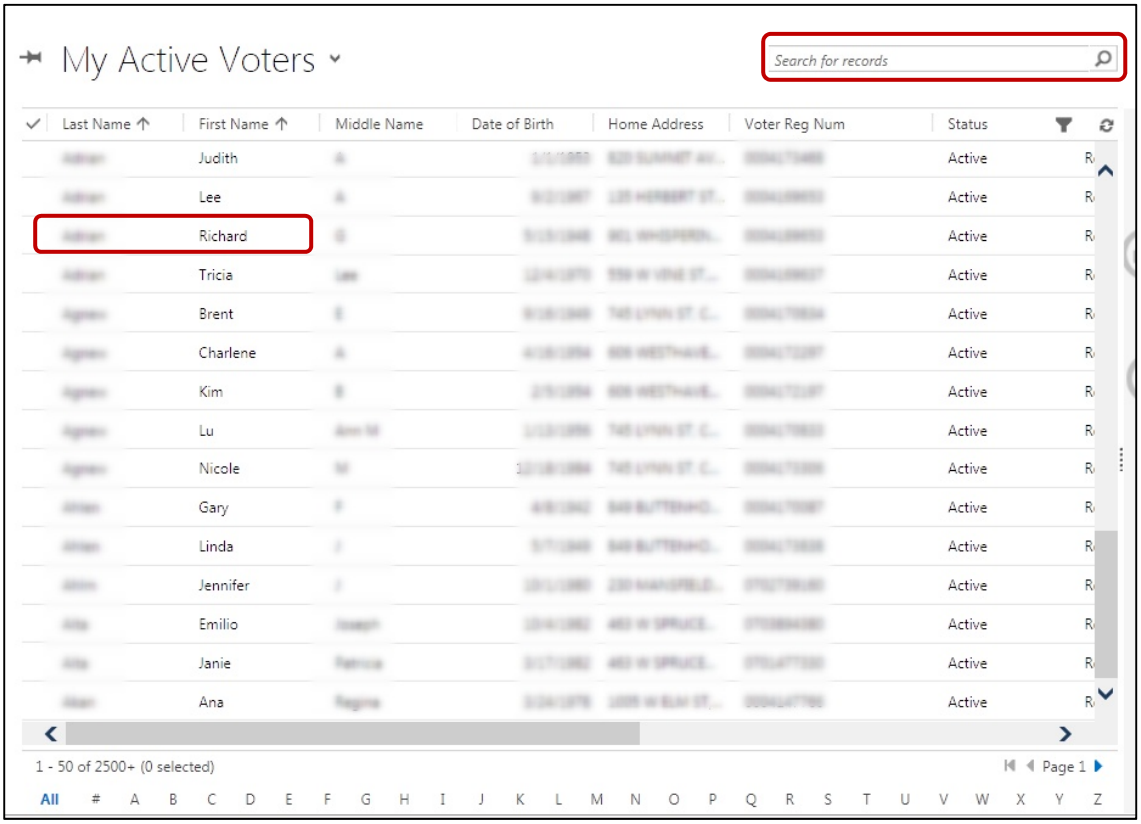
The Voter List tile has eight system views. The default view is My Active Voters. To switch views, click the name of the view and select the preferred view from the drop-down list.

Inactive Voters	Inactive voters in your jurisdiction
My Active Voters	Active voters in your jurisdiction; this is the default view
New Registrations Within the Last Week	Voter registrations entered by a specific user within the last week
Presidential Only Voters	Voters in your jurisdiction with an absentee application type of presidential only
UOCAVA Voters	Active voters in your jurisdiction with a voter type of military or overseas
Voters Who Need Proof of Residence	Active voters in your jurisdiction with a POR Provided field of *No*
Voters with Default Date of Birth	Active voters in your jurisdiction with a date of birth of 01/01/1900
Voters with Photo ID on File	Active voters in your jurisdiction with a Photo ID on File indicator of *Yes*
Create Personal View	Customize a view through the Advance Find tool

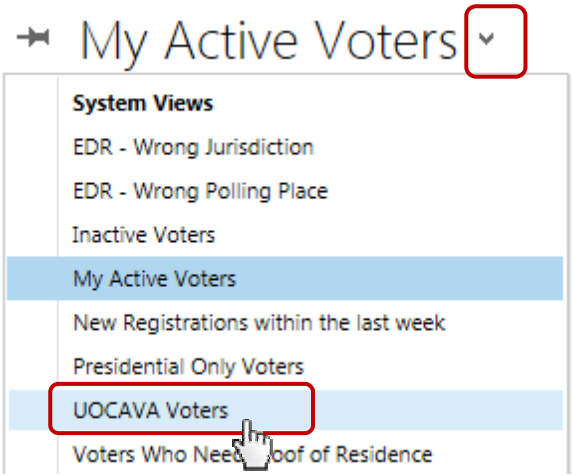
View and Export a List of Voters by Type

1. Click the Voter List tile to open the *Voter List* view page

The default view is *My Active Voters*; this view will display all of the active voters in your jurisdiction



1. To open the voter record, double click the name of the voter
2. To switch views, click the chevron and select the preferred view from the drop-down list



3. To export a voter list, click the, Export to Excel button at the top of the *Voter List* view page

4. If the screen is minimized and the Export to Excel button is not displayed, click the ••• button to open a drop-down list, then click Export to Excel

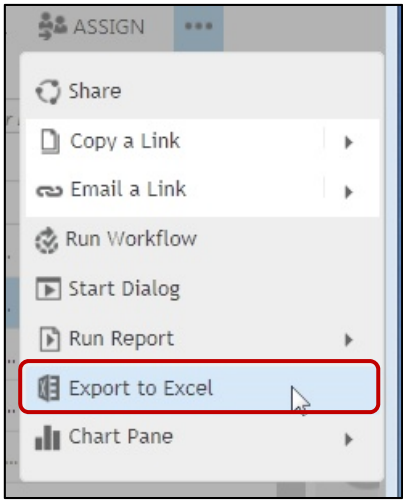
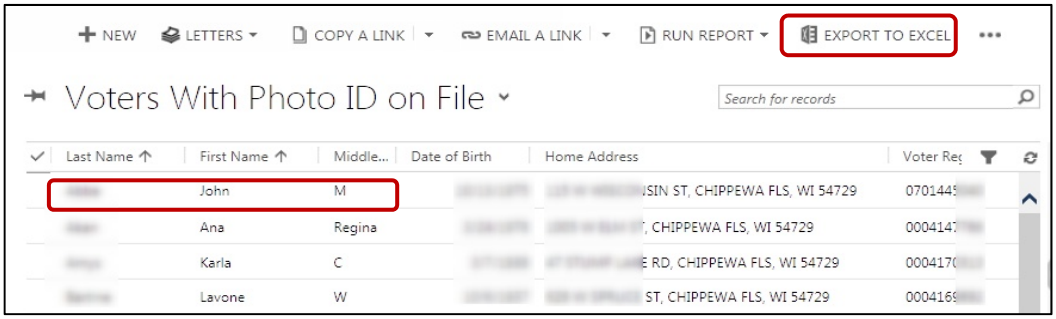


Photo Identification on File

Review and Export a List of Voters with Photo ID on File

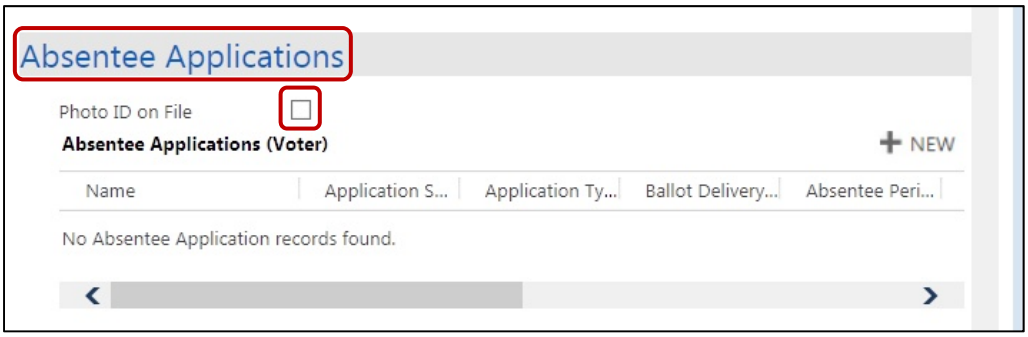
1. Click the Voter List tile to open the *Voter List* view page
2. Switch the view to *Voters with Photo ID on File*

3. To open the voter record, double click the name of the voter
4. To export a list of voters with photo ID on file, click the Export to Excel button at the top of the *Voter List* view page



Update a Photo ID Indicator

1. Open the Voter Record
2. Click the Absentee Applications tab on the Voter Record to expand the view
3. Select the Photo ID on File checkbox; to indicate the voter has submitted a valid photo ID
4. Click Save & Close to save the updated information and close the voter record



2.4 Registration List Alerts

The Federal Help America Vote Act (HAVA) requires that local election officials perform voter list maintenance on a regular basis to determine if any duplicate or ineligible individuals should be removed from the list. To identify ineligible voters in WisVote, election officials are required to review three types of voter registration list alerts: 1) Deceased, 2) Felon, and 3) Duplicate.

To comply with federal law and effectively maintain voter records, election officials should frequently review registration list alerts in WisVote.

Types of Voter Registration List Alerts

- **Deceased Alerts**

  WisVote generates deceased alerts by comparing voter records against the death records maintained by the Wisconsin Department of Health Services (DHS). If the voter information matches, a deceased registration list alert will be created and displayed in the "Needs Review – Active Voters" and "Needs Review – Deaths" views located within the Reg List Alert tile. A voter record must be deactivated in WisVote when a valid deceased registration list alert or documentation of the death is received.

- **Felon Alerts**

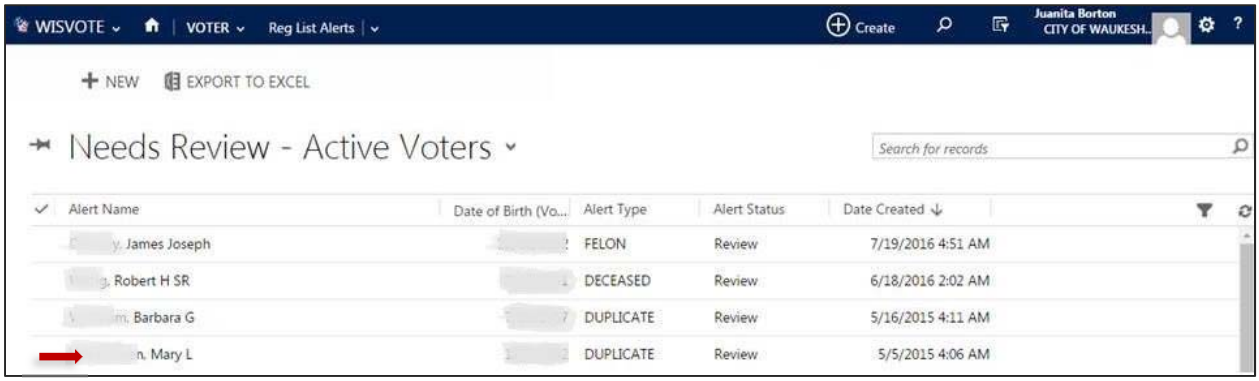
  WisVote generates felon alerts by comparing voter records against a list of felons provided by the Wisconsin Department of Corrections (DOC). If the voter information matches, a felon registration list alert will be created and displayed in the "Needs Review – Active Voters" and "Needs Review – Felons" views located within the Reg List Alert tile. A voter record must be deactivated in WisVote when a valid felon registration list alert is received and a Felon Ineligible Notification Letter sent to the voter when a voter record is deactivated because of a confirmed felon match.

- **Duplicate Alerts**

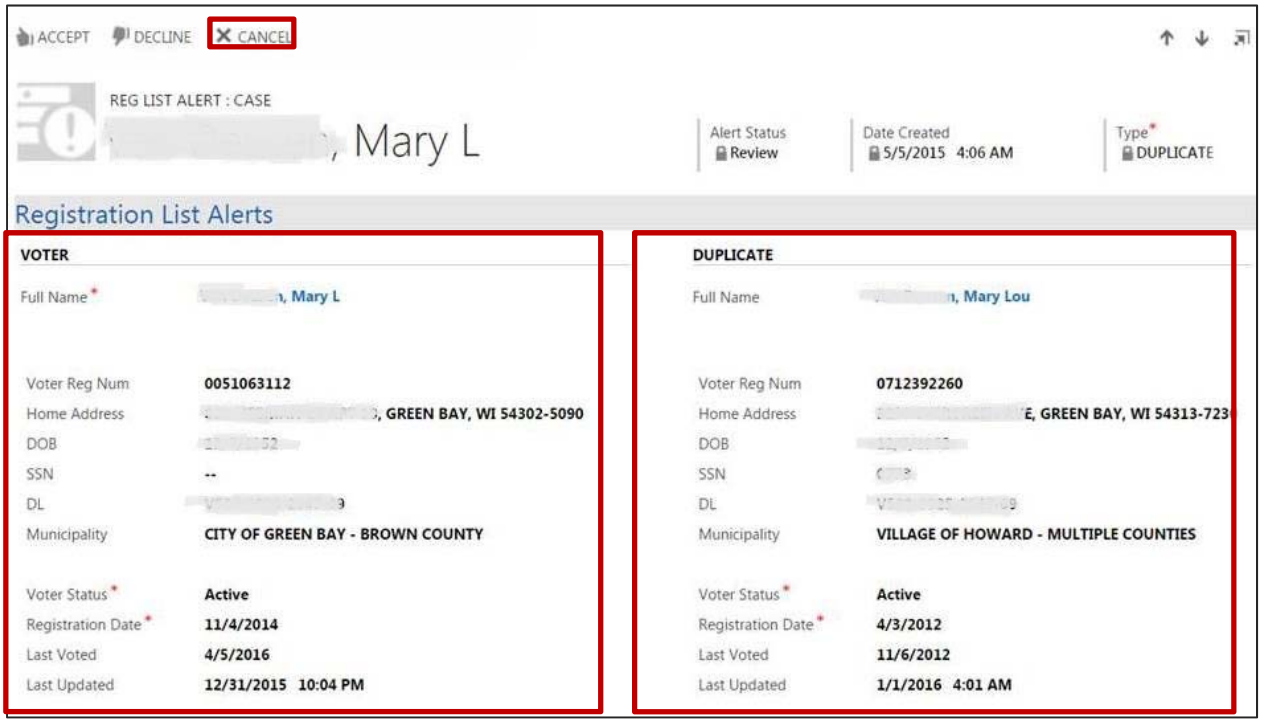
  HAVA requires that election officials perform voter list maintenance to help prevent the creation of duplicate voter records. WisVote automatically checks for duplicate records when a voter search is performed as part of the voter registration process. WisVote generates duplicate alerts by comparing the existing voter records against a list of new or updated voter records. If the voter information matches, a duplicate registration list alert will be created and displayed in the "Needs Review – Active Voters" and "Needs Review – Duplicates" views located within the Reg List Alert tile.

View a Registration List Alert

1. Click the Reg List Alerts tile
2. The Reg List Alerts view page will open and default to the, "Needs Review - Active Voters" view
3. Click the Alert Name to open the registration list alert



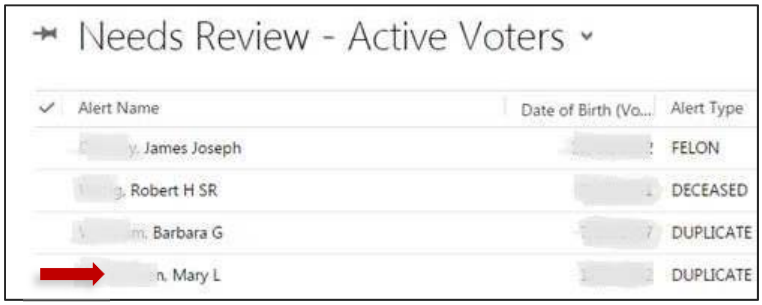
4. Compare the information in the voter record to the registration list alert type information to determine if the records match
5. To accept or decline the alert at a different time, or to return to the view page, click the Cancel button



Decline a Registration List Alert

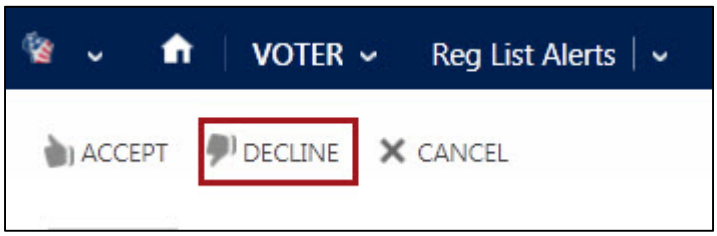
1. Click the Reg List Alerts tile
2. Click the Alert Name to open the registration list alert

3. Click the name of the voter in the "Needs Review - Active Voters" view to open the registration list alert



4. Compare the information in the voter record to the registration list alert type information to determine if the records match

5. If the records do not match, click the decline button to decline the registration list alert



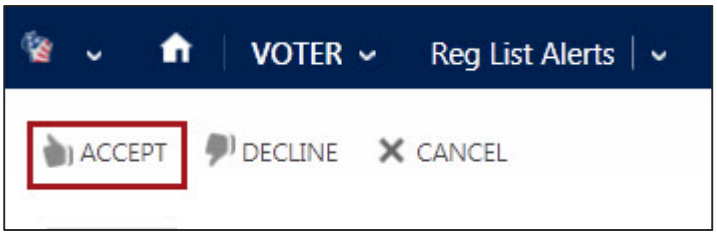
6. To review the declined registration list alert, change the view to "Declined List Alerts"

Accept a Duplicate Alert

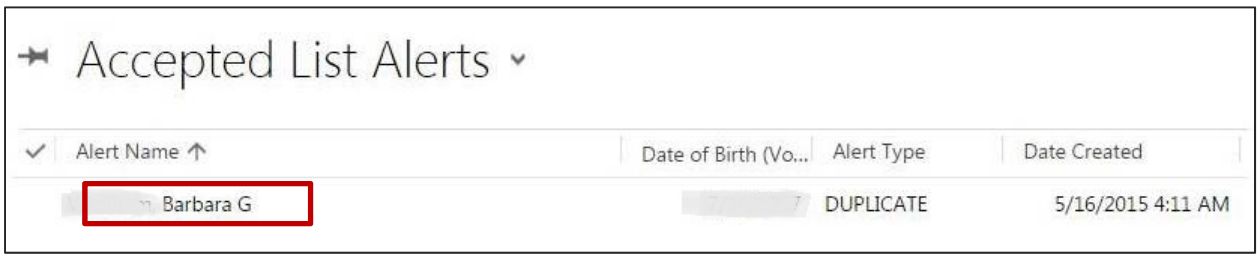
1. Click the Reg List Alerts tile

2. Click the name of the voter in the "Needs Review - Active Voters" view to open the duplicate alert

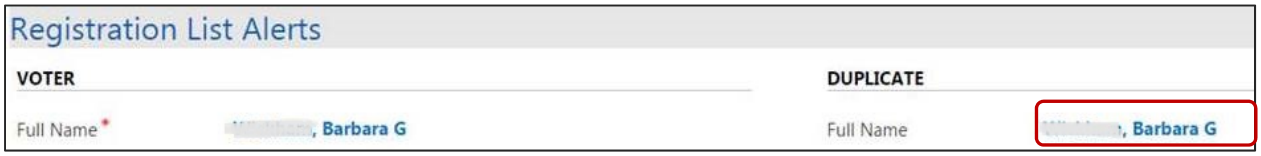
3. Compare the primary voter record to the duplicate voter record to determine if the records match
4. If the records match, click the accept button to accept the duplicate alert and merge the voter records



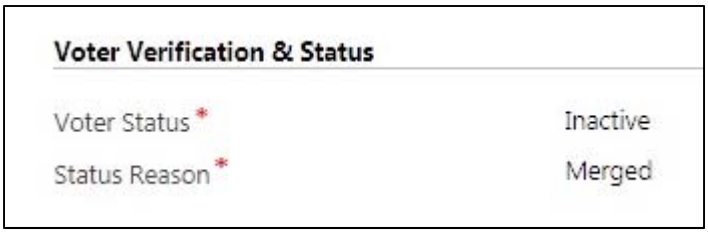
5. To review the accepted duplicate alert, change the view to "Accepted List Alerts"
6. Click the name of the voter to open the registration list alert case



7. To confirm the records were merged, open the Duplicate voter record by clicking the Full Name on the right side of the alert case.



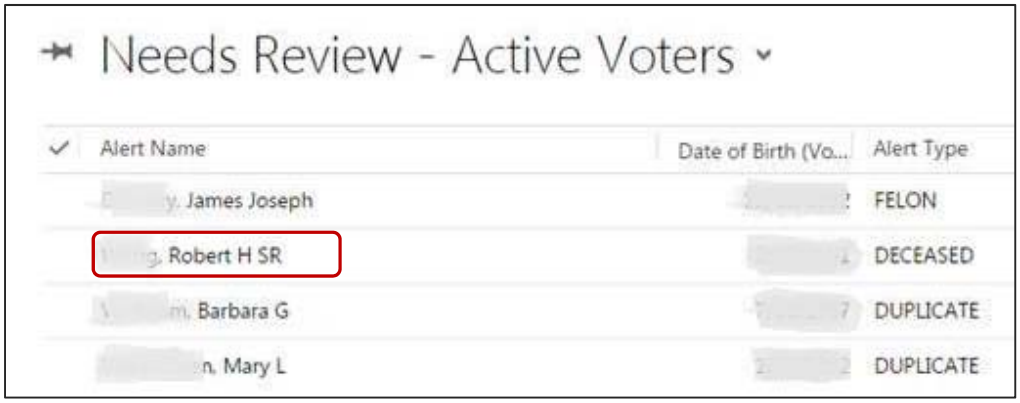
8. Review the Voter Verification & Status fields on the duplicate voter record to confirm the voter status is inactive and the status reason is merged



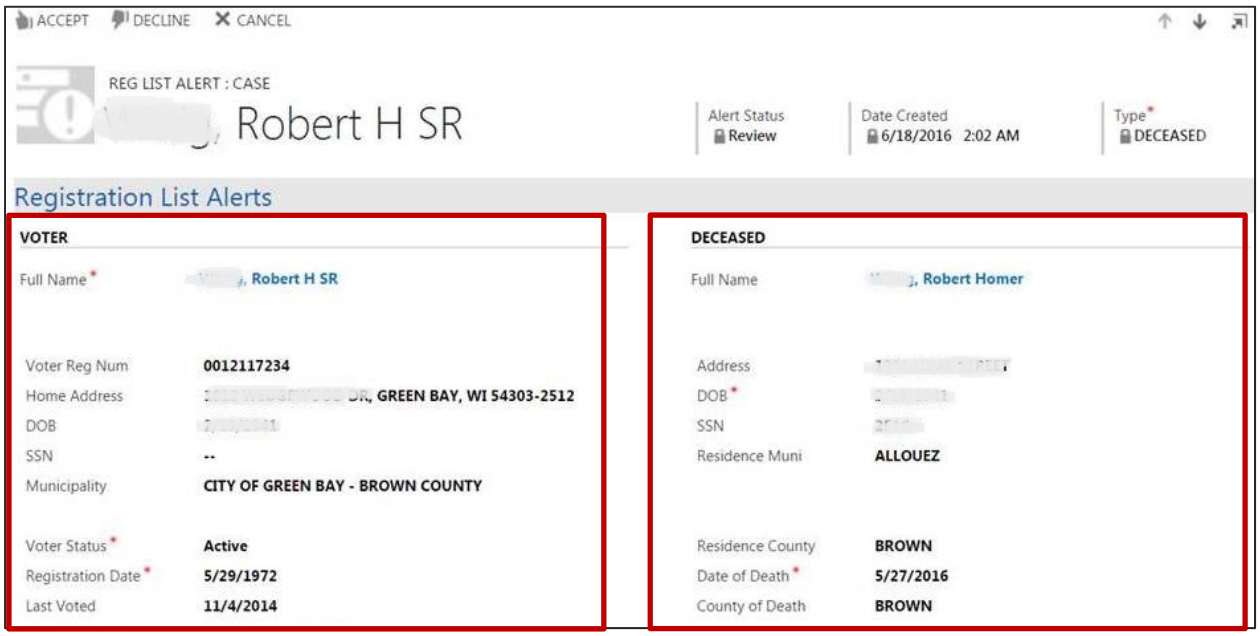
Accept a Deceased Alert

1. Click the Reg List Alerts tile

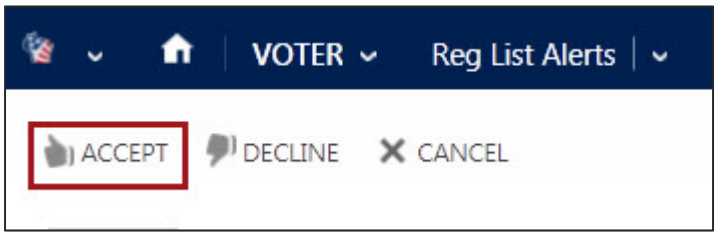
2. Click the name of the voter in the "Needs Review - Active Voters" view to open the deceased alert



3. Compare the information in the voter record to the deceased record to determine if the records match



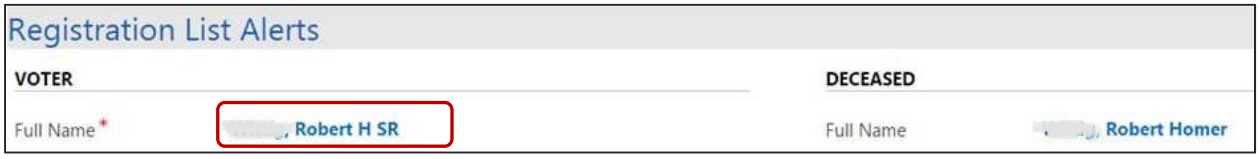
4. If the records match, click the accept button to accept the deceased alert and inactivate the voter record



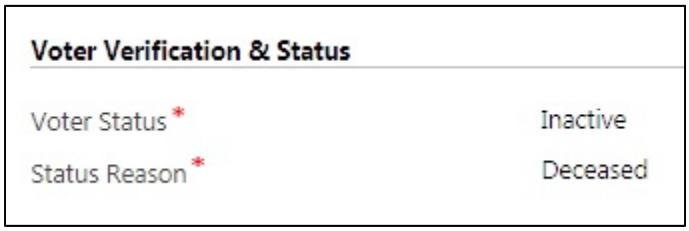
5. To review the accepted deceased alert, change the view to "Accepted List Alerts"

6. Click the name of the voter to open the alert case.

7. To open the voter record, click the Full Name of the voter on the left side of the alert case.

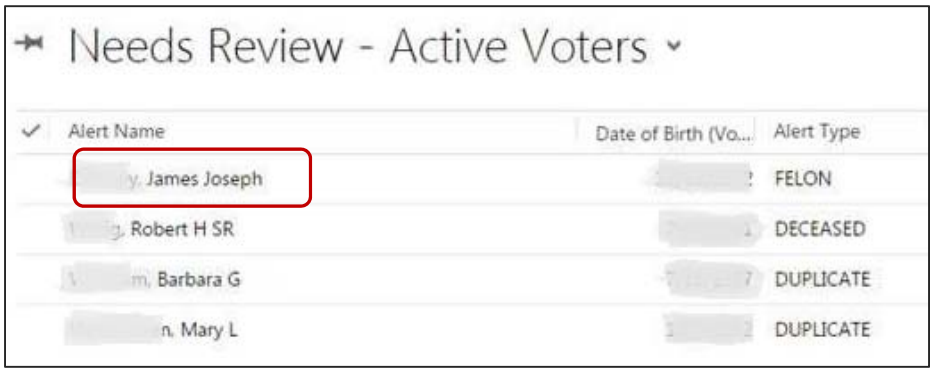


8. Review the Voter Verification & Status fields on the duplicate voter record to confirm the voter status is inactive and the status reason is deceased

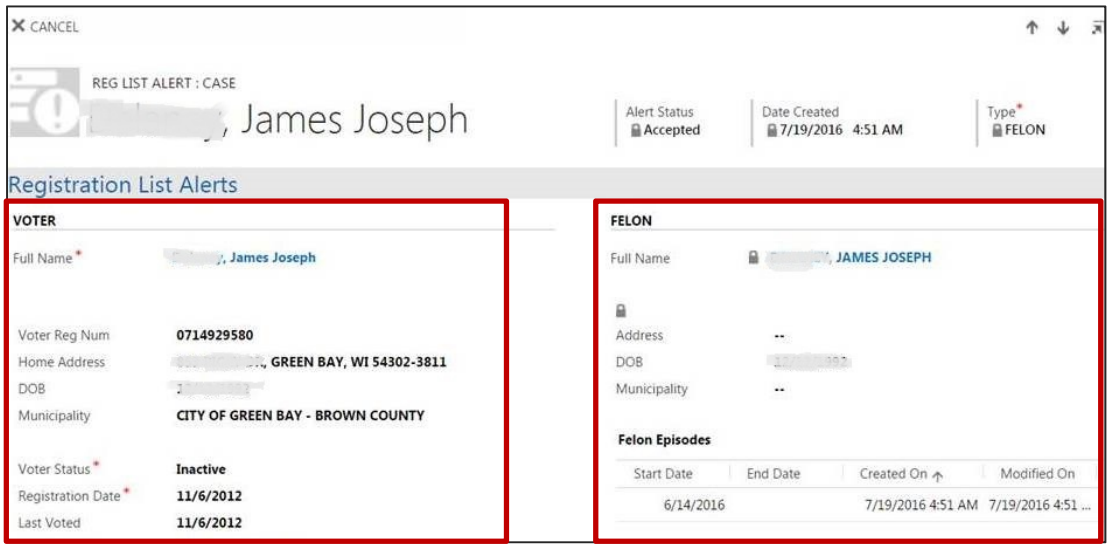


Accept a Felon Alert

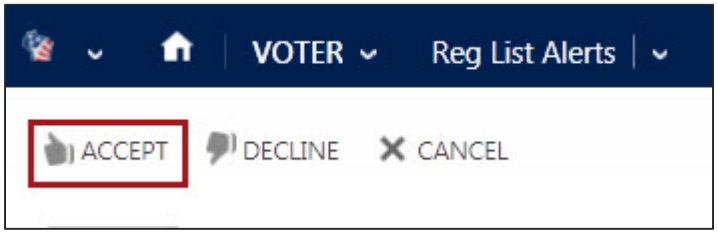
1. Click the Reg List Alerts tile
2. Click the name of the voter in the "Needs Review - Active Voters" view to open the felon alert



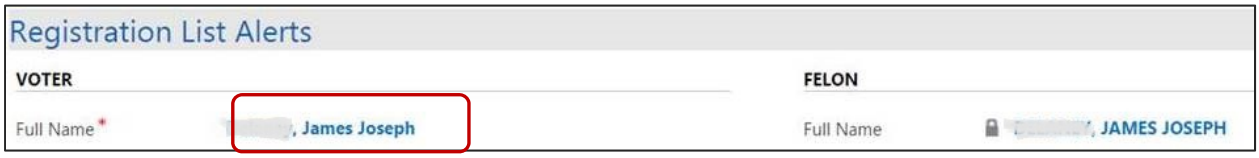
3. Compare the information in the voter record to the felon record to determine if the records match



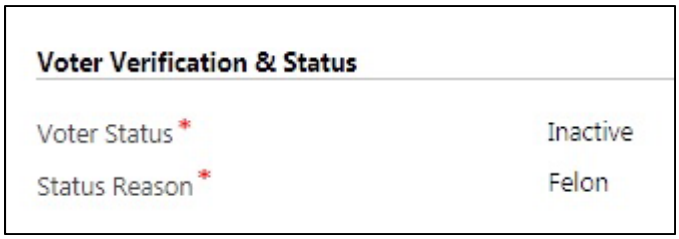
4. If the records match, click the accept button to accept the felon alert and inactivate the voter record



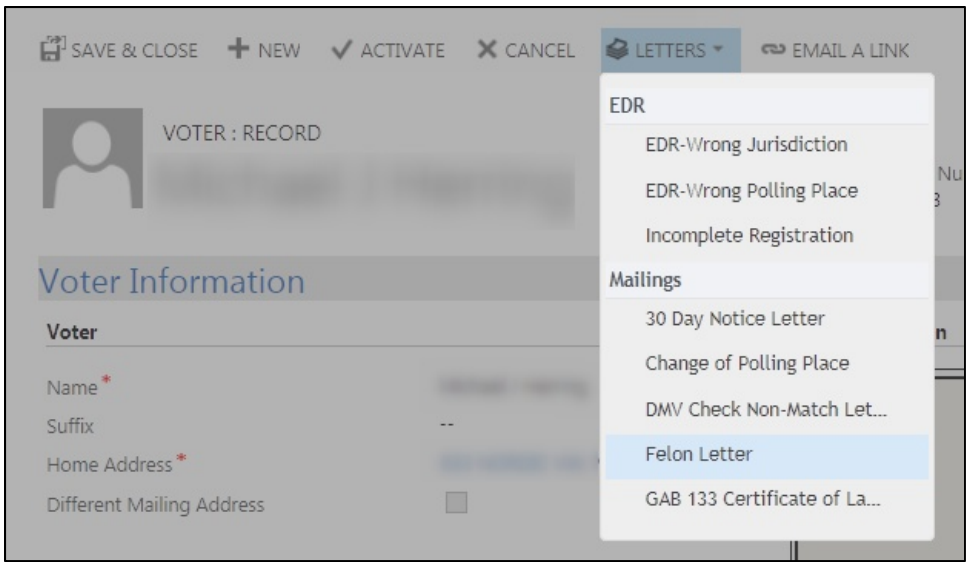
5. To review the accepted felon alert, change the view to "Accepted List Alerts"
6. Click the name of the voter to open the alert case
7. Click the voter's name on the left side of the alert case to open the voter's record



8. Review the Voter Verification & Status fields on the voter record to confirm the voter status is inactive and the status reason is felon



9. To send a felon letter, click the, Letters button at the top of the voter record and select the Felon Letter from the drop-down list



2.5 DMV Checks

A DMV check, commonly referred to as a HAVA check, compares the name, date of birth and driver's license or social security number of a voter record against the information in the Wisconsin Department of Transportation (DOT) database and Social Security Administration (SSA) database. If the information entered into WisVote is not identical to the information in the DOT or SSA database, the check will fail. The results of a failed check are categorized as a non-match, and a reason for the non-match is given.

When a new or updated voter registration is processed, the information is sent from WisVote to the DOT and SSA once a day. After the DMV Check is complete, the results categorized as a non-match are displayed in the "DMV Check Non-Matches" view located within the DMV Check tile. The results of a DMV check do not affect an elector's right to vote.

DMV Checks Tile - System Views

The DMV checks tile has four system views. The default view is DMV-Checks Non-Matches. To switch views, click the name of the view and select the preferred view from the drop-down list.

DMV Checks – Non-Matches	DMV Checks categorized as a non-match; default view
DMV Checks Pending	DMV Checks submitted in WisVote but not yet processed by DOT and SSA
Letter Sent	Reviewed DMV Checks that resulted in the voter being sent a non-match letter
No Further Action Required	Reviewed DMV Checks that resulted in no further action required

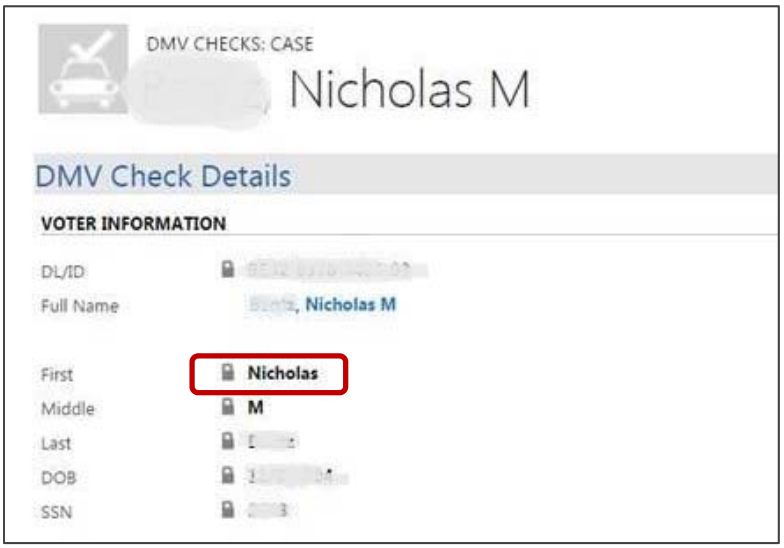
DMV Check – Non-Match Reasons

WI Department of Transportation Codes	Social Security Administration Codes
1-All Fields Match	S-Invalid Data Submitted
2-Name and DOB Do Not Match	T-Multiple Matches - All Dead
3-Name Does Not Match	V-Multiple Matches - At Least One Alive and One Dead
4-DOB Does Not Match	W-Multiple Matches - All Alive
5-No Record of DL Number	X-Single Match – Alive
6-Invalid Format of DL Number	Y-Single Match – Dead
7-Invalid Name	Z-No Matches Found
8-Invalid DOB	

Review a DMV Check

1. Click the DMV Checks tile
2. The DMV Checks View page will open and default to the, "DMV Checks Non-Matches" view
3. Click the name of the voter in the DMV Check Name field to open the DMV Check Case

4. Compare the Voter Information fields with the voter registration information submitted by the voter to determine if a data entry error caused the check to fail
5. If a data entry error was made, click the Full Name field on the DMV Check Case to open the voter record



6. Correct the data entry error on the voter record, then click Save & Close; the updated voter information will be sent to the DOT and SSA to run another DMV Check

Send a DMV Check Non-Match Letter

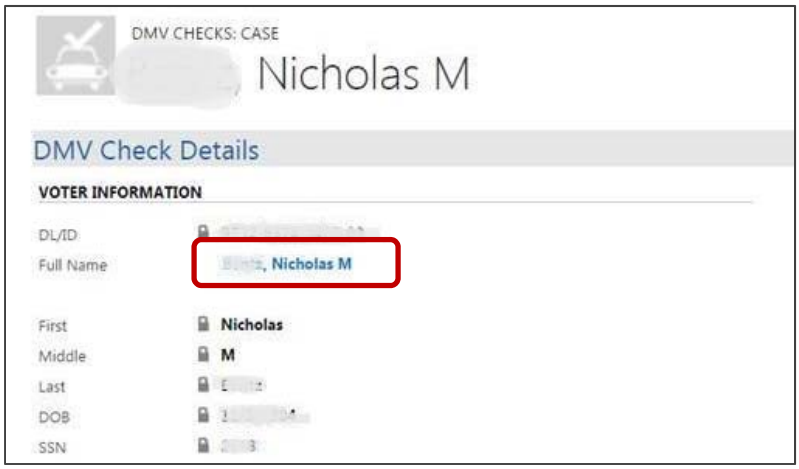
If a data entry error was not the cause of a failed DMV check, a DMV Check Non-Match letter must be sent to the voter to notify them of the discrepancy between the information in their voter record and the information in their DOT or SSA record.

After the DMV Check Non-Match letter is sent to the voter, the responsibility falls on the voter to verify the information. However, the results of the DMV Check will not affect the voter's eligibility to vote.

1. Click the Reg List Alerts tile

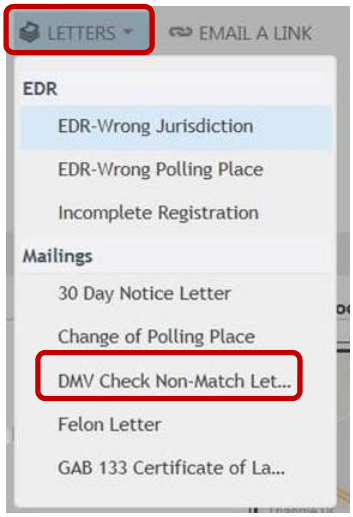
2. Click the name of the voter in the DMV Check Name field to open the DMV Check Case

3. Click on the Full Name of the Voter to open the voter record.



4. When the Voter Record is opened, click Letters to view the Letter's menu.

5. Click DMV Check Non-Match Letter



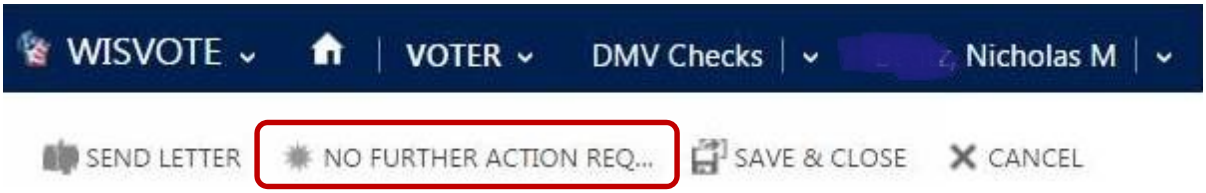
6. When the letter opens, choose to print or export the letter to a Word document or Adobe PDF. Letters exported to Word may be easily edited.

7. After the letter has been sent through the voter record, a Note is generated and may be viewed on the voter record under the Notes and Activities tab.

8. After printing or exporting the letter, click Cancel on the voter record.

9. Click the green button to Continue.

10. When the DMV Non-Match case is opened, click No Further Action Required



NOTE: The Send Letter function on the DMV Non-Match case is currently under development.

11. Change the view to see cases that have been marked No Further Action Required.

Using No Further Action Required When Letter is Not Sent to the Voter

When there is no data entry error, but a clear explanation exists for why the DMV Check returned a Non-Match, No Further Action Required may be selected without sending a letter to the voter.

For example: The voter has a hyphenated last name and the hyphen is included on their EL-131 form. The voter also provided a copy of their driver license as part of an absentee ballot request. Upon review, the driver license does not contain the hyphen and everything else on the driver license matches the information from the EL-131. In a case such as this, there would be no need to send the letter to the voter. Instead follow these steps:

1. Click the Reg List Alerts tile
2. Click the name of the voter in the DMV Check Name field to open the DMV Check Case
3. When the DMV Non-Match case is opened, click No Further Action Required

3.1 Types of Absentee Applications

This section details the proof of identification, duration of request, application requirements and definitions for the following seven types of absentee applications:

- Regular
- Indefinitely Confined
- Permanent Overseas
- Military
- Presidential Only
- Hospitalized
- Sequestered Juror

Regular Absentee Applications

Definition: Any otherwise qualified voter who for any reason is unable or unwilling to appear at the polling place.

Proof of Identification:

- By mail applications must include proof of identification with the application in order for an voter to receive a ballot
- Proof of identification may be provided only once (unless the voter re-registers with a new name or address)
- If proof of identification has previously been provided by a regular voter, the clerk must initial the absentee ballot certificate envelope prior to sending the absentee ballot to indicate the voter has met the proof of identification requirement

In WisVote:

- Provider clerks track the voters who provide proof of identification
- Prior to issuing absentee ballots, provider clerks send a list of the regular absentee voters who have previously provided proof of identification to their relier clerks
- Relier clerks send their current list of regular absentee voters who have provided proof of identification to their provider clerks

Duration of Request:

- A specific election
- All elections within a calendar year
  - If a regular voter does not return their absentee ballot, the request is canceled
  - Send notice of cancellation by mail within 5 days
  - Voter can reactivate the request

Application Requirements:

- Absentee applications for regular voters must be received by 5:00 p.m. on the Thursday prior to the election

Indefinitely Confined Absentee Applications

Definition: Voters indefinitely confined due to age, infirmity, disability or illness. The voter must have applied for an absentee ballot as an indefinitely confined voter.

Proof of Identification:

- Exempt from proof of identification requirement
- The witness signature on the absentee ballot certificate envelope satisfies the proof of identification requirement for indefinitely confined voters
- The clerk must initial the absentee ballot certificate envelope prior to sending the absentee ballot to indicate the voter has met the proof of identification requirement

Duration of Request:

- Indefinitely confined voters receive ballots for all elections
- If a ballot is not returned after a spring or general election, a letter informing the voter that the absentee request will be canceled unless the voter applies for renewal within 30 days is mailed to the voter
    - If the voter responds to the letter, the indefinitely confined application stays active
    - If the voter does not respond to letter, the indefinitely confined application is cancelled

Application Requirements:

- Absentee applications for indefinitely confined voters must be received by 5:00 p.m. on the Friday prior to the election
- Voters must indicate on the application they are indefinitely confined

Overseas Absentee Applications

Definition: A voter who is permanently outside of the U.S. with no intent to return to their residence; may only vote for federal offices: President, U.S. Senate and U.S. Congress. May receive their ballot online through MyVote or by fax, email or mail.

Proof of Identification:

- Exempt from proof of identification requirement
- The clerk must initial the absentee ballot certificate envelope prior to sending the absentee ballot to indicate the voter has met the proof of identification requirement

Duration of Request:

- A specific election
- All elections within a calendar year

Application Requirements:

- Absentee applications for overseas voters must be received by 5:00 p.m. on the Thursday prior to the election
- Voter registrations must be postmarked no later than the 20th day prior to the election
- Exempt from Proof of Residency requirement
- Voter must have lived in the district immediately before moving overseas
- Voting-age children of overseas voters are eligible even if they have never lived in the district
- Vote from the last address in the district

Military Absentee Applications

Definition: Members of a uniformed service (at home or away), members of the merchant marine, civilian employees of the United States serving abroad, peace corps volunteers, and their spouses and voting-age dependents. Military voters are eligible to receive ballots for all offices and may receive their ballot online through MyVote or by fax, email or mail.

Proof of Identification:

- Exempt from proof of identification requirement
- The clerk must initial the absentee ballot certificate envelope prior to sending the absentee ballot to indicate the voter has met the proof of identification requirement

Duration of Request:

- A specific election
- All elections within a calendar year

Application Requirements:

- A voter registration form is not required
- Must have resided in the municipality immediately before entering the military
- Absentee applications must be received by 5:00 p.m. on the Friday prior to the election
- For federal elections, military voters away from their residence due to active duty have until 5:00 p.m. on Election Day to request an absentee ballot
- The Federal Post Card Application (FPCA) is a common form used by military voters; it serves as both a voter registration form and absentee ballot application

Presidential Only Absentee Applications

Definition: Any new residents of Wisconsin, who are eligible to vote but do not meet the 10-day residency requirement; or former qualified electors of Wisconsin, who have moved to another state within 24 months but are not eligible to vote in their new state, may apply for a Presidential Only Ballot.

Proof of Identification:

- Proof of identification is required for both former and new Wisconsin residents

Application Requirements for Former Wisconsin Residents:

- Applications for Absentee Presidential Ballot is requested from, and submitted to the municipal clerk of the voter's prior Wisconsin residence
- No deadline to submit the application, but must be received, "in sufficient time for a ballot be mailed and returned prior to the election"

Application Requirements for New Wisconsin Residents:

- A voter registration form is not required
- Proof of residence is required
- Application for Absentee Presidential Ballot requests can be made in-person at clerk's office where they voter resides, or at the polling place on Election Day
- In-person requests at the municipal clerk's office can be made no sooner than 27 days prior to the election, and no later than 5:00 p.m. on the day before the election

Hospitalized Absentee Applications

Definition: Any qualified voter may register and request an absentee ballot by agent if hospitalized.
Proof of Identification: ▪ Proof of identification is required with the application unless otherwise exempt
Application Requirements: ▪ Absentee applications can be made no sooner than 7 days prior to the election, and no later than 5:00 p.m. on Election Day ▪ Absentee applications must indicate the voter is hospitalized ▪ The hospitalized voter may register to vote by agent up to 5:00 p.m. on Election Day ▪ Proof of residence is required

Sequestered Juror Absentee Applications

Definition: Any eligible registered voter may request an absentee ballot if a sequestered juror.
Proof of Identification: ▪ Proof of identification is required with the application unless otherwise exempt
Application Requirements: ▪ Absentee applications must be received by 5:00 p.m. on Election Day

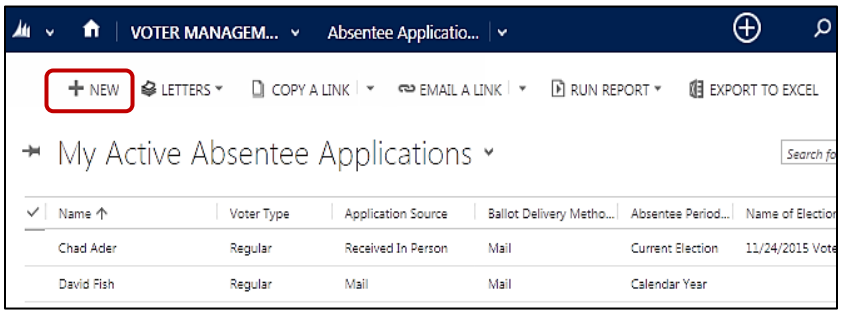
3.2 Add an Absentee Application

Before entering a new absentee application, the voter must have a voter record in WisVote. Because military voters are not required to register to vote before requesting an absentee application, if a military voter does not have a voter record, the system will create one from the information on the absentee application.

