

Table of Contents

Election Set Up	2
Key Terms.....	2
SVRS Election Cycle Checklist (Election Set-Up Portion).....	3
Create a Polling Place Assignment Plan	4
Add Details to a Polling Place Assignment Plan.....	5
Consolidating Districts into one Poll List	7
Create a Reporting Unit Plan.....	8
Add Detail to a Reporting Unit Plan	9
Setting up an Election.....	10
Inherit an Election	10
Create an Election	11
Check Milestone #2 - Activate the Election.....	14
Contests	15
Add a Contest for Elected Office	15
Add a Contest for a Referendum	17
Search for and Update a Contest.....	18
Candidate Filings.....	19
Add a Candidate Filing.....	19
Search for and Update a Candidate Filing	21
Check Milestone #3 - Ballot Setup Finalized	22
Generate Ballot Styles	23
Check Milestone #4 - Ballot Styles Finalized	24

Election Set Up

The Election Set Up chapter outlines the tasks clerks must perform to manage an election using SVRS.

Key Terms

Ballot Style: Ballot Style refers to the unique set of Contests and Candidates that will appear on a given voter's ballot. All voters with this exact same set of Contests and Candidates will have the same Ballot Style in SVRS, regardless of ward. Two voters whose ballots differ by even one Contest will therefore require different Ballot Styles.

Ballot Styles are created in SVRS at the municipal level, either by a Self-Provider or by a Provider for a Relier.

At present, the term 'ballot style' as used in SVRS is different and independent of the external ballot creation software. If your external ballot software generates a different 'ballot style' based on voting wards even if they share the same unique combination of contests and candidates, your external software will generate more 'ballot styles' than those generated in SVRS. SVRS does not create or print the actual ballots.

Contest: A race for elected office or a referendum question.

Election Inheritance: Election inheritance is the concept of sharing election administration across government units using SVRS. For example, the State is responsible for setting up the Spring Primary and Spring Election and the Fall Primary and General Election. Then counties will 'inherit' the election that the State has created to get the benefit of entry done by the State. Self-Providers and Providers on behalf of their Reliers then 'inherit' the election from the County, thus benefiting from the work done at the State and County level.

Election Owner (also known as 'Owner Jurisdiction): The election owner is the jurisdiction that created the election. An Election Owner will be the State (GAB), a County, or a Municipality, depending on the highest of these levels with a contest on the ballot at the election. School District contests are set up at the County level.

Election Setup Wizard: The Election Setup Wizard collects information about the election, whether you are inheriting an election or creating an election from scratch.

Milestone: Milestones represent major points in the SVRS election cycle that reflect and can affect the status of the election. See the following page for more information about election milestones.

Polling Place Assignment Plan: The Polling Place Assignment Plan (PPAP) is a reusable template that contains information about the wards, workers and supplies used at a polling place. If you group your poll books differently based on the type of election, you may have more than one Polling Place Assignment Plan. For example, you may have one template you use for Spring Elections, and one for Fall Elections.

Reporting Unit: A single ward or grouping of wards that collect and report election results entered into SVRS.

Reporting Unit Plan: Like Polling Place Assignment Plans, Reporting Unit Plans can be created and saved to be used during Election Setup. You must incorporate a Reporting Unit Plan into your election to be able to generate a results set and use SVRS to report canvassing numbers. .

The full SVRS Election Cycle Checklist (see [Appendix B](#)) outlines the steps clerks must perform to manage an election using SVRS. This page presents only those steps of the check list needed to set up an election.

SVRS Election Cycle Checklist (Election Set-Up Portion)

Milestones and Activities	