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SVRS Election Cycle Checklist (Post Election Portion)

This section of the participant manual covers the tasks in this checklist (including entering Election Day Registrations, Recording Votes, etc.). See Appendix B for the complete checklist. Instructions for additional steps are contained in other election-related sections.

Milestones and Activities	Details
<input type="checkbox"/> 11. Process Late Registrants, Election Day Registrations and Update Proof of Residence	
<input type="checkbox"/> 12. Record Voter Participation from Poll Books using Barcode Scanners or manual entry of Voter IDs	
<input type="checkbox"/> 13. Record Contest Winners and Update Office Holders	
<input type="checkbox"/> 14. Check Milestone 6: Election Results Finalized If checked, all election results are entered for the election.	
<input type="checkbox"/> 15. 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"/> 16. Mark Polling Places Used (Optional)	
<input type="checkbox"/> 17. Check Milestone 8: Election Day Closed If checked, the election day has passed, but all voting activity is not yet recorded.	
<input type="checkbox"/> 18. Check Milestone 9: Election Finalized If checked, all election tasks are completed and the election is closed.	<ul style="list-style-type: none"> • Corresponds with the election status of closed.

Process Late Registrations, Election Day Registrations and Update Proof of Residence



There are a number of tasks to complete in SVRS following an election.



The deadline for entering Election Day Registration (EDR) applications and recording voter history is 30 days after an election. For more on EDR, see the [Voter](#) section of this manual.

Election Day Registration

- ☐ Election Day Registration is when a voter registers to vote on election day at the polling place and fills out an EB-131 Voter Registration Application. Be sure poll workers record, on the paper copy of the application (EB-131), the proof of residence information (type and number) and enter that information into SVRS. Processing an EB-131 voter application with the status reason of Election Day Registration will automatically record voter participation for that person. See the [Voter Application](#) section for instructions.

Election Day Registration – No Valid Address Range

- ☐ If, while processing Election Day Registrations, the address cannot be validated because the Address Range has not been set up, extended, or the voter voted in the wrong jurisdiction: 1) Process voter application as “Pending – Address Not Verified;” 2) Create or extend the address range; 3) Reopen voter application to validate the address and process as an approved Election Day Registration to record the voter history. If the voter voted in the wrong jurisdiction, contact the Help Desk. See the [Voter Application](#) section for instructions.

Recording Incomplete Election Day Registrations

- ☐ A voter who cast a ballot and has an incomplete Election Day Registration must first be processed as an approved application in SVRS to record voter history. Once the voter registration application is processed and the vote recorded, the voter status should be changed to “Inactive”. Clerks should contact the voter to obtain the missing information, and only when the needed information is received can the status of the voter record be changed back to “Active.” See the [Voter Application](#) section for instructions.

Update a Voter Record – Edit Proof of Residence

- ☐ First time Wisconsin voters who registered by mail, and did not attach a proof of residence, should have their Voter record marked “ID Required” when their application is entered into SVRS. This will mark the poll book with an “ID Required” to the left of the voters’ names and will alert the poll worker to require proof of residence before giving the voter a ballot on Election Day. Poll workers should record the type and number of the proof on the poll book. After an election, review the poll book. Enter Proof of Residence information on each voter’s record. Go to the “Other” tab and change the value to No. If this is not done, subsequent poll books will again have “ID Required” beside voters’ names, where applicable. See the [Voter](#) section for instructions.

Voter Application – Late Registrations

- ☐ Late registrants who were manually added to the Supplemental Poll List need to be entered into SVRS. Write the Voter’s registration number on the voter application form and on the Supplemental Poll list. Keep all of the late registrants’ forms together. After entering and processing the late registrants in to SVRS, use the information from the Supplemental Poll List to Record Votes. See the [Record Votes](#) pages in this section.

