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Introduction to CRM Electiondata (Customer Relationship Management)



CRM is a widely implemented model for managing interactions with customers and information from all the data sources within an organization. CRM involves using technology to organize, automate, and synchronize business processes via the internet. The Government Accountability Board uses CRM to organize and Ineligible Voter List, Provisional Tracking, Lists, Absentee Tracking, Ballot Review and Voter Felon Audit.



The recommended minimum computer requirements for using CRM:

OS:	Windows 7 SP2 32bit or higher
RAM:	1GB or more
Disk:	1GB Free Space or more
Video:	RAM: 256MB (512 Recommended)
Browser:	Internet Explorer 8*

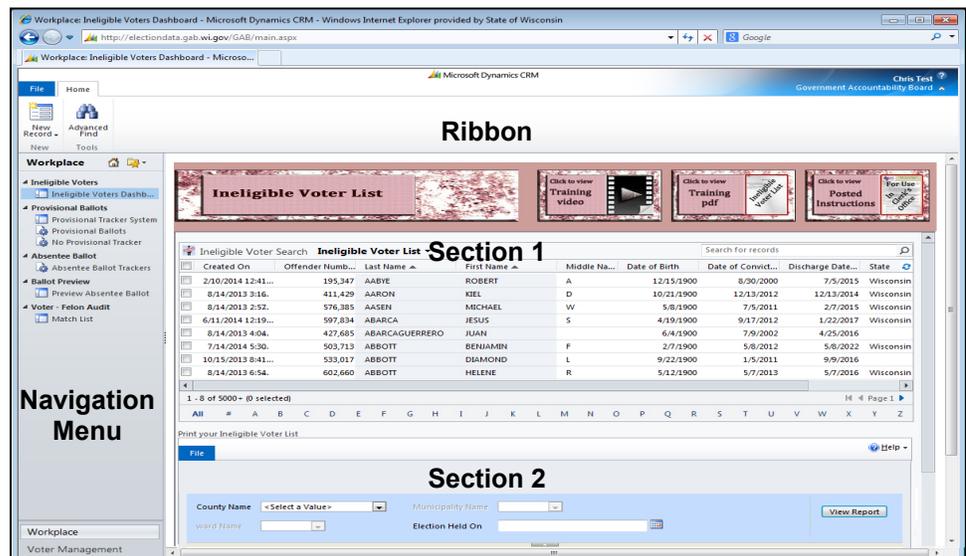
Access the CRM Electiondata website

From the internet browser enter: <http://electiondata.gab.wi.gov>

Enter your SVRS username and password.
Your username must be entered as: **svrs\xxxxx**



The Navigation Menu provides access to Workplace functions.



Introduction to the Provisional Ballot Tracking System



The Provisional Tracking System is an online database where municipal clerks enter their provisional ballot information which has been recorded on the Provisional Ballot Reporting Form (GAB-123r). The GAB-123r is an election reporting form that election inspectors complete. It is available in paper form on the Government Accountability Board's (GAB) website, but has to be entered electronically into the Provisional Tracking System on Election Night. This enables electors who voted a provisional ballot to check on MyVote the status of their provisional ballot and the reason. 42 U.S.C. §15482(a)(5)(B).

The Provisional Tracking System also allows municipal clerks the option to enter the GAB-123r online. This will provide the number of pending provisional ballots by reporting unit that is required to be posted on Election Night. Wis. Stat. § 7.515(5), 2011 SB-381/AB-476, Wis. Stat. § 7.15(15).

In Wisconsin, provisional voting is ONLY used in two situations:

1. If an individual is a first-time voter, who registered by mail (prior to April 4 2014) and has failed to provide the required proof of residence, then these are the ONLY voters who can vote provisionally.
 - a. The poll list will contain the notation "POR Required" to identify those first-time voters who registered by mail and who must show proof of residence before being allowed to vote.
 - b. If an individual fails to provide the required proof of residence he or she may vote provisionally.
 - c. In the case of a first-time voter who voted absentee, the returned absentee ballot will be treated as provisional if no proof of residence has been provided with the returned absentee ballot.
2. If an individual who registers on Election Day has a Wisconsin driver's license, but is unwilling or unable to provide the license number, he or she may vote provisionally.
 - a. Individuals who have a Wisconsin driver's license may NOT use the last four (4) digits of their Social Security number.
 - b. Electors may vote provisionally if providing the driver's license number is the only missing registration element. If an elector is also missing required proof of residence, then he or she may NOT register or vote

The election inspectors record the name of the elector, the Provisional Number (PV#), and the reason for the provisional ballot on the Provisional Ballot Reporting Form GAB-123r. A Provisional Ballot Reporting Form (GAB-123r) must be completed by the election inspectors at the polling place listing all of the electors who cast a provisional ballot. **All electors who have been issued a provisional ballot must be tracked in CRM using the Provisional Ballot Tracking System on election night. The Provisional Ballot Tracking System must also be updated if/when an elector provides the missing information.**

The Provisional Ballot Tracking System

There are three nodes in Provisional Ballots section of CRM:

- Provisional Ballot Tracker (where you enter any issued provisional ballots)
- Provisional Ballots (which is an historical record of all issued provisional ballots in your municipality)
- No Provisional Tracker (this is where you enter that “0” provisional ballots have been issued for the election when this is the case).

