

Table of Contents

Maintain Voter Records	2
Key Terms	2
Search for Voter Information.....	3
Correct Typographical Errors or Add Missing Voter Information.....	9
Change Voter Status to Inactive or Cancelled	10
Add UOCAVA Status Indicators	11
Make a Voter Confidential	12
Validate Voter Address	13
Edit the Proof of Residence	15
Merge Duplicate Voter Records.....	16
Unmerge Voter Records	19
Check Voter Transfers and Merged out Voters	21
Check Voter Transfers	21
The Merged Voter Information Report	22
The Voter Listing Report.....	24
Other Options for Filtering the Voter Listing Report:.....	25
The Voter Listing with Districts Report	28
Other Options for Filtering the Voter Listing with Districts Report	29
The Voter Listing with Photo ID Indicators Report.....	31

Maintain Voter Records

The voter node is where all voter-specific information is found. Once a voter has been entered into SVRS, you will use this module to access and update their record. When a voter calls the clerk's office and asks what their normal polling location is, you can find that information on their record in the voter record. The voter node also contains their assigned districts, voting history, mailings history and any changes that have been made to a voter's record. In essence, this is a permanent record containing personal information about the voter.

In this module, there are instructions for searching for information from voter records, making administrative changes to a voter's record, updating a voter's status and cleaning up duplicate voter records. This module will also introduce methods of exporting or printing of voter information. Anytime you make an update to a voter record that was not initiated from a GAB-131 form, the Voter node is used. For a GAB-131 form that is an address or name change for a voter who is already registered, you will need to enter a new voter application as opposed to changing the voter record.

Key Terms

SVRS: The Statewide Voter Registration System (SVRS) is the computerized application that is used statewide to register voters in the State of Wisconsin.

HAVA Check/Interfaces: In 2002, Congress enacted the Help America Vote Act (HAVA), which included requirements for states to maintain an interactive computerized voter registration list to be coordinated with other agency databases within the State. Wisconsin coordinates the SVRS database with other agencies to validate information supplied by persons registering to vote in Wisconsin. These agencies include the Department of Health Services (Vital Records Office), Department of Transportation, and Department of Corrections. These interfaces flag voter records in SVRS that are matches for death or felony records and confirm that driver's license numbers match associated voters' names.

Provider: In SVRS, a Provider provides services for a municipality that does not have access to SVRS (called a Relier). A municipality that uses SVRS only for their own municipality's data is called a Self-Provider.

Relier: In SVRS, a Relier municipality is one that is not directly inputting information into SVRS, but instead is relying on another municipality or the county (the Provider) to enter and maintain their voter registration information.

HINDI: A unique five-digit number (Highway Identification Number) that acts as an identifier for each municipality in the state and forms part of a District Combination code.

District Combo Code: A District Combo is a series of numbers that represent a unique combination of voting districts in which the voter lives. District Combos have a new standard format of **AABCC-DDD-EEEE-F**. In this combination, **AA** is for County, **B** is for Town, **CC** is for Municipality, **DDD** is for Ward 1, **EEEE** is the School District and **F** is for a Split in the Ward. (If there are no divisions within a ward, the last digit will be 1.) See [Districts and Offices](#).

MyVote: MyVote Wisconsin is a website that allows voters to access their district and voting location information if they supply their full name and date of birth or address. It can be found at <https://myvote.wi.gov>.

Search for Voter Information



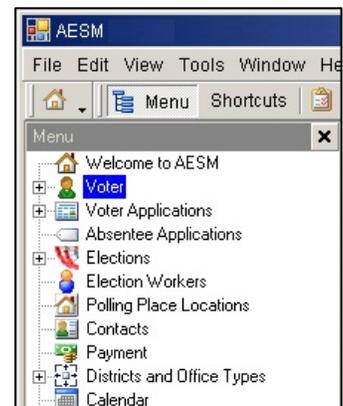
The Voter node is where you access and modify the records of voters in your municipality. Examples of the information available in a voter record include registration status, voting history, address, districts with which the voter is associated, and other registration details. A person does not have a voter record until their GAB-131 registration application has been processed in SVRS. See the [Voter Application](#) chapter for more information.



A voter record contains confidential information; please maintain proper standards of security when accessing voter information.

1. Search for voter record(s) using the search panel.

- Single-click on the **Voter** node from the Main Menu. A search panel should appear on the top half of the screen to the right of the Main Menu tree.
- There are four tabs on the search panel into which you can enter search criteria. Enter your search criteria into one of the blank fields and click on the **Search** button.



Enter multiple search criteria on several tabs to refine your search. Keep in mind you will need to hit the **Clear** button before you do your next search. The search criteria are also cleared when clicking on another node on the menu tree.

- General** tab: You may enter a voter's name, date of birth, address information or voter status (i.e. **Active**) to locate their voter record.

Jurisdiction	Name	Place Of Bir...	Party	Gen...	Status	Status Reas...	Address
13008	FISH, JAMES J		Not Applicable		Active	Registered	4112 MILWAL
13008	FISH, PATRICIA A		Not Applicable		Active	Registered	4235 COUNT
13008	FISH, STEPHEN F		Not Applicable		Active	Registered	4235 COUNT
13008	FISHER, KIMBERLY A		Not Applicable		Active	Registered	503 N FAIR O



The less information entered as search criteria, the more records will be returned. It is often helpful to enter in only the first 3-4 letters of the voter's last name to assist in finding records with uncertain spelling.

- Districts** tab: Locate voter records by ward or other district information.
- Other** tab: Search for voter records that have particular registration dates or by the voter's age. Also search for voter records that were changed between specific dates or by specific users.
- Elections** – Displays a list of elections for your municipality. Search for voters who voted in particular election(s) by checking the box for those election(s). Options vary with the amount of election history loaded into SVRS for your municipality.

c. Results from your search are displayed in the data or results grid below the search panel.



Whenever you are not getting the search results you expect, hit the **Clear** button and try the search again, because search criteria still may be contained within other tabs.



The grid will return a maximum of 1,000 records. If you only need a count of records meeting the search criteria, check the **Count Only** box. The **Count Only** box will give you an accurate count even if the number of records exceeds 1,000. If you need a list of all records, you must refine your search criteria to return less than 1,000 records, and the results will be fully visible in the grid.



When searching for cancelled voter records, you will need to check the **Cancelled / Non-Valid Voters** box under the **People Included in the Search** section of the search panel (upper right-hand corner).

General | Districts | Other | Elections

Last Name: FISH | First Name: | Middle Name: | Suffix: |

Voter Reg Num: | Date of Birth: | Soc Sec Num: | Status: |

House No: | Street Name: | City: | State: | ZIP Code: |

People Included in the Search

- Cancelled / Non-Valid Voters
- Federal Registrants Only
- Property Owners Only

Search Options

- Prior and Alternate Names
- Sounds - Like Search
- Include pending Voter Apps

2. Organize your results in the data grid. [Optional]

a. **Sort by name.** Left click once on the column header containing the word **Name**. You will see a clear right-side-up triangle appear which signifies the results have been put in ascending order. Click once more to put the results in descending order (the triangle will be upside-down). Add a secondary sort after sorting by one column by holding down the **Shift** key and clicking on the second column (e.g. sort by street name, then last name).

Drag a column header here to group by that column

Jurisdiction	Name	Date Of Birth
13008	FISH, JAMES J	1/1/1978
13008	FISH, PATRICIA A	1/1/1900
13008	FISH, STEPHEN F	1/1/1900
13008	FISHER, KIMBERLY A	1/1/1980

b. **Resize your columns or Best Fit.** Right-click once on the grey title bar of the column you wish to resize and choose **Best Fit** from the drop-down menu. Alternately, you could choose **Best Fit (all columns)** to resize all columns. To expand or contract one column at a time, left-click and drag the line dividing the columns to the desired location.

Drag a column header here to group by that column

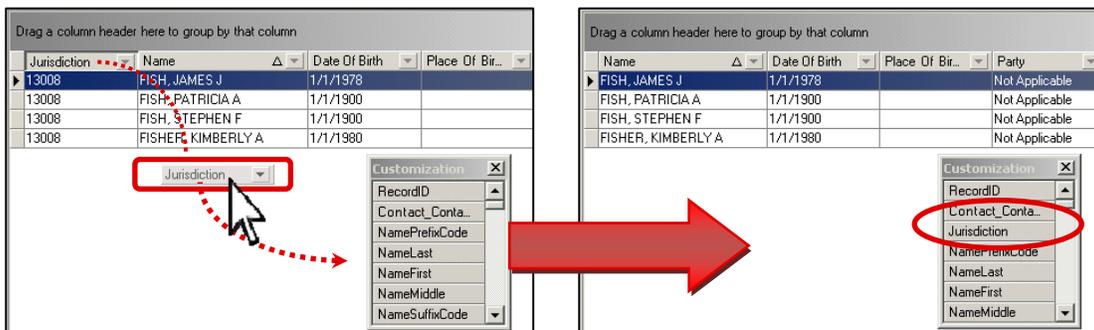
Jurisdiction	Name	Date Of Birth
13008	FISH, JAMES J	1/1/1978
13008	FISH, PATRICIA A	1/1/1900
13008	FISH, STEPHEN F	1/1/1900
13008	FISHER, KIMBERLY A	1/1/1980

- Sort Ascending
- Sort Descending
- Group By This Field
- Group By Box
- Runtime Column Customization
- Best Fit**
- Clear Filter
- Best Fit (all columns)

c. **Move columns.** A column appearing beyond the right margin of the computer screen can be moved within view by left clicking on the column title, holding the mouse button down, and “dragging” the column title to the left. Letting go of the mouse button will “drop” the column into a new position.

- d. **Remove unnecessary columns or add needed columns.** If there are columns you do not wish to see on the results grid, you can remove them by right-clicking on the grey title bar and choosing **Runtime Column Customization** from the drop-down menu. This will bring up the **Customization** box in the lower right hand corner.