Record Votes

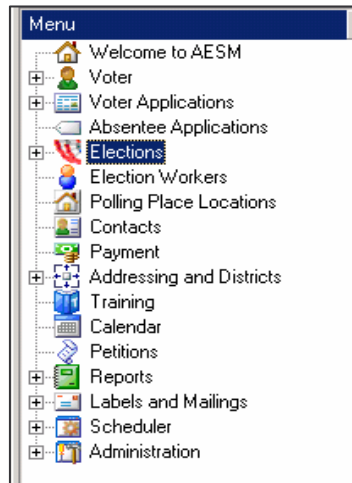


Recording voter participation in an election is done through the Record Votes node. Before recording votes for an election, you should first have checked Milestone #5 – Poll Book Printed. Have the poll books from the election available for this step.

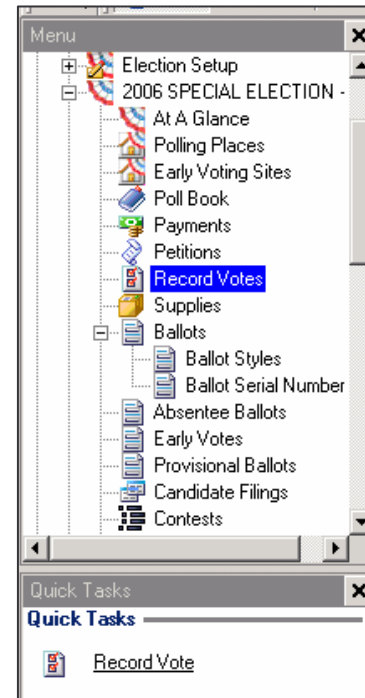


The deadline for recording votes is 30 days after an election. This is also the deadline for entering any Election Day Registration (EDR) forms. For more on EDR, see the [Voter](#) section of this manual.

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



2. Expand (+) the selected election
3. Click on the **Record Votes** node.



4. Click the **Record Vote** Quick Task.

5. Click the **Record Votes** tab to begin.

A screenshot of the 'Record Votes' tab in the software. The interface includes a 'Search Votes' tab and a 'Record Votes' tab. The 'Record Votes' tab is active. It features a 'Count: 0' label, a 'Voter Reg Num:' field, a 'Party:' dropdown, a 'Method:' dropdown, a 'Ballot Type Cast:' dropdown, and a 'Polling Place Location:' dropdown. There are also 'Add Party' and 'Auto-Record' checkboxes. Below these fields is an 'Election:' dropdown set to '2008 PRESIDENTIAL PREFERENCE AND SPRI...'. To the right of the election dropdown are 'Clear' and 'Record' buttons. At the bottom, there are fields for 'Name / Address', 'Ward', and 'District Combo', along with a 'Delete Vote' button.

6. Select the fields as follows:
 - a. **Add Party:** Not used
 - b. Check the **Auto-Record** box: This automatically records the vote without clicking on the **Record** button.
 - c. Select the vote **Method:** Absentee votes must be recorded using the "**Absentee**" method and polling place votes must be recorded using the "**At Polls**" method
 - d. Select the **Ballot Type Cast** from the list.
 - e. **Polling Place Location:** Enter the polling place location (printed on the poll book) where the votes were cast.
 - f. Enter the **Voter Registration Num:** The voter number can be entered manually or scanned in from the poll book with a bar code reader.

The screenshot shows the 'Record Votes' window with the 'Method' dropdown menu open. The options are: Absentee, At Polls, Provisional, and Walk-Out. The 'Auto-Record' checkbox is checked. The 'Voter Reg Num' field is empty. The 'Ballot Type Cast' dropdown is also open, showing options: Absentee, Military Absentee, Presidential, Provisional, Regular, and Rejected Absentee.

The screenshot shows the 'Record Votes' window with the 'Ballot Type Cast' dropdown menu open. The options are: Absentee, Military Absentee, Presidential, Provisional, Regular, and Rejected Absentee. The 'Auto-Record' checkbox is checked. The 'Voter Reg Num' field is empty. The 'Polling Place Location' field is empty.



When you begin recording votes using a bar code scanner, be sure to click inside the data entry box immediately below Voter Reg Num. With the cursor in this box, the voter registration number being scanned is entered in this box. If the cursor is not in this field, the scanner is unable to enter the scanned number and no vote will be recorded.