This chapter will cover how to use the three nodes. Finally, it provides specific instructions on how you (or the voter) can look up the provisional ballot information on the MyVote Wisconsin website.

Entering a Provisional Ballot Record

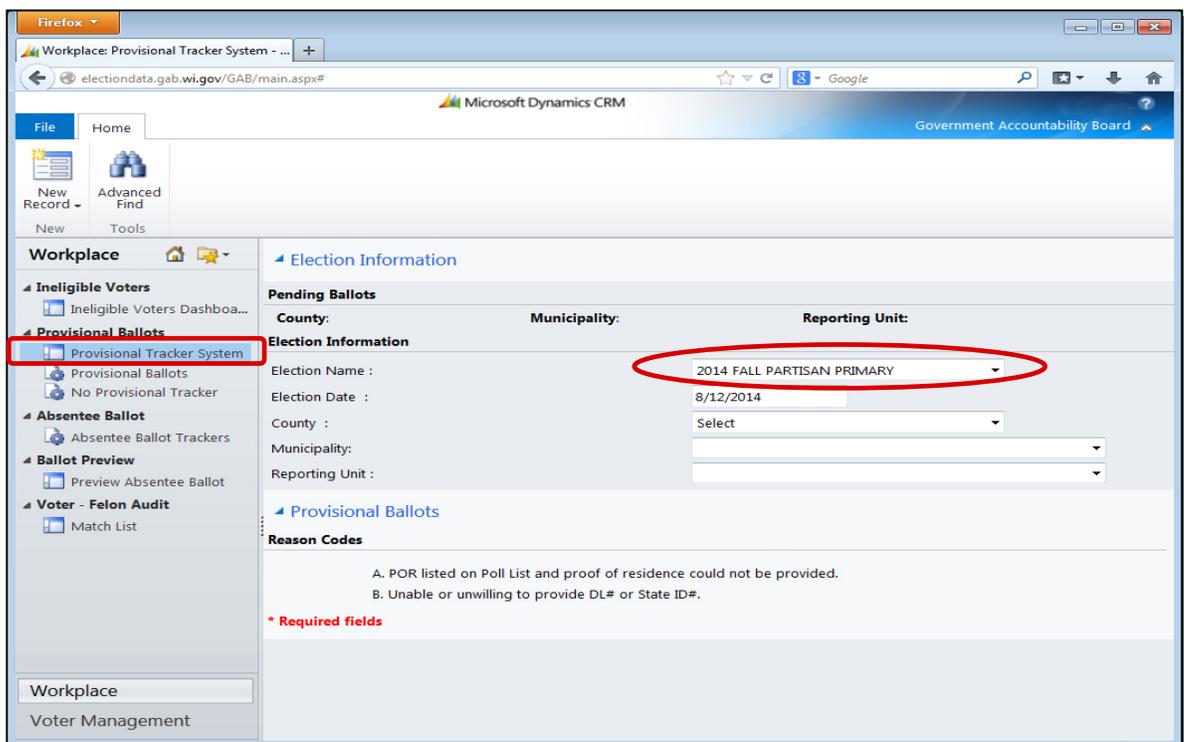
1. From your internet browser log into CRM: <http://electiondata.gab.wi.gov>



2. Enter your SVRS username and password after **svrs**



3. Under the **Workplace** side menu click on **Provisional Tracker System**, and select the appropriate election from the drop-down menu.



- Select from drop-down the correct **County** and **Municipality**.

[Election Information](#)
Pending Ballots
 County: 0 Municipal: 0 Reporting Unit: 0
Election Information
 Election Name : 2014 FALL PARTISAN PRIMARY
 Election Date : 8/12/2014
 County : FOND DU LAC COUNTY - 20
 Municipality: Select
 Reporting Unit : Select
 TOWN OF ASHFORD - 20004
[Provisional Ballots](#)
Reason Codes
 A. POR listed on Poll List and proof of residence could not be provided.
 B. Unable or unwilling to provide DL# or State ID#.

- Select the correct **Reporting Unit**. If any provisional ballots have already been entered they will appear.

