



Appendix B –SVRS Election Checklists Overview of Milestones and Activities

Overview of Milestones and Activities	Details
<input type="checkbox"/> 1. Setup or “Inherit” Election (Select an Election to Work With) <input type="checkbox"/> a. Counties “Inherit” Election from State; Municipalities “Inherit” Election from County. <input type="checkbox"/> b. Assign Polling Place Assignment Plan.	<ul style="list-style-type: none"> • Verify that you have added Polling Place Locations and created a Polling Place Assignment Plan • Absentee Applications can be added before the election cycle begins
<input type="checkbox"/> 2. Milestone 1: Election Setup The basic election setup is complete and the election is Scheduled.	<ul style="list-style-type: none"> • This milestone is automatically marked complete when the election setup Wizard creates an election for a particular jurisdiction
<input type="checkbox"/> 3. Check Milestone 2: Election Active If checked, the election cycle has begun and the election is active.	<ul style="list-style-type: none"> • Allows contests to be setup and candidates to be entered
<input type="checkbox"/> 4. Enter Detailed Election Information <input type="checkbox"/> a. Add Contests and Referenda. <input type="checkbox"/> b. Add New Candidate Filing: <input type="checkbox"/> i. Add Contact Record (if not registered voter). <input type="checkbox"/> ii. Add and Approve Candidate Filing.	<ul style="list-style-type: none"> • Office Types can be setup prior to an election and are reused each time the office is added as a contest to an election
<input type="checkbox"/> 5. Check Milestone 3: Ballot Setup Finalized If checked, all contest changes and candidate filings are setup and ballot styles can be generated.	<ul style="list-style-type: none"> • No changes to candidates, contests, or referenda can be made after reaching this milestone • This milestone must be coordinated between jurisdictions that have the same contest on ballots
<input type="checkbox"/> 6. Generate Ballot Styles	<ul style="list-style-type: none"> • Do not generate absentee ballot labels until after ballot styles have been generated
<input type="checkbox"/> 7. Check Milestone 4: Ballot Styles Finalized If checked, all ballot styles are setup and absentee ballots can be processed.	<ul style="list-style-type: none"> • After this milestone is reached, ballot styles have been created and no changes to ballot styles are allowed • After creating ballot styles, no changes can be made to District Combos • Labels for absentee ballots cannot be generated before this milestone is reached
<input type="checkbox"/> 8. Generate and Send Absentee Ballots (Issue Ballots and Generate Labels as a Batch) <input type="checkbox"/> 9. Continue to add Late Registrations <input type="checkbox"/> 10. Setup and Print Poll Books <input type="checkbox"/> 11. Continue to Add Absentee Applications, Issue Absentee Ballots and Generate Labels	
<input type="checkbox"/> 12. Check Milestone 5: Poll Books Printed If checked, poll book printing is completed for the election.	
<input type="checkbox"/> 13. Process Election Day Registrations and Update Proof of Residence <input type="checkbox"/> 14. Record Ballots with Barcode Scanners <input type="checkbox"/> 15. Record Contest Winners and Update Office Holders	
<input type="checkbox"/> 16. Check Milestone 6: Election Results Finalized If checked, all election results are entered for the election.	
<input type="checkbox"/> 17. Check Milestone 7: Payments Complete If checked, all payments are entered and completed for the election.	<ul style="list-style-type: none"> • Using SVRS to generate payments to Workers and Polling Place Locations is optional at this time
<input type="checkbox"/> 18. Mark Polling Places Used (Optional)	
<input type="checkbox"/> 19. Check Milestone 8: Election Day Closed If checked, the election day has passed, but all voting activity is not yet recorded.	<ul style="list-style-type: none"> • Corresponds with the election status of closed
<input type="checkbox"/> 20. Check Milestone 9: Election Finalized If checked, all election tasks are completed and the election is closed.	



Appendix B –SVRS Election Checklists Overview of Milestones and Activities

Detailed instructions for each step can be found in the section of the updated training materials noted in parenthesis below. Please refer to the updated materials found on the Government Accountability Board - Elections Division website: <http://gab.wi.gov/>

The Government Accountability Board – Elections Division (GAB) has created the 2012 Spring Primary in SVRS.

County Level Tasks:

*Steps 1 - 2 are performed by each county by noon, **Wednesday, January 26, 2012.**

- Step 1: Counties inherit the 2012 Spring Primary created by the State (*Election Set Up: Page 10*).
- Step 2: Counties check Milestone #2 for the election. Milestone #1 is automatically checked when the election is inherited (*Election Set Up: Page 14*).

