

SVRS Webinar Training Series

“November Election Preparation”

Preparing for the November Election in SVRS

Wednesday, August 27, 2014

10:00 a.m. – 11:30 a.m.

Program Presenters:

Wisconsin Government Accountability Board Staff

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- Sarah Whitt – SVRS Functional Lead

Agenda

- Introduction
- Back to Basics:
 - Tools for staying on track
 - Technical considerations
 - Verification Postcards
- Election Setup in SVRS
 - Polling place assignment and reporting unit plans
 - Contest
 - Ballot Styles
 - Data Quality
- Absentee Voters in SVRS
 - Tracking UOCAVA voters
 - Managing all absentee ballots
- Verification postcards

Summary:

This webinar will feature the SVRS Election Setup, best practices to avoid errors in the election setup, and the interaction between the election in SVRS and information displayed on the MyVote website. We will also discuss voter verification postcards and clerk responsibility when a postcard is returned. Finally, we will cover tracking UOCAVA voters in SVRS, how absentee ballots may be accessed through the MyVote website, and how absentee ballots are managed in SVRS.

Back to Basics:

Tools for Staying on Track

Checklists?

- Checklist I:
 - Inheriting the election
 - SVRS election setup tasks, including setting up specific contests, for county and municipality, setting up Polling Place Assignment Plans and Reporting Unit Plans, etc.
 - Voter data quality maintenance
 - Additional information (e.g. new legislation & its impact on election setup).
- Checklist II:
 - Notice that State has checked Milestone #3
 - Deadline for County to check Milestone #3
 - Deadline for Municipality to check Milestone #4
 - Tasks relating to issuance of Absentee Ballots
 - Tasks/information relating to registration, printing poll books, and ineligible voter list.
- Checklist III: (Covers Election Day and Post-Election tasks)

An email containing the checklist is sent to all SVRS users. After the email has been sent, the checklist(s) can be found on the GAB website by clicking on Clerks and selecting Recent Clerk Communications.

Calendar of Election & Campaign Events

A downloadable Calendar of Election and Campaign Events can be found on the GAB website. The calendar contains all deadlines and events that occur within a given year (for example, the current calendar contains information for dates between November, 2013, and December, 2014). The calendar may be found by selecting Calendar from the Resources section of the GAB Home Page. Above the calendar filters is a link for Calendar of Election and Campaign Events 2013-2014. Clicking on the link provides access to the calendar and also instructions for adding the calendar items to your own Outlook calendar.

FULL Election Calendar of Election and Campaign Events 2014-2014 located here:

<http://gab.wi.gov/publications/2013-2014-election-events-calendar>

Technology Tips for a Trouble-free Election

Test your login for websites used on Election Night and Post-Election

Avoid last minute calls to the G.A.B. HelpDesk for technical support by logging into sites like WEDCS, Canvass, and CRM (Election Data) a couple of days before the election. Make sure anyone in your office who needs access to these sites tests their login credentials. By performing a “test run” on your login information early, any potential problems can be found and addressed prior to Election Day.

If you are a Provider, contact your reliers and ask them to perform a “test run” login to any sites they use on Election Day or in the days immediately following.

Tips for Entering Election Day Registrations in SVRS

If you will have additional staff entering EDR Registration or if you will be using computers that you don't usually use for SVRS tasks, test all of the computers you plan to use to ensure that they have the proper certification. This is a great opportunity to be proactive and eliminate the frustrations from technical problems that can crop up on a busy Election Day.

EDR Verification Postcards

Legislative Update

The legislature recently passed a law requiring clerks and the Government Accountability Board to track and report statistics regarding voter verification postcards that sent to voters registering on Election Day if the election includes a state or federal office, or a statewide referendum.

The first postcard reporting will be for the November 4, 2014 election. The postcards will not be used for any elections in 2015, but will go into effect for all applicable elections beginning in January, 2016.