[Election Information](#)
Pending Ballots
 County: 0 Municipality: 0 Reporting Unit: 0
Election Information
 Election Name : 2014 FALL PARTISAN PRIMARY
 Election Date : 8/12/2014
 County : FOND DU LAC COUNTY - 20
 Municipality: TOWN OF ASHFORD - 20004
 Reporting Unit : No Provisional Ballots Wards 1 -3
[Provisional Ballots](#)
Reason Codes
 A. POR listed on Poll List and proof of residence could not be provided.
 B. Unable or unwilling to provide DL# or State ID#.

*** Required fields**

ROW#	STATUS	NAME OF ELECTOR	VOTER REG.NO.	ADDRESS OF ELECTOR	PV #	ABSENTEE OR IN-PERSON ELECTOR	REASON CODE	CLERK OR ELECTION INSPECTOR NAME
1	Pending	First: <input type="text"/> Middle: <input type="text"/> Last: <input type="text"/>	Voter Lookup	Line1: <input type="text"/> Line2: <input type="text"/> City: <input type="text"/> Zip: <input type="text"/>		Select	<input type="checkbox"/> a <input type="checkbox"/> b	

- Enter provisional data from the GAB-123r. Click **Voter Lookup** if record already exists.

[Provisional Ballots](#)
Reason Codes
 A. POR listed on Poll List and proof of residence could not be provided.
 B. Unable or unwilling to provide DL# or State ID#.

*** Required fields**

ROW#	STATUS	NAME OF ELECTOR	VOTER REG.NO.	ADDRESS OF ELECTOR	PV #	ABSENTEE OR IN-PERSON ELECTOR	REASON CODE	CLERK OR ELECTION INSPECTOR NAME
1	Pending	First: JESSICA Middle: V Last: TRUCE	Voter Lookup	Line1: <input type="text"/> Line2: <input type="text"/> City: <input type="text"/> Zip: <input type="text"/>		Select	<input type="checkbox"/> a <input type="checkbox"/> b	

7. Enter the provisional voter's **First, Last, and Middle Name**. The **Status** field will default to a status of **Pending**. The provisional ballot statuses are:
 - a. Requirements Met – Counted at PP: This status will automatically update when the election date is provided.
 - b. Requirements Met – Pending BOC: The status should be changed to Requirements Met – Pending BOC if the date provided is after the Election Day.
 - c. Counted: The status should be changed to Counted after the Board of Canvass returns the GAB-123r and a voter number is entered on the form by the Board of Canvassers.
 - d. Rejected – Failed to Provide Missing Information: This status will automatically update provisional ballots in pending status where the voter did not provide the required information by 4pm on the Friday before the election.
 - e. Rejected – BOC: This status is entered after the Board of Canvassers returns the GAB-123r.

8. If the voter is a currently registered voter in SVRS, the Voter Reg. No – Voter Lookup tool will allow you to locate the voter in SVRS and pull in voter information into the provisional ballot record in CRM.



If the provisional ballot is cured and a voter number is given to the voter, you will also need would use the Record Votes node in SVRS to record the vote. See Post Election Activities chapter.

Click on [Voter Lookup](#) and a screen will appear that will allow you to select the voter that was issued a provisional ballot.

VOTER REG.NO. AD

Lin

Voter Lookup Lin

Cit

Zip

Voter Reg. #	First name	MI	Last Name	Address Line1	Address Line2	City	Zip Code	Ward
Select 0013795293	JESSICA	V	TRUCE	W3103 MAIN ST		CAMPBELLSPC	530102504	Town of Ashford - Ward 3

ROW#	STATUS	NAME OF ELECTOR	VOTER REG.NO.	ADDRESS OF ELECTOR	PV #	ABSENTEE OR IN-PERSON ELECTOR	REASON CODE	CLERK OR ELECTION INSPECTOR NAME	123R PAGE NO.	NOTE	TYPE OF PROVISIONAL DOC. PROVIDED	METHOD OF PROVIDING MISSING INFO.	DATE AND TIME ELECTOR PROVIDED MISSING INFO.	VOTER NUMBER ISSUED	WARD	POLLING PLACE	SAVE
------	--------	-----------------	---------------	--------------------	------	-------------------------------	-------------	----------------------------------	---------------	------	-----------------------------------	-----------------------------------	--	---------------------	------	---------------	------



Clicking [Select](#) will automatically fill in the Name, Address, Ward, and Voter Reg Number from the SVRS voter record. It will overwrite any data already entered in the name and address fields.