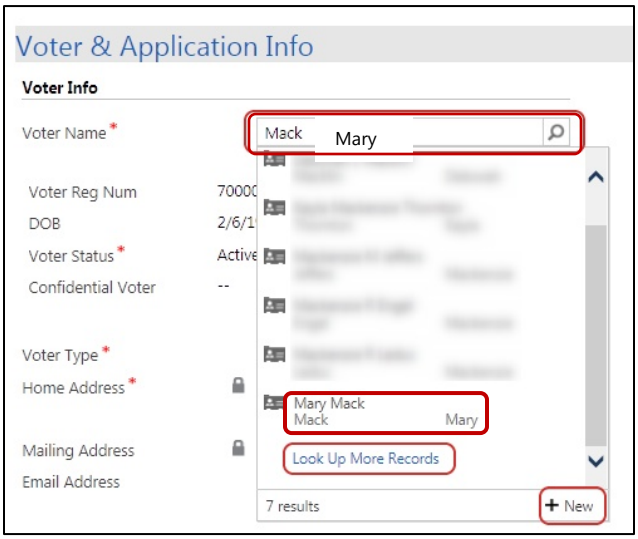
Only enter complete absentee applications into WisVote. An absentee application must include the following information to be complete: date(s) of the election(s), residential address, municipality, mailing address (optional), and the name of the voter requesting the ballot.

Add an Absentee Application

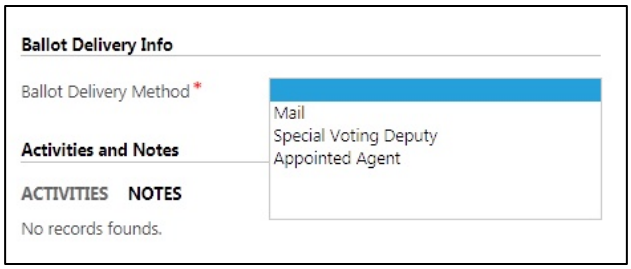
1. Click the Absentee Applications tile
2. Click the +New button to open a new Absentee Application form



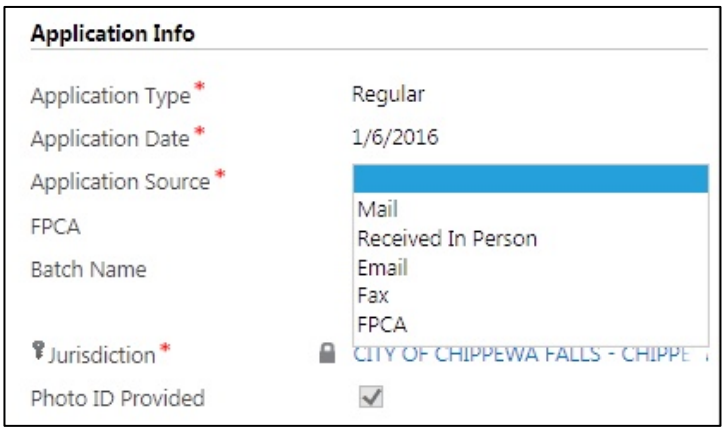
3. In the Voter Name field, enter the first and last name of the voter to search for the voter record
4. If the voter record is not found in the drop-down list, click "Look Up More Records" to display more records or refine the search parameters
   a. If a matching voter record is still not found, click the +New button in the Look Up Record window to add a new voter registration
   b. After the new voter form is complete, the system will return to the absentee application with the new voter information section of the application populated
5. If the voter record is found in the drop-down list of search results, click the voter record to assign the new absentee application to the voter



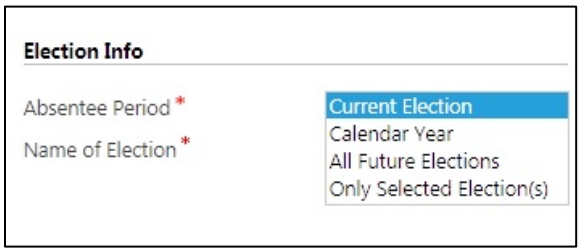
6. Verify the voter information on the new absentee application form is correct; update any inaccurate information
   Note: Information updated and saved on the new absentee application form will automatically be updated on the voter record
7. Enter an email address (optional)
8. Select the Ballot Delivery Method
9. Select the Application Type
   Note: If the voter type is Military, Overseas, or Presidential Only, the application type will automatically default to the voter type



10. Select the Application Source
11. Check the FPCA box if the application was submitted on a Federal Post Card Application
12. Enter a Batch Name (optional)
13. Check the Photo ID Provided box if the applicant has provided a photocopy of their proof of identification. If the applicant has previously provided their proof of identification, the Photo ID Provided box will be checked



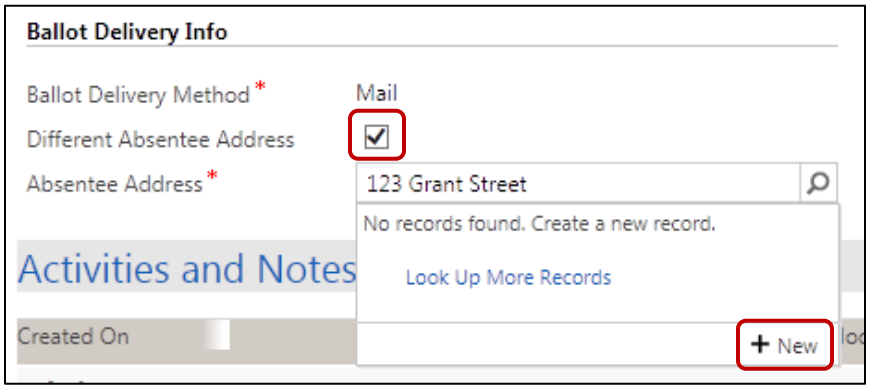
14. Select the Absentee Period for the request; additional Election Info fields will display when the absentee period is chosen



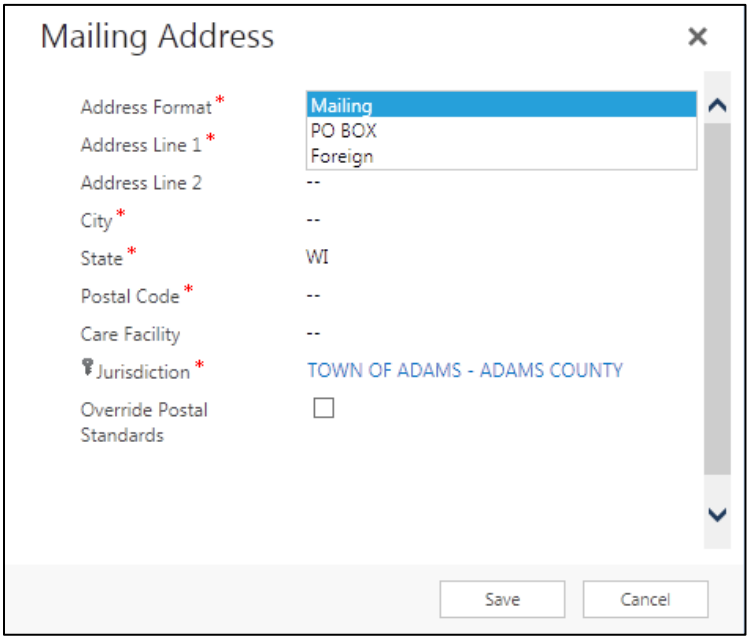
15. Click Save to save and review the absentee application ,or Save & Close, to save and return to the Absentee Application View page

Mail an Absentee Ballot to a Different Address

1. Follow steps 1 through 7 of *Add a New Absentee Application*
2. After selecting the Ballot Delivery Method of Mail, check the Different Absentee Address box if the voter is requesting the ballot be sent to an address different from the mailing or home address
3. Type the address in the Absentee Address field, then press enter; if the address is not found, click the +New button to enter a new mailing address



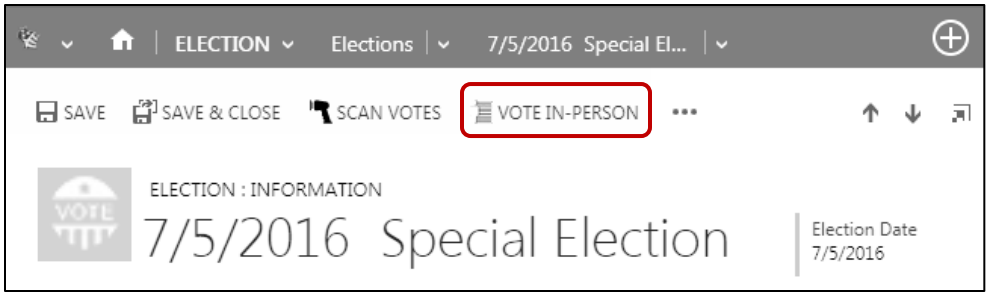
4. Select Mailing, PO Box or Foreign in the Address Format field
5. Enter the Address
6. Enter City, State, and Postal Code
7. Check the Override Postal Standards box if the address entered is valid but will not conform to postal standards
8. Click Save to save the address and return to the absentee application



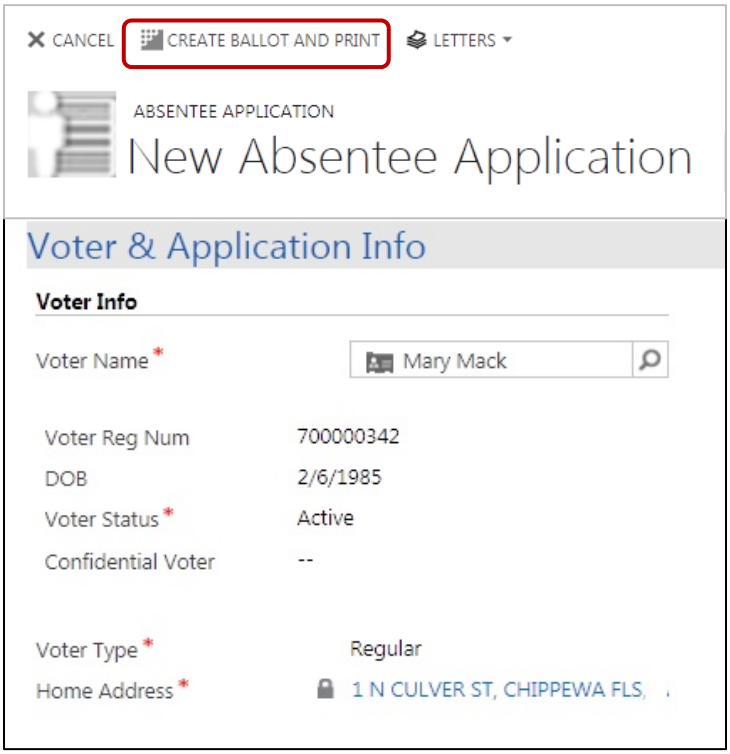
Add an In-Person Absentee Application

When the in-person absentee period begins, an absentee application request for a specific election automatically becomes an application for in-person absentee voting only. All of the data fields within the absentee application are defaulted to reflect in-person absentee voting. An election official can search for a voter and select an option for printing or not printing a label.

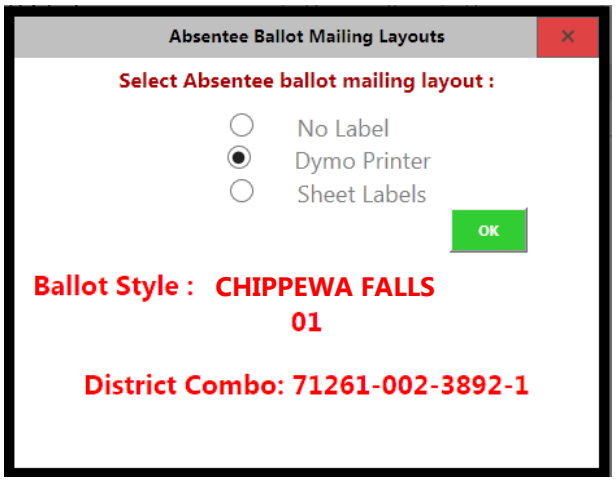
1. Click the Elections tile
2. Click the Name of the Election
3. Click the Vote In-Person button at the top of the page to open a New Absentee Application form

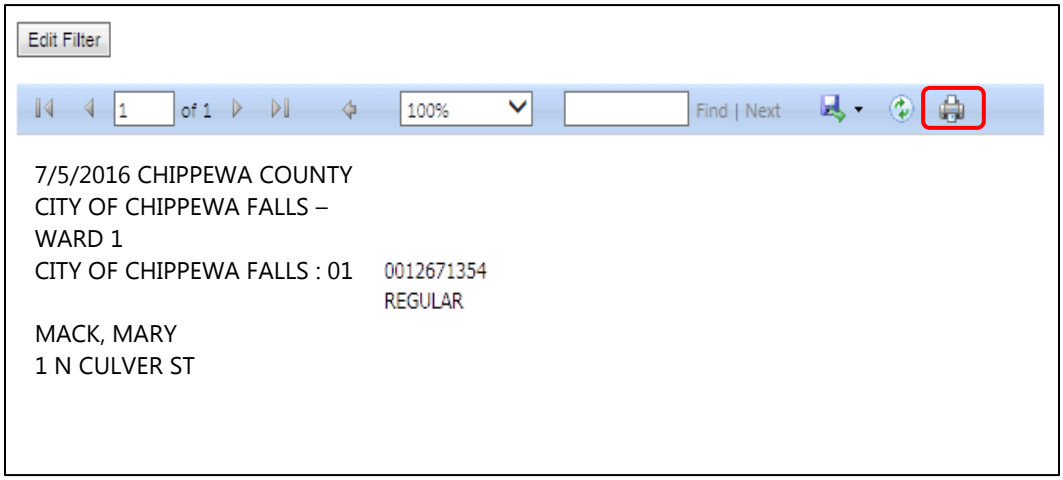


4. Enter the first and last name of the voter in the Voter Name field to search for the voter record
5. If the voter record is not found in the drop-down list of search results, click "Look Up More Records" to display more records or refine the search parameters
6. If the voter record is found, click the voter record to assign the new absentee application to the voter
7. Verify the voter information on the absentee application form is correct; update any inaccurate information
8. Click the Create Ballot and Print button at the top of the absentee application to issue an absentee ballot



9. To print a mailing label, select Dymo Printer or Sheet Label; click OK
10. To record the ballot as sent in WisVote without printing a mailing label select No Label; click OK
11. If the Dymo Printer or Sheet Label option was selected, the mailing label will generate and display in a generate report window
12. Click the Print button in the generate report window to print the absentee mailing label



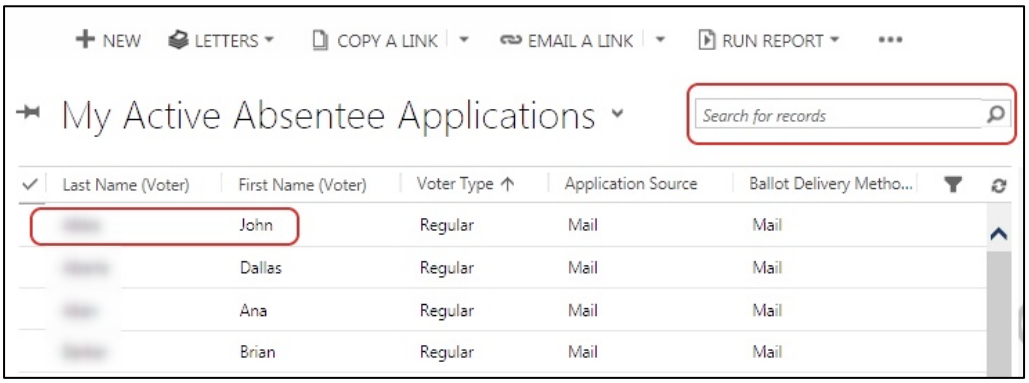


3.3 Search for an Absentee Application

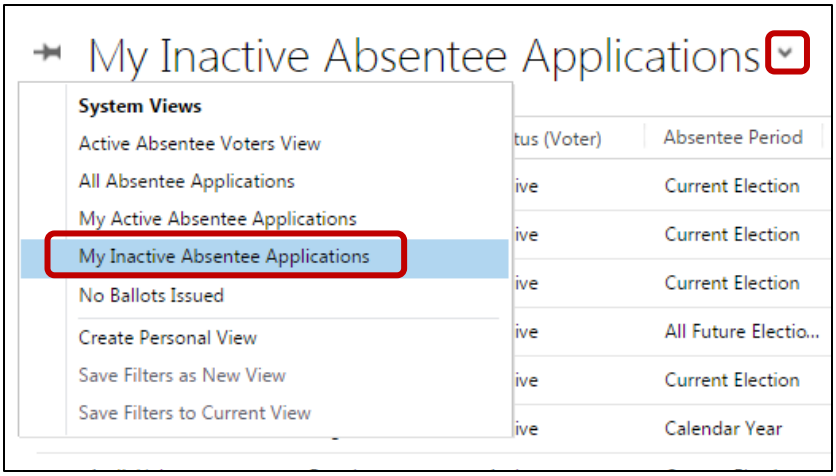
The absentee application search function in WisVote can be used to search for and update an active or cancelled absentee application. There are two ways to search for absentee applications in WisVote; 1) from the Absentee Applications tile located within the Voter Management category on the navigation page, and 2) from the Absentee Applications tile located within a specific election.

Search for an Absentee Application from the Absentee Applications Tile

1. Click the Absentee Applications tile
2. The "My Active Applications" view will display all active applications for both current and future elections
3. To search for an active absentee application, enter the name of the voter in the search field, then press enter
4. Click the name of the voter in the view grid to open the absentee record



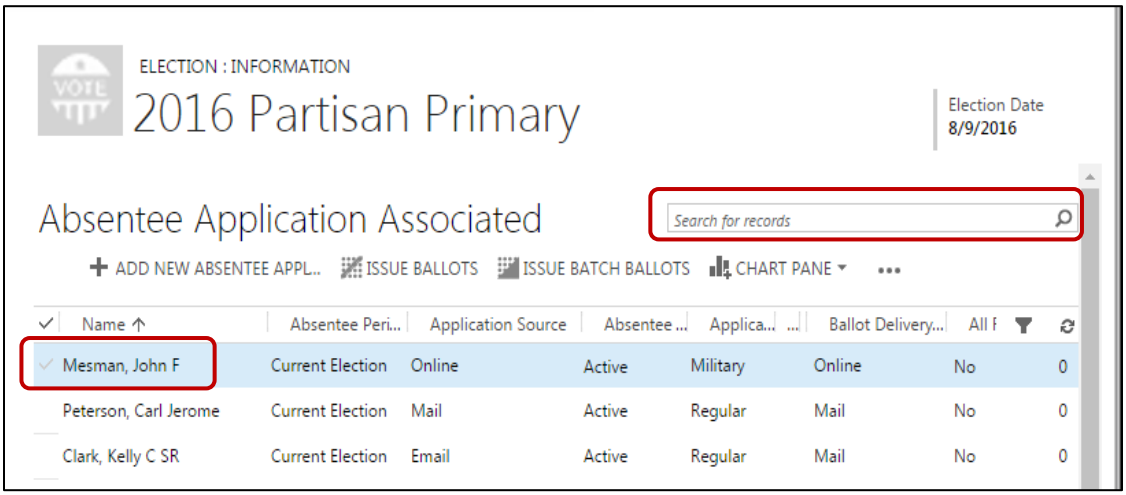
5. To search for a canceled or inactive absentee application, change the view to "My Inactive Absentee Applications"



Search for Absentee Applications for a Specific Election

1. Click the Elections tile
2. Click the Name of the Election
3. In the top navigation bar, click the drop-down arrow to the right of the name of the election
4. Click the Absentee Applications tile in the top navigation bar

5. The "Absentee Application Associated" view will open. All active absentee application requests for the specific election will display in the grid.
6. To search for an absentee application, enter the first and last name of the voter in the search bar
7. Click the name of the voter in the view grid to open the absentee record



3.4 Manage Absentee Applications

In WisVote, absentee applications are canceled by deactivating the absentee application record. The system will automatically deactivate an absentee application if the corresponding voter record is deactivated. Absentee applications can be manually deactivated if the voter's indefinitely confined absentee status or address changes.

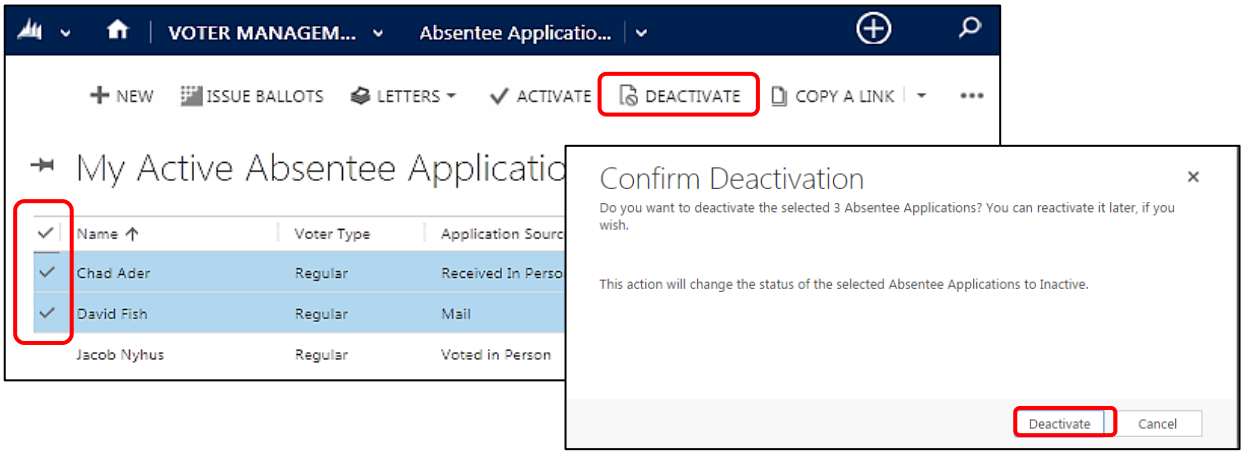
Five Steps to Managing an Absentee Voter Record

1. Add the absentee application in WisVote
2. Issue an absentee ballot, print the mailing labels and update the ballot sent date
3. Record the ballot as returned (or not returned)
4. Record a vote cast by an absentee voter on the poll book
5. Post-election: cancel unreturned ballots; adjust indefinitely confined absentee applications

Cancel an Absentee Application

1. Click the Absentee Applications tile
2. The page will default to My Active Absentee Applications view; search for, or locate the absentee application records to cancel in the grid
3. Select the absentee applications you want to deactivate by clicking the records in the far left check box column
4. Click the Deactivate button at the top of the Absentee View page
5. Click the Deactivate button in the Confirm Deactivation window to complete the deactivation

> ***Note:*** *The Deactivate button will appear when a record is selected.*



6. Once deactivated, the record will be moved from the My Active Absentee Applications views to the My Inactive Absentee Applications view

3.5 Issue Absentee Ballots

When absentee ballots are issued in WisVote, the Ballot Sent Date field is updated and an absentee watermark is created next to the elector's name on the poll book. Absentee ballot mailing labels are generated, printed and affixed to the absentee envelopes. When absentee ballots are returned through the mail or in-person, they are recorded in WisVote as returned and the Ballot Return Date field is updated.

Two mailing labels are generated for each absentee ballot that is issued. Both of the mailing labels will display the date of the election, county, municipality, ward and the voter's name. The first label has the absentee mailing address and is placed on the mailing envelope; the second label has the residential address and is placed on the return absentee certificate envelope.

Absentee ballot mailing labels can be generated individually or as a batch. Municipalities with a large number of absentee application requests can choose to generate mailing labels in one or multiple batches. During the in-person absentee period, mailing labels can be generated in daily batches, or individually on a small label printer.

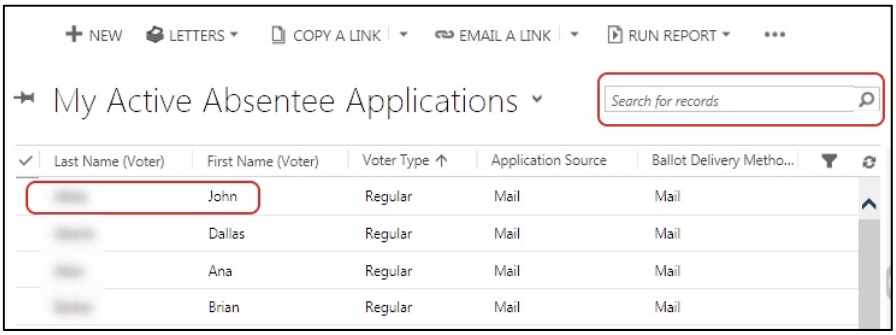
Important Notes

- The Contest Complete Checkpoint and the Candidate Complete Checkpoints must be selected before absentee ballots can be issued in WisVote
- All absentee ballots tracked in WisVote are viewable on the MyVote Wisconsin website

Issue Absentee Ballots from the Absentee Applications Tile

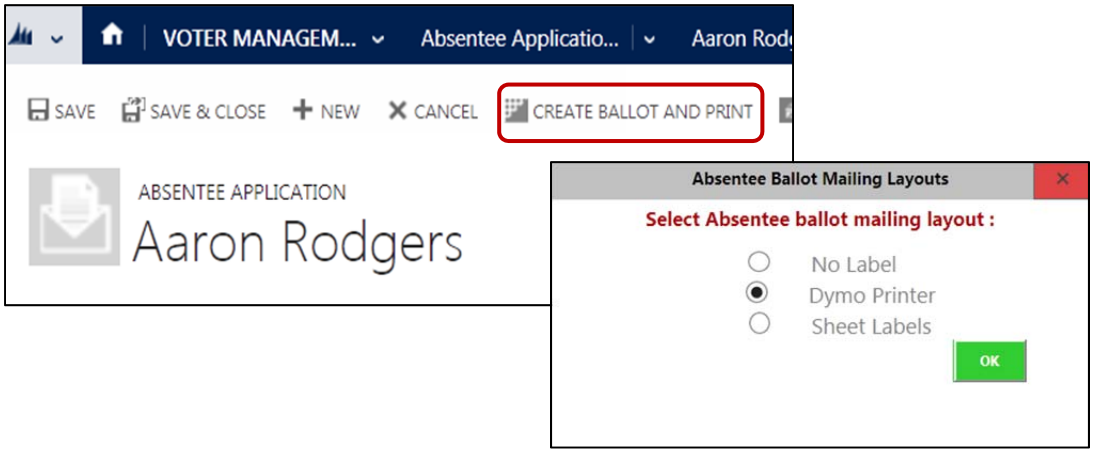
When adding an absentee application, an individual ballot may be issued and mailing labels printed simultaneously when the application is approved and saved in WisVote. If an absentee application is added and saved in WisVote, but a ballot is not issued, a ballot may be issued and mailing labels printed at a different time.

1. Click the Absentee Applications tile
2. The "My Active Applications" view will display all active applications for both current and future elections; to search for an active absentee application, enter the name of the voter in the search field, then press enter
3. Click the name of the voter in the search results grid to open and review the active absentee application record



4. Click the Create Ballot and Print button at the top of the absentee application form to issue an absentee ballot with or without a label

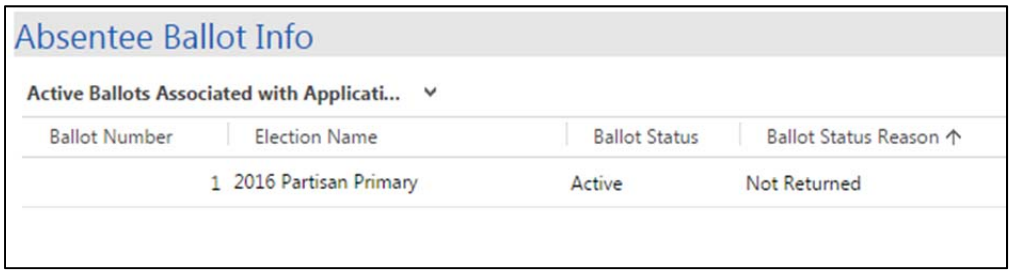
5. Select the Dymo Printer or Sheet Labels in the Absentee Ballot Mailing window to print mailing labels; select the No Label option to track the absentee ballot information only, click OK



6. Two mailing labels are generated for each absentee voter. Both of the mailing labels will display the date of the election, county, municipality, ward, voter's name, absentee application type and care facility name (if applicable). The first label has the absentee mailing address and is placed on the mailing envelope; the second label has the residential address and is placed on the return absentee certificate envelope.

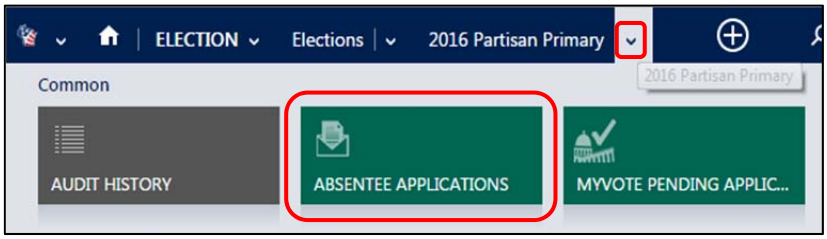
7. To review the absentee ballot information, open the voters Absentee Application record

8. The absentee ballot information will be displayed below the Absentee Ballot Info tab

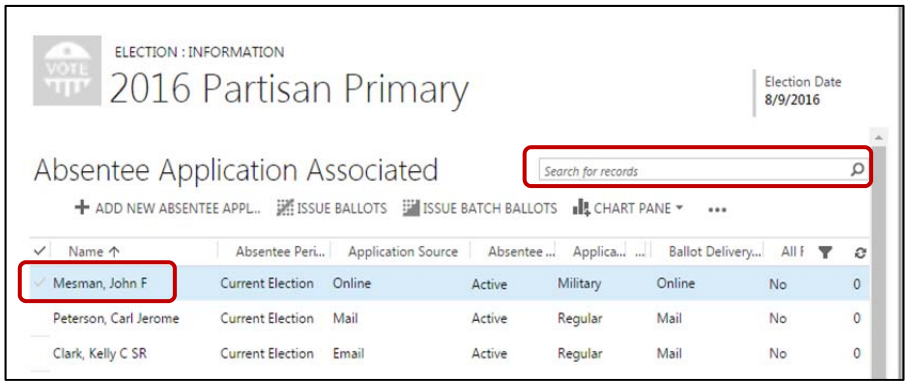


Issue Absentee Ballots within an Election

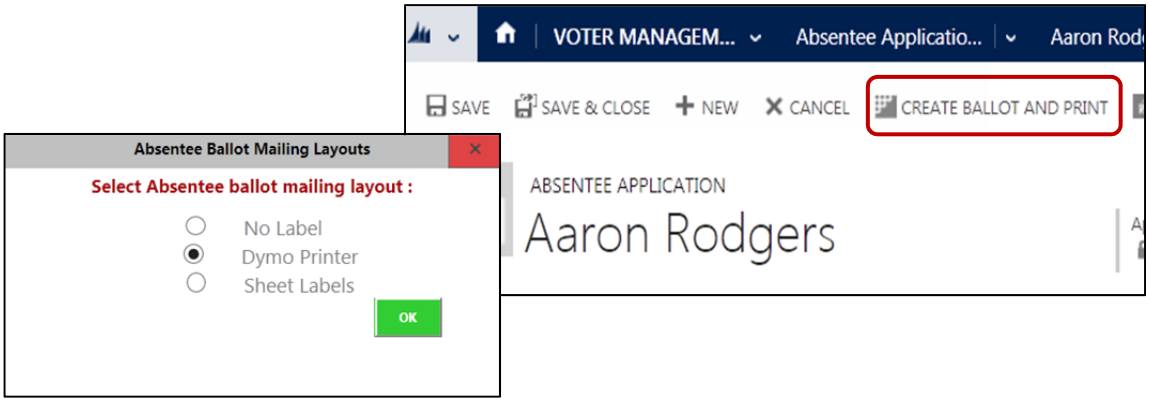
1. Click the Elections tile
2. Click the name of the election
3. In the top navigation menu, click the drop-down arrow to the right of the name of the election
4. Click the Absentee Applications tile in the top navigation bar



5. The "Absentee Application Associated" view will open; all active absentee application requests for the specific election will display in the grid
6. To search for an absentee application, enter the first and last name of the voter in the search bar
7. Click the name of the voter in the view grid to open the absentee record



8. Click the Create Ballot and Print button to issue an absentee ballot for the absentee application
9. Select the Dymo Printer or Sheet Labels in the Absentee Ballot Mailing window to print mailing labels; select the No Label option to track the absentee ballot information only, click OK



10. Two mailing labels are generated for each absentee voter. Both of the mailing labels will display the date of the election, county, municipality, ward, voter's name, absentee application type and care facility name (if applicable). The first label has the absentee mailing address and is placed on the mailing envelope; the second label has the residential address and is placed on the return absentee certificate envelope.

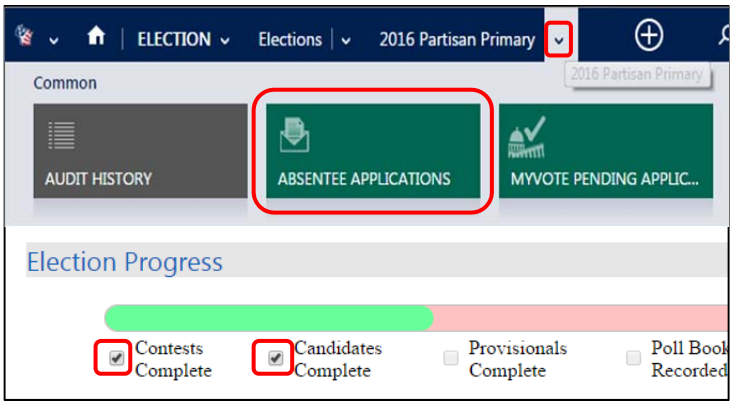
11. To review the absentee ballot information, return to the voters Absentee Application record

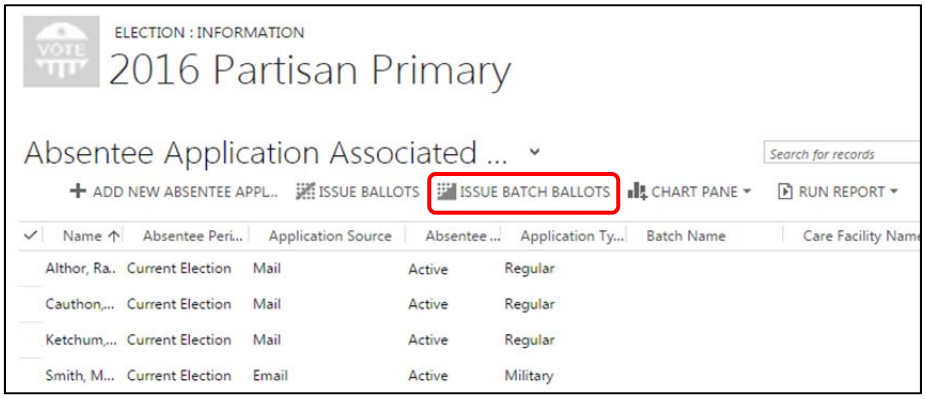
Issue Absentee Ballots as a Batch

Note: creating a batch will not cause previously issued ballots to be reissued!

Step 1: Create the Batch

1. Click the Elections tile
2. Click the name of the election
3. Verify the Contests Complete and Candidates Complete Checkpoints are checked
4. In the top navigation menu, click the drop-down arrow to the right of the name of the election
5. Click the Absentee Applications tile in the top navigation bar
6. Click the Issue Batch Ballots button in the absentee application view page

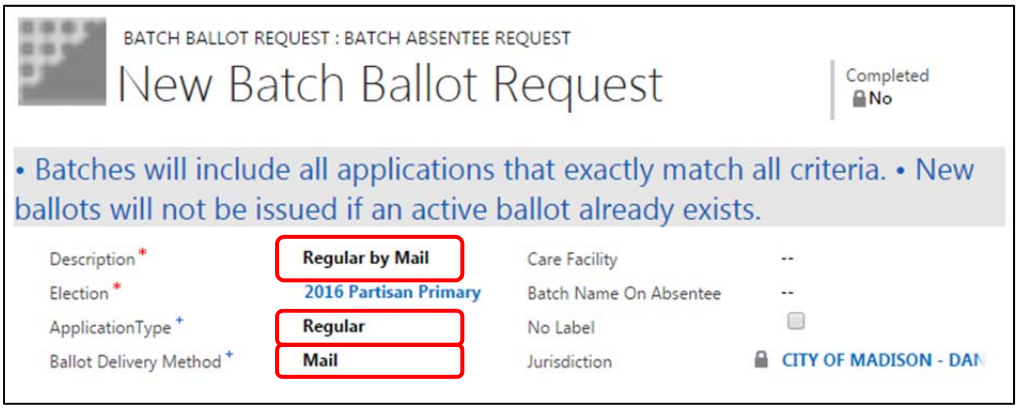




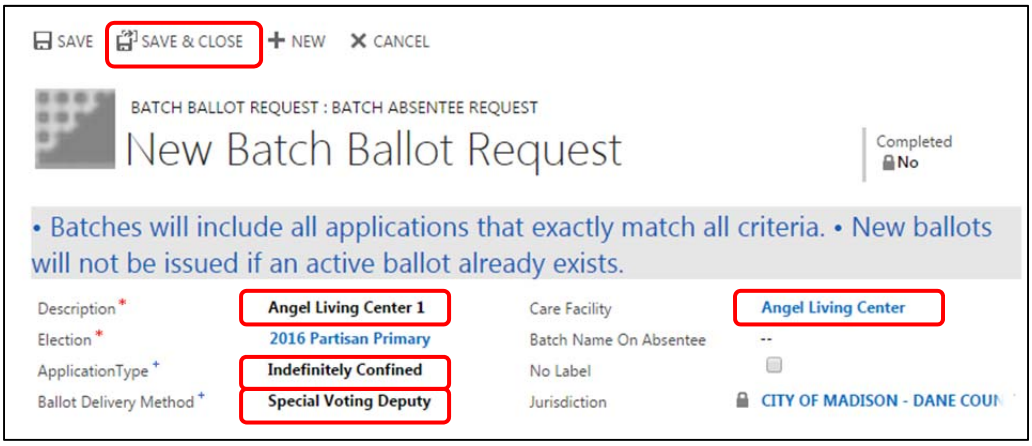
7. In the New Batch Absentee Request window, enter a description for the batch, verify that the correct election is selected
8. Select the absentee application type and ballot delivery method for the batch
9. If applicable, enter the name of the care facility into the Care Facility field and select the name of the care facility in the drop-down list of search results
10. To finish creating the batch request, click Save and Close

Batch Examples:

A. In the screenshot below, an absentee ballot batch is being created for all of the outstanding regular voter absentee application requests that have a ballot delivery method of by mail.



B. In the screenshot below, an absentee ballot batch is being created for all of the outstanding indefinitely confined absentee application requests that have a ballot delivery method of special voting deputy, at the selected care facility.

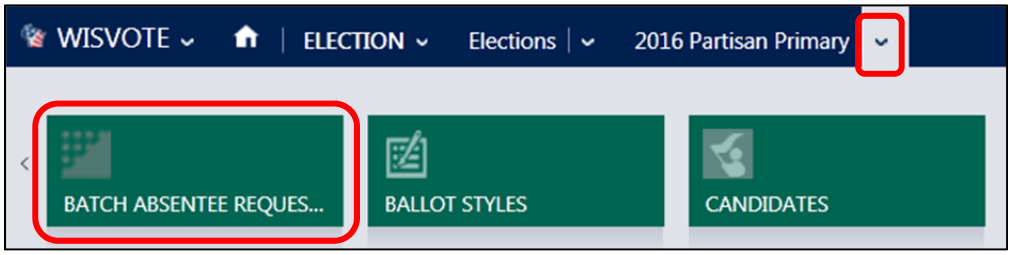


Important note about entering names into the Batch Name on Absentee field:

- If the Batch Name on Absentee ballot field is left blank, all of the outstanding absentee applications that match the voter type, delivery method and care facility (if applicable) will be included in the batch.
- If a batch name is entered in the Batch Name on Absentee ballot field, ONLY the absentee applications that have the exact same batch name on their absentee application will be included in the batch.

Step 2: Generate the Batch

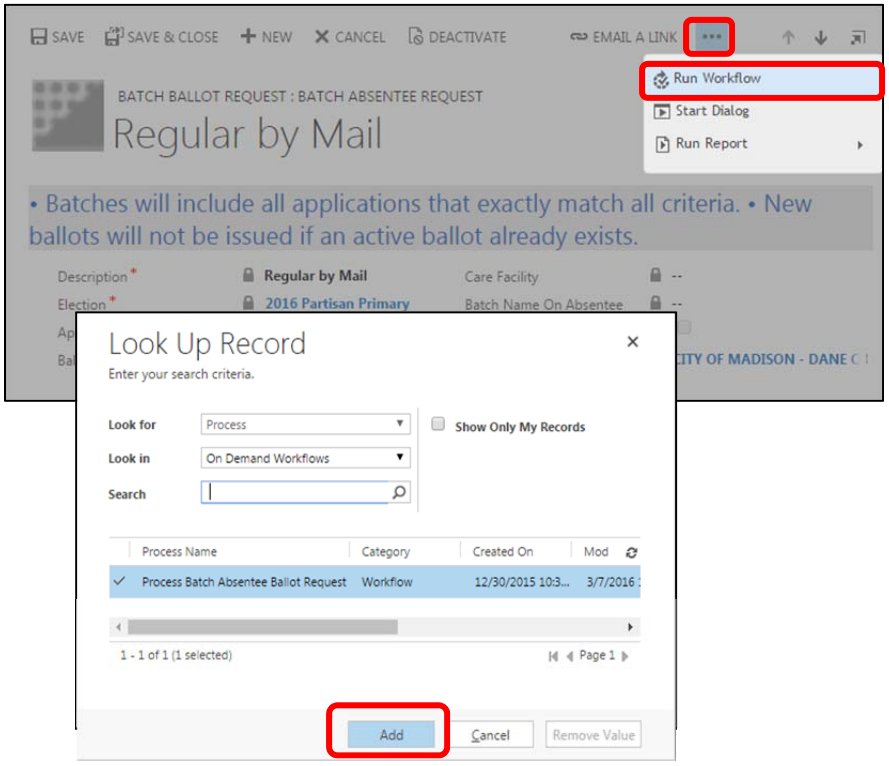
11. Click the drop-down arrow to the right of the name of the election to display the navigation bar
12. Click the Batch Absentee Request tile in the navigation bar to open the Batch Absentee Request view page



13. Click the name of the batch in the Batch Absentee Request Associated view grid, to open the Batch Absentee Request page

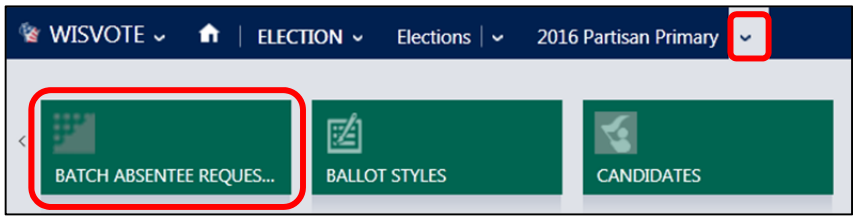
14. Click the ellipses at the top of the Batch Absentee Request page to display additional actions, select "Run Workflow"
15. Click Add in the Look Up Record window
16. Click OK in the confirmation window to generate the batch absentee application request

    Note: it may take up to 15 minutes to complete the workflow

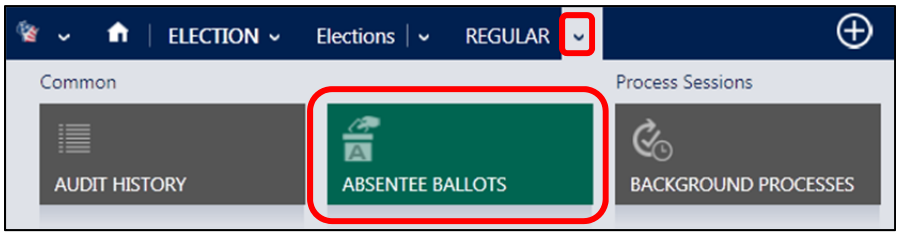


Step 3: Print the Batch Absentee Mailing Labels

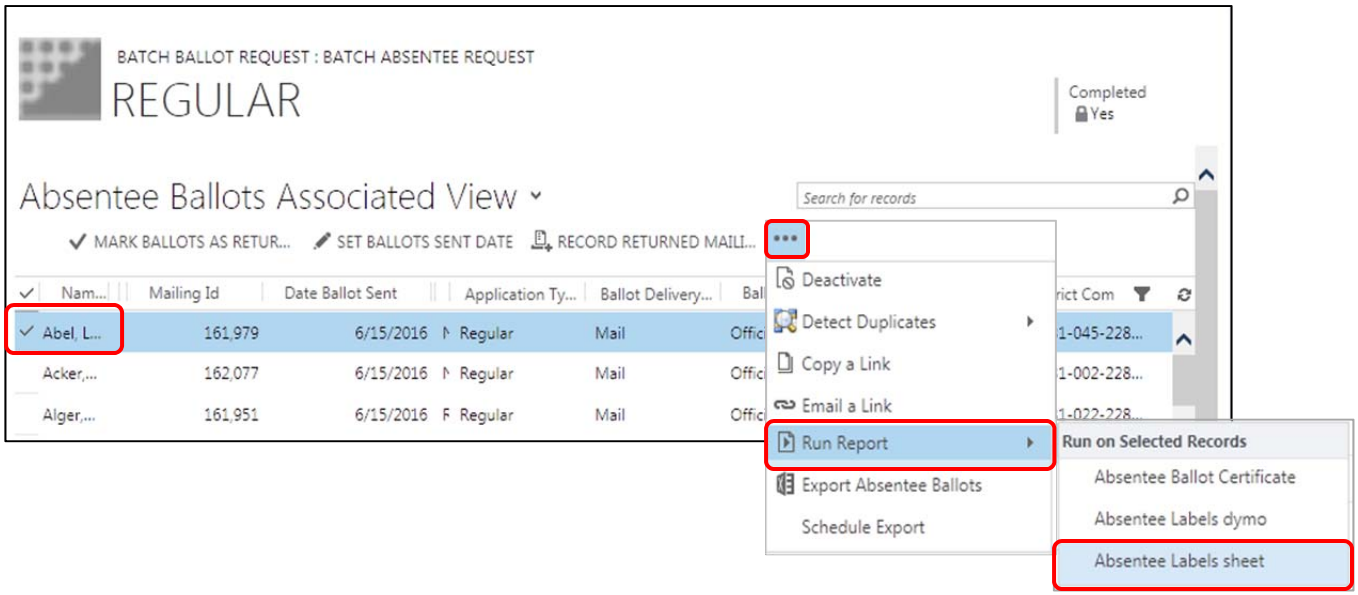
17. Click the drop-down arrow to the right of the name of the election to display the navigation bar
18. Click the Batch Absentee Request tile in the navigation bar to open the Batch Absentee Request view page



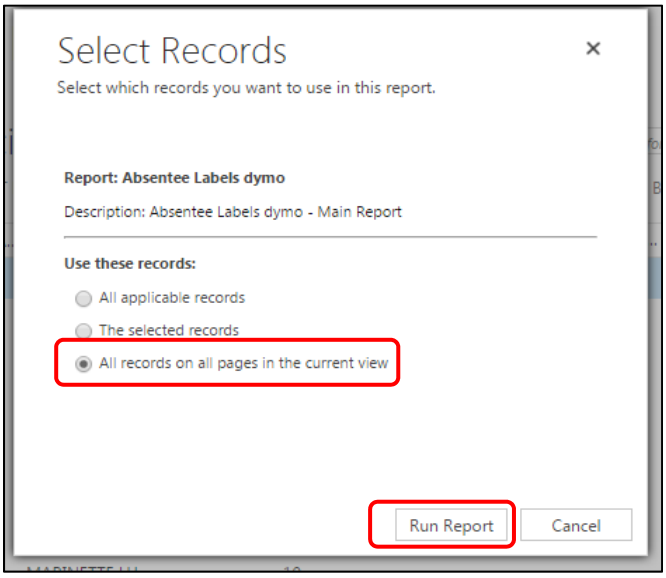
19. Click the name of the batch in the Batch Absentee Request Associated view grid, to open the Batch Absentee Request page
20. To print the absentee mailing labels for the batch, click the drop-down arrow to the right of the batch request name to display the navigation bar, then click the Absentee Ballots tile



