

Table of Contents

Manage HAVA Checks	2
Generate the WI HAVA Check Report	2
Fix a Data Entry Error and Rerun the HAVA Check from the Voter Node	4
Send the WI DMV Ping Notification Letter	5
Respond to WI DMV Ping Notification Letter Recipients	6
The Voter Match Node.....	7
The WI Voter Match Report	8
Death Matching.....	9
Search for Potential Matches	9
Manage Search Results	10
Felon Matching.....	11
Manage Felon Matches	11
Generate the WI Felon Ineligible Notification Letter.....	13
Duplicate Voter Matching.....	16
Merge Duplicate Records	16
Search for Remaining Matches in the Voter Matches Node	18
Manage Search Results	19

Manage HAVA Checks



When you perform a HAVA Check on a voter application, the results are not real-time. Instead, SVRS communicates with the WI Department of Transportation (DOT) and Social Security Administration (SSA) on a nightly basis. When clerks arrive each morning, SVRS will have run the checks. The system will also produce a report for clerks to use to audit the results of the check.

A HAVA check compares the Name, Date of Birth, and Driver's License or Social Security Number you have entered into SVRS against the information contained in databases maintained by DOT and SSA. If these pieces of information are not exactly the same in both databases, the voter will fail the check.

Your first job as clerk is to check for data entry errors that caused a person to fail the check. GAB has created a report that will allow you to do this quickly by comparing the information on the report against the information on the voter's GAB-131. If you discover a typo, you will rerun the HAVA check for that voter.

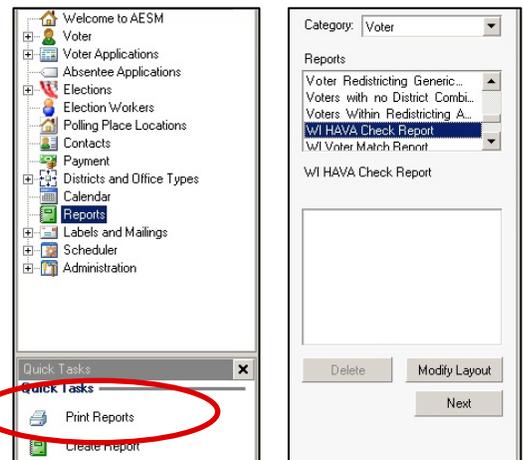
If a voter fails a HAVA check and there was no typo, you will send the voter a notice informing them of the problem. Providers will be responsible for sending out these notices, but the contact information on the notices will be for the municipal clerk, so Reliers must handle voter questions. Reliers must also forward any responses to their Providers to make appropriate changes or notations in SVRS.



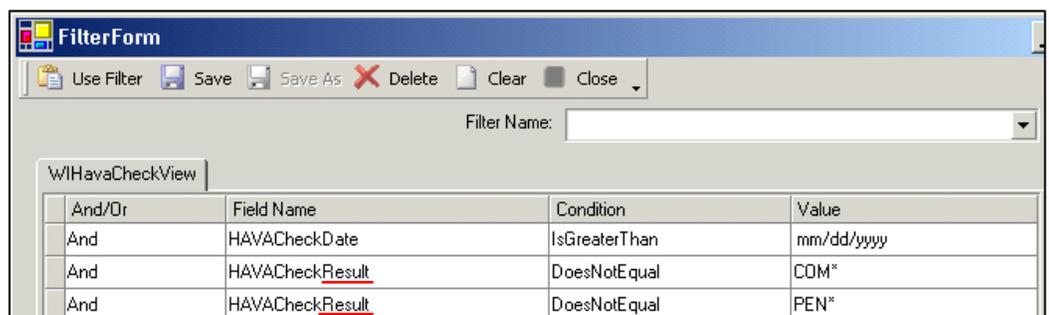
You must run a HAVA Check on each new voter application entered into SVRS. For more information on running the initial HAVA Check, see the [Voter Application](#) chapter.

Generate the WI HAVA Check Report

1. Click the **Reports** node.
2. Click the **Print Reports** quick task.
3. Leave the **Category** set to **Voter**, which is the default.
4. In the **Reports** list, click **WI HAVA Check Report**.
5. Click **Next**.
6. Create a custom **Filter**.



- a. Click the **Custom** button to the right of the **Filter** box.
- b. Create a filter as shown in the screenshot. Enter the desired **HAVACheckDate** in mm/dd/yyyy format on the first line.
- c. Click **Use Filter**.





This filter will return all HAVA Checks run after the specified date that are not still pending, and were not complete matches. These are the records that require further attention.

7. (Optional) **Sort** your report:

- a. Click the **Custom** button next to the **Sort** drop-down list.
- b. Sorting by **HAVA Check Date; DESC** (descending) will put your records in order from most recent to oldest. You may also sort by **NameLast** (last name) and **NameFirst** (first name).
- c. Click **Use Sort**.

FieldName	Order
HAVACheckDate	DESC
NameLast	ASC
NameFirst	ASC

8. Click the **Printer Setup** button, and choose whether to print or export your report. For more information on printing and exporting, see the [Reports](#) chapter of this manual.

9. Select the **Print Now** radio button.

10. Click **Print**. When the **Print Confirmation** dialog box appears, click **OK**.

11. Retrieve the [WI HAVA Check Report](#).

- a. If you exported this report and need information on how to retrieve it from your **My Documents** folder, see the [Reports](#) chapter. A sample of the report is displayed below.

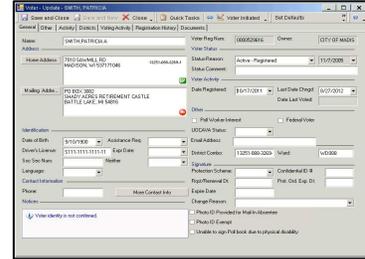
12. Check for data entry errors.

- a. Open the report.
- b. Compare the Name, Date of Birth, DL# and/or SSN on the report against the GAB-131 for each listed voter. If you find any data entry errors, follow the directions below to fix them.
- c. If there are no errors, skip to the section with instructions on how to [Generate the WI DMV Ping Notification](#) letter.

