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Managing HAVA Checks



When you perform a HAVA Check on a voter application, the results are not real-time. Instead, SVRS communicates with the WI Department of Transportation (DOT) and Social Security Administration (SSA) on a nightly basis. When clerks arrive each morning, SVRS will have run the checks. The system will also produce a report for clerks to use to audit the results of the check.

A HAVA check compares the Name, Date of Birth, and Driver's License or Social Security Number you have entered into SVRS against the information contained in databases maintained by DOT and SSA. If these pieces of information are not exactly the same in both databases, the voter will fail the check.

Your first job as clerk is to check for data entry errors that caused a person to fail the check. GAB has created a report that will allow you to do this quickly by comparing the information on the report against the information on the voter's GAB-131. If you discover a typo, you will rerun the HAVA check for that voter.

If a voter fails a HAVA check and there was no typo, you will send the voter a notice informing them of the problem. Providers will be responsible for sending out these notices, but the contact information on the notices will be for the municipal clerk, so Reliers must handle voter questions. Reliers must also forward any responses to their Providers to make appropriate changes or notations in SVRS.



You must run a HAVA Check on each new voter application entered into SVRS. For more information on running the initial HAVA Check, see the [Voter Application](#) chapter

Generate the WI HAVA Check Report.

1. Click the **Reports** node.
2. Click the **Print Reports** quick task.
3. Leave the **Category** set to **Voter**, which is the default.
4. In the **Reports** list, click **WI HAVA Check Report**.
5. Click **Next**.
6. Create a custom **Filter**.

- a. Click the **Custom** button to the right of the **Filter** box.
- b. Create a filter as shown in the screenshot below. Enter the desired **HAVACheckDate** in mm/dd/yyyy format on the first line.
- c. Click **Use Filter**.

Filter
(Select Filter) Custom

Category: Voter

Reports

- Voters Assigned to an Alterna...
- Voters with Multiple Ballots
- Voters with no District Combi...
- WI HAVA Check Report**
- WI Voter Match Rerun...

WI HAVA Check Report

Delete Modify Layout

Next

FilterForm

Use Filter Save Save As Delete Clear Close

Filter Name: [dropdown]

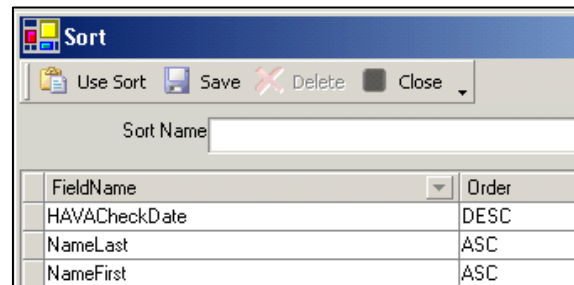
And/Or	Field Name	Condition	Value
And	HAVACheckDate	IsGreaterThan	mm/dd/yyyy
And	HAVACheckResult	DoesNotEqual	COM*
And	HAVACheckResult	DoesNotEqual	PEN*



This filter will return all HAVA Checks run after the specified date that are not still pending, and were not complete matches. These are the records that require further attention.

7. (Optional) **Sort** your report:

- Click the **Custom** button next to the **Sort** drop down list.
- Sorting by **HAVA Check Date; DESC** (descending) will put your records in order from most recent to oldest. You may also sort by **NameLast** (last name) and **NameFirst** (first name).
- Click **Use Sort**.



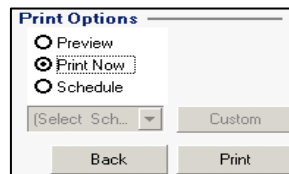
FieldName	Order
HAVACheckDate	DESC
NameLast	ASC
NameFirst	ASC

- Click the **Printer Setup** button, and choose whether to print or export your report. For more information on printing and exporting, see the [Reports](#) chapter of this manual.



- Select the **Print Now** radio button.

- Click **Print**.



- Retrieve the [WI HAVA Check Report](#).

- If you exported this report and need information on how to retrieve it from your **My Documents** folder, see the [Reports](#) chapter. A sample of the report is displayed below.

- Check for data entry errors.

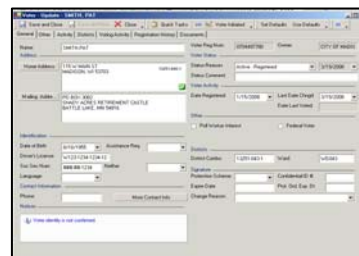
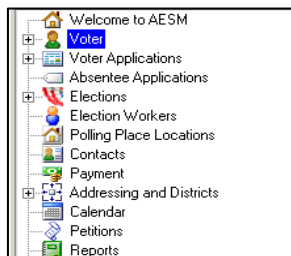
- Open the report.
- Compare the Name, Date of Birth, DL# and/or SSN on the report against the GAB-131 for each listed voter. If you find any data entry errors, follow the directions below to fix them.

HAVA Check Report									
First Name	Middle Name	Last Name	Suffix	DOB	DL#	SSN	HAVA Ck Date	HAVA Ck Result	Ward
City of Madison									
PAT		SMITH		08/10/1955	W123-1234-1234-12	1234	03/19/2008	PEND(All Fields Match)	City of Madison - Ward 42

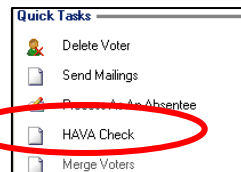
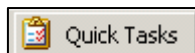
Wisconsin Driver License/ID Number		W123-1234-1234-12				I have neither a WI Driver License/ ID nor a Social Security Number.		
Social Security Number - Last Four Digits (only if no license/ID number)		X X X - X X - 1234						
Print your name exactly as it appears on the document, the number of which you provided in Box 2. (Driver License/ID Card or Social Security Card).								
Last Name		SMITH			First Name		PAT	
Middle Name					Suffix (e.g. Jr, II, etc.)		Phone #	
Date of Birth (MM/DD/YYYY)		8/10/1955			Email Address		PAT.SMITH@FAKE.COM	

Fix a Data Entry Error and Rerun the HAVA Check from the Voter Node.

