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Poll Book



Before Setting Up and Printing Poll Books, Polling Place Locations must be assigned to districts (e.g. ward, municipality) within the election, ballot styles must be generated, and Milestone #4 – Ballot Style Finalized needs to be checked as complete.

Setting Up and Printing Poll Books is a two-step process. Step One is **Set Up Poll Books** and can be done any time after checking Milestone #4 – Ballot Style Finalized. Step Two is **Print Poll Books**. Voter registrations can continue to be entered up until the time printing poll books occurs. Voters entered after setting up poll books, but before printing poll books will appear on the poll books.



Poll books may be printed after the close of business on the regular registration deadline (20 days before the election date), but need to include all mail-in registrations postmarked by that date. All registrations received after the deadline and added to SVRS up until the poll books are printed will be on the Supplemental Poll List. All registrations received after poll books are printed need to be added manually to the Supplemental Poll List. See [Voter Application](#) section for more information regarding Late Registrations.

Poll Book Configuration

Active registered voters can be organized in poll books in different ways, depending on municipality preference. This is initially set up through a Polling Place Assignment Plan (PPAP) used when setting up an election. If no PPAP was used when setting up an election, polling places need to be assigned to districts within the election. Use the chart below to determine what District Type to use to set up poll books for the municipality.

If you have:		Polling Place Assignment	Resulting Poll Books	Choose this District Type
Ward(s)	Polling Location(s)			
Each ward	In different polling place location	Each Ward assigned to a distinct polling place location (e.g. Ward 1 assigned to Fire Station and Ward 2 assigned to Jefferson Elementary School, etc.)	<ul style="list-style-type: none"> 1 poll book for each ward Alphabetized by voter name All voters in the relevant ward 	Ward
Each ward	In 1 polling place location	2 or more Wards assigned to the same physical location. (e.g. Ward 1 assigned to Fire Station, and Ward 2 also assigned to Fire Station)	<ul style="list-style-type: none"> 1 poll book for each ward Alphabetized by voter name All voters in the relevant ward 	Ward
Multiple wards	In 1 polling place location	2 or more Wards assigned to 1 polling location (Consolidated)	<ul style="list-style-type: none"> 1 poll book for each polling place location Alphabetized by voter name (Co-mingled across wards) 	Ward and then use Consolidating Districts Instructions
All wards within an aldermanic district	In 1 polling place location for each aldermanic district	All wards within an aldermanic district vote in the same polling place location	<ul style="list-style-type: none"> 1 poll book for each aldermanic district All voters within aldermanic district, regardless of ward, listed alphabetically 	Aldermanic
All wards in municipality	In 1 polling place location	Regardless of the number of wards, all voters vote in same polling place location	<ul style="list-style-type: none"> 1 poll book for entire municipality All voters, regardless of ward, listed alphabetically 	Municipality

SVRS Election Cycle Checklist (Set Up & Print Poll Book portion)

Instructions for completing this portion of the SVRS Election Cycle Checklist are contained in this module of the participant manual. See Appendix B for the complete checklist. Instructions for additional steps are contained in other election-related tabs.

Milestones and Activities	Details
<input type="checkbox"/> 8. Set Up and Print Poll Books	
<input type="checkbox"/> 9. Continue to Add Absentee Applications, Issue Absentee Ballots and Generate Labels (See Absentee section for information.)	
<input type="checkbox"/> 10. Check Milestone 5: Poll Books Printed	<ul style="list-style-type: none"> If checked, poll book printing is completed for the election

Set Up Poll Book

- ☒ Poll books can be set up either alphabetically by last name or alphabetically by street name. If your municipality uses Poll Books organized by street name, you need to contact the SVRS Help Desk before the first time that you set up and print poll books.

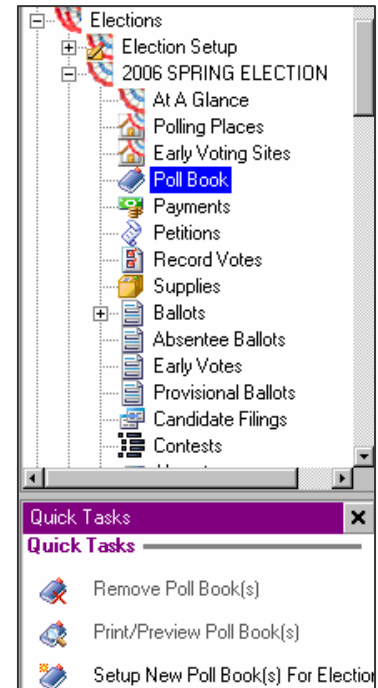
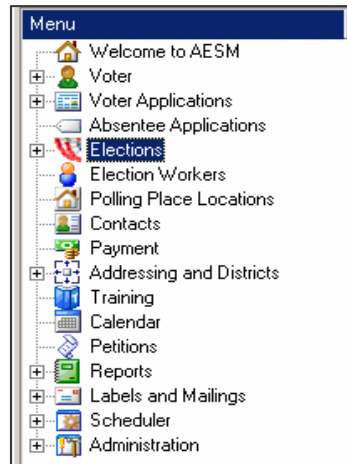
Items to check in SVRS before the Set Up Poll Book step