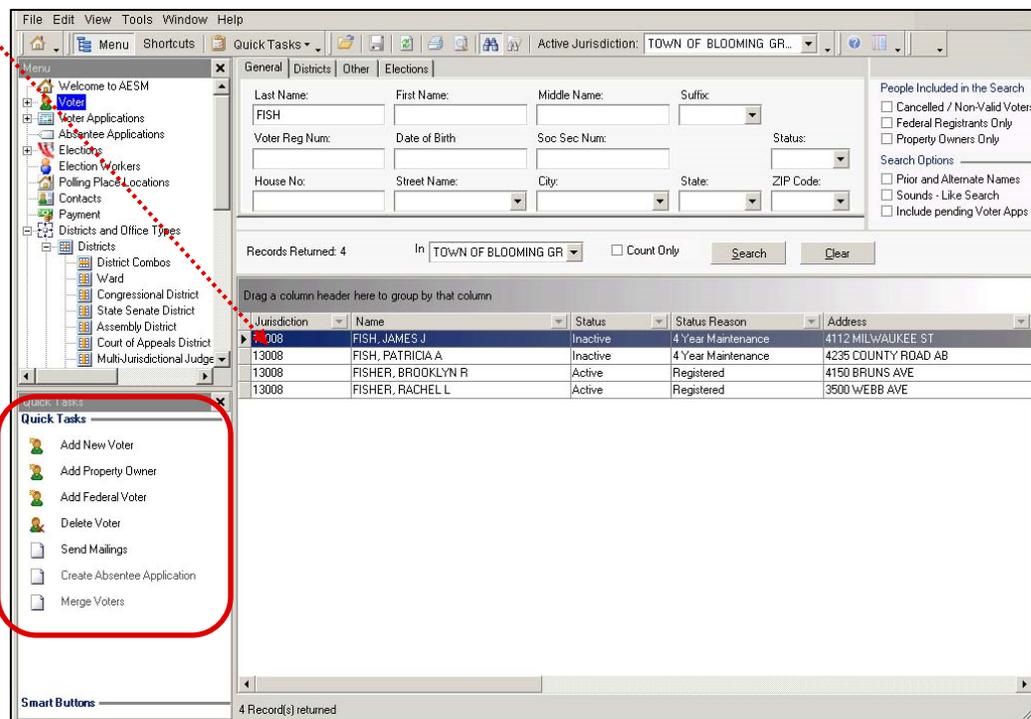
The **Customization** box contains available column headers that could be displayed in the data grid. Remove columns from the results grid by clicking and dragging them into the box. Add columns to the results grid by dragging them from the **Customization** box and dropping them onto the grid results. Close the **Customization** box by clicking on the “X” in the upper right hand corner.



i **Advanced Organization:** For further suggestions and instructions for organizing and exporting of results to files or to print, see the Reports chapter.

3. **Open a voter record** to display more information on a single record.

- a. To view more information for a voter record, open the voter record in the results grid by **double-clicking** on the record. This will open the **Voter Update** screen.

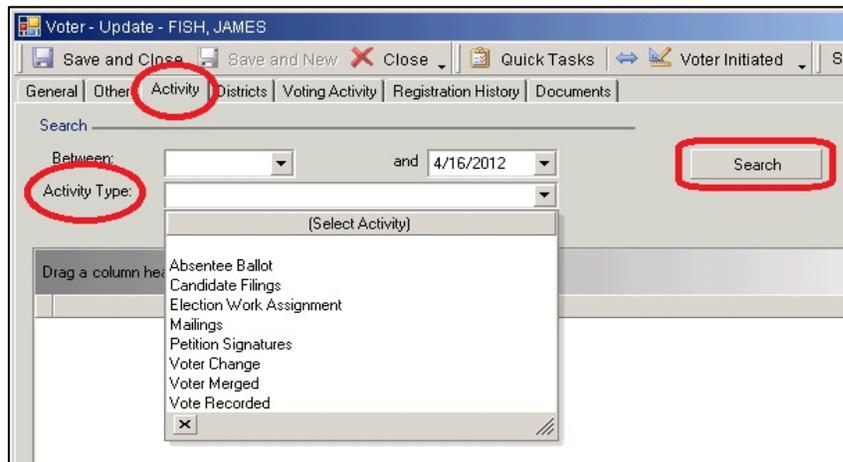


New Quick Tasks appear in the lower left pane when a record is selected.

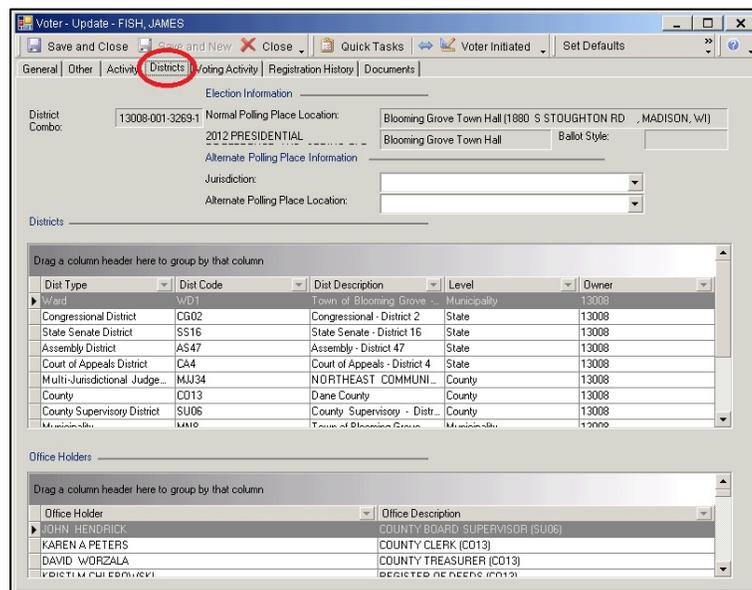
- b. The **General** tab displays information including voter name and address, voter registration number, date of birth, identification information, district combo number, registration date and status, and the date of any recent activity for the record.

- c. Additional tabs:
 - i. On the **Other** tab the **Proof of Residence (POR)** fields are included. The Voter's POR information is populated from their approved application **POR Type**, **POR Account #**, **POR Entity** fields. The **POR Required** field will default to "No" for those applications processed with POR.
 - ii. The **Other** tab also contains the **Identity Check** fields. These show information on HAVA Checks conducted with the Department of Transportation and Social Security Administration.

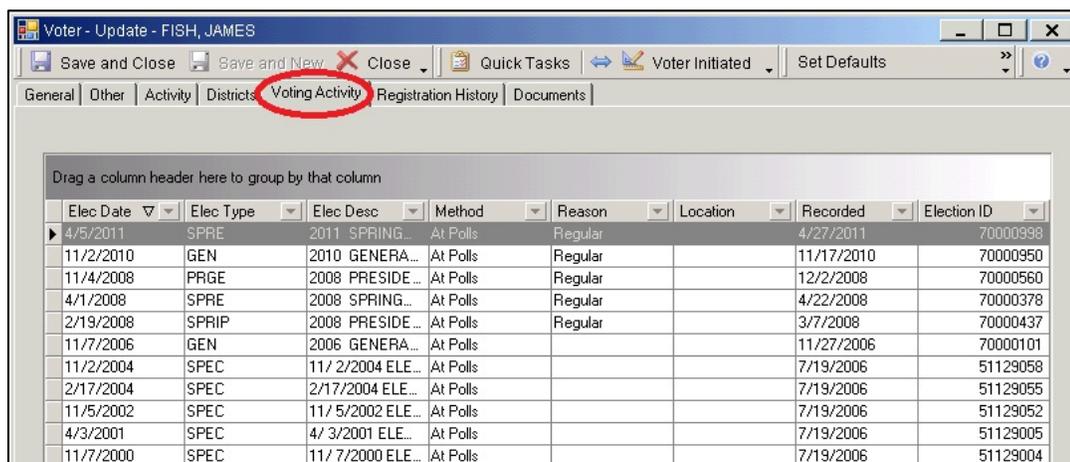
- iii. The **Activity** tab shows any activity that occurs in SVRS for a voter record. Select the **Activity Type** from the drop-down menu, and click on the **Search** button. For example, you can select **Mailings** to see if the voter has been sent a letter or postcard, or select **Voter Merged** to see if this record has been merged with a duplicate record.



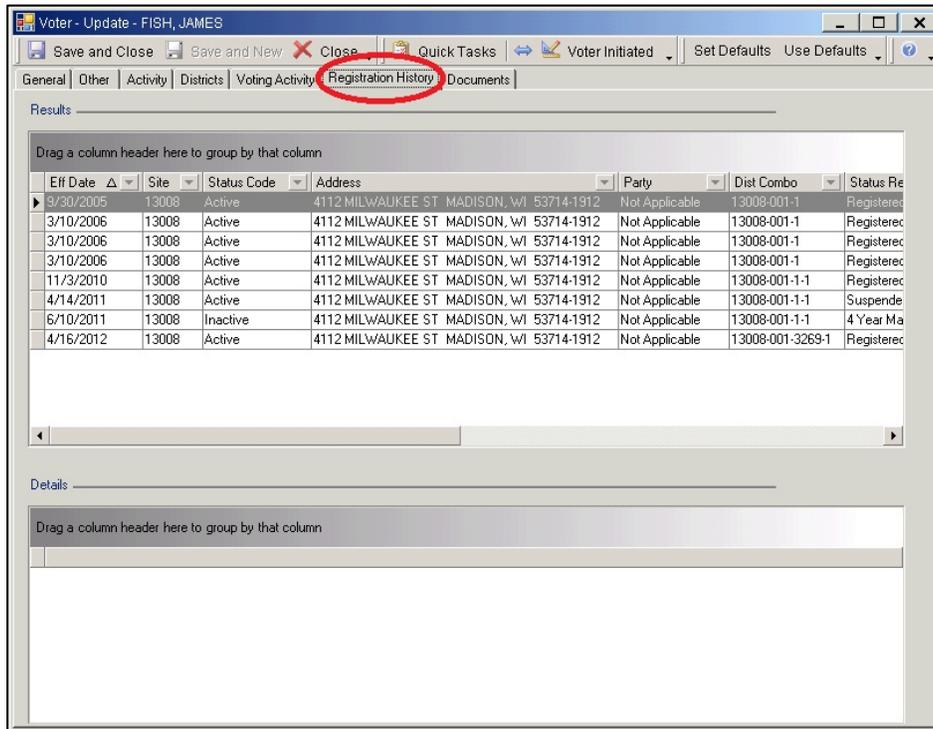
Under **Districts** you will find the voter's district information, including district combination and normal polling place. Also included is information on the school district to which they belong, county supervisory district, sanitary district, etc. **Office Holders** are also listed in the lower grid if that information is recorded in SVRS.



- iv. The **Voting Activity** tab lists the elections in which the voter participated. Some municipalities have many years of voter history uploaded in the initial conversion process. Other municipalities will have voter history beginning with the use of SVRS.



- v. The **Registration History** tab shows an entry for each change in the voter registration of the voter record. If you select an entry from the data grid, additional information is displayed in the lower **Details** grid.



- vi. The **Documents** tab will not be used in Wisconsin.