- Click the **Voter** node.
- Search for the voter and open his or her voter record.
- Correct any data entry errors.
- Make sure you **Tab** out of the field you changed. This ensures that any information you changed will be included in the HAVA Check.



- On the toolbar, click **Quick Tasks**.
- Click the **HAVA Check** Quick Task.
- In the confirmation box, click **Yes** to perform a HAVA Check with the updated information.



- On the **Other** tab, enter **HAVA Check – DE** in the **Comment** field. This will allow SVRS to track the number of voters who failed their HAVA Check because of a data entry error.

- You will receive a prompt to **Please remember this is a publicly available document**. Click **OK**.

- Click **Save and Close**

- Repeat **Steps 2-10** for each voter whose record contains a data entry error. .

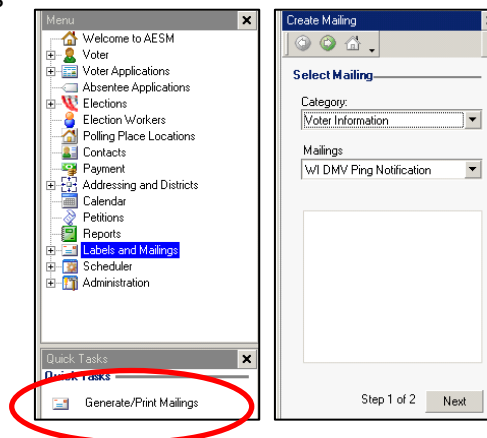
Send the WI DMV Ping Notification Letter.

If there are no data entry errors or you have dealt with all errors for the voters listed on the WI HAVA Check Report:

1. Click the **Labels and Mailings** node.
2. Click the **Generate/Print Mailings** Quick Task.
3. In the **Category** box, select **Voter Information**.
4. In the **Mailings** list, select **WI DMV Ping Notification**.
5. Click **Next**.

6. Filter your mailing:

(Select Filter) Custom



- a. Click the **Custom** button next to the **Filter** drop down.

- b. Create a filter that matches the screenshot.
Enter the **HAVA Check Date** in mm/dd/yyyy format on the first line.

FilterForm

Use Filter Save Save As Delete Clear Close

Filter Name: []

WIMailingsVoterViewNoHist

And/Or	Field Name	Condition	Value
And	HAVA Check Date	IsGreaterThan	mm/dd/yyyy
And	HAVA Check Result	DoesNotEqual	COM*
And	HAVA Check Result	DoesNotEqual	PEN*



This filter will return WI DMV Ping Notification letters for all HAVA Checks run after the specified date that are not still pending, and were not complete matches. These should be the same records that appeared on your WI HAVA Check Report.

- c. Click **Use Filter**.

7. **Sort** your mailing:

- a. Click the **Custom** button next to the **Sort By** drop down.

(Select Sort) Custom

- b. Create a sort that matches the screenshot:

FieldName	Order
NameLast	ASC
NameFirst	ASC

- c. Click **Use Sort**.

Use Sort Save Delete Close

8. Adjust **Printer Settings**, as needed.

9. Click the **Print Now** option button.

10. Click **Print Now**.

Printer Setup

Print Options

☐ Preview
☒ Print Now
☐ Schedule

(Select Sch..) Custom

Back Print

11. Send the WI DMV Ping Notification letters to the voters who have failed the HAVA Check. A sample of the letter is on the next page.

Respond to WI DMV Ping Notification letter recipients.

- a. When a voter contacts you, verify their name, date of birth, and driver's license or social security information.



Voters should be reassured that no matter what the results of their HAVA Check, it will not affect their right to vote. Once you have sent the WI DMV Ping Notification letter to a voter, you have met your responsibility to try and verify their information. You do not have to follow up with the voter or do anything further with the voter's record in SVRS, unless the voter contacts you.

Sample Letter:

City Of Madison
MARIBETH WITZEL-BEHL / CITY CLERK
210 MARTIN LUTHER KING JR BLVD
MADISON, WI 53703
(608) 268-8574
mwitzel-behl@cityofmadison.com
September 22, 2008

0000518914
EDWARD T EDNEY
132 E WILSON ST 202
MADISON, WI 53703

Dear Edward T Edney,

This letter concerns the status of your voter registration in the State of Wisconsin. Please read it all.

Some of the information provided on your voter registration application does not match the records at the Department of Transportation or Social Security Administration. Federal and State election laws require the State to compare this information.

Please contact the clerk's office immediately at the telephone number listed at the top of this letter to verify and correct your personal voter registration information.

Personal information such as your date of birth, driver license number, and the last four digits of your social security number is kept confidential and protected under state law. By providing correct information, you protect yourself from the possibility of a mismatch with other voter information within the Statewide Voter Registration System. Your cooperation assures the accuracy of the registration process for all voters in Wisconsin.

Please respond today.

Thank you for your interest in voting and elections in Wisconsin.

Sincerely,

Maribeth Witzel-Behl
City Clerk
City Of Madison - 13251

- b. If the voter gives you corrected information:
 1. Follow the steps to re-run the HAVA Check from the **Voter** node.
 2. Enter the comment **HAVA Check – LR** (letter response) in the **Comments** field on the **Other** tab. This will allow SVRS to track the number of voters who responded and corrected their information.
 3. **Save and Close** the voter record.

Comments	
Last Chang...	Comment
6/16/2009 4:54:2...	HAVA CHECK -- LR

- c. If the voter verifies the information you already have in SVRS:
 1. Follow the steps to re-run the HAVA Check from the **Voter** node.
 2. Enter the comment **HAVA Check – VV** (voter verified) in the **Comments** field on the **Other** tab. This will allow SVRS to track the number of voters who failed their HAVA Check but verified that their information was correct.
 3. **Save and Close** the voter record.