HAVA Check Report										
First Name	Middle Name	Last Name	Suffix	DOB	DL#	SSN	HAVA Ck Date	HAVA Ck Result	Ward	
City of Madison										
PAT		SMITH		08/10/1955	W123-1234-1234-12	1234	03/19/2008	PEND(All Fields Match)	City of Madison - Ward 42	
Wisconsin Driver License/ID Number					W123-1234-1234-12				I have neither a WI Driver License/ID nor a Social Security Number.	
Social Security Number - Last Four Digits (only if no license/ID number)						X X X - X X - 1234				
Print your name exactly as it appears on the document, the number of which you provided in Box 2. (Driver License/ID Card or Social Security Card).										
Last Name		SMITH				First Name		PAT		
Middle Name					Suffix (e.g. Jr, II, etc.)		Phone #			
Date of Birth (MM/DD/YYYY)		8/10/1955			Email Address		PAT.SMITH@FAKE.COM			

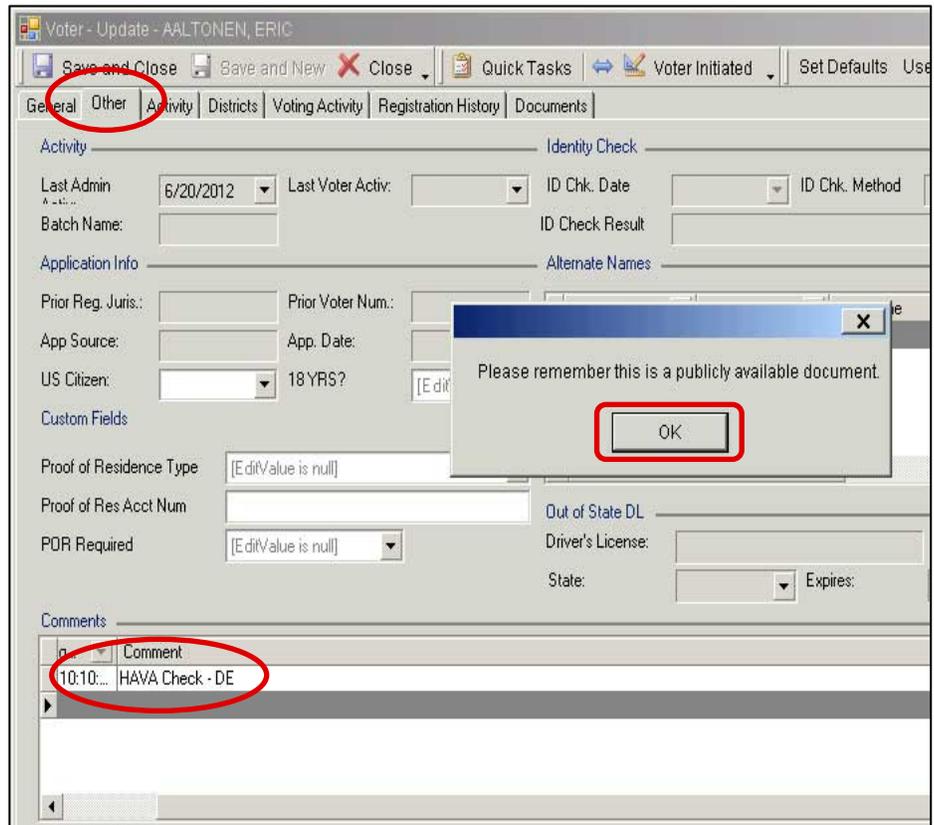
Fix a Data Entry Error and Rerun the HAVA Check from the Voter Node

1. Click the **Voter** node.
2. Search for the voter and open his or her voter record.
3. Correct any data entry errors.
4. Make sure you **Tab** out of the field you changed. This ensures that any information you changed will be included in the HAVA Check.
5. On the toolbar above, click **Quick Tasks**.
6. Click the **HAVA Check** Quick Task.
7. In the confirmation box, click **Yes** to perform a HAVA Check with the updated information.



Running the HAVA Check means that the voter's **Name, Date of Birth, Driver's License, and Soc Sec Num** will be locked. You may not edit these fields until after the HAVA Check is complete. Even if the information you entered is incorrect, you will have to wait until the HAVA Check has run in order to change it.

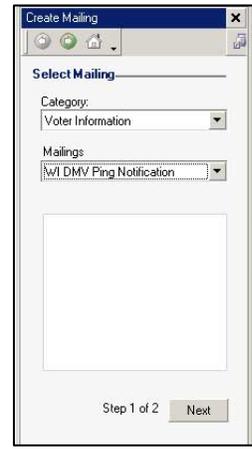
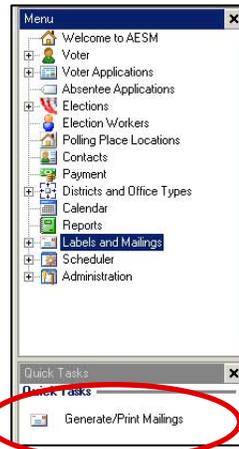
8. On the **Other** tab, enter **HAVA Check – DE** in the **Comment** field. This will allow SVRS to track the number of voters who failed their HAVA Check because of a data entry error.
9. You will receive a prompt to **Please remember this is a publicly available document**. Click **OK**.
10. Click **Save and Close**.
11. Repeat **Steps 2-10** for each voter whose record contains a data entry error.



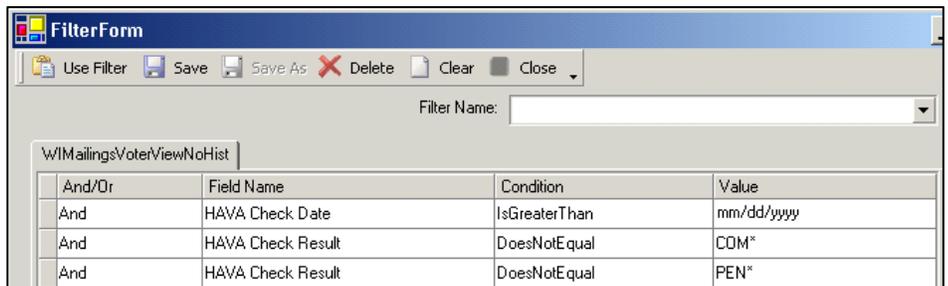
Send the WI DMV Ping Notification Letter

If there are no data entry errors or you have dealt with all errors for the voters listed on the WI HAVA Check Report:

- a. Click the **Labels and Mailings** node.
- b. Click the **Generate/Print Mailings** Quick Task.
- c. In the **Category** box, select **Voter Information**.
- d. In the **Mailings** list, select **WI DMV Ping Notification**.
- e. Click **Next**.
- f. Filter your mailing: 



- a. Click the **Custom** button next to the **Filter** drop-down.
- b. Create a filter that matches the screenshot. Enter the **HAVA Check Date** in mm/dd/yyyy format on the first line.