21. On the Absentee Ballots Associated View page, select at least one record
22. Click the ellipses to display additional actions, then select Run Report to open a drop-down list of printing options
23. Select one of the label options in the drop-down list

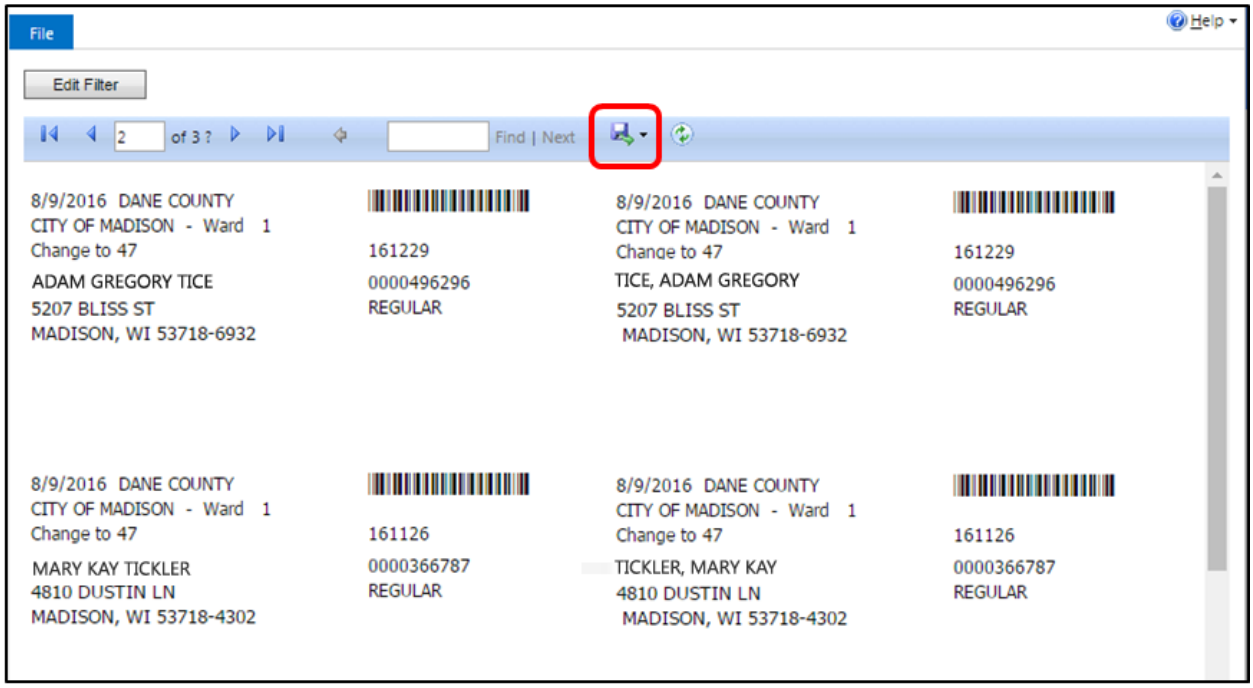


24. In the Select Records window, select option three, "All records on all pages in the current view", then click Run Report to generate the labels for the applications in the batch



25. A report viewer window will open and a display a "Report is Being Generated" message

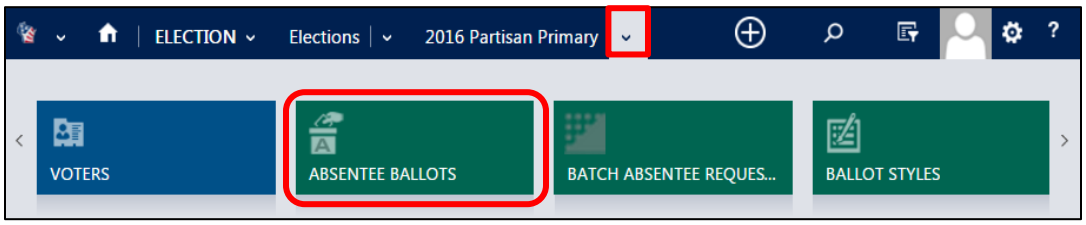
26. After the labels have been generated, click the Save and Export button to save and export the mailing labels



3.6 Manage Absentee Ballots

Search for an Active or Canceled Absentee Ballot within an Election

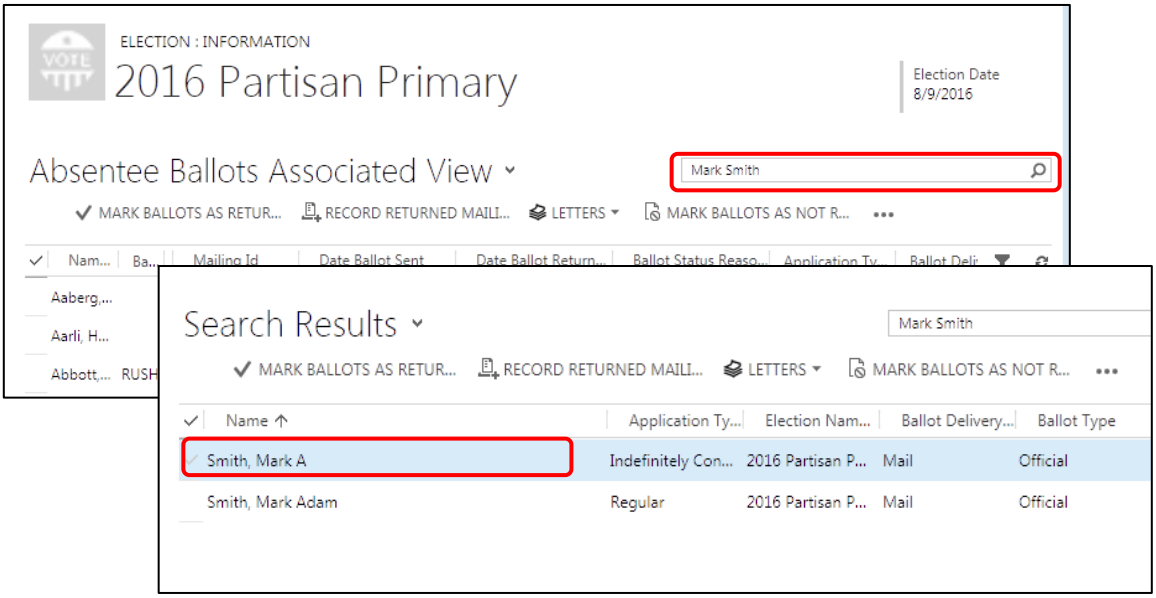
1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. On the top navigation menu, click the drop-down arrow to the right of the name of the election
4. Click the Absentee Ballots tile in the top navigation bar to open the Absentee Ballots view page



5. The page will default to the Absentee Ballots Associated view; to search for an absentee ballot record, enter the name of the voter in the search box

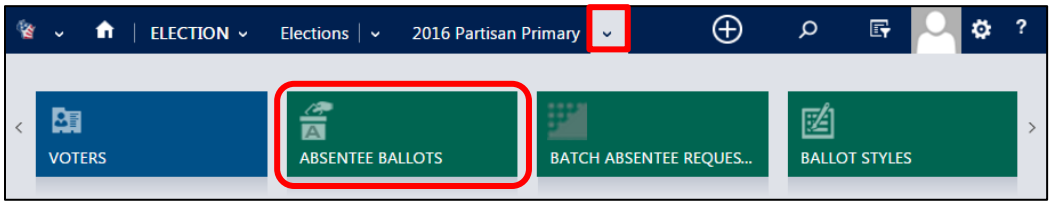
   You can search for the voter by first and last name, the order of the names does not matter. Example: searching for Mark Smith or Smith Mark will produce the same search results. The search results will display both active and canceled absentee ballot records.

6. Click the name of the voter in the search results grid to open the Absentee Ballot Record

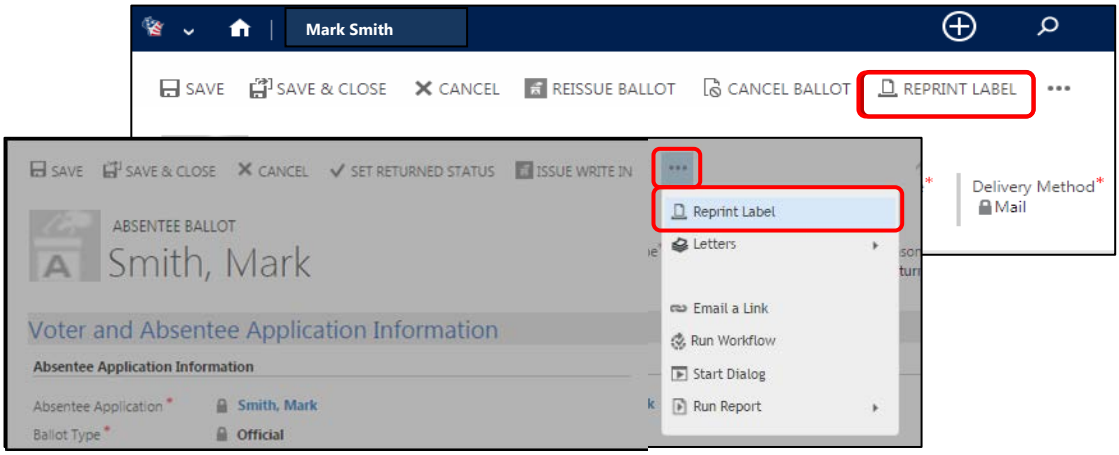


Reprint an Absentee Ballot Mailing Label

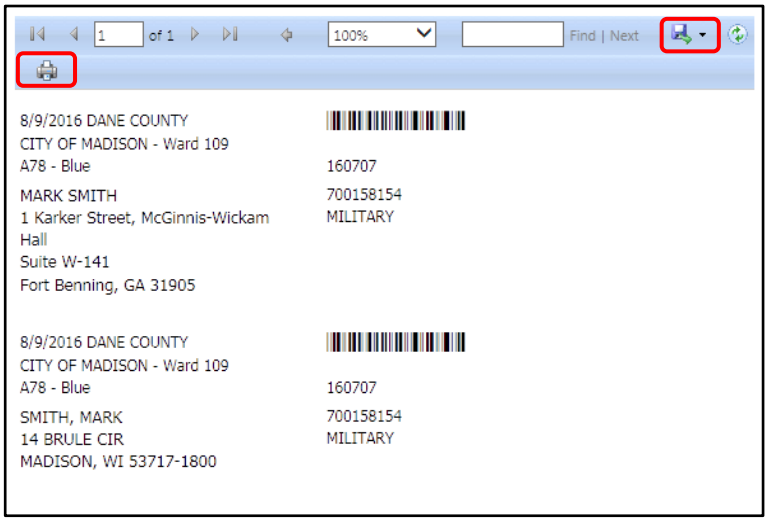
1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. On the top navigation menu, click the drop-down arrow to the right of the name of the election
4. Click the Absentee Ballots tile in the top navigation bar to open the Absentee Ballots view page



5. Search for the name of the voter in the Absentee Ballots Associated View grid; click the voter name to open the absentee ballot record
6. Click the Reprint Label button at the top of the page; if the button does not displaying click the ellipses to view more actions

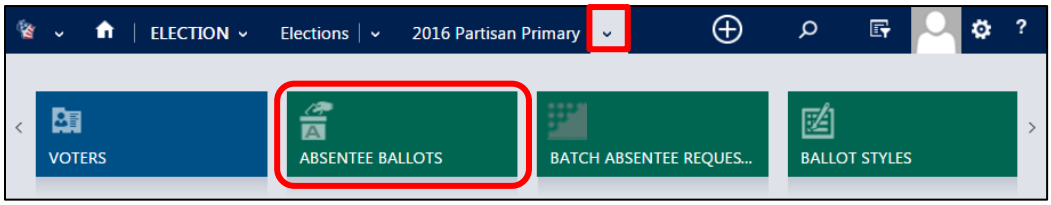


7. Select one of the label options, click OK
8. The the mailing label will generate and display in generate report window; click the Save & Export to save the labels or the Print button to print the mailing labels directly from WisVote



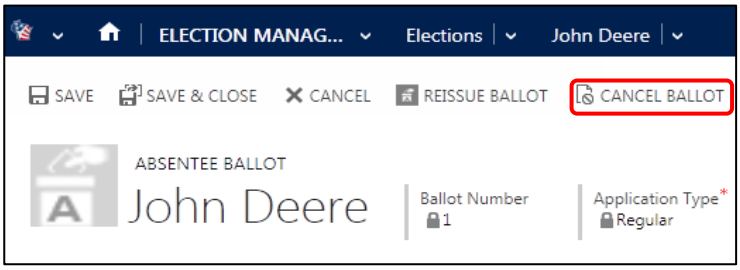
Cancel an Absentee Ballot

1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. On the top navigation menu, click the drop-down arrow to the right of the name of the election
4. Click the Absentee Ballots tile in the top navigation bar to open the Absentee Ballots view page

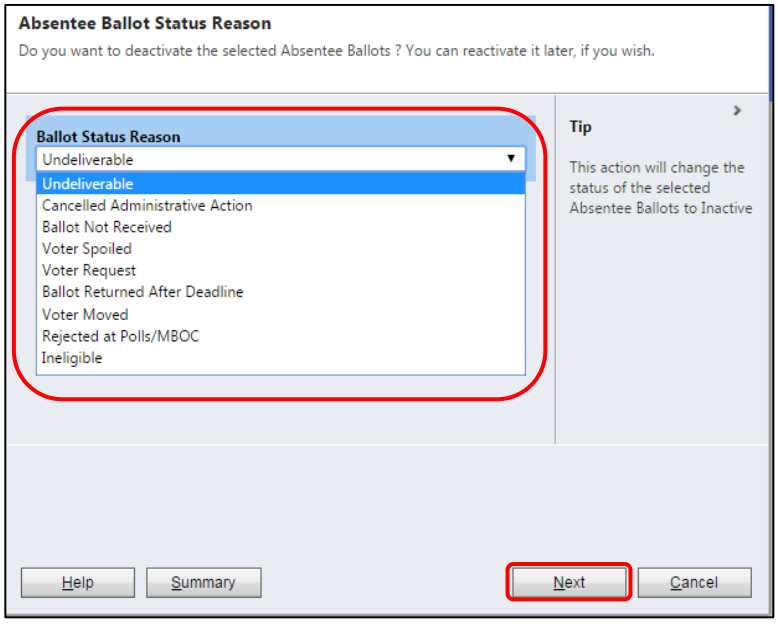


5. Search for the name of the voter in the Absentee Ballots Associated View grid; click the voter name to open the absentee ballot record
6. Click the Cancel Ballot button at the top of the absentee ballot record to launch the Absentee Ballot Status window

   If the button does not display, click the ellipses to view more actions



7. Select the cancellation reason, click Next
8. Click Finish to close the window cancel the absentee ballot



Reissue an Absentee Ballot

> ***Note:*** *An absentee ballot must be canceled in WisVote prior to reissuing the ballot!*

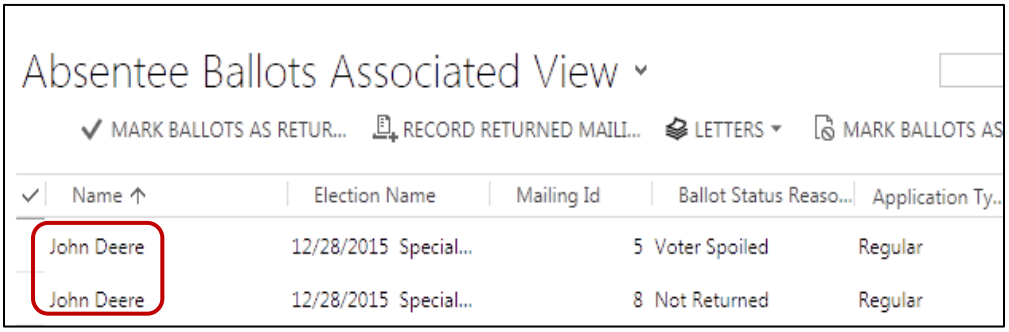
1. Follow steps 1 through 8 above to cancel the voters absentee ballot

2. Search for the name of the voter in the Absentee Ballots Associated View grid; click the voter name to open the absentee ballot record

   Click the Reissue Ballot button at the top of the voters absentee ballot record to launch the Reissue Ballot window; if the button does not display, click the ellipses to view more actions

3. Click Finish to close the window and reissue the absentee ballot

4. Two absentee ballot records for the voter will be displayed in the Absentee Ballots Associated View grid; one record for the canceled ballot and a second for the reissued, active ballot



3.7 Record Returned Absentee Ballots

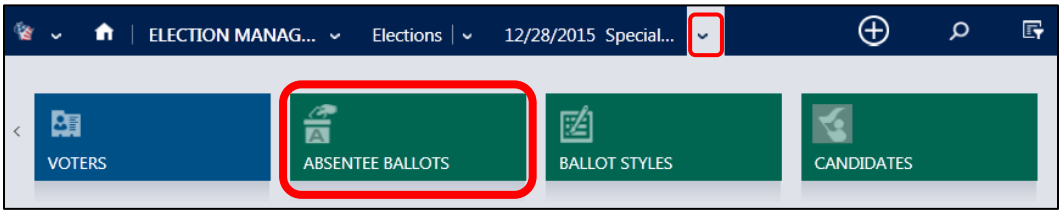
Absentee Ballots may be marked as returned either manually or by scanning the returned mailings barcode. Absentee ballot records in WisVote will have a default ballot status reason of not returned until the absentee ballot record is updated. Returned absentee ballots can be recorded in WisVote up to 20 days after the election. After 20 days, the absentee ballot record will be automatically recorded as not returned.

Ballot Status Reasons

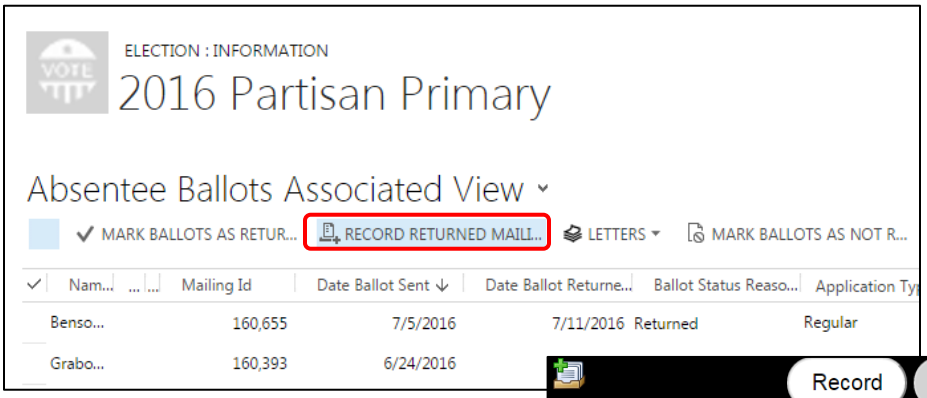
- **Returned**
  Voted absentee ballots returned by the deadline.
- **Not Returned**
  Absentee ballots not returned.
- **Undeliverable**
  Post office was unable to deliver the absentee ballot to the address on the mailing label. The absentee ballot record will be automatically canceled when this reason is selected.
- **Ballot Returned after Deadline**
  Voted absentee ballots returned after the deadline.
- **Returned, to be Rejected**
  Voted absentee ballots returned by the deadline by marked to be rejected by the clerk or election official.
- **Voter Refused**
  Unvoted absentee ballots returned by the deadline but marked as refused by the voter or special voting deputy. The absentee ballot record will be automatically canceled when this reason is selected.

Record Returned Absentee Ballots by Scan

1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. On the top navigation menu, click the drop-down arrow to the right of the name of the election
4. Click the Absentee Ballots tile in the top navigation bar to open the Absentee Ballots view page



5. The page will default to the "Absentee Ballots Associated" view; click the Record Returned Mailings button to open the Record Returned Ballots window

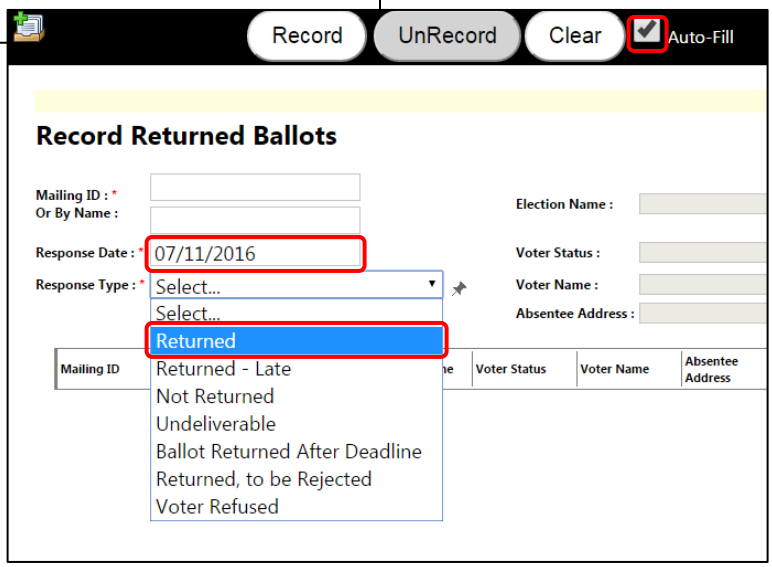


6. The Auto-Fill checkbox will be automatically selected

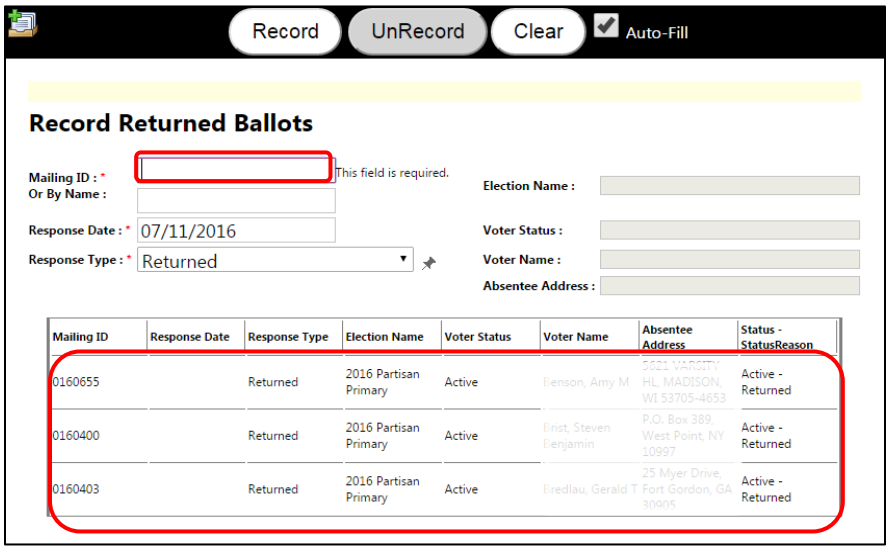
7. Select the date the absentee ballot was received in the Response Date field

8. Select a Response Type from the drop-down list; the response type selected will be recorded as the response type for all ballots scanned in the session;, to record a different response type, select the response type and continue to scan returned absentee ballots

9. Place the curser in the Mailing ID field and scan all of the returned absentee ballots with the selected response type



10. The recorded absentee ballot records will display below the data fields in the Record Returned Ballots window to indicate the record has been updated



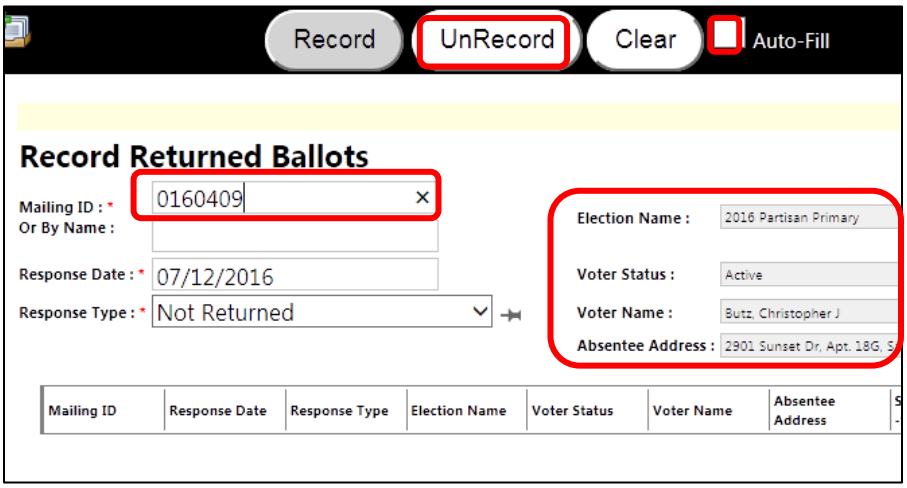
Note: If you uncheck the Auto-Fill checkbox, the ballot will not automatically be recorded as returned when you scan the Mailing ID. To record the ballot with Auto-Fill off, click the Record button. The absentee ballot record will then display below the data fields.

11. Close the Record Returned Ballots window to finish recording the returned absentee ballot records and return to the Absentee Ballots Assocaited View page

12. To review the updated absentee ballot records, refresh the page and return to the Absentee Ballots Associated view; the Ballot Status Reason and Date Ballot Returned fields will be updated

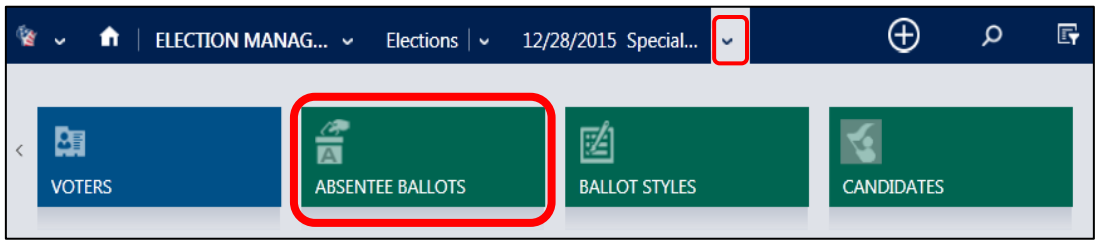
Unrecord Returned Absentee Ballots by Scan

1. Click the Record Returned Mailings button on the Absentee Ballots Associated view page to open the Record Returned Ballots window
2. Unselect the Auto-Fill checkbox
3. Place the curser in the Mailing ID field and scan the mailing ID; the voter's information will display in the information fields
4. Click the Unrecord button at the top of the Record Returned Ballots window; the absentee ballot record will display below the data fields to indicate the record has been updated
5. Close the Record Returned Ballots window to finish unrecording returned absentee ballots



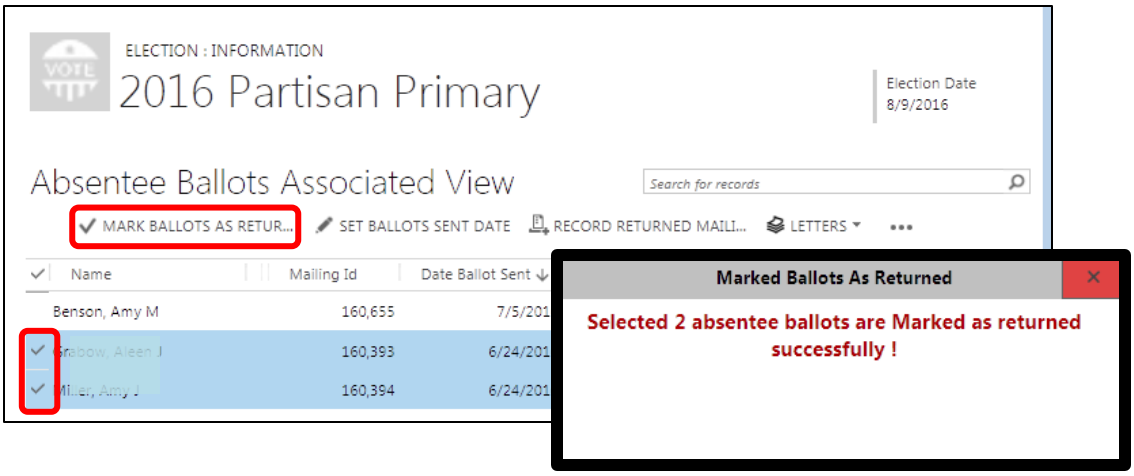
Manually Record Returned Absentee Ballots

1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. On the top navigation menu, click the drop-down arrow to the right of the name of the election
4. Click the Absentee Ballots tile in the navigation bar to open the Absentee Ballots view page



5. Click the checkbox on the far left column of the absentee ballot record(s) to select the absentee ballots to mark as returned; click the Mark Ballots as Returned button

6. A confirmation window will appear confirming the number of ballot that have been marked as returned



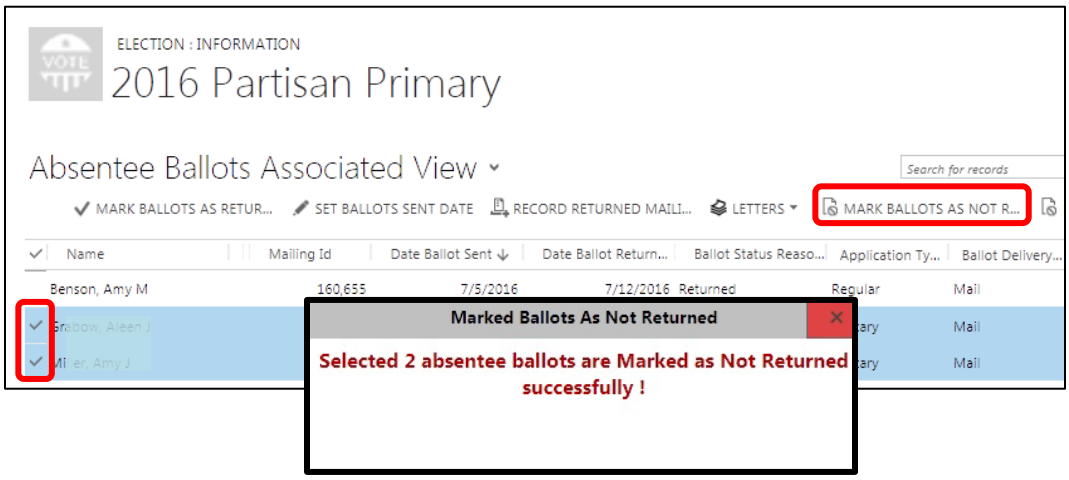
7. To review the updated absentee ballot records, refresh the page and return to the Absentee Ballots Associated view; the Ballot Status Reason and Date Ballot Returned fields will be updated

Manually Record Unreturned Ballots

1. In the Absentee Ballots Associated View page, select the absentee ballot record to be recorded as not returned by selecting the checkbox in the far left column of each record

2. Click the checkbox on the far left column of the absentee ballot record(s) to select the absentee ballots to mark as unreturned; click the Mark Ballots as Not Returned button

3. A confirmation window will appear confirming the number of ballot that have been marked as not returned



8. To review the updated absentee ballot records, refresh the page and return to the Absentee Ballots Associated view; the Ballot Status Reason field will be updated

3.8 Care Facilities

Special Voting Deputies (SVD) are required to serve a residential care facility if there are at least five registered electors of the municipality who are occupants of the facility and if there is at least one absentee ballot application from an occupant of the facility.

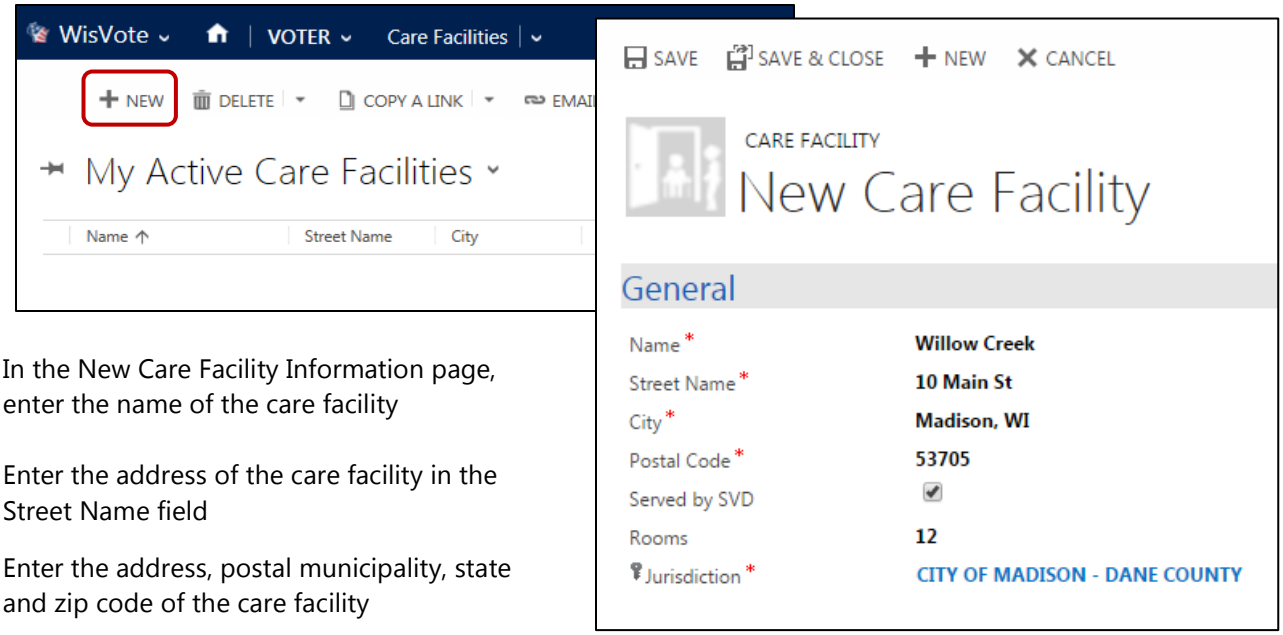
Retirement homes may be served by SVDs if the municipal clerk determines that a significant number of the occupants lack adequate transportation to the appropriate polling place, need assistance in voting, are age 60 or over, or are declared as indefinitely confined electors. Once the clerk has made this determination, the facility will be designated as a qualified retirement home which will require SVD service for all elections until the clerk makes a contrary formal determination as to the facility's eligibility for future SVD service.

In WisVote, only one care facility record should be assigned to an address unless the address has different unit numbers. Contact the G.A.B. Help Desk to setup a care facility record outside of your jurisdiction

---

Create a Care Facility Record

1. Click the Care Facilities tile
2. The Care Facility View page will open and display the default, "My Active Care Facilities" view
3. Click the +New button to add a care facility record



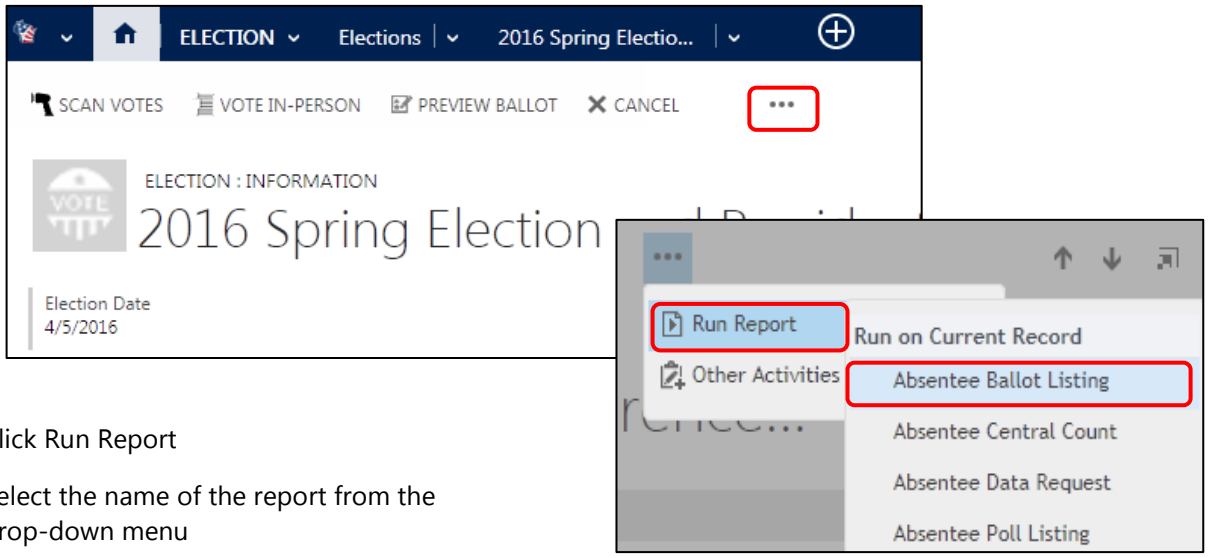
4. In the New Care Facility Information page, enter the name of the care facility
5. Enter the address of the care facility in the Street Name field
6. Enter the address, postal municipality, state and zip code of the care facility
7. If the care facility is served by Special Voting Deputies, select the Served by SVD checkbox
8. In the Rooms field, enter the number of available rooms (optional)
9. Click Save, to save the new care facility record and review the information or Save & Close to save the new care facility record and return to the Care Facility View page

3.9 Run an Absentee Report

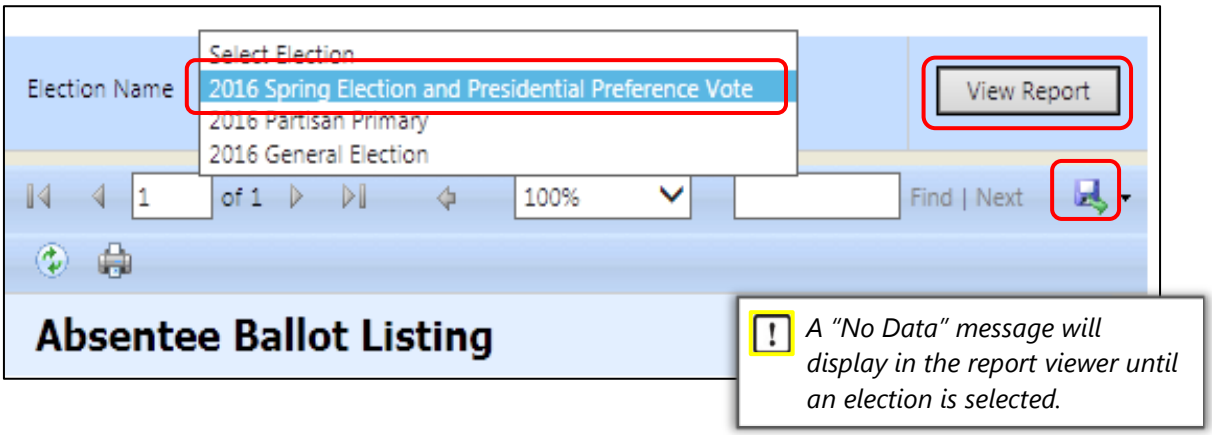
Follow the steps below to run an Absentee Ballot Listing, Absentee Central Count, Absentee Data Request, or Absentee Poll List report.

Run an Absentee Report

1. Click the Elections tile
2. Click the name of the election
3. Click the ellipses (...) at the top of the Election Information page



4. Click Run Report
5. Select the name of the report from the drop-down menu
6. Click the Election Name field at the top of the report viewer and select the election
7. Click View Report to generate the report
8. The report will display in the Report Viewer, click the save & export button to save the report



4.1 Polling Places

Accurate polling place data is required to assign voters to the correct voting location. WisVote allows a user to easily update, add and deactivate polling place location records. A polling place location record must be added before it can be assigned to an election plan. Contact the Elections Helpdesk to setup a polling place record outside of your jurisdiction.

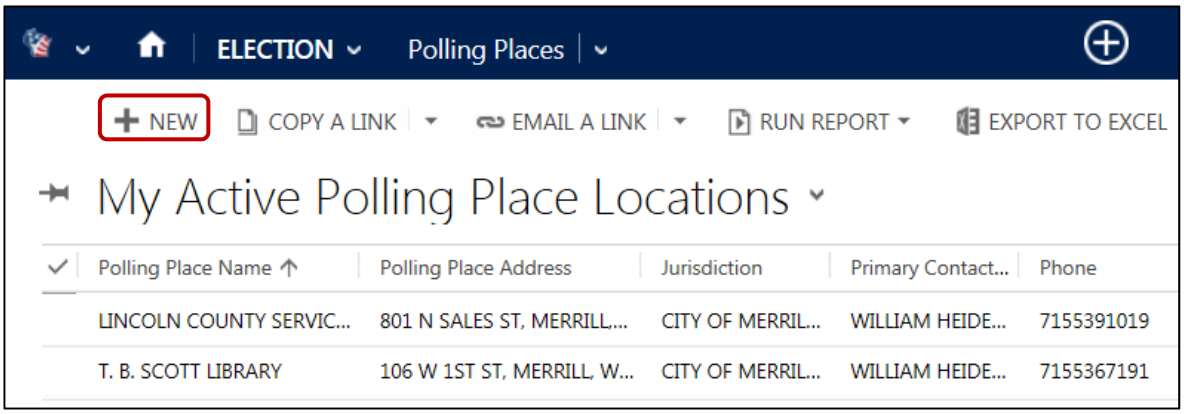
Important Information

- Only one polling place record should be assigned to an address unless the polling place has multiple rooms that are used for voting
- Election Plans can be adjusted to accommodate different polling place assignments for different elections or election types
- Accurate polling place and voting room information in WisVote minimizes voter confusion and increases the quality of information voters find while using the MyVote Wisconsin website and other public search tools

Create a Polling Place Record

County-level users and Providers will have to change their active jurisdiction to the municipality where the polling place is located

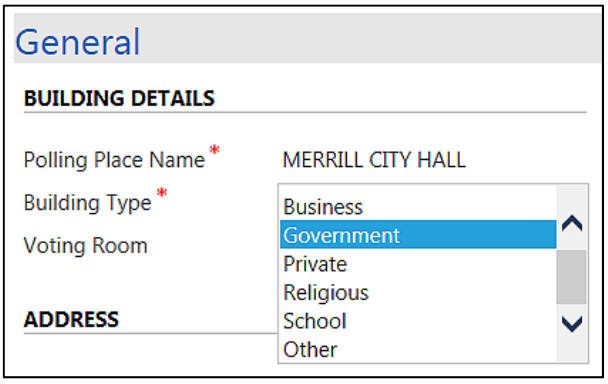
1. Click the Polling Places tile
2. The Polling Place Location View page will open and display the *My Active Polling Place Locations* view
3. Click the *+New* button to add a polling place location



4. In the Polling Place Location Information page, enter the Polling Place Name

- A descriptor should be added to generic location names such as Village Hall or Police Station; this descriptor can be the name of the municipality where the facility is located (Freedom Town Hall, Milwaukee Fire Station 2)
- Ward numbers should not be added to polling place names; users will assign a polling place to a ward, or multiple wards in the Election Plan

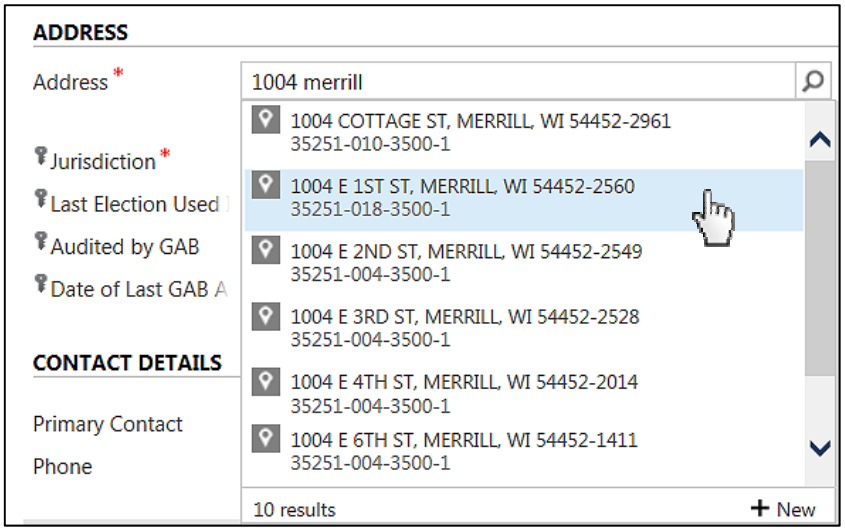
5. Select the Building Type from the drop-down list



6. Enter the Voting Room (if required); a specific room name (Room 302) or a descriptor (Lower Level) can be entered to help voters locate their Polling Place
   - If voting is conducted in multiple rooms at the same polling place location, separate polling place records are required for each room used for voting

     Example: a municipality uses the School Library for Spring Elections and the School Gymnasium for Fall Elections; two School polling place records are required
   - If a polling place location is used by two different municipalities and each municipality votes in a different room, two polling place records are required for the polling place location
7. Enter the address of the polling place, then press Enter or click the magnifying class to display the search results

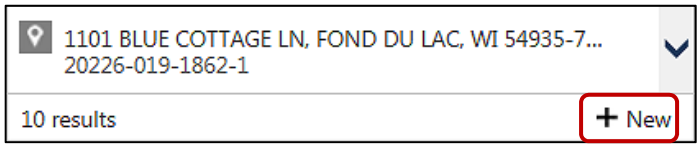
   Note: generally, enter the street number and name only or add the municipality if necessary; for most street types, entering the full street type will not produce any results, exclude or abbreviate the street type; if the street is a single digit omit the street and add the municipality
8. Select the address from the drop-down list of address search results



9. If the address is not found in the drop-down list of search results,

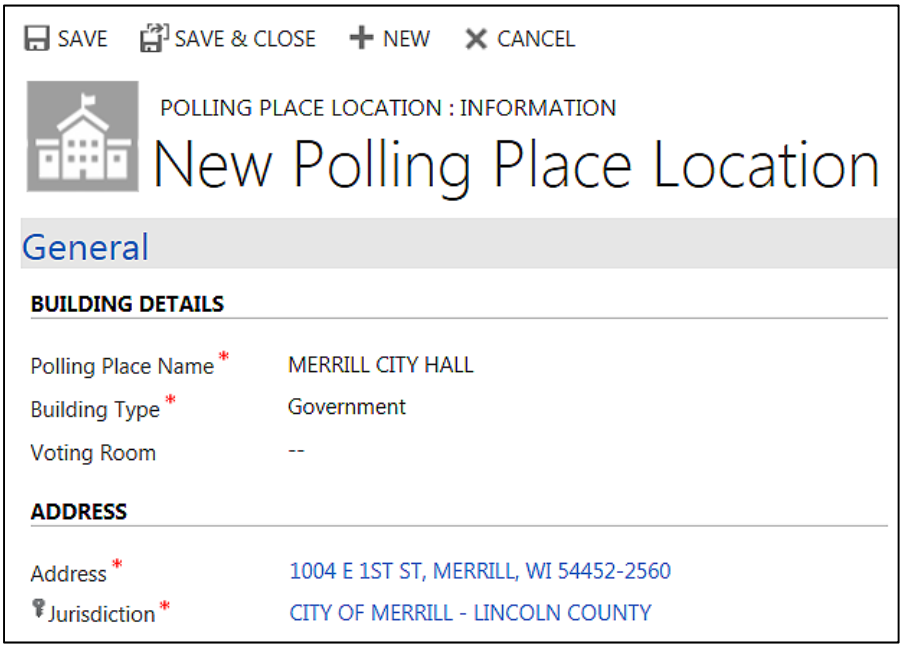
   Before adding a new address, go to the Addresses tile and search for the address in the *My Addresses* view. The address may be inactive because it is not associated to a registered voter or does not have a district combination (see 7.2 Address, Address Already Exists)

   The address can be added from the Addresses view or to add a new address click the *+New* button