*Steps 3 - 4 can be performed interchangeably.

- Step 3: Continue to Follow the Election Set-up chapter to add contests (*Election Set Up: Pages 15-27, 21-27 are optional*). Please use the Ballot Position numbers that are listed in the SVRS Training Manual.
- Step 4: Counties check Milestone #2 for the election. Milestone #1 is automatically checked when the election is inherited.

Municipal Self-Providers/Provider Tasks:

Steps 5 - 8 can be started as soon as Step 2 is completed by the County.
All steps must be performed no later than **January 30, 2012.**

- Step 5: Self-Providers/Providers check the Polling Place Assignment Plans (PPAPs) to determine which plan will be used for this election. If none of the existing PPAPs match the poll book set-up for this election, a new PPAP must be created (*Polling Book: Pages 1-4 and Election Set up: Pages 4-7*).
- Step 6: Self-Providers/Providers check the Reporting Unit Plans (RUPs) to determine which plan will be used for this election. A RUP is a ward or combination of wards by which clerks report their election results to the county. This should match the canvass. There are at least 3 RUPs for every municipality already created in SVRS. Please review the plan detail, regardless of the name of the plan (*Election Set Up: Pages 8-9*).
- Step 7: Self-Providers/Providers inherit the 2012 Spring Primary. Be sure to assign the PPAP and RUP (that were determined in steps 5 & 6) in the election set-up wizard (*Election Set Up: Page 10-11*).
- Step 8: Self-Providers/Providers check Milestone #2 for the election. Milestone #1 is automatically checked when the election is inherited (*Election Set-Up: Page 14*).

*Steps 9 - 10 can be performed interchangeably.

- Step 9: Continue to follow the Election Set-up chapter to add municipal level contests, if there are any. (County and State Offices will be entered by County and State users respectively.) (*Election Set Up: Pages 15-27, 21-27 are optional*).
- Step 10: Municipal clerks send state write-in ballots to current military electors by **January 5, 2012.** Additional write-in ballots should be sent to new military electors as their applications are received until the official ballots are available. These electors must be tracked in SVRS; Providers will use Absentee Lite to track these electors (*Absentee Lite Chapter*). Self-Providers who are using full absentee will use the "Send Write-In Ballots" Quick Task (*Absentee Ballots Chapter*). Self-Providers who are not using full absentee may use Absentee Lite (*Absentee Lite Chapter*).

Please refer to the training manual found on the Government Accountability Board - website: gab.wi.gov

The Government Accountability Board – Elections Division (GAB) checked Milestone #3 for the State on Saturday, January 28, 2012.

County Level Tasks:

*Steps 1 - 2 are performed by each county by the end of the day, Friday, January 30, 2012.

- Step 1: Follow the Election Set-Up chapter to add contest and enter candidate filings (*Election Set-Up: Pages 15-27, 21-27 are optional*). Please use the Contest Ballot Position numbers that are listed on page 17 in the Election Set-Up Chapter of the SVRS Application Training Manual.
- Step 2: Counties use the G.A.B. Canvass Reporting System to verify that all contests and candidates have been entered into SVRS correctly. The Election Night Call-In Return Sheet and the Contests By Reporting Unit for County Use reports both show all contests and candidates and can be used for this purpose. See the Canvass chapter of the SVRS Application Training Manual for more information.
- Step 3: Counties check Milestone #3 for the 2012 Spring Primary no later than January 30, 2012 (*Election Set-Up: Page 27*). Please notify Self-Providers that Milestone #3 has been checked at the county level.

Municipal Self-Providers/Provider Tasks:

- Step 4: Follow the Election Set-up chapter to add contest and enter candidate filings, if there are municipal level contests (*Election Set-Up: Pages 15-27, 21-27 are optional*).
- Step 5: Self-Providers/Providers check Milestone #3 no later than January 31, 2012. Do not complete this step until receiving notice that the county has checked Milestone # 3. Continue immediately through step 6 of this check list (*Election Set-Up: Page 28*).
- Step 6: Self-Providers/Providers generate Ballot Styles (*Election Set-Up: Page 29*).
- Step 7: Self-Providers/Providers set Milestone #4 for the election (*Election Set Up: Page 29*).
- Step 8: All Military absentee electors must have their official absentee ballot sent to them no later than January 31, 2012. All Self-Providers must track these Absentee Ballots in SVRS on the day the absentee ballot is sent.