7. Each recorded vote is displayed in the data grid.
8. If the vote has been incorrectly recorded, highlight the record in the data grid and click the **Delete Vote** button.



To spot check the votes recorded:

1. Go to the **Voter** node
2. Search for a voter using the voter's name or registration number
3. Open the voter record by double clicking on the data grid
4. Click the **Voter Activity** tab to view the voter's voting history.

The screenshot shows the AESM application interface. The 'Voter' node is selected in the left-hand menu. The 'Voter Activity' tab is active, showing a data grid with one record. The record details are: Jurisdiction: 13008, Name: ADAMS, NEEMA Q, Date Of Birth: 10/4/1979, Place Of Bir..., Party, and Gen... The 'Records Returned: 1' is displayed above the grid.

Voter - Update - ADAMS, NEEMA

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

General Activity Other Districts Voting Activity Registration History Documents

Drag a column header here to group by that column

Elec Date	Elec Type	Elec Desc	Method	Reason	Location	Recorded	Election ID
10/16/2006	SPEC	2006 SPECIAL...	At Polls		TOWN HALL	5/16/2006	70000054

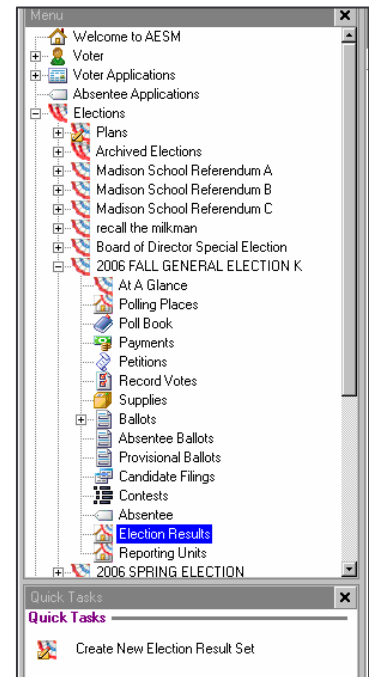
Entering Election Results



After each election, you will want to capture your election results in SVRS. Doing this will allow easier access to the information by members of the media and of the public, and will eventually become the sole way to report your elections results to the SEB. There are three steps to entering results: 1) Creating an Election Results Set; 2) Entering results by reporting unit; and 3) Printing your canvass report from SVRS.

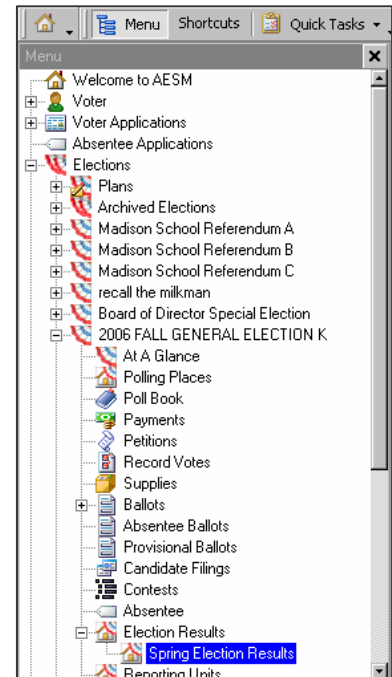
Creating an Election Results Set

1. Expand (+) the **Elections** node on the Main Menu Tree.
2. Expand (+) the Election for which you wish to record results.
3. Click on the **Election Results** node.
4. Click the **Create New Election Result Set** Quick Task to open the **ElectionResultSetForm** Screen.
5. Enter a **Description** for your results set.
6. Select **Reporting Unit** from the **Results Reported by** drop down menu
7. Click **Save and Close**.