ADDRESS OF ELECTOR

Line1:

Line2:

City:

Zip:

9. Enter the provisional voter's address. The address should be listed on the GAB-123r.

ROW#	STATUS	NAME OF ELECTOR	VOTER REG.NO.	ADDRESS OF ELECTOR	PV #	ABSENTEE OR IN-PERSON ELECTOR	REASON CODE	CLERK OR ELECTION INSPECTOR NAME	123R PAGE NO.	NOTE	TYPE OF PROVISIONAL DOC. PROVIDED	METHOD OF PROVIDING MISSING INFO.	DATE AND TIME ELECTOR PROVIDED MISSING INFO.	VOTER NUMBER ISSUED	WARD	POLLING PLACE	SAVE
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10. Enter the **Provisional Voter Number (PV#)**.

PV #

11. Select **Absentee** or **In-Person** from the drop-down.

ABSENTEE OR IN-PERSON ELECTOR

Select ▼

12. Select a **Reason Code**.
More than one Reason Code can be selected.

▲ Provisional Ballots

Reason Codes

A. POR listed on Poll List and proof of residence could not be provided.

B. Unable or unwilling to provide DL# or State ID#.

REASON CODE

a
 b

13. Enter the **Clerk or Election Inspector's Name** from the GAB-123r.

CLERK OR ELECTION INSPECTOR NAME

14. Enter the GAB-123r page number in **123R Page No.**
 The page number is located on the top right corner of the GAB-123r.

123R PAGE NO.

15. A **Notes** field is provided where you may type in notes that were written on the GAB-123r. The page number is located on the top right corner of the GAB-123r.

NOTE

CONTINUE(to step 16): If the voter has cured the provisional ballot at the polling place and was issued a voter number, continue completing the record. You will need to provide the Type of Provisional Documentation, the method it was providing, the date and time the information was submitted.



*If the date entered is Election Day the status will change to **Requirements Met – Counted at PP**.*

SAVE: If the voter has not yet provided the necessary documentation, you will need to **Save** the record. You will need to update the provisional ballot record in CRM when the voter provides documentation.



*If the date entered is after Election Day the provisional ballot status will automatically change to **Requirements Met – Pending BOC**. The provisional ballot status of **Counted** must be manually chosen.*

ROW#	STATUS	NAME OF ELECTOR	VOTER REG.NO.	ADDRESS OF ELECTOR	PV #	ABSENTEE OR IN-PERSON ELECTOR	REASON CODE	CLERK OR ELECTION INSPECTOR NAME	123R PAGE NO.	NOTE	TYPE OF PROVISIONAL DOC. PROVIDED	METHOD OF PROVIDING MISSING INFO.	DATE AND TIME ELECTOR PROVIDED MISSING INFO.	VOTER NUMBER ISSUED	WARD	POLLING PLACE	SAVE
------	--------	-----------------	---------------	--------------------	------	-------------------------------	-------------	----------------------------------	---------------	------	-----------------------------------	-----------------------------------	--	---------------------	------	---------------	------

16. Enter the **Type of Provisional Documentation Provided** (this is a free-form text field), and select the **Method of Providing Missing Information** from the drop-down.



*The **Method of Providing Missing Information** should correspond to the reason the voter was given a provisional ballot. For example, a DL# may be provided by telephone if **Reason b** is the reason code entered.*

TYPE OF PROVISIONAL DOC. PROVIDED

METHOD OF PROVIDING MISSING INFO.

WI DL

Phone

17. Enter the **Date and Time the Elector Provided the Missing Information**.

DATE AND TIME ELECTOR PROVIDED MISSING INFO.

__/__/__ AM

Input a date and time

18. Enter the **Voter Number Issued** from the GAB-123r. If a voter number is entered on the GAB-123r the **Status** should be changed to **Counted**.

VOTER NUMBER WARD ISSUED

19. After you have entered all of the information for the provisional voter click the **Save** button and proceed to the next provisional ballot issued. When you are finished exit the Provisional Ballot Tracking System.

123R PAGE NO.	NOTE	TYPE OF PROVISIONAL DOC. PROVIDED	METHOD OF PROVIDING MISSING INFO.	DATE AND TIME ELECTOR PROVIDED MISSING INFO.	VOTER NUMBER ISSUED	WARD	POLLING PLACE	SAVE
1		DRIVER LICENSE	In-Person	8/12/2014	325		ASHFORD TOWN HALL	Save