Specific Information about Reporting

The statute requires reporting on the following:

- How many postcards were sent
- How many postcards were returned as undeliverable because the voter didn't reside at the address they provided when they registered
- How many voters were inactivated as a result
- How many referrals were made to the District Attorney as a result

Clerks will enter the required information on the WEDC website. The G.A.B. is currently working on developing questions to best capture the information.

Because the questions for WEDCS are still being developed, we can't tell you exactly what they will be. Some examples for why we need to continue working on the data collection form:

- A postcard is returned as undeliverable, but it is a post office error
- A voter moves after the election but before the postcard is received
- An SVRS user made a typographical error to the voter address

The G.A.B. continues to work through all of the possible scenarios that can result in a postcard being undeliverable. These various circumstances continue to inform the development of the WEDCS form.

The G.A.B. is working to make the reporting easier and more automated for the future.

As we get closer to the election, more detailed training material will be posted.

Election Setup in SVRS

Setting up Polling Place Assignment & Reporting Units Plans

Polling Place Assignment Plans (PPAP) and Reporting Unit Plans (RUP) are associated with the election at the time the election is inherited; therefore, it's important to setup the PPAP and RUP prior to inheriting the election.

Defining the RUP

Election results are reported by “reporting units.” A reporting unit may be one ward or a group of wards. Currently, municipalities with a population of 35,000 or more must report election results by individual ward. In these municipalities, each individual ward is a reporting unit. Wards may be combined by resolution only if one of the wards has a population of less than 20 voters. Municipalities with a population of less than 35,000 may, by resolution, combine two or more wards that are in the same districts and report the combined results. Wis. Stat. §5.15(6)(b).

In order to combine two or more wards into one reporting unit, each ward must be made up of like districts. The reporting units for nonpartisan primaries and elections may differ from the reporting units for a partisan primary or general election. Clerks must be mindful of the district composition of the wards within their municipality.

Each municipality should set up a Reporting Unit Plan that matches the way their machines are programmed by the County.

Defining the PPAP

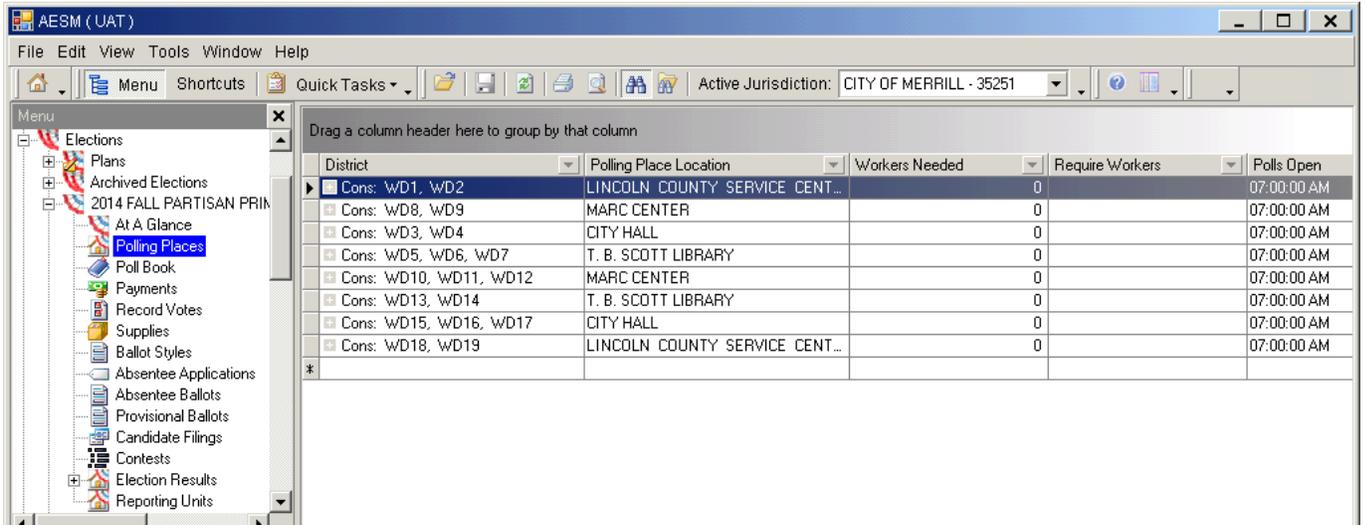
The PPAP designates polling place by Ward and determines how a poll book is created. The PPAP should always match the RUP.

