Table of Contents

Setting Up an Election Worker 2
Using Election Workers 4
Updating Election Worker Usage History 5
Setting up Special Registration Deputies using the Election Worker Node 6
Entering Training Information for Election Workers 7
Information on Election Workers and Trainings 8

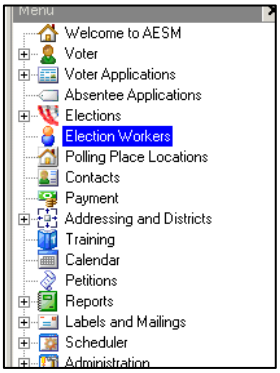
Setting Up an Election Worker

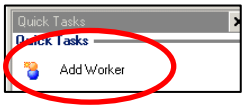
In SVRS, a person must have a Contact Record before you will be able to set them up as an Election Worker. All registered voters have Contact Records, but the voter record should not be used to create an Election Worker Record. A new Contact Record should be created for these individuals. See the Contacts chapter of this manual for information on creating contact records.

The Election Worker record can be used to track not only work history by election, but also training. The GAB uses Election Worker records to keep track of municipal clerk training and Special Registration Deputies.

Add an Election Worker Record.

Before you add an Election Worker, you should make sure the worker has a contact record on file that is not a voter contact record. If you are given lists of potential poll workers from local political parties, you must also make sure that the contact record has the worker's partisan affiliation. See the Contacts chapter of this manual for further information.

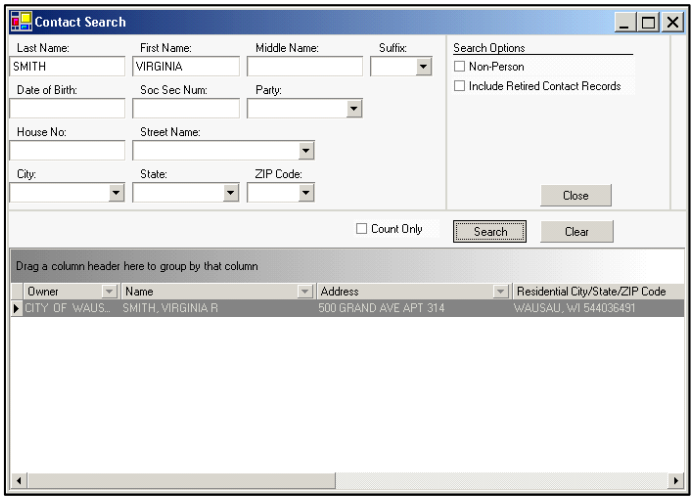




1. In the Main Menu, click on the **Election Workers** node.
2. Click the **Add Worker** Quick Task.
3. Enter election worker information into the **ElectionWorker** form.

   a. Attach a Contact Record.

   - Click the **Address Book Icon** next to the **Name** field.
   - Search for the worker's **Contact** record.
   - Double-click on the correct name in the grid to select, which fills in the **Contact Identification** section of the form.
   - This will bring the contact information into the **Election Worker** record. If you have selected the wrong contact. Click the **Address Book Icon** again and select the correct one.



b. Enter the **Normal Position**, for reference only. The election worker can be assigned a different position within an election.

c. Enter the **Normal Ward**.