- ☐ Do you have a polling place location assigned to each ward, aldermanic district, or municipality within your election?
- ☐ Have you generated ballot styles in SVRS, and are they correct?
- ☐ Have you checked Milestone #4 – Ballot Styles Finalized?

If all answers are “yes”, you may proceed to the Set Up Poll Book step.

Set up Poll Book

- Expand (+) the **Elections** node on the Main Menu Tree.
- Expand (+) the selected election.
- Click the **Poll Book** sub-node under the selected election
- Click the **Setup New Poll Book(s) for Election** Quick Task. The Poll Book Wizard appears.



5. Select **One for each Election Polling Place** radio button to create a poll book for each active polling place. This is usually the case.



To create poll books for a specific district type, select the **District Type** radio button and choose the appropriate value from the drop-down list. As an example, a poll book can be set up for the entire municipality by selecting **District type "Municipality"**. This could be used in the Clerk's office to check for registered voters at any time even on election day when voters are showing up and need to be verified.

6. Click the **Next** button to proceed to the next screen of the Wizard.
7. None of the options on the **Advanced Voter Options** are used in Wisconsin. Therefore, click the **Next** button to proceed to the **Format Poll Book** screen.

8. The **Formatting Options** has the first option set as the default regardless if this check box is checked. The third option may be chosen if the poll book is to be split at specific letter(s). Click the **Next** button to continue.

Create Poll Books By _____

☒ One for each Election Polling Place

☐ District Type _____

Create Poll Books For _____

☒ Every Election Polling Place being used for this Election

☐ One or more selected Election Polling Places

Help < Back Next > Cancel

Advanced Voter Options

Select from the options below to specify which voters to include on the poll books and what information should be included for each voter

Data to Include: _____

- ☐ Voter Signature Images
- ☒ Voter Addresses
- ☒ Voter District Details
- ☐ Warning Messages

Advanced Voter Options: _____

- ☐ Only voters affiliated with this political party _____
- ☐ Voters who are too young to participate in election
- ☐ Voters who registered after the registration close date
- ☐ Only voters who are property owners

Help

< Back

Next >

Cancel

Format Poll Book

Specify final formatting options and click Next to generate the Poll Book(s)

Formatting Options: _____

- ☐ Start a new page (page break) on the first letter of the last name
- ☐ Combine Poll Books into one single Poll Book
- ☐ Start new Poll Book(s) on the following letter(s) of the last name:
- A (comma-delimited) list

Help

< Back

Next >

Cancel

9. Click the **Finish** button to set up poll book(s).
10. Click the **Menu** button to return to the original screen.
11. Check to make sure the correct number of poll books have been set up based on the criteria entered through the Polling Place Assignment Plan and Poll Book options. Review the chart on page 3 "Poll Book Configuration" if a different configuration of poll books is needed. If the poll books are not as expected, remove poll books, change polling place locations and poll book options, and regenerate poll books.

Drag a column header here to group by that column				
Printed	District Type	Districts	Title	Name Range
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - MACGREGOR HALL	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - FIRST BAPTIST CHURCH	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - PEACE LUTHERAN CHURCH	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - Election Office	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - FIRST CHRISTIAN CHURCH	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - MERINO TOWN HALL	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - HIGHLINE ELECTRIC	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - SACRED HEART CATHOLIC CHURCH PEETZ	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - ILIFF COMMUNITY CENTER	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - ST. PETERS HALL	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - PRINCE OF PEACE CHURCH	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - THE UNITED CHURCH OF CROOK	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - FIRE HOUSE YOUTH CENTER	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - IMMACULATE HEART OF MARY	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - ST. MARY'S HIGH	A to ZZ
NO	ALL	ALL VOTERS	Poll Book - Poll Books Test - WEBSTER UNIVERSITY	A to ZZ

Export, Retrieve, and Print Poll Book



The steps to printing a poll book are Export, Retrieve, and Print.



Poll books cannot be printed until after the close of business on the registration deadline (20 days before the election date). All registrations received after the deadline and added to SVRS up until the poll book(s) are printed will be on the Supplemental Poll List. All registrations received after poll book(s) are printed need to be added manually to the Supplemental Poll List.