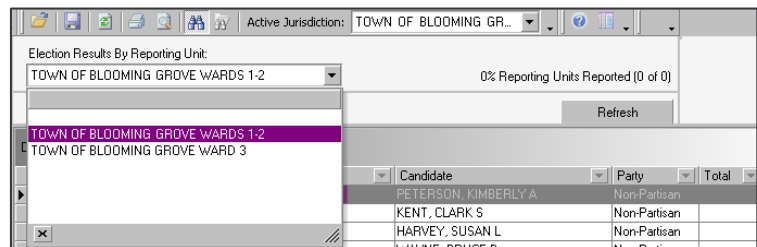


Entering Results by Reporting Unit

1. Expand (+) the **Elections** node on the Main Menu Tree.
2. Expand (+) the Election for which you wish to record results.
3. Expand (+) the **Election Results** node.
4. Click on the Results set you wish to update.



5. Choose the Reporting Unit whose results you wish to record from the **Election Results by Reporting Unit** drop down menu.



6. Enter the number of votes received by each candidate directly into the **Total** field.
7. Repeat steps 5-6 for each of your reporting units.

Active Jurisdiction: TOWN OF BLOOMING GROVE

Election Results By Reporting Unit: TOWN OF BLOOMING GROVE WARDS 1-2

0% Reporting Units Reported (0 of 0)

Refresh

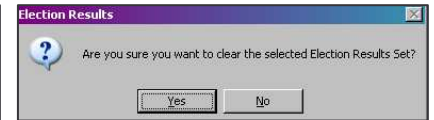
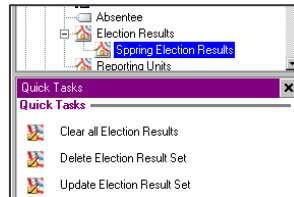
Drag a column header here to group by that column

Jurisdiction	Contest	Candidate	Party	Total
State	US Senator	PETERSON, KIMBERLY A	Non-Partisan	100
State	US Senator	KENT, CLARK S	Non-Partisan	100
State	Governor	HARVEY, SUSAN L	Non-Partisan	100
State	Governor	WAYNE, BRUCE B	Non-Partisan	100
County	Dane County Clerk	ROBERT OHLSEN	Non-Partisan	100
County	Dane County Clerk	ELISA L WEST	Non-Partisan	100
County	Dane County Clerk	PRINCE, DIANE W	Non-Partisan	100
	DAYLIGHT SAVINGS TIM...	FOR		100
	DAYLIGHT SAVINGS TIM...	AGAINST		100
County	SCHOOL BOARD MEMBE...	ANDERSON, ANITA G	Non-Partisan	
County	SCHOOL BOARD MEMBE...	ANDERSON, BROOKE M	Non-Partisan	
County	SCHOOL BOARD MEMBE...	BROWN, BRAD I	Non-Partisan	
County	SCHOOL BOARD MEMBE...	BROWN, CELETUS A	Non-Partisan	
County	SCHOOL BOARD MEMBE...	DAVIS, LARRY G	Non-Partisan	
County	SCHOOL BOARD MEMBE...	DUPOR, DEBRA A	Non-Partisan	

Clear Your Recorded Elections Result Set

(records all Candidates as receiving 0 votes)

1. Click on the Election Results set you wish to clear.
2. Click the **Clear all Election Results** Quick Task.
3. When asked is you are sure you want to clear the selected Election Results Set, click **Yes**.
4. Your results will then look like this:



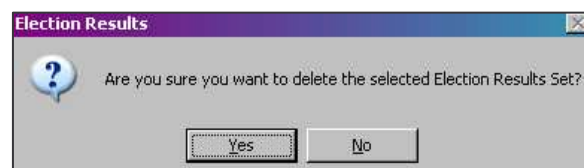
Jurisdic...	Contest	Candidate	Party	Total
State	US Senator	PETERSON, KIMBERLY A	Non-Partisan	0
State	US Senator	KENT, CLARK S	Non-Partisan	0
State	Governor	HARVEY, SUSAN L	Non-Partisan	0
State	Governor	WAYNE, BRUCE B	Non-Partisan	0
County	Dane County Clerk	ROBERT OHLSEN	Non-Partisan	0
County	Dane County Clerk	ELISA L. WEST	Non-Partisan	0
County	Dane County Clerk	PRINCE, DIANE W	Non-Partisan	0
	DAYLIGHT SAVINGS TIM...	FOR		0
	DAYLIGHT SAVINGS TIM...	AGAINST		0
County	SCHOOL BOARD MEMBE...	ANDERSON, ANITA G	Non-Partisan	0
County	SCHOOL BOARD MEMBE...	ANDERSON, BROOKE M	Non-Partisan	0
County	SCHOOL BOARD MEMBE...	BROWN, BRAD I	Non-Partisan	0
County	SCHOOL BOARD MEMBE...	BROWN, CELETUS A	Non-Partisan	0
County	SCHOOL BO SCHOOL BOARD MEMBER MC FARLAND		Non-Partisan	0
County	SCHOOL BOARD MEMBE...	DUPOR, DEBRA A	Non-Partisan	0
County	SCHOOL BOARD MEMBE...	EATON, CONNIE L	Non-Partisan	0
County	SCHOOL BOARD MEMBE...	EVANS, KERRY M	Non-Partisan	0