Comments	
Last Chang...	Comment
6/16/2009 4:54:2...	HAVA CHECK -- VV

The Voter Match Node



The Voter Match Node is the place in SVRS where clerks go to perform three different tasks, each required by HAVA. They are: 1) Felon Matches; 2) Death Matches; and 3) Duplicate Voter Matches. SVRS users should check for matches at least once a month, and more often in the weeks before elections.



It is the municipal clerk's duty to decide whether to confirm or deny an SVRS suggested match to a felon or death record, or as a duplicate. Unless the Provider and Relier agree otherwise, this means that Providers will have to generate and send lists of potential matches to their Reliers on a regular basis. Reliers must examine these lists and note next to each potential match whether the Provider should mark the record as a Confirmed Match or Not a Match. The Provider will then make the appropriate updates in SVRS.

Felon Matching:

HAVA requires local election officials to regularly check the list of voters registered in their municipality against a list of felons provided by the Department of Corrections (DOC). Felons on post-correctional supervision are not entitled to vote in Wisconsin, so their voter records must be updated to reflect this.

Each person whose record is changed for this reason must receive a letter. The Provider will generate the WI Felon Notification Ineligible letter, containing the Relier's contact information. The Relier will respond to inquiries from ineligible voters.

Death Matching:

This HAVA requirement makes it the clerk's duty to check the list of voters registered in their municipality against death records maintained by the Department of Health Services (DHS). Voters who have passed away must have their records cancelled, though unlike felon matching, there is no requirement to send a mailing when changing a record based on a match to a death record.

Duplicate Voter Matching:

HAVA also requires that election officials make efforts to ensure that each voter has only one record in SVRS. This is partially accomplished through the Ad-Hoc matching process performed while entering each new voter application in SVRS. Periodically, however, clerks should perform a Duplicate Voter Match search to check that they have not missed a likely match when entering a new application, and to deal with existing duplicate voter records.

The WI Voter Match Report



It is often helpful to have a paper copy of your potential voter matches. Providers may generate reports for Reliers to use in deciding whether to confirm or deny felon, death, or duplicate matches. Reliers will examine the report, confirming or denying each potential match, and returning the report to the Provider, who will manage the results accordingly. Self-Providers may use this report to pull hard copies of the voter registration forms after the voter has been inactivated or cancelled. Self-Providers may also use this report to merge duplicate records. Once duplicate records are merged, they disappear from the Voter Match node, and no further action is necessary.

(Optional. Self-Providers may choose to skip this step.)

1. Click the **Reports** node.
2. Click the **Print Reports** Quick Task.
3. Leave the **Category** set to **Voter**, which is the default.
4. In the **Reports** list, click **WI Voter Match Report**.
5. Click **Next**.

6. **Filter** your report:

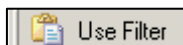
- a. Click the **Custom** button next to the filter drop down.

- b. Create a **Filter** that matches this screenshot.

And/Or	Field Name	Condition	Value
And	MatchStatusCode	Equals	UNC*

- c. The filter displayed will return all unconfirmed matches, of any type. If you wish, you can also add a line to filter by **Match Type**. Use **MatchTypeCode Equals**; and **FEL*** to filter for only felon matches, **DEA*** to filter for only death matches, and **DUP*** to filter for only duplicate matches.

- d. Click **Use Filter**.



7. Sort your report:

- a. Click the **Custom** button next to the **Sort By** drop down.

- b. Copy the **Sort** displayed. Death, Felon, and Duplicate matches will be grouped together, and voters within each group will be arranged alphabetically by name.

FieldName	Order
MatchType	ASC
VoterLastName	ASC
VoterFirstName	ASC

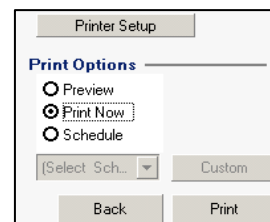
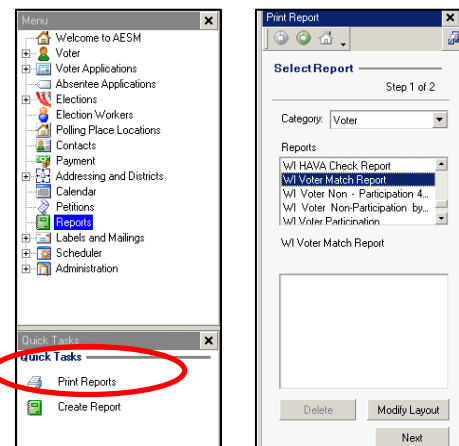
- c. Click **Use Sort**.



8. Click the **Printer Setup** button to adjust **Printer Settings**, as needed.

9. Click the **Print Now** option button.

10. Click **Print**.



Providers – if you generate this report at the county level, and export it to an excel spreadsheet, each jurisdiction in the county will appear on a separate tab of the spreadsheet.

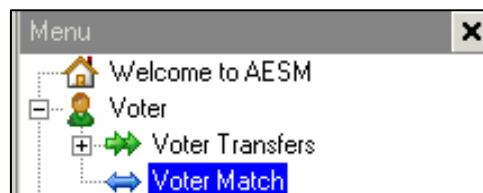
Felon Matching



It is the municipal clerk's duty to confirm or deny any felon match based on the information provided by SVRS and any other reliable information the clerk has on hand. For Providers, this may mean generating reports for Reliers to use in deciding whether to confirm or deny a felon match. For Reliers, it will mean examining the report, confirming or denying each potential felon match, and returning the report to the Provider, who will manage the results accordingly. Self-Providers may choose to skip generating that report. When a user confirms a Felon Match in SVRS, the voter's status is changed to Inactive so he or she will not appear on a poll list. These inactivated voters must receive a mailing informing them of that fact.