This filter will return WI DMV Ping Notification letters for all HAVA Checks run after the specified date that are not still pending, and were not complete matches. These should be the same records that appeared on your WI HAVA Check Report.

- c. Click **Use Filter**.
- g. If desired, **Sort** your mailing:
 - a. Click the **Custom** button next to the **Sort By** drop-down. 

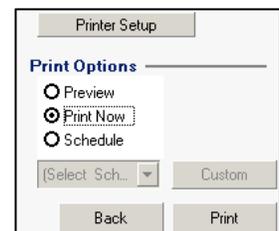
- b. Create a sort that matches the screenshot:



- c. Click **Use Sort**.



- h. Adjust **Printer Settings** as needed.
- i. Click the **Print Now** option button.
- j. Click **Print Now**. When the **Print Confirmation** dialog box appears, click **OK**.
- k. Retrieve and send the WI DMV Ping Notification letters to the voters who have failed the HAVA Check. A sample of the letter is on the next page.



Respond to WI DMV Ping Notification Letter Recipients

1. When a voter contacts you, verify their name, date of birth, driver's license and social security information.



Voters should be reassured that no matter what the results of their HAVA Check, it will not affect their right to vote. Once you have sent the WI DMV Ping Notification letter to a voter, you have met your responsibility to try and verify their information.

You do not have to follow up with the voter or do anything further with the voter's record in SVRS, unless the voter contacts you.

Sample Letter:

City of Madison

MARIBETH WITZEL-BEHL/CITY CLERK
210 MARTIN LUTHER KING JR BLVD
MADISON, WI 53703
(608) 266-6574
mwitzel-behl@cityofmadison.com

September 22, 2011

0000518914
Ron F. Railing
1424 E Blair St 101

Dear Ron F. Railing,

This letter concerns the status of your voter registration in the State of Wisconsin. Please read it all.

Some of the information provided on your voter registration application does not match the records at the Department of Transportation or Social Security Administration. Federal and State election laws require the State to compare this information.

Please contact the clerk's office immediately at the telephone number listed at the top of this letter to verify and correct your personal voter registration information.

Personal information such as your date of birth, driver license number, and the last four digits of your social security number is kept confidential and protected under state law. By providing correct information, you protect yourself from the possibility of a mismatch with other voter information within the Statewide Voter Registration System. Your cooperation assures the accuracy of the registration process for all voters in Wisconsin.

Please respond today.

Thank you for your interest in voting and elections in Wisconsin.

Sincerely,

Maribeth Witzel-Behl
City Clerk
City of Madison - 13251

2. If the voter gives you corrected information:
 - a. Follow the steps to re-run the HAVA Check from the **Voter** node.
 - b. Under the Other tab, enter the comment **HAVA Check – LR** (letter response) in the **Comments** field on the **Other** tab. This will allow SVRS to track the number of voters who responded and corrected their information.
 - c. **Save and Close** the voter record.

Comments	
Last Chang...	Comment
6/16/2009 4:54:2...	HAVA CHECK -- LR

3. If the voter verifies the information you already have in SVRS:
 - a. Search for and open the **Voter** record.
 - b. Enter the comment **HAVA Check – VV** (voter verified) in the **Comments** field on the **Other** tab. This will allow SVRS to track the number of voters who failed their HAVA Check but verified that their information was correct.
 - c. **Save and Close** the voter record.

Comments	
Last Chang...	Comment
6/16/2009 4:54:2...	HAVA CHECK -- VV

The Voter Match Node



The Voter Match Node is the place in SVRS where clerks go to perform three different tasks, each required by HAVA. They are: 1) Death Matches; 2) Felon Matches; and 3) Duplicate Voter Matches. SVRS users should check for matches at least once a month, and more often in the weeks before elections.



It is the municipal clerk's duty to decide whether to confirm or deny an SVRS suggested match to a felon or death record, or as a duplicate. Unless the Provider and Relier agree otherwise, this means that Providers will have to generate and send lists of potential matches to their Reliers on a regular basis. Reliers must examine these lists and note next to each potential match whether the Provider should mark the record as a Confirmed Match or Not a Match. The Provider will then make the appropriate updates in SVRS.

Death Matching

This HAVA requirement makes it the clerk's duty to check the list of voters registered in their municipality against death records maintained by the Department of Health Services (DHS). Voters who have passed away must have their records cancelled, though unlike felon matching, there is no requirement to send a mailing when changing a record based on a match to a death record.

Felon Matching

HAVA requires local election officials to regularly check the list of voters registered in their municipality against a list of felons provided by the Department of Corrections (DOC). Felons on post-correctional supervision are not entitled to vote in Wisconsin, so their voter records must be updated to reflect this.

Each person whose record is changed for this reason must receive a letter. The Provider will generate the WI Felon Notification Ineligible letter, containing the Relier's contact information. The Relier will respond to inquiries from ineligible voters.

Duplicate Voter Matching

HAVA also requires that election officials make efforts to ensure that each voter has only one record in SVRS. This is partially accomplished through the Ad-Hoc matching process performed while entering each new voter application in SVRS. Periodically, however, clerks should perform a Duplicate Voter Match search to check that they have not missed a likely match when entering a new application, and to deal with existing duplicate voter records.

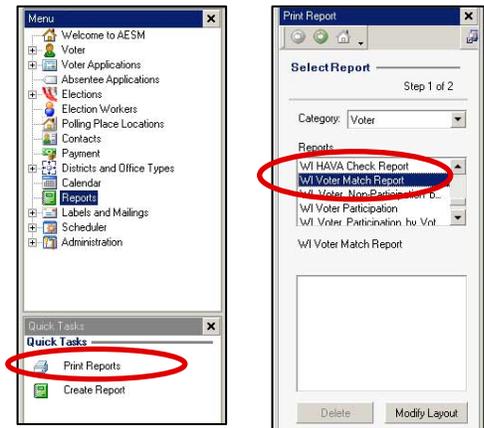
The WI Voter Match Report



It is often helpful to have a paper copy of your potential voter matches. Providers may generate reports for Reliers to use in deciding whether to confirm or deny felon, death, or duplicate matches. Reliers will examine the report, confirming or denying each potential match, and returning the report to the Provider, who will manage the results accordingly. Self-Providers may use this report to pull hard copies of the voter registration forms after the voter has been inactivated or cancelled. Self-Providers may also use this report to merge duplicate records. Once duplicate records are merged, they disappear from the Voter Match node, and no further action is necessary.