Correct Typographical Errors or Add Missing Voter Information



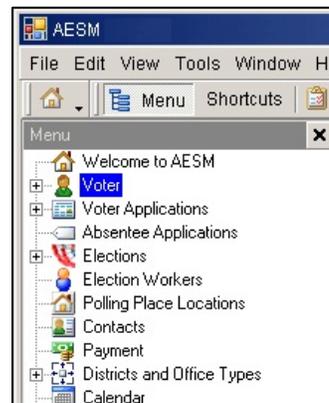
Clerks may need to correct typographical or administrative errors. Clerks may also collect other missing voter information or updates such as: telephone numbers or email address, or an accommodation needed at a poll location. These entries do not need a new GAB-131, but any changes in voter name or voter home address do require a new GAB-131 and proof of residence (POR), except for military and permanent overseas voters who are not required to provide POR.



For instructions on updating a voter's record from a GAB-131 (e.g. an address or name change), please see the [Voter Application](#) chapter.

For instructions specifically on updating POR information (only for those applications entered into SVRS without POR prior to the April 4, 2014 legislative change), please see the [Edit Proof of Residence](#) section of this chapter.

1. Click on the **Voter** node from the Main menu.
2. **Search** for and open a voter record using the search panel. See the previous [Search for Voter Information](#) section for details.
3. **Enter** the correct information or add the missing information.



- a. Fields that may be updated are: **Name, Home Address, Mailing Address, Date of Birth, Driver's License, Soc Sec Number, Phone, Status Reason, Status Comment, and Date Registered.**

- b. Click on the **Save and Close** button to save the changes to the voter record.

(i) If a voter has a name change, or moves to a new address, a new GAB-131 should be filled out and processed. Proof of residence is required and entered into SVRS. Also see the [Voter Application](#) chapter.

Change Voter Status to Inactive or Cancelled



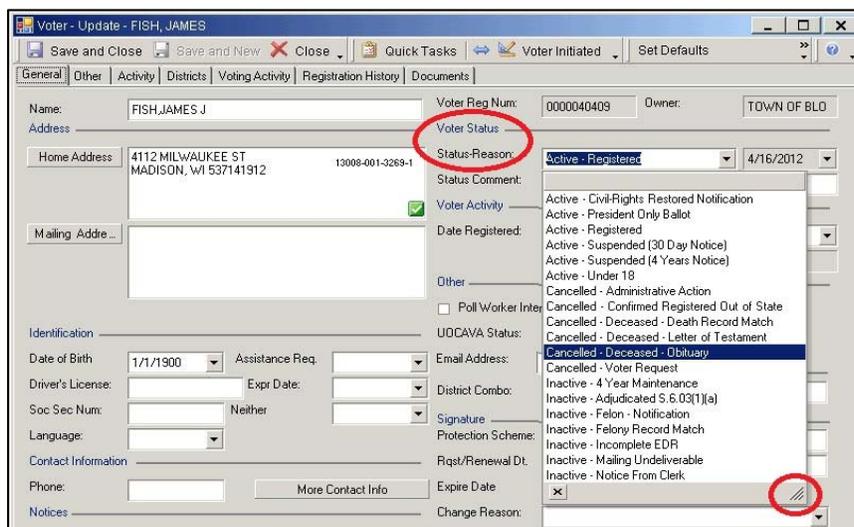
For various reasons, a clerk may need to change the status of a voter. A few common reasons are:

- You may inactivate or cancel voters based on Felony or Death Record Matches in the Voter Match node of SVRS. For more information, see the [HAVA Interfaces](#) chapter
- Felons still on supervision are changed to Inactive to prevent the voters' names from appearing on the poll book. Inactive voter records do not show up on the poll books
- To cancel the record of a deceased voter, clerks will need to change the Voter Status by selecting the Cancelled – Deceased option that best explains how it was learned that the voter is deceased. Cancelled voter records do not show up on the poll books
- To record voter participation after an election, a clerk may have processed an incomplete voter application. After processing the application, the clerk needs to change the voter's status to Inactive-Incomplete EDR until the voter has provided the necessary information
- A clerk may also inactivate a voter if the voter verification card was returned as undeliverable because the voter does not live at that address
- Certain records are automatically inactivated by SVRS during the 4 Year Maintenance of non-participating voters. In rare cases, voters may need to be reactivated



After cancelling or inactivating a voter's SVRS record, you should pull the associated GAB-131 from the files and mark it for destruction in four years. Providers need to communicate these updates to their Reliers, who retain the original GAB-131s. In addition, check to see if any cancelled or inactivated records have an Absentee Application associated with them. If so, the Absentee Application must be cancelled as well. If you use SVRS to issue absentee ballots, this will happen automatically. See the [Absentee Applications](#) chapter for more information.

1. Click on the **Voter** node from the Main menu.
2. **Search** for and **open** a voter record using the search panel. See the previous [Search for Voter Information](#) section for more information.
3. **Change Voter Status.**
 - a. Locate the **Voter Status** section of voter record (on the **General** tab).
 - b. Use the drop-down menu in the **Status – Reason** field for options. Expand the menu by clicking and dragging the bottom right corner.
 - c. Select the appropriate **Status Reason**.
4. **Save and Close** the voter record.

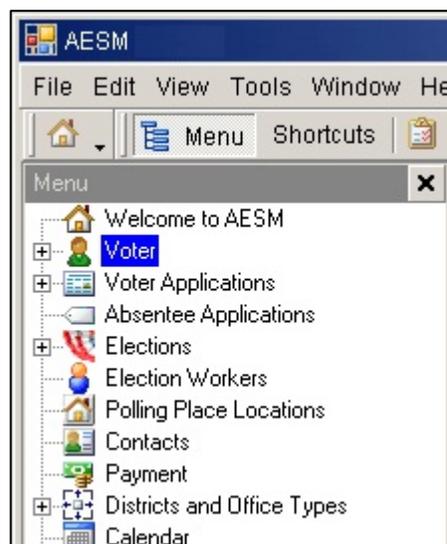


Add UOCAVA Status Indicators



In compliance with the Uniform Overseas Citizens Absentee Voting Act (**UOCAVA**) and the Military and Overseas Voter Empowerment (**MOVE**) Act, an **UOCAVA Status field drop-down** was added to the voter record in order to track military and overseas absentee electors in SVRS. Military and Overseas absentee electors are exempt from all Photo ID requirements. Therefore, when either the military or overseas status is selected from the UOCAVA drop-down list, the Photo ID Exempt checkbox is automatically selected.

1. Click on the **Voter** node from the Main menu.
2. **Search** for and open a voter record using the search panel. See the previous [Search for Voter Information](#) section for details.



3. **Select the UOCAVA Status.**
 - a. Click on the **UOCAVA Status drop-down list** and select Military or Overseas.
 - b. When the military or overseas status is selected from the **UOCAVA Status drop-down list**, the Photo ID exempt checkbox is automatically selected because military and overseas absentee electors are exempt from all Photo ID requirements.

4. Click **Save and Close**.

Make a Voter Confidential



Marking a voter record confidential will prevent that voter's information from appearing on poll lists, walking lists, and the MyVote 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 get 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 residential shelter. After the voter has presented this documentation, the clerk should issue the GAB-148 (confidential elector identification card), and assign a confidential elector number. Only clerks may assign a voter confidential status.

1. Click on the **Voter** node from the Main menu.
2. **Search** for and open a voter record using the search panel. See the previous Search for Voter Information section for details.
3. **Make the record Confidential.**

- a. Locate the **Signature** area in the lower right-hand corner of the data entry form.
- b. Choose **Confidential Voter** from the **Protection Scheme** drop-down menu.
- c. Enter the **Confidential ID #**, which consists of the Active Jurisdiction's HINDI number and a sequential number tracked by the jurisdiction itself (e.g. 13008-1).
- d. Enter the expiration date, regardless of the type of documentation, in the **Expire Date** field.



By entering the date in the **Expire Date** field, the date will appear in a mailing the clerk is required to send notifying the voter that the confidential status will be ending.



By selecting the **Confidential Voter** drop-down, **Photo ID Exempt** box is automatically checked.

- e. The **Change Reason** field is only used when the status expires early. Selecting anything from this drop-down will remove the voter from confidential status.

4. **Save and Close** the voter record.

Validate Voter Address



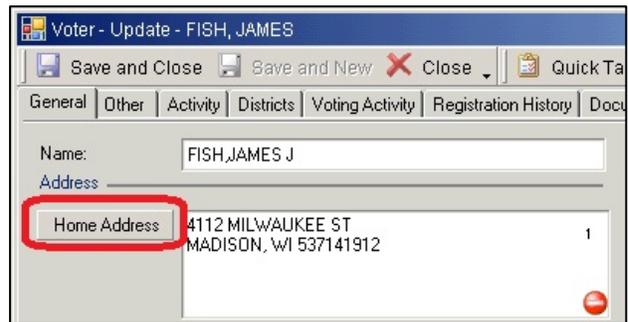
Only voters with validated addresses will appear on poll lists. If an address will not validate, it means that no address range in your municipality includes the address as it is listed in the voter record. If an address won't validate because of a missing or incomplete address range, please see the Mapping chapter of this manual. Use the Voters with No District Combination report to identify voters with invalid addresses. See the Mapping chapter for directions on how to run that report.

SVRS requires a voter's address to be validated because a voter's address ties him or her to a particular district combination, which then determines which ballot will be given to the voter on Election Day.

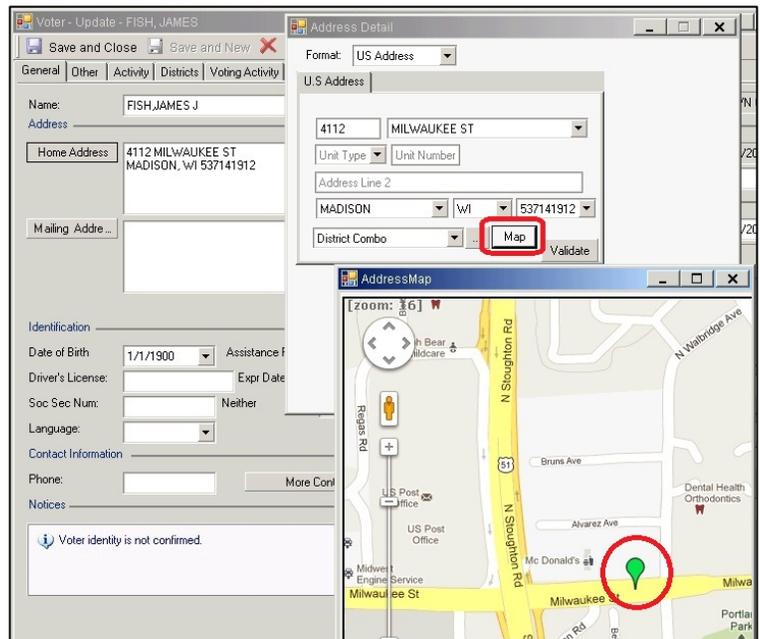
1. Click on the **Voter** node from the Main menu.
2. **Search** for and open a voter record using the search panel. See the previous [Search for Voter Information](#) section for details. If the address field has a red icon,  it is not validated, and needs to be fixed in order for the voter to show up on a poll book.