General Rules for Creating and Using PPAPs and RUPs

- PPAPs and RUPs can be used over and over. Often there is no need to create a new PPAP or RUP for each election.
- A PPAP or RUP that has been used before can be used again *regardless of its name*. For example, an RUP or PPAP named “2012 Fall Election” may be used this year so long as the ward assignments are unchanged.
- If a new PPAP or RUP is required, *do not change/edit an existing PPAP or RUP if it has been used in a previous election*. If you need to make even a minor change to an existing plan that has been used before, simply create a new PPAP or RUP.
- If you made a mistake during the initial setup, don't worry! You can change your PPAP and RUP after the election has been inherited. However, you want to do so in a timely manner.
- When a voter uses the MyVote website to look up their polling place, MyVote pulls the information directly from the PPAP associated with the upcoming election. If the information in SVRS is incorrect, the voter might go to the wrong polling place.

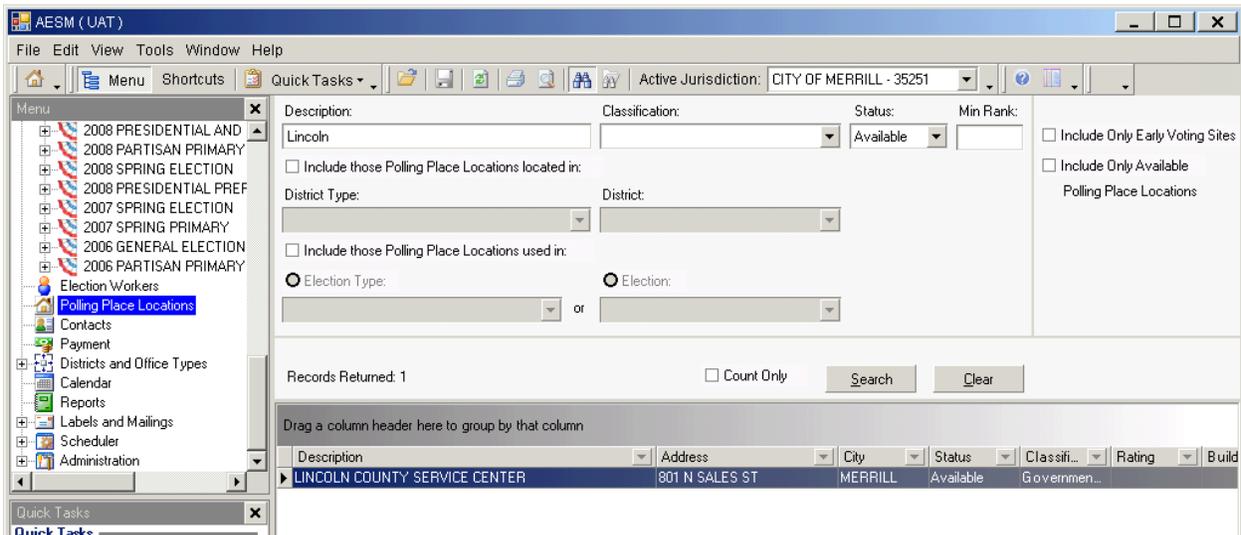
Reviewing Polling Places for the Upcoming Election

Review the polling place assignments in SVRS to confirm the PPAP has been setup correctly. To do this, select for Polling Places under the Election node. This will display the polling places assigned for the current election.



It is also important to periodically review the address associated with the polling place from time to time. If the address is incorrect in SVRS, the polling place address displayed for the voter in MyVote will also be incorrect. To check the address, select the Polling Place Locations node from the main menu.