Providers must track the absentee ballots for military electors in SVRS for their Reliers no later than February 01, 2012. Providers should work with Relier municipalities to determine the number of military absentee electors each Relier municipality.
- Step 9: Self-Providers who use SVRS to track Absentee Ballots may begin issuing absentee ballot labels for non-military electors.

Wednesday, February 01, 2012 - CLOSE OF VOTER REGISTRATION

- Enter all GAB-131s from voters who registered in person by close of business **February 01, 2012**.
 - ◆ “In Person” is defined as registering in front of an election official – a clerk or special registration deputy. Examples of in-person registration are: in your office, at libraries, and at schools. In-person registration can also occur during special registration drives in front of a special registration deputy

- Enter all mailed-in GAB-131s that are postmarked on or before **February 01, 2012**.
 - ◆ You must enter into SVRS all mailed-in GAB-131s postmarked on or before **February 1**. In the Voter Application screen in SVRS, you will enter the postmark date into the field labeled **Effec. Reg. Date**. **Example:** John’s registration form is postmarked **February 1** and it arrives in the clerk’s office on **February 2**; you should enter **February 1** as the effective registration date. If you are transferring John into your municipality, make sure you update the effective date to reflect the postmark

Thursday, February 02, 2012 – Friday, February 17, 2012 - LATE REGISTRATION PERIOD

When voters register in your office after **February 01, 2012**, you must issue each of them a Certificate of Registration (GAB-133). Since the GAB-133 is used exclusively by clerks in their office, the form is available to clerks from the GAB Help Desk (608-261-2028) by fax, USPS, email or generated through SVRS. A fill-able version of the form, which can be typed-in rather than hand-written, is also available by email or generated through SVRS.

- ◆ Late Registration may only take place:
 1. In the Municipal Clerk’s office.
 2. In the County Clerk’s office if the municipality is relying on that County.
 3. If a hospitalized elector registers by agent.

- ◆ Anyone registering after **February 01, 2012** must receive a Certificate of Registration
- ◆ Providers who carry out late registration duties on behalf of their Relier(s) during this period must also issue Certificates of Registration (GAB-133). When Providers assign sequential numbers to the Certificates of Registration, the Provider should put a “C” after the number. **Example:** Jane lives in the Village of Elkhart Lake which Relies on Sheboygan County. Jane can go to the Sheboygan County Clerk’s office to register and receive a Certificate of Registration instead of visiting the clerk’s office in Elkhart Lake
- ◆ Counties cannot register voters on behalf of Self-Providers during Late Registration. **Example:** Mary lives in the City of DePere – a Self Provider. If Mary tries to register in the County Clerk’s office after **February 1**, she will be re-directed to the City of DePere Clerk to register and receive a Certificate of Registration
- ◆ All mail-in registration forms that are postmarked **AFTER February 1, 2012** are **INVALID** for the 2012 Spring Election. If you receive mail-in registration forms postmarked after **February 1**, please contact the voter and recommend that he/she choose one of the following:
 1. Visit the clerk’s office and register in person before the election – requires proof of residence.
 2. Register (EDR) at the Polling Place – requires proof of residence.
 3. Hold his/her registration for post-election entry – this option means the person will not be allowed to vote until a future election.

NOTE: (Optional) If you are using SVRS to track absentees, continue to process absentee applications and issue absentee ballots in SVRS.

February 20, 2012 DEADLINE TO PRINT POLL BOOKS.

When Should I Print My Poll Book?

The GAB Elections Division strongly encourages you to wait until at least **February 2, 2012** to print your official poll book. Please consider the following when determining when to print your poll book:

- ◆ Once you print your final poll book, anyone who registers after that will not show up on any pre-printed poll list, and will be required to provide a Certificate of Registration (GAB-133) at the polling place. Although all late registrants will have received a Certificate of Registration, only those not appearing on the pre-printed list will be required to provide it at the polling place
- ◆ Poll workers will need to record voter information on the Supplemental Poll List (GAB-107) from those who provide a Certificate of Registration (GAB-133) at the Polling Place and who do not appear on the pre-printed Supplemental Poll Book (see below)
- ◆ Providers should consider how long it takes to print and deliver poll books. Give yourself a reasonable timeframe to deliver poll books to your polling places on time

The more names that appear on the printed poll book, the fewer names poll workers will have to manually add to the GAB-107 on Election Day and the fewer names clerks will have to later manually reconcile voter participation within SVRS. This will reduce confusion for poll workers, reduce inconvenience to voters, and reduce confusion for clerks.