3. Validate voter address.

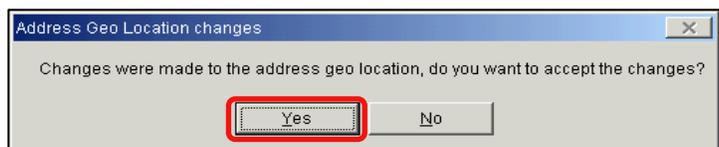
- a. Click the **Home Address** button to open up the **Address Detail** screen. Click the **Map** button to see a map of the voter's address.



- b. Use the map to pinpoint the address in the correct location. Click on the **Pin**  and drag and drop it to its correct position. (Even if the position looks correct, you should always move the Pin slightly to ensure that SVRS districts it properly). Once you have placed the Pin correctly, click the "X" in the upper right-hand corner of the map screen to close it.



- c. When you see the message below, click **"Yes."**



- d. Click **“OK.”**
Do not click the **“Validate”** button.

- e. You will then return to the Home Address fields. Do not hit the **TAB Key** to save the district combo. Instead either: click anywhere outside the Home Address fields – or - click the **Save and Close** buttons to exit out of the voter record.

- f. The district combo will save in the Home Address box. Make sure that the district combo assigned shows the correct ward and school district.



There is a green pencil icon in the lower right hand corner of the address field. The green pencil means that the address has been manually districted. In the past, we asked clerks not to use the green pencil, but now it is fine to use.



Also when you district one voter every voter at that address will be moved to the same district combo. This will not work for apartments or trailer parks, since each lot/unit has is a unique address.



If the map function does not work (because SVRS does not recognize the address), or you cannot find the correct location on the map, you can select the correct district combo from the drop-down on the **Address Detail** screen, and then, click the **OK** button -- do not click the **Validate** button.

Edit the Proof of Residence Field



The **ONLY** time the POR Required field should be marked **Yes** in the Voter node is when a first-time Wisconsin voter registered by mail prior to April 4, 2014 and did not attach any proof of residence.



With the April 4, 2014 legislative change, all voters (except military and permanent overseas voters) are required to show POR. When voter applications are processed with POR documentation recorded, the POR Required field will default to “No” on the Voter Record.

Voters with POR Required marked as Yes in their voter record will have a POR Required watermark to the left of the voter’s name on the poll book. This watermark alerts the poll worker to require proof of residence before giving the voter a ballot on Election Day. Poll workers should record the type and account number of the proof shown. After an election, clerks should review the poll book. When voters have provided proof of residence, the POR Required field must be cleared in SVRS, and the proof of residence information entered into each voter record. Voter records that are edited in this way will no longer have the POR Required watermark in future poll books.

1. Click on the **Voter** node from the Main menu.
2. **Search** for and open a voter record using the search panel. See the previous [Search for Voter Information](#) section for details.
3. Select the **Other** tab. Select the type of proof of residence from the drop-down list in the **POR Type**.



Corroborating Witness is no longer a valid **POR Type** option but it still remains on the drop-down list for tracking purposes.

4. Enter the Account Number in the **POR Acct #** field. If the account # is seven or more enter only 4 digits; if the account # is six or fewer enter 2 digits

5. Select **No** in the **POR Required** field.

6. Enter the **POR Entity**. This is name of the issuer of the proof of residence.



If the driver’s license was provided as proof of residence, enter or verify the **Driver License** number on the **General** tab. Then enter the last four digits on the **Other** tab. Be sure to change the **POR Required** to **No**.

7. **Save and Close** the voter record.

The screenshot shows the 'Other' tab of the voter record interface. The 'POR Type' dropdown menu is open, showing options like 'Bank Statement', 'Affidavit for Homeless Electors', 'Corroborating Witness', etc. The 'Other' tab is circled in red, and the 'POR Type' field is also circled in red.

The screenshot shows the 'Custom Fields' section of the voter record. The 'POR Type' is set to 'WI Drivers License or ID Card', the 'POR Acct#' is '3903', and the 'POR Required' field is set to 'No'.

Merge Duplicate Voter Records



If you find there are two or more records for one voter, you will want to merge those records into a single master record. The master record should be the one with the most current and complete registration information. A master record must always be located in your jurisdiction. You cannot merge a voter if the master record is in a different jurisdiction.



HAVA requires that we maintain one and only one record for each voter registered in Wisconsin. Due to multiple voter records in the source data at the beginning of SVRS, a voter may have duplicate records that need merging into a single record. A list of possible duplicate records is presented to you in the Voter Match node of SVRS. For further information on using the Voter Match node, see the [HAVA Interfaces](#) chapter.

1. Click on the **Voter** node from the Main menu.
2. Enter in your search criteria, and in the **In** drop-down list, select the **State of Wisconsin** (to see all records in the state). Use the **Search** button to locate them. See the [Search for Voter Information](#) section for more details.

3. **Merge Voter Records.**
 - a. First open and examine each duplicate voter record to verify which record is the most recent.
- Check the **Voter Status**, the **Application Date** on the **Other** tab, the **Date Last Voted**, **Date Registered**, and **Date Last Changed**. Check them all, do not rely on one single field.

- b. If the most recent record is in another municipality, that municipality must perform the merge. DO NOT perform the merge. If the **Voter Status** of the record in your municipality is still **Active**, open the record and make it **Inactive** so the voter no longer appears on the poll list.

- c. If the most recent record is in your municipality, go ahead and perform the merge. Highlight the first record by single clicking on it. Highlight the second by holding down the CTRL key while clicking on the additional record. Only 2 records can be merged at a time.

Name	Plac...	Party
HARTMAN, MICHAEL		Not Applicable
HARTMAN, MICHAEL A		Not Applicable
HARTMAN, MICHAEL A		Not Applicable
HARTMAN, MICHAEL A		Not Applicable
HARTMAN, MICHAEL D		Not Applicable
HARTMAN, MICHAEL G		Not Applicable
HARTMAN, MICHAEL G		Not Applicable
HARTMAN, MICHAEL J		Not Applicable
HARTMAN, MICHAEL J		Not Applicable
HARTMAN, MICHAEL J		Not Applicable
HARTMAN, MICHAEL J		Not Applicable
HARTMAN, MICHAEL J		Not Applicable
HARTMAN, MICHAEL J		Not Applicable
HARTMAN, MICHAEL JOHN		Not Applicable
HARTMAN, MICHAEL JOHN		Not Applicable
HARTMAN, MICHAEL L		Not Applicable
HARTMAN, MICHAEL L		Not Applicable

- d. Click on the **Merge Voters** Quick Task in the bottom left Quick Task panel.

- e. A new **Merge Voters** panel will replace the Main Menu and the **Quick Task** panel on the left. Determine which record will be the master record. The merged record will include voting history from both records, if present.

Select Master

Master Record	Name	Date Of Birth
<input type="radio"/>	FISH, GOLDIE	1/1/1900
<input checked="" type="radio"/>	FISH, GOLDIE	12/12/1945

Voter Details

Field Name	Field Data
First Name	GOLDIE
Last Name	FISH
Middle Name	
Date of Birth	12/12/1945 12:00:00...
Social Security N...	
Registration Date	4/4/1994 12:00:00...
Voter Registratio...	0700188010
Year Date Chang...	
Gender	
Driver's License	W111-1111-111...
Owner	
Address	3666 COUNTY...

Records Returned: 2 In TOWN OF BLOOMING GR... Search

Jurisdiction	Name	Date Of Birth	Place Of Bir...	Party
13008	FISH, GOLDIE	1/1/1900		Not Applicable
13008	FISH, GOLDIE	12/12/1945		Not Applicable



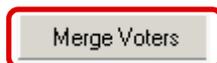
More information is displayed by clicking and dragging to the right the gray bar separating **Merge Voters** from the search panel.

- f. Information for the highlighted record will be displayed in the **Voter Details** grid. Select the **Master Record** using the radio button to the left of that record.

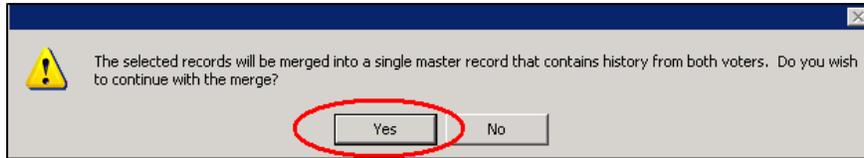


Information from the other record will be archived, but not necessarily show up in the merged record. For example, you may want to keep a middle name or initial or a Social Security number not present in the **Master Record**. Write down this information now, and add it into the **Master Record** after the merge.

- g. Click the **Merge Voters** button.



- h. A warning message will appear,
“The selected records will be merged... Do you wish to continue...?” Click **Yes**.



- i. A confirmation message will appear,
“The selected voters were successfully merged.” Click **OK**.



- j. The **Merge Voters** pane will automatically disappear and the Main Menu will reappear.

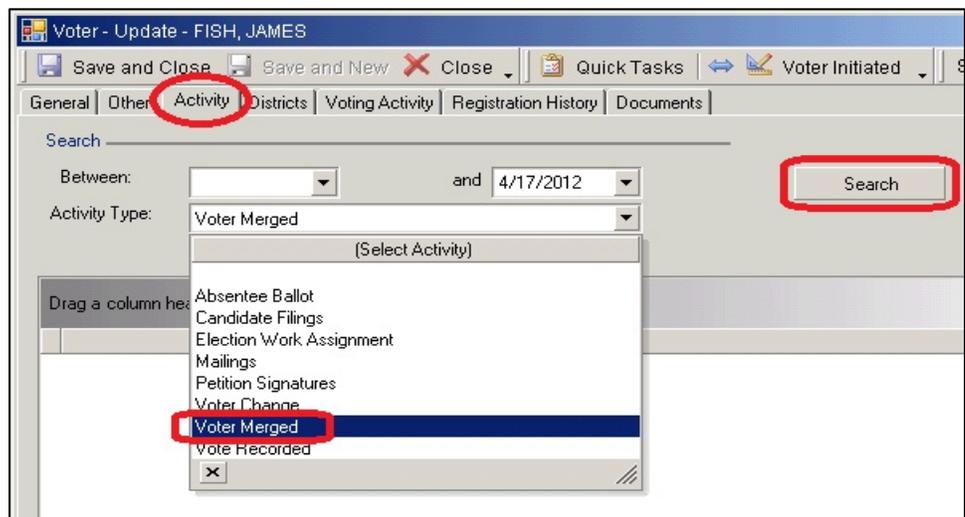
Unmerge Voter Records



If, after merging two voter records, it is determined that the records were not the same person, you can **Unmerge** the two combined records.