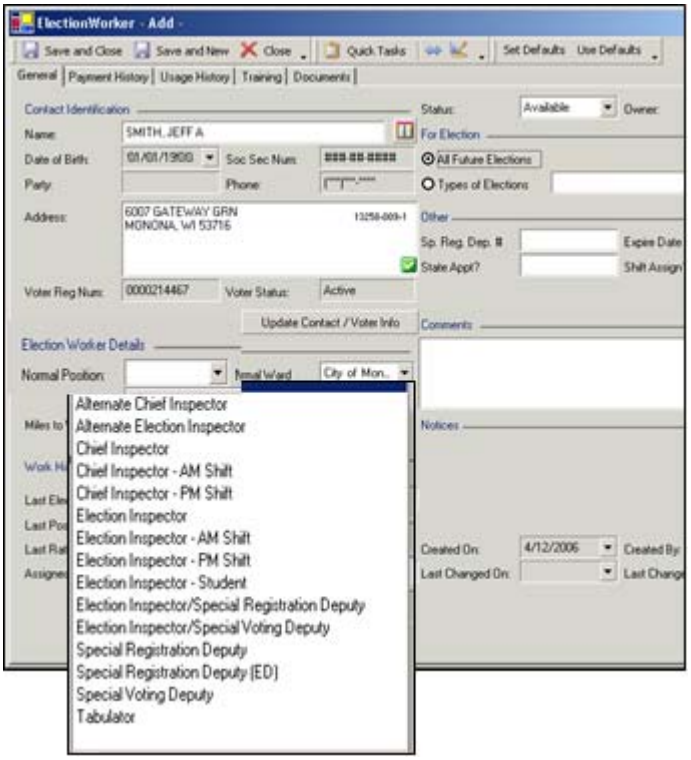
d. Many fields, like the **Needs Transportation** checkbox, **Miles to Work**, **Overall Rating**, **Shift Assign?** and **Comments**, are optional. Remember that any **Comments** you enter may become public information.

e. Enter the **Status**. For new workers, enter **Available**.

f. Choose which elections the worker will be available: **All Future Elections** or specific **Types of Elections** such as **Partisan Primary**.

g. The **Sp. Reg. Dep. #**, **Expire Date**, and **State Appt?** fields are for **Special Registration Deputies** only.

h. Information on the **Usage History** and **Training** tabs will be entered later. You will not use the **Payment History** or **Documents** tabs.



4. Click the **Save and Close** button.

*You can now assign your election worker to an **Election** or a **Polling Place Assignment Plan**. To be available for an election, the worker must have a **Status** of **Available** and the election must be included under the type of elections you selected.*

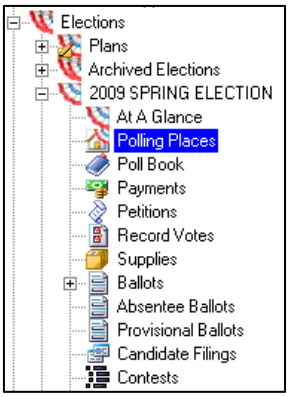
*If entering a group of election workers, you can create default values for the group. Enter the values into the fields that will not change, such as **Status** of **Available**, then click the **Set Defaults** button on the toolbar. Click on the **Use Default** button. When you open a new **Election Worker** record, the default data will be filled in.*

***Before you enter training information for an Election Worker record, you must Save and Close the record**. Otherwise, the training information will not be saved.*

Using Election Workers

Election Workers are assigned to work an election by being assigned to a Polling Place Assignment Plan (PPAP) or being directly assigned in the Polling Places sub-node of an Election.