SAVE

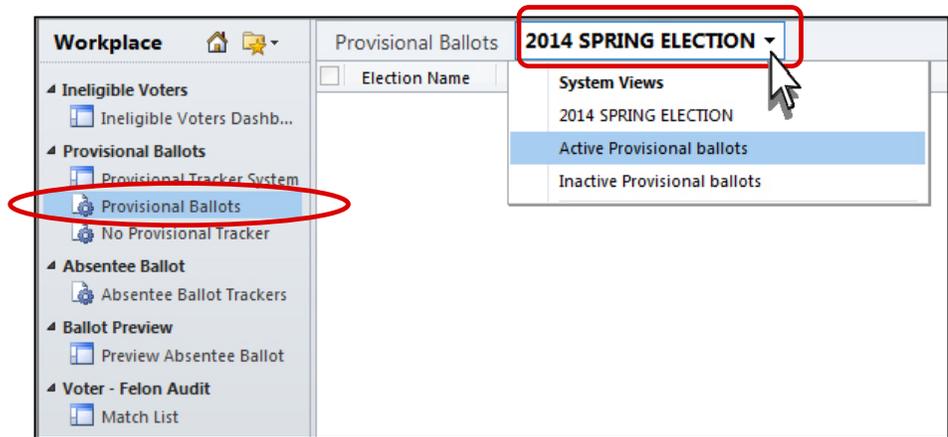
Save

20. To update a previously saved record in the Provisional Ballot Tracking System, click the **Edit** button. Enter the new information in the appropriate field and click **Update** to save the updated information to close the record without updating the information click **Exit**.



Records from Past Elections

Provisional ballots entered into the Provisional Tracking system can be viewed from this side menu. Click **Provisional Ballots**. Selecting Active Provisional ballot view in the **System Views** drop-down list will show all the active provisional ballots from all elections.



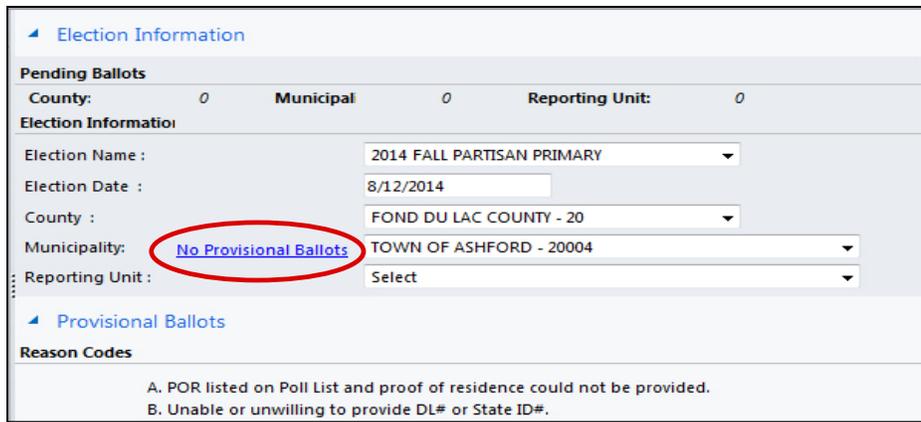
Record No Provisional Ballots



Users have 2 options for recording that there are no provisional ballots in an election: by Municipality and by Reporting unit.

No Provisional Ballots By Municipality

1. Select in the drop-downs: **Election**, **County**, and **Municipality**.
2. Next to the Municipality click on the link **No Provisional Ballots**.



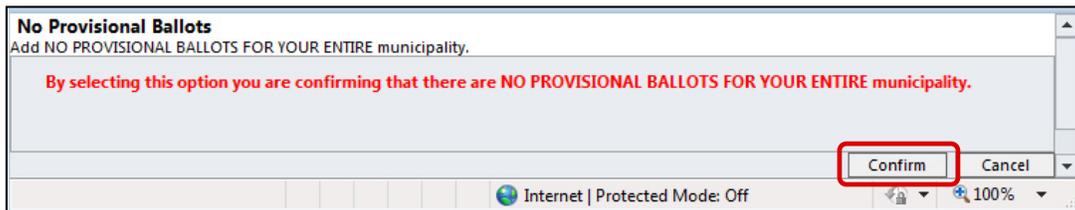
Election Information
 Pending Ballots
 County: 0 Municipal: 0 Reporting Unit: 0
 Election Information:
 Election Name : 2014 FALL PARTISAN PRIMARY
 Election Date : 8/12/2014
 County : FOND DU LAC COUNTY - 20
 Municipality: **No Provisional Ballots** TOWN OF ASHFORD - 20004
 Reporting Unit : Select
 Provisional Ballots
 Reason Codes
 A. POR listed on Poll List and proof of residence could not be provided.
 B. Unable or unwilling to provide DL# or State ID#.

3. A pop-up window will appear with a confirmation message.



The pop-up blocker on your internet browser should be turned OFF in order to receive the confirmation message.