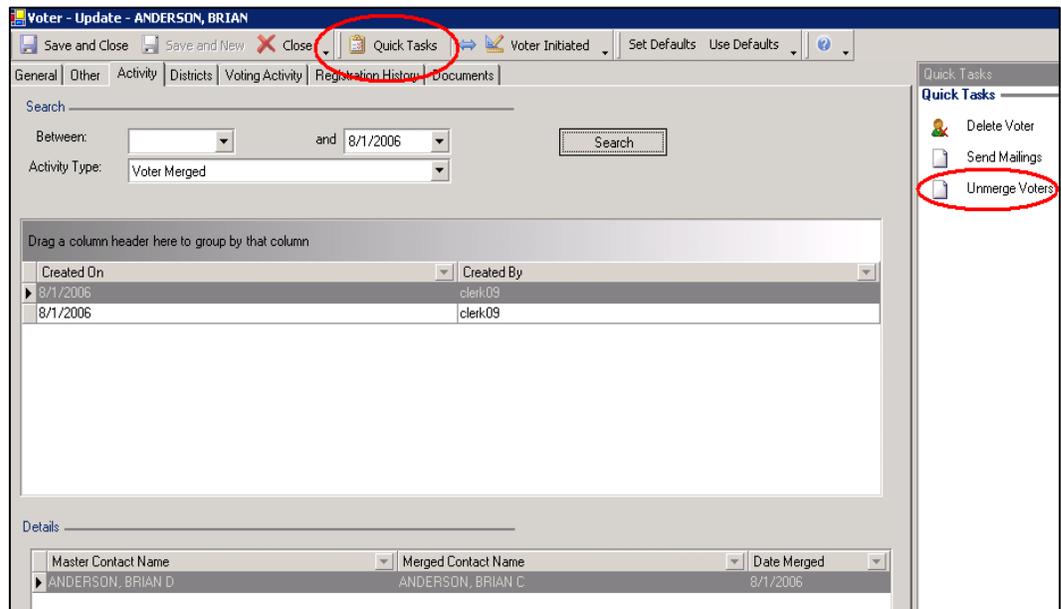
1. Click on the **Voter** node from the Main menu.
2. **Search** for the merged voter record using the search panel. See the previous [Search for Voter Information](#) section for details on searching.
3. Open the record by double-clicking on it.

4. Click on the **Activity** tab.
5. Under **Activity Type**, select **Voter Merged** from the drop-down box.
6. Click **Search**.

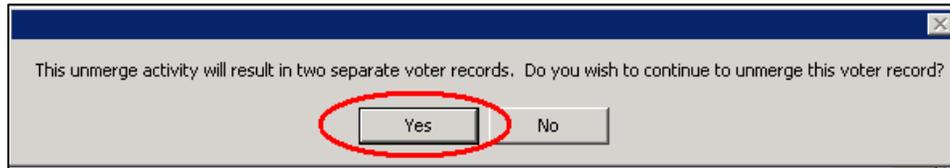


7. The date and details for the **Voter Merged** appear in the data grid. Click on the **Quick Tasks** and a list appears on the right.

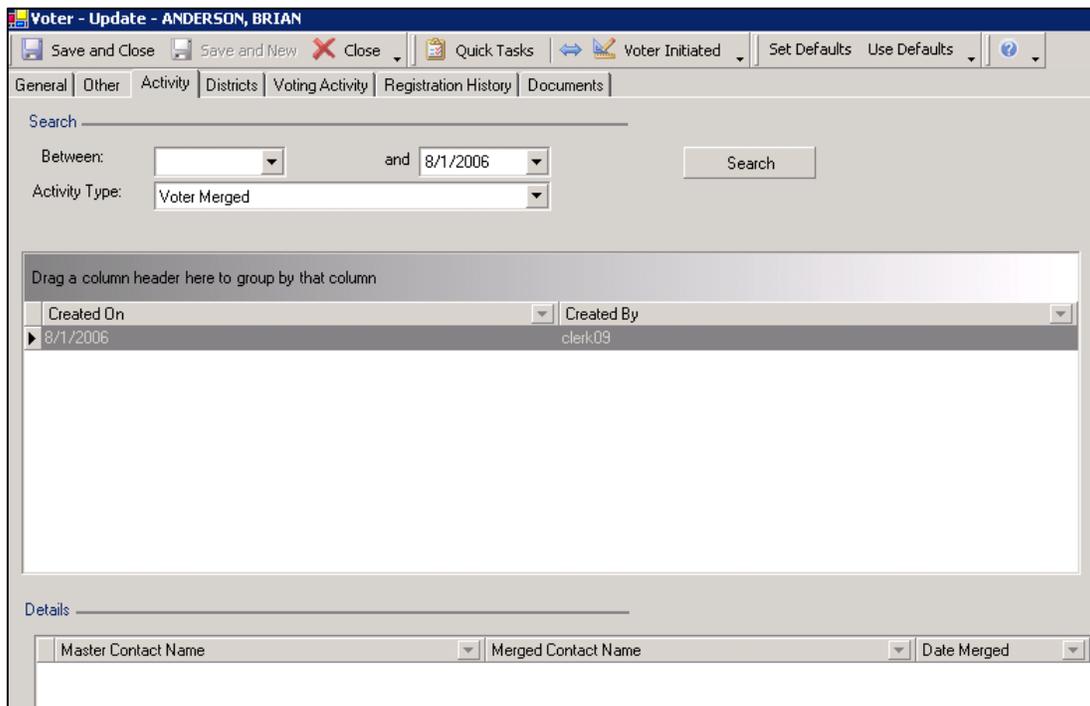
8. Click on the **Unmerge Voters** Quick Task.



- A confirmation box appears. Click **Yes** to **Unmerge** the voter records.



- The **Voter-Update** screen will refresh with only the original master record information visible.
- Click **Save and Close**.



You can perform the **Unmerge** steps above even if the **Master Record** is not in your jurisdiction. The unmerged voter records will return to their original jurisdictions. If the voter records belong to the same person, but were merged into the wrong municipality, perform the **Unmerge** steps above, then merge the records again, with the **Master Record** in the correct municipality.

Check Voter Transfers and Merged out Voters



The SVRS list of registered voters will continually change as voters move in and out of your jurisdiction. Regularly noting voter transfers and merges can prevent confusion at a later date, especially with absentee voters. The Voter Transfers node shows those voters that have moved to a new municipality and submitted a new registration application. The Merged Voter Information Report shows voters that have been removed from your municipality by the voter merge process described above.



After a voter moves out of your jurisdiction and registers elsewhere, you should pull the GAB-131 and place it in the destruction file. Mark the date of destruction (in 4 years) on the top of the GAB-131. Please note that records merged out of your municipality are often inactive. You only have to pull the GAB-131 if the merge pulls an active voter record out of your municipality.

Check Voter Transfers

1. Expand the plus sign (+) to the left of the **Voter** node in the Main menu.

2. Click to highlight the **Voter Transfers** sub-node.

3. In the **From Jurisdiction** box, type or select your municipality.

4. In the **Transfer App Date Between** fields, enter a beginning date equal to the day after you last checked for transfers. You can enter a cutoff date if you wish.

The screenshot shows the AESM software interface. The 'Menu' pane on the left has 'Voter Transfers' highlighted. The search criteria at the top include 'Transfer App Date Between' with '4/1/2012' and 'and' selected, and 'From Jurisdiction' set to 'TOWN OF BLOOMING GR...'. The 'Records Returned' section shows 36 records. The results grid below has columns for Transfer Status, Transfer Status Reason, From Jurisdiction, To Jurisdiction, Transfer App Date, and Approval Deadline. The grid contains 36 rows of data, all with 'Approved' status and various municipalities listed.

Transfer Status	Transfer Status Reason	From Jurisdiction	To Jurisdiction	Transfer App Date	Approval Deadline
Approved	Transfer Approved	TOWN OF BLO...	CITY OF MADIS...	4/9/2012	
Approved	Transfer Approved	TOWN OF BLO...	CITY OF LAKE...	6/13/2012	
Approved	Transfer Approved	TOWN OF BLO...	CITY OF FITCH...	5/11/2012	
Approved	Transfer Approved	TOWN OF BLO...	CITY OF MADIS...	5/31/2012	
Approved	Transfer Approved	TOWN OF BLO...	TOWN OF JANE...	6/21/2012	
Approved	Transfer Approved	TOWN OF BLO...	TOWN OF BEL...	4/4/2012	
Approved	Transfer Approved	TOWN OF BLO...	TOWN OF BEL...	4/4/2012	
Approved	Transfer Approved	TOWN OF BLO...	TOWN OF CR...	6/11/2012	
Approved	Transfer Approved	TOWN OF BLO...	VILLAGE OF CA...	5/4/2012	
Approved	Transfer Approved	TOWN OF BLO...	CITY OF RICE L...	6/6/2012	
Approved	Transfer Approved	TOWN OF BLO...	CITY OF MADIS...	4/9/2012	
Approved	Transfer Approved	TOWN OF BLO...	TOWN OF SUM...	5/17/2012	
Approved	Transfer Approved	TOWN OF BLO...	CITY OF LAKE...	6/7/2012	
Approved	Transfer Approved	TOWN OF BLO...	VILLAGE OF MC...	5/11/2012	
Approved	Transfer Approved	TOWN OF BLO...	CITY OF PORTA...	6/8/2012	
Approved	Transfer Approved	TOWN OF BLO...	CITY OF EDGE...	4/6/2012	
Approved	Transfer Approved	TOWN OF BLO...	TOWN OF WIND...	5/9/2012	
Approved	Transfer Approved	TOWN OF BLO...	CITY OF MADIS...	4/9/2012	
Approved	Transfer Approved	TOWN OF BLO...	CITY OF MADIS...	5/22/2012	
Approved	Transfer Approved	TOWN OF BLO...	VILLAGE OF CO...	6/1/2012	
Approved	Transfer Approved	TOWN OF BLO...	CITY OF MADIS...	5/23/2012	
Approved	Transfer Approved	TOWN OF BLO...	VILLAGE OF MA...	6/13/2012	
Approved	Transfer Approved	TOWN OF BLO...	TOWN OF WINN...	6/12/2012	



The results grid can hold 1,000 records. If there are more than 1,000 records, limit the dates of your search.