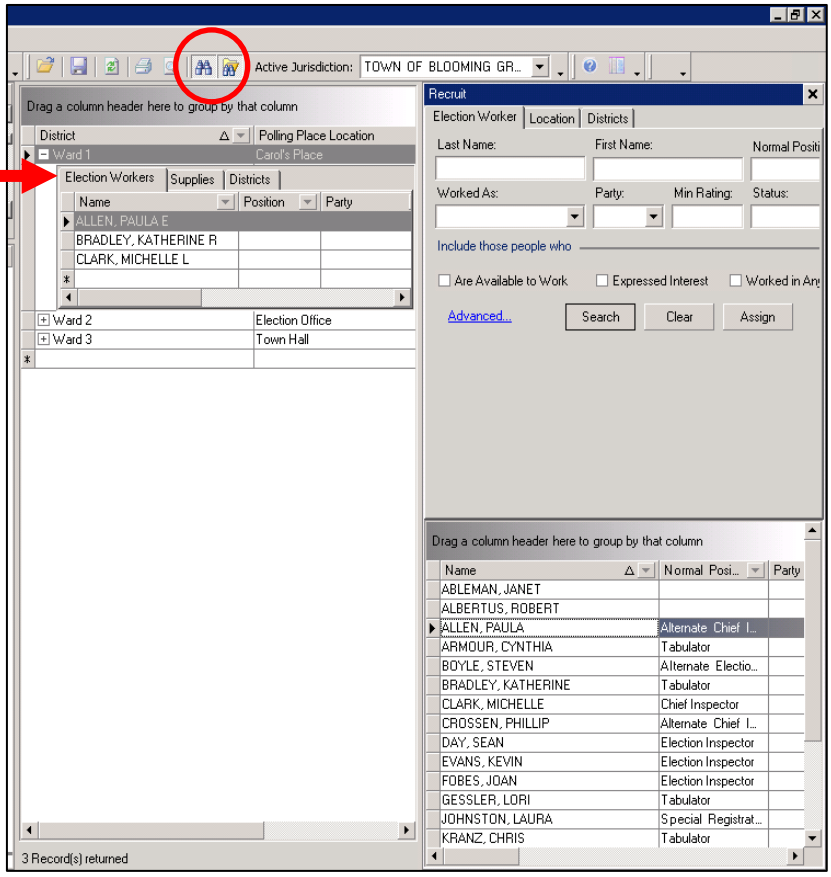
1. Find the **Election** in the Main Menu tree.
   a. Expand **(+)** the **Elections** node.
   b. Expand **(+)** the specific election.
2. Click on the **Polling Places** sub-node**.** The **District - Polling Place Location** grid appears.



3. Click on the **Recruit** icon on the toolbar. The **Recruit** panel will appear on the right. The names of all the **Election Workers** will appear in the **Recruit** panel on the **Election Worker** tab. You can search for one or more workers by entering a **Name**, **Polling Place**, **Normal Position (Worked As)**, **Party** or **Status**.

   *Names in red are **Unavailable** due to their status or because they have been recruited for the election already.*

4. **Assign Election Workers.**
   a. Select the **Polling Place** and expand by clicking on the **(+)** to view the Election Workers. This appears in a nested grid underneath the **District and Polling Place Location** information.
   b. Click on a **Name** in the **Recruit** panel to select.
   c. Click the **Assign** button. The Election Worker selected should appear on the Polling Place grid.



   d. Repeat steps a through c above for each **Election Worker** and **Polling Place**.

See the Polling Place Assignment Plans (PPAP) section in the Election Setup chapter for details on how to recruit Election Workers into a plan.

Updating Election Worker Usage History

Indicating an Election Worker actually worked for a particular election is done *after* Election Day, but before the last Election Milestone, Milestone #9– Election Closed is set.

An Election Worker's record contains a Usage History tab with two panes: Used in Previous Elections and Recruited for an Upcoming Election. When an Election Worker is recruited for a specific election or a PPAP, the election will automatically appear in the Usage History tab, in the Recruited for Upcoming Election pane.

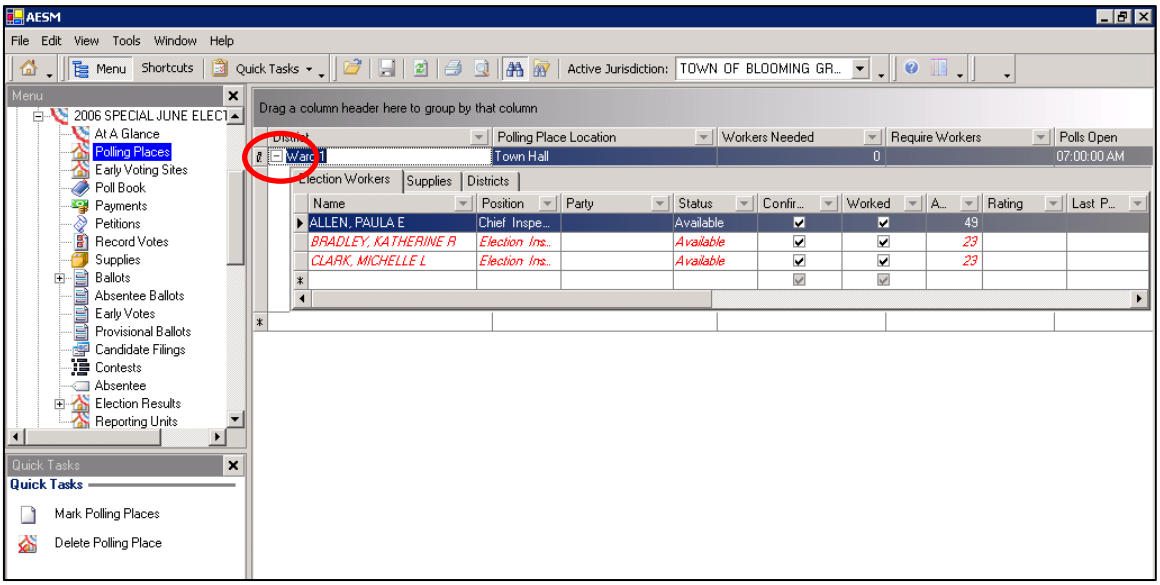
When an election is completed, the Polling Place information can be updated to indicate which Election Workers actually worked that election. The information then moves to Used in Previous Elections tab.