(Optional. Self-Providers may choose to skip this step.)

1. Click the **Reports** node.
2. Click the **Print Reports** Quick Task.
3. Leave the **Category** set to **Voter**, which is the default.
4. In the **Reports** list, click **WI Voter Match Report**.
5. Click **Next**.



6. **Filter** your report:

a. Click the **Custom** button next to the filter drop-down.

b. Create a **Filter** that matches this screenshot.

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

c. The filter displayed will return all unconfirmed matches, of any type. If you wish, you can also add a line to filter by **Match Type**. Use **MatchTypeCode**, **Equals**, and **FEL*** to filter for only felon matches; **DEA*** to filter for only death matches; and **DUP*** to filter for only duplicate matches.

d. Click **Use Filter**.



7. Sort your report:

a. Click the **Custom** button next to the **Sort By** drop-down.



b. Copy the **Sort** displayed. Death, Felon, and Duplicate matches will be grouped together, and voters within each group will be arranged alphabetically by name.

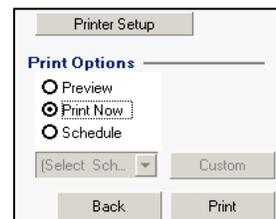
FieldName	Order
MatchType	ASC
VoterLastName	ASC
VoterFirstName	ASC

c. Click **Use Sort**.



8. Click the **Printer Setup** button to adjust **Printer Settings**, as needed.

9. Click the **Print Now** option button.



10. Click **Print**. When the **Print Confirmation** dialog box appears, click **OK**.



Providers – if you generate this report at the county level, and export it to an excel spreadsheet; each jurisdiction in the county will appear on a separate tab of the spreadsheet.

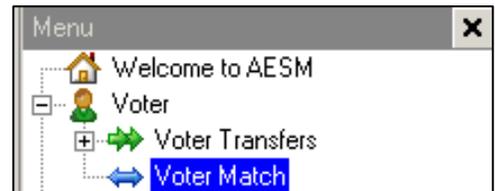
Death Matching



It is the municipal clerk’s duty to confirm or deny any death match based on the information provided by SVRS and any other reliable information the clerk has on hand. For Providers, this may mean generating reports for Reliers to use in deciding whether to confirm or deny a death match. For Reliers, it will mean examining the report, confirming or denying each potential death match, and returning the report to the Provider, who will manage the results accordingly. Self-Providers will perform each of these steps, but they may choose to skip generating the WI Voter Match Report. When a user confirms a death match in SVRS, the voter’s status is changed to Cancelled so he or she will not appear on a poll list.

Search for Potential Matches

1. Expand (+) the **Voter** node on the Main Menu tree.
2. Click on the **Voter Match** node.
3. Use the **Match Type** drop-down to restrict your search.
 - a. Select **Death Record** to search for voters who are potential matches with DHS death records.
4. Click **Search**.



A screenshot of the search interface. It features several input fields: 'Last Name:', 'First Name:', 'Middle Name:', 'Match Type:', 'Date of Birth:', 'Soc Sec Num:', 'From Date:', and 'To Date:'. The 'Match Type' dropdown menu is open, showing 'Death Record', 'Felony Record', and 'Voter Record'. The 'Death Record' option is circled in red. There is a 'Search' button, also circled in red, and a 'Clear' button. A checkbox labeled 'Unresolved Matches' is checked.



Leave the **Unresolved Matches** box checked to exclude those records you have already marked as a match or not a match. If you want to see those records as well, uncheck the box.

Manage Search Results

5. Double-click on the first record in the grid to open the **Match Details** screen.
6. Use the information on the **Match Details** screen to decide whether to confirm the suggested match.

Match Details

Source	Name	Date of Birth	Gender	Race	Soc Sec Num	
13251	DOE, MARY E	01/01/1900				<i>(Voter Record)</i>
Addr: 230 RANDOLPH Drive						
	DOE, MARY ELIZABETH	01/01/1900			###-##-0000	<i>(Death Record)</i>
Addr:						

Additional Information

Voter

Voter Status: Date Registered: Date Last Activity: Gov ID:

Death

Date Of Death: County Of Death: Residence Cnty:

Match

Match Status: Match Basis: Created On:

Match Rank: Last Changed On:

7. If you decide to confirm the match, change the **Match Status** field to **Confirmed Match**.
 - a. (Confirming a Death Record match will change the status of the person's voter record to **Cancelled – Deceased – Death Record Match**.)
8. If you decide not to confirm the match, change the **Match Status** field to **Not a Match**.
9. Click **Save and Close**.

Match Status:

Match History

- Confirmed Match
- Correction Expired
- Invalid Felon, Clemency
- Match Fell Below Threshold
- Not a match
- Unconfirmed Match
- Under Investigation



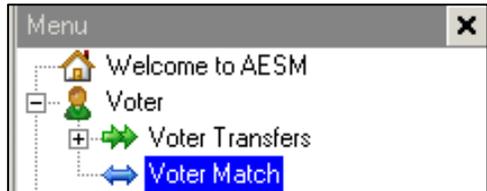
Marking a match record as a **Confirmed Match** or as **Not a Match** will prevent SVRS from suggesting a match between that particular voter and that particular death record in the future.