5. **Note** the names of the voters who have moved out of your jurisdiction. If you do not use SVRS to track absentee ballots, you will have to **Cancel** any absentee applications and/or absentee ballots that exist for these voters. **Mark** the GAB-131 for destruction in four year's time.

6. An alternate method for identifying voters who have transferred to another jurisdiction is to expand the **Voter Transfers** node and highlight the **Moved Out** node. This will only display voters who have transferred out in the past thirty days.

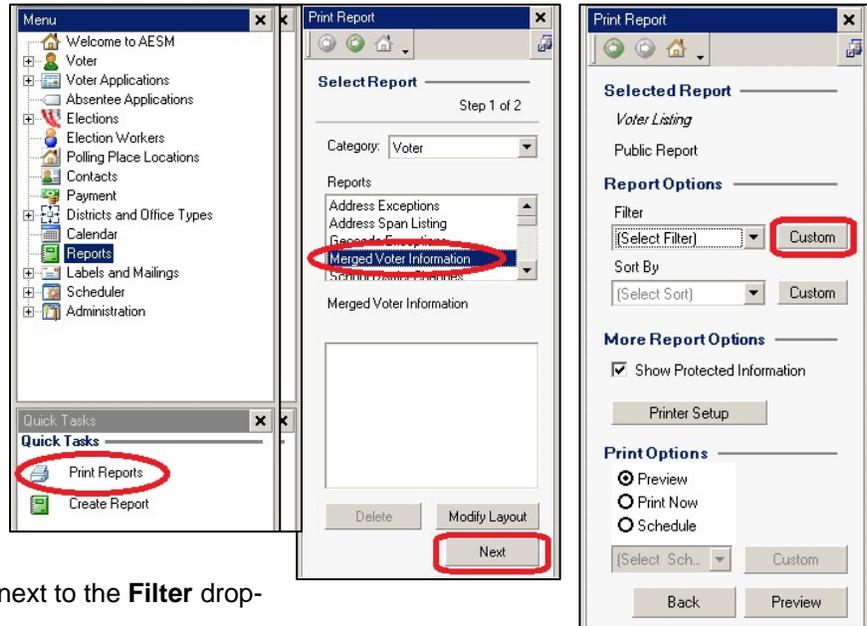


The names of the voters in the **Voter Transfers** node can be printed or copied and pasted into an excel spreadsheet. See the Reports chapter pg. 3 for information about working with a data grid.

The Merged Voter Information Report

This report can be generated from both the municipal and county jurisdictional levels in SVRS. If filtered properly, it will display any voter records that have been removed from your municipality through the merge process.

1. On the **Menu** tree, click the **Reports** node.
2. On the **Quick Tasks** pane, click **Print Reports**.
3. Leave the report **Category** set to **Voter**, and select **Merged Voter Information** from the list.
4. Click **Next**.
5. **Filter** your report.



- a. Click the **Custom** button next to the **Filter** drop-down list.
- b. Create a **Filter** that matches the one displayed. In the **Value** column, enter a date in mm/dd/yyyy format.

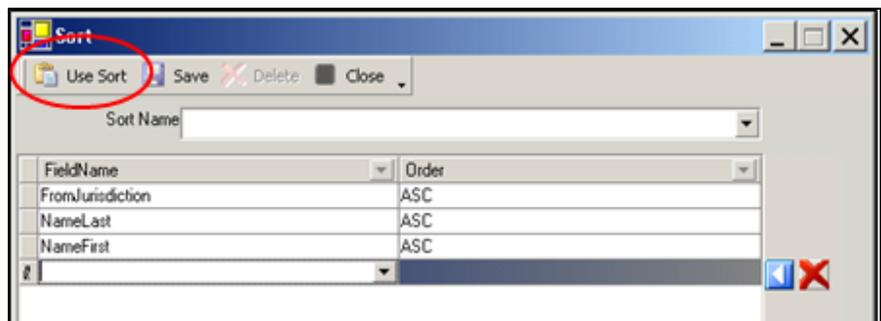
- c. (Optional) On the second line, enter **And; DateMerged; IsLessThan;** and a date in mm/dd/yyyy format if you wish to use a range of dates for your search.



- d. Click **Use Filter**.

For directions on how to save filters and sorts for future use, see the [Reports](#) chapter.

6. **Sort** your report.
 - a. Click the **Custom** button next to the **Sort By** drop-down list.
 - b. Copy the **Sort** displayed.
 - c. Click **Use Sort**.





Counties should use the field name **FromJurisdiction** on the first line in order to sort by municipality. Municipalities can omit this line if desired.

7. Click the **Printer Setup** button and verify that your printer settings are correct. Once they are correct, click **Save Settings**.
8. Click the **Print Now** radio button.
9. Click the **Print** button.
10. The **Print or Export is Complete!** dialog box will open. Click **OK**.



For further information on printing and exporting a report, see the [Reports](#) chapter.

A sample of the **Merged Voter Information** report is shown below.



The **Old Status** and **Old Address** information matches the **From Jurisdiction**, and the **Status Reason** and **New Address** information matches the **To Jurisdiction**. If the **Old Status** is **Active**, you need to pull your hard copy of the GAB-131 and mark it for destruction in four years. You must also cancel absentee applications if you do not use SVRS to track absentee ballots. If the **Old Status** is **Inactive**, those actions should already have been completed.



If the **Old Status** is **Active**, and there is an **Inactive Status Reason** like **Mailing Undeliverable** or **Notice From Clerk**, or a **Cancelled Status Reason** like **Deceased** or **Administrative Action**, your active record has been merged into an inactive or cancelled record in another municipality. You may need to undo the merge. See the [Unmerge Voter](#) section in this chapter, or contact the GAB Help Desk for assistance.

CITY OF MADISON		Merged Voter Information							RPTView_WI_MergedVoter_Information 9/26/2008 10:01:42 AM	
<i>(1 = 1 AND (RPTView_WI_MergedVoter_Information.DateMerged > '08/01/2008') AND (RPTView_WI_MergedVoter_Information.DateMerged < '09/30/2008'))</i>										
To Jurisdiction	Merged Date	Old Status	LastName, FirstName	VoterRegNum	DateOfBirth	Drivers License	Old Address	New Address		
TOWN OF DUNN - 13028	8/25/2008	Inactive	ABEL, EDWARD	0000049000	1/1/1900	A000-0000-0000-00	3521 MARCY RD	4125 LOOKOUT TRL		
From Jurisdiction		Status Reason								
CITY OF MADISON - 13251		Registered								
<hr/>										
To Jurisdiction	Merged Date	Old Status	LastName, FirstName	VoterRegNum	DateOfBirth	Drivers License	Old Address	New Address		
CITY OF FITCHBURG - 13225	9/15/2008	Inactive	ABERLE, JAMES	0000178007	1/1/1900		2681 MILWAUKEE ST	4781 E CLAYTON RD		
From Jurisdiction		Status Reason								
CITY OF MADISON - 13251		Registered								
						SSA	MADISON	FITCHBURG		
							WI - 53704	WI - 53711		

The Voter Listing Report

This report returns a list of registered voters, regardless of status. This report can be generated from both the municipal and county jurisdictional levels in SVRS. The basic report will show only voters' names, addresses and voter registration numbers, but it can be modified to include information like driver's license, date of birth, or a voter's district combination.

For more information on modifying a report, see the [Reports](#) chapter.

1. On the Main Menu tree, click the **Reports** node.
2. On the **Quick Tasks** pane, click **Print Reports**.
3. Leave the report **Category** set to **Voter**, and under **Reports**, select **Voter Listing**.
4. Click **Next**.
5. **Filter** your report:
 - a. Click the **Custom** button next to the **Filter** drop-down list.
 - b. Copy the **Filter** displayed. This filter will produce a list of all **Active** voters in your jurisdiction.

And/Or	Field Name	Condition	Value
And	Status Code	Equals	ACTIV*



To filter for **Inactive** voters, use **INACT*** under the **Value** column.
 To filter for **Cancelled** voters, use **CANC*** under the **Value** column.

- c. Click **Use Filter**.

Other Options for Filtering the Voter Listing Report:



The Voter Listing report will also allow you to filter by a district the voter lives in. In the example below, **Ward** has been selected. The user can then select from the listed wards in the **Value** column. The filter below will produce a report of all active voters in the **Ward** selected.

The screenshot shows the FilterForm application window. At the top, there is a menu bar with 'Use Filter', 'Save', 'Save As', 'Delete', 'Clear', and 'Close'. Below the menu is a 'Filter Name' dropdown. The main area contains a table with the following data:

And/Or	Field Name	Condition	Value
And	Status Code	Equals	ACTIV*
I And	Ward	Equals	[Dropdown menu open showing: City of Bayfield - Ward 4 (178), City of Bayfield - Ward 3 (177), City of Bayfield - Ward 2 (176), City of Bayfield - Ward 1 (175)]
*			



The filter below uses the **And(, Or, and)** functions to filter for multiple districts. It will return a list of **Active** voters for Wards 4, 5, and 6. Please note that on the final line of the filter, something must be entered after the **)**, or closing parenthesis. However, anything entered after the closing parenthesis is just a placeholder, and will not affect the filter.

The screenshot shows the FilterForm application window with a more complex filter rule. The table contains the following data:

And/Or	Field Name	Condition	Value
And	Status Code	Equals	ACTIV*
And(Ward	Equals	City of Kiel - Ward 4 (2642)
Or	Ward	Equals	City of Kiel - Ward 5 (2643)
Or	Ward	Equals	City of Kiel - Ward 6 (2644)
)	Status Code	Equals	ACTIV*
*			

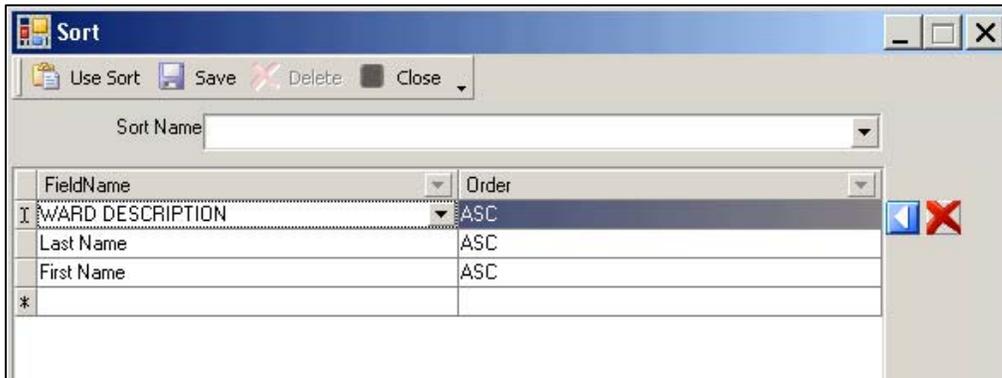


You may filter for any of the districts listed below, although you may not see every district in the drop-down in your municipality (if you do not have a district type, nothing will appear in the drop-down list).