4. Click **Confirm** to complete recording no provisional ballots for the Municipality.



No Provisional Ballots
 Add NO PROVISIONAL BALLOTS FOR YOUR ENTIRE municipality.
 By selecting this option you are confirming that there are NO PROVISIONAL BALLOTS FOR YOUR ENTIRE municipality.
 Confirm Cancel

No Provisional Ballots By Reporting Unit

1. Select in the drop-downs: **Election**, **County**, **Municipality**, and **Reporting Unit**.

A check box will appear next to the reporting unit name.

2. Check the box next to **No Provisional Ballot**, and you are DONE.

Election Information	
Election Name :	2014 FALL PARTISAN PRIMARY
Election Date :	8/12/2014
County :	FOND DU LAC COUNTY - 20
Municipality:	TOWN OF ASHFORD - 20004
Reporting Unit :	<input checked="" type="checkbox"/> No Provisional Ballots Wards 1 -3
Provisional Ballots	

If you need to enter a provisional ballot after you have checked no provisional ballots you simply select the reporting unit and **uncheck** the **No Provisional Ballots**. Afterward continue by following the instructions under the [Entering Data](#) section.

Check the Status of a Provisional Ballot on the MyVote Website



Look up a Provisional Ballot on MyVote Wisconsin. A voter can review the status of their Provisional Ballot by either searching by Name or Provisional Ballot Number.

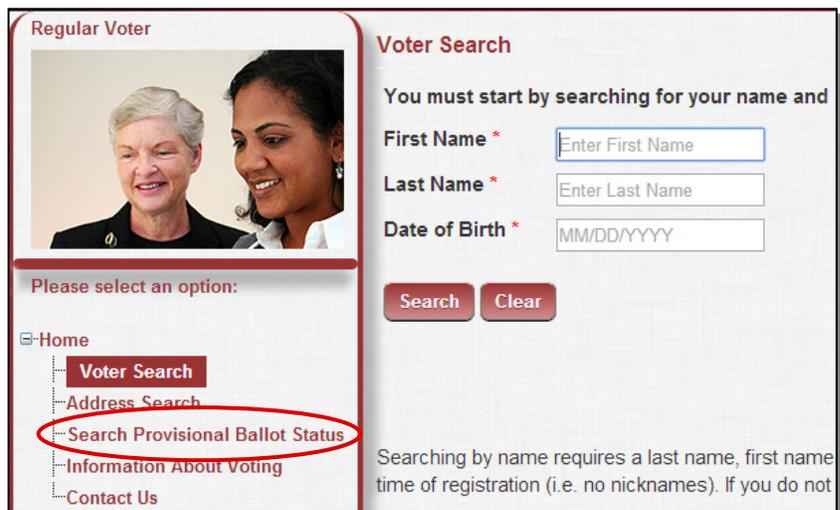
Go to the **MyVote** website at <https://myvote.wi.gov>

1. Click **Regular Voter**.



Search Provisional Ballot Status by Name

2. To Search by **Voter Name** Click on the words **Search Provisional Ballot Status**.



3. Enter in the voter's **Last Name, First Name,** and **Date of Birth.**

4. Click **Search.**

5. Click the underlined name of the provisional voter.

Search Result:

Name	Election Date	Municipality	County	PV Number
<u>FLYNN, ERIC C</u>	2/21/2012 6:00:00 AM	CITY OF MADISON - 13251	DANE COUNTY - 13	1

6. The Provisional Status window will open and display the **PV Number, Election Date, Election Name, Ballot Status,** and **Status Reason.** The ballot information is in the status shown on the **Provisional Voting Information Sheet for Voters.** This form is available on the G.A.B. website gab.wi.gov, and should be given to each voter assigned a provisional ballot at the polling place.

Provisional Ballot Status

PV Number	Election Date	Election Name	Ballot Status	Status Reason
1	2/21/2012	2012 SPRING PRIMARY	Requirements met - Pending Boc	Requirements met. Ballot will be counted, if valid, by the county board of canvassers.

Search Provisional Ballot Status by Provisional Voter (PV) Number

1. To Search by **Provisional Ballot Number** click on the circle next to **PV Number.**
The PV Number is the number entered on the GAB-123r and into CRM Provisional Tracker System.