1. Open the **Polling Place** sub-node within the election.
   a. Expand **(+)** Elections node in the Main Menu tree.
   b. Expand **(+)** the specific election.
   c. Click on the **Polling Places** sub-node.
   d. Expand **(+)** the **Polling Place** where the **Election Worker** is assigned, to display the **Election Workers**.

2. Mark the worker's record.

   a. Check the **Worked?** box in the data grid for all **Election Workers** who worked that election.

3. The election information in the **Election Workers Usage History** tab will move from the **Recruited for an Upcoming Election** pane to the **Used in Previous Election** pane**.**



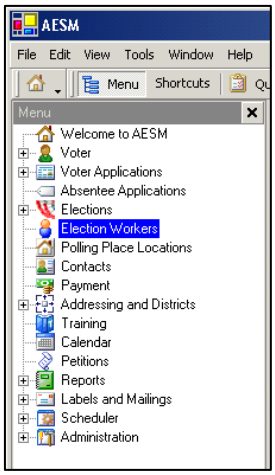
Setting up Special Registration Deputies using the Election Worker node

Special Registration Deputies (SRDs) are tracked in SVRS using the Election Worker node. To be recorded as a SRD in SVRS, that person must have a contact record.

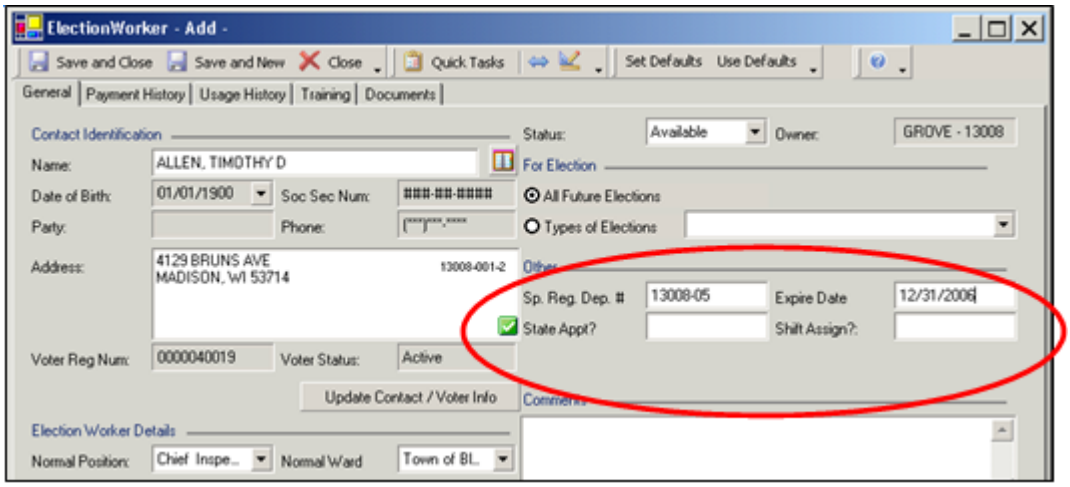
A municipal clerk can deputize any properly trained, qualified elector as a Special Registration Deputy for his or her municipality. The Government Accountability Board can train and deputize SRDs for the entire state. Each SRD is assigned a unique ID number by the level of government who appointed him or her. This number – whether state or locally-issued – must be written on any voter registration applications they accept and is then entered into SVRS along with the voter application information.