Manage Felon Matches.

1. Expand the **Voter** node on the Main Menu tree.
2. Click on the **Voter Match** node.
3. Use the **Match Type** drop down to restrict your search.



- Select **Felony Record** to search for voters who are potential matches with DOC felony records.

4. Click **Search**.



Leave the **Unresolved Matches** box checked to exclude those records you have already marked as a match or not a match. If you want to see those records as well, uncheck the box.

5. Manage Search Results.

- Double-click on the first record in the grid to open the **Match Details** screen.
- Use the information on the **Match Details** screen to decide whether to confirm the suggested match.
 - If you decide to confirm the match, change the **Match Status** field to **Confirmed Match**.

- Confirming a **Felony Record Match** will change the **Status** of the person's voter record to **Inactive – Felony Record Match**.

- If you decide not to confirm the match, change the **Match Status** field to **Not a Match**.
 - If the date in the **Action Date** field has passed, the felon has finished his or her post-correctional supervision, and is again eligible to vote. You should mark this record as **Not a Match**, even if the voter record and the felon record belong to the same person.

Action Date:	10/4/2008
--------------	-----------

Confirmed Match
Correction Expired
Invalid Felon, Clemency
Match Fell Below Threshold
Not a match
Unconfirmed Match
Under Investigation
<input type="button" value="x"/>

- c. Click **Save and Close**.



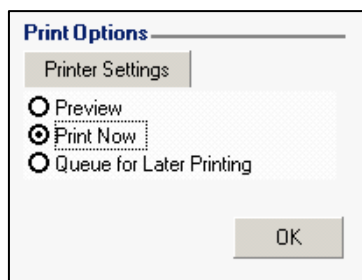
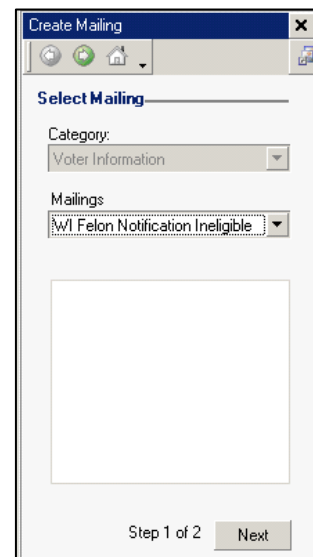
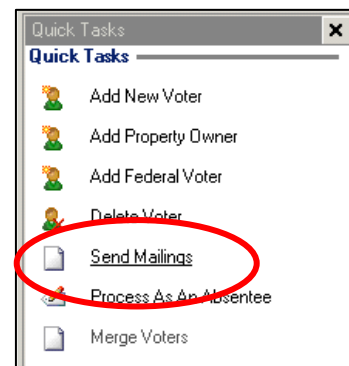
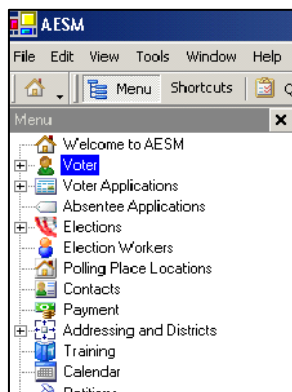
*Marking a match record as a **Confirmed Match** or as **Not a Match** will prevent SVRS from suggesting a match between that particular voter and that particular felon record in the future.*

Generate the WI Felon Ineligible Notification letter.

There are two ways to generate the WI Felon Ineligible Notification letter that must be mailed to the confirmed felon match. For individual voters, this letter can be generated from the the **Voter** node. For multiple voters, you may use the **Labels and Mailings** node.

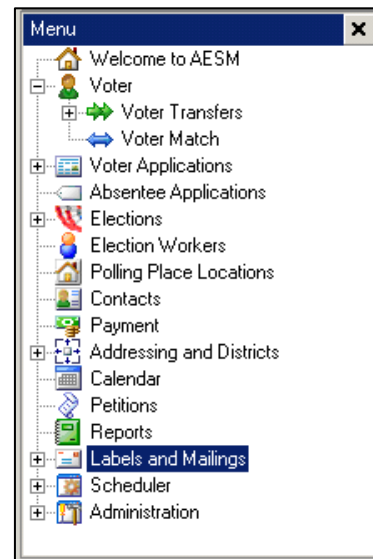
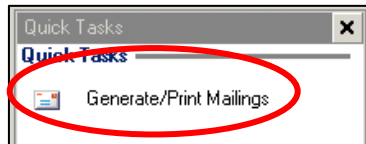
Using the Voter node:

1. Click the **Voter** node.
2. Enter the voter's last and first names and click **Search**.
3. Click once on the voter record to highlight it.
4. In the **Quick Tasks** pane, click **Send Mailings**.
5. In the **Mailings** list, select **WI Felon Notification Ineligible**.
6. Click **Next**.
7. Click **Printer Settings**, and adjust as needed.
8. Click the **Print Now** option button.
9. Click **OK**.
10. A dialog box will appear asking “**Did the mailing print successfully?**” Click **Yes**. This will create a record that the voter was sent the WI Felon Notification Ineligible letter.

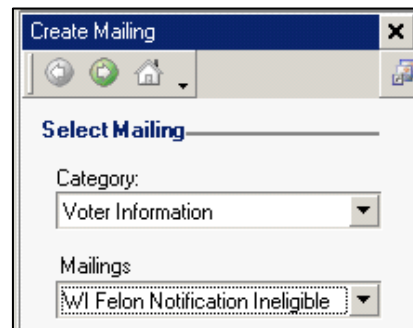


Using the Labels and Mailings node:

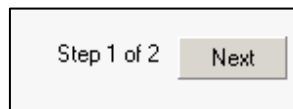
1. On the main menu tree, click the **Labels and Mailings** node.
2. On the **Quick Tasks** pane, click **Generate/Print Mailings**.