Aldermanic District	Lake Management District
Assembly District	Multi-Jurisdictional Judge District
Circuit Court District	Municipality
Common School District	Public Inland Lake Protection District
Congressional District	Sanitary District
County	State Senate District
County Supervisory District	Technical College District
Court of Appeals District	Unified School District
District Attorney	Union High School District
First Class School District	Ward

6. **Sort** your report:

- a. Click the **Custom** button next to the **Sort By** drop-down list.
- b. Copy the **Sort** displayed. This sort will group voters into wards, then put them in alphabetical order by name. If you want your entire report sorted by the voters' names, leave out the first line. Counties may want to substitute **MUNICIPALITY DESCRIPTION** (municipality) or **JurisdictionID** under **Field Name** on the first line. This will group voters into municipalities before putting them in order by name.



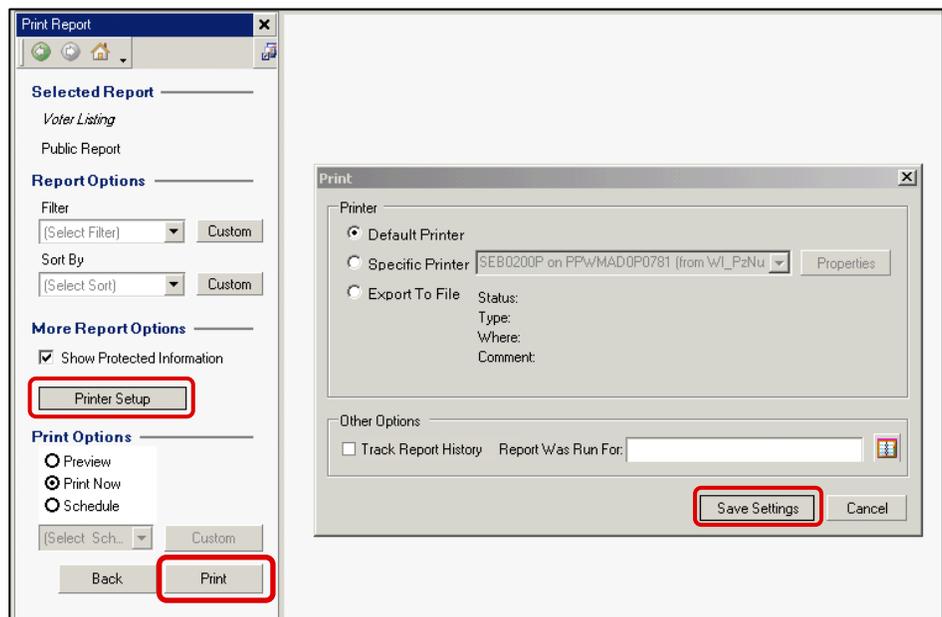
- c. Click **Use Sort**.

 For more information on customizing and saving filters and sorts, and methods of printing or exporting files, see the [Reports](#) chapter.

7. Click the **Printer Setup** button and verify that your printer settings are correct. Once they are correct, click **Save Settings**.

8. Click the **Print Now** radio button.

9. Click the **Print** button.



10. The **Printing Notification** dialog box will open. Click **OK**.





A sample of the Voter Listing report is displayed below. Because there is limited information displayed for each voter, you may want to use the **Modify Layout** button to add columns of information to your report. You may add a column for:

- District Combo Code
- Voter Mailing Address (several fields)
- Voter Status (**Status Code**)
- Date Registered
- POR Required
- Date of Birth
- Driver's License Number (**Gov ID Num**)
- Social Security Number
- Districts (several fields)



Remember that a report with confidential information like **Date of Birth**, **Driver's License Number**, and **Social Security Number** cannot be shared with the public. For further information on modifying a report, see the Reports chapter.

CITY OF KIEL		00000-VOT-001-C	
		8/29/2009 9:59:38 PM	
Voter Listing			
(1=1 AND (RPTView_AESM_VoterListing2.[Status Code] LIKE 'ACTIV%'))			
Voter Reg	Voter Name	Voter Address	
0705348870	ABRASHINSKY, AMANDA MARIE	629 FREMONT ST	KIEL, WI 53042
0707961770	ADAMS, ANNE M	458 CLAY ST	KIEL, WI 53042
0710027130	ADAMS, ERICK JAMES	458 CLAY ST	KIEL, WI 53042
0707963110	ADE, MICHAEL ALAN	26 NORTH ST	KIEL, WI 53042
0706487470	ALBRECHT, HARLAN	1222 KRISTEL HEIGHTS ST	KIEL, WI 53042
0707965600	ALBRECHT, KAY LYNN	813 4TH ST	KIEL, WI 53042
0706487900	ALBRECHT, LAVERNE ADELAIDE	1222 KRISTEL HEIGHTS ST	KIEL, WI 53042
0703198250	ALLCOX, BETH ANN	707 ADAMS ST	KIEL, WI 53042
0710027360	ALLMAN, BARBARA JEANETTA	65 RIVERVIEW RD	KIEL, WI 53042



There are similar reports available which may be of use. The filters and sorts above may help you run these reports. If you still have questions about them, contact the GAB Help Desk.

- Voter Listing with Districts displays the various districts the voters live in after their names
- The Walking List report, under the **Elections Category**, organizes voters by street name. It includes a useful field unavailable in other reports called **Date Last Voted**, so you can see how recently someone voted

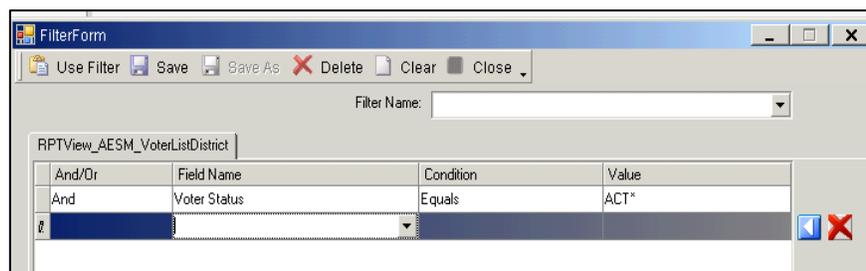
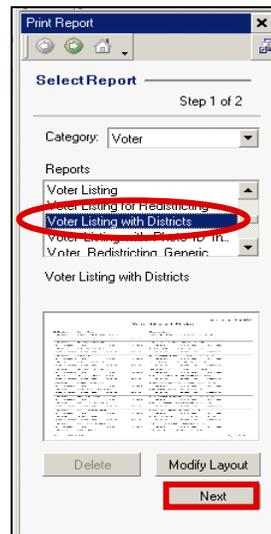
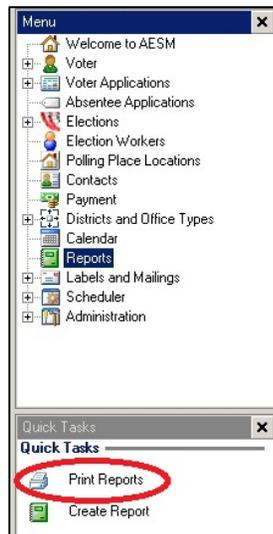
The Voter Listing with Districts Report

This report returns a list of registered voters and their voting districts, regardless of status. This report can be generated from both the municipal and county jurisdictional levels in SVRS. The basic report will show voters' names, voter's addresses and the following voting districts:

- Ward
- Congressional
- Senate
- Court of Appeals
- Multi Jurisdictional Judge
- County Supervisory
- Aldermanic
- Common School District
- Union School District
- Unified School District
- Sanitary

The report can be modified to include information like whether proof of residence (**POR**) is required. For more information on modifying a report, see the Reports chapter.

1. On the Main Menu tree, click the **Reports** node.
2. On the **Quick Tasks** pane, click **Print Reports**.
3. Leave the report **Category** set to **Voter**, and under Reports, select **Voter Listing with Districts**
4. Click **Next**.
5. **Filter** your report:
 - a. Click the **Custom** button next to the **Filter** drop-down list.
 - b. Copy the Filter displayed. This filter will produce a list of all Active voters in your jurisdiction
 - c. Click **Use Filter**.



Other Options for Filtering the Voter Listing with Districts Report



The Voter Listing with Districts report will also allow you to filter by whether a voter is required to provide Proof of Residence (**POR**). The filter below will produce a report of all active voters who must provide **POR**. (To filter for those voters who do have to provide **POR**, use NO under the Value column.)

The screenshot shows a window titled "FilterForm" with a menu bar containing "Use Filter", "Save", "Save As", "Delete", "Clear", and "Close". Below the menu is a "Filter Name:" dropdown. The main area is titled "RPTView_AESM_VoterListDistrict" and contains a table with the following data:

And/Or	Field Name	Condition	Value
And	Voter Status	Equals	ACT*
And	PORRequired	Equals	YES



In addition, the Voter Listing with Districts report can be filtered to show voters exempted from providing Photo ID. The filter below will produce a report of all active voters who are exempt from showing Photo ID at the polls. (To filter for those voters who are not exempt, use False under the Value column.)

The screenshot shows a window titled "FilterForm" with a menu bar containing "Use Filter", "Save", "Save As", "Delete", "Clear", and "Close". Below the menu is a "Filter Name:" dropdown. The main area is titled "RPTView_AESM_VoterListDistrict" and contains a table with the following data:

And/Or	Field Name	Condition	Value
And	Voter Status	Equals	ACT*
And	photolDExempt	Equals	True



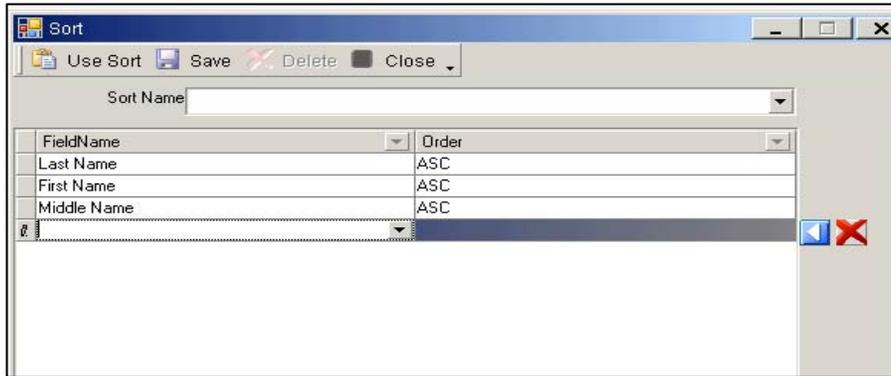
The Voter Listing with Districts report can also be filtered to show voters who provided a Photo ID. The filter below will produce a report of all active voters who provided Photo ID. (To filter for those voters who did not provide Photo ID, use False under the Value column.)