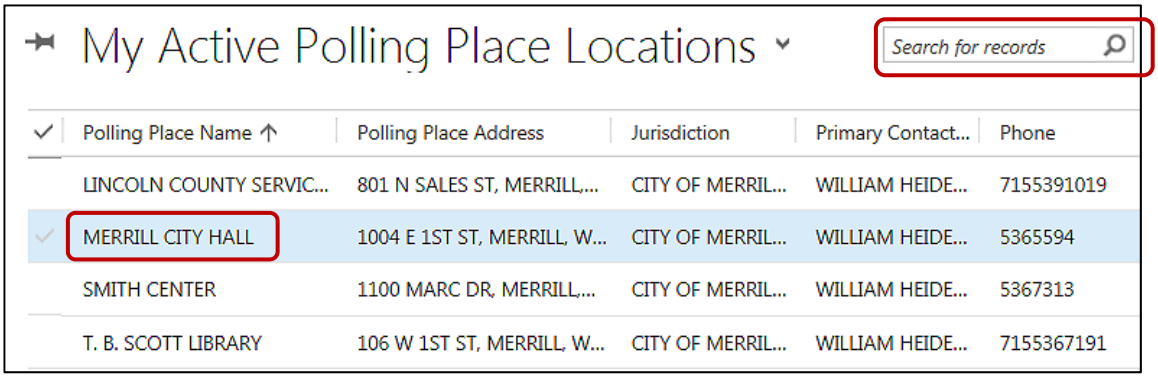
10. Review the Jurisdiction field to confirm it is correct

11. Click Save to add the new polling place location and review the record, or Save & Close to add the new polling place location and return to the Polling Place Locations View page
    Note: the polling place record will now appear in the *My Active Polling Place Locations* grid



Review and Update an Existing Polling Place Record

1. Click the Polling Places tile
2. The Polling Place Location View page will open and display the *My Active Polling Place Locations* view
3. Click the name of the Polling Place in the *My Active Polling Place Locations* grid to open the Polling Place Location Information page
4. To search for the polling place, enter the name of the Polling Place in the search box, then click the name of the polling place in the Search Results grid to open the Polling Place Location Information page



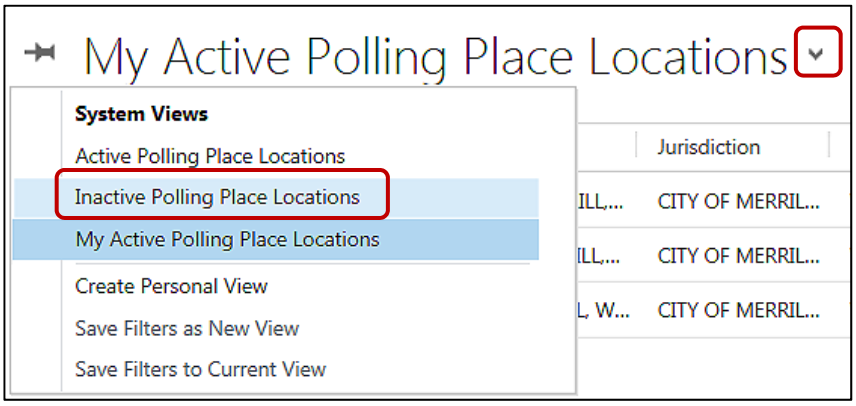
5. Review and/or update the polling place information, then click Save to save and review the updated information or Save & Close to save and return to the *My Active Polling Place Locations* view page

Deactivate a Polling Place Record

1. Click the Polling Places tile
2. The *My Active Polling Place Locations* view will display all active polling places in the jurisdiction
3. Click the name of the Polling Place in the *My Active Polling Place Locations* grid to open the Polling Place Location Information page (see image above)

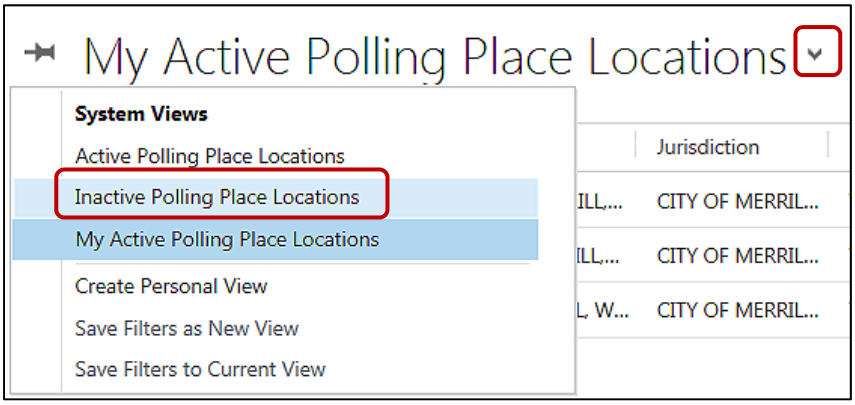
   Click the Deactivate button at the top of the Polling Place Location Information page to change the status of the polling place location to inactive
   Note: Best practices are to activate and deactivate from the Polling Place Location Information page

4. The Status will change to Inactive, click the Cancel button to return to the *My Active Polling Place Locations* view page
   Note: the polling place record will now appear in the Inactive Polling Place Locations grid

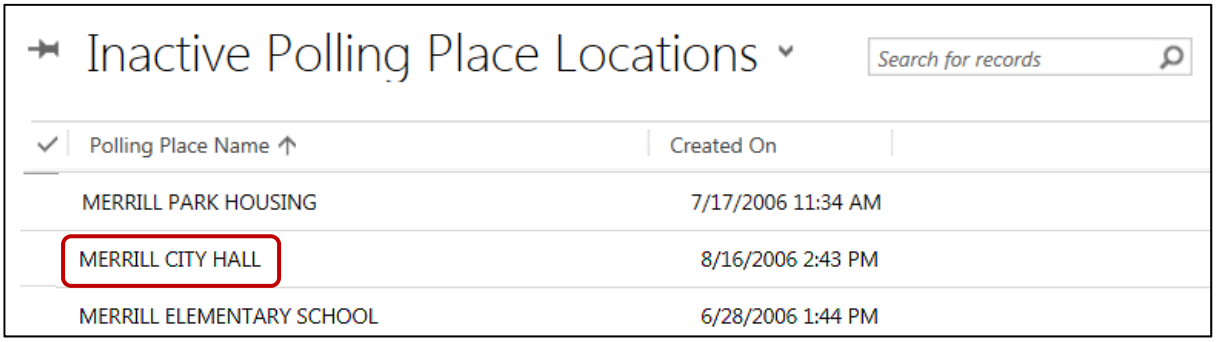


Activate an Inactive Polling Place Location

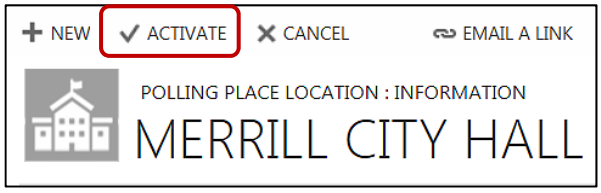
1. Click the Polling Places tile
2. Click the drop-down arrow to change the view to, "Inactive Polling Place Locations" to display all inactive polling places



3. Click the name of the Polling Place in the Inactive Polling Place Locations grid to open the Polling Place Location Information page



4. To Search for the Polling Place, enter the name of the Polling Place in the search box, then click the Polling Place Name in the Search Results grid to open the Polling Place Location Information page
5. Click the Activate button at the top of the Polling Place Location Information page
   Note: Best practices are to activate and deactivate from the Polling Place Location Information page



6. Click Save to save and review the polling place information or Save & Close to save and return to the *Inactive Polling Place Location* view page
   Note: the polling place record will now appear in the *My Active Polling Place Locations* grid

Create a Polling Place Record Outside of Your Jurisdiction

- County-level users and Providers will have to change their active jurisdiction to the municipality where the polling place is located
- If a user needs to enter a polling place record at an address that exists outside of their jurisdiction, they will have to contact the Elections Helpdesk for assistance

4.2 Election Plans

An election plan is a reusable template for a specific election type that lists all of the reporting units within a municipality and their assigned polling place locations. The reporting units in a municipality may be single wards or a combination of wards; and may change from election to election. Prior to creating an election plan, all polling place locations should be setup in WisVote.

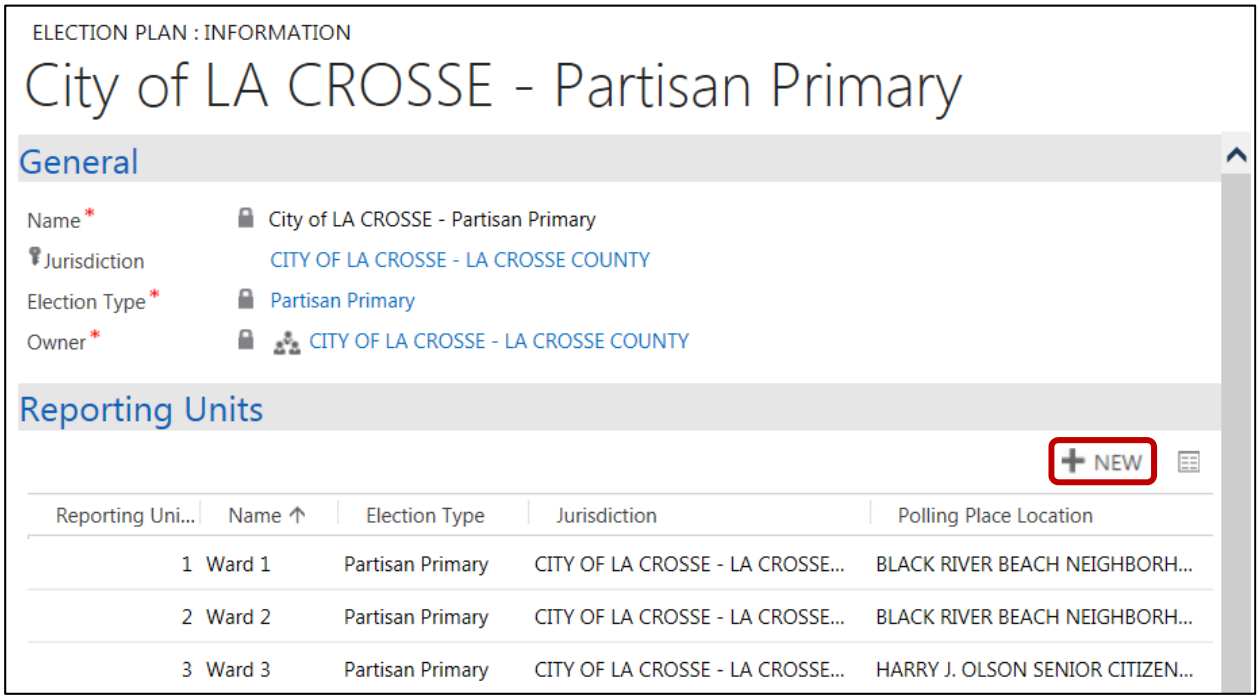
In WisVote, a user cannot add a new election plan or delete an existing one. However, the information in an existing plan can be modified to change polling place and reporting unit assignments. Use the *My Election Plans* view to set up and modify election plans.

Election Plan Setup

An election plan cannot be modified until all elections using this plan have marked the "Election Close" checkpoint.

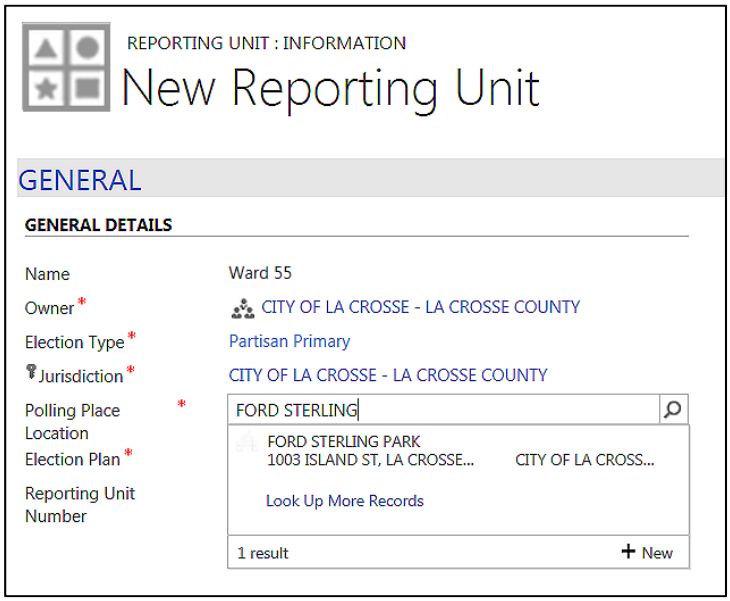
This Plan is used in 2016 Partisan Primary , You cannot modify this plan until listed election's 'Election close' check point is checked.

1. Click the Election Plans tile
2. Click the Election Name to open the Election Plan Information page
3. Click *+New* to open the New Reporting Unit Information page

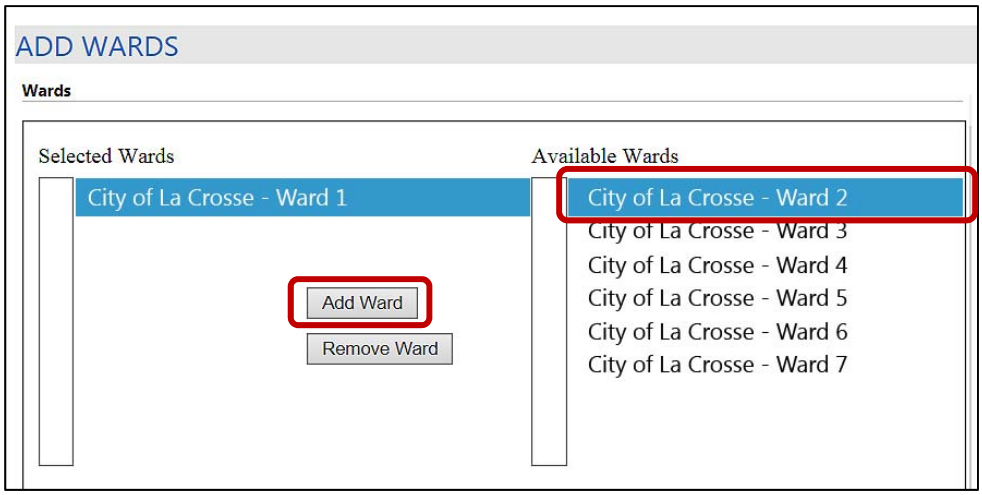


4. Enter the polling place name in the Polling Place Location field; press Enter or click the magnifying glass to search for the polling place

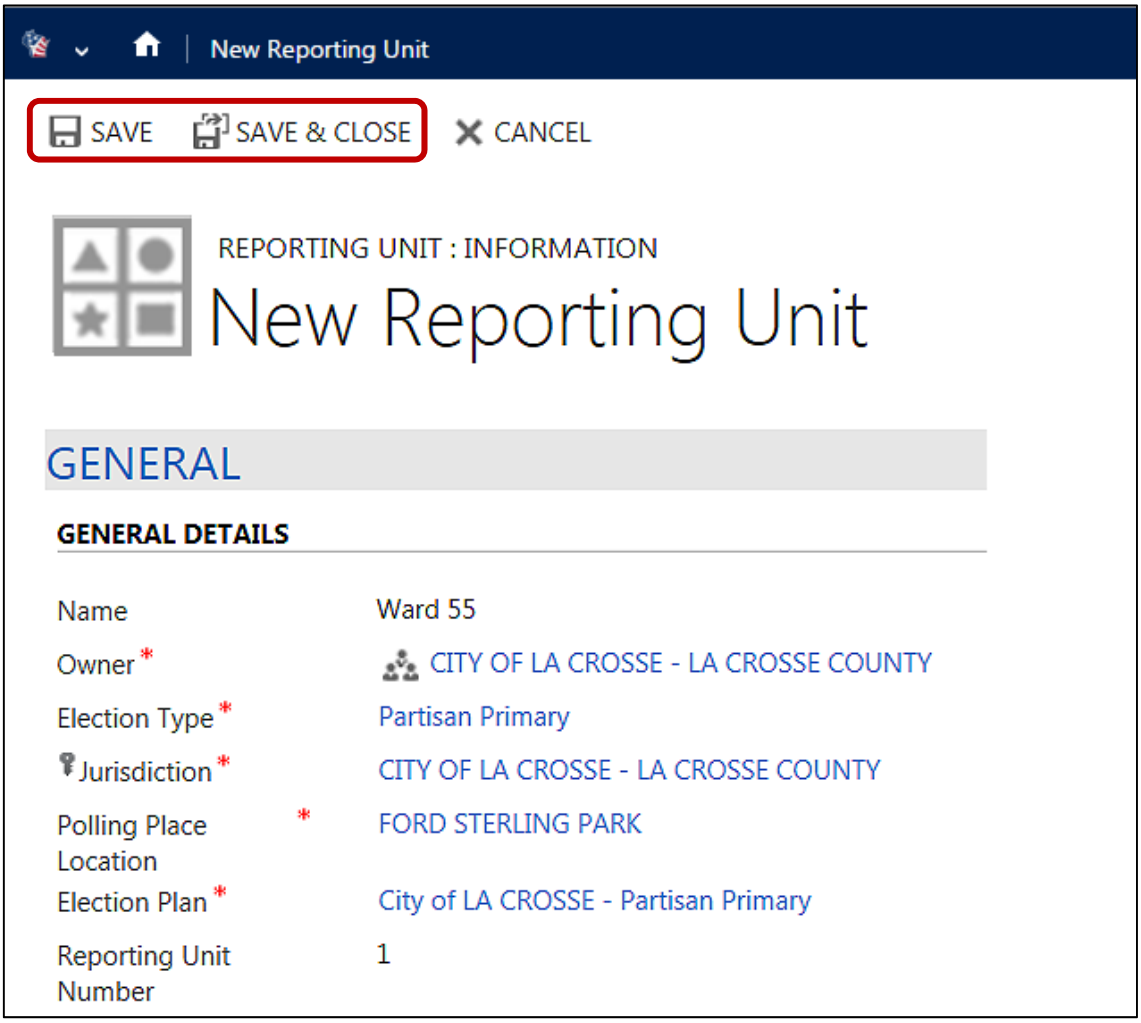
5. To select to polling place, click the polling place name in the drop-down list of results
   Note: the search will display a list of statewide results; verify the polling place is in your jurisdiction



6. To assign a ward to the selected polling place, click the ward name in the *Available Wards* list, then click Add Ward
   Note: multiple wards may be added at the same time



7. Click Save to update and review the Reporting Unit Information window or click Save & Close to save and return to the Election Plan Information page



8. Repeat steps 4 through 7 above, until all of the wards have been assigned to a reporting unit and corresponding polling place

9. Press Save & Close to save the election plan and return to the *Election Plans* view page

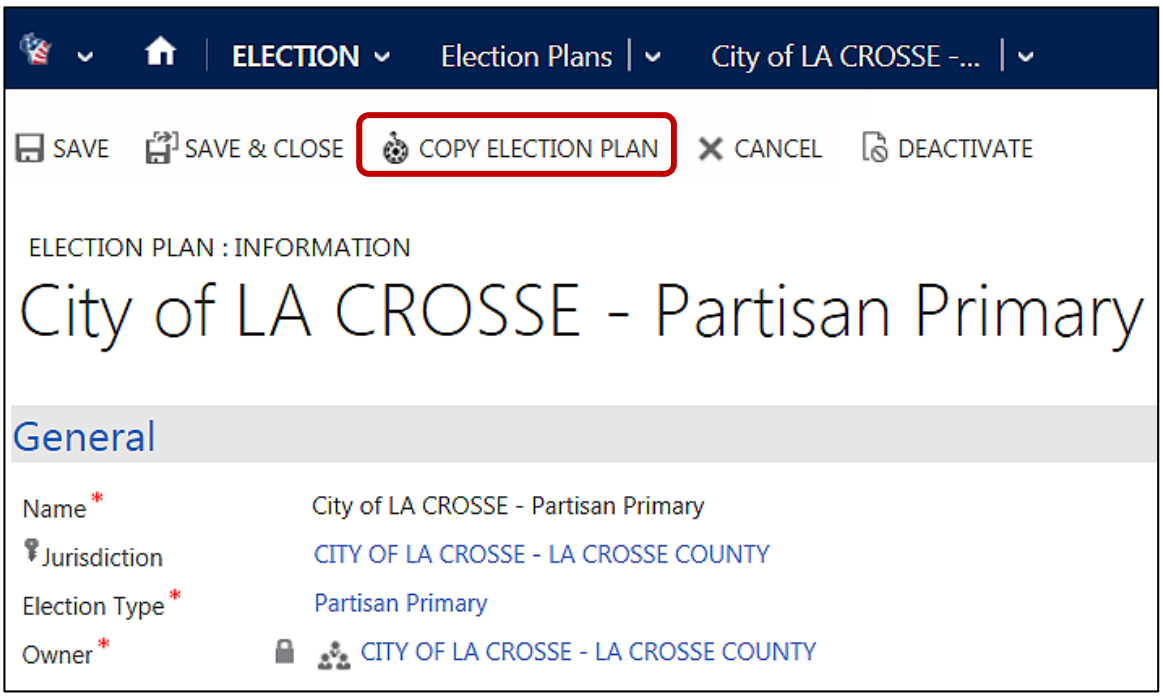
Copy an Election Plan

If the election plan for your jurisdiction will be identical for multiple elections, copying an existing election plan to another election type may be used as an alternative to manually creating the same election plan for multiple election types.

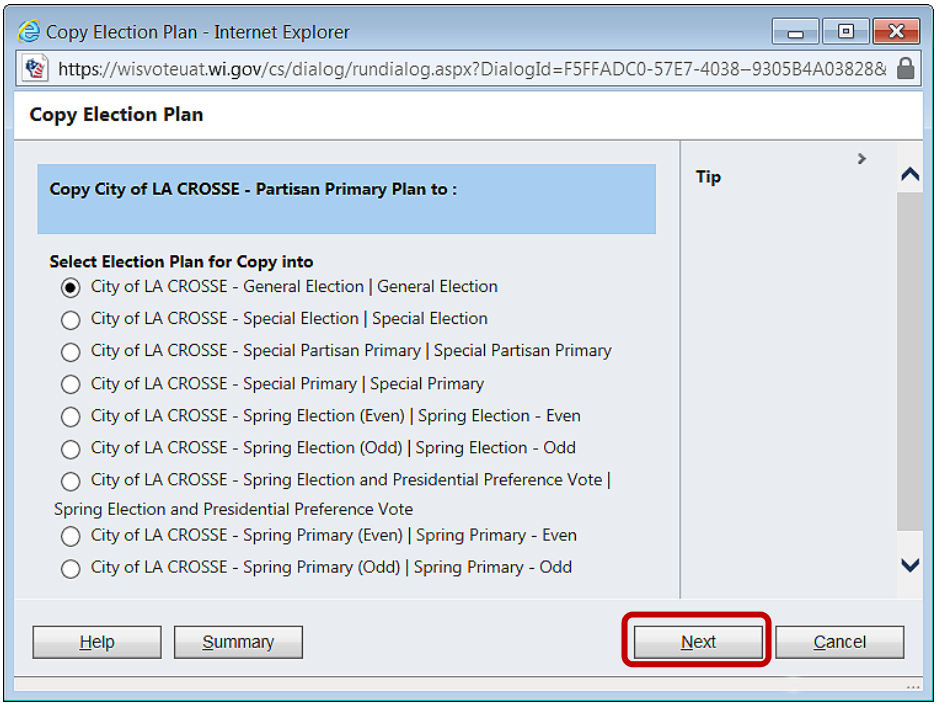
1. Click the Election Plans tile

2. Click the Election Name to open the Election Plan Information page

3. Click the Copy Election Plan button to open the *Copy Election Plan* wizard



4. In the *Copy Election Plan* wizard, select the election you wish to copy the existing election plan into, then click Next
   Note: A complete list of election types will always appear in the *Copy Election Plan* wizard



5. Verify the correct election has been chosen, then click Next

6. Click Finish to copy the existing election plan to the selected election

7. Return to the *My Election Plans* view page to confirm the copy was successful

4.3 Poll Books

Poll books can be retrieved and printed 20 days before the election. Poll books are located in the elections tile and are accessed by opening the election and expanding the poll books tab. A message indicating that the poll books are not available will display in the poll books tab if it is more than 20 days before the election.

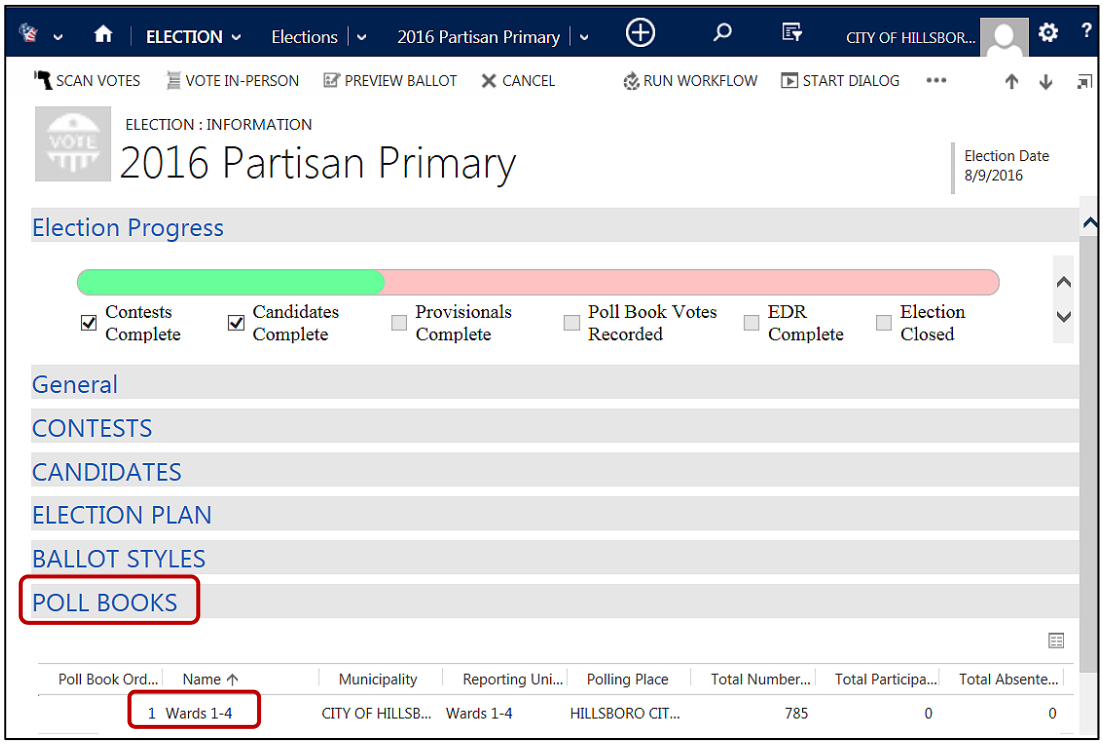
In WisVote, the date the poll book was printed refers to the day the poll book file was generated. It is strongly recommended that the poll book file be saved as a PDF or other document type after it has been generated. If the poll book is saved as a file type, it can be viewed, or printed again without opening WisVote. **Every time the "Print Poll Book" or "Bundle Poll Book" button is selected, the poll book file is regenerated, which may shift or add voters to the poll book file. Always use the most recent poll book file.**

For example, if a poll book is printed 19 days before the election, all the voter registration records entered after the 19 day before the election will appear in the post-supplemental section. If the poll book is reprinted 5 days before the election, all the voters entered between the 18 and 5 day before the election will transfer from the post-supplemental section to the supplemental section of the poll book.

Introduction to Poll Books

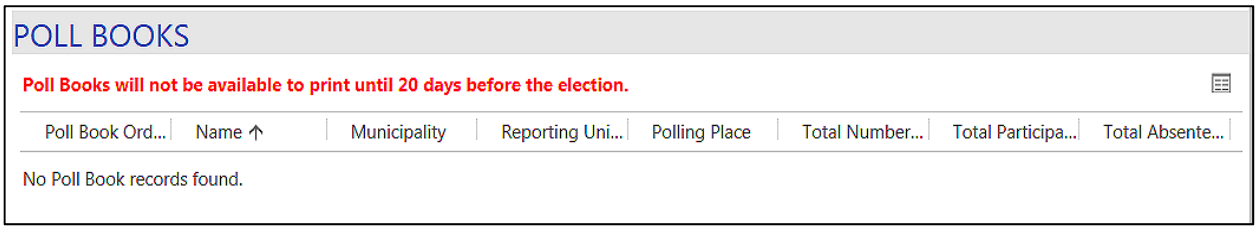
Poll Book Location

1. Click the Elections tile
2. Click the Election Name to open the Election Information page
3. Click the Poll Books tab to expand the view; the poll books will display 20 days prior to the election



No Poll Book Records Found

This is the standard message displayed in the Poll Books tab prior to 20 days before the election.
This is the normal view. The poll books will display in the Poll Books tab 20 days before the election.



Poll Book Information Page

When the poll books are available, clicking the name of the poll book in the poll books tab will open the poll book information page. The poll book information page contains detailed information about the poll book. A single poll book can be printed from this page; it is also the location in the system where voter participation is recorded. The poll book information page has six tabs. To view the data within a tab, click the name of the tab to expand the view.

General	Detailed information and statistics associated with the poll book
Poll Book	Voters with active registrations or register during the regular registration period
Supplemental	Voters who register after regular registration but before the poll books are printed
Post-Supplemental	Voters who register after poll books are printed
EDR	Voters who register on Election Day

Print a Poll Book

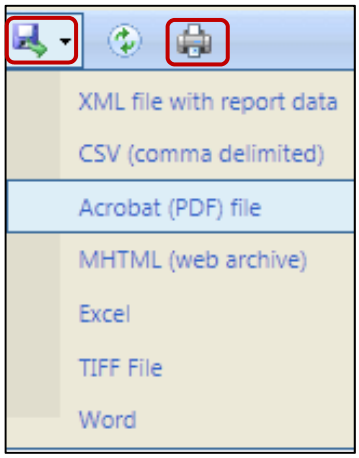
1. To export or print a poll book, click the Elections tile
2. Click the Election Name to open the Election Information page
3. Click the Poll Books tab to expand the view
4. Click the name of the poll book to open the Poll Book Information page

5. Review the general information to confirm all fields are correct

6. Click the Print Poll Book button to generate the poll book; a poll book window will open and display a *Report is Being Generated* message, generating the poll book may take up to 20 minutes

7. When the poll book file is available, click the Save and Export button at the top of the poll book window, and select the Acrobat (PDF) File to export the poll book

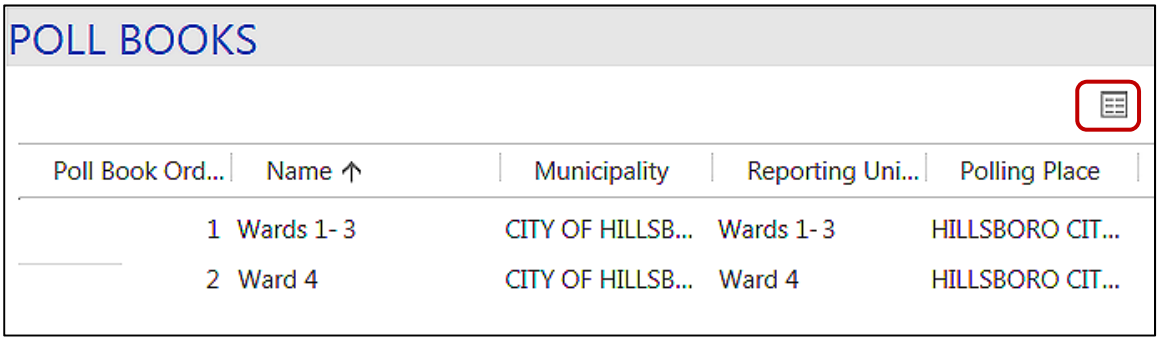
8. To print the poll book directly from WisVote, click the printer symbol at the top of the poll book window



Remember to save the poll book file if printing directly from WisVote!

Print Multiple Poll Books

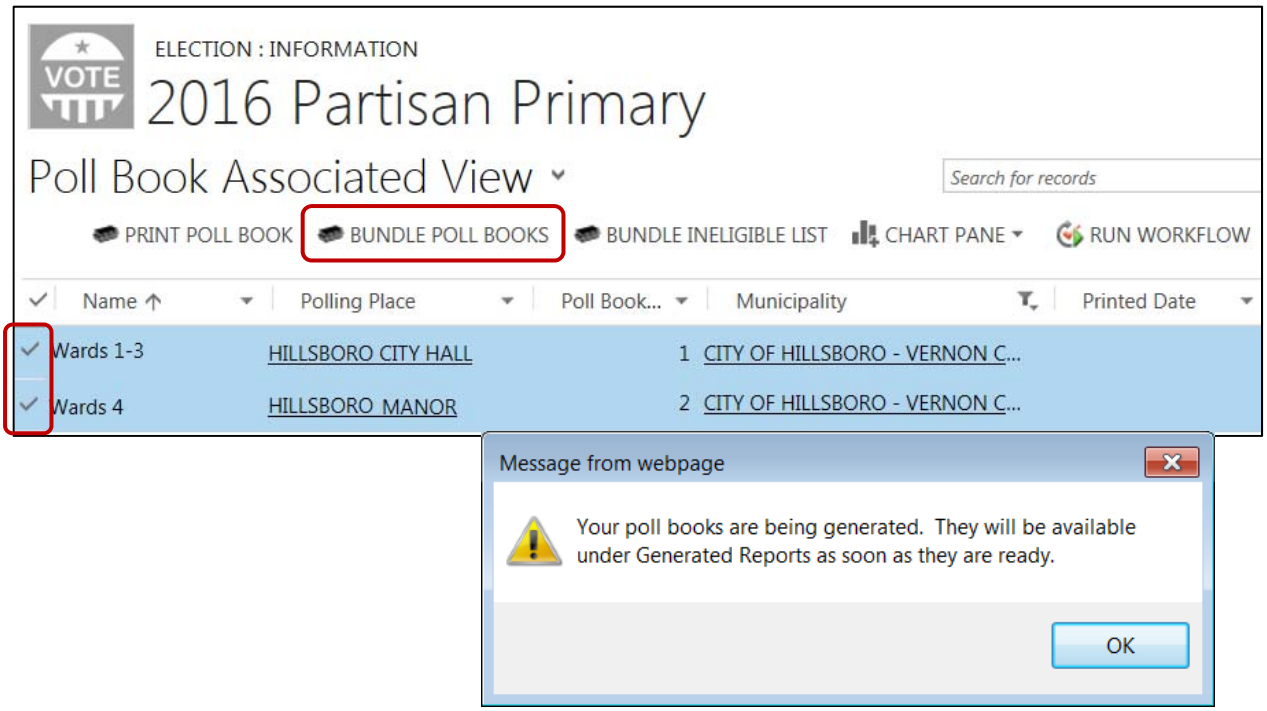
1. Click the Associated View button below the Poll Books tab



2. In the Poll Book Associated View, check the poll books you want to print

3. Click the Bundle Poll Book button to generate the poll books
   Note: two poll books must be selected to bundle poll books

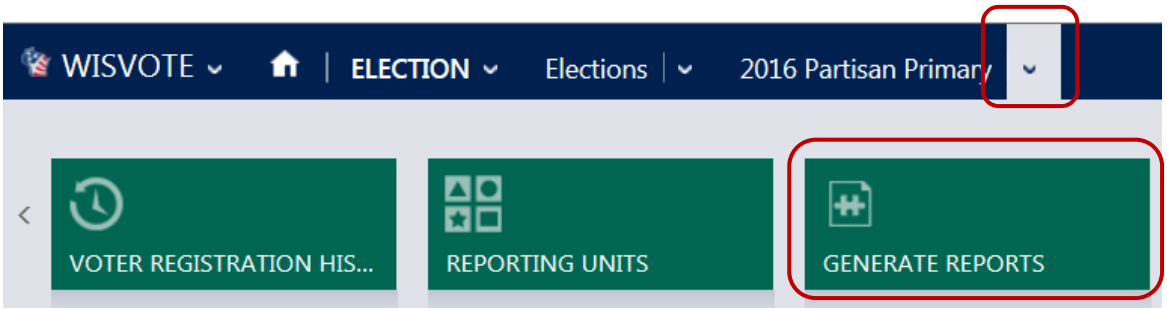
4. A *Poll books are being generated* pop-up will appear on the screen, click OK to confirm, poll books bundled are generated once every hour (9am, 10am, 11a etc.)



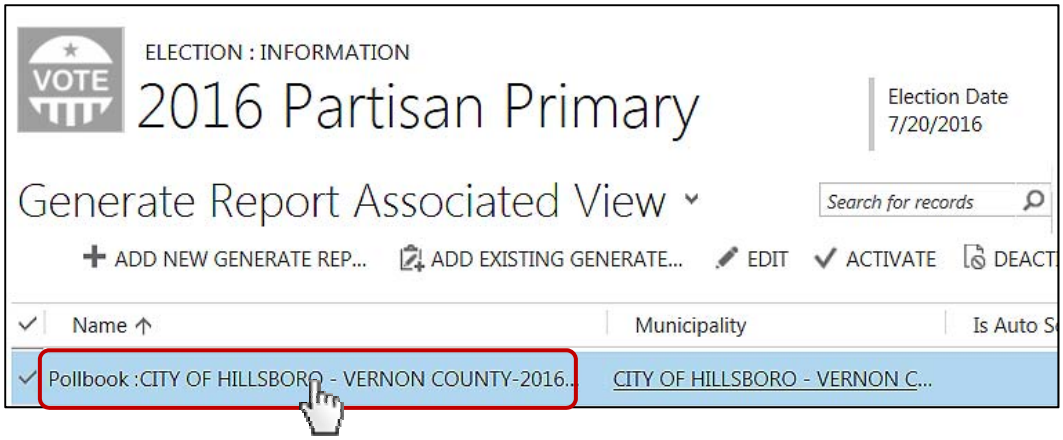
5. To retrieve the generated poll books, open the election information page,

6. Click the drop-down arrow to the right of the name of the election on the navigation bar

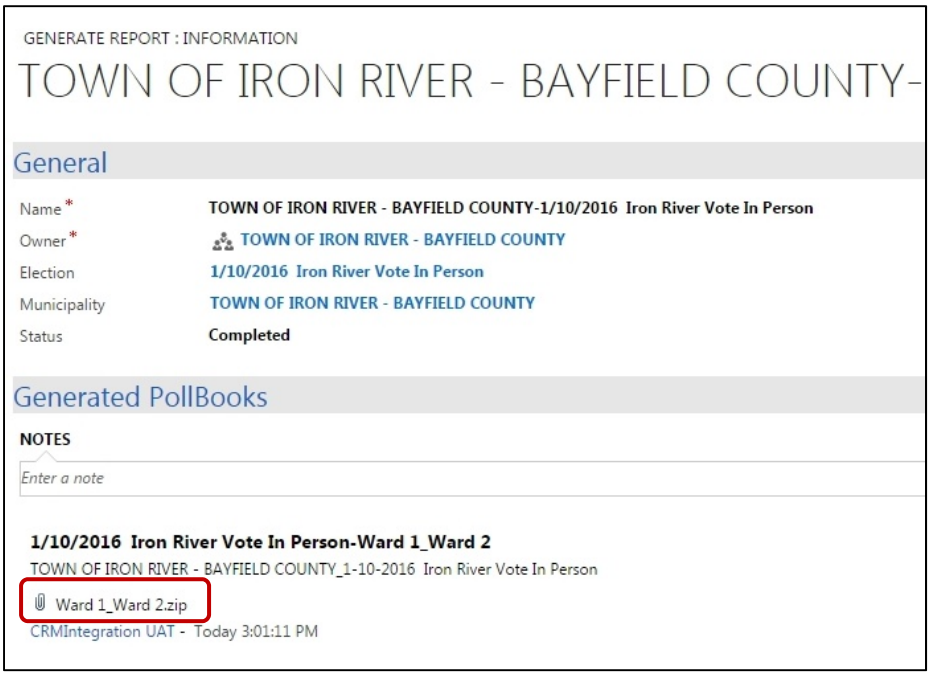
7. Scroll in the navigation bar until the Generate Reports tile appears, click the Generate Reports tile to open the Generate Report Associated View



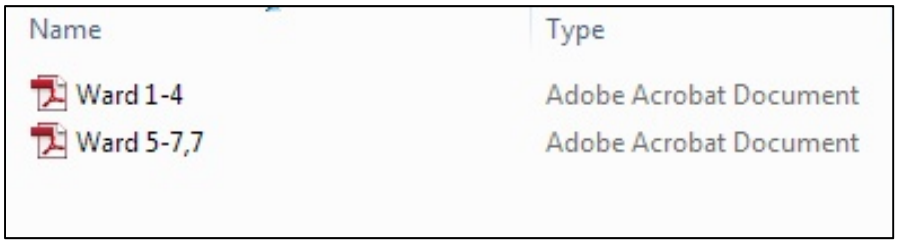
8. In the Generate Report Associated View, click the poll book bundle name



9. To open or save the poll book, click the attachment below the Generated Poll Books tab



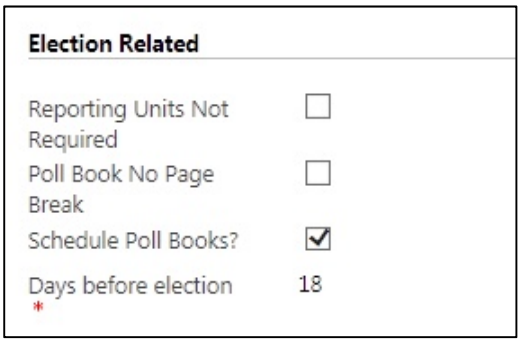
10. The poll books will be created as PDF files, click the PDF file to open and print the poll book



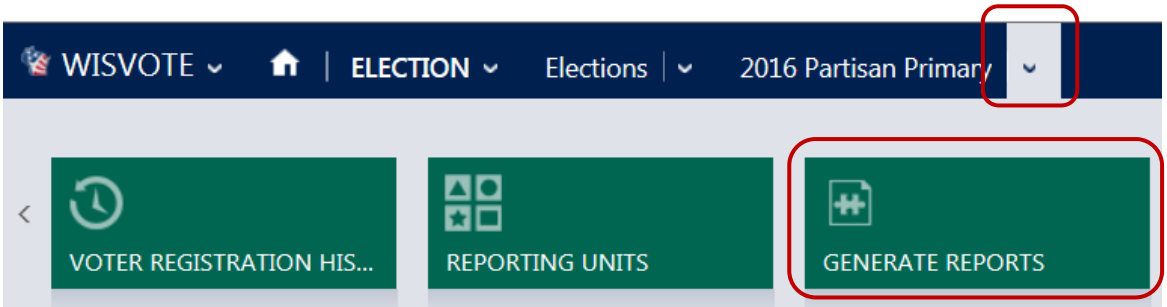
Schedule a Poll Book Print

Poll books can be scheduled to print (generate) on a specific day in the 20 days before the election. For example, poll books can be scheduled to print 16 days before the election or 2 days before the election. If this setting is selected, poll books will be scheduled to print on that day for every future election. This setting can be edited in between elections.

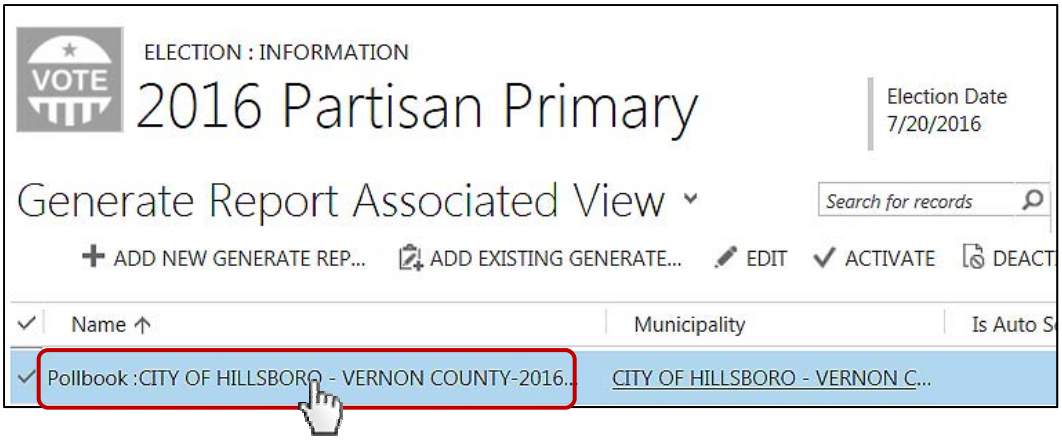
1. Click the Jurisdictions tile
2. Search for your jurisdiction
3. In the Jurisdiction Record page, select the Schedule Poll Books field
4. Enter the number of days before the election to generate your poll books



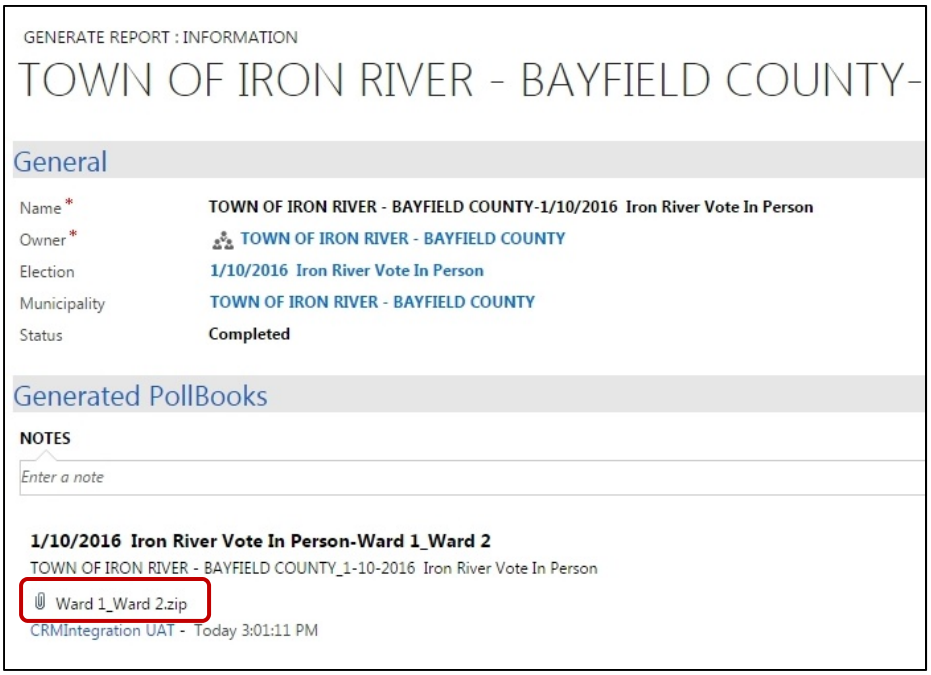
5. Click Save and Close, to save the poll book print schedule
6. To retrieve the generated poll book file, open the election information page,
7. On the top navigation bar, click the drop-down arrow to the right of the name of the election
8. Scroll in the navigation bar until the Generate Reports tile appears, click the Generate Reports tile to open the Generate Report Associated View



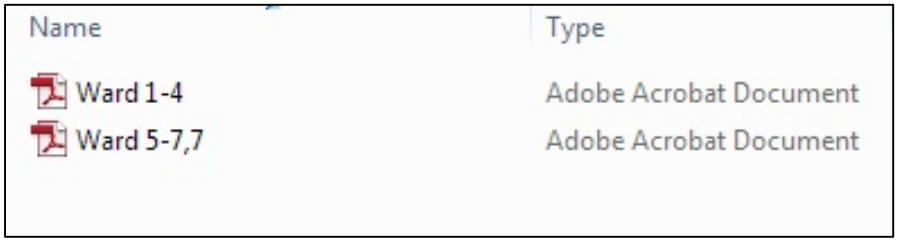
9. In the Generate Report Associated View, click the poll book bundle name



10. To open or save the poll book, click the attachment below the Generated Poll Books tab



11. The poll books will be created as PDF files, click the PDF file to open and print the poll



4.4 Office Positions

The names and contact information of current elected officials must be added and updated in WisVote so voters can view the name and contact information of their elected officials on the MyVote Wisconsin website.

Municipalities are responsible for adding and maintaining elected official records for local office positions. Counties are responsible for adding and maintaining elected official records for county, school district and joint court office positions. The State is responsible for adding and maintaining elected official records for State and Federal office positions.