3. Change the **Category** to **Voter Information**.
4. In the **Mailings** list, click **WI Felon Notification Ineligible**.



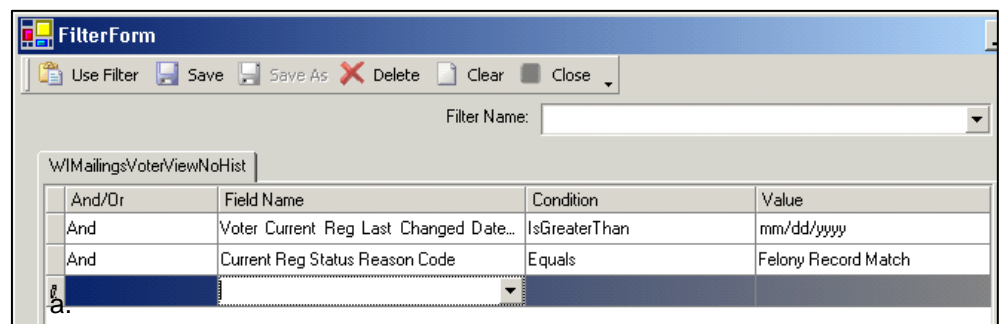
5. Click **Next**.



6. **Filter** your mailing:
 - a) Click the **Custom** button to open a filter window.



- b) Create a filter that matches this screenshot. Enter the date desired (the day before you began making the latest round of felon matches) in mm/dd/yyyy format.



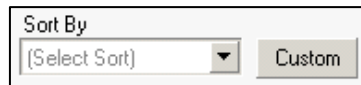
- c) Click **Use Filter**.



*This filter will select all voter records that have had their status changed to **Inactive – Felony Record Match** after the date specified.*

7. **Sort** your mailing:

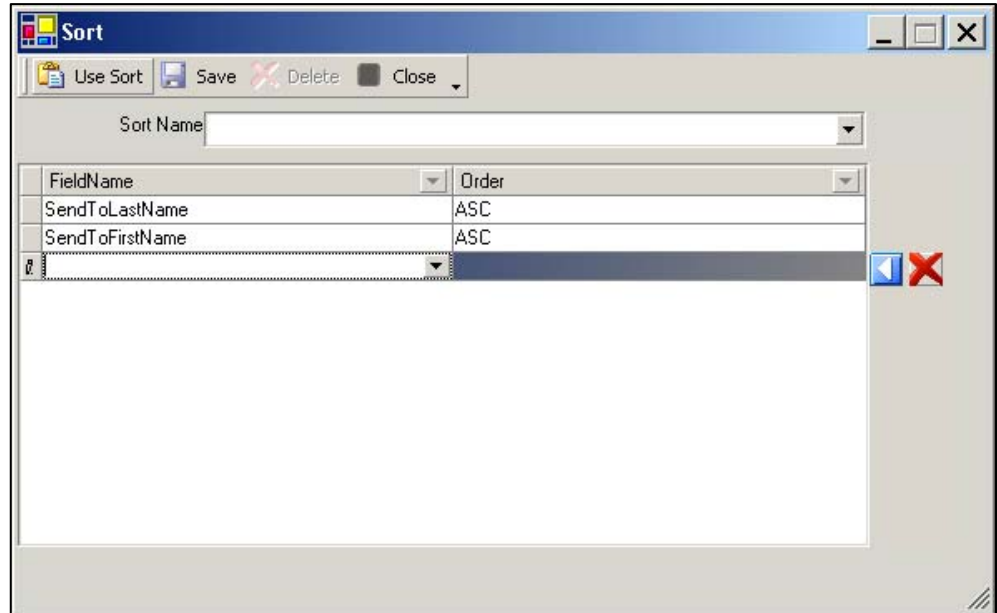
- a) Click the **Custom** button.
- b) Create a sort that matches the following screenshot:
- c) Click the **Use Sort** button.



Sort By
(Select Sort) Custom



This sort will put your letters in order by the voter's last name, then first name. You can adjust this sort if desired.



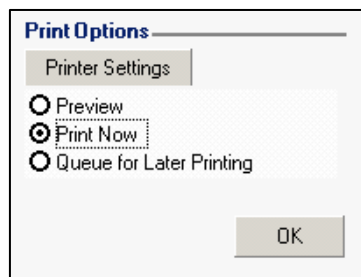
Sort

Use Sort Save Delete Close

Sort Name

FieldName	Order
SendToLastName	ASC
SendToFirstName	ASC

8. Adjust **Printer Settings**, as needed.
9. Click the **Print Now** option button.
10. Click **Print**.



Print Options

Printer Settings

☐ Preview
☒ Print Now
☐ Queue for Later Printing

OK

11. A dialog box will appear asking “**Did the mailing print successfully?**” Click **Yes**. This will create a record that the voter was sent the WI Felon Notification Ineligible letter.

A sample of the WI Felon Notification Ineligible letter is located on the next page.

Respond to WI Felon Notification Ineligible letter recipients.

- A sample of the WI Felon Notification Ineligible letter is shown. Please note that while Providers will generate this letter for their Reliers, the contact information is for the municipal clerk, so Reliers may need to respond to questions.
- Any person convicted of a felony in the State of Wisconsin has been informed multiple times that they will not be eligible to vote until after they have completed their post-correctional supervision.
- Someone may contact your office stating that they have completed their post-correctional supervision. If so, the Department of Corrections will have provided them with documentation proving when their supervision ended. This end date is also called the separation date. Once the person has provided you with proof that their separation date has passed, they can re-register to vote with a new GAB-131 Voter Registration Application.