Check SVRS to make sure you have your poll books set up properly for the Spring Primary.
Each Reporting Unit needs to have a separate Poll Book

- ◆ The Polling Place Assignment Plan and the Reporting Unit Plan set up when the election was inherited in SVRS need to match. Each line in the Polling Place Assignment Plan and in the Reporting Unit Plan represents a separate poll book and reporting unit, respectively. The number of lines in these plans needs to match

Example: If your Reporting Unit Plan has Ward 1 as a reporting unit and Ward 2 as a separate reporting unit, then your Polling Place Assignment Plan must have Ward 1 as a poll book and Ward 2 as a separate poll book. See pages 4 – 9 of the Election Set Up chapter in your updated SVRS Application Training Manual. (page numbers refer to the updated sections posted on the GAB website)

How Is My Poll Book Organized?

PART I: Poll Book (generated by and printed from SVRS)

- a. Contains names of all voters who registered by **February 1**.
- b. Contains names of all Confidential Voters who registered by **February 1**.

PART II: Supplemental Poll Book (generated by and printed from SVRS)

- a. Contains names of all voters who registered during Late Registration until the time you printed your poll book.
- b. Contains names of all Confidential Voters who registered during Late Registration until the time you printed your poll book.

HAND-WRITTEN SUPPLEMENTAL LIST (GAB-107)

- a. Contains names of voters who present Certificates of Registration at the polls and whose names do not appear on the supplemental poll book.
- b. Contains names of voters who register on Election Day.

<i>How Application Received</i>	<i>By 5pm on February 01</i>	<i>Between February 02 and the day you print your Poll Book</i>	<i>From when you print your Poll Book through Election Day</i>
<i>In Person outside clerk's office</i>	Part I of Poll Book	Part II of Poll Book	GAB-107 Supplemental List Only voters who present Certificates of Registration at the polls
<i>In Person outside clerk's office</i>	Part I of Poll Book	Invalid. Not included on any list.	GAB-107 Supplemental List Only voters who register at the polling place on Election Day
<i>Mail</i>	Part I of Poll Book postmarked by February 01	Invalid. Not included on any list.	Invalid. Not included on any list.

What Happens After I Print My Poll Book?

- ◆ Instructions are on Pages 2-17 of the *Set up & Print Poll Book* tab in your updated Application Training Participant Guide
- ◆ If you generate and print a test poll book before your official poll book, you need to delete it and generate a new one to use as your official poll book
- ◆ If you print your poll book from a computer that is not certified for use on SVRS, you must install the 3 of 9 Barcode font before barcodes will print
- ◆ If you do not have names on your poll book, check to make sure you have generated ballot styles. See Page 28 of the *Election Set Up* chapter in your updated SVRS Application Training Manual

What Happens After I Print My Poll Book?

- Prepare Poll Lists for use at Polling Places.
- Provide poll workers with copies of blank Supplemental Poll List forms for your poll book binder. **GAB-107** from *Forms & Publications* at (<http://elections.wi.gov/>).
- February 2012 may see a large increase in the number of provisional ballots. Please review the Provisional Voting section in the Electors chapter of the Election Administration Manual, and make sure your election workers are prepared.
- Self-Providers and Providers for their Relier(s) set milestone #5. Checking milestone #5 is an indication to GAB that you have printed out official poll books – do not do this until you know you are satisfied with your poll list.

Print an Absentee Ballot Log for each polling place. If you use SVRS to track your absentee electors, instructions for printing the WI Absentee Application Ballot Log from SVRS are on page 37 of the *Absentee Ballots* chapter of the SVRS Application Training Manual.

TUESDAY, FEBRUARY 21, 2012 ELECTION DAY!



Appendix B –SVRS Election Checklists Overview of Milestones and Activities

Detailed instructions for each step can be found in the section of the updated training materials noted in parenthesis below. Please refer to the updated materials found on the Government Accountability Board - Elections Division website: <http://gab.wi.gov/>

Previous steps were completed prior to the election (SVRS Election Checklist I & II).

Steps 1 – 2 are performed after the polls close.

- Step 1: Count ballots, tabulate votes and record on the appropriate Tally Sheets, and complete forms. (See *Post-Election Checklist, Page 78 in the "Election Day Manual for Wisconsin Election Officials"*).
- Step 2: Municipalities send one original copy of each poll list to the County Clerk by 4p.m. the day after the election.(See *Post-Election Checklist, Page 78 in the "Election Day Manual for Wisconsin Election Officials"*).
- Step 3: By 4:00 p.m. on **February 22, 2012**: Report the number of Provisional Ballots issued to the GAB - Elections Division, including whether or not the ballot was counted.

Steps 4 – 15 must be completed by March 17, 2011.