Items to check before the Print Poll Book step

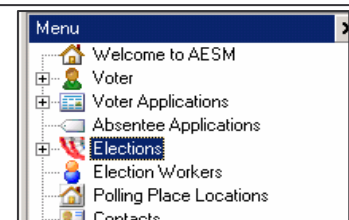
- ☐ Do you have a polling place location assigned to each ward, aldermanic district, or municipality?
- ☐ Are the district details and district combos the same as when ballot styles were generated?
- ☐ Have you checked and corrected any voters that have no district combo because their address has not been validated? (Use Reports to run the "Voters with No District Combo" report to verify.)
- ☐ Have you checked for any underage voters, usually caused by a data entry error in the birth date field? (Use the Voter Listing report and filter for condition of "Is Greater Than" and Value of the date of birth required to vote in the next election.)
- ☐ Have you checked to see if all Voter Applications have been processed? (Check in Voter Application that no voter applications are in "new" or "pending" status.)
- ☐ Counties: Have you checked to see if any voter applications are "new" or "pending" at the county level instead of being entered in a Relier municipality? (With the Active Jurisdiction as your county, check the Voter Application node for any voter applications with a "new" or "pending" status.)

If all answers are "yes", you are able to proceed to the Print Poll Book step.

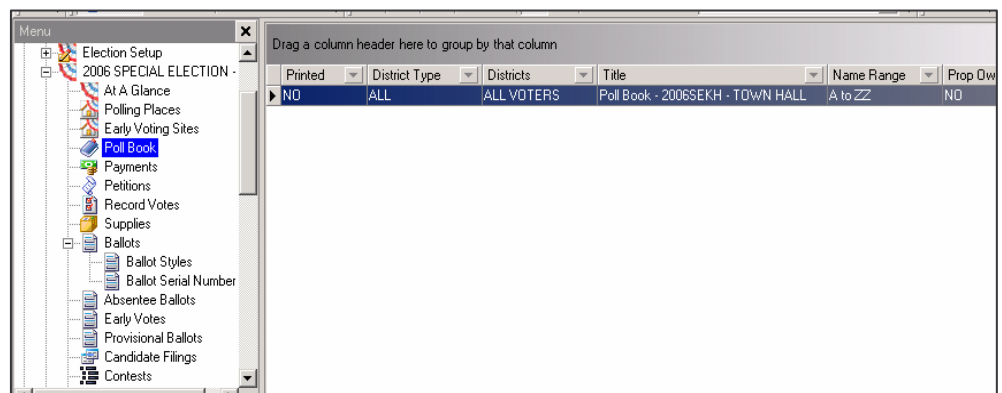
Export Poll Book

The first step in printing poll books is to export the file.