Enter all or part of the polling place location you wish to review (or ** to review all locations) in the Description field and Search. When the result(s) appears in the grid, check the address. If it is incorrect, double click on the location in the grid to open and edit the location.



Setting up Contests in SVRS

Importance of the Ballot Position

When a contest is created in SVRS and when candidate filings are added to that contest, the Ballot Position field determines how the ballot will display on MyVote, including how the ballot will be downloaded by UOCAVA voters.

Ballot Positions are assigned to contests according to the table found on page 17 of the Election Setup chapter of the SVRS manual. The ballot on MyVote will list each contest beginning with the contest with the lowest Ballot Position number to the highest Ballot Position number.

Ballot Positions which are assigned to Candidate Filings are based on the number of candidates running for the specific office contest (e.g. there are 2 candidates for mayor). By random selection, each candidate is assigned a ballot position number (in the mayoral example, one candidate will have Ballot Position 1 and the other would be Ballot Position 2). While the Ballot Position for the Contest is six digits for County and Municipal contests, the Candidate Ballot Position is usually only a single digit.

If the Ballot Position for either the Contest or the Candidate is left at the default of 0, that contest or candidate will not show on the MyVote ballot.

Entering Approved Write-in Candidates in SVRS

Approved write-in candidates must be entered into SVRS in order to properly display on the Canvass website. To enter the write-in candidate, follow the same steps provided for entering regular candidates but with a couple of minor adjustments:

- Name on Ballot: Add the words (WRITE-IN) following the candidates name.
- Status-Reason: Select Approved – Approved Write-in
- Ballot Position: Enter the highest number available. For example, if there are 2 regular candidates, the write-in candidate should be given Ballot Position 3.

The screenshot shows the 'Candidate Detail' form in SVRS. Several fields are circled in red to highlight important information for write-in candidates:

- Name on Ballot:** CHARLES C BROWN (WRITE-IN)
- Party:** Non-Partisan
- Status-Reason:** Approved - Approved - Write-In
- Ballot Position:** 2
- Contest:** Aiderperson (ward 01)
- Write-In?** (checkbox) is checked.

Other visible fields include: Candidate: BROWN, CHARLES C (715551234); Candidate Address: 2310 BROADWAY ST S, MENOMONIE, WI 547513955; Election: 2015 SPRING ELECTION 01; GAB ID#; Local Cand No.; Nomination Status; No. of Signature (0); Approximate (0); Approx. Pages (0); Submitted By; Staff Responsible; Filing Receipt No.; Supplemental; Suppl. Submitted Date; Created; Date Last.

Setting up Ballot Styles in SVRS

Ballot Style Facts

- Ballot Styles may only be generated if Milestone 3 is checked and Milestone 4 is unchecked.
- In SVRS, Ballot Style refers to which ballot a voter should receive (closely tied to the District Combo Code)
- The Ballot Style will print on the poll book and on the absentee labels

Ballot Style Tips

- Naming Ballot Style Descriptions to best effect
 - Put the most descriptive part of the name first. Only the first 15 characters (including spaces) will appear on the poll book
 - Use names that will be most meaningful to poll workers
 - Use the HINDI and the Month and Year of the election to create a distinctive description. SVRS will reject the Ballot Style Description if it has been used before.

Performing Data Quality Tasks in SVRS

The quality of the data contained in SVRS impacts many of the election process. Therefore, data quality tasks should be performed regularly throughout the year; reminders for data quality performance are sent by the G.A.B. several times during the pre-election process.