Delete an Elections Result Set

1. Click on the Election Results set you wish to delete.
2. Click on the **Update Election result Set** Quick Task to open the **ElectionResultSetForm**.
3. Deselect the check box that reads **Active Election Results Set**.
4. Click **Save and Close**.

A screenshot of the 'ElectionResultSetForm' window. It has a title bar 'ElectionResults ElectionResultSetForm'. At the top are 'Save and Close' and 'Cancel' buttons. The 'Description' field contains 'Spring Election Results'. The 'Results Reported by' dropdown is set to 'Reporting Unit'. The 'Active Election Results Set' checkbox is unchecked. The 'Polls Reported' field shows '0' of '(total):'. There is a 'Comments' section with a text area.

5. Click on the **Delete Election Result Set** Quick Task.
6. When asked if you want to delete the selected Election Results Set, click **Yes**.



Print your Canvass Report from SVRS

1. Click on the **Reports** node.
2. Click on **Print Reports**.
3. Choose a Category of **Elections**.
4. Choose a report name of **WI Canvass Reporting Unit Detail – Recount General**.
5. Click **Next**.

Menu

- Welcome to AESM
- Voter
- Voter Applications
- Absentee Applications
- Elections
- Election Workers
- Polling Place Locations
- Contacts
- Payment
- Addressing and Districts
- Calendar
- Petitions
- Reports**
- Labels and Mailings
- Scheduler
- Administration

Quick Tasks

- Print Reports
- Create Report

Category: Elections

Reports:

- WI Canvass County Totals Recount - General
- WI Canvass County Totals Recount - Primary
- WI Canvass Reporting Unit Detail - Recount
- WI Canvass Reporting Unit Detail - Recount General**
- WI Canvass Status Election

WI Canvass Reporting Unit Detail - Recount General

Canvass Reporting Unit Detail - Recount General
Spring Primary - Presidential Preference
November 06 - 2006

City of Adams - Ward 1-2	City of Adams - Ward 2-4	City of Adams - Ward 5-6	Total
40	0	0	40
20	0	0	20
0	0	0	0
40	20	0	60
40	20	0	60

Delete Modify Layout Next

6. Click the **Custom** button next to the Filter Drop Down to open the custom filter form.

7. Create the following filter:

- i. And/Or = And
- ii. Field Name = Election Date
- iii. Condition = Equals
- iv. Value = Date of election in MM/DD/YYYY format. Months or days below 10 do not require a leading zero (e.g.: 04/04/1900 should be entered as 4/4/1900)

FilterForm

Use Filter Save Save As Delete Clear Close

Filter Name:

WI_R_ELE_CanvassGen_RECOUNT

And/Or	Field Name	Condition	Value
And	Election Date	Equals	11/7/2006

8. Click **Use Filter**
9. Check your **printer settings**, if necessary.
10. Click in the **Print Now** radio button and click **Print**.