1. Expand (+) the **Elections** node on the Main Menu Tree.
2. Expand (+) the selected election.

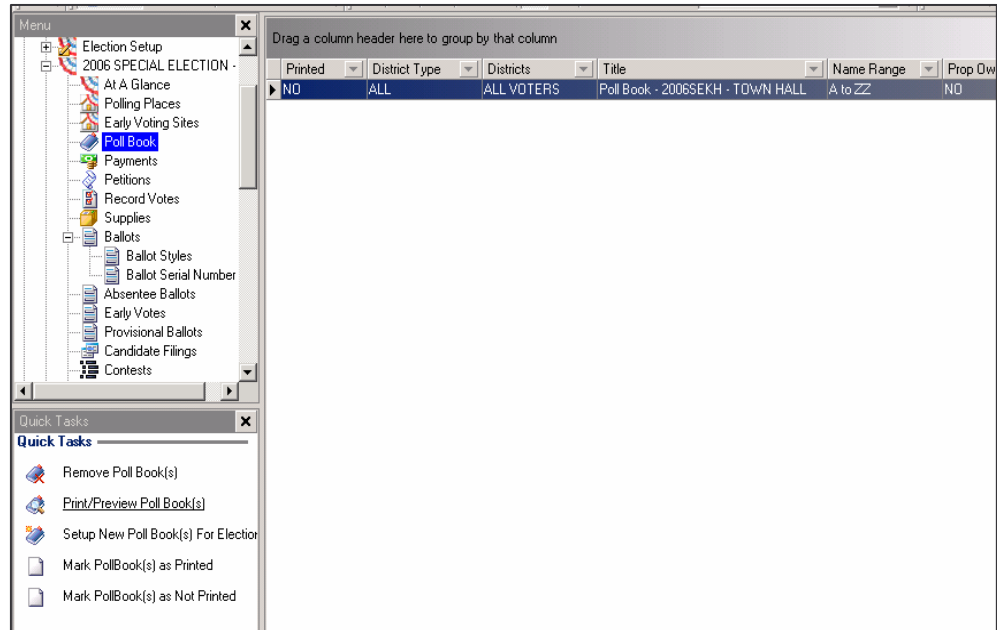


3. Click the **Poll Book** sub-node under the selected election to see a list of Poll Books which have been set up.

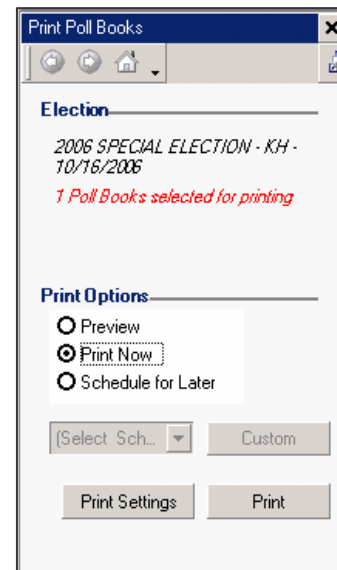


4. Select the Poll Book to print or preview by highlighting the record.

5. Select the **Print/Preview Poll Book(s)** Quick Task.



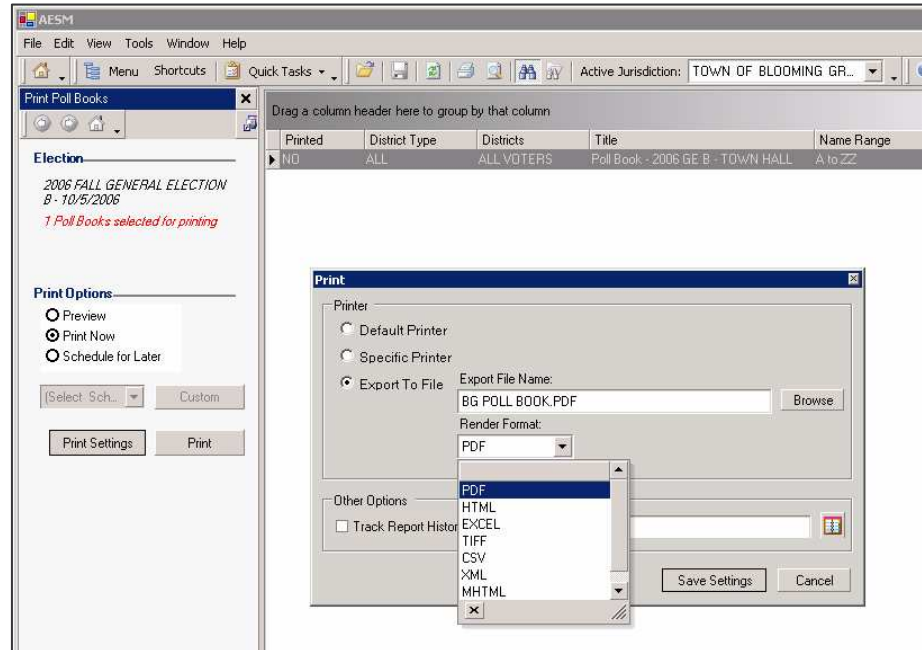
6. Note the options displayed on the **Print Poll Books** Task Pane.
 - a. **Preview:** The Preview option displays up to 50 voter records. By clicking on Preview, you are able to check to see that there are voters on your poll book before exporting and printing the poll book.
 - b. **Print Now:** The Print Now option will print the poll book directly to your printer.
 - i. A better option is to export the poll book as a PDF file. By creating a PDF file, you have a permanent electronic record of the poll book.
 - ii. If you choose to print the poll book directly, please be aware that if the poll book is large, the job might exceed a system default setting. You might receive a message, "Report exceeds interactive print time-out. Would you like to run this report as an immediately scheduled report?" If you receive this message, click Yes. The job will be automatically put into the scheduler. You will need to follow the instructions for retrieving a report to be able to print it.
 - c. **Schedule for Later:** Allows you to schedule the export or direct-print to run at a specific time.
7. Click on the **Print Settings** button.



8. In the Print dialogue box:
 - a. Select the **Export to File** radio button.
 - b. Click on the **Render Format** drop down list and select **PDF**.
 - c. Enter the name of the poll book being exported in the Export File Name field.
 - d. Click on the **Save Settings** button.



It is better to enter a new name than reuse an existing file name. SVRS may produce erroneous results when overwriting an existing file.



Additional information about naming and exporting files can be found in the [Print Standard Report](#) in the Reports section.