The following tasks should be performed prior to issuing absentee ballots or setting up the poll book:

- Mapping Data Quality
- Potential HAVA Matches
- Check for pending voter applications

Mapping Data Quality

- Perform regular data quality review. This may involve reviewing your District Combo maps or running reports to fix the following:
 - Geocode Exceptions
 - Geocode Warnings
 - Geocode DC Mismatch
 - Boundary Exceptions
- Report any new annexations to G.A.B. so SVRS can be updated

HAVA Data Quality

Review potential HAVA Matches by searching by each type of match through the Voter Node or by running the WI Voter Match Report to check for the following:

- Felon Matches
- Death Matches
- Duplicate Voter Matches

Absentee Ballots – Using Absentee Lite or Full Absentee SVRS

Some relevant absentee dates for the 2014 November General Election

Thursday, September 18 - Deadline for municipal clerks to send absentee ballots to electors with valid requests on file for the General Election

Monday, October 13 – First Day for special voting deputies to conduct absentee voting for residents in nursing homes and certain qualified facilities for General Election

Wednesday, October 15 – Last day for electors to register by mail to vote in General Election

Monday, October 20 – First day for clerks to issue absentee ballots in person in the clerk’s office through Friday, October 31

Thursday, October 30 – Last day for electors (except for military electors and indefinitely confined electors) to request absentee ballots by mail for the General Election

Friday, October 31 - Military voters not away due military duty have until 5pm or the close of business to request an absentee ballot

Tuesday, November 4 Election Day – Military voters away from their normal polling location due to military duty have until 5pm on November 4th to request an absentee ballot by mail, email or fax

FULL Election Calendar of Election and Campaign Events 2014-2014 located here:

<http://gab.wi.gov/publications/2013-2014-election-events-calendar>

Part I: Using Absentee Lite for UOCAVA (Military & Permanently Overseas Ballots)

- **What is the Purpose of Absentee Lite?** To comply with the MOVE Act requirement that all military and overseas voters have a “free access” method to track their absentee ballot(s). This “free access system” for Wisconsin is the MyVote website (<https://myvote.wi.gov/>).
- **Who uses Absentee Lite?** It allows clerks who do not use SVRS to manage all their absentee applications and ballots to track only their UOCAVA ballots.
 - Absentee Lite must be used if a municipality is not using SVRS to manage absentee ballots. Counties enter UOCAVA ballots in SVRS on behalf of their Relier communities.

- **When must ballots be entered in Absentee Lite?** All UOCAVA absentee ballot must be recorded in SVRS “immediately” (in a manner that expedites the transmission of such absentee ballot (MOVE ACT)) after the ballot is sent to the voter.
- **UOCAVA Ballot Data Entry Notes:**
 - The voter’s record must have a UOCAVA status as “Military” or “Overseas”
 - Ballots cannot be entered until the election has been inherited and made Active by checking Milestone #2
 - Ballots may be entered at the municipality or county level
 - Add and Update ballots by using the Add UOCAVA Ballots and Update UOCAVA Ballots Quick Tasks under the specific election
 - No separate Absentee Application should be entered. These UOCAVA Ballots Quick Tasks manage the entire process.



- What information is needed to enter Add a UOCAVA ballot?
 - Voter Registration Number or Name
 - Date Ballot Sent
 - Ballot Type
 - Vote Location (how the voter requested to receive the ballot: email, fax, mail)
 - App Source

- **After entering a UOCAVA Ballot in SVRS, when will the voter be able to see it on MyVote?** Immediately! MyVote is automatically updated with this information.

- **What are the advantages of voters using MyVote for absentee ballot delivery?**
 - Simplifies compliance with the MOVE Act and Wisconsin Statutes. The “online” ballot was developed specifically to minimize disenfranchisement of UOCAVA voters and is available only to them.
 - The ballot is available anywhere an internet connection and printer are available for the voter.
 - Fewer undeliverable ballots, especially for Military voters who are frequently away from a fixed mailing address.
 - An Absentee Ballot is automatically generated and recorded as issued in SVRS when downloaded. UOCAVA voters automatically receive an email notifying them of their ballot availability. This occurs automatically when Milestone #4 is checked in SVRS (which specifies that ballot styles have been generated).
 - Thus, it is important to stress the importance of an accurate email address.
 - Instructions for completing and returning the ballot are included for the voter.
 - **PLEASE NOTE:** It is important that clerks honor a request from a UOCAVA voter who would like their ballot by mail, fax, or email.
 - But clerks can certainly educate UOCAVA voters about MyVote and some of the benefits.