Print Report

Selected Report: WI Canvass Reporting Unit Detail - Public Report

Report Options

Filter: (Custom Filter) Custom

Sort By: (Select Sort) Custom

More Report Options

☒ Show Protected Information

Printer Setup

Print Options

☐ Preview ☒ Print Now ☐ Schedule

(Select Sch...) Custom

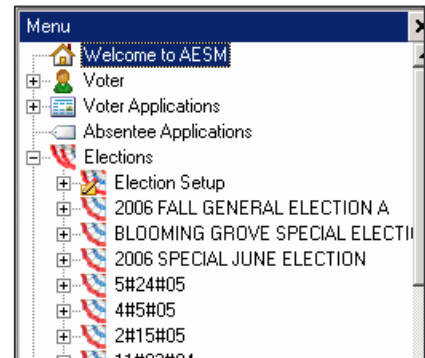
Back Print

Close Out the Election

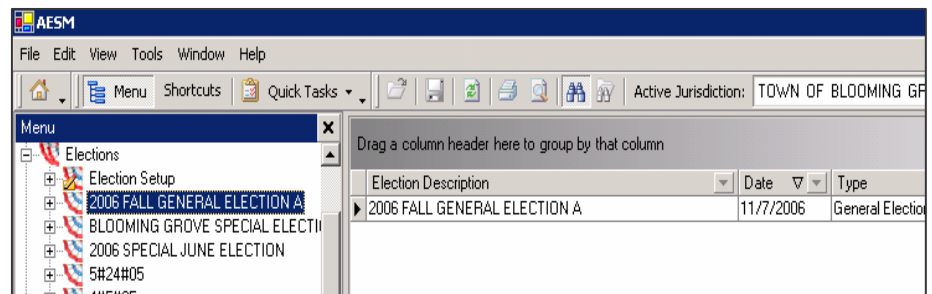


Once all information is entered in to SVRS for an election, the election needs to be closed out. This involves checking the remaining milestones on the Events tab of the election. You are able to uncheck milestones if changes are necessary at a later date, but the election can only be viewed for historical purposes so long as Milestone 9 remains checked.

1. Expand (+) the **Election** node on the Main Menu Tree.
2. Click the name of the election, that is 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 the remaining milestones through Milestone 9 Election Finalized.
6. Click the **Save and Close** button to save the changes.

The screenshot shows the 'Milestones' window in the SMS system. The window has a menu bar with 'Save and Close', 'Save and New', 'Close', 'Quick Tasks', 'Set Defaults', and 'Use Defaults'. Below the menu bar are tabs for 'Election', 'Events', 'Districts', and 'Documents'. The 'Milestones' section contains a table with the following data:

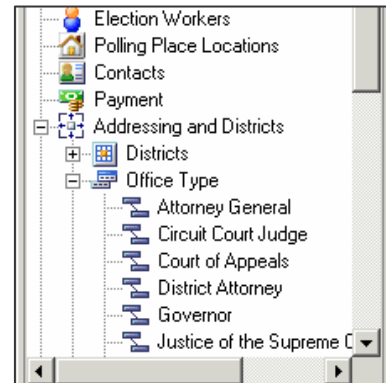
Completed	Election Milestone	Description	Completed...	Completed...
<input checked="" type="checkbox"/>	Election Setup	Basic Election Setup complete; Election is scheduled	10/4/2006	clerk10
<input checked="" type="checkbox"/>	Election Active	Election Cycle has begun	10/4/2006	clerk10
<input checked="" type="checkbox"/>	Ballot Setup Finalized	All Contests are setup; Ballot Style can be generated	10/4/2006	clerk10
<input checked="" type="checkbox"/>	Ballot Styles Finalized	Specifies that ballot styles have been created	10/4/2006	clerk10
<input checked="" type="checkbox"/>	Poll Books Printed	Poll book printing is completed for the election	10/11/2006	clerk10
<input checked="" type="checkbox"/>	Election Results Finalized	All Election results entered and completed for the electi...	10/11/2006	clerk10
<input checked="" type="checkbox"/>	Payments Complete	All Payments entered and completed for the election.	10/11/2006	clerk10
<input checked="" type="checkbox"/>	Election Day Closed	Election Day has passed but all history not yet recorded.	10/11/2006	clerk10
<input checked="" type="checkbox"/>	Election Finalized	All election tasks are completed; election is closed		