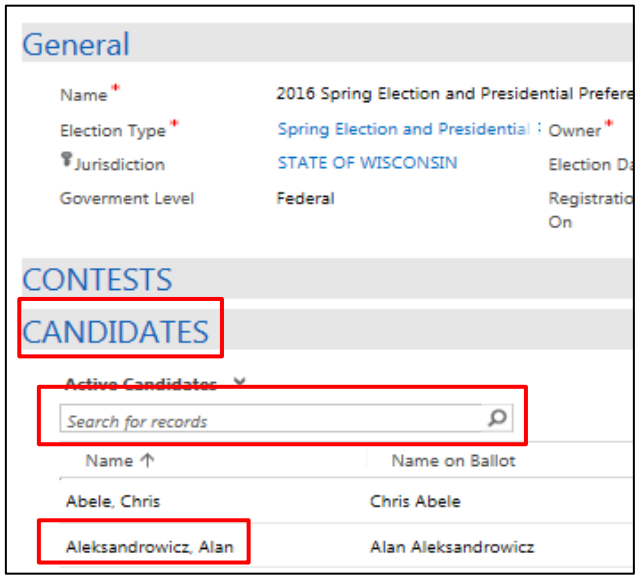
How do I Add an Elected Official in WisVote?

There are two main ways to add an elected official record in WisVote after the election. The process you use will depend on the type of contest for which you are adding an elected official. If it is a *Vote for 1* contest you will select the winner checkbox in the candidate record to add an elected official record for the candidate. If it is a *Vote for more than 1 contest,* you will use the Office Positions tile to add the elected official within the office position.

- **Vote for 1 Contests**: Select the Winner Checkbox in the Candidate Record to add an elected official
- **Vote for More Than 1 Contests**: Add an Elected Official Record from the Office Position tile

Use the Winner Checkbox in the Candidate Record to Add an Elected Official Record

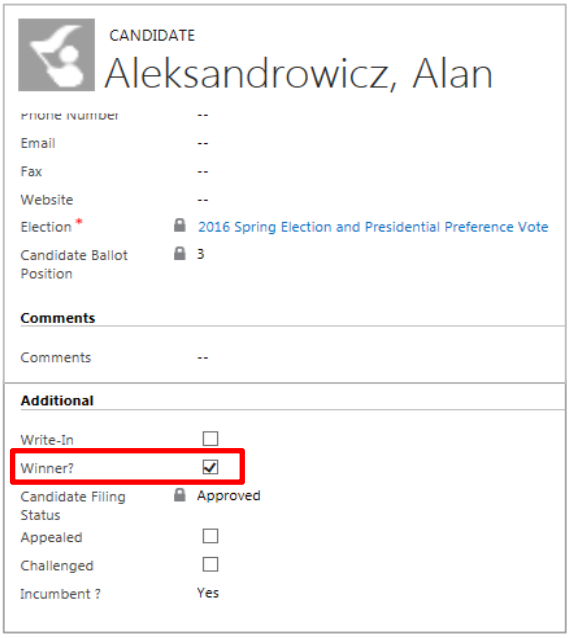
1. Click the Elections tile
2. Click the Name of the election
3. In the election information page, expand the Candidates tab
   Tip: Switch the view to "My Active Candidates" to filter for your jurisdiction's candidates
4. Search for the name of the candidate
5. Click the name of the candidate in the grid to open the candidate record



6. Select the Winner checkbox in the Additional section of the candidate record

7. Click Save to save and review the information or Save & Close to save and return to the Election Information page

A new elected official record has been created!

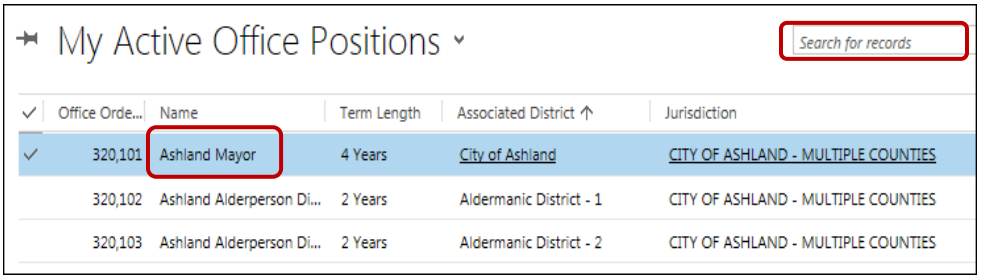


Add an Elected Official Record from the Office Position tile

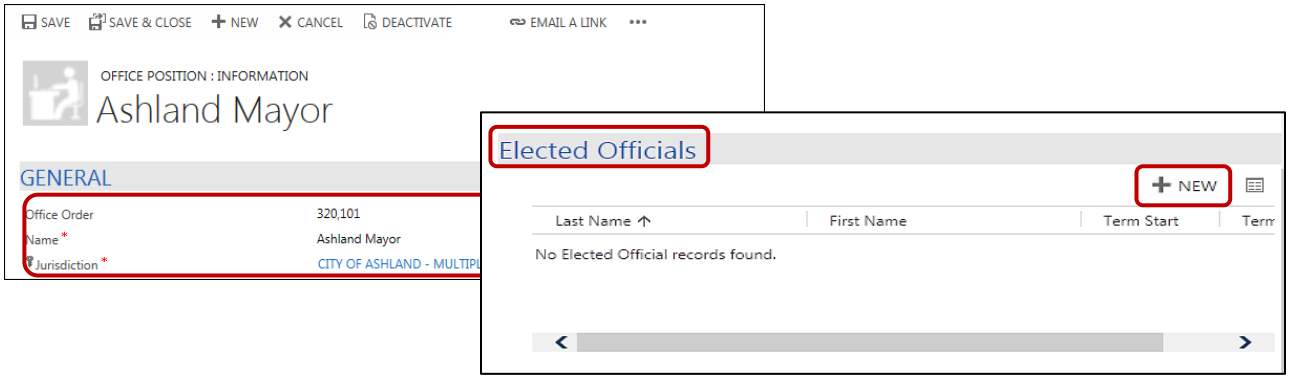
1. Click the Office Positions tile

2. Enter the name of the office position in the search bar

3. Click the name of the office position in the "My Active Office Positions" view grid to open the Office Position Information page



4. Review the office position information below the General and Other Details tab; Click the +New button below the Elected Officials tab to add an elected official record

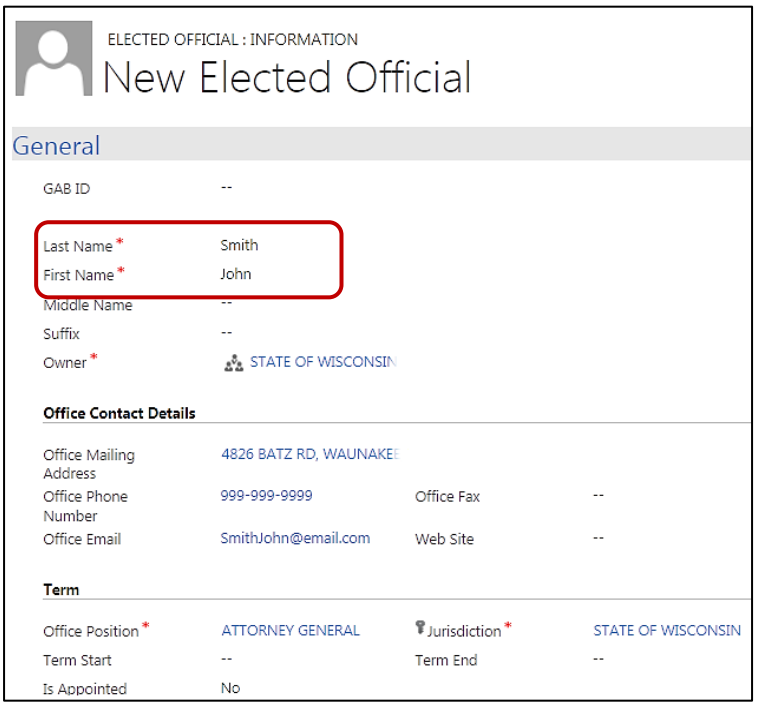


5. Enter the Last Name and First Name of the elected official in the Elected Official Information window

6. Enter any additional optional office contact information

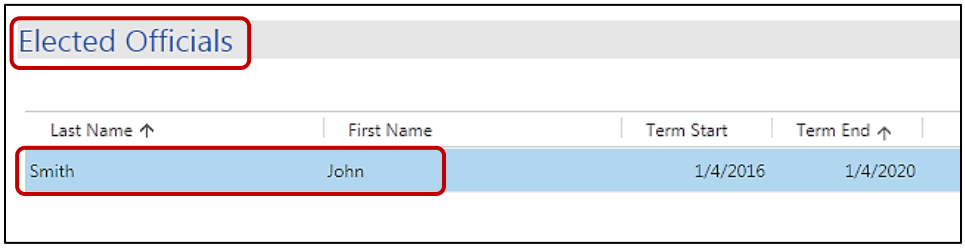
   Note: the information on an elected official's information page will display on the MyVote Wisconsin website!

7. Click Save to save and review the information or Save & Close to save and return to the Office Position Information page



Update an Elected Official Record

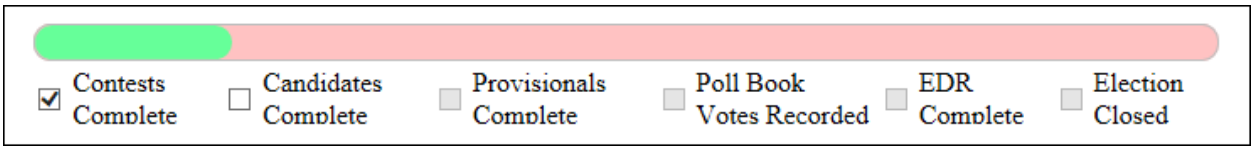
1. Click the Office Positions tile
2. Click the name of the office position in the "My Active Office Positions" view grid to open the Office Position Information page
3. Double click the name of the elected official in the grid to open the Elected Official Information page



4. Update or review the information then click Save to save and review the information or Save & Close to save and return to the Office Position Information page

4.5 Election Checkpoints

In WisVote, the stages and tasks completed throughout an election cycle are tracked using Election Checkpoints. The election checkpoints are located in every Election Information Page below the Election Progress tab. There are six election checkpoints: Contests Complete, Candidate Complete, Provisional Complete, Poll Book Votes Recorded, EDR Complete and Election Closed.



Contests Complete

The Contests Complete checkpoint is selected after all of your jurisdiction's office holder and referendum contests have been entered. Once selected, a pop-up window will prompt a review and verify the contest information.

A user can uncheck the Contest Complete Checkpoint to add or edit a contest. If a new contest is added, ballot styles will be regenerated when the contest complete checkpoint is checked again. When ballot styles are regenerated, the system clears any custom ballot style information entered by the user, including ballot styles that have been renamed. Unchecking the Contests Complete Checkpoint will uncheck all of the other checkpoints. The Contests Complete Checkpoint must be selected before absentee ballots can be issued.

Candidates Complete

The Candidates Complete checkpoint is selected after all of your jurisdiction's candidate information has been entered and the candidate filing status has been finalized. Once the checkpoint is selected, a user can uncheck the checkpoint to add or edit a candidate filing.

Unchecking will unpublish your contests and candidates from MyVote. **This affects Military Online Ballots and sample ballots for MyVote users.**

The Contest Complete Checkpoint must be selected before the Candidates Complete Checkpoint can be selected. The Candidates Complete Checkpoint must be selected before absentee ballots can be issued.

Provisionals Complete

The Provisionals Complete checkpoint is selected once all of the provisional ballots have been entered into WisVote on Election Night. **If you do not issue any provisional ballots for the election, there are no required steps on Election night. Check the Provisionals Complete Checkpoint by the preceding Friday.** Once the checkpoint is selected, a user can uncheck the checkpoint to add or edit provisional ballots.

Poll Book Votes Recorded

The Poll Book Votes Recorded checkpoint is selected after all of your jurisdiction's voter participation records have been recorded. A user can unselect the Poll Book Votes Recorded checkpoint to add or edit voter participation.

EDR Complete

The EDR Complete checkpoint is selected after all of your jurisdiction's election day registrations have been recorded. Once selected, a confirmation window with the number of Election Day registrations that have been entered will appear. A user can uncheck the EDR Complete checkpoint to add or edit an Election Day registration.

Election Closed

The Election Closed checkpoint is the final step of the election process in WisVote. This checkpoint is selected after recording voter participation, entering provisional ballots, and completing their reports in Canvass and WEDCS when necessary.

Until you check this checkpoint, the Election Plan associated with the election will be locked in order to preserve your reporting units. When the Election Complete checkpoint is checked, it sends a signal to WisVote to freeze the reporting units associated with the election in order to preserve the reporting unit structure of the election. If you need to make adjustments to the election, you can uncheck the Election Complete Checkpoint, make your changes, and recheck the checkpoint.

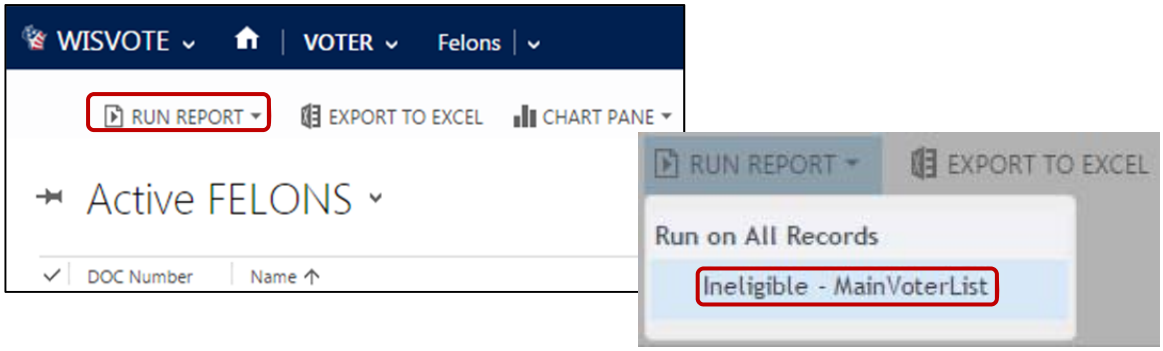
4.6 Ineligible Voter List

The Ineligible Voter List is a list of all felons who have addresses in your municipality and are currently on probation, parole or extended supervision through the Wisconsin Department of Corrections (DOC). The voting rights of these individuals have not been restored as of the date this list was issued and will not be restored until the individual completes the terms of his or her sentence. The information on this list is provided by the Department of Corrections (DOC) and is updated nightly.

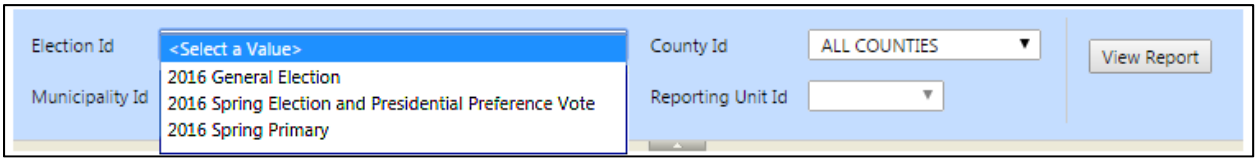
The lists are used in the clerk's office during late registration, issuing absentee ballots, and for Election Day registrations at the polling place. Refer to the list ONLY during late registration, issuing absentee ballots and for Election Day registrations. It is not necessary to compare this list with voters who are already registered as this is handled through the Registration List Alerts in WisVote. Felon alerts should be reviewed prior to printing poll books; therefore, matching the list against the poll book prior to issuing a ballot on Election Day is not necessary.

Print Ineligible Voter List

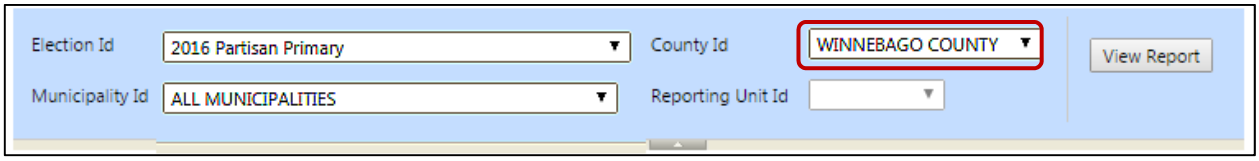
1. Click the Felon tile to open the Active Felons View page
2. Click the Run Report button and select *Ineligible – MainVoterList*



3. A new window opens. Configure the Report Viewer to customize your report. Select an Election from the drop-down list

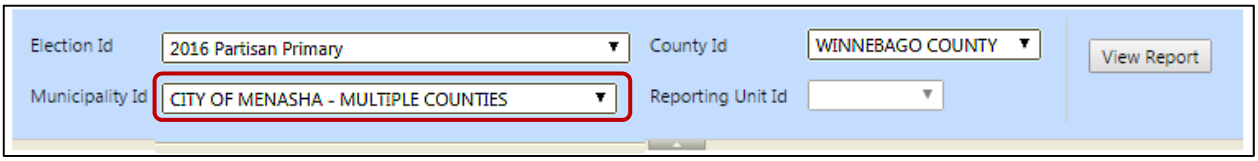


4. To search all of Wisconsin accept the All Counties default or choose a county from the drop-down list



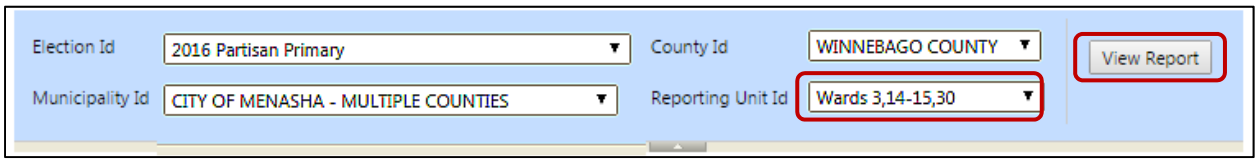
5. To search all the municipalities accept the All Municipalities default or choose a specific municipality from the drop-down list

   Note: Municipalities in multiple counties will need to select each county and run the list for the reporting units in that county.

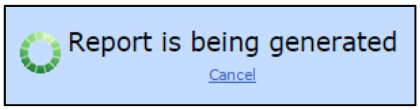


6. Select a reporting unit from the drop-down list. (The reporting units listed are the names given to them by the municipalities in the Election Plan associated with the type of election)

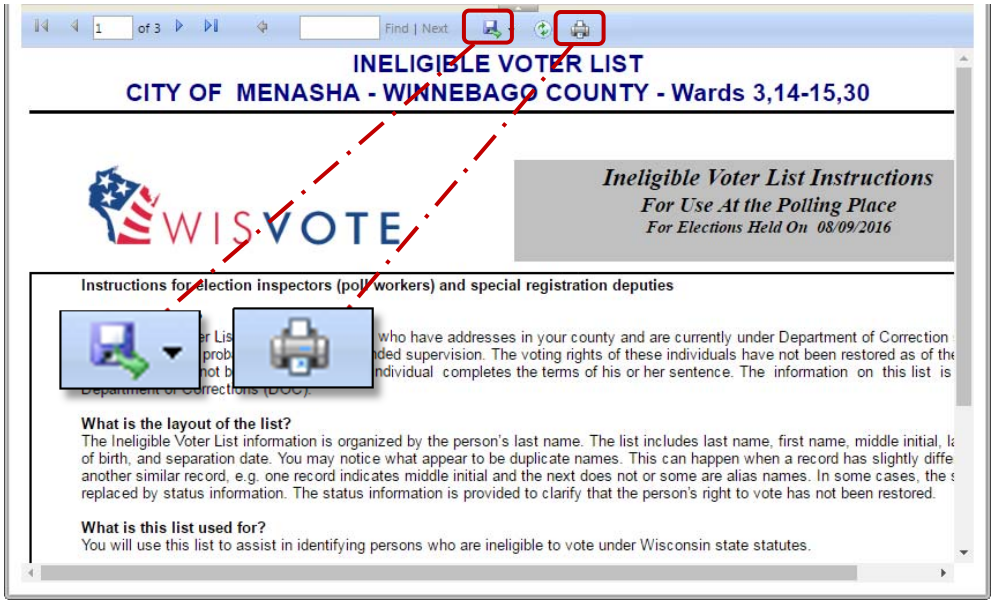
   Note: If All Counties or All Municipalities are selected this option is not applicable.



7. Click the View Report button to create a report



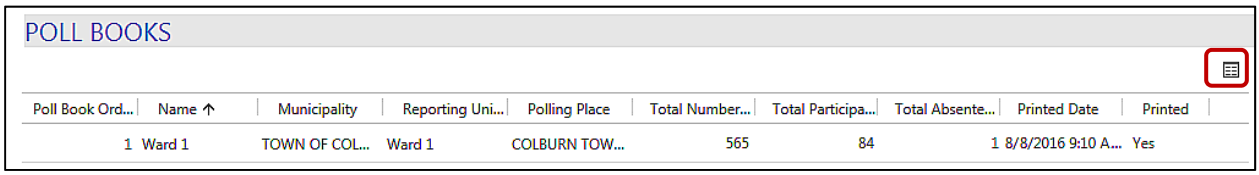
8. The report can be printed directly or exported to a file by clicking on the Disk or Printer icon
   Note: the Chrome browser does not have a Printer icon; click the disk icon, then save and print it from your computer



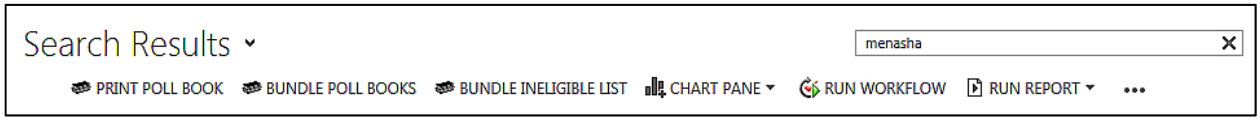
The page count in the preview does not reflect the actual number of pages in the report.
To find the number of pages you should export the report to an Adobe PDF file and the number of pages will display correctly in Adobe.

Access from Elections – Bundled Report

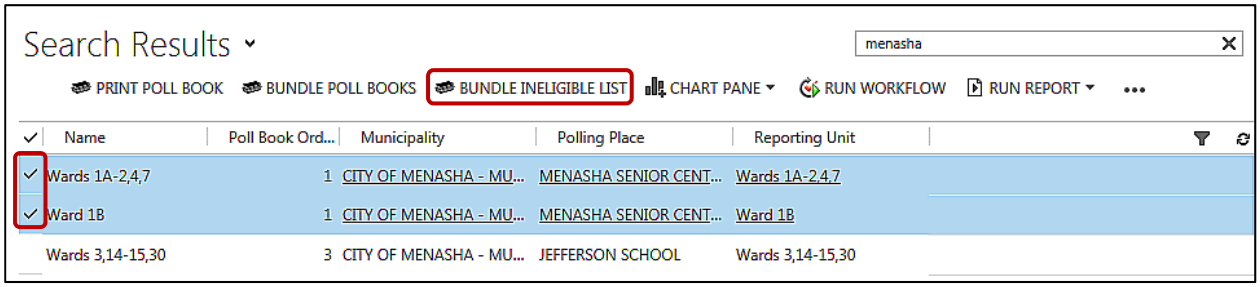
1. Click the Elections tile to open the Current Elections View page
2. Click an election from the list
3. Expand the Poll Books tab
4. Click the Expand icon



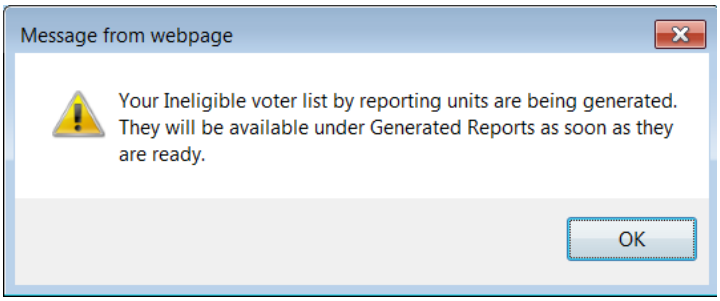
5. To find your municipality wards from the greater list, click in the Search field, enter your municipality and press Enter or click the magnifying glass



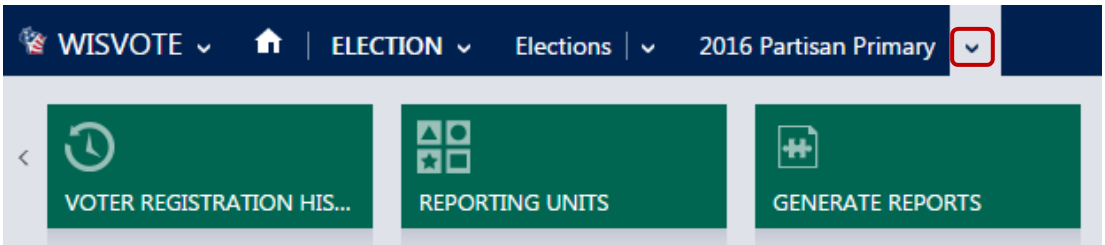
6. To create one report that contains multiple lists separated by wards or reporting units, place checks in front of the poll book name of the ward or reporting units to include in the bundled report. Click the Bundle Ineligible List button



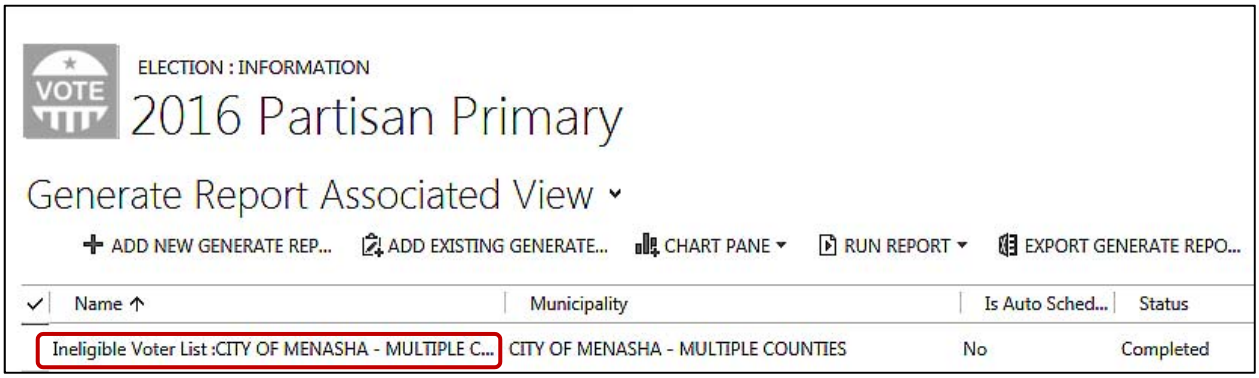
7. A message will appear stating *Your Ineligible voter list by reporting units are being generated. They will be available under Generated Reports as soon as they are ready.* Click OK



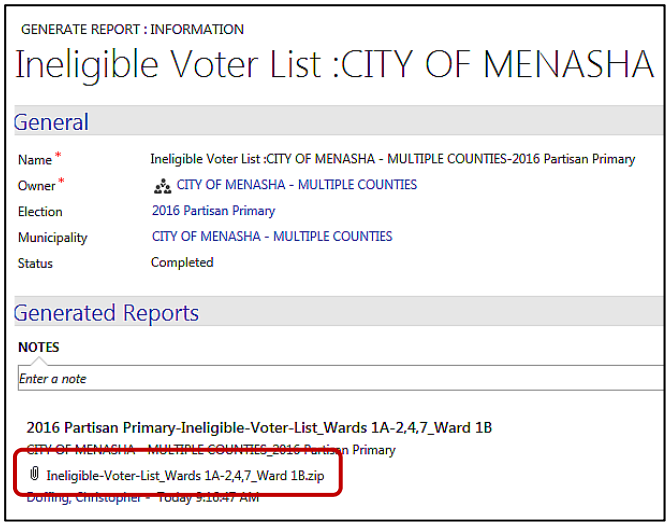
8. Click the drop-down arrow to the right of the name of the election to display the navigation bar
9. Click the Generate Reports button (Click the arrow > to proceed across the bar to view more tiles)



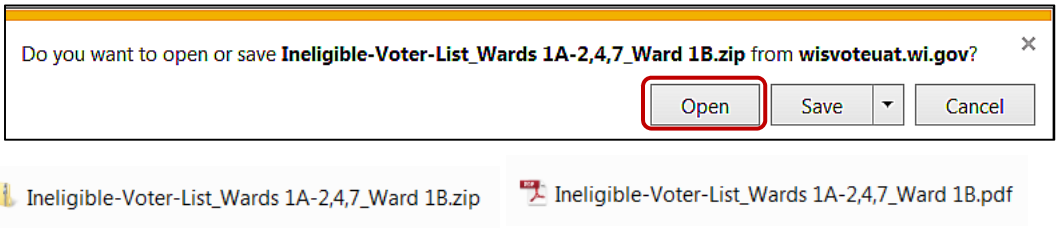
10. From the Generate Report Associated View click to select the Ineligible Voter List to view the report



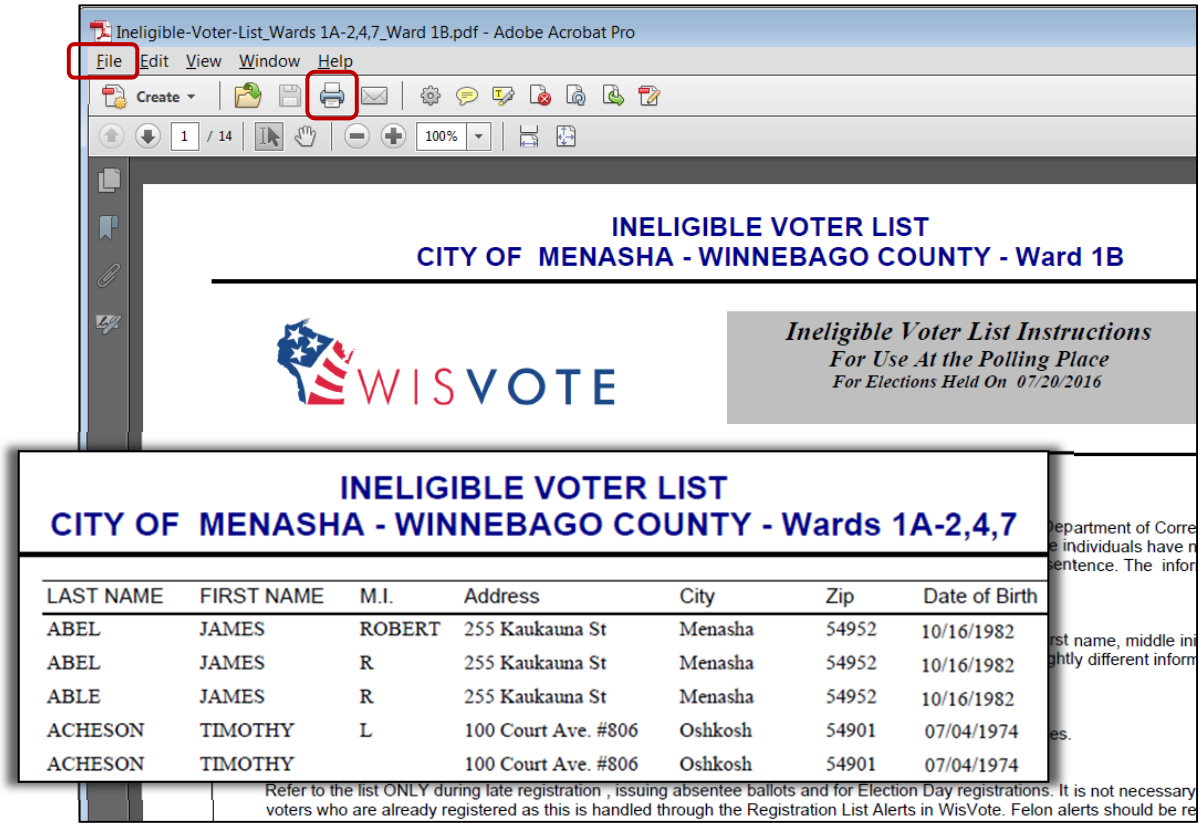
11. The Generate Report Information screen opens, click the pdf file to access the ineligible voter list



12. You may be prompted to Open or Save the file



13. It may be easier to first open the file, click Print and then File | Save As to save to your desktop



FAQ - Separation Date No Longer Available

The Ineligible Voter List no longer includes the **separation date** in its printout. The Department of Correction (DOC) data feed has removed that date. What we used to print was a projected date that was often inaccurate and caused confusion.

WisVote now gets a daily update from DOC. Clerks should concentrate on noticing what names are on the list. Noting a person who is released after the date the report is printed, but before Election Day, could be on the list. The G.A.B. does not have an accurate way of identifying those felons who are on the list, but could be released before Election Day. If a person is on the list and that person believes they should not be, clerks can look up the record in WisVote to see if the felon has had their rights restored and is no longer on the list. If you have question on Election Day contact the Elections Helpdesk and we can confirm the status with DOC. Clerks should be aware that printing a new list closer to Election Day will produce a more accurate list for use at the polling place for Election Day registrations (EDR).

5.1 Create a Special Election

In WisVote regularly scheduled elections are automatically setup by the system and special elections are manually setup by the user.

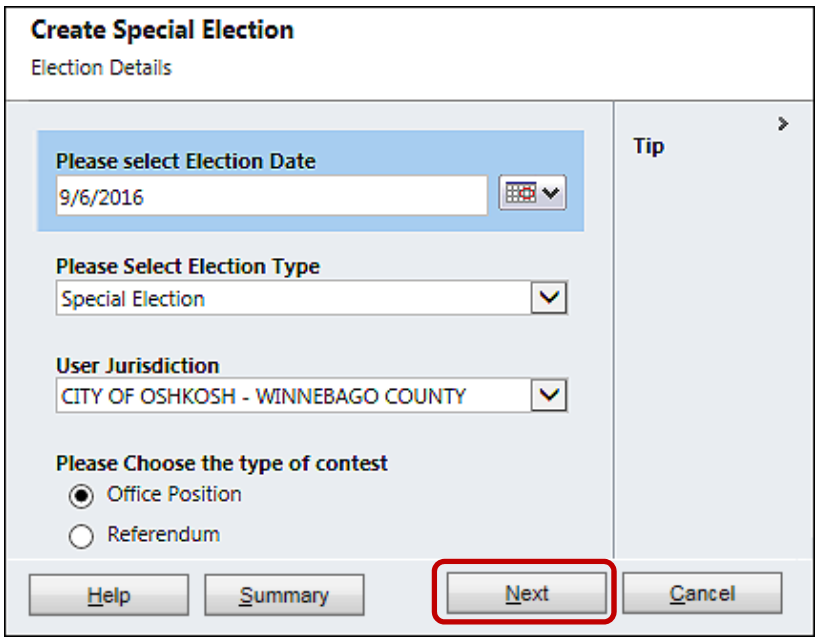
Election Creation in WisVote

WisVote automatically creates most elections based on the contests and office position information that is programmed into the system. However, there are some elections that have to be manually entered by the user. The elections a user has to manually enter into WisVote are:

- Special Elections
- Special Referenda Elections

Create a Special Election for an Office Position

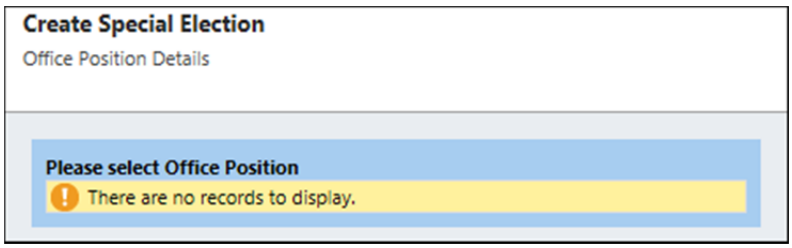
1. Click the Special Election tile
2. Enter the Election Date in the Special Election Wizard
3. Select the Election Type
4. Review the Jurisdiction
5. Select Office Position as the Contest Type, then click Next



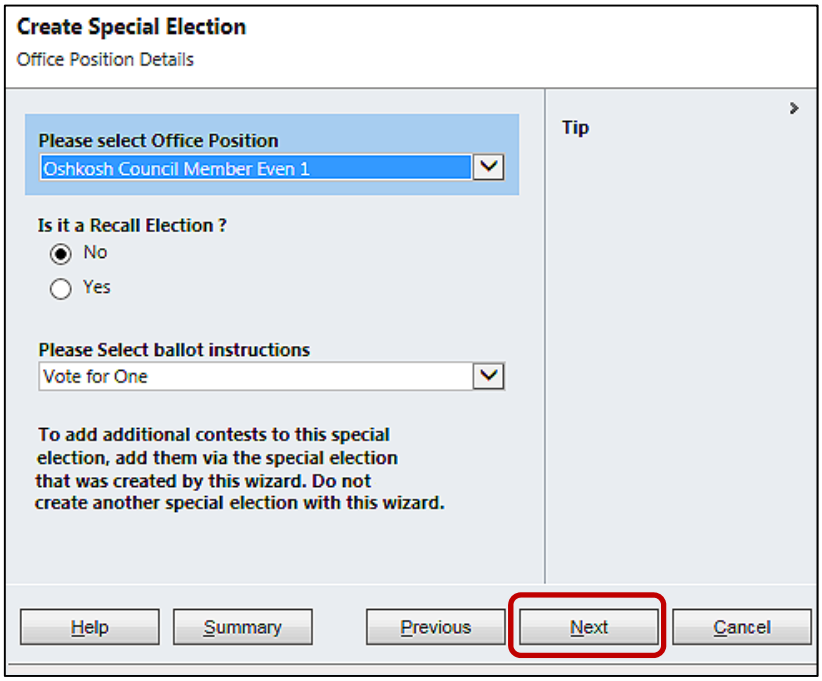
6. Select the Election Plan, then click Next
7. Select the District Type associated with Office Position
8. (Optional) Enter the Office Position Name

9. Click Next

Note: If the Office Position displays a message, *There are no records to display* click Previous and change the Office Position Type



10. Select the Office Position from the drop-down list
11. (If applicable) Select Yes if there is a Recall Election
12. Select the Ballot Instructions, then click Next

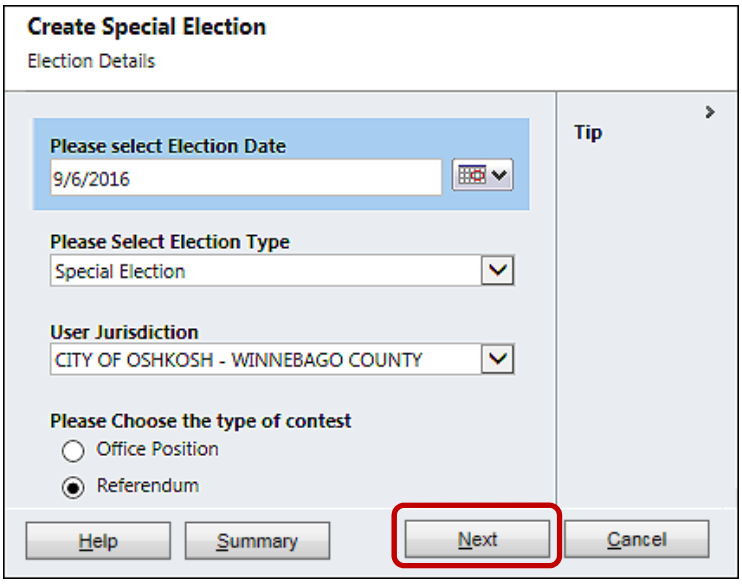


13. Click Finish to create the Special Election

Create a Special Election for a Referendum

1. Click the Special Election tile
2. Enter the Election Date in the Special Election Wizard
3. Select the Election Type
4. Select the Jurisdiction

5. Select Referendum as the Contest Type, then click Next

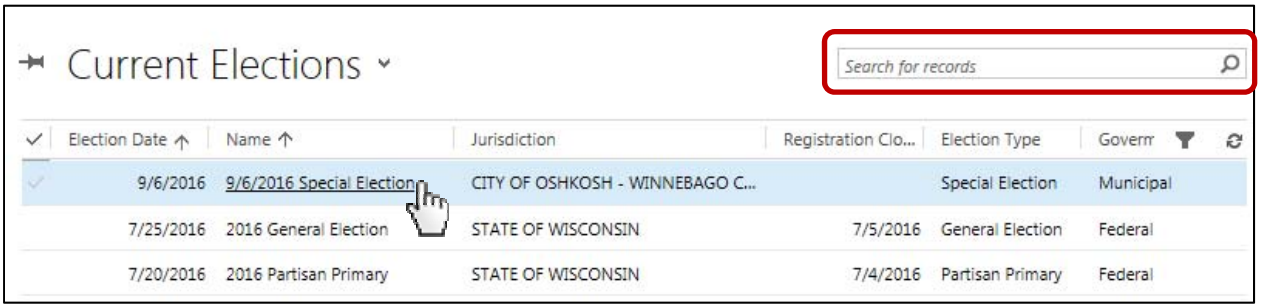


6. Select the Referenda District Type, then click Next
7. Select the Referenda District
8. Enter the Referenda Title
9. Enter the Referenda Question
10. Click No to use the default Yes and No answers, then click Next
11. Click Yes to create custom answers, then click Next
    - Enter the Custom Answers, then click Next
12. Click Finish to create the Special Election

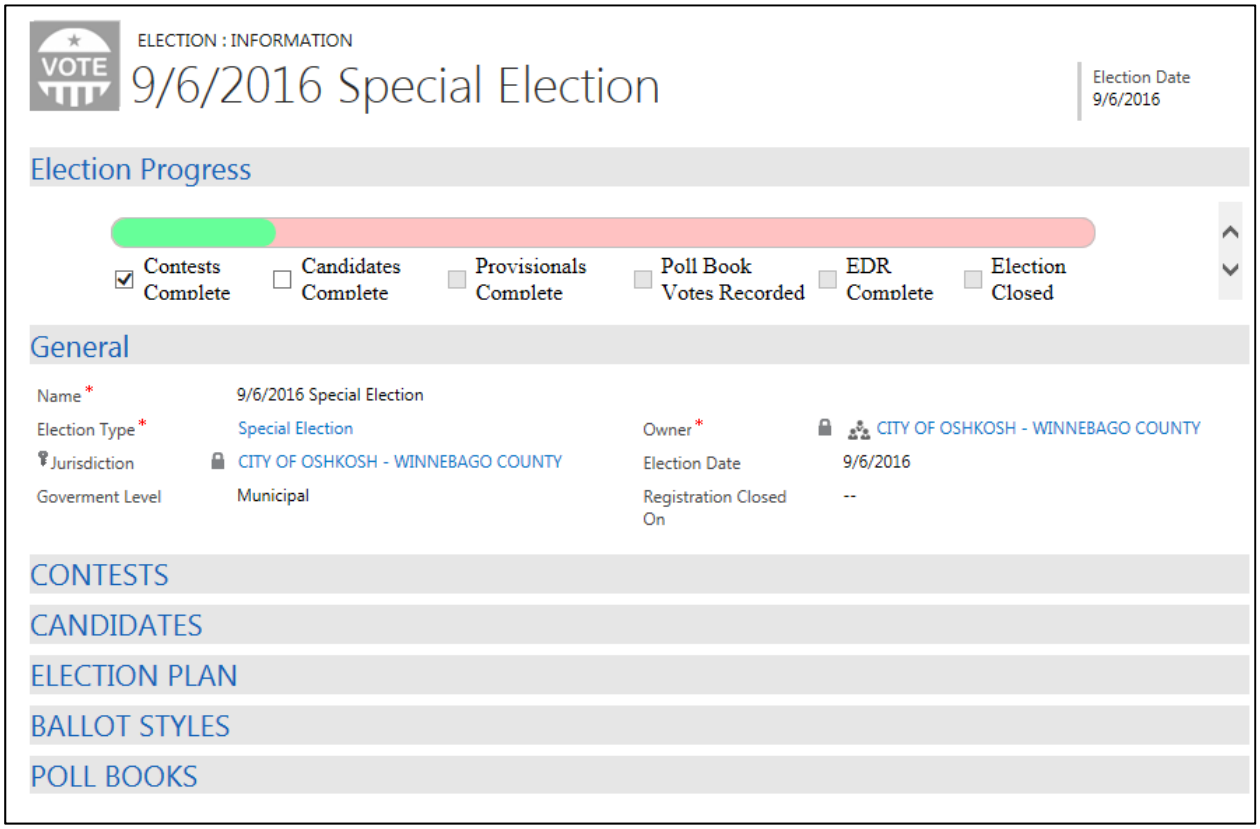
> *Type the referenda question exactly as you want it to appear on the ballot.*

Review Special Election Information

1. To search for and review a special election, click the Elections tile to open the Elections view page
2. To search for an election, enter the Date or Name of the election in the search box at the top of the *Current Elections* view page, then click the Election name to open the Election Information page



3. Click the name of the election to open the Election Information page and review the election information



5.2 Contests

A contest is either a race for an elected office or a referendum. WisVote uses contest information to determine ballot styles, absentee eligibility, and to populate sample and online (military) ballots on the MyVote Wisconsin website: myvote.wi.gov.

Contest Jurisdiction in WisVote

In Wisconsin, each level of government is responsible for creating and managing a unique set of contests.