City Of Madison

Maribeth Witzel-Behl / City Clerk
210 MARTIN LUTHER KING JR BLVD
MADISON, WI 53703
(608) 266-4601

August 26th, 2009

Jane Smith
25 Davison St
Madison, WI 53715

Dear Jane Smith,

This letter concerns your right to vote in the State of Wisconsin. Please read it all.

Information sent to the Statewide Voter Registration System recently from the Department of Corrections indicates that you were convicted of a felony in Wisconsin and have not yet fulfilled the requirements of your sentence. For that reason, your voting status has been changed to *ineligible* until you have completed the terms of your sentence including any terms of supervision, probation or parole. At this time you cannot vote in Wisconsin.

If the above information is incorrect, please contact us in the clerk's office at the address listed at the top of this letter. Our office will ask you for more information to verify and correct your personal voter registration data.

If the above information is correct, you must wait until you have completed the terms of your sentence including any terms of supervision, probation, or parole before you can vote again in Wisconsin. State law does not allow residents convicted of a felony to vote, register to vote, or attempt to vote until they have finished the terms of their sentence including any terms of supervision, probation or parole.

If the above information was true, but you have completed your sentence including any terms of supervision, probation or parole, please contact us in the clerk's office and show us a copy of the discharge certificate which describes the restoration of your civil rights from the Department of Corrections.

Thank you for your interest in voting and elections in Wisconsin.

Sincerely,

Maribeth Witzel-Behl
City Clerk
City Of Madison - 13251

- If someone contacts your office stating that he or she received a letter, but has never committed a felony, please contact the GAB Help Desk. We will work with the Department of Corrections to resolve the issue.

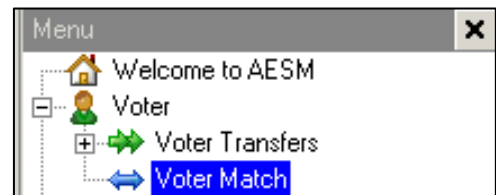
Death Matching



It is the municipal clerk's duty to confirm or deny any death match based on the information provided by SVRS and any other reliable information the clerk has on hand. For Providers, this may mean generating reports for Reliers to use in deciding whether to confirm or deny a death match. For Reliers, it will mean examining the report, confirming or denying each potential death match, and returning the report to the Provider, who will manage the results accordingly. Self-Providers will perform each of these steps, but they may choose to skip generating the WI Voter Match Report. When a user confirms a death match in SVRS, the voter's status is changed to Cancelled so he or she will not appear on a poll list.

1. Search for Potential Matches.

- Expand (+) the **Voter** node on the Main Menu tree.
- Click on the **Voter Match** node.
- Use the **Match Type** drop down to restrict your search.
 - Select **Death Record** to search for voters who are potential matches with DHS death records.
- Click **Search**.



Last Name:	First Name:	Middle Name:	<input checked="" type="checkbox"/> Unresolved Matches
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Match Type:	Date of Birth:	Soc Sec Num:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
	From Date:	To Date:	
Death Record	Between <input type="text"/>	and <input type="text"/>	
Felony Record			
Voter Record			
	<input type="checkbox"/> Count Only	<input type="button" value="Search"/>	<input type="button" value="Clear"/>



Leave the **Unresolved Matches** box checked to exclude those records you have already marked as a match or not a match. If you want to see those records as well, uncheck the box.

Manage Search Results.

- Double Click on the first record in the grid to open the **Match Details** screen.
- Use the information on the **Match Details** screen to decide whether to confirm the suggested match.

Match Details

Source	Name	Date of Birth	Gender	Race	Soc Sec Num	
13251	DOE, MARY E	01/01/1900				<i>{Voter Record}</i>
Addr: 230 RANDOLPH Drive						
	DOE, MARY ELIZABETH	01/01/1900			###-##-0000	<i>{Death Record}</i>
Addr:						

Additional Information

Voter

Voter Status: Inactive Date Registered: 11/8/1988 Date Last Activity: Gov ID:

Death

Date Of Death: 01/01/2008 County Of Death: Residence Cnty:

Match

Match Status: Unconfirmed Match Match Basis: LNFNDB Created On: 8/25/2007

Match Rank: 85 Last Changed On:

- If you decide to confirm the match, change the **Match Status** field to **Confirmed Match**.
 - Confirming a Death Record match will change the status of the person's voter record to **Cancelled – Deceased – Death Record Match**.
- If you decide not to confirm the match, change the **Match Status** field to **Not a Match**.

Match Status: Unconfirmed Match

Match History

Drag a column header to the Match History list

Match Status

Unconfirmed Match

Confirmed Match

Correction Expired

Invalid Felon, Clemency

Match Fell Below Threshold

Not a match

Under Investigation

- Click **Save and Close**.



Marking a match record as a **Confirmed Match** or as **Not a Match** will prevent SVRS from suggesting a match between that particular voter and that particular death record in the future.

Duplicate Voter Matching



One of the main functions of a statewide voter list is to prevent a single person from having duplicate voter records. It is the municipal clerk's duty to confirm or deny any potential duplicate matches based on the information provided by SVRS and any other reliable information the clerk has on hand. For Providers, this will mean generating reports for Reliers to use in deciding whether to confirm or deny a match. For Reliers, it will mean examining the report, confirming or denying each potential match, and returning the report to the Provider, who will manage the records accordingly.



*Providers and Self-Providers should first generate the WI Voter Match Report and merge any confirmed duplicate voter records. This will cause the suggested matches to disappear from the Voter Match node. The Voter Match node will then show only those records that are **Not A Match**, and users must deal with them by following the directions below.*

1. Merge Duplicate Records

- a. Click on the **Voter** node.
- b. Change the jurisdiction drop down in the search grid to **State of Wisconsin**.
- c. Search for the first person on your list of voters with duplicate records. Your search should return multiple records.