Add or Update Office Holders



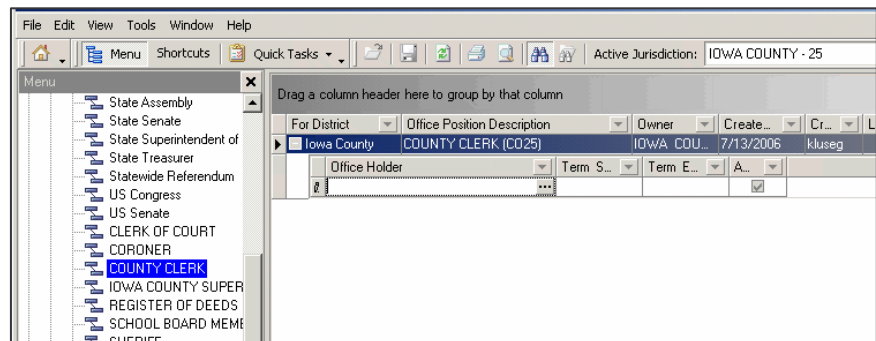
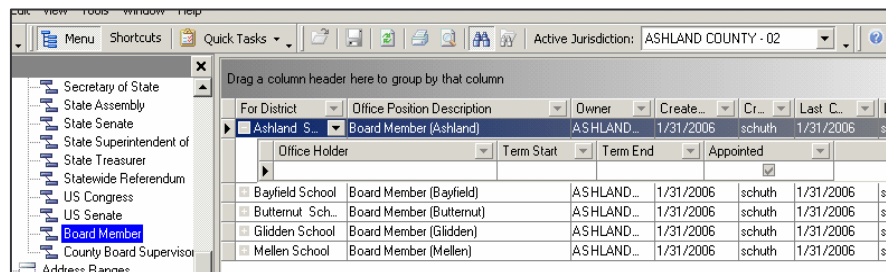
Current Office Holders need to be added to the SVRS before voters will be able to view the information on the Voter Public Access (VPA) website. Municipalities enter the Office Holders for local offices. Counties add Office Holders for County offices (including Supervisors and School Boards). The State enters Office Holders for State and Federal offices.

1. To add or update Office Holders, expand (+) the **Addressing and Districts** node on the Main menu tree.
2. Expand [+] the **Office Type** node.
3. Click on the **Office Type** to update. The offices will appear on the data grid.



Some office types have one line on the data grid, such as a Mayor. Other office types have multiple lines, such as School Board Member.

4. On the data grid, expand [+] the **Office**.
 - a. Click within the white space below the Office Holder. Click on the three dots (ellipse button) to reach the Contact search panel. Enter the office holder's name in the search panel. Double click to select the person from the data grid.



Contact Search

Last Name: First Name: Middle Name: Suffix:

Date of Birth: Soc Sec Num: Party:

House No: Street Name:

City: State: ZIP Code:

Search Options:
☐ Non-Person
☐ Include Retired Contact Records

☐ Count Only

Owner	Name	Address	Residential City/State/ZIP Code
IOWA COUNTY...	KLUSENDORF, GREG	N IOWA ST	DODGEVILLE, WI 53533

- b. Enter the term start date and the term end date directly in the grid.

- c. If there is more than one office holder, such as a School Board office, another entry line will appear in the data grid when you select the just entered office holder's name.

For District	Office Position Description	Owner	Create...	Cr...	Last C...
Iowa County	COUNTY CLERK (C025)	IOWA COU...	7/13/2006	kluseg	

Office Holder	Term S...	Term E...	A...
GREG KLUSENDORF			<input checked="" type="checkbox"/>



Click in the **Appointed** box only if the office holder was appointed, not elected. This function allows entry of appointed officials, in addition to those who are filing a position mid-term.

5. Click on the **Menu** tree when complete.



All **School Board positions** will appear in the Office Position Description column. If the previous data grid was not edited to show the school district name, the DPI-assigned school district numbers will appear in the parentheses after each board member position.