State	County	Municipal
Federal Offices	County Offices	Municipal Offices
State Offices	County Referenda	Municipal Referenda
Statewide Referenda	School District Offices	Sanitary District Offices
Technical College Referenda	School District Referenda	
	Joint Municipal Court Offices	

Manual Entry of Contests

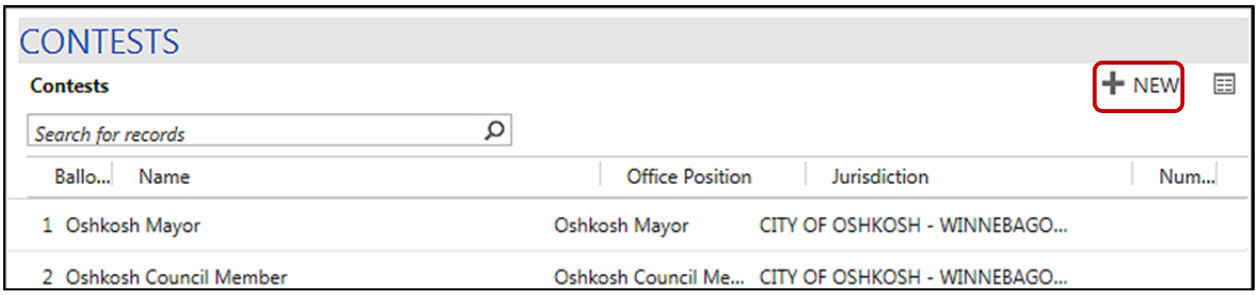
WisVote automatically creates most contests for an election based on the office position information that is programmed into the system. However, there are some contests that have to be manually entered by the user. The contests a user has to manually enter into WisVote are:

- **County and Municipal Referenda**
- **County and Municipal Special Contests**
- **<u>All Contests</u> for a New Office Position**

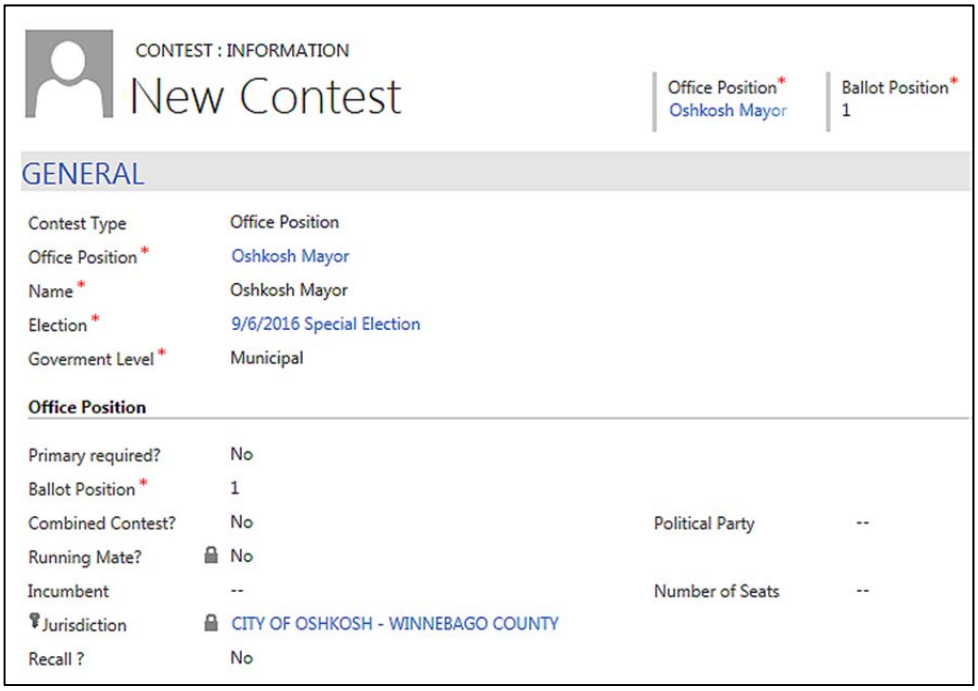
> ! *Please call the Elections Helpdesk to update office position information in WisVote!*

Add a Contest for an Office Position

1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. Click the Contests tab to expand the view
4. Click the +New button to Add a Contest



5. In the New Contest window, select Office Position as the Contest Type
6. Enter the office position in the Office Position field, or press the magnifying glass to search for, and select the office position from the drop-down list
7. Review the information in the automatically populated Contest Name, Government Level and Jurisdiction fields

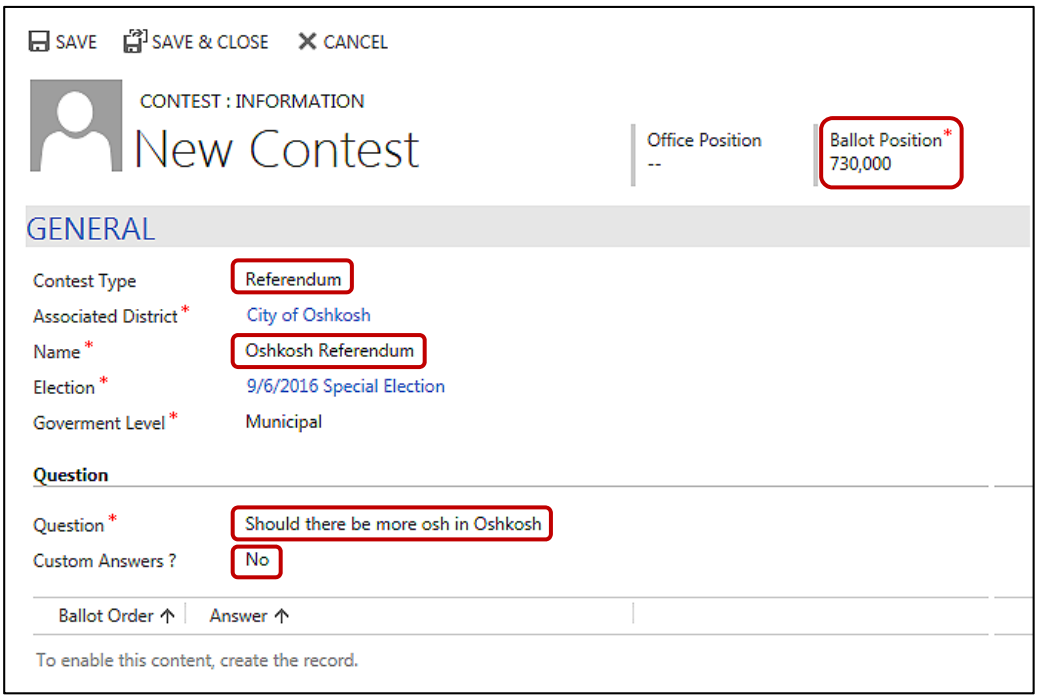


8. Click the Ballot Instructions field and select the ballot instructions for the contest
9. Click Save to save and review the contest information or Save & Close to save and return to the Election Information page

Add a Contest for a Referendum

1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. Click the Contests tab to expand the view
4. Click the +New button to Add a Contest
5. Select Referendum as the Contest Type
6. Enter the associated district in the Associated District field, or press the magnifying glass to search for and select the associated district from the drop-down list
7. Enter the referendum contest name in the Name field
8. Click the Government Level field and select the government level
9. Enter the referendum question in the Question field
10. Enter the Ballot Position (see chart next page)

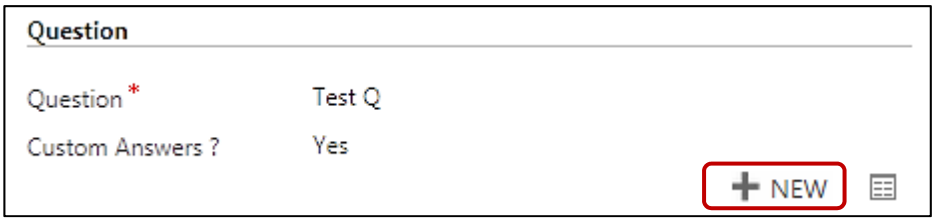
> ! *Type the referendum question exactly as you want it to appear on the ballot!*



11. Custom Answers
    - If the referendum is answered Yes or No leave the default
    - If there are custom answers enter Yes; click Save (see last page of this section)
12. Click Save & Close to save and return to the Election Information page

Create Custom Referendum Answers

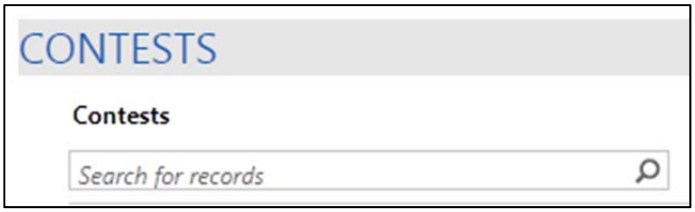
1. If your referendum contest requires answers other than Yes and No, click the Custom Answers field and select Yes
2. Click the +New button to Add Custom Answers



3. In the *New Answers* window, enter the first custom answer in the Answer field and the ballot order then click Save & Close
4. From the Contest Information page, click the +New button again to open the *New Answers* window and add the second custom answer and ballot order then click Save & Close
5. Review the custom referendum answers and their ballot order, then click Save & Close to save the referendum contest and return to the Election Information page

Search for, Review and Update a Contest

1. To search for, review and update a contest click the Elections tile
2. Click the name of the election to open the Election Information page
3. Click the Contests tab to expand the view
4. To search for a contest, enter the Contest Name in the search box; the search results will display in the contest information grid below



5. To review and update a contest, follow steps 1-3 then click the Contest Name in the contest information grid
6. In the Contest Information page, review and/or update the contest information then click Save to save and review the updated information or Save & Close to save and return to the Election Information page

Contests Complete Checkpoint

Select the Contests Complete checkpoint after all of your jurisdiction's office holder and referendum contests have been entered. Once selected, you will be prompted to review and verify the contest information.

A user can uncheck the Contest Complete Checkpoint to add or edit a contest. If a new contest is added, ballot styles will be regenerated when the contest complete checkpoint is checked again. When ballot styles are regenerated, the system clears any custom ballot style information entered by the user, including ballot styles that have been renamed.

> ! *Unchecking the Contests Complete checkpoint will uncheck all of the other checkpoints!*

Referenda Ballot Positions

Referenda *Numbering Scheme for Ballot Positions in WisVote*

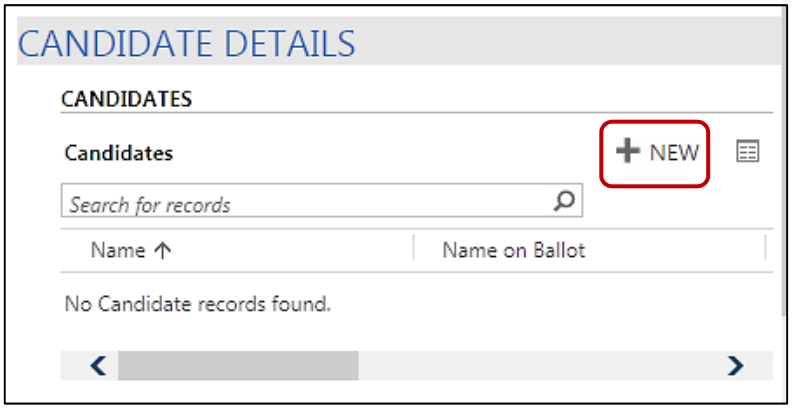
State:	700000 - 709999
County:	710000 - 719999
Multi-Jurisdictional Judge:	720000 - 729999
Municipality:	730000 - 739999
Union/ Unified School District:	800000 - 899999
Common School District:	900000 - 969999
Special District:	970000 - 999999

5.3 Candidates

Before adding and approving a Candidate for an election, the contest for which the candidate is filling must be successfully setup in WisVote.

Add a Candidate from the Election Information Page

1. Click the Elections tile
2. Click the Election Name to open the Election Information page
3. Click the Candidate Details tab to expand the view
4. Click the *+New* button to Add a Candidate



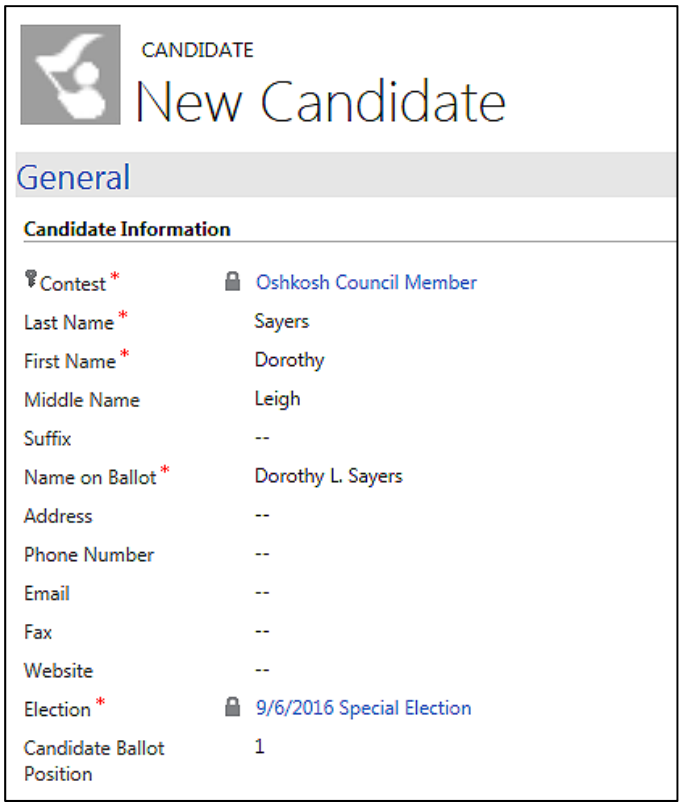
5. In the *New Candidate* window, press Enter or click the magnifying glass to select the contest from the drop-down list

6. Enter the candidate's Last Name, First Name and optional Middle Name or Suffix

7. In the Name on Ballot field, enter the candidate's name as it will appear on the ballot

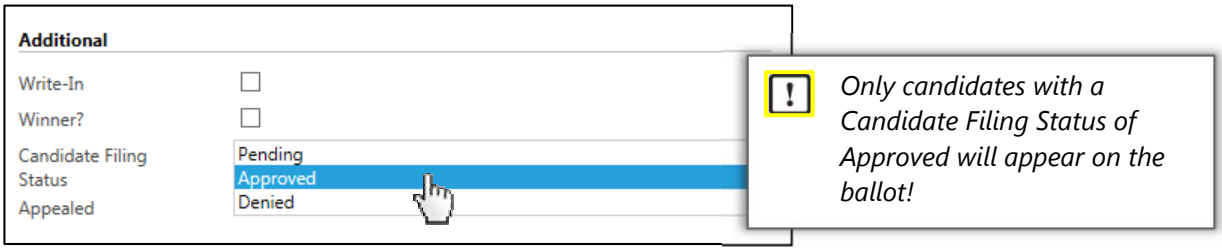
8. Enter any additional information in the optional Candidate Information fields

9. In the Candidate Ballot Position field, enter the order the candidate's name will appear on the ballot



10. If the candidate qualifies for ballot placement, click the Candidate Filing Status field to change the status from Pending to Approved

11. If the candidate does not qualify for ballot placement, click the Candidate Filing Status field to change the status from Pending to Denied



12. If the Candidate is an Incumbent, click the Incumbent? field to change the response from No to Yes

13. Click Save to save and review the candidate information or Save & Close to save and return to the Election Information page

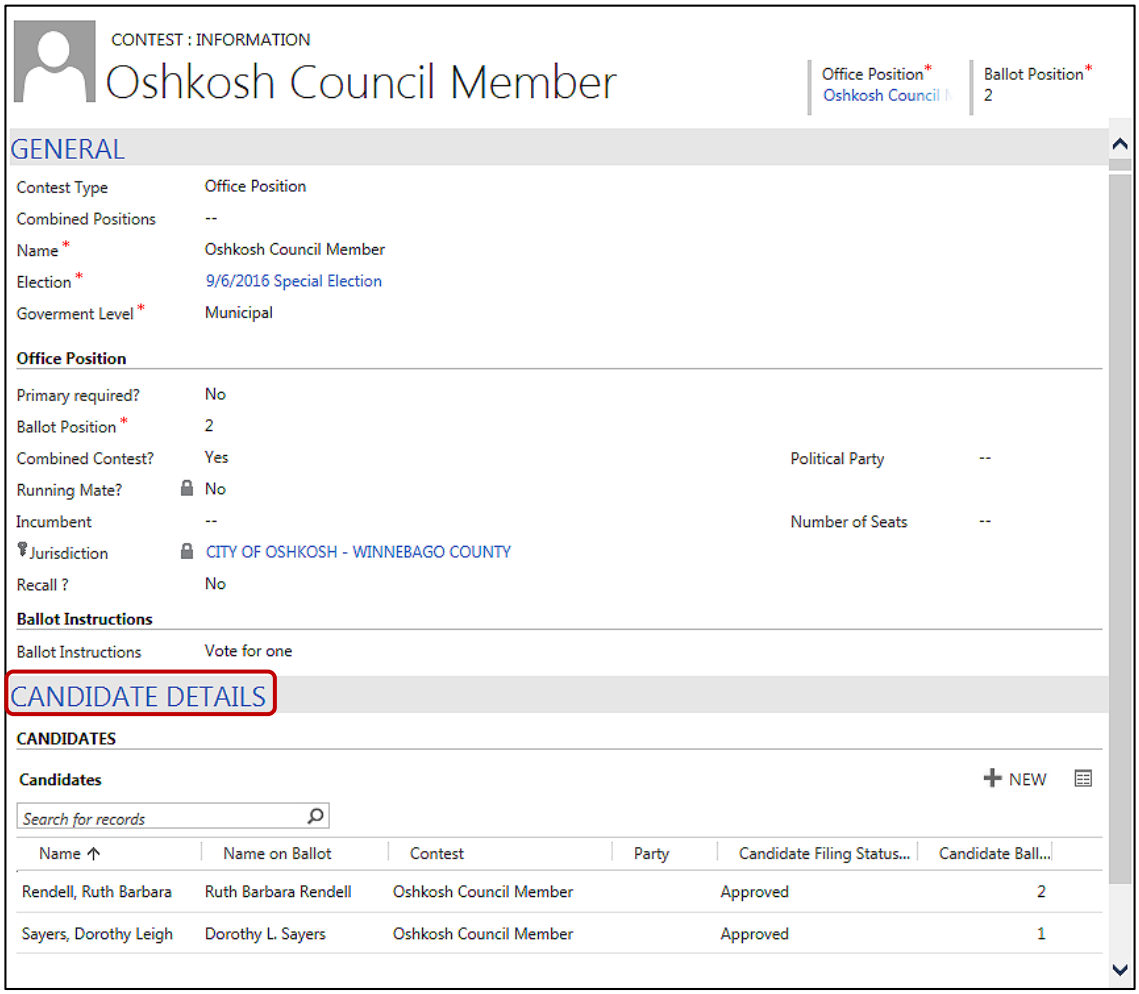
Add a Candidate from the Contest Information Page

Alternatively, the contest page allows an easy review of all the candidates entered for that contest and the Contest field is prefilled.

1. Click the Elections tile

2. Click the Election Name to open the Election Information page

3. Click the Contests tab to expand the view



4. Click the Contest Name to open the Contest Information page

5. Click the Candidate Details tab to expand the view, then click the *+New* button to Add a Candidate

6. In the New Candidate window, enter the candidate's Last Name, First Name and optional Middle Name or Suffix

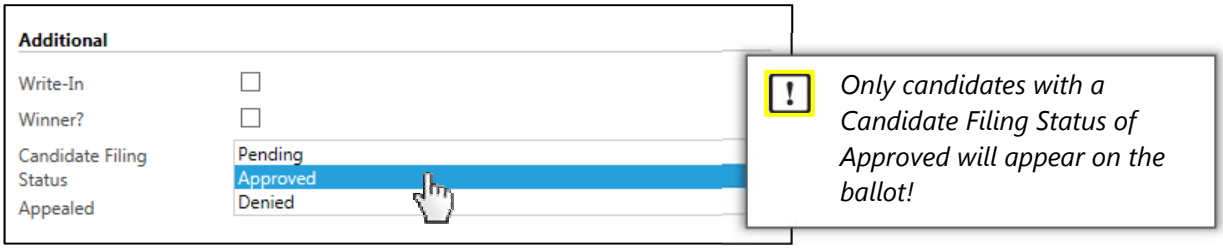
7. In the Name on Ballot field, enter the candidate's name as it will appear on the ballot

8. Enter any additional information in the optional Candidate Information fields

9. In the Candidate Ballot Position field, enter the order the candidate's name will appear on the ballot

10. If the candidate qualifies for ballot placement, click the Candidate Filing Status field to change the status from Pending to Approved

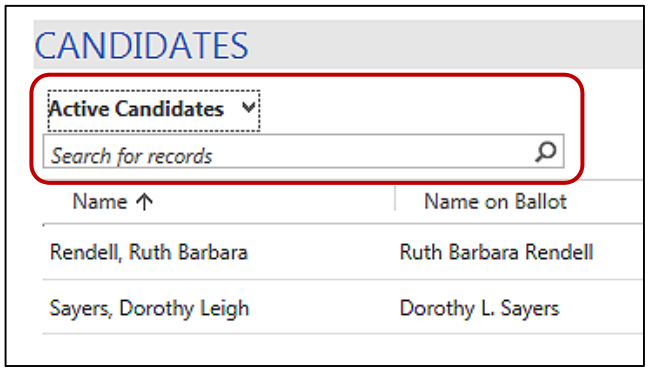
11. If the candidate does not qualify for ballot placement, Click the Candidate Filing Status field to change the status from Pending to Denied



12. If the Candidate is an Incumbent, click the Incumbent? field to change the response from No to Yes
13. Click Save to save and review the candidate information or Save & Close to save and return to the Election Information page

Search for, Review and Update a Candidate

1. To search for, review and update candidate information, click the Elections tile
2. Click the Election Name to open the Election Information page
3. Click the Candidates tab to expand the view and see a list of Active Candidates
4. To search for a candidate, enter the candidate name in the search box
5. To review and update candidate information, click the Candidate Name in the candidate information grid to open the Candidate page



6. Review and/or update the candidate information then click Save to save and review the updated information or Save & Close to save and return to the Election Information page

Candidates Complete Checkpoint

Select the Candidates Complete checkpoint after all of your jurisdiction's candidate information has been entered and the candidate filing status has been finalized. Once the checkpoint is selected, a user can unselect the checkpoint to add or edit a candidate filing.

Unchecking the Contests Complete checkpoint will uncheck all of the other checkpoints!

5.4 Ballot Styles

A Ballot Style is the unique combination of contests and candidates that will appear on a voter's ballot. All voters assigned to a particular ballot style in WisVote will have the exact same set of contests and candidates on their ballot.

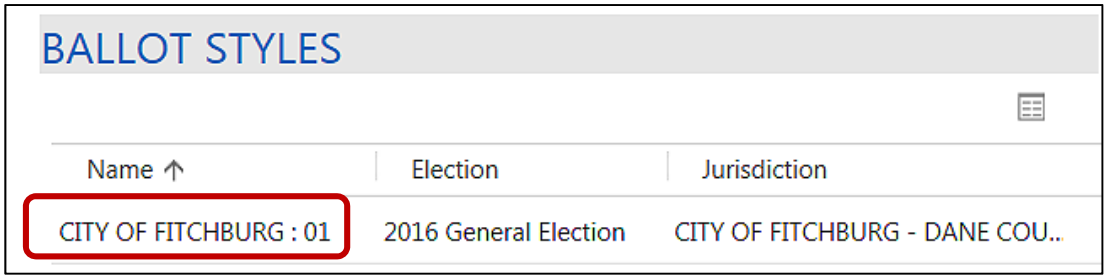
When an election is created in WisVote, ballot styles are automatically generated based on a user's contests and district combinations. Ballot styles are re-generated after a user has entered any necessary contests for the election and has checked the contest complete checkpoint.

Exploring the Ballot Style Form Page

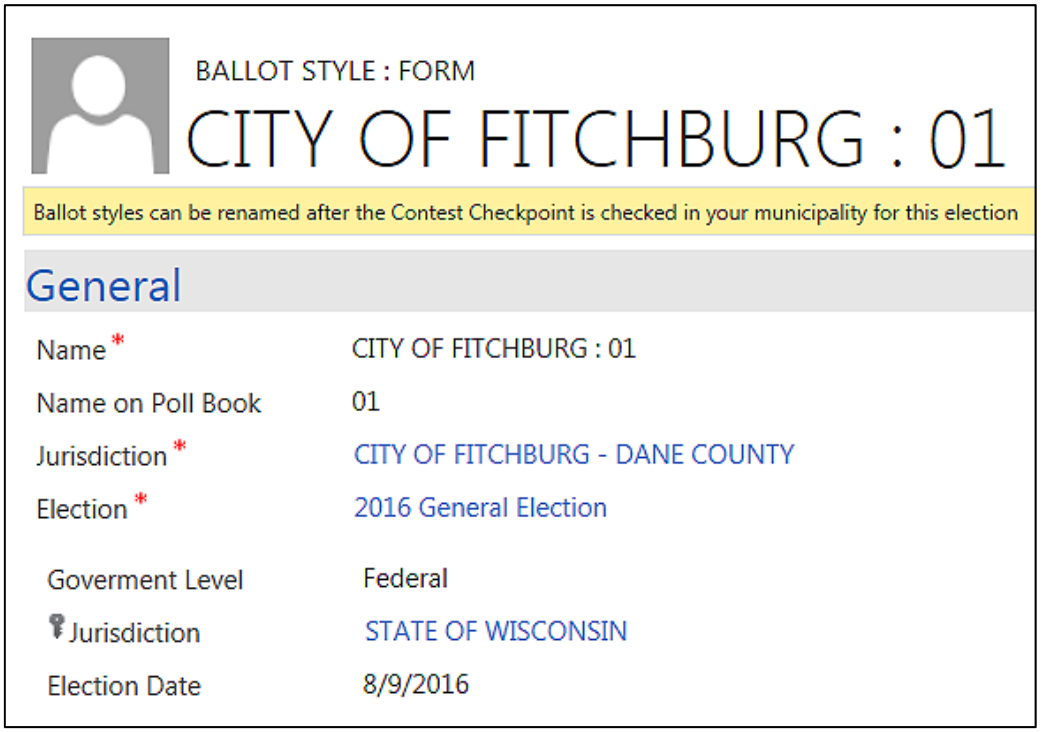
General	Detailed information associated with the ballot style, including the name of the ballot style as it will appear on the poll book
Reporting Units	Reporting units linked to the ballot style
Polling Place Locations	List of the polling places that are linked to the ballot style
Contests	Contests that will appear on the ballot style
District Combos	District combinations linked to the ballot style

Review Ballot Styles

1. Click the Elections tile
2. Click the Election Name to open to Election Information page
3. Click the Ballot Styles tab to expand the view
4. Click the name of the Ballot Style in the grid to open the Ballot Style Form

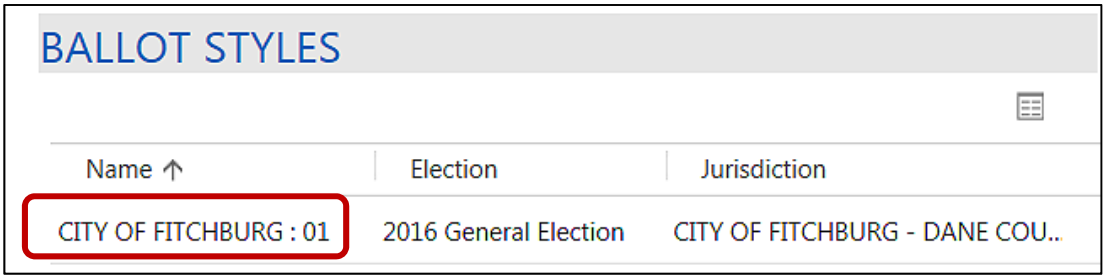


5. Review the information associated with the ballot style to verify it is correct
   Note: The Contest Complete checkpoint for this election needs to be marked before the Ballot Style can be renamed



Rename Ballot Styles

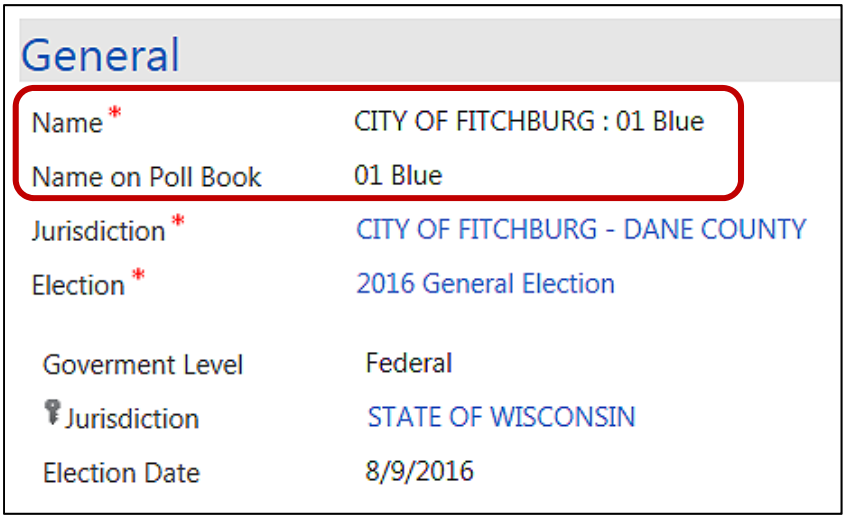
1. Click the Elections tile
2. Click the Election Name to open to Election Information page
3. Click the Ballot Styles tab to expand the view
4. Click the Name of the Ballot Style to open the *Ballot Style* form



5. Enter the new Ballot Style name in the *Name* field
6. Enter the new Ballot Style Name that will appear on the Poll Book in the *Name on Poll Book* field

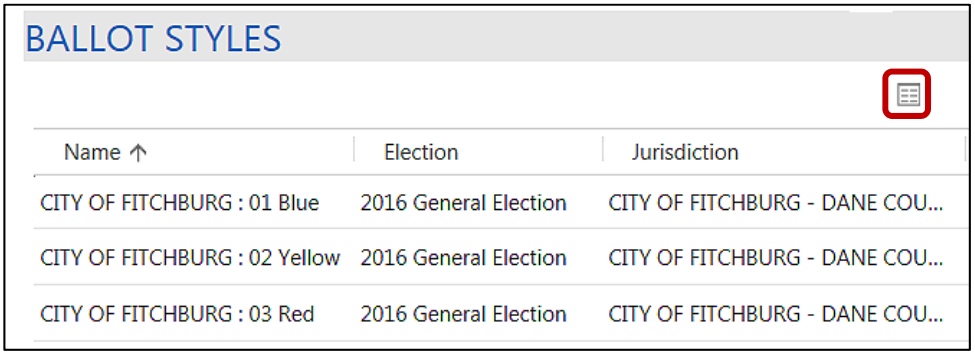
> *Only the text in the* ***Name on Poll Book*** *field will appear on the poll book!*

7. Click Save to save and review the updated Ballot Style Name and Ballot Style Name on Poll Book or Save & Close to save and return to the Election Information page

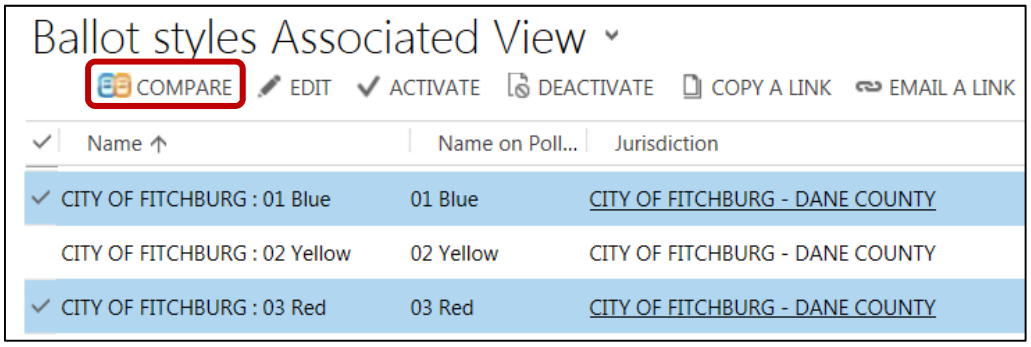


Compare Multiple Ballot Styles

1. Click the Elections tile
2. Click the Election Name to open to Election Information page
3. Click the Ballot Styles tab to expand the view
4. Click the Expand button below the Ballot Styles tab to see the associated views



5. In the column, check the ballot styles you want to compare then click Compare



6. In the Report Viewer Compare Ballot Styles window, click the a Ballot Styles and review individual ballot style information

   Note: the colored cells represent discrepancies in the ballot style comparison

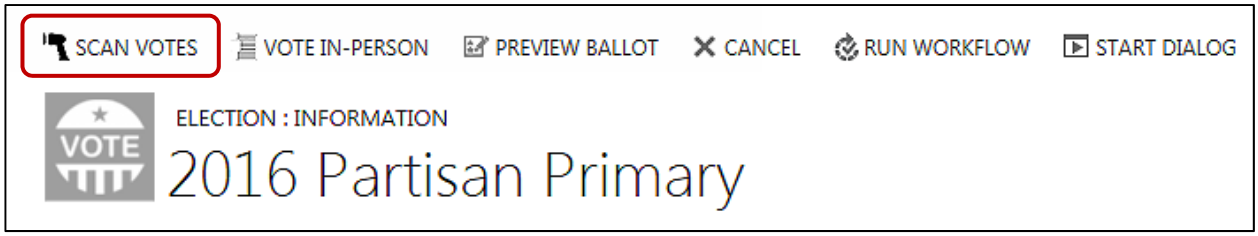
	Ballot Styles	
Contest	CITY OF FITCHBURG : 01 Blue	CITY OF FITCHBURG : 03 Red
PRESIDENT/VICE PRESIDENT OF THE UNITED STATES	X	X
UNITED STATES SENATOR	X	X
REPRESENTATIVE IN CONGRESS DISTRICT 2	X	X
STATE SENATOR DISTRICT 16	X	-
STATE SENATOR DISTRICT 26	-	X
REPRESENTATIVE TO THE ASSEMBLY DISTRICT 47	X	-
REPRESENTATIVE TO THE ASSEMBLY DISTRICT 77	-	X
DANE COUNTY DISTRICT ATTORNEY	X	X
Dane County Clerk	X	X
Dane County Treasurer	X	X
Dane County Register of Deeds	X	X

6.1 Voter Participation

Wisconsin state law requires that election officials record voter participation no later than 30 days after an election. There are two methods of recording voter participation in WisVote; 1) automatically recording voter participation by scanning the barcodes associated with voter records on the poll book, or 2) manually selecting voter participation using the poll book grid. Poll books are located in the elections tile and are accessed by opening the election and expanding the poll books tab. Voter participation is recorded by scan from the election information page and recorded by using the poll book grid from the poll book information page.

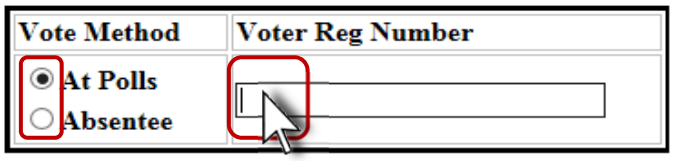
Record Voter Participation by Scan

1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. Click the Scan Votes button to open the Process Voter Participation window

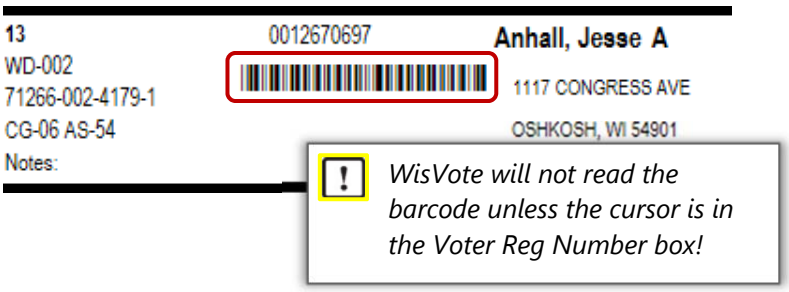


4. Select *At Polls* or *Absentee* as the vote method
   Note: voter participation records for At Polls and Absentee have to be recorded separately

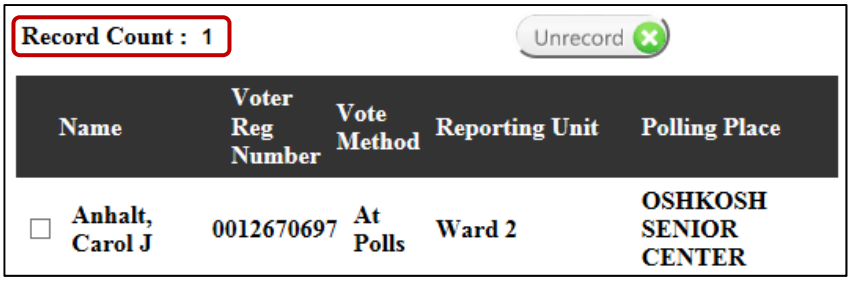
5. Click or tab to place the cursor in the Voter Registration Number box



6. Scan the barcode on the poll book to record participation for the voter

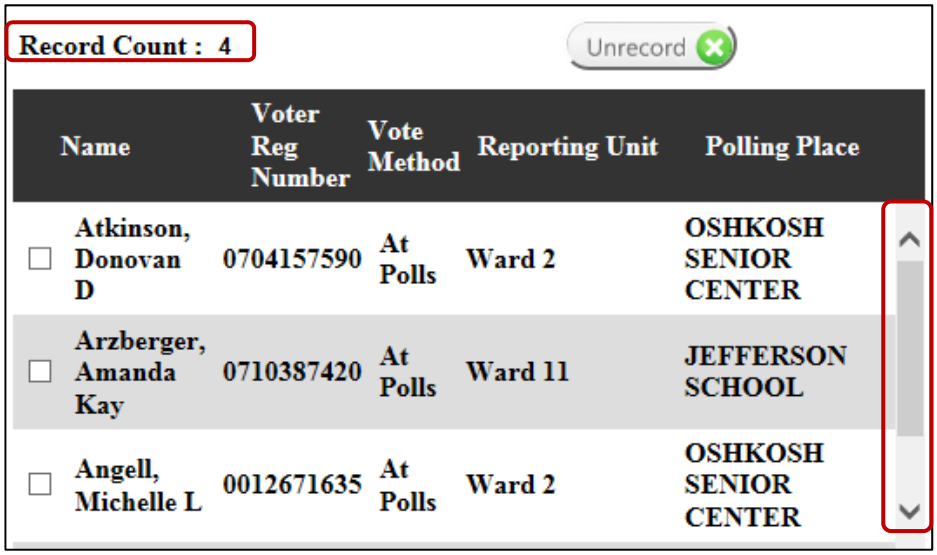


7. The processed voter participation record will display at the bottom of the Process Voter Participation window; WisVote automatically saves the voter participation data after a barcode scan is processed



8. Continue scanning barcodes until you have finished recording voter participation; voter participation does not have to be recorded in one session

   Note: the record count displayed in the Process Voter Participation window will only record participation recorded during that session, total voter participation can be viewed on the Poll Book Information page. The list is in descending order; use the scroll bar to view previous entries



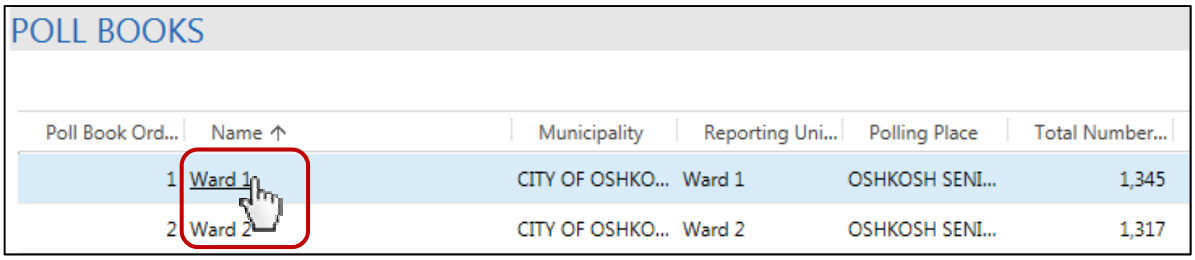
9. To finish recording voter participation, close the Process Voter Participation window

Record Voter Participation from the Poll Book Grid: Multiple Voter Records

For faster recording, it is recommended to record voter participation from the poll book grid by selecting all ten voter records displayed on a poll book page instead of selecting them individually. Selecting the checkbox in the top category field will automatically select the individual checkboxes of all ten records on the page and assign them to the vote method of *At Polls*. A selected checkbox in the poll book grid indicates the voter participated in the election. **To unrecord voter participation, unselect the checkbox.**

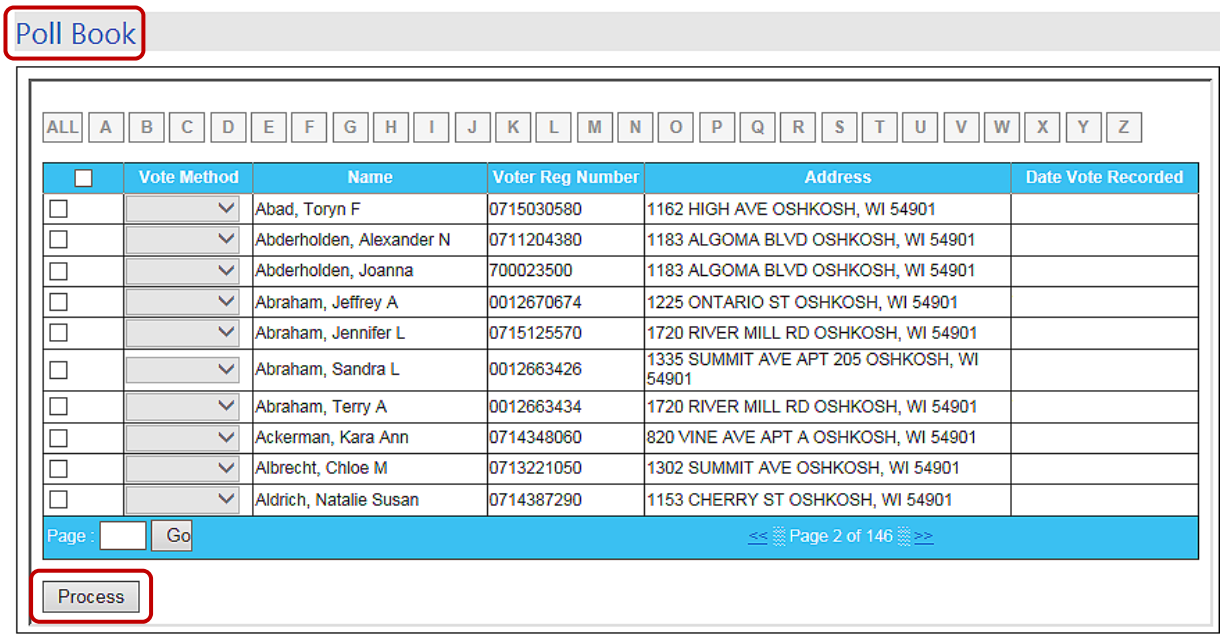
1. Click the Elections tile
2. Click the name of the Election to open the Election Information page
3. Click the Poll Books tab to expand the view

4. Click the name of the poll book to open the Poll Book Information page



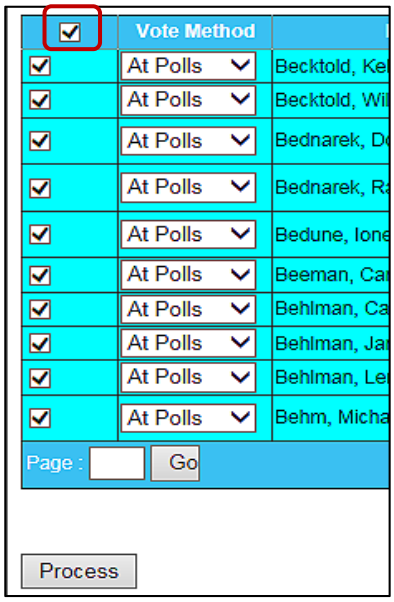
5. Click the Poll Book tab to expand the view and display the poll book grid

Note: each page of the electronic poll book will display ten voter records that correspond with the printed poll book starting with the letter A; enter the page number or click >> to advance

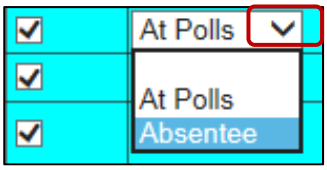


6. To record voter participation beginning at specific letter of the alphabet: 1) arrow through the entire poll book to the letter, or 2) enter the page number which corresponds to the poll book

7. Select the checkbox in the category field to select participation for all ten records on the page and assign them to the vote method of *At Polls*



8. Click the drop-down arrow in the Voter Method field to change the vote method to *Absentee* for the voters who have an absentee indicator on the poll book

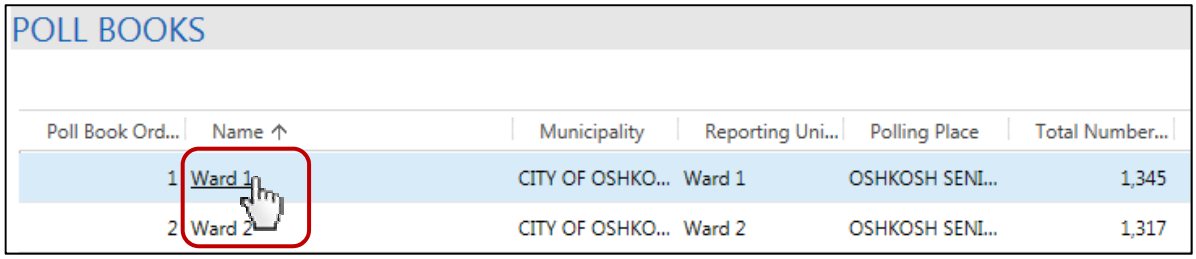


9. Click the checkbox to the left of the voter records to unrecord voter participation for the records of voters who did not participate in the election

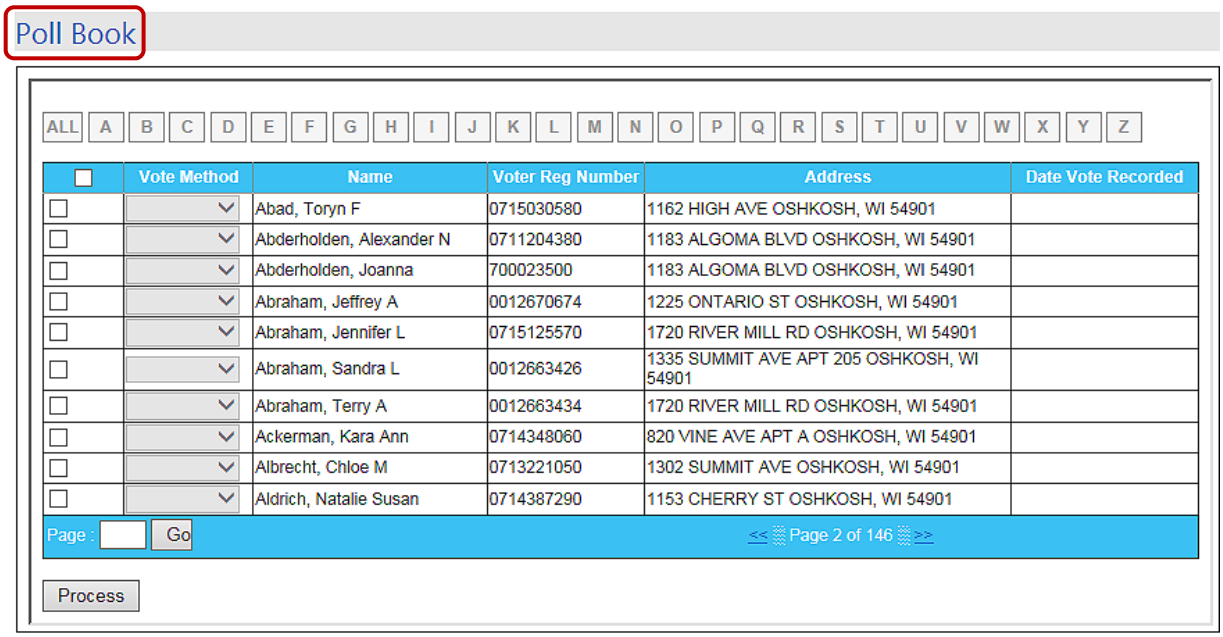
10. Click the Process button to record voter participation for the selected voter records

Record Voter Participation from the Poll Book Grid – Single Voter Record

1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. Click the Poll Books tab to expand the view
4. Click the name of the name of the poll book to open the Poll Book Information page

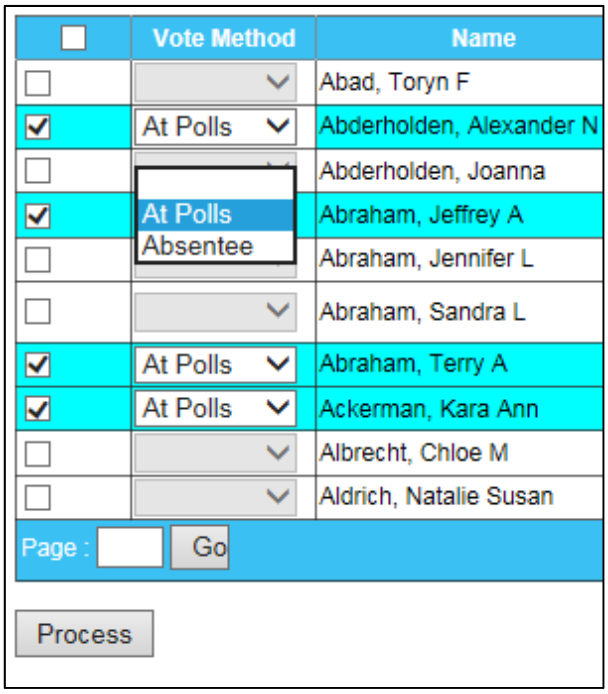


5. Click the Poll Book tab to expand the view and display the poll book grid
   Note: each page of the electronic poll book will display ten voter records that correspond with the printed poll book starting with the letter A; enter the page number or click >> to advance



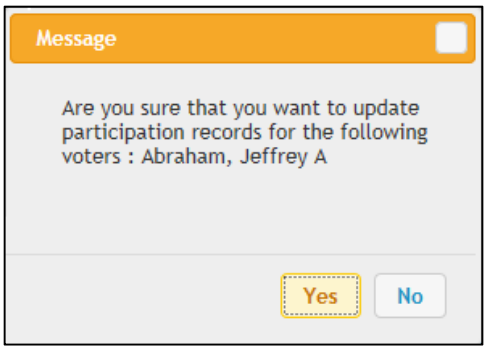
6. To record voter participation beginning at specific letter of the alphabet: 1) arrow through the entire poll book to the letter, or 2) enter the page number which corresponds to the poll book

7. Click the checkbox to the left of the voter record to record voter participation; the vote method will default to *At Polls*
8. Click the drop-down arrow in the Voter Method field to change the vote method to *Absentee*
9. Repeat steps 6 and 7 until voter participation for the poll book page has been recorded
10. Click the Process button to record voter participation for the selected voter records



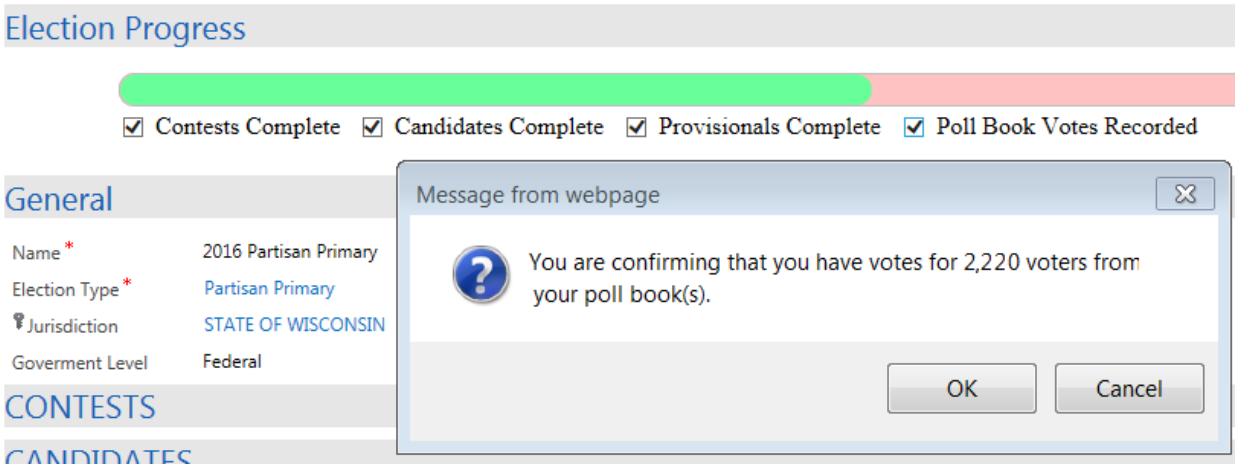
Unrecord Voter Participation

1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. Click the Poll Books tab to expand the view
4. Click the name of the poll book to open the Poll Book Information page
5. Click the Poll Book tab to expand the view and display the poll book
6. Click the checkbox to the left of the voter records to unrecord voter participation
7. A confirmation message will appear after unselecting the checkbox, click yes to confirm the change
8. To edit the voter method, click the drop-down arrow in the Voter Method field and change the method to *At Polls* or *Absentee*
9. Click the process button to finish editing the voter participation records



Poll Book Votes Recorded Checkpoint

Select the Poll Book Votes Recorded Checkpoint after all of your jurisdiction's voter participation has been recorded. A user can uncheck the Poll Book Votes Recorded Checkpoint to add or edit voter participation.