- d. Open up each voter record and verify which record is the most recent. See the Voter chapter of this manual for more details.
 - Check the **Voter Status**, the **Application Date** on the **Other** tab, the **Date Last Voted**, **Date Registered**, and **Last Date Changed**. Check them all, do not rely on one single field.
 - If the most recent record is in another municipality, that municipality must perform the merge. **DO NOT** perform the merge. If the **Voter Status** of the record in your municipality is still **Active**, open the record and make it **Inactive** so the voter no longer appears on your poll list.

- e. In your search results, click on the record of the voter in your municipality
- f. Find the record of the voter you confirmed as a match. Hold the **Ctrl** key and click on this second record. You should now have two records highlighted in the grid.
- g. Click the **Merge Voter** Quick Task to open the merge voters pane on the left of the screen.

Jurisdiction	Name	Date Of B...	Place Of Bir...	Party	Gen...	Status
50173	DOE, KAREN M	01/01/1900		Not Applicable		Active
16026	DOE, KATHLEEN KUR...	01/01/1900		Not Applicable		Active
13251	DOE, KATHRYN S	01/01/1900		Not Applicable		Active
41251	DOE, KAITH	01/01/1900		Not Applicable		Inactive
13154	DOE, KARL P	01/01/1900		Not Applicable		Active
60165	DOE, KATHLEEN DIAN...	01/01/1900		Not Applicable		Active
30016	DOE, KATHLEEN T	01/01/1900		Not Applicable		Active
32246	DOE, KATHLEEN	01/01/1900	BOSTON, MA	Not Applicable		Inactive
13255	DOE, KAREN	01/01/1900	US	Not Applicable		Active
30241	DOE, KATHLEEN R	01/01/1900		Not Applicable		Active
05106	DOE, KATHY A.	01/01/1900		Not Applicable		Active
67291	DOE, KATHRYN J	01/01/1900		Not Applicable		Active
45034	DOE, KAREN ANN	01/01/1900		Not Applicable		Active
71020	DOE, KATHLEEN JEAN	01/01/1900		Not Applicable		Active
08201	DOE, KATHRYN S	01/01/1900		Not Applicable		Active
13008	DOE, KATHRYN A	01/01/1900		Not Applicable		Active
13282	DOE, KATHRYN A	01/01/1900		Not Applicable		Inactive
38024	DOE, KATHLEEN MAR...	01/01/1900		Not Applicable		Active
65006	DOE, KATHLEEN	01/01/1900		Not Applicable		Active
50173	DOE, KAREN L	01/01/1900		Not Applicable		Active

- If one of the records belongs to another municipality, you will see the following message. Click **Yes**.

One of the selected voter records is currently owned by CITY OF SUN PRAIRIE - 13282. Do you wish to continue with the merge?

Quick Tasks

Quick Tasks

- Add New Voter
- Add Property Owner
- Add Federal Voter
- Delete Voter
- Send Mailings
- Process As An Absentee
- Merge Voters**

- h. A new **Merge Voters** panel will replace the main **Menu** area and **Quick Task** panel on the left. Determine which record will be the master record. The merged record will include voting history from both records, if present.



More information is displayed by clicking and dragging to the right the gray bar separating **Merge Voters** from the search panel.

AESM

File Edit View Tools Window Help

Menu Shortcuts Quick Tasks Active Jurisdiction: TOWN OF BLOOMING GR...

Merge Voters

Select Master

MasterRecord	Name	DateOfBirth
<input checked="" type="radio"/>	DOE, KATHRYN A	01/01/1900
<input type="radio"/>	DOE, KATHRYN A	01/01/1900

Voter Details

Field Name	Field Data
First Name	KATHRYN
Last Name	DOE
Middle Name	A
Date of Birth	01/01/1900 12:00...
Social Security N...	
Registration Date	1/1/1919 12:00:0...
Voter Registratio...	0000040008
Last Date Chang...	3/24/2007 8:25:3...
Gender	
Driver's License	A000-0000-0000...
Owner	TOWN OF BLO...
Address	4028 UNDERDA...

General Districts Other Elections

Last Name: adams First Name: ka Middle Name: Suffix:
 Voter Reg Num: Date of Birth: Soc Sec Num: Status:
 House No: Street Name: City: State: ZIP Code:

Records Returned: 108 In [ATE OF WISCONSIN - WI] ☐ Count Only Search Clear

Drag a column header here to group by that column

Jurisdiction	Name	Date Of B...	Place Of Bir...	Party	Gen...
52151	DOE, KARL P	01/01/1900		Not Applicable	
50173	DOE, KAREN M	01/01/1900		Not Applicable	
16026	DOE, KATHLEEN KUR...	01/01/1900		Not Applicable	
13251	DOE, KATHRYN S	01/01/1900		Not Applicable	
41251	DOE, KAITH	01/01/1900		Not Applicable	
13154	DOE, KARL P	01/01/1900		Not Applicable	
60165	DOE, KATHLEEN DIAN...	01/01/1900		Not Applicable	
30016	DOE, KATHLEEN T	01/01/1900		Not Applicable	
32246	DOE, KATHLEEN	01/01/1900	BOSTON, MA	Not Applicable	
13255	DOE, KAREN	01/01/1900	US	Not Applicable	
30241	DOE, KATHLEEN R	01/01/1900		Not Applicable	
05106	DOE, KATHY A.	01/01/1900		Not Applicable	
67291	DOE, KATHRYN J	01/01/1900		Not Applicable	
45034	DOE, KAREN ANN	01/01/1900		Not Applicable	
71020	DOE, KATHLEEN JEAN	01/01/1900		Not Applicable	
08201	DOE, KATHRYN S	01/01/1900		Not Applicable	
13008	DOE, KATHRYN A	01/01/1900		Not Applicable	
13282	DOE, KATHRYN A	01/01/1900		Not Applicable	
38024	DOE, KATHRYN J	01/01/1900		Not Applicable	
65006	DOE, KAREN ANN	01/01/1900		Not Applicable	
50173	DOE, KATHLEEN JEAN	01/01/1900		Not Applicable	

108 Record(s) returned

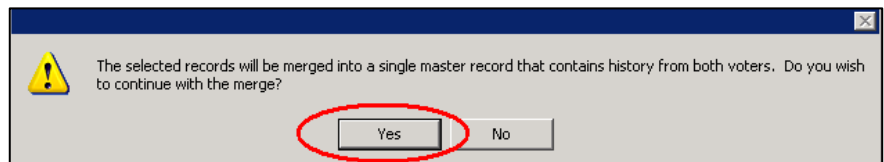
- i. Select the **Master Record** using the radio button to the left of that record. Information for that record will be displayed in the boxes below.