2. Enter the **Municipality Name (Required), the PV Number** and verify the **Election Date.**

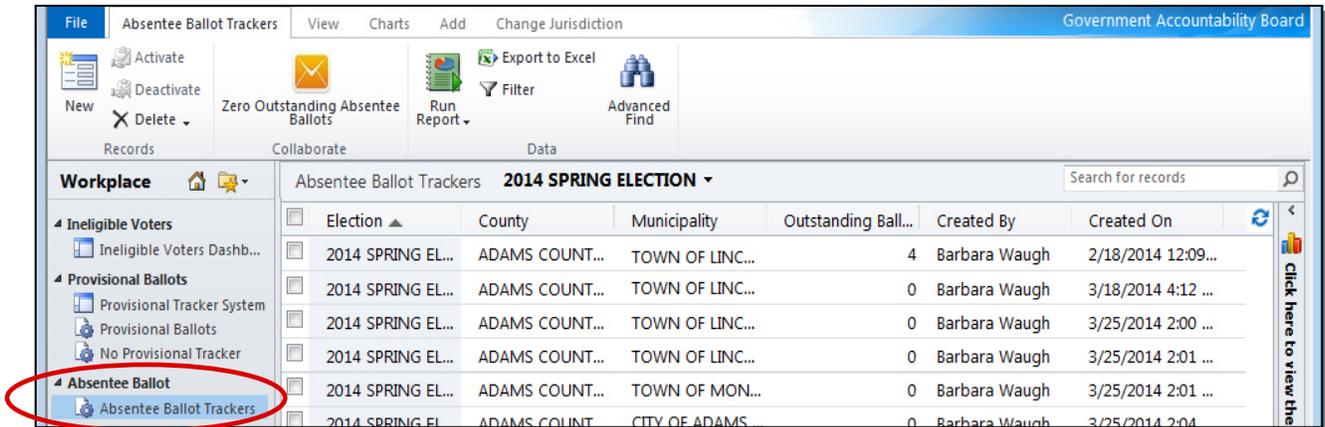
3. Click **Search.**

4. Click the Name of the correct provisional voter. The Provisional Ballot Status Screen appears. Provisional Ballot information will be displayed, showing the **PV Number, the Election Date and Election Name, Ballot Status,** and the **Status Reason** the ballot is in the status shown.

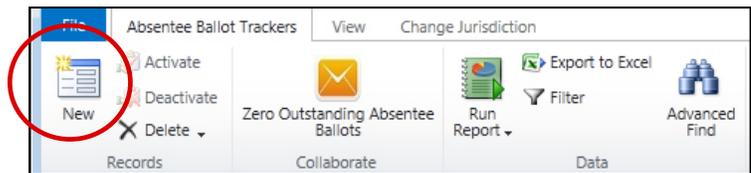
Record Outstanding Absentee Ballots (Optional)

Enter Data

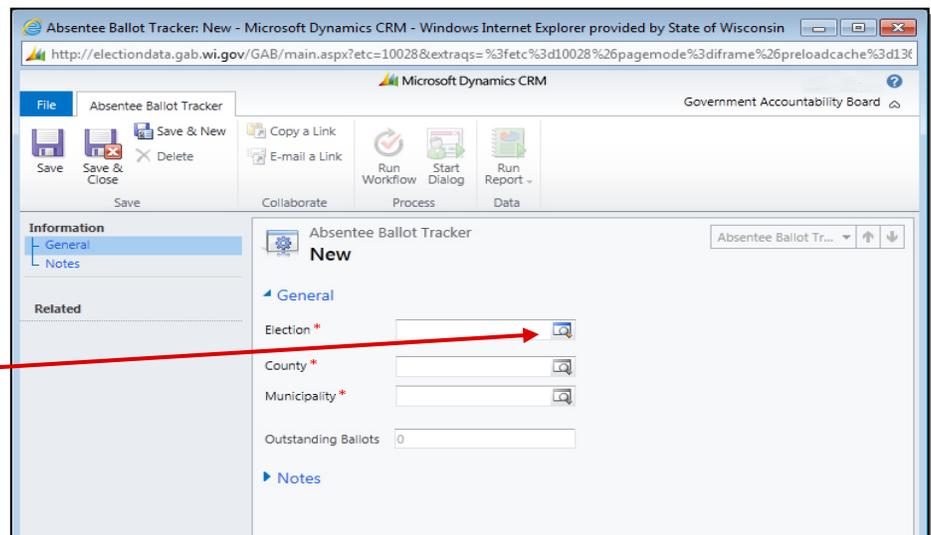
1. Under the **Workplace** side menu click on **Absentee Ballot Trackers**.



2. Select the **NEW** button located on the upper left corner on the top ribbon.



3. A new record will open. Select the correct **Election, County, Municipality, Polling Place Location, and Reporting Unit**.



4. Click here to open the **Look Up Record** window.

- In the **Look Up Record** search screen select the correct choice and click **OK**.

Election* 



To refine your search place a check to **Show Only My Records** or search by election year.