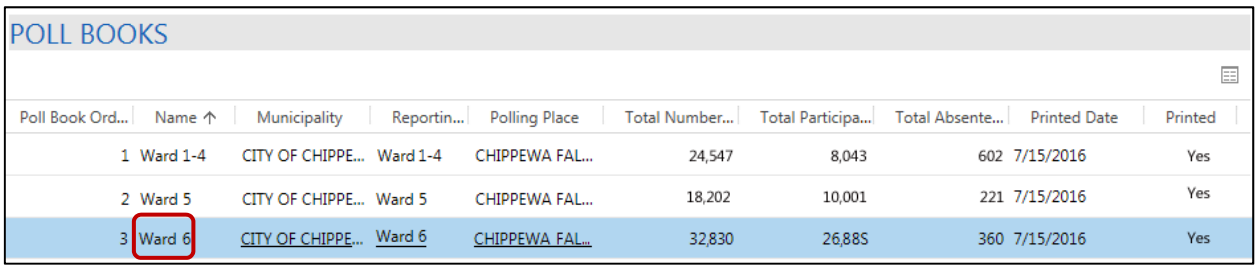


6.2 Election Day Registration

In Wisconsin, electors can register to vote at the polling place location on Election Day. After the election, state law requires that election officials enter Election Day registrations no later than 30 days after a primary, spring or special election and 45 days after a general election.

Enter an Election Day Registration

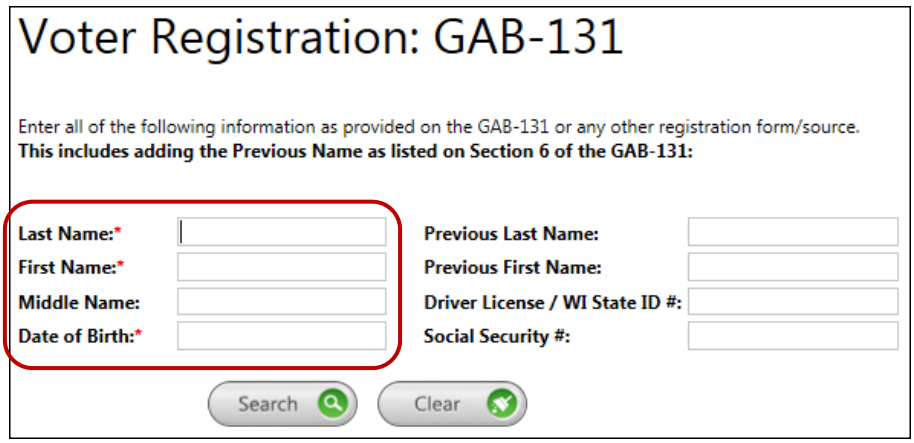
1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. Click the Poll Books tab to expand the view
4. Click the name of the poll book to open the Poll Book Information page



Poll Book Ord...	Name	Municipality	Reportin...	Polling Place	Total Number...	Total Participa...	Total Absente...	Printed Date	Printed
1	Ward 1-4	CITY OF CHIPPE...	Ward 1-4	CHIPPEWA FAL...	24,547	8,043	602	7/15/2016	Yes
2	Ward 5	CITY OF CHIPPE...	Ward 5	CHIPPEWA FAL...	18,202	10,001	221	7/15/2016	Yes
3	Ward 6	CITY OF CHIPPE...	Ward 6	CHIPPEWA FAL...	32,830	26,88S	360	7/15/2016	Yes

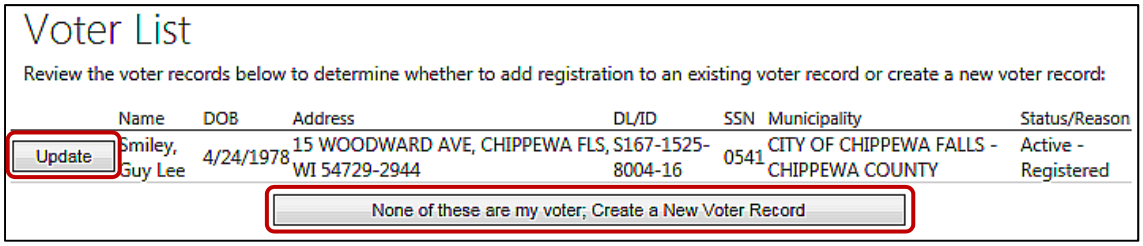
5. Click the EDR button to open the New Voter Registration window
   (Problems with the EDR button? See FAQs at the end of this section)

6. Enter the First Name, Last Name and Date of Birth of the voter and any optional information in the Voter Registration Search window, then click search



7. If a match is not found, click the ...*New Voter Record* message bar to create a new voter record

8. If a match is found, the voter record will appear in the Voter List; verify the information to determine if the voter is already registered; click the message bar to create a new voter record or click the Update button to update the voter record



Note: a Duplicate Election Participation warning displays if the elector has already registered a vote

9. A new EDR voter record will open; enter the driver license or state ID number in the DL/ID field

10. Enter the driver license or state ID expiration date in the Expiration Date field (MM/DD/YYYY)

11. Enter the last 4 digits of the social security number in the SSN field (if available)

12. If neither a DL/ID number or SSN were provided, click the Neither DL/ID nor SSN checkbox

13. Enter the optional Phone and Email fields

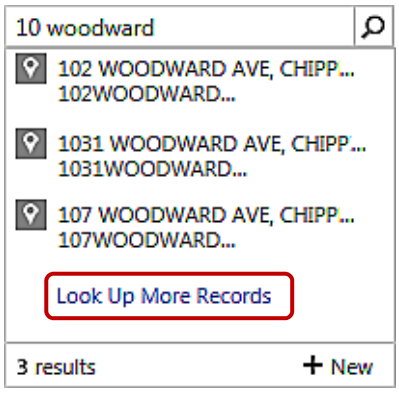
14. Enter the applicants street number and name in the Home Address field, then press enter or click the magnifying class to display the search results
Note: exclude or abbreviate the street type (St, Ave, Ct, Rd, Cir) to produce results

15. Click to select the address from the drop-down list of address search results

16. If the address is not found in the drop-down list of search results, click Look Up More Records to display more records or refine the search parameter

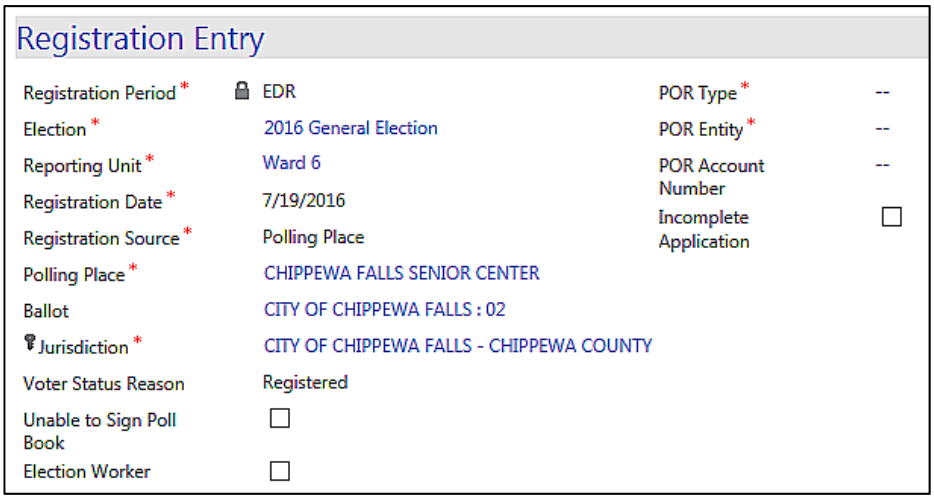
17. If a matching address is still not found, and a new address must be entered, click the New button in the Look Up Record window to add a new address

Note: "Address Already Exists in Database" error may display after attempting to add a new address (see Address errors)



18. Click the different mailing address checkbox if a different mailing address was provided, then enter the mailing address

The Voter Type, Registration Period, Election, Reporting Unit, Registration Date, Registration Source, Polling Place, Ballot and Jurisdiction fields will be automatically populated when a new voter registration is created using the EDR button



19. Click the POR Type field, and select the type of proof of residence submitted with the election day voter registration application from the drop-down list

- Affidavit for Homeless Electors
- Bank Statement
- College Student ID with Fee Receipt (dated within last nine months)
- Care Facility Document
- Driver License or ID Card
- Employment ID Card (not business card)
- Government ID Card
- Other Document Issued by a Unit of Government
- Paycheck
- Real Estate Tax Bill (current year or the year preceding)
- Residential Lease
- Utility Bill (within 90 days of the date of registration)

Note: a corroborating witness is no longer an acceptable form of POR. The option remains for historical purposes for the past voter records associated with that POR type.

20. Click the POR Entity field, and enter the Name of the Entity that issued the proof of residence

21. If there is a unique number associated with the proof of residence document, click the POR Account field and enter the last few digits of the number

    - 7 or more digits in length, record the last 4 digits
    - 6 or fewer digits in length, record the last 2 digits

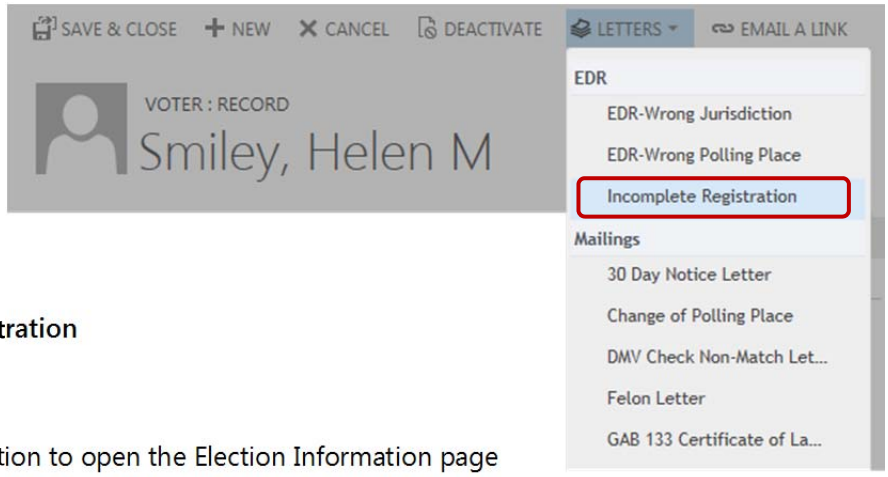
22. If the voter registration form is missing information check the Incomplete Application box (see Incomplete Application)

23. Click Save & Close to save the election day registration record and close the window

Incomplete Application

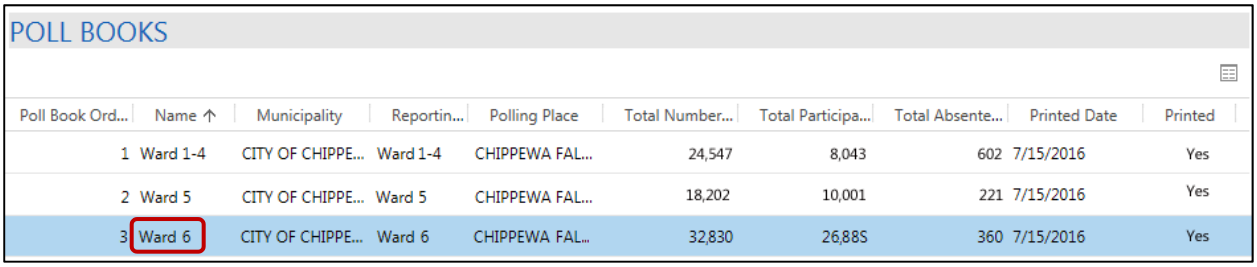
Checking Incomplete Application will process the EDR, record a vote, and then inactivate the Voter Record. A letter should be sent notifying the elector of these actions.

- To access the letter, go to the voter record of the affected person
- Select the Letters button and click Incomplete Registration
- This letter can be printed from a PDF or a Word document. Click Export Pdf or Export Word



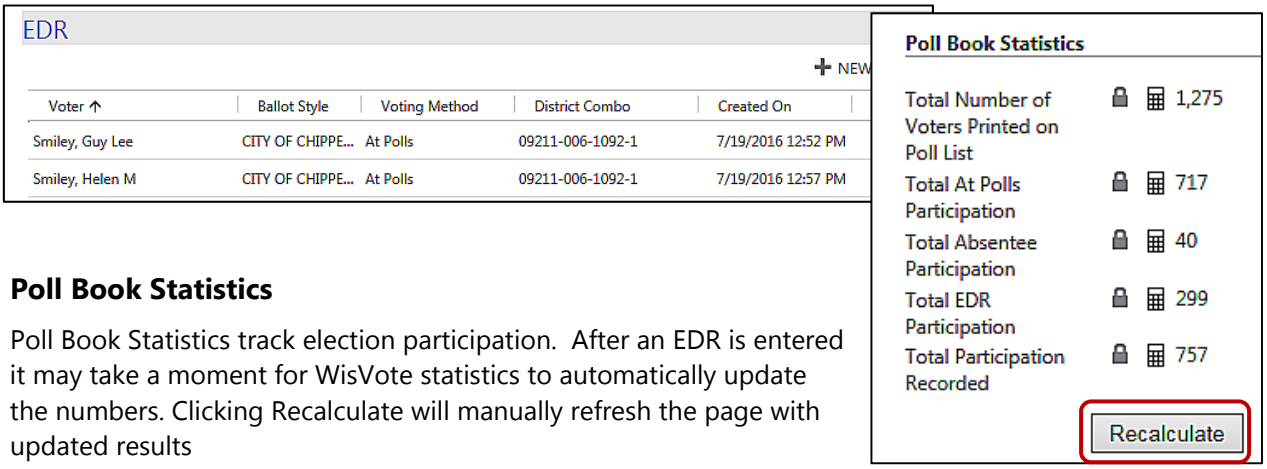
Review an Election Day Registration

1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. Click the Poll Books tab to expand the view
4. Click the name of the poll book to open the Poll Book Information page



Poll Book Ord...	Name	Municipality	Reportin...	Polling Place	Total Number...	Total Participa...	Total Absente...	Printed Date	Printed
1	Ward 1-4	CITY OF CHIPPE...	Ward 1-4	CHIPPEWA FAL...	24,547	8,043	602	7/15/2016	Yes
2	Ward 5	CITY OF CHIPPE...	Ward 5	CHIPPEWA FAL...	18,202	10,001	221	7/15/2016	Yes
3	Ward 6	CITY OF CHIPPE...	Ward 6	CHIPPEWA FAL...	32,830	26,885	360	7/15/2016	Yes

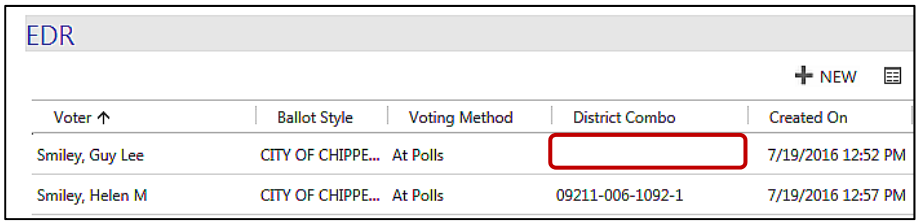
5. Click the EDR tab to expand the view and display the processed election day registrations grid



Poll Book Statistics

6. Poll Book Statistics track election participation. After an EDR is entered it may take a moment for WisVote statistics to automatically update the numbers. Clicking Recalculate will manually refresh the page with updated results

7. Review the grid. If the district combination is missing:
   - the elector voted at the wrong polling place; send a letter
   - the elector voted in the wrong jurisdiction; send a letter
   - the address may not have a district combination; fix address



8. Click the name of the voter to open the voter record and investigate. Review the voter's district combination (DC)

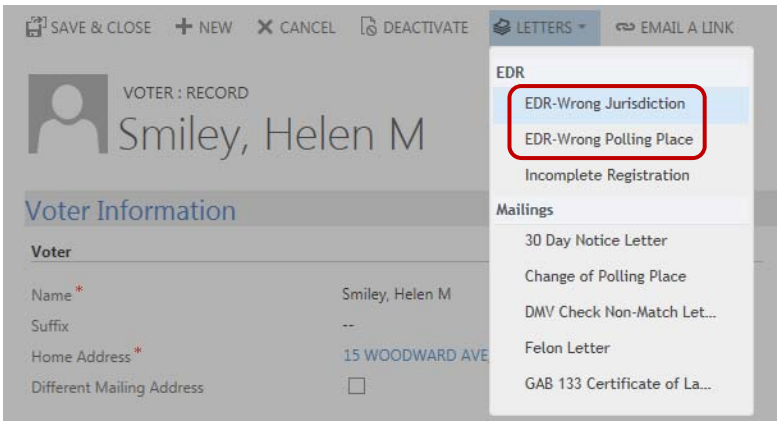
For example a DC = 09211-**001**-1092-1 means the elector should have voted in the polling place with the reporting unit of **1**. If the polling place included Wards 1-6, then the district combination would have displayed in the EDR section.

An alternative example a DC = 41265-006-4018-1 is a Milwaukee County jurisdiction. This district combination is outside of the jurisdiction of Chippewa County.

9. To send a letter to the elector, click Letters and choose the appropriate EDR letter

10. This letter can be printed from a PDF or a Word document. Click Export Pdf or Export Word button

11. Contact the Elections Helpdesk to unrecord the incorrect voter registration and election participation record



12. (If applicable) Click Save & Close if any updates to the record are made, or Cancel to return to the Poll Book Information page

EDR Complete Checkpoint

Select the EDR Complete Checkpoint after all of your jurisdiction's election day registrations have been recorded. Once selected, a confirmation window with the number of election day registrations that have been entered will appear. A user can uncheck the EDR Complete Checkpoint to add or edit an Election Day registration.

FAQ: Frequently Asked Questions

EDR - Button Unresponsive

If a voter registration form does not open when you click the EDR Button, adjust your internet browser privacy settings.

Internet Explorer

1. Click the Tools button then Internet options
2. Click the Privacy tab
3. Click Sites
4. Enter: https://wisvote.wi.gov/webresources in the Address of website field
5. Click Allow, then OK

Chrome

1. Click the Menu button, then Settings
2. Click Show Advanced Settings (at the bottom of the page)
3. Scroll down to Privacy, click Content Settings
4. A window opens, scroll down to Pop-ups
5. Click Manage Exceptions... button
6. Add in the Hostname field: https://[*.]wisvote.wi.gov:443 and in the behavior set to Allow
7. Click Done, OK then Done

EDR - Incorrectly Entered as a Regular Voter Registration

If an EDR was entered using the Voter Registration tile, voter participation cannot be recorded for the voter record. Voter participation can only be recorded if the EDR is entered within the election and correct reporting unit.

1. Re-enter the EDR within the election and correct reporting unit
2. Call the Elections Helpdesk to remove the incorrect voter registration record

6.3 Provisional Ballot Tracking

In WisVote provisional ballot information is recorded and tracked using the Provisional Ballots tab. On Election Day, election inspectors record information on the Provisional Ballot Reporting form when voters are issued a provisional ballot. If a jurisdiction issues provisional ballots, the information on the Provisional Ballot Reporting form must be entered into WisVote on election night. If a jurisdiction does not issue any provisional ballots on Election Day, no action is required on election night.

Electors who vote a provisional ballot can check the status of their provisional ballot on the MyVote Wisconsin website.

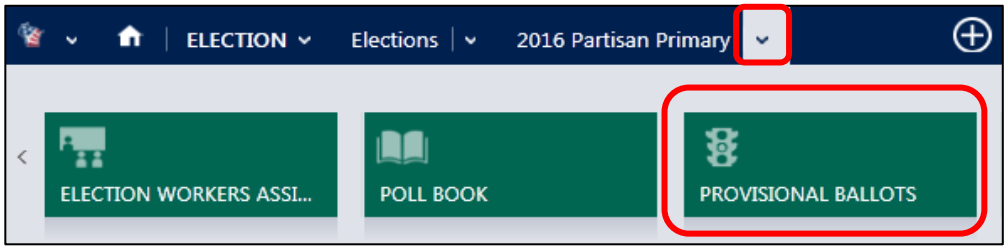
Issue a Provisional Ballot

In Wisconsin, provisional voting is used for three Election Day situations:

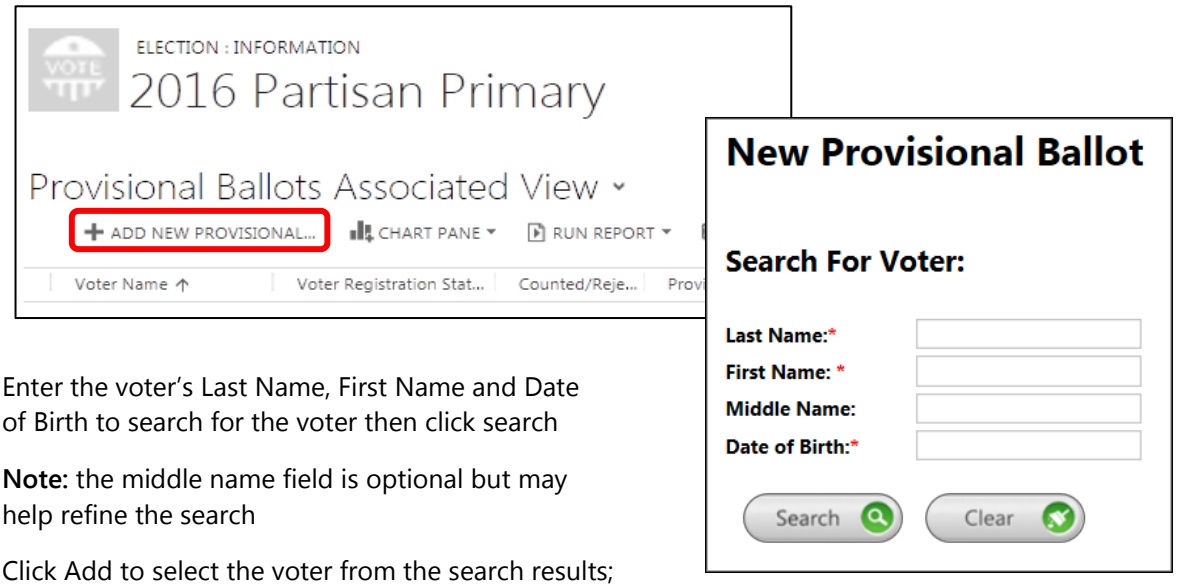
1. **First time voters who registered by mail prior to April 4, 2014 and failed to provide the required proof of residence**
   - The poll list will contain the notation "POR Required" to identify the voters who registered by mail and who must show proof of residence before being allowed to vote
   - If an individual fails to provide the required proof of residence he or she may vote provisionally
2. **Voters who are unable or unwilling to provide their Wisconsin driver license or identification card number on their voter registration application**
   - Individuals who have a Wisconsin driver license may not use the last four digits of their Social Security number to complete the voter registration application
   - A provisional ballot is not issued if the required proof of residence documentation is also missing
3. **Voters who are unable or unwilling to present an acceptable proof of identification**
   - If the proof of identification provided is questionable, the ballot is challenged; a provisional ballot is not issued

Enter a Provisional Ballot Record

1. Click the Elections tile
2. Click the name of the election to open the Election Information page
3. At the top of the Election Information page, click the drop-down arrow to the right of the name of the election, select the Provisional Ballots button in the navigation bar



4. Click the +Add New Provisional Ballots button at the top of the Provisional Ballots view page to enter a new provisional ballot record



5. Enter the voter's Last Name, First Name and Date of Birth to search for the voter then click search

   Note: the middle name field is optional but may help refine the search

6. Click Add to select the voter from the search results; if the voter record is not found, select "None of these are my voter, create a new provisional ballot"

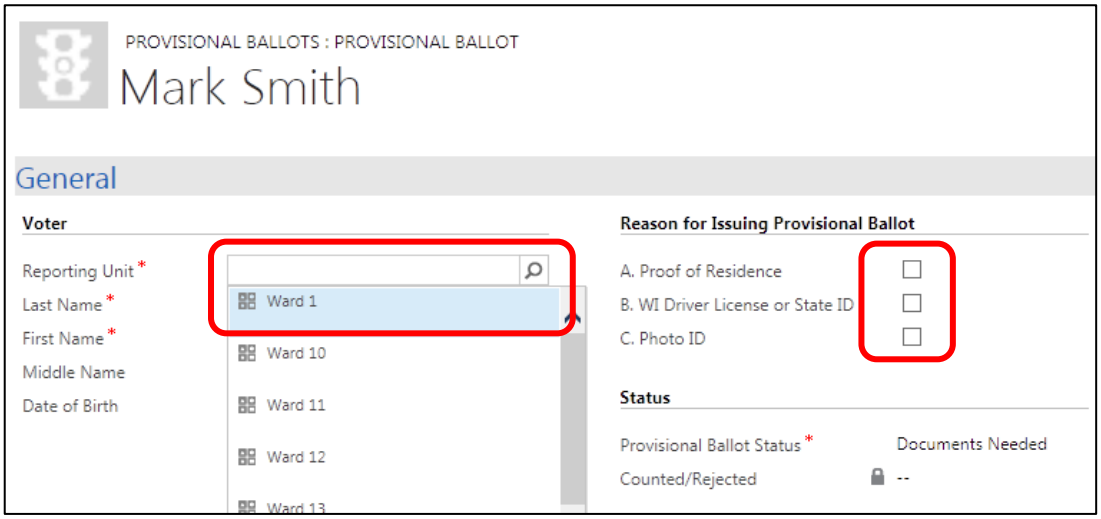
7. On the Provisional Ballot form, click the magnifying glass and select the reporting unit from the drop-down list

8. Select the reason the provisional ballot was issued, multiple selections may be chosen

   - **Proof of Residence Required**
   - **WI Driver License or State ID Required**
   - **Photo ID**

9. The Provisional Ballot Status field will default to Documents Needed

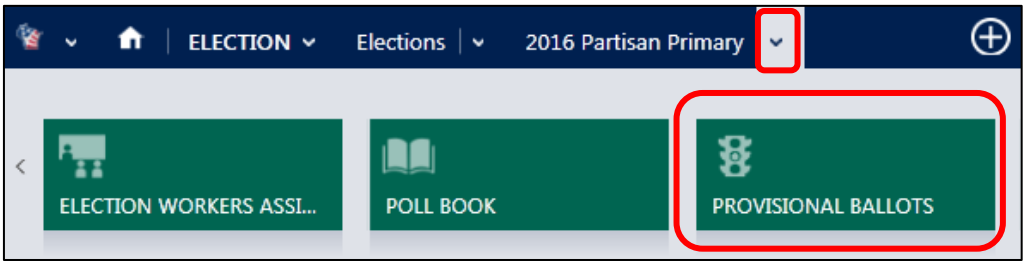
10. The Counted/Rejected field will be locked until the Provisional Ballot Status is changed to either Deadline Expired or Complete



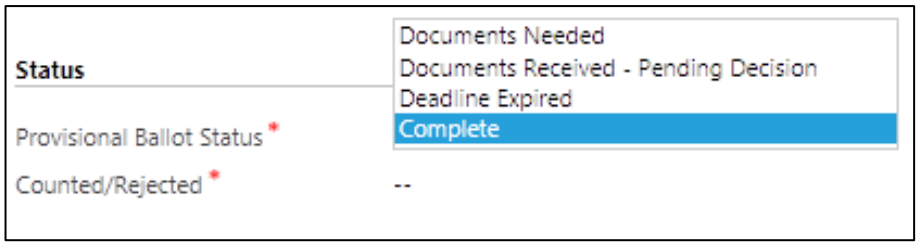
11. Click Save & Close to save the entry and return to the New Provisional Ballot search page

Update a Provisional Ballot Record

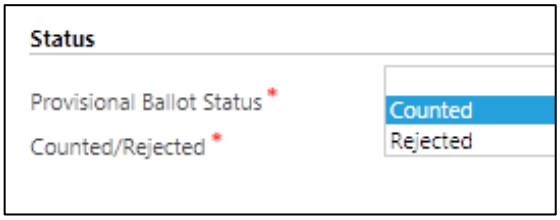
1. Click the Elections tile
2. On the Elections View page, click the name of the election to open the Election Information page
3. At the top of the Election Information page, click the drop-down arrow to the right of the name of the election
4. Click the Provisional Ballots tile in the navigation ribbon to open the Provisional Ballots View page



5. Click the name of the voter in the Provisional Ballot Associated View grid to open the Provisional Ballot form
6. If the missing information (Photo ID, Proof of Residence, or Driver License number) was submitted from the voter, update the Provisional Ballot Status field to, "Documents Received – Pending Decision"
7. After the Board of Canvassers reconvenes, update the Provisional Ballot Status field to "Complete"



8. If the missing information was not submitted from the voter by the deadline (Friday at 4:00 p.m.), update the Provisional Ballot Status field to, "Deadline Expired"
9. When the Provisional Ballot Status field is updated to Complete or Deadline Expired the Counted/Rejected field will unlock
10. Select "Counted" if the ballot was counted, or "Rejected" if the ballot was rejected



Provisionals Complete Checkpoint

Check the Provisionals Complete Checkpoint after all of the provisional ballots have been entered into WisVote on Election Night. If a jurisdiction issued zero provisional ballots on Election Day, check the Provisionals Complete Checkpoint by 4:00 p.m the Friday after the election to record that zero provisional ballots were issued. Once the checkpoint is selected, a user can uncheck the checkpoint to add or edit provisional ballots.

7.1 Introduction to Addresses and Districts

District boundaries in WisVote are managed by the Wisconsin Election Committee. but local county and municipal land information offices provide the boundary data. Using tools in WisVote, clerks manage individual voter addresses and their corresponding district combinations (DCs).

Mapping tools manage the district boundaries in WisVote. Every district has a map to show the territory contained within that district. The location of an address in relation to those boundaries can be viewed within every address record. The relationship between the location of that address and the corresponding boundaries determines the ballot that a voter will receive. Accurate address locations and district boundaries are essential to ensure voters receive the correct ballot.

Address Management Tiles

- **Addresses**
  This tile contains all addresses within a particular municipality (whether or not there is a voter associated to it) and whether or not it is active or inactive. Specific Views can be created that make viewing particular addresses much simpler (see Creating Views Section…). Addresses are also where to go to create a new address or edit an existing address. Address data quality issues may also be corrected here (see Data Quality & Reporting Issues section 4.3)

- **District Combinations**
  This tile contains all district combinations (DCs) within a particular municipality. Selecting a particular DC code will list all of the districts associated to that district combination. District combos and their associated districts determine the geography of a particular ballot style.

- **Jurisdictions**
  This tile contains a list of all the Jurisdictions within the State of Wisconsin; this consists of counties and municipalities.

- **Districts**
  This tile contains a listing of all the districts in the State of Wisconsin. There are several views for different district types as well as a more useful view called My Districts that lists all the districts within the given county or municipality that a clerk is logged into.

- **District Types**
  This tile lists all the 19 different district types within WisVote.

Key Terms

- **Address Pin**
  A cone-shaped pin that represents the location of a voter address in WisVote
- **Boundary Exception**
  Any address pin that is within 50 meters of a district combination boundary
- **DC**
  Abbreviation for a district combination; DCs are created using the boundaries of wards overlaid with school districts creating the smallest possible geographic area that can be on a ballot
- **Geocode**
  Description used to determine the location of an address pin
- **Geocode Exception**
  Address that the system is not certain of the geocoded location; represented by a red address pin
- **Geocode Warning**
  Address with a margin of error of the geocode location; represented by an orange address pin

Mapping and Address Pins

Pins are used to represent a specific address on the map. The colors and symbols of the pins mean different things in WisVote. If multiple voters reside at one address all of those voters are represented by a single pin within the District Combo map screen. For addresses with multiple units, each unit will have its own pin. A correction of a single pin will correct all the voters at that particular address.

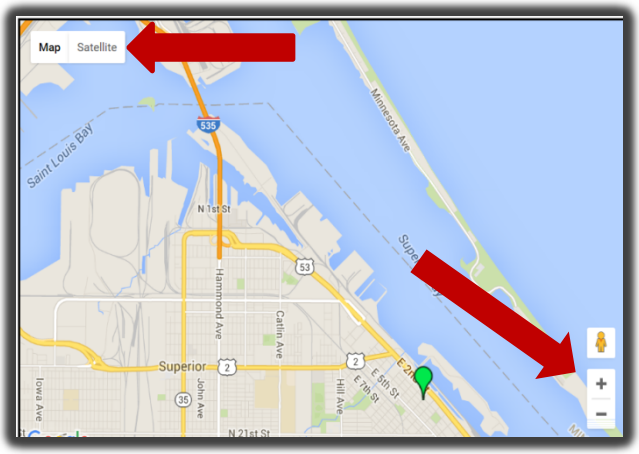
There are several different ways to view district maps and address locations in WisVote. The two most common ways are through the particular district combination record or through a specific address record.

Navigating Mapping Features

There are a number of useful features on the maps:

On the lower right-side of the map there is a plus (+) and minus (-) to adjust the view. Some pins may appear outside an initial map view. Zoom out when necessary to view all the affected pins.

In the upper-left corner of the map display there are two buttons, 1) Map and 2) Satellite. Selecting the Satellite button will give the map a satellite overlay. While the satellite overlay can be useful for placing pins directly on homes, it is recommended to only use the satellite overlay when the map is tightly zoomed.

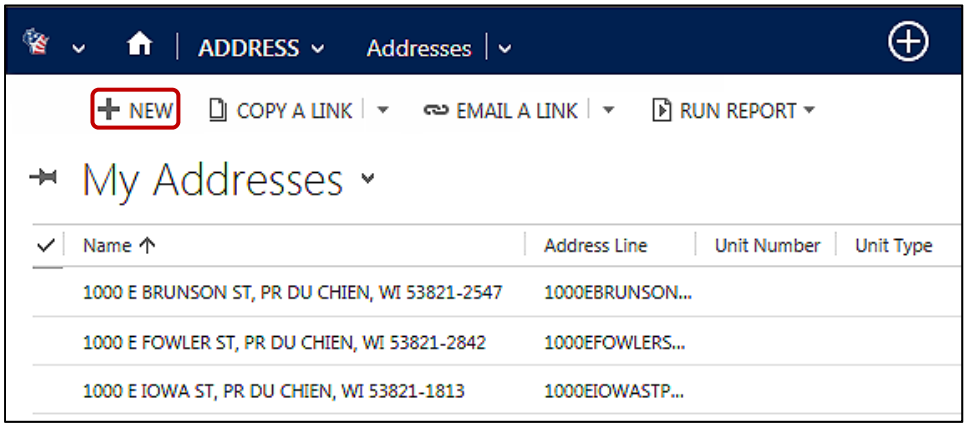


7.2 Addresses

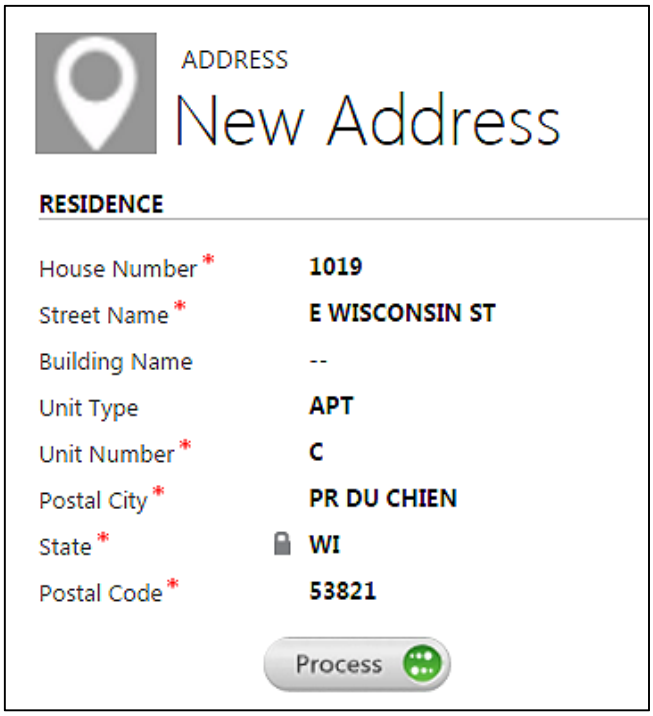
In WisVote, a user can enter a new address into the system, prior to receiving a voter registration form. For example, if a new subdivision is being developed and the lots have been surveyed and the addresses assigned, the addresses for the new subdivision can be entered into WisVote before a voter registration form with one of the new addresses is received.

Add a New Address

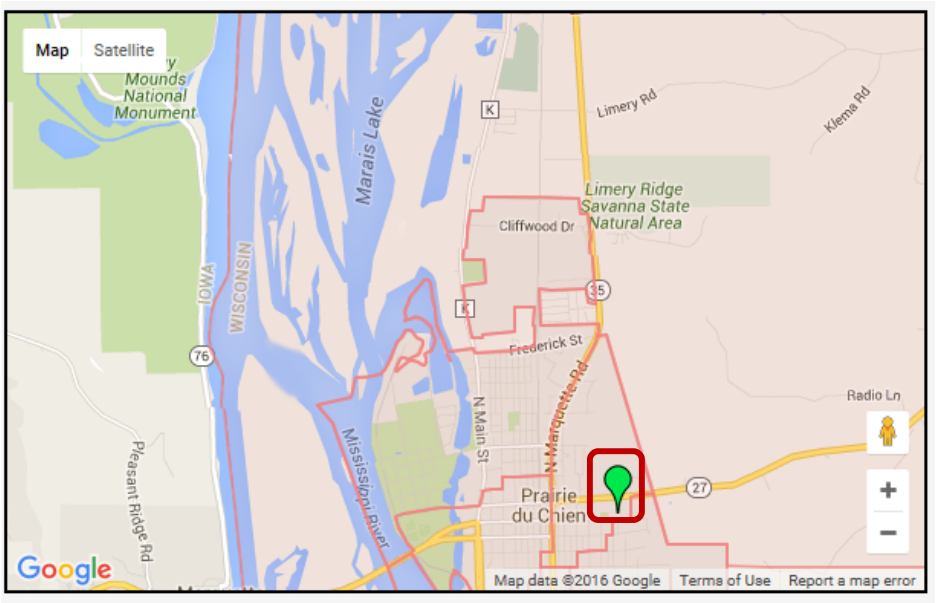
1. Click the Addresses tile to open the *Address* view page
2. Click the +New button to open the *New Address* form



3. Enter the House Number, Street Name, Unit Type, Unit Number, Postal City, and Postal Code, click Process
   Note: The District Combo field and map will populate after clicking Process



4. Verify the address pin is in the correct location; if the address pin is not in the correct location, click on the pin and move it to the correct location

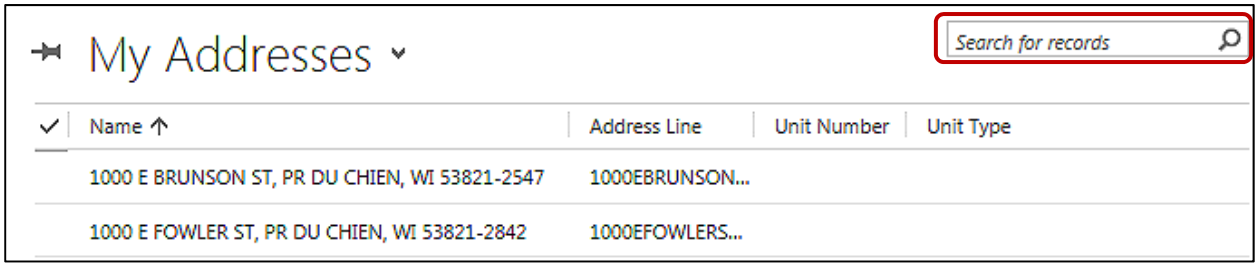


5. Click Save, to save and review the address information or Save & Close to save the new address and return to the *Address* view page
   Note: The new address will now appear in the *My Addresses* view

Search for, and Edit an Address

1. Click the Address tile to open the *Address* view page
2. To search for an existing address, enter the address in the search bar

   Note: exclude or abbreviate the street type (St, Ave, Ct, Rd, Cir) to produce results



   When searching for addresses with a large number of apartments or units, or an address combination that would produce a high number of results, enter the address without the directional (802 5th). For example, to search for 1234 N Park St, enter: 1234 Park St. For all searches omit the unit type, for 3400 N Maryland Ave Apt S1720, enter 3400 Maryland Ave S1720. Do not use quotations. Click the name of the address in the search results grid to open the address record

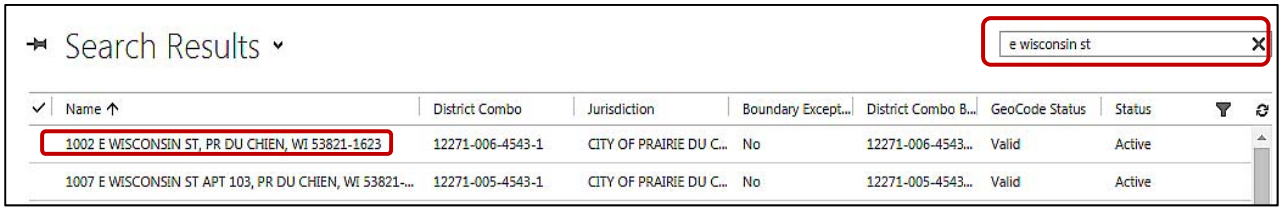
3. Review and update the address information; click Save to save and review the updated information, or Save & Close to save and return to the *Address* view page

Move the Address Pin to Edit an Address

1. Click the Addresses tile

2. Locate an existing address record in the *My Addresses* view, or enter the address into the search bar to search for an existing address

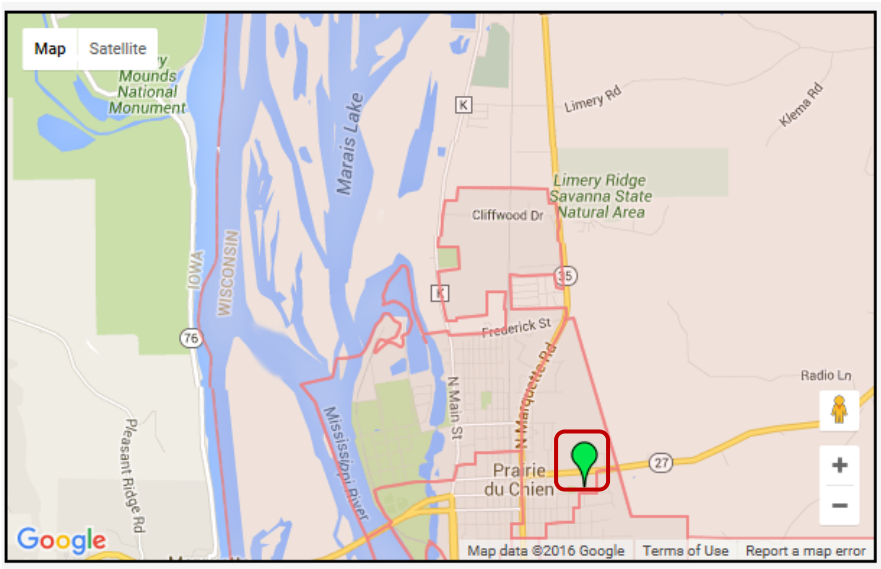
3. Click the name of the address in the addresses grid to open the address record



4. Use the address map to zoom in on the address pin
   Note: You can use the plus (+) sign in the lower-right corner of the map to zoom in and the minus (–) sign to zoom out. You can click and drag within the map to change the area of the map display

5. Left-click and hold-down on the address pin; move the pin in the map to change the location of the address pin
   Note: count parcel data available online to determine the correct location of a particular address

6. Place the pin in the correct location, a black hat will appear on the top of the address pin

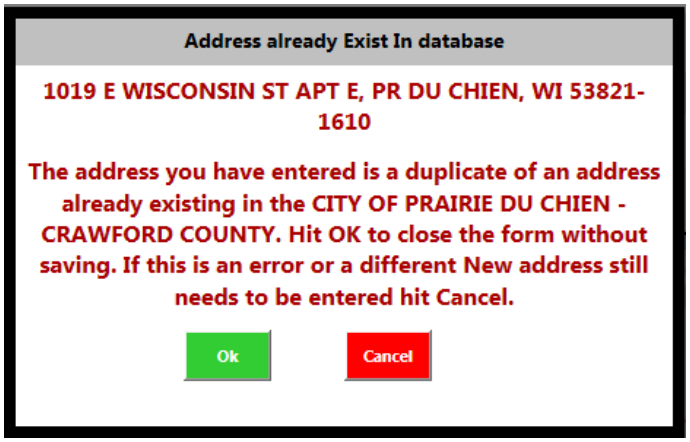


7. Click Save, to save the record or Save & Close to save the record and return to the *Address* view page

Address Already Exists in Database

When entering an address for a voter sometimes an error message will state the address already exists in the database. First verify the address is entered correctly. If not, choose cancel and edit the address making it no longer a duplicate entry.

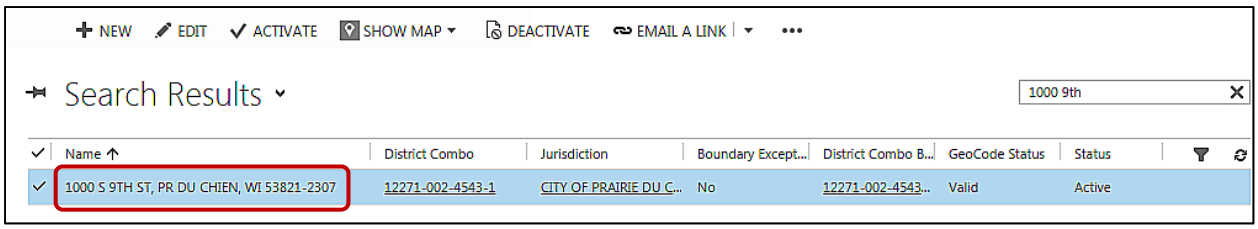
If the address is entered correctly the error may exist for another reason. This is usually because while the address exists, it is Inactive. Those addresses from SVRS that did not have district combination (DC) numbers or where pin locations were never validated were migrated to WisVote as inactive.



Inactive Address Resolution

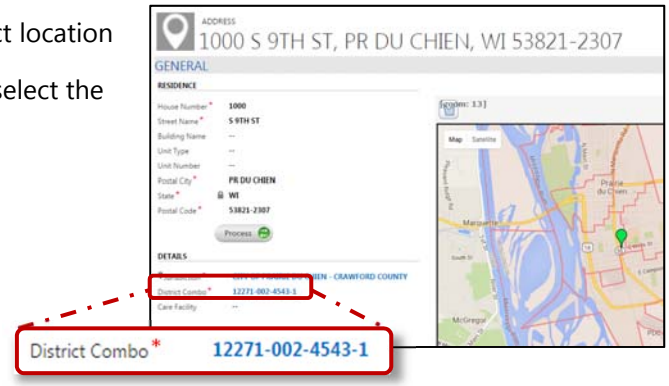
Verify the address has a DC and both it and its pin location are correct, and then Activate the address.