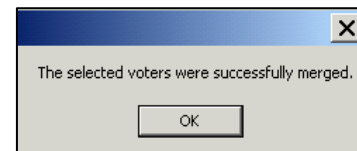
*Note: Information from the other record will be archived, but not necessarily show up in the merged record. For example, you may want to keep a middle name or initial or a social security number not present in the **Master Record**. Write down this information now, and enter it into the **Master Record** after the merge.*

- j. Click the **Merge Voters** button.

- k. A warning message will appear, "**The selected records will be merged... Do you wish to continue?**" Click **Yes**.



- l. A confirmation message will appear, "**The selected voters were successfully merged.**" Click **OK**.



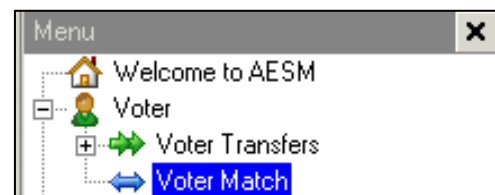
- m. The **Merge Voters** panel will disappear and the Main Menu and Quick Tasks will reappear.



For information on how to obtain a list of voters that have been merged out of your municipality, see the Voter chapter of this manual.

2. Search for Remaining Matches in the Voter Matches Node.


- a. Expand (+) the **Voter** node on the Main Menu tree.
- b. Click on the **Voter Match** node.
- c. Use the **Match Type** drop down to restrict your search



- Select **Voter Record** to restrict your search to voters with multiple records in SVRS.

Last Name:	First Name:	Middle Name:	<input checked="" type="checkbox"/> Unresolved Matches
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Match Type:	Date of Birth:	Soc Sec Num:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Between		From Date:	To Date:
		<input type="text"/>	<input type="text"/>
<div> Death Record Felony Record Voter Record </div>		<input type="checkbox"/> Count Only <input type="button" value="Search"/> <input type="button" value="Clear"/>	

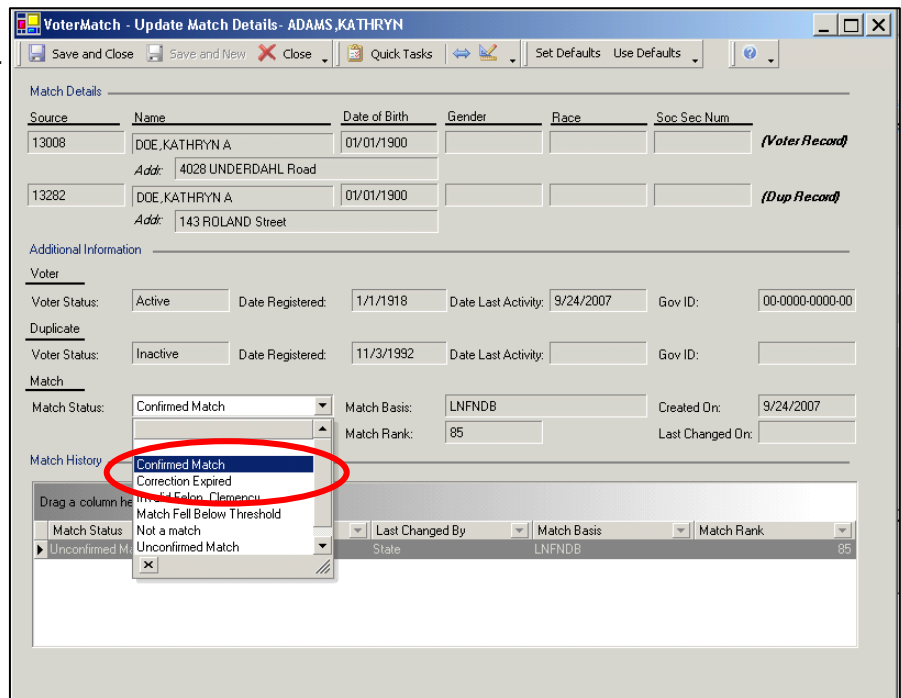
- d. (Optional) Set a **From Date** and **To Date** to limit your search to just those potential matches created between set of dates.
- e. Use other search fields as desired.
- f. Click **Search**.

 Leave the **Unresolved Matches** box checked to exclude those records you have already marked as a match or not a match. If you want to see those records as well, uncheck the box.


3. Manage Search Results.

If you have already followed the steps above and merged any duplicate records, the search grid will only show records that are **Not a Match**. If you find any remaining records that are duplicates, confirm them as matches, write down the voter's information, and follow the steps above to merge the records together.

- a. Double Click on the first record in the grid to open the **Match Details** screen.
- b. Use the information on the **Match Details** screen to decide whether to confirm the suggested match.
 - If you decide not to confirm the match, change the **Match Status** field to **Not a Match**.
 - If you decide to confirm the match, change the **Match Status** field to **Confirmed Match**.
 - Write down the name of any voter you mark as a **Confirmed Match**. You will need to follow the steps above and merge any duplicate records.



- c. Click **Save and Close**.

 Marking a match record as a **Confirmed Match** or as **Not a Match** will prevent SVRS from suggesting a match between those voter records in the future.