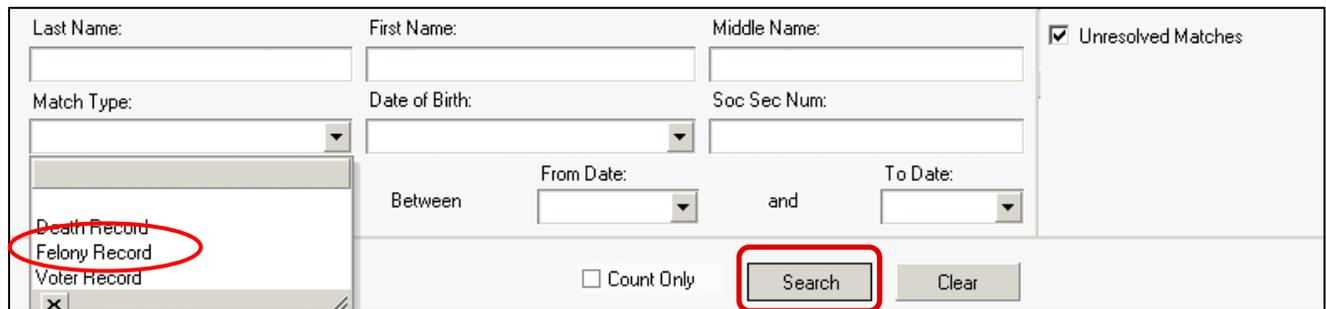
Felon Matching



It is the municipal clerk's duty to confirm or deny any felon match based on the information provided by SVRS and any other reliable information the clerk has on hand. For Providers, this may mean generating reports for Reliers to use in deciding whether to confirm or deny a felon match. For Reliers, it will mean examining the report, confirming or denying each potential felon match, and returning the report to the Provider, who will manage the results accordingly. Self-Providers may choose to skip generating that report. When a user confirms a Felon Match in SVRS, the voter's status is changed to Inactive so he or she will not appear on a poll list. These inactivated voters must receive a mailing informing them of that fact.

Manage Felon Matches

1. Expand the **Voter** node on the Main Menu tree.
 2. Click on the **Voter Match** node.
- 
3. Use the **Match Type** drop-down to restrict your search.
 - a. Select **Felony Record** to search for voters who are potential matches with DOC felony records.
 4. Click **Search**.



Last Name: First Name: Middle Name: Unresolved Matches
 Match Type: Date of Birth: Soc Sec Num:
 Between From Date: and To Date:
 Count Only



Leave the **Unresolved Matches** box checked to exclude those records you have already marked as a match or not a match. If you want to see those records as well, uncheck the box.

5. Manage Search Results.

- a. Double-click on the first record in the grid to open the **Match Details** screen.
- b. Use the information on the **Match Details** screen to decide whether to confirm the suggested match.
 - i. If you decide to confirm the match, change the **Match Status** field to **Confirmed Match**.
 - a. Confirming a **Felony Record Match** will change the **Status** of the person's voter record to **Inactive – Felony Record Match**.



Source	Name	Date of Birth	Gender	Race	Soc Sec Num
13251	DDE, KITTY	01/01/1900			
Addr: 2902 HARVEY Street					
Department of C	DDE, KITTY	01/01/1900			
Addr: 1738 ROTH ST					

Additional Information

Voter

Voter Status: Active Date Registered: 8/29/2007 Date Last Activity: 8/29/2007 Gov ID:

Felon

Dept Cor Ref #: 00099999 Action Date: 10/4/2008 ID Type: ID Number:

Match

Match Status: Unconfirmed Match Match Basis: LNFNDB Created On: 12/26/2007
Match Rank: 80 Last Changed On: 3/22/2008

- ii. If you decide not to confirm the match, change the **Match Status** field to **Not a Match**.
 - a. If the date in the **Action Date** field has passed, the felon has finished his or her post-correctional supervision, and is again eligible to vote. You should mark this record as **Not a Match**, even if the voter record and the felon record belong to the same person.

Action Date:	10/4/2008
--------------	-----------

Confirmed Match
Correction Expired
Invalid Felon, Clemency
Match Fell Below Threshold
Not a match
Unconfirmed Match
Under Investigation
x

- c. Click **Save and Close**.



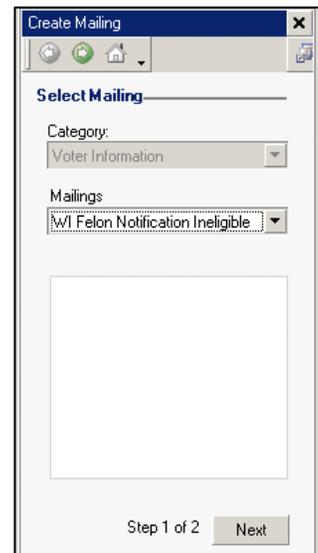
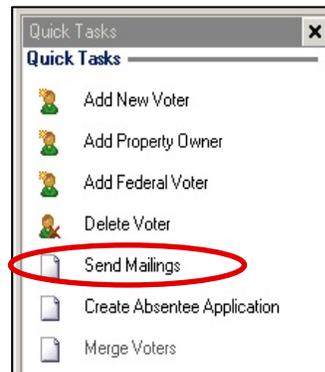
Marking a match record as a **Confirmed Match** or as **Not a Match** will prevent SVRS from suggesting a match between that particular voter and that particular felon record in the future.

Generate the WI Felon Ineligible Notification Letter

The WI Felon Ineligible Notification letter must be mailed to the confirmed felon match. There are two ways to generate this letter. For individual voters, this letter can be generated from the the Voter node. For multiple voters, you may use the Labels and Mailings node.

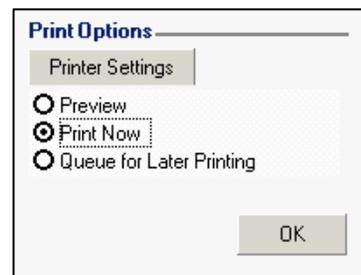
Using the Voter Node:

1. Click the Voter node.
2. Enter the voter's last and first names and click **Search**.
3. Click once on the voter record to highlight it.



4. In the **Quick Tasks** pane, click **Send Mailings**.
5. In the **Mailings** list, select **WI Felon Notification Ineligible**.
6. Click **Next**.
7. Click **Printer Settings**, and adjust as needed.

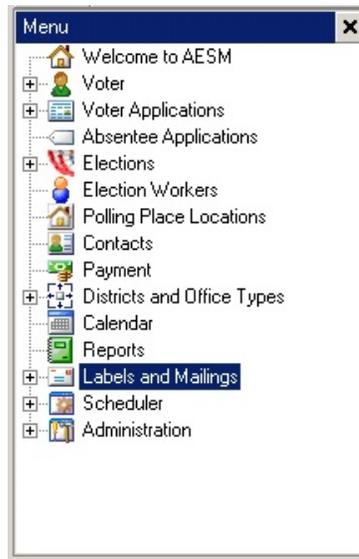
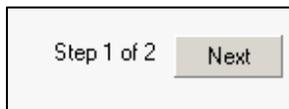
8. Click the **Print Now** option button.
9. Click **OK**.