1. Click the Addresses tile
2. Enter the address in the Search for records field
3. Click on the address name to open the record



4. Review the address pin location and district combo
   - If the pin is incorrect, move the pin to the correct location
   - If the district combination incorrect or missing, select the correct DC
5. Select the Activate button.
6. Click Save & Close

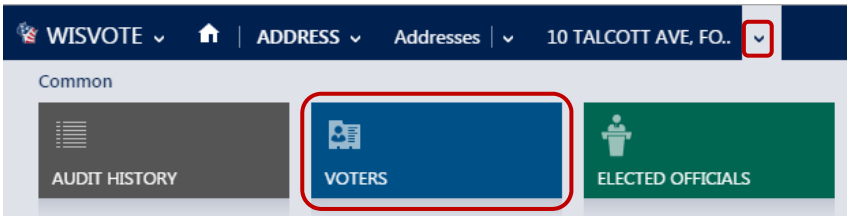
This address will now appear in the list when adding voters to this address.



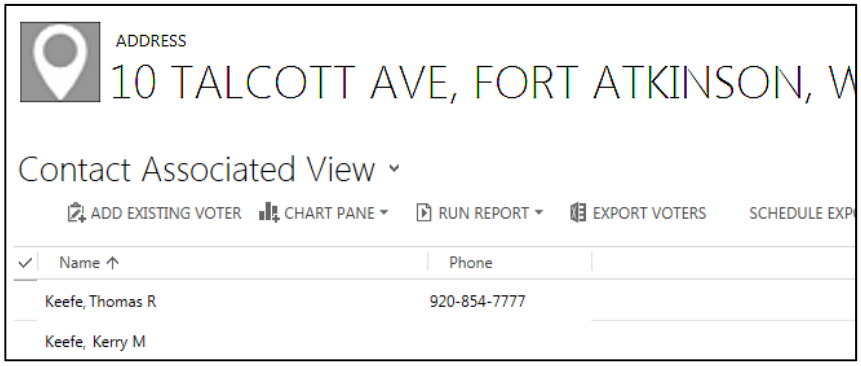
Deactivate an Address

Maintaining accurate data is paramount to address management as many aspects of election management are tied to an address. Deactivate the address: if an address has incomplete address info; if the address is outside the municipality; or if the address does not exist. Do not disenfranchise your voters. Before deactivating an address verify no voters are associated with that address.

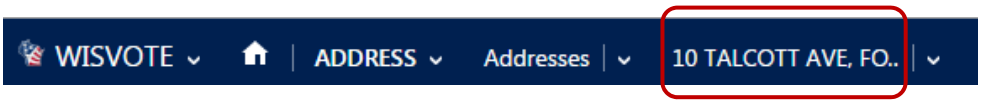
1. Click the Addresses tile to open the *Address* view page
2. Enter the address in the *Search for records* field
3. Click on the address name to open the record
4. In the top navigation menu, click the drop-down arrow to the right of the name of the address
5. Click the Voters tile in the top navigation bar



6. The Contact Associated view will open; all active voters assigned to the specific address will display in the grid



- If no contacts are listed, click the specific address in the top navigation bar to return to the address page;



- If contacts exist, see *Contacts Exist in Associated View*

7. Click the Deactivate button
   Note: to re-activate click the Activate button; the button displays on deactivated addresses

Contacts Exist in Associated View

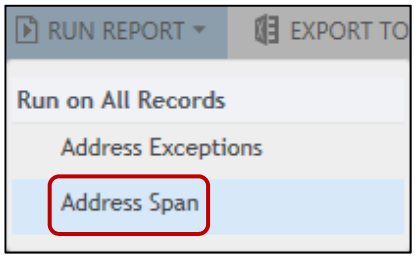
Actions to take if a voter is associated with a bad address

- If the voter registered in the wrong municipality: the voter should be contacted, the voter record inactivated, and the address should be inactivated (and notify the Elections Helpdesk to move the address to the correct municipality)
- If there is a typo in the address: correct the address, this will automatically update the voters address info; do not deactivate address
- If it is not a valid address: consult the voter's voter registration form (EL-131) and verify the address matches the WisVote address. If any discrepancies exist correct the address. If the addresses are the same contact the Elections Helpdesk

Address Span Report

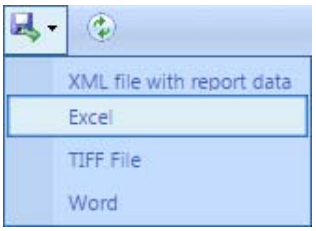
The address span report can be used to assist voters in determining where their voting location is for a given election based on their address. The address span report only reflects active addresses within WisVote (regardless of whether or not there is a voter assigned to them). For a complete address span of all addresses within your municipality you should contact your county or local land information office.

1. To run the address span report, click the Addresses tile to open the *Address* view page
2. Click *Run Report* at the top of the *Address* view page
3. Select *Address Span* from the drop-down menu
4. The report will generate in the report viewer window



5. To run the report for a specific election, click the Election Name drop-down menu in the report viewer and select the desired election
6. Click the View Report button to generate the new address span report

7. Click the Save & Export button to save and export the report
   Note: Save & Export the report in Excel to quickly filter and sort the report



7.3 Districts

District Combinations

District combinations are commonly referred to as district combos or DC's. They are a unique series of numbers and dashes. No district combo is the same. District combination boundaries are created using the boundaries of wards overlaid with school districts creating the smallest possible geographic area that can be on a ballot.

For the majority of the state, school district and ward boundary updates are received directly from county land information offices. Counties are now required to submit ward, municipal, and supervisory district boundary changes to LTSB (Legislative Technology Services Bureau) twice a year on January 15 and July 15. Elections staff is working with LTSB to receive these updates directly from them on a regular basis prior to the Spring and Fall election cycle. Most district combinations have a map associated to them that can be viewed and used for data quality verification.

15281-001-5642-1

15 = Door County

281 = DOA (Department of Administration) assigned HINDI code (municipal code)

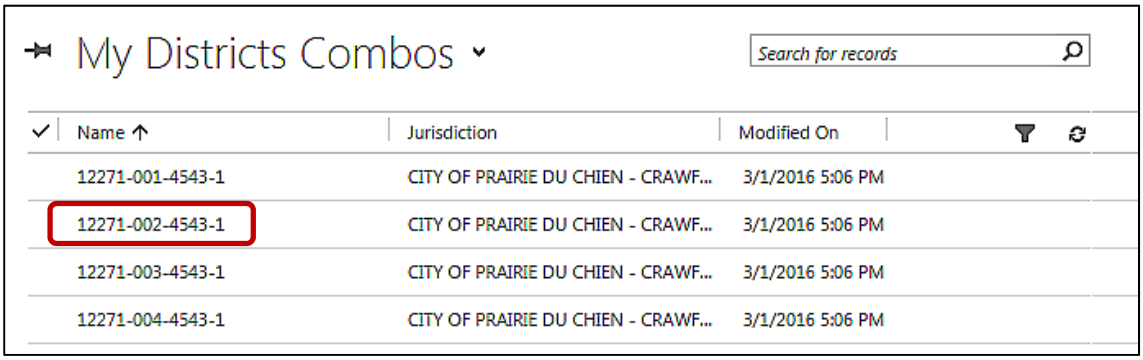
001 = Ward 1

5642 = Sturgeon Bay Unified School district

1 = the last number represents whether this particular district combination has a sanitary district or is in more than one school district

Access a District Combination Map

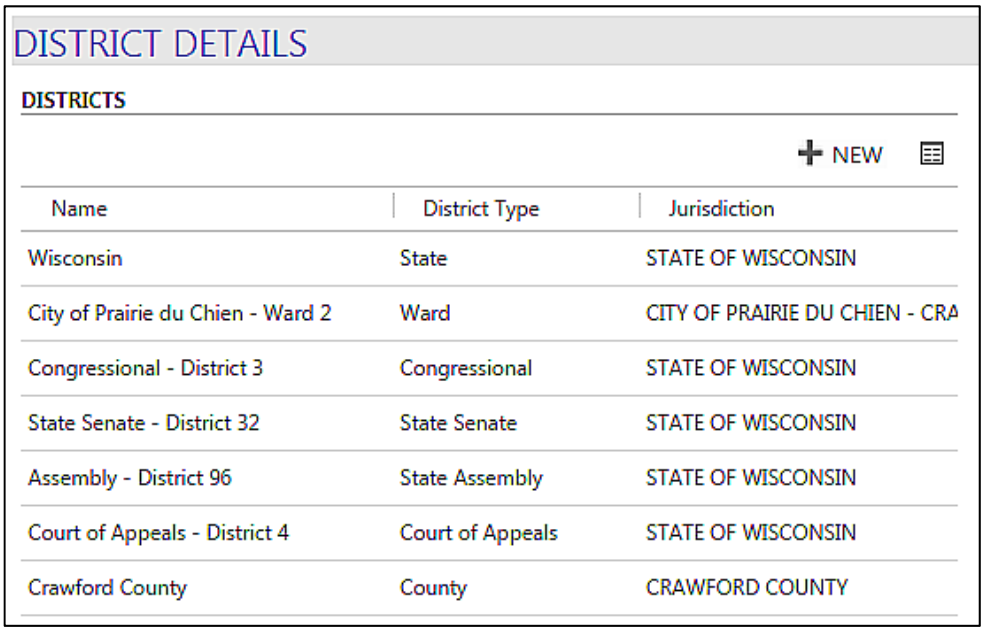
1. Click the District Combos tile
2. The District Combo View page will open and display the *My District Combos* view; click the District Combo name field to open the District Combo record



The General tab on the District Combo Information page contains the Name, District Combo Code, Description, County, Jurisdiction, and Map fields

The Map field will be checked if the map includes the district combo boundaries.

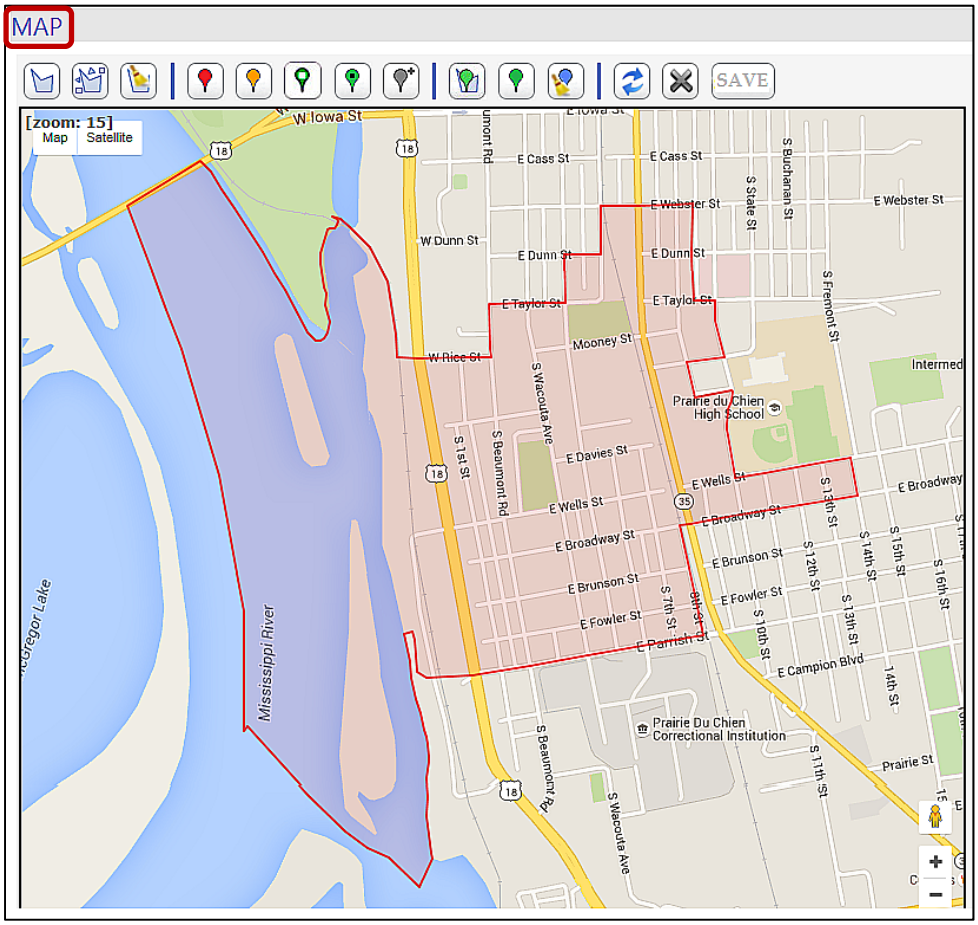
The District Details tab contains the Districts grid; the Districts data grid contains all of the specific districts that are an attribute of the district combo



Name	District Type	Jurisdiction
Wisconsin	State	STATE OF WISCONSIN
City of Prairie du Chien - Ward 2	Ward	CITY OF PRAIRIE DU CHIEN - CRA
Congressional - District 3	Congressional	STATE OF WISCONSIN
State Senate - District 32	State Senate	STATE OF WISCONSIN
Assembly - District 96	State Assembly	STATE OF WISCONSIN
Court of Appeals - District 4	Court of Appeals	STATE OF WISCONSIN
Crawford County	County	CRAWFORD COUNTY

Review the Districts associated with the district combos when there is a boundary change to ensure accuracy. Depending on the election, the different district types will be utilized to derive ballot styles which determine the ballot a particular voter receives.

Click the Map tab at the bottom of the District Combo record to expand the view and display a map of the district combo. The boundaries of the district combo are defined by a dark red outline and red shading, it is the actual geographic area represented by this particular district combo.



Districts

The district tile lists all the districts within WisVote. By changing the view to *My Districts* you can see all the corresponding districts within the jurisdiction you are logged into such as, ward, assembly, aldermanic, and supervisory. Specific districts are attributes of district combinations. There are also several views for each district type that can be utilized to view information about a given district.

District Types

- State of Wisconsin
- Congressional
- State Senate
- State Assembly
- Court of Appeals
- District Attorney
- Circuit Court
- County
- County Supervisory
- Multi-Jurisdictional Judge
- Ward
- Municipality
- Aldermanic
- School
- High School
- First Class School
- Technical College
- Sanitary
- Incorporation

Map Icons

View Districts: review several districts within the area of the respective district combo.

View Adjacent Districts: review any districts that are adjacent (or touching) the respective district combo.

Clear Added Districts: clears any districts that were added by using the View Districts and/or View Adjacent Districts.

View Geocode Exception: displays address pins associated to active voters that are associated to an address marked as Invalid Geocode.

View Geocode Warnings: displays address pins associated to active voters that are associated to an address marked as a Geocode Warning.

View Geocode District Combo Mismatch: displays any addresses that are assigned to one district combo but geographically appearing outside of that district combo's boundary.

View Boundary Exceptions: displays any address pin that is within 50 meters (or about 160 feet) from a district combo boundary that has not yet been verified.

Confirm: marks the pin as corrected or verified without actually moving the address pin.
Note: This button only becomes active if one of the other address exception type buttons was clicked.

View Addresses Near Border: displays all address pins within 50 meters (160 feet) of a district combo border.

View All Addresses: displays all address pins assigned to the district combo being displayed.

Clear Addresses: clears all the addresses that have been displayed on the map.

Refresh: refreshes the entire map display without saving any changes.

Cancel: cancel any mistakes or the accidental moving of any pin.
Note: This button will only be activate if an address pin is moved.

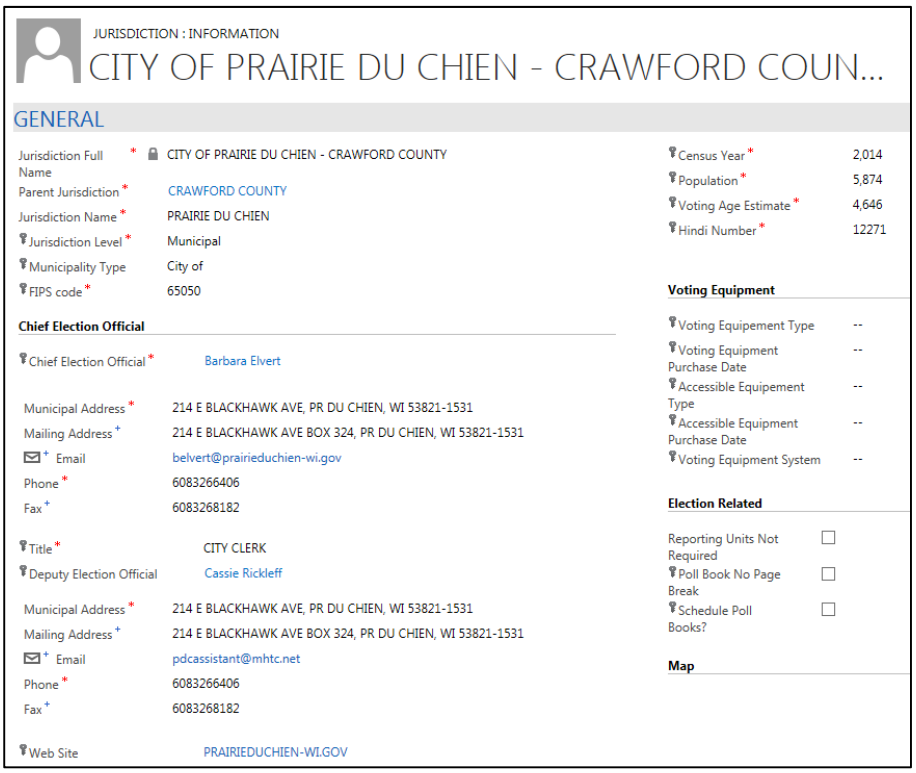
Save: save any changes made within the District Combo mapping screen
Note: anytime an address pin is moved it will get a black hat, saving the record will remove the black hat

Jurisdictions

A jurisdiction record exists for every municipality and county in Wisconsin and contains several fields of key information that connect to several other areas of WisVote.

The following fields in the Jurisdiction record are locked and can only be edited by Wisconsin Elections Committee staff. Notify the Elections Help Desk if any updates are required.

- **Jurisdiction Full Name**: name of the municipality and county that the municipality is in; if a municipality is in more than one county the Jurisdiction Full Name will appear as, "Municipality Name" - Multiple Counties
- **Parent Jurisdiction**: jurisdiction one level above the jurisdiction being viewed; the county is the parent jurisdiction for the municipalities located in that county; the Parent Jurisdiction for all counties is the State of Wisconsin
- **Jurisdiction Name**: name of the jurisdiction
- **Jurisdiction Level**: State, County or Municipality
- **Municipality Type**: City, Town, or Village; will only appear if the jurisdiction level is municipal
- **FIPS Code**: Federal Information Processing Standards code used to link the jurisdiction record with mapping features associated to district combinations; FIPS codes are a common code utilized by GIS applications
- **Census Year**: the year that the most recent Population count and Voting Age Estimate population count comes from
- **HINDI Number**: code associated to every municipality, the first two digits are the county code and the last three digits are the municipal code



7.4 Data Quality

In WisVote, an address may be flagged with one or multiple exception types to notify the user. The different exception types may be resolved by accessing an individual address record or for multiple records, accessing the district combination record.

Types of Address Exceptions

- **Boundary Exception**: any address pin that is within 50 meters of a district combination boundary
- **DC**: Abbreviation for a district combination; DCs are created using the boundaries of wards overlaid with school districts creating the smallest possible geographic area that can be on a ballot
- **Geocode**: description used to determine the location of an address pin
- **Geocode Exception**: an address of which the system is not certain of the geocoded location; the geocode represented by a red address pin
- **Geocode Warning**: an address which there may be a margin of error of the geocode location; the geocode is represented by an orange address pin

Types of Mapping Problems

New Streets and Street Name Changes

When a new street is created or a street name changes in your jurisdiction, the updated address information should be reported to the United States Postal Service (USPS) as soon as possible. WisVote validates all addresses against the information in the USPS database.

Municipalities should report new street and street name changes to USPS through their local postmaster. Many municipal planning departments have contacts with the postmaster and report these types of changes regularly.

Streets that are Missing or Named Incorrectly on the Street Maps

If a street is missing or named incorrectly, please contact the Elections Helpdesk immediately

District Boundary Errors

Boundary line errors should be reported immediately to the Elections Help Desk. The municipality will be notified prior to updating district boundaries in WisVote and provide a list of impacted voters whose district combinations may need to be changed as a result of the correction. A voter's district combination will only change in WisVote if it is approved by the clerk.

District boundaries are generally not updated after absentee ballots are issued for an election immediately after an election when voter participation is being recorded. Staff will work with clerks to determine the most appropriate time to update their jurisdiction's district boundaries.

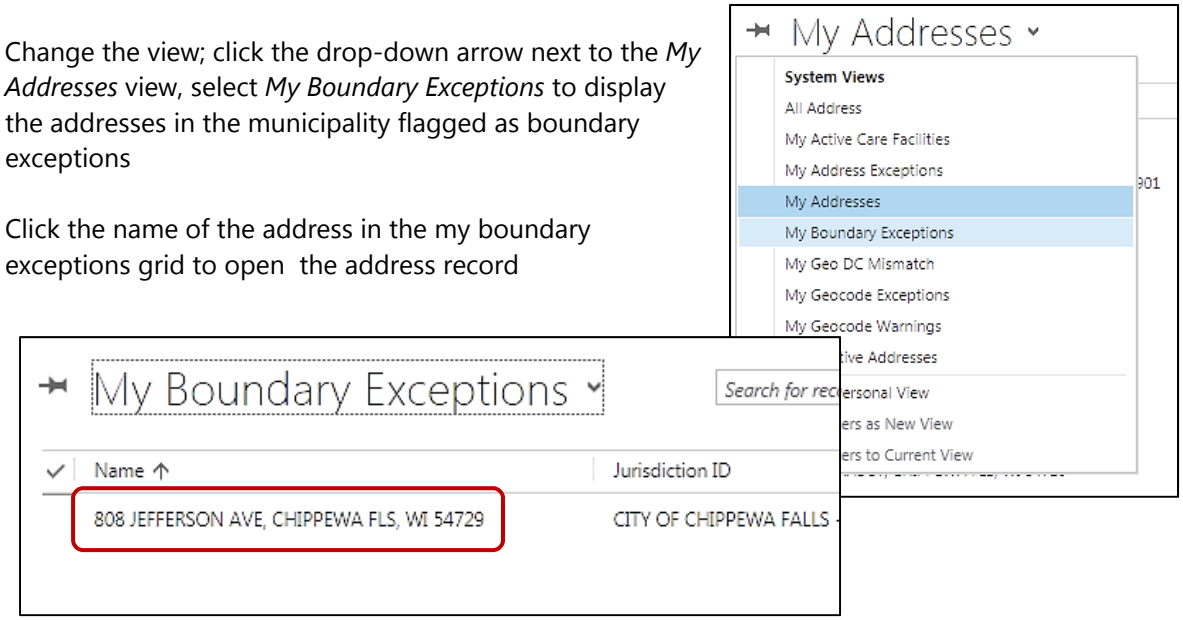
Correct a Boundary Exception

From the Address Record:

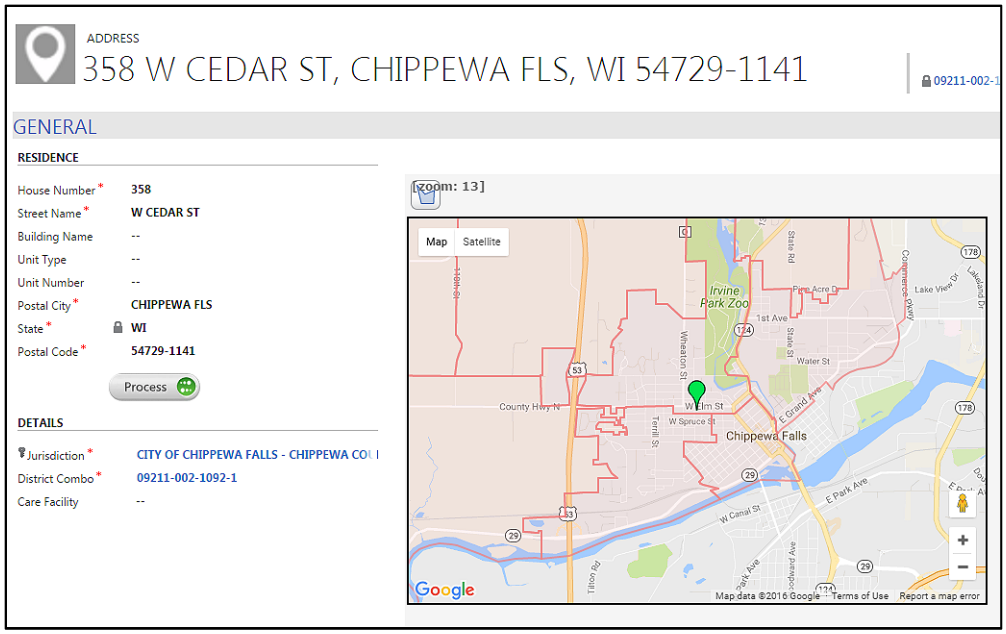
1. Click the Addresses tile

2. Change the view; click the drop-down arrow next to the *My Addresses* view, select *My Boundary Exceptions* to display the addresses in the municipality flagged as boundary exceptions

3. Click the name of the address in the my boundary exceptions grid to open the address record



4. Verify the pin location of the address , click and move the address pin to the correct location



5. Click Save & Close to return to the Address view page
   Note: The address will no longer appear in the My Boundary Exceptions grid

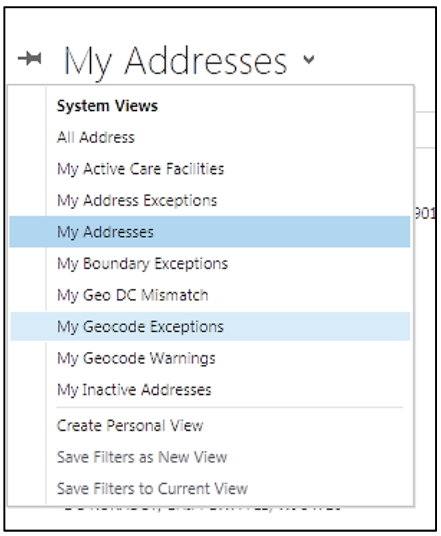
Correct a Boundary Exception from the District Combination Record:

1. Click the District Combos tile
2. On the *District* view page, click the District Combination below the name field to open the District Combo Information page
3. Click the Map tab to expand the view
4. Click the View Boundary Exceptions button above the map
5. Verify the pin location of the address, click and move the address pin to the correct location
6. Click Save & Close to return to the Districts Combos view page
   Note: The address will no longer appear in the my boundary exception grid

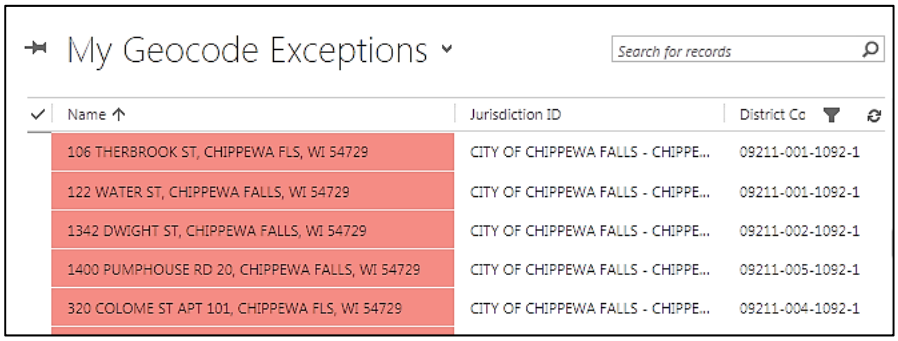
Correct a Geocode Exception

From the Address Record

1. Click the Address tile
2. Change the view; click the drop-down arrow next to the *My Addresses* view, select *My Geocode Exceptions* to display the addresses in the municipality flagged as geocode exceptions



3. Click the name of the address in the my geocode exceptions grid to open the address record



4. Verify the pin location of the address , click and move the address pin to the correct location
5. Click Save & Close to return to the Address view page
   Note: The address will no longer appear in the my geocode exceptions grid

Correct a Geocode Exception from a District Combination Record:

1. Click the District Combos tile
2. On the *District* view page, click the District Combination below the name field to open the District Combo Information page
3. Click the Map tab to expand the view
4. Click the View Geocode Exceptions button above the map
5. Verify the pin location of the address, click and move the address pin to the correct location
6. Click Save & Close to return to the Districts Combos view page
   Note: The address will no longer appear in the my geocode exception grid

Correct a Geocode Warning

From the Address Record:

1. Click the Address tile
2. Change the view; click the drop-down arrow next to the *My Addresses* view, select *My Geocode Warnings* to display the addresses in the municipality flagged as geocode warnings
3. Click the name of the address in the my geocode warnings grid to open the address record
4. Verify the pin location of the address , click and move the address pin to the correct location
5. Click Save & Close to return to the Address view page
   Note: The address will no longer appear in the my geocode warnings grid

Correct a Geocode Warning from the District Combo Record:

1. Click the District Combos tile
2. On the *District* view page, click the District Combination below the name field to open the District Combo Information page
3. Scroll down the page; click the Map tab to expand the view
4. Click the View Geocode Warnings button above the map
5. Verify the pin location of the address, click and move the address pin to the correct location
6. Click Save & Close to return to the *Districts Combos* view page
   Note: The address will no longer appear in the my geocode warnings grid

8.1 Clerk Training

2005 Wisconsin Act 451 requires that all municipal clerks attend a Wisconsin Elections Commission sponsored training program at least once every two years. Wis. Stat §7.15(1m). All Wisconsin municipal clerks must attend the Municipal Clerk Training Core Curriculum Course (MCT Core), by law, before they are certified to conduct an election.

Municipal clerks must take and report a minimum of six hours of election training every two years to recertify for the subsequent term. Clerks are required to report their training to the WEC as the agency is tasked with tracking clerk training to ensure they are in compliance with state laws.

All election officials are now on the same training cycle. All current clerks whose training terms would otherwise expire on December 31, 2016 have had their training terms extended to December 31, 2017.

Clerk Training Requirements

If a new clerk takes the 3-hour MCT Core class, the clerk is certified to conduct elections in the current term. For example, the new clerk takes the MCT Core class on January 10, 2015. The clerk is certified to conduct all of the elections in the 2015-2017 term.

If a new clerk takes the 3-hour MCT Core class and an additional three hours of approved election training, for a total of six hours, the clerk is recertified for the following term. For example, if the new clerk takes the MCT Core class plus three hours of election training in the 2015-2017 term, the clerk has recertified for the 2018-2019 term.

If a certified clerk takes a minimum of six hours of approved election training in the current term, the clerk is recertified for the following term. For example, if a certified clerk takes at least six hours of approved election training in the 2015-2017 term, the clerk is recertified for the 2017-2018 term.

If a clerk does not take a minimum of six hours of approved election training in the current term, the clerk loses certification and must retake the 3-hour MCT Class as part of the six hours of required training in the next term. For example, if a clerk does not take at least six hours of approved election training in the 2015-2017 term, the clerk must take six hours of approved election training before the first election in the 2018-2019 term. Three of the six hours must be the MCT Core class.

> ! *Failure to report election training in a timely manner may result in the clerk's loss of certification to conduct elections!*

Clerk Training Tile - System Views

The clerk training tile has three system views: Submitted Training, All Approved Training and All Denied Training. The Submitted Clerk Training view is the default view. To switch views, click the name of the view and select the preferred view from the drop-down list.

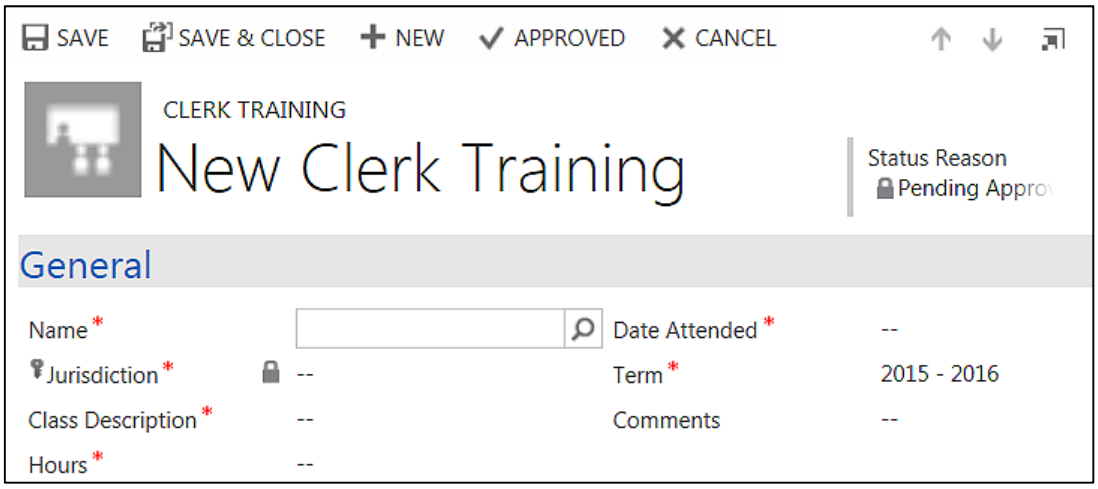
Submitted Clerk Training	Clerk training records that have been submitted; this is the default view

All Approved Training	Clerk training records that have been approved by the WEC
All Denied Training	Clerk training records that have been denied by the WEC

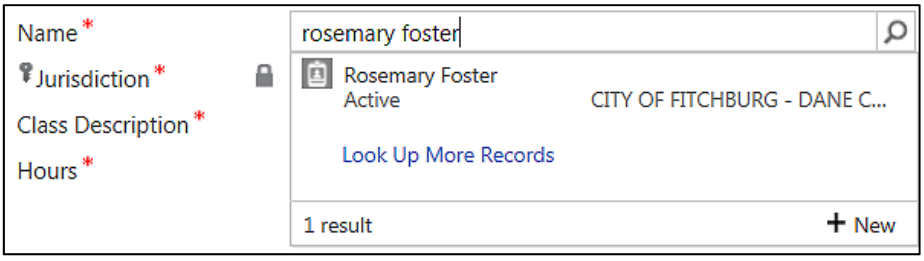
Enter a Clerk Training Record

> *The system will not allow a user to enter future training dates!*

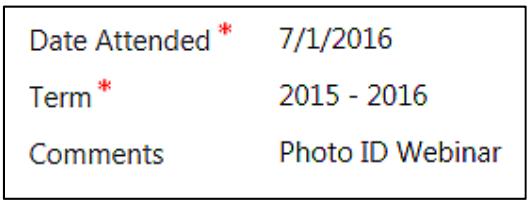
1. Click the Clerk Training tile
2. Click the +*New* button at the top of the *Clerk Training* view page to open a new Clerk Training Record



3. Enter the Clerk's First, and Last Name, then press enter or click the magnifying class to display the results
4. Click the name of the clerk from the drop-down list of records



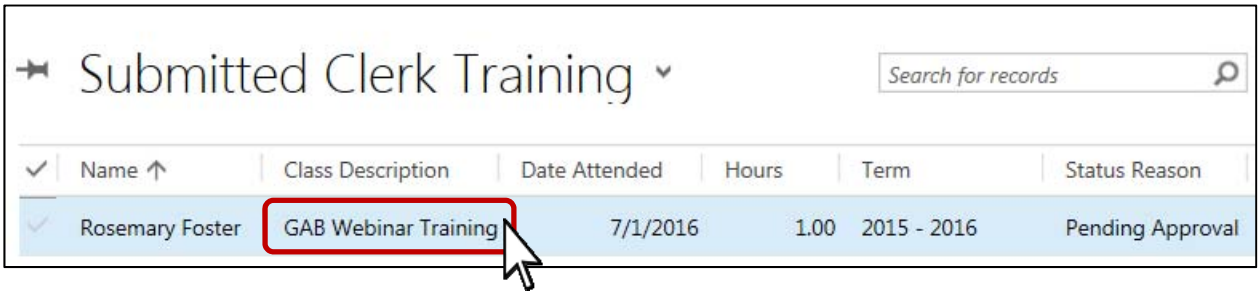
5. Click the Class Description field to display the training class options, then select the training type from the drop-down list
6. Enter the number of hours earned for the training class in the Hours field
   Note: Round up by the quarter hour
7. Enter the Date the training class was taken in the Date Attended field (formatted MM/DD/YYYY)
8. Click the Term field to select the training term



9. Enter a comment in the Comments field (optional)
10. Click Save, to save and add additional information to the record or Save & Close, to save and return to the *Clerk Training* view page

Review a Submitted Training Record

1. Click the Clerk Training tile
2. Change the view on the *Clerk Training* view page to,, "Submitted Clerk Training"
3. Double click the Class Description field to open and review the submitted clerk training record



Clerk Training Record Approval

Training submitted by a clerk will be marked, "pending" in WisVote. Board staff will review the training submitted and mark it as "approved" or "denied." Clerks will receive an email notification when training has been received, approved, or denied. Training denied will include the reasoning for the denial.

- **Response when training is submitted:**
  Thank you for submitting your election training session. You will receive a separate email when your training report has been reviewed and approved by Elections staff.

- **Response when training is approved:**
  Your election training session has been approved. This information will be a permanent part of your clerk training record and will count toward the minimum of six hours of election training you need to recertify for the next term.

- **Response when training is not approved:**
  Your election training session has not been approved by Elections staff for the following reason: (reason for non-approval will be displayed)

- **Response when a new clerk record is set-up:**
  Congratulations on your new position! State law requires that new municipal clerks take the 3-hour Municipal Clerk Core training class to be certified to conduct elections for the current term. This class must be taken via a live webinar conducted by Elections staff or an in-person training class with a certified clerk-trainer.

- **Response when a clerk has submitted sufficient hours to recertify for the next term:** You have submitted a minimum of six hours of election training in the current term and have successfully recertified for the next term.

8.2 Election Worker Training

Election worker records can be created and modified in WisVote to assist with tracking election assignments and election worker training information. Election workers can be assigned to a position, an election, reporting unit and polling place. Polling place locations and election plans should be setup in WisVote before creating election worker records.

Election Workers Tile - System Views

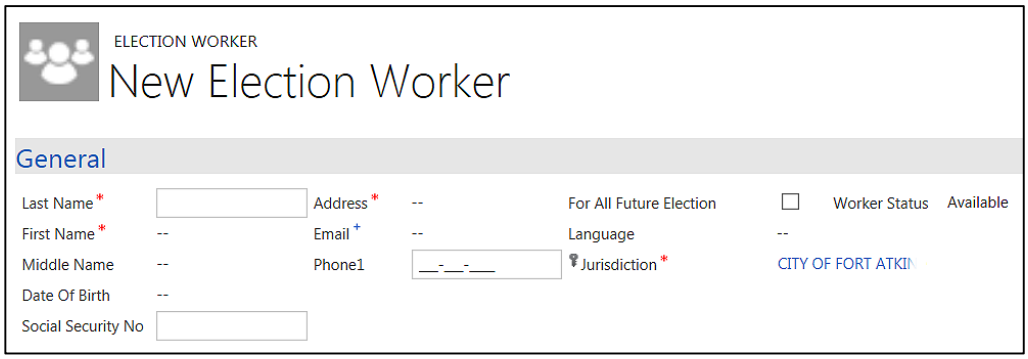
The election workers tile has three system views. The Available Election Workers view is the default view. To switch views, click the name of the view and select the preferred view from the drop-down list.

Available Election Workers	Election worker records with an available worker status; it is the default view
Unavailable Election Workers	Election worker records with an unavailable worker status
All Election Workers	Election worker records with an available and unavailable worker status, and deactivated records

Add a New Election Worker Record

> ! *Only the Last Name, First Name and Address fields are required*

1. Click the Election Workers tile
2. Click the +*New* button to add a New Election Worker
3. Enter Phone1 number
4. Enter the Last Name, First Name, Address and any additional information in the optional fields in the New Election Worker page

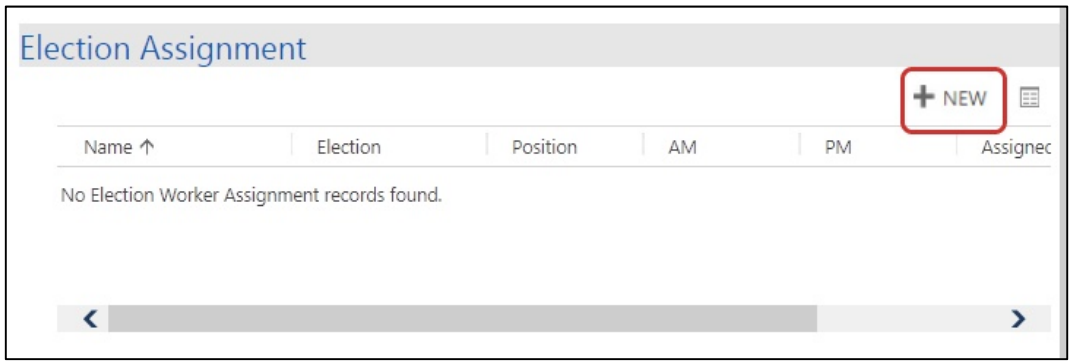


5. Click Save to save and add additional information to the record or Save & Close to save and return to the *Election Workers* view page

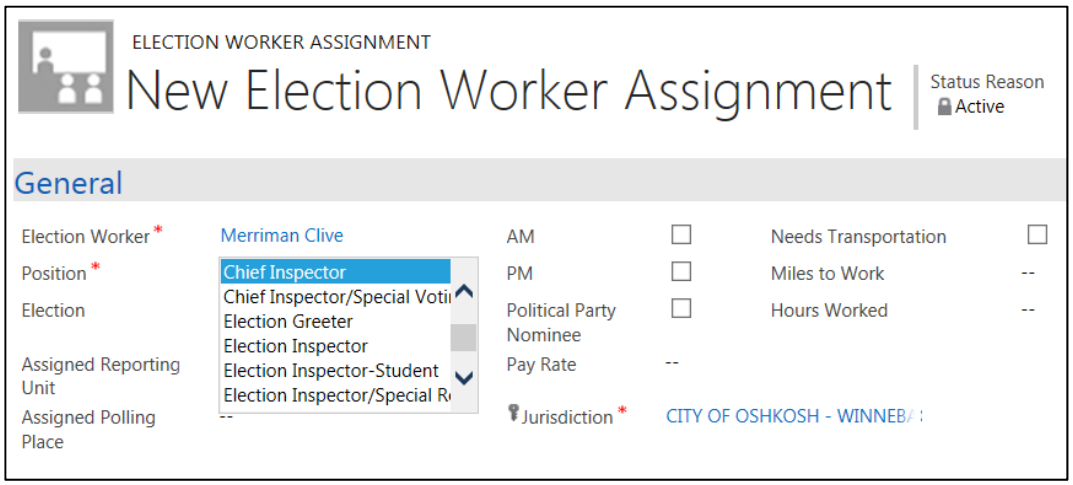
Add an Election Worker Assignment

1. Click the Election Workers tile
2. Click the Election Worker Name in the Available Election Workers grid to open the Election Worker record

3. Click the Election Assignment tab to expand the view
4. Click the +*New* button to add a new election assignment record



5. In the new Election Assignment page, select the position assigned to the election worker in the Position field

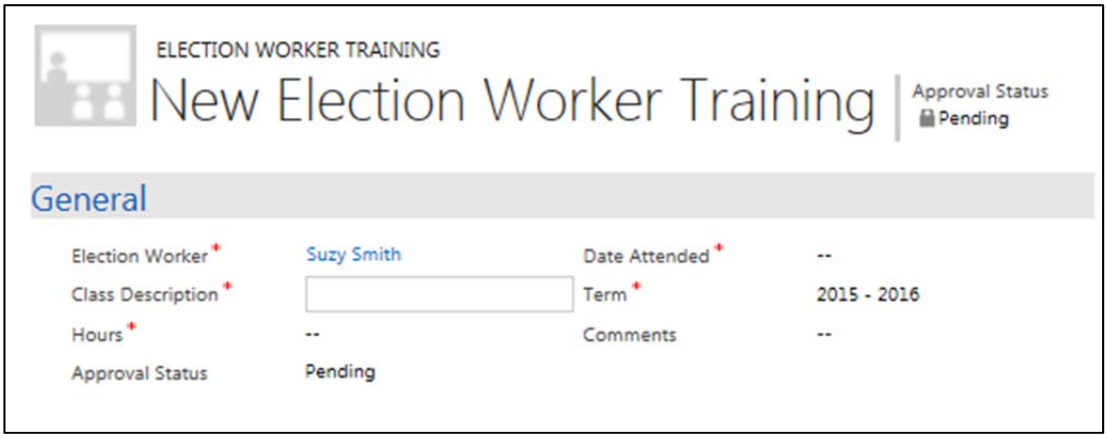


6. Select the Election, and the Assigned Reporting Unit and Polling Place from the drop-down lists
7. Select the AM and/or PM box to indicate the time of day the election worker is assigned to work
8. Select the Political Party Nominee box for political party affiliated election workers, then select the political party they are affiliated with from the drop-down list
9. Enter any additional transportation or payroll information
10. Click Save to save and review the election worker assignment or Save & Close to save and return to the Election Worker Record

Add an Election Worker Training Record

1. Click the Election Workers tile
2. Click the Election Worker Name in the list of Available Election Workers
3. Click the +*New* button below the Training tab to open the New Election Worker Training window

4. Enter the Class Description, Number of Hours, and the Date the training was completed
   Note: Future training dates cannot be entered



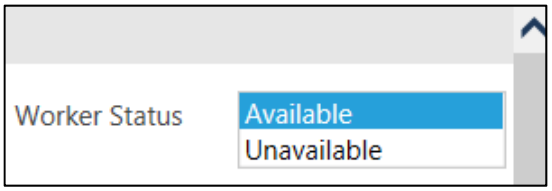
5. Click Save to save and review the training information or Save & Close to save and return to the Election Worker Record

Update the Status of an Election Worker

Election workers are automatically assigned to a worker status of available when their record is created. If an election worker is not available to work at the present time but may be available again in the future, their status can be changed to unavailable. If an election worker is not available for the indefinite future their record can be deactivated.

1. Click the Election Workers tile
2. Click the Election Worker Name in the Available Election Workers grid
3. Click the Worker Status field to display the Worker Status options
4. Select Available or Unavailable to update the election worker status
5. Click Save to save and review the election worker record or Save & Close to save and return to the *Election Workers* view page

> *Election workers can have a worker status of available or unavailable. However, an election worker record can be deactivated and reactivated.*

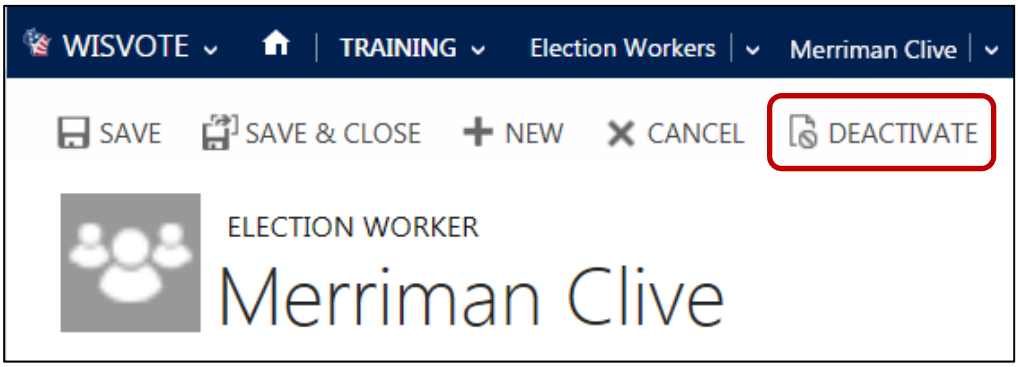


Deactivate an Election Worker Record

If an election worker is not available for the indefinite future their record can be deactivated.

1. Click the Election Workers tile
2. Click the Election Worker Name in the Available *Election Workers* grid

3. Click the Deactivate button at the top of the Election Worker Record



4. Review the deactivated record, then click Cancel to return to the *Election Workers* view page