****Finally, the MOVE act is aggressively enforced by the U.S. Dept. of Justice.** It is very important that ballots be mailed by September 18 for any UOCAVA absentee requests received by September 17, 2014 (48 days prior to the 2014 General Election). **

Part II: Full Absentee Management

Using the **Absentee Applications** node under the Election

- Searching for **Approved** applications will inform you of the number of current, active applications for the election.
 - These can be filtered by **Application Type**, such as:
Permanent, Military, Regular
 - These can be filtered by **Voting Location**, such as:
Via Mail, SVD Care Facility, Via Email, Online

Records Returned: 447 Count Only

| Name | Voter Reg Num | Soc Sec Num | Driver's License... | Date Of Birth | Gender | App Type | App Status |
|------------------|---------------|-------------|---------------------|---------------|--------|-----------|------------|
| AAAA, JAMES F | 0014257267 | | | 7/16/1920 | | Permanent | Approved |
| AAAA, JAN L | 0014232078 | | | 1/8/1935 | | Permanent | Approved |
| ANDERSON, LIZ M | 0014248200 | | | 10/16/1931 | | Permanent | Approved |
| ANDERSON, WALTER | 0014247668 | | | 9/15/1929 | | Permanent | Approved |

- The + indicates that a ballot has been issued for this election. The ballot may be in Issued, Cancelled or Returned status, but the + indicates that some ballot activity has occurred under for this application. By clicking on the +, you can see the ballot record.

The screenshot shows a web application interface for election management. On the left is a navigation tree with 'Absentee Applications' selected. The main area contains search filters for 'Date of Birth', 'Application Type', 'Application Status' (set to 'Approved'), 'Application Date', 'Ward', 'Voting Method', 'Voting Location', 'Ballot Status', 'Ballot Status Reason', and 'App Source'. Below the filters, it shows 'Records Returned: 625' and a 'Count Only' checkbox. A table displays search results for 'AAAA, JAMES F' with columns for Name, Voter Reg Num, Soc Sec Num, Driver's License, Date Of Birth, Gender, and App Type. A red arrow points to a '+' icon next to the name, which is expanded to show a table of ballot records. The ballot table has columns: Election, Descrip..., Ballot Type, Ballot Status, Ballot Status Re..., Date Ballot Gen..., Date Ballot Sent, and Date Ballot Re. One record is shown for '2014 FALL PAR...' with Ballot Type 'Official', Ballot Status 'Returned', and Date Ballot Re '7/11/2014'.

- Typing a double asterisk ** into the Last Name field will return all Absentee Applications (up to 1000 records).
 - If you use the Count Only checkbox, it will provide a numeric count only.
 - The double asterisk entry works in other nodes as well, such as Absentee Ballots.

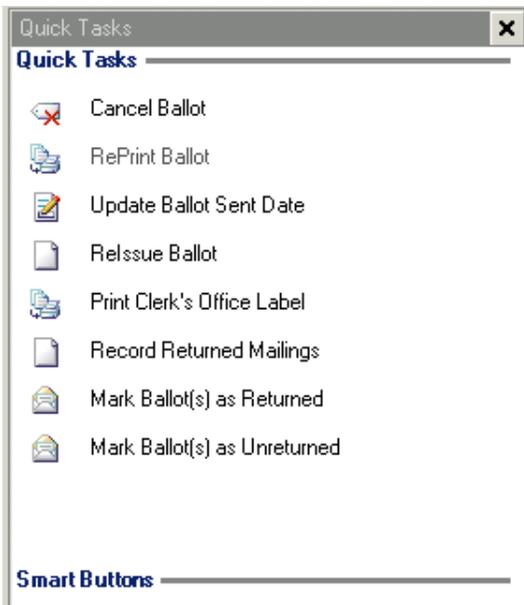
Here, I filtered only for Approved applications and used the ** in the Last Name field:

This screenshot shows the same application interface but with the search filters modified. The 'Last Name' field contains '**', and the 'Application Status' dropdown is set to 'Approved'. The 'Records Returned' count is now 738. The 'Count Only' checkbox is checked. The table below the filters is empty, indicating that the search results are filtered to show only approved applications.