Look Up Record -- Webpage Dialog

Look Up Record
Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Election **Show Only My Records**

View: Election Lookup View

Search: 2014

Election Name	Election Type C...	Election Date	Electic
<input checked="" type="checkbox"/> 2014 SPRING ELECTION	Spring Election	4/1/2014	
<input type="checkbox"/> 2014 LANCASTER SPRING ELECTION	Spring Election	4/1/2014	
<input type="checkbox"/> 2014 D4 SPECIAL ELECTION	Special Election	7/1/2014	
<input type="checkbox"/> 2014 FALL PARTISAN PRIMARY		8/12/2014	

1 - 4 of 4 (1 selected) Page 1

Properties New **OK** Cancel Remove Value



Repeat this **Look Up Record** step for selecting the correct **Election, County, Municipality, and Polling Place Location**.

- Enter the number of outstanding absentee ballots and click **Save & Close**

Absentee Ballot Tracker: New - Microsoft Dynamics CRM - Windows Internet Explorer provided by State of Wisconsin

http://electiondatauat.svrs.wisstate.us/GAB/main.aspx?etc=10001&extraqs=%3fetc%3d10001%26pagemode%3diframe%26

Microsoft Dynamics CRM

Absentee Ballot Tracker

File: Save, Save & Close, Delete, Add: Copy a Link, E-mail a Link, Run Report

Information: General, Notes

Related

Absentee Ballot Tracker **New**

General

Election* 2014 PARTISAN PRIMARY

County* FOND DU LAC COUNTY - 20

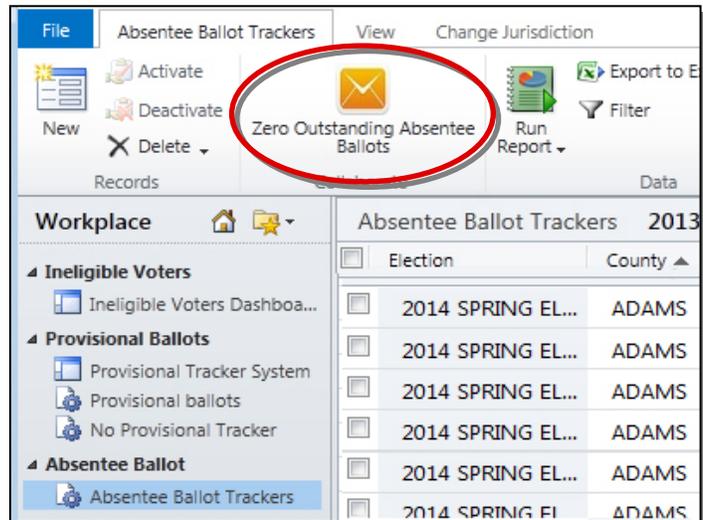
Municipality* TOWN OF ASHFORD - 20004

Outstanding Ballots 5

Zero Outstanding Absentee Ballots

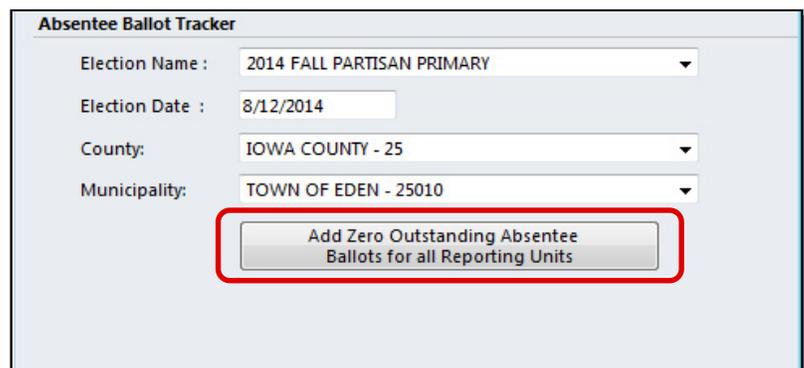
If you determine all of your reporting units have no outstanding absentee ballots you can enter them all together rather than entering each reporting unit value individually.

1. Select the **Zero Outstanding Absentee Ballots** button located on the top ribbon.



2. A pop-up window will open. (*NOTE: The pop-up blocker on your internet browser should be turned OFF in order to receive the confirmation message.)

3. Select from the drop-down the **Election Name** (the date will auto populate).
4. Select the **County** and **Municipality**.
5. Click the **Add Zero Outstanding Absentee Ballots for all Reporting Units** button.



The screenshot shows the 'Absentee Ballot Tracker' dialog box. It contains four dropdown menus: 'Election Name' (set to '2014 FALL PARTISAN PRIMARY'), 'Election Date' (set to '8/12/2014'), 'County' (set to 'IOWA COUNTY - 25'), and 'Municipality' (set to 'TOWN OF EDEN - 25010'). At the bottom, a button labeled 'Add Zero Outstanding Absentee Ballots for all Reporting Units' is circled in red.