9. Select the Print now radio button (target).
10. Click the **Print** button in the Print Poll Books Task pane.
11. Click the **Yes** button when the message “Do you want to confirm that the Poll Book was printed?” appears. This will mark the poll book as printed.



*If you click **No** when the message “Do You want to confirm that the Poll Book was Printed?” appears, you can use the Quick Task **Mark Pollbooks as Printed** at a later time.*

12. Repeat steps 4 through 11 for each poll book.



Retrieve and Print Poll Book

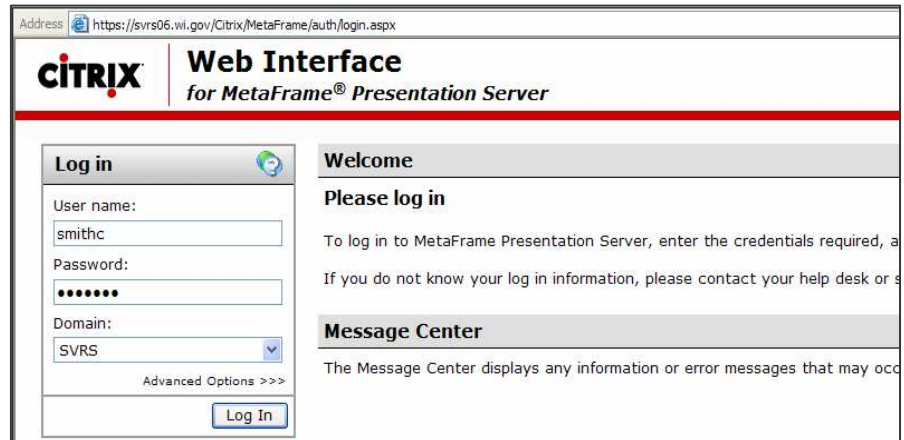


The exported PDF file of your poll book is stored in a **My Documents** folder located on a SVRS server in Madison. It is not the My Documents folder on your own computer. Follow these steps to retrieve and print poll book(s).

1. Log in to SVRS.



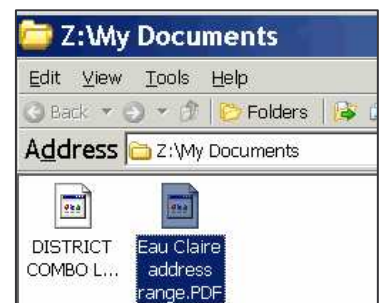
Even if you have been actively working in SVRS, you may still have gotten logged out of the Citrix Web Interface log in panel.



2. The Citrix Web Interface screen displays. This screen contains the AESM icon, Client C Drive, and My Documents.



3. Single click the **My Documents** icon to open the folder.

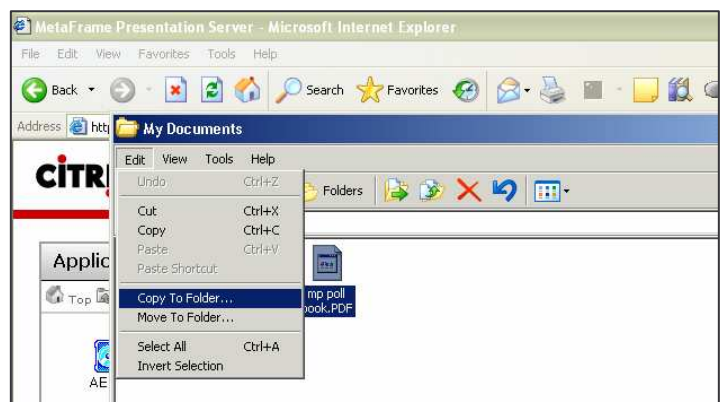


4. You will see Z:\My Documents. **Highlight** the poll book to retrieve by single clicking on the file.

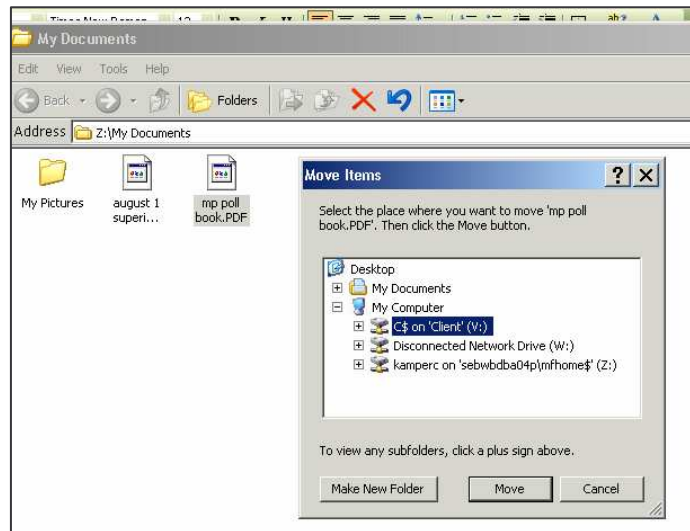
5. Click on **Edit** and select the **Copy to Folder** or **Move to Folder** command.