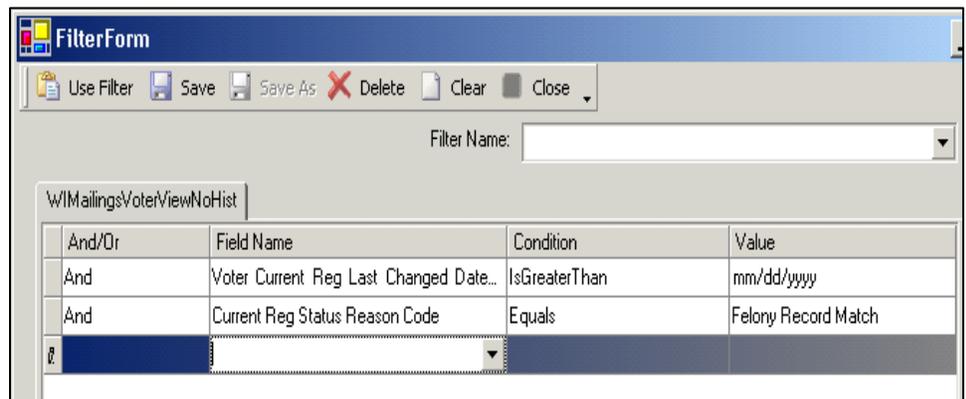
10. A dialog box will appear asking “**Did the mailing print successfully?**” Click **Yes**. This will create a record that the voter was sent the WI Felon Notification Ineligible letter.
11. Retrieve the letter and mail it.

Using the Labels and Mailings node

1. On the main menu tree, click the **Labels and Mailings** node.
2. On the **Quick Tasks** pane, click **Generate/Print Mailings**.
3. Change the **Category** to **Voter Information**.
4. In the **Mailings** list, click **WI Felon Notification Ineligible**.
5. Click **Next**.



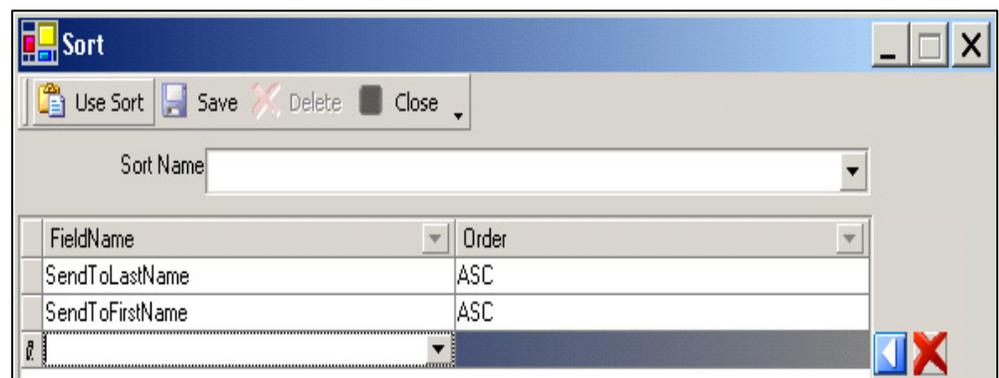
6. **Filter** your mailing:
 - a. Click the **Custom** button to open a filter window.
 - b. Create a filter that matches this screenshot. Enter the date desired (the day before you began making the latest round of felon matches) in mm/dd/yyyy format.
 - c. Click **Use Filter**.



*This filter will select all voter records that have had their status changed to **Inactive – Felony Record Match** after the date specified.*

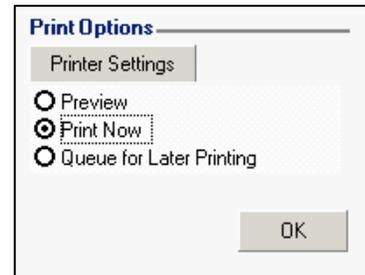


7. **Sort** your mailing:
 - a. Click the **Custom** button.
 - b. Create a sort that matches the following screenshot:
 - c. Click the **Use Sort** button.



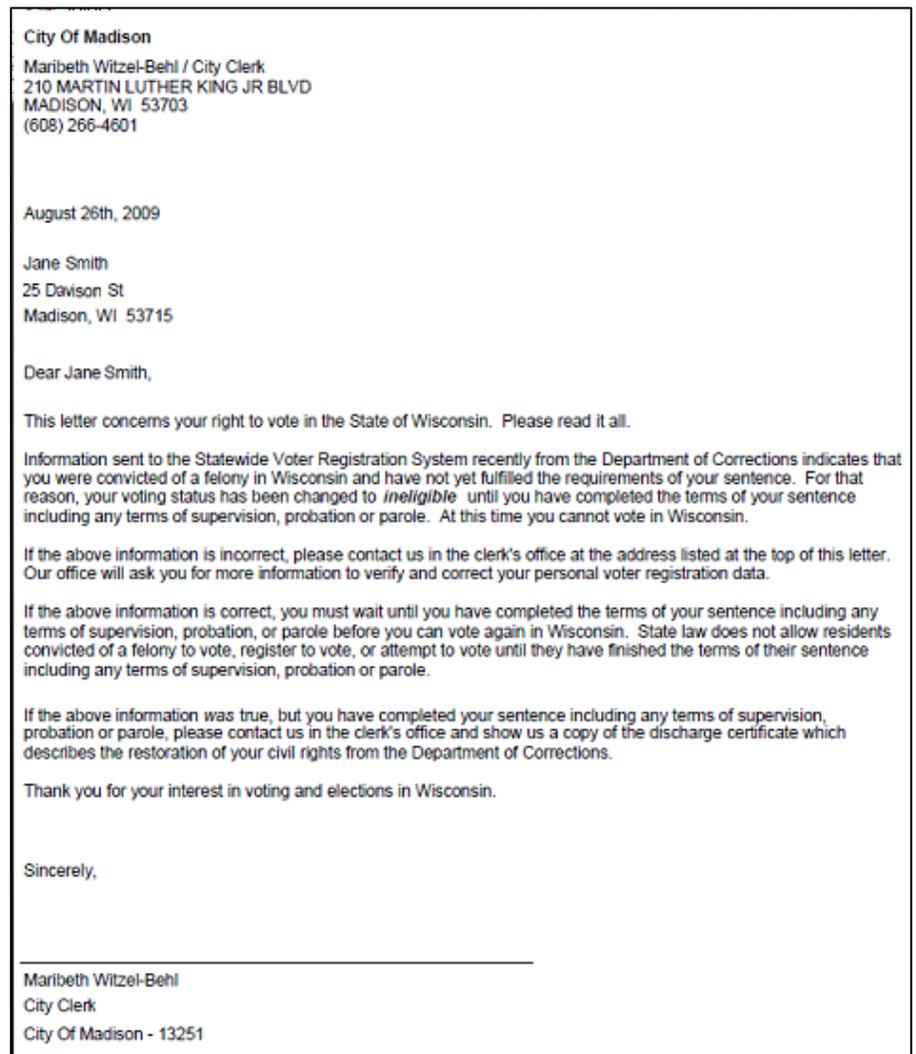
This sort shown above will put your letters in order by the voter's last name, then first name. You can omit or adjust this sort if desired.

