WISVOTE MID-YEAR ROUND-UP

May 21, 2019

INTRODUCTION

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AGENDA

Four-Year Maintenance
Who, What, When, Why, How?

EDRs and Addressing
Standard EDRs
Quirky EDRs

Keeping WisVote Tidy for 2020
DMV Checks
Reg. List Alerts

Reconciliation Comments

Badger Book
Present and Future

HOW WERE THESE TOPICS CHosen?

Call Log

Colleagues

Upcoming initiatives
Why do we do it?
- Helps clean up pollbooks
- Improves data quality
- Mandated by State Law

How is it done?
- A postcard is sent out to registered voters who have not voted in the previous four years
- Electors who sign and return their postcard remain on the poll books
4-YEAR MAINTENANCE

When does it take place?
Every two years
Must be done in the summer following General Election
Postcards will be sent to voters by June 15
Elector must return the postcard to clerk by July 31

Who does it?
WEC
Sends out 4-Year Maintenance Postcards
Generates list of names from WisVote
Once list is generated, voters marked with status: Active - Suspended

Municipal Clerks
Completes all Election Participation by May 17
Receives returned postcards from voters
Enters response information into WisVote
4-YEAR MAINTENANCE

Who receives it?

Sent to voters who:

Currently are in Active Status
Registered more than four years ago
Registered on or before 12-31-2014

Have not voted in last 4 years
Since 1-1-2015
Make sure Voter Participation is completely up to date by May 17

Military voters are NOT sent 4-Year Maintenance postcards

4-YEAR MAINTENANCE:
WHAT DOES IT LOOK LIKE?

A: Mailed to Voter
B: Returned to Clerk
4 YEAR MAINTENANCE: WHAT DOES IT LOOK LIKE?

1. Return Address = Municipal Clerk
2. Attention
3. Voter’s Address

4. Explanation of Notice
5. Guidance in Spanish

4 YEAR MAINTENANCE: WHAT DOES IT LOOK LIKE?

1. Municipal Clerk
2. Directions for Voter
3. Signature
4. Return Address for Voter
5. Barcode for Scanning Response
4-YEAR MAINTENANCE: HOW ARE THE RESPONSES RECORDED

How is it recorded and tracked?

Through WisVote!

Recorded as one of two categories
1. Request Continuation
2. Returned as Undeliverable

1. Request Continuation

Means that voter wants to continue being registered to vote at their current address

Voter status changes to Active Regular

If voter indicates on postcard that they have voted in the past 4 years, investigate why they were on list

What if postcard is returned after July 31st?

If postcard is postmarked AFTER July 31, it is not a valid continuation request

Voter must re-register
4-YEAR MAINTENANCE

2. Returned as Undeliverable

Most Common

After marking in WisVote as Undeliverable, voter record is deactivated

What if postcard is returned after July 31st?

Continue to record Returned as Undeliverable postcards in WisVote

4-YEAR MAINTENANCE:
HOW TO RECORD IN WISVOTE

Tracking responses from list

1. On the Easy Navigate page
   click the Mailings tile

2. Make sure to change the Systems View to 2019 4-Year Maintenance No Response
   and select the voter(s) whose response you would like to record
4-YEAR MAINTENANCE:
HOW TO RECORD IN WISVOTE (CONT.)

3. Select the response from the two options at the top of the screen

```
UNDELIVERABLE  REQUEST CONTINUATION
```

4. Enter the response date by clicking on the calendar and click submit

![Calendar Interface]

Record by Scanning

1. On the Easy Navigate page click on the Mailings tile

2. Select Scan Response at the top of the screen

```
SCAN RESPONSE  RUN REPORT  EXPORT TO EXCEL  CHART PANE
```

3. Select the Response Type

```
Scan Mailing Response

Response Type:
- SELECT
- UNDELIVERABLE
- REQUEST CONTINUATION
```

![Response Type Selection]
4-YEAR MAINTENANCE:
HOW TO RECORD IN WISVOTE (CONT.)

4. Enter the **Response Date**

5. Scan or manually enter the **Mailing ID**
   - If manually entered, click **Record**
   - All scanned records from the current session will appear in the list below
   - Close the window when finished

4-YEAR MAINTENANCE

**Returned to Have Registration Deactivated**

Death, Felony, or new Address

Voter Request

After marking in WisVote, voter record is deactivated

What if postcard is returned after July 31st?

Continue to record Request for Deactivation postcards in WisVote
4-YEAR MAINTENANCE: HOW TO RECORD IN WISVOTE (CONT.)