The screenshot shows a window titled "FilterForm" with a menu bar containing "Use Filter", "Save", "Save As", "Delete", "Clear", and "Close". Below the menu is a "Filter Name:" dropdown. The main area is titled "RPTView_AESM_VoterListDistrict" and contains a table with the following data:

And/Or	Field Name	Condition	Value
And	Voter Status	Equals	ACT*
And	photolDProvided	Equals	True

6. **Sort** your report:

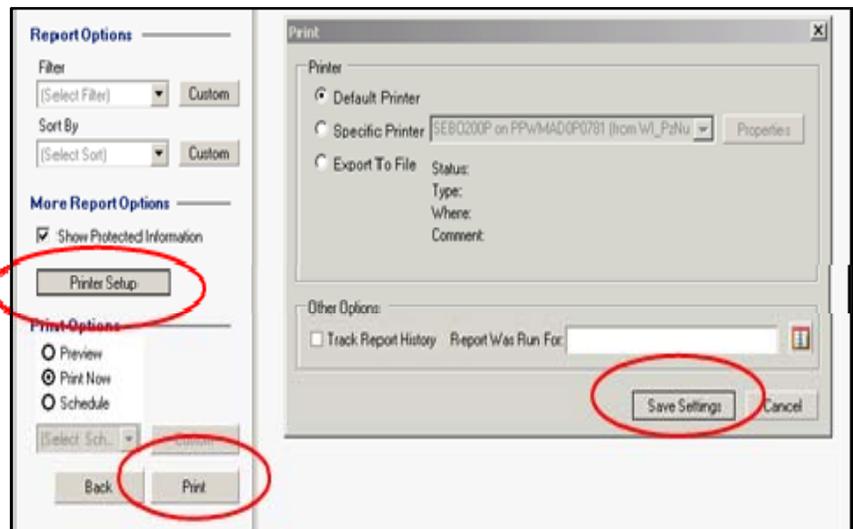
- a. Click the **Custom** button next to the **Sort By** drop-down list.
- b. Copy the Sort displayed below. This sort will group voters by last, first, and middle name.



- c. Click **Use Sort**.

i For more information on customizing and saving filters and sorts, and methods of printing or exporting files, see the Reports chapter.

- 7. Click the **Printer Setup** button and verify that your printer settings are correct. Once they are correct, click **Save Settings**.
- 8. Click the **Print Now** radio button.
- 9. Click the Print button.



- 10. The **Printing Notification** dialog box will open. Click **OK**.



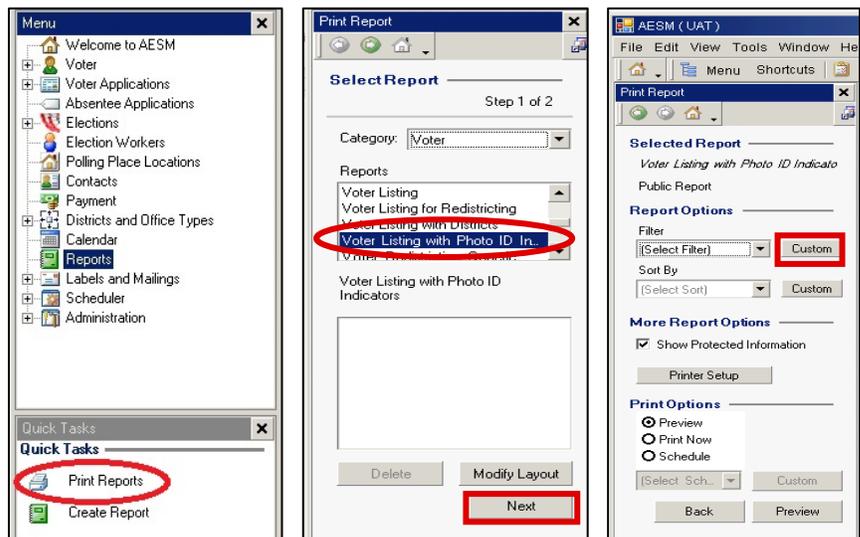
 See **page 34** for a sample Voter Listing with Districts Report

The Voter Listing with Photo ID Indicators Report

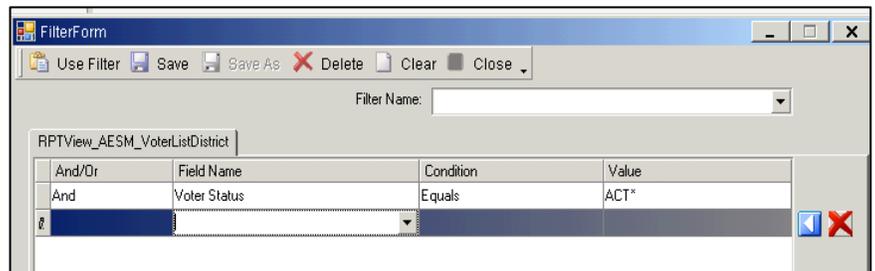
This report returns a list of registered voters and indicates whether the voters must provide Photo ID or are exempt from providing Photo ID. This report can be generated from both the municipal and county jurisdictional levels in SVRS. The basic report will show the following for each voter:

- Registration number
- Name and address
- District Combo
- Ward
- School District
- Uniformed Overseas Citizens Absentee Voting Act (**UOCAVA**) status
- Proof of Residence (**POR**) status
- ID Provided status
- ID Exempt status

1. On the Main Menu tree, click the **Reports** node.
2. On the **Quick Tasks** pane, click **Print Reports**.
3. Leave the report **Category** set to **Voter**, and under **Reports**, select **Voter Listing with Photo ID Indicators**.
4. Click **Next**.



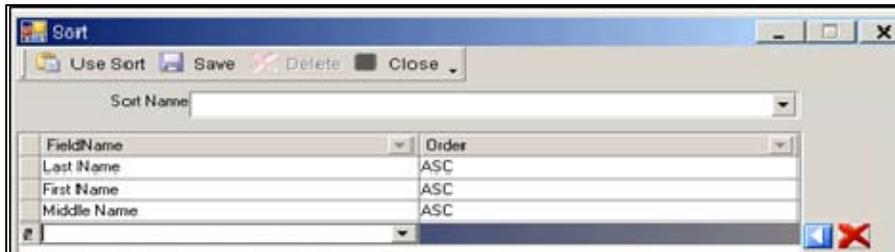
5. **Filter** your report:
 - a. Click the **Custom** button next to the **Filter** drop-down list.
 - b. Copy the Filter displayed. This filter will produce a list of all Active voters in your jurisdiction.
 - c. Click **Use Filter**.



More filters options are found on page 30 - Other Options for Filtering The Voting Listing with District Report, These can also be used for The Voter Listing with Photo ID Indicators Report.

6. **Sort** your report:

- a. Click the Custom button next to the **Sort By** drop-down list.
- b. Copy the Sort displayed below. This sort will group voters by last, first, and middle name.



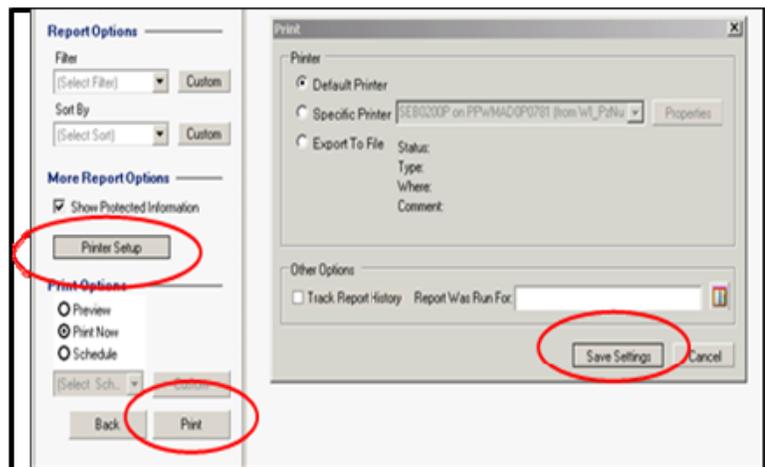
- c. Click **Use Sort**.

 For more information on customizing and saving filters and sorts, and methods of printing or exporting files, see the Reports chapter.

7. Click the **Printer Setup** button and verify that your printer settings are correct. Once they are correct, click **Save Settings**.

8. Click the **Print Now** radio button

9. Click the **Print** button.



10. The Printing Notification dialog box will open. Click **OK**.



See **page 34** for a sample Voter Listing with Photo ID Indicators Report.



A sample of the Voter Listing with Districts Report is displayed below.

CITY OF MADISON		0000-VOT-019-C												
		4/20/2012 3:05:09 PM												
Voter Listing with Districts														
(1=1 AND (RPTView_AESM_VoterListDistrict.[Last Name] = 'APPLES'))														
CITY OF MADISON - 13251														
Voter Reg	Voter Name	Voter Address	WARD	CONG	SEN	ASSM	COA	MJJ	COSUP	ALD	Comm	Union	Unified	Sani
0712239180	APPLES, DEE	132 W WILSON ST MADISON, WI 537033214	WD052	CG02	SS26	AS76	CA4		SU01	AL4			3269	
0712239170	APPLES, PEACH	132 E WILSON ST MADISON, WI 537033476	WD052	CG02	SS26	AS76	CA4		SU01	AL4			3269	
Voter Count:			2											



A sample of the Voter Listing with Photo ID Indicators Report is displayed below.

CITY OF MADISON		0000-VOT-019-C									
		4/20/2012 3:00:51 PM									
Voter Listing with Photo ID Indicators											
(1=1 AND (RPTView_WI_VoterListPhotoID.[Last Name] = 'APPLES'))											
Voter Reg	Voter Name	Voter Address	District Combo	Ward	School District	Sanitary District	UOCAVA Status	POR Required	ID Provided	ID Exempt	
0712239180	APPLES, DEE	132 W WILSON ST MADISON, WI 537033214	13251-052-3269-1	WD052	MADISON METROPOLITAN				YES		
0712239170	APPLES, PEACH	132 E WILSON ST MADISON, WI 537033476	13251-052-3269-1	WD052	MADISON METROPOLITAN		MIL			YES	