Using the **Absentee Ballots** node under the Election

| Name | Ballot T... | Ballot St... | Ballot Statu... | Date Ballot Gen... | Date Ballot Sent | Date Ballot Returned | B all... | Mailing ID |
|------------------|-------------|--------------|-----------------|--------------------|------------------|----------------------|----------|------------|
| AAAA, JAMES F | Official | Returned | Returned | 6/25/2014 | 6/25/2014 | 7/1/2014 | NP-1 | 136147 |
| ▶ AAAA, JAN L | Official | Returned | Returned | 6/25/2014 | 7/3/2014 | 7/11/2014 | NP-1 | 136243 |
| ANDERSON, LIZ M | Official | Returned | Returned | 6/25/2014 | 6/25/2014 | 8/4/2014 | NP-2 | 136148 |
| ANDERSON, WALTER | Official | Returned | Returned | 6/25/2014 | 6/25/2014 | 7/7/2014 | NP-1 | 136148 |

- Ballot Status
 - Issued (and Issued Online), Returned, Cancelled
- Date Ballot Generated
 - This is auto-populated as soon as the ballot label is processed and queued.
- Date Ballot Sent
 - This is auto-populated with the date the ballot label was printed (or the date that it was downloaded on MyVote)
- Date Ballot Returned
 - Clerk office staff updates these dates, as ballots are returned.
- Mailing IDs are automatically generated by SVRS and can assist in tracking the absentee ballot
- Quick Tasks



Cancel ballot. Multiple rows can be highlighted at once.

Reprint a Ballot. This will print a new label, change the Mailing ID (replace the existing Mailing ID with a new ID) but it *will not* create a second ballot record.

Update Ballot Sent Date. Ballots can be generated days prior to actually being sent.

ReIssue Ballot. This will print a new label and *will* create a second ballot record with a new Mailing ID.

Record Returned Mailings. Utilizes the Record Returned Mailings wizard, in which Mailing IDs are scanned in.

Mark Ballot(s) as Returned. Does not utilize a Mailing ID.

Absentee Ballot Log

Print Report

Select Report Step 1 of 2

Category: Absentee

Reports

- Absentee Ballot Listing
- CLERKOFF Absentee Label 2x5 Double
- CLERKOFF Absentee Label 2x5 Single
- WI Absentee Application Ballot Log**
- WI Absentee Application Ballot Log - ALD - WARD

WI Absentee Application Ballot Log

Absentee Applications Ballot Log

ELECTION: General Election U202 May 01

| Name and Address | Ward | App. Issued | App. Received | Ballot Issued | Ball Rec |
|---|------|-------------|---------------|---------------|----------|
| Smith, Shari Lynnette 42 County Rd 370 Hill, CO 80751 | 06 | 01/20/04 | | 03/01/05 | 03/11 |

Delete Modify Layout Next

WI Absentee Ballot Log – The standard report.

WI Absentee Ballot Log_ALD_Ward – Breaks apart absentee ballots so each ward begins on a new page.

Other formatted reports include:

Absentee Application Listing

Absentee Ballot Listing

These reports (particularly the Absentee Ballot Listing Report) are formatted nicely for an Excel export. However, these reports by default include voter dates of birth. These must be removed if this is going to your Log used at the Polling Place (as it is a public document). These reports can be customized to remove the dates of birth. If you need any assistance with this, please contact the GAB Help Desk.

Canceled ballots do not appear on the Absentee Ballot Log. If a ballot needs to go to the Polling Place (e.g. to be rejected for lack of a witness signature), it must remain in Returned status so that it does appear on the Log.

Ballots which do not need to go to the Polling Place, for example those returned undeliverable, can be cancelled immediately in SVRS.