- Step 4: Reliers promptly send copies of any GAB-131s not already entered in to SVRS (*including late registrations and Election Day registrations*) and Poll Lists to Providers (*if not already provided to the county clerk*).
- Step 5: Self Providers or Providers for their Relier(s) check Election **Milestone #5**, if not already checked, for the 2011 Spring Primary Election (*Poll Book: Page 17*).
- Step 6: Self Providers or Providers for their Relier(s) enter and process late registrations in SVRS. Choose the App Source of "Late Registration" (*Voter Application: Pages 3-15*).
- Step 7: Self Providers or Providers for their Relier(s) **record** voter participation in SVRS. For **Late Registrants** processed in Step 8, the Voter ID number will have to be entered manually to record voter participation (*Post Election Activities: Pages 8-11*).
- Step 8: Self Providers or Providers for their Relier(s) process **Election Day Registrations** in SVRS with the App Source of "Election Day Registration." This will automatically record a voting record. If no ballot was issued, choose the App Source of "Election Day Registration – No Ballot Issued" (*Voter Application: Pages 16-17*).
 - If any Election Day registrations are incomplete applications, see the SVRS Application Training Participant Guide for instructions on processing the application (*Post Election Activities: Pages 5-7*).
- Step 9: If any Provisional Ballots were issued, Self Providers and Reliers are reminded to report them to the GAB - Elections Division, including whether or not the ballot was counted.
- Step 10: Self Providers or Providers for their Relier(s) review Poll Books. Update voter records for Proof of Residence (ID Required) provided by voter (*Voter-Maintaining Voter Records: Page 14*). Update any name changes or other typographical errors noted on the poll books (*Voter-Maintaining Voter Records: Page 9*).

- Step 11: Municipal Clerks complete Election Voting and Registration Statistics Report (GAB-190). All GAB-190s must be entered into an online program, the Wisconsin Election Data Collection (**WEDCS**) within the 30 days following the election. “Online” does not mean emailing a copy of the GAB-190 to the G.A.B. All municipalities that use the SVRS should have access to the WEDCS and will enter their GAB-190(s) into the program. Reliers who do not have access to the WEDCS should send a copy of their GAB-190 to their Provider for entry. GAB-190 should be updated as absentee ballots are returned late to your office (*WEDCS Chapter*).
- Compare the response on questions 2 of the GAB-190 to the total votes recorded in SVRS. SVRS has two reports that will be useful: Vote Count by Voting Method and the Voter Participation Report (*Post Election: Pages 12-19*).
- Step 14: Self Providers or Providers for their Relier(s) check Milestones 6-9 for the 2011 Spring Election (*Post Election: Pages 23*).
- Step 15: County checks Milestones 5-9 for the 2011 Spring Election (after all municipalities have checked theirs) (*Poll Book: Page 17 & Post Election: Pages 23*).

If you do not come up with matching results, please consider the following methods to reconcile participation.

Check that all of the Election Day Registration’s have been entered AND that all of those voters have a vote recorded. Look up the voter in the Voter node, open their record, look at the voting activity tab and verify that participation for this election is included.

Check your supplemental list.

Look up all of the voters that are on the supplemental poll book or supplemental list from Election Day to be sure that they have a vote recorded. Look up the voter in the Voter node, open the record, look at the voting activity tab and verify that participation for this election is included.

Compare Poll Books to Voter Participation Report (*Post Election Activities: Pages 17*)

Print the WI Voter Participation Report from SVRS and compare it side-by-side with the poll book from the Election Day. This list can be generated by polling location or by municipality. This report is most effective close to the election. This report does not include voters who move out, are merged out, or are linked into a new record. When you find voters that do not appear on this report, double check them in the Voter node to be sure that they have a vote before you consider trying to add a vote. The most accurate count of voters for an election is the Vote Count by Voting Method Report.

Check the numbers in the poll book. If you are missing any get the other copy and look for them.

Type each number that was used in a given poll book into an excel file, sort the file, and identify the numbers that you are missing. Then, look in the other copy of the poll book for the numbers that you are missing. This poll book is most likely not located in your location (one copy at the county and one at the municipality) so you may need to request assistance from the other office. Also check the Inspector’s Statement to see if any of the numbers that you are missing/looking for were a problem voter that may have resulted in no participation by that voter.

Be sure the right number is in Question #2 on the GAB-190 and entered correctly in WEDCS.

This number should be the number of people that participated in the election. Ideally this would be the last voter number that was issued, but it may not be if there were numbers that were skipped or missing, then the last voter number is not the answer to question #2.