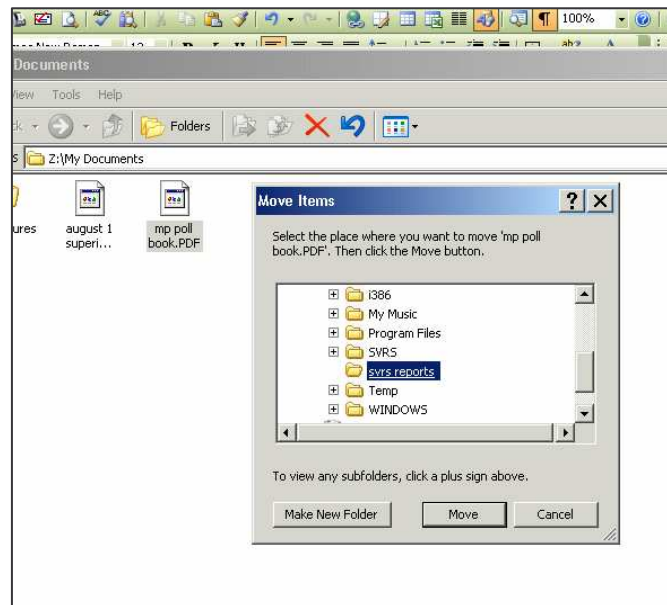
You can move or copy multiple files at the same time. Highlight specific multiple files by holding the Control key while highlighting the files to be moved or copied. You can also move sequential files by clicking on the first file, holding the Shift key, and clicking the last file to be moved or copied.



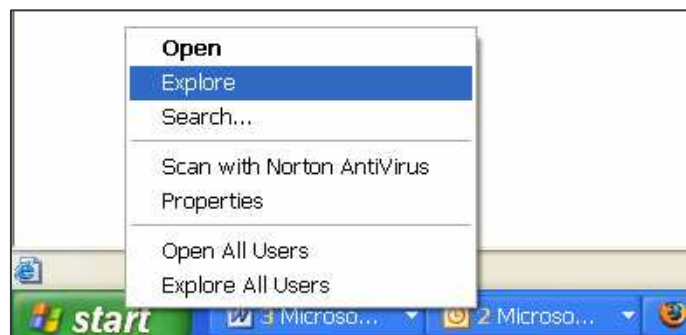
6. A dialogue box will open. Expand the C\$ on Client (V:).



7. Choose the location within the C drive to move or copy the files.
8. Click the **Move** or **Copy** button.



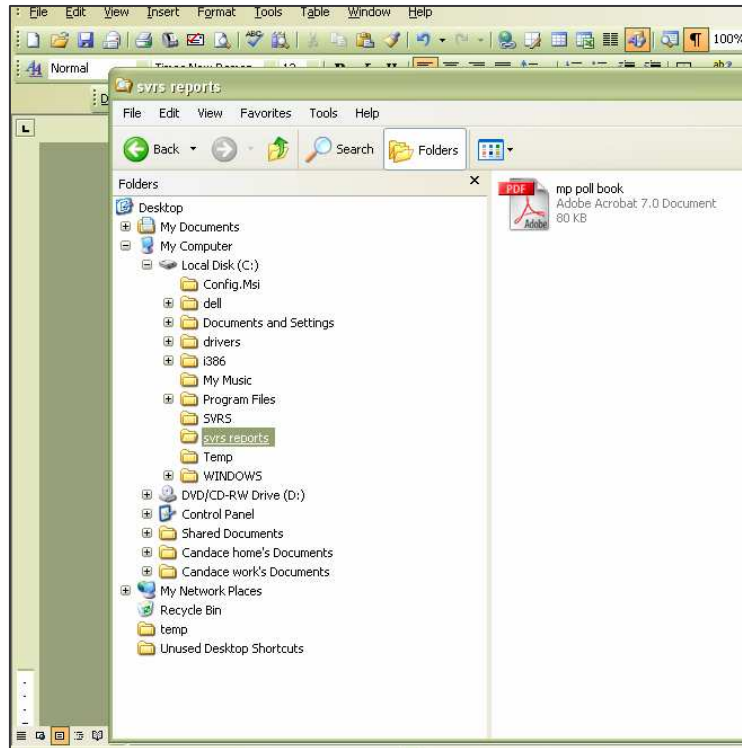
9. The file is moved or copied to the local hard drive.
10. To open and print the report, use the Windows Explorer to access the report.
 - a. Right click on the **Start** button.
 - b. Click on **Explore**.