Providers and Self-Providers are responsible for tracking the SRDs whom they or their Reliers have appointed in SVRS; while the GAB will enter the tracking information for SRDs appointed at the state level. See the Elections Division website, http://elections.state.wi.us/, for more information.

Assigning a Special Registration Deputy Number



1. Open **Election Worker record** (or create a new one if it does not exist).
   a. Click on the **Election Workers** node in the Main Menu tree.
   b. Click on **Search** to bring up the list of Election Workers, or use the Search pane to find a specific name.
   c. Double-click on a worker's record to open the **ElectionWorker-Update** form.
2. Enter the **Special Registration Deputy Number** and the **Expire Date**. If you are a state user, you will enter **Yes** in the **State Appt?** field.
3. Click **Save and Close**.



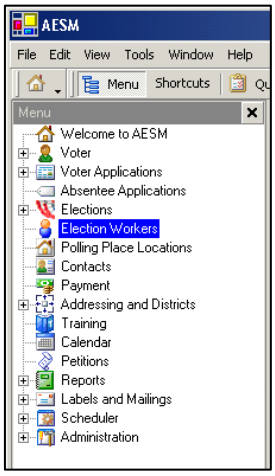
Special Registration deputies are appointed for two year terms ending on December 31st of even numbered years. They can renew their SRD status by requesting another term and attending a training class. See the next page for details on how to track training and certification information.

Record Election Worker Certification / Training Information

Training and certification requirements for Municipal Clerks, Election Inspectors, and Special Registration Deputies can be tracked in SVRS using the Election Worker node.

The GAB tracks training requirements for Municipal Clerks and Special Registration Deputies appointed at the state level. Local clerks may choose to use SVRS to track the hours and type of training for Chief Inspectors and other poll workers.

Record Election Worker Certification / Training Information



1. Open **Election Worker record** (or create a new one if it does not exist).

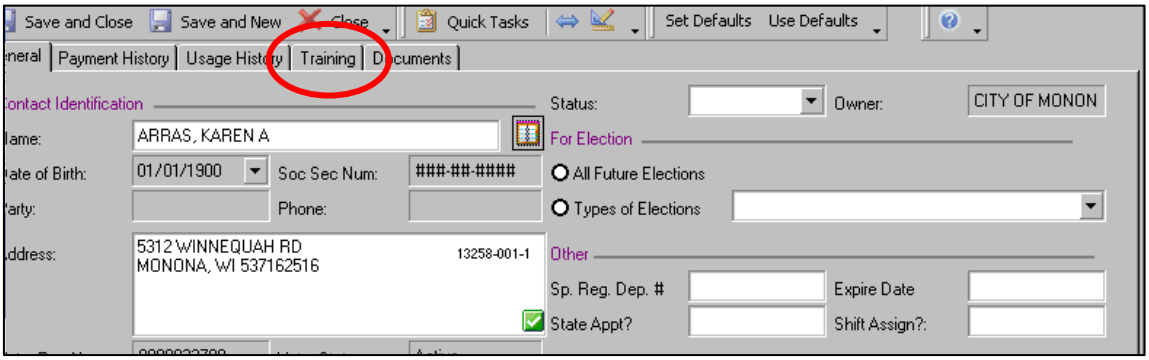
   Before you enter training information for an Election Worker record, you must Save and Close the record*. Otherwise, the training information will not be saved. If you are working with a new* ***Election Worker*** *record,* ***Save and Close*** *and then reopen the record.*

   a. Click on **Election Workers** node.

   b. Click on **Search** to bring up the list of **Election Workers**, or use the search panel to find a specific name.

   c. Double-click on a worker's record to open the **ElectionWorker-Update** form.