Tracking a Request to Deactivate Registration

1. Find the voter record whose registration must be deactivated

2. Click Registration History and double click on the Voter Registration Information

3. At the top of the screen click Deactivate

Changing Response Type for Previously Tracked Postcard

1. Find the voter whose response must be corrected through the Mailings tile

2. Select the mailing record to correct

3. Select the correct response type, enter the date, and click Submit
4. Click on the voter’s name to open **Voter Record**

- If mailing record needs to be switched TO **Request Continuation**
  You must reactive the voter record

- If mailing record needs to be switched TO **Undeliverable**
  You must deactivate voter, choose the correct status, and click **Deactivate**

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**EDR AND ADDRESSING**
ELECTION DAY REGISTRATIONS

Election Day Registrations
- New Registrant
- Change of Address
- Change of Name

Post – Election Data Entry
- Standard EDRs
- Unique Situations… hopefully
  - Incomplete EDRs
  - Out of Jurisdiction EDRs
  - Deleting Duplicate EDRs

STANDARD EDR: STEP BY STEP

1. Click the Elections tile; the name of the election; and open the Poll Books tab

2. Click the name of poll book

3. Click the EDR button
4. Enter the required information and click search

5. If a match is not found, click New Voter Record message bar; if match is found click the Update button

6. Continue entering required information

7. After entering a bit of the home address, click the magnifying glass to display search results

8. If the address is not found, click Look Up More Records
9. Continue filling in all required fields; to save the EDR record click **Save** and **Close**

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**INCOMPLETE EDR: STEP BY STEP**

Follow the same steps as a regular EDR, but click the **Incomplete Application** check box.
INCOMPLETE EDR: STEP BY STEP (CONT.)

Checking **Incomplete Application** will process EDR, record a vote, then inactivate the Voter

A letter should be sent to voter

- Go to the **Voter Record** of the affected person
- Select the **Letters** button & click **EDR - Incomplete Registration**
- Letter can be printed in PDF or Word

‘OUT OF JURISDICTION’ EDR: STEP BY STEP

Entered when voter EDRs and votes in wrong Jurisdiction

1. Start entering EDR as usual but skip **Home Address** and check **Address Outside Jurisdiction** check box

2. You will then enter the voter’s **Non-Jurisdictional Address**

3. Click **Save and Close**
OUT OF JURISDICTION EDR: STEP BY STEP (CONT.)

4. Go to **Letters** tab in the **Voter Record** and print correct letter

![Screen shot of Voter Record interface]

Once Completed:
- EDR has been created
- Vote has been counted
- Voter record switched to **Inactive**
- Letter must be sent to voter

DELETING DUPLICATE EDR: STEP BY STEP

*If duplicate EDRs are entered:*

1. Delete from EDR Poll Book

![Screen shot of EDR Poll Book]

2. Merge the two Voter Records
ADDRESSING

Preemptively add addresses
   Add new addresses
   Ask for help with apartments if needed

Changing a voter’s address
   If voter moved, they must re-register
   If address is entered in WisVote incorrectly accidentally, can make a data entry change to the address

ADDRESSING:
ADDRESS DATA ENTRY CHANGE
STEP BY STEP

Do **NOT** edit actual address - this will change the address for everyone who lives there

Edit the Voter: Record
1. Instead of clicking on the text, click magnifying glass
ADDRESSING: ADDRESS DATA ENTRY CHANGE
STEP BY STEP (CONT.)

2. Once field is highlighted, type correct address

3. Choose the correct address from drop down menu; Map will then change to reflect correct address

4. Click Save & Close
REG LIST ALERTS & DMV CHECKS

Three Types of Reg List Alerts

- Deceased Alerts
- Felon Alerts
- Duplicate Alerts

Stay on top of these

Improves with voter list maintenance

Helps identify ineligible voters in WisVote
**REG LIST ALERTS: STEP BY STEP**

**Duplicate Voter**

1. Click on **Reg List Alerts** tile

2. On **Needs Review – Active Voters** open Reg List Alert, click the name under **Alert Name**
REG LIST ALERTS: STEP BY STEP (CONT.)

3. Compare the duplicate info to determine if the records match.

4. Choose to accept, decline, or return to the view page (Cancel).

Deceased Voter
1. Click on Reg List Alerts tile
2. On Needs Review – Active Voters open Reg List Alert, click Alert Name.
REG LIST ALERTS: STEP BY STEP (CONT.)

3. Compare the ‘Voter’ and ‘Deceased’ info to determine if the records match

4. Choose to accept, decline, or return to the view page (Cancel)

REG LIST ALERTS: STEP BY STEP (CONT.)

Felon Voter
1. Click on Reg List Alerts tile
2. On Needs Review – Active Voters open Reg List Alert, click Alert Name

<table>
<thead>
<tr>
<th>Alert Name</th>
<th>Date of Birth</th>
<th>Alert Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hansen, Steven John</td>
<td>3/8/1941</td>
<td>DECEASED</td>
</tr>
<tr>
<td>Sencibaugh, Vera H</td>
<td>12/6/1974</td>
<td>DUPLICATE</td>
</tr>
<tr>
<td>Dragseth, Loretta M</td>
<td>4/28/1950</td>
<td>FELON</td>
</tr>
</tbody>
</table>
REG LIST ALERTS:  
STEP BY STEP (CONT.)