11. Expand the Local disk (C:) Drive.
12. Locate the poll book pdf file.
13. Open and view the poll book file.
14. Print the .PDF poll book file.



If the .PDF file does not open, it may be necessary to download the Adobe Acrobat Reader software. For more information on downloading a free version of Adobe Reader, visit:
www.adobe.com/products/acrobat



Review Poll Book(s)



After the poll book is printed, it should be checked to see that it contains the correct sections and correct voters. Correct and reprint, if necessary.

1. Review the first section of the poll book. In addition to legibility, items to check include:
 - a. The Voter ID barcode printed correctly. Barcodes can be tested by using the barcode scanner and scan into a new Word.doc. Make sure that the number matches the number scanned in. DO NOT practice scanning in SVRS as this records voter participation history.
 - b. Registered voters are included in the correct poll book.

Will list Ward, Aldermanic District, or Municipality depending on Poll Book configuration

Date of Election

Election: 2006 FALL GENERAL ELECTION B - 05 Oct 2006



WI_PL_ELE_POLL-LN

District(s): 8

TOWN OF BLOOMING GROVE

TOWN HALL

Poll Book - 2006 GE B - TOWN HALL

Notes	Ward	District Combo	Ballot Combo	Name and Address	Voter #	Voter ID and Barcode
Names beginning with the letter [A]						
ID Required	3	13008-003-2	NP-1	AARON, John 3512 ALVAREZ AVE MADISON, WI 53714		1234560987 
				CONG: 2 USCH:3381 ASSM: 48		
	1	13008-001-1	NP-1	ABEYTA-MARTINEZ, Sally E 3324 THURBER AVE MADISON, WI 53714-1632		1234567890 
				CONG: 2 USCH:3288 ASSM: 48		

Watermark from setting ID Required to Yes

Ballot Style

Poll Workers write in number for voter participation.

2. Review the second section of the poll book. It is the Confidential Voter page. If the municipality has no confidential voters, the page will appear as below.

Election: 2006 FALL GENERAL ELECTION B - 05 Oct 2006

WI_PL_ELE_POLL-LN

District(s): 8

TOWN OF BLOOMING GROVE



TOWN HALL

*** Confidential Voters ***

 No voters found in the system for this municipality and district combination.

Poll Book - 2006 GE B - TOWN HALL

- Review the third section of the poll book. It is the Supplemental List. This section contains voters who were entered into SVRS between the close of regular registration and poll books were printed.

Supplemental Poll List						
no rows						
Notes	Ward	District Combo	Ballot Combo	Name and Address	Voter #	Voter ID and Barcode
Names beginning with the letter [M]						
	3	13008-003-2	NP-1	MEYERS, Janice 3569 BEEGS RD		8888981234
		CONG: 2 USCH:3381 ASSM: 48		MC FARLAND, WI 53558		
	3	13008-003-2	NP-1	MUNSCH, Charles 3583 CARNCROSS DR		1111111111
		CONG: 2 USCH:3381 ASSM: 48		MC FARLAND, WI 53558		

- Review the fourth section of the poll book. It lists Supplemental Poll List Confidential Voters. If the municipality has no voters who fit this criteria, the page will appear as below.

Supplemental Poll List		
Election: 2006 FALL GENERAL ELECTION B - 05 Oct 2006		
District(s): 8		
TOWN OF BLOOMING GROVE	* Confidential Voters *	WI_PL_ELE_POLL-LN
TOWN HALL		Poll Book - 2006 GE B - TOWN HALL
No voters found in the system for this municipality and district combination.		


- Review the last section of the poll book. It is the certification page. It includes the total number of voters within all sections of the poll book.

Election: 2006 GENERAL ELECTION - 07 Nov 2006		W_P_ELE_POLLBOOK
District(s): MN18		
TOWN OF MINERAL POINT		
TOWN HALL	Poll Book - 2006GENEL - TOWN HALL	

Certification of Executive Director

I certify that the attached list is a true and complete registration list of the municipality or the ward or the wards for which the list is prepared.

Kevin J Kennedy



State Elections Board Executive Director

Certification

We certify that the attached list contains all the names of persons voting at the election held on,
November 7th, 2006, and that it contains all the information about the electors
 required by law. We further certify that this list is true, correct and complete.

Total Number of Voters Printed on the Poll List: 287

Last Voter Number: _____

Page Number of Last Voter: _____

Number of Absentee Electors: _____

Chief inspector or poll workers
complete this section at end of
Election Day.