8. Adjust **Printer Settings**, as needed.
9. Click the **Print Now** option button.
10. Click **Print**.
11. A dialog box will appear asking “**Did the mailing print successfully?**” Click **Yes**. This will create a record that the voter was sent the WI Felon Notification Ineligible letter.
12. Retrieve and mail the letter(s).



Respond to WI Felon Notification Ineligible Letter Recipients

- A sample of the WI Felon Notification Ineligible letter is shown. Please note that while Providers will generate this letter for their Reliers, the contact information is for the municipal clerk, so Reliers may need to respond to questions.
- Any person convicted of a felony in the State of Wisconsin has been informed multiple times that they will not be eligible to vote until after they have completed their post-correctional supervision.
- Someone may contact your office stating that they have completed their post-correctional supervision. If so, the Department of Corrections will have provided them with documentation proving when their supervision ended. This end date is also called the separation date. Once the person has provided you with proof that their separation date has passed, they can re-register to vote with a new GAB-131 Voter Registration Application.
- If someone contacts your office stating that he or she received a letter, but has never committed a felony, and you cannot obtain any further information, please contact the GAB Help Desk. We will work with the Department of Corrections to resolve the issue.



Duplicate Voter Matching



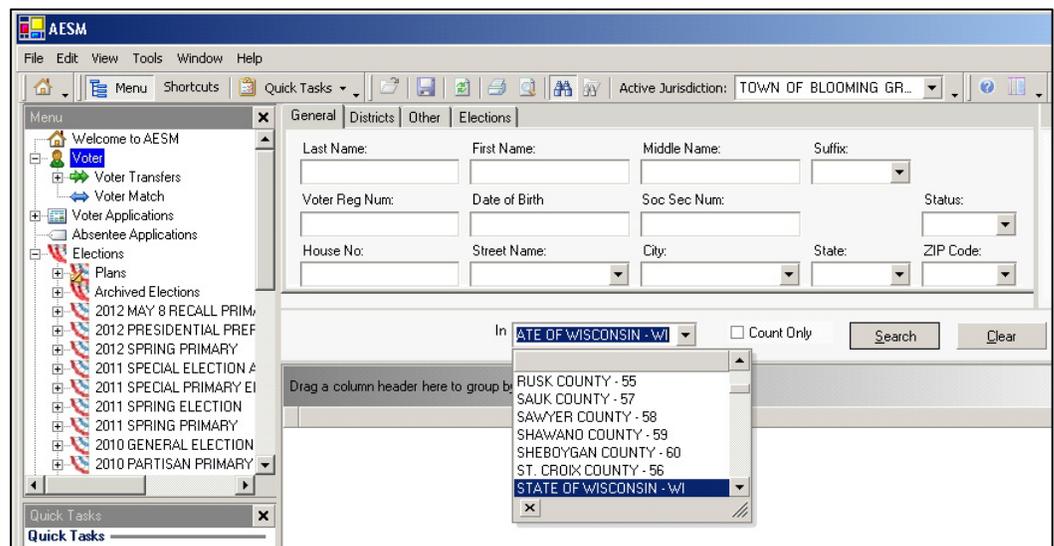
One of the main functions of a statewide voter list is to prevent a single person from having duplicate voter records. It is the municipal clerk's duty to confirm or deny any potential duplicate matches based on the information provided by SVRS and any other reliable information the clerk has on hand. For Providers, this will mean generating reports for Reliers to use in deciding whether to confirm or deny a match. For Reliers, it will mean examining the report, confirming or denying each potential match, and returning the report to the Provider, who will manage the records accordingly.



*Providers and Self-Providers should first generate the WI Voter Match Report and follow the directions below to merge any confirmed duplicate voter records. This will cause the suggested matches to disappear from the Voter Match node. The Voter Match node will then show only those records that are **Not A Match**, and users must deal with them by following **Step 2** and **Step 3** below.*

Merge Duplicate Records

1. Click on the **Voter** node.
2. Change the jurisdiction drop-down in the search grid to **State of Wisconsin**.
3. Search for the first person on your list of voters with duplicate records. Your search should return multiple records.

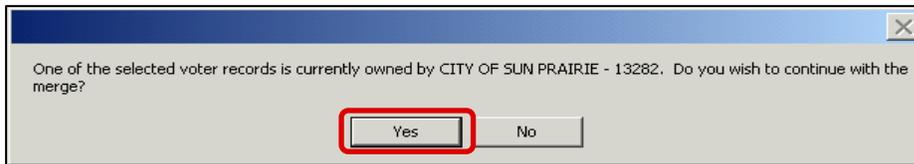


4. Open up each voter record and verify which record is the most recent. See the Voter chapter of this manual for more details.
 - a. Check the **Voter Status**, the **Application Date** on the **Other** tab, the **Date Last Voted**, **Date Registered**, and **Last Date Changed**. Check them all, do 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 your poll list.

- In your search results, click on the record of the voter in your municipality.
- Find the record of the voter you confirmed as a match. Hold the **Ctrl** key and click on this second record. You should now have two records highlighted in the grid.