3. Compare the Voter and Felon info to determine if the records match - click on full name for more info

4. Choose to accept, decline, or return to the view page (Cancel)

REG LIST ALERTS: 
STEP BY STEP (CONT.)

5. Go to voter record and send Felon Letter
DMV CHECKS

Run

Anytime there is a new voter registration

Run

Anytime there is something updated in the Name, DOB, DL, or SSN

Run

On an nightly basis

Run

Only for data quality, not as a test for voter eligibility

DMV/HAVA CHECKS: STEP BY STEP

1. Click on the DMV Checks tile
DMV/HAVA CHECKS:  
STEP BY STEP (CONT.)

2. Click the voter in the **DMV Check Name** field to open the **DMV Check Case**

<table>
<thead>
<tr>
<th>DMV Check Name</th>
<th>Reason</th>
<th>DMV Check Date</th>
<th>Driver License or WI State ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joline K</td>
<td>3-Name Does Not Match</td>
<td>7/19/2016</td>
<td></td>
</tr>
<tr>
<td>Nicholas M</td>
<td>5-No Record of DL Number</td>
<td>7/15/2016</td>
<td></td>
</tr>
<tr>
<td>Deloris A</td>
<td>2-No Matches Found</td>
<td>7/12/2016</td>
<td></td>
</tr>
</tbody>
</table>

3. Compare the Voter information fields with the registration information submitted by the voter to see if a data entry error caused the DMV Check to fail

51

DMV/HAVA CHECKS:  
STEP BY STEP (CONT.)

If data entry error was made:

4. Click voter’s name on the **DMV Check Case** to open voter record

5. Make any corrections needed, click **Save & Close**, and another DMV Check will occur overnight

52
DMV/HAVA CHECKS:
STEP BY STEP (CONT.)

If data entry error was not the cause of the DMV check to fail:

4. Click on the full name of the voter

5. When Voter Record is opened, click Letters and DMV Check Non-Match Letter

6. After printing/exporting the Non-Match Letter, click Cancel on the Voter Record, and click Continue
7. When the DMV Non-Match case is opened
   click **No Further Action Required**

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No Further Action Required

Also used when no data entry error occurred, but clear explanation exists for DMV Check fail -
Use best judgement for this

Any pre 2017 DMV Checks
RECONCILIATION

**EL-104/Inspectors’ Statement**

Must enter before reconciling election

**Comments**

Only use if the Voter Statistics or EDR sections do not reconcile

**AND**

The source cannot be fixed in WisVote
RECONCILIATION: COMMENTS

What is a comment?
- Comments are overrides
- Override takes effect during next overnight update
- Overnight update ≠ staff approval
- Staff May Review/contact for clarification

What should a comment contain?
- Brief explanation of the discrepancy
- 300 character limit

What should NOT be in a comment?
- Names of voters or staff
- Questions directed at WEC staff
- Comments if section reconciles
- Avoid assigning blame
What is the Post Supplemental Poll Book?

Voters whose registration was entered into WisVote after the poll book was printed and after Election Day

Need for IPAV after poll books have been printed
POST SUPPLEMENTAL POLL BOOK DIALOGUE: STEP BY STEP

• Get to the **Voter: Record** for the voter who needs to be added to the **Post Supplemental Poll Book**

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**Click the ellipsis on the Voter Record**

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**Click Start Dialog**

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**The process is selected by default.**

**Click Add**
POST SUPPLEMENTAL POLL BOOK DIALOGUE: STEP BY STEP (CONT.)

The Election and Jurisdiction should be selected by default.

Click Next.

The Election Plan should be selected by default.

In most cases, you won’t need to select the Reporting Unit Name or the Ballot Style Name on this screen.

Click Next.
POST SUPPLEMENTAL POLL BOOK DIALOGUE: STEP BY STEP (CONT.)

The reporting unit and ballot style will default to the first reporting unit or ballot style in the municipality. To choose a different reporting unit, change the selection in the drop-down list.

Select the correct Reporting unit from the list based on the Ward in which the voter resides. Follow the same steps for selecting the ballot style. To record a vote Yes is selected by default. Click Next.
POST SUPPLEMENTAL POLL BOOK DIALOGUE: STEP BY STEP (CONT.)

Select the vote method.

Click Next.

Click Finish.
On the Poll Book Information Page, the voter is now shown in the Post Supplemental section.
BADGER BOOK

Development of data upload complete
New purchasing window later this year

CONCLUSION
TOPICS COVERED

Four-Year Maintenance
Who, what, when, where, why, how?

EDRs and Addressing Fun
• Standard EDRs
• Quirky EDRs

Keeping Tidy for 2020
• DMV/HAVA Checks
• Reg. List Alerts

Reconciliation Comments

Badger Book
Present and Future