2. Click the **Training** tab.



3. Enter the training information.

   a. Select the proper training class from the **Training Session** drop down list.

   b. Check that the person **Attended**.

   c. Enter the **Date Attended**.

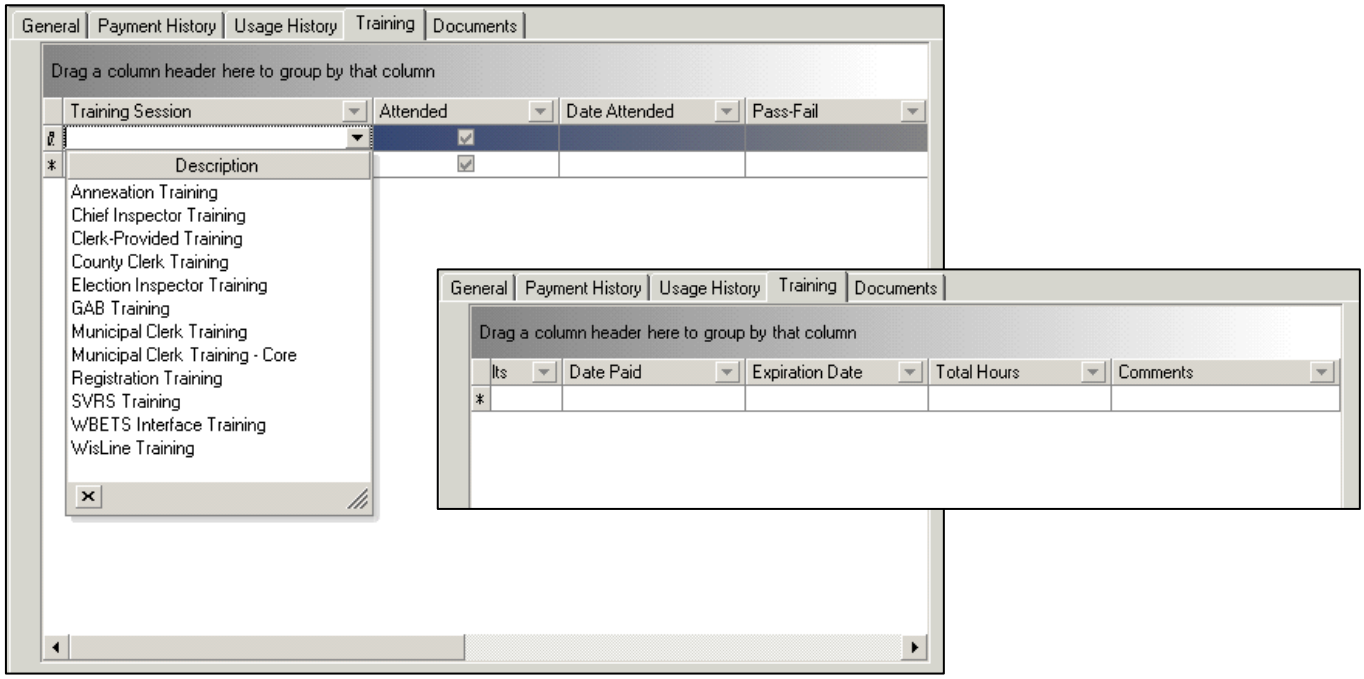
   d. Enter **Pass** if the person completed the class.

e. Use the **Scroll Bar** at the bottom of the grid to move to the right and enter more data.

f. Enter the **Expiration Date** of their training (for example, the end of their term as a SRD or Chief Inspector.

g. Enter the **Total Hours** earned for that class.

h. Enter **Comments**. You may enter a class number or a SRD Number in the **Comments** field.



4. Click **Save and Close**.

Information on Election Workers and Trainings

The GAB tracks Municipal Clerk Training and Special Registration Deputies through the Election Worker node.

If you would like information on whether you have met your Municipal Clerk Training requirements, GAB staff can obtain it for you. For assistance, contact the Training Coordinator, your SVRS Specialist or the GAB Help Desk