Jurisdiction	Name	Date Of B...	Place Of Bir...	Party	Gen...	Status
50173	DOE, KAREN M	01/01/1900		Not Applicable		Active
16026	DOE, KATHLEEN KJR...	01/01/1900		Not Applicable		Active
13251	DOE, KATHRYN S	01/01/1900		Not Applicable		Active
41251	DOE, KAITH	01/01/1900		Not Applicable		Inactive
13154	DOE, KARL P	01/01/1900		Not Applicable		Active
60165	DOE, KATHLEEN DIAN...	01/01/1900		Not Applicable		Active
30016	DOE, KATHLEEN T	01/01/1900		Not Applicable		Active
32246	DOE, KATHLEEN	01/01/1900	BOSTON, MA	Not Applicable		Inactive
13255	DOE, KAREN	01/01/1900	US	Not Applicable		Active
30241	DOE, KATHLEEN R	01/01/1900		Not Applicable		Active
05106	DOE, KATHY A.	01/01/1900		Not Applicable		Active
67291	DOE, KATHRYN J	01/01/1900		Not Applicable		Active
45034	DOE, KAREN ANN	01/01/1900		Not Applicable		Active
71020	DOE, KATHLEEN JEAN	01/01/1900		Not Applicable		Active
08201	DOE, KATHRYN S	01/01/1900		Not Applicable		Active
13008	DOE, KATHRYN A	01/01/1900		Not Applicable		Active
13282	DOE, KATHRYN A	01/01/1900		Not Applicable		Inactive
38024	DOE, KATHLEEN MAR...	01/01/1900		Not Applicable		Active
65006	DOE, KATHLEEN	01/01/1900		Not Applicable		Active
50173	DOE, KAREN L	01/01/1900		Not Applicable		Active

- Click the **Merge Voter** Quick Task to open the **Merge Voters** pane on the left of the screen.
 - If one of the records belongs to another municipality, you will see the following message. Click **Yes**.



- A new **Merge Voters** panel will replace the main **Menu** area and **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.



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

- Select the **Master Record** using the radio button to the left of that record. Information for that record will be displayed in the boxes on the next page.



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 enter it into the **Master Record** after the merge.

10. Click the **Merge Voters** button.

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



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



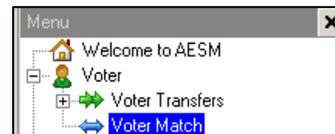
13. The **Merge Voters** panel will disappear and the Main Menu and Quick Tasks will reappear.



For information on how to obtain a list of voters that have been merged out of your municipality, see the Voter chapter of this manual.

Search for Remaining Matches in the Voter Matches Node

- Expand (+) the **Voter** node on the Main Menu tree.
- Click on the **Voter Match** node.
- Use the **Match Type** drop-down to restrict your search.
- Select **Voter Record** to restrict your search to voters with multiple records in SVRS.



Last Name:	First Name:	Middle Name:	<input checked="" type="checkbox"/> Unresolved Matches
Match Type:	Date of Birth:	Soc Sec Num:	
Between	From Date:	and	To Date:
<input type="checkbox"/> Count Only	Search	Clear	

Note: In the Match Type dropdown, 'Voter Record' is circled in red.

- (Optional) Set a **From Date** and **To Date** to limit your search to just those potential matches created between set of dates.
- Use other search fields as desired.
- Click **Search**.

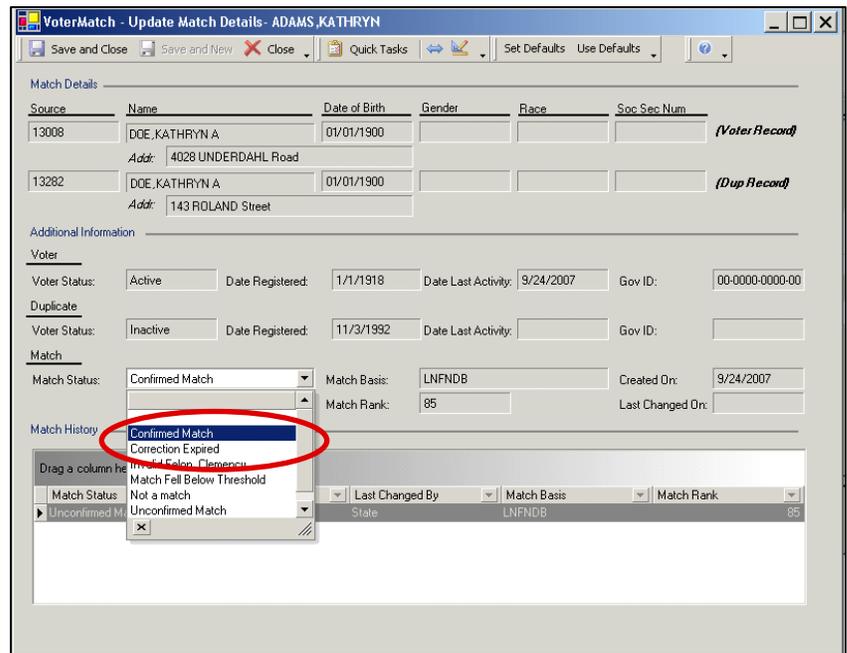


Leave the **Unresolved Matches** box checked to exclude those records you have already marked as a match or not a match. If you want to see those records as well, uncheck the box.

Manage Search Results

If you have already followed the steps above and merged any duplicate records, the search grid will only show records that are **Not a Match**. If you find any remaining records that are duplicates, confirm them as matches, write down the voter's information, and follow the steps above to merge the records together.

1. Double Click on the first record in the grid to open the **Match Details** screen.
2. Use the information on the **Match Details** screen to decide whether to confirm the suggested match.
3. If you decide not to confirm the match, change the **Match Status** field to **Not a Match**.



Match Details

Source	Name	Date of Birth	Gender	Race	Soc Sec Num	
13008	DOE, KATHRYN A	01/01/1900				(Voter Record)
Addr: 4028 UNDERDAHL Road						
13282	DOE, KATHRYN A	01/01/1900				(Dup Record)
Addr: 143 ROLAND Street						

Additional Information

Voter

Voter Status: Active Date Registered: 1/1/1918 Date Last Activity: 9/24/2007 Gov ID: 00-0000-0000-00

Duplicate

Voter Status: Inactive Date Registered: 11/3/1992 Date Last Activity: Gov ID:

Match

Match Status: Match Basis: LNFNDB Created On: 9/24/2007

Match Rank: 85 Last Changed On:

Match History

- Confirmed Match
- Correction Expired
- Match Fell Below Threshold
- Not a match
- Unconfirmed Match

Match Status: Last Changed By: Match Basis: LNFNDB Match Rank: 85

4. If you decide to confirm the match, change the **Match Status** field to **Confirmed Match**.
 - a. Write down the name of any voter you mark as a **Confirmed Match**. You will need to follow the steps above and merge any duplicate records.
5. Click **Save and Close**.



Marking a match record as a **Confirmed Match** or as **Not a Match** will prevent SVRS from suggesting a match between those voter records in the future.