Chief inspector and all poll
workers who managed this
copy of the list will sign this
section on Election Day.

Election Inspector Signatures:

1. _____
Chief Inspector
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
Election Inspectors

The information on this form is required by ss 8.79(1)(4),(5), 8.82(1)(a), 2(d), 8.88(3)(a), Stats.
 BB-107 (SVRS 2005)

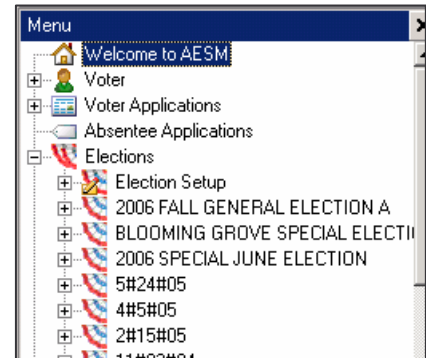
Printed 10/31/2006 3:35:35 PM
Page 41 of 42

Check Milestone #5 – Poll Book Printed

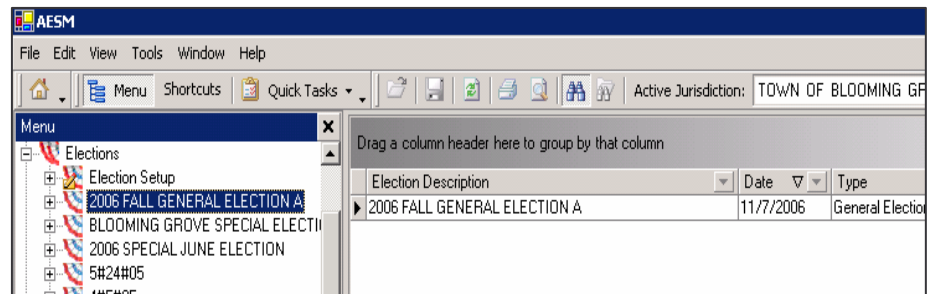


After successfully printing all poll books, the municipality may check off Milestone #5.

1. Expand (+) the **Election** node on the Main Menu Tree.



2. Click the **selected election** in the Menu Tree.
3. Double click on the **selected election** from the data grid.



4. Click the **Events** tab.

Election - Update - 2006 FALL GENERAL ELECTION A

Save and Close Save and New Close Quick Tasks Set Defaults Use Defaults

Election Events Districts Documents

General Election Setup

Description: 2006 FALL GENERAL ELECTION A Nickname: 2006 GE A

Election Date: 11/7/2006 Calendar Color: Color [Empty] State Nickname:

Election Details

Election Type: General Election Highest Gov. Level: Federal

Registration Close: 11/7/2006 Time Polls Open: 07:00:00 AM

Date for Last Absentee Issuance: 11/7/2006 Time Polls Close: 08:00:00 PM

Advanced Election Details

Effective Reg Date: 11/7/2006 Run-off for: [Edit Value is null]

Voter Age Eligible: 11/7/2006 Voter Min. Age: 18.0

Property Owner Election All Mail-Ballot Election Polling Place Plan: GENERAL ELECTION POLLING LOCATIONS

Election Status

Election Status: Active Election Mode: Advanced Owner: ISCONSIN - W

Date Closed: Status Updated On: Created On: 2/23/2006 Created By: State

☒ Publish Election Information Election ID: 70000018 Last Changed On: 4/19/2006 Last Changed By: State

5. Check **Milestone 5 Poll Books Printed.**
6. Click the **Save and Close** button to save the change.

Election - Update - 2006 SPRING PRIMARY

Save and Close Save and New Close Quick Tasks Set Defaults Use Defaults

Election Events Districts Documents

Milestones

Election Milestones are pivotal events during an Election Cycle. Mark off each Milestone as the event is completed.

Drag a column header here to group by that column

Completed	Election Milestone	Description	Completed...	Completed...
<input checked="" type="checkbox"/>	Election Setup	Basic Election Setup complete; Election is scheduled	1/12/2006	StateUser_18
<input checked="" type="checkbox"/>	Election Active	Election Cycle has begun	1/12/2006	StateUser_18
<input checked="" type="checkbox"/>	Ballot Setup Finalized	All Contests are setup; Ballot Style can be generated		
<input checked="" type="checkbox"/>	Ballot Styles Finalized	Specifies that ballot styles have been created		
<input checked="" type="checkbox"/>	Poll Books Printed	Poll book printing is completed for the election		
<input type="checkbox"/>	Election Results Finalized	All Election results entered and completed for the electi...		
<input type="checkbox"/>	Payments Complete	All Payments entered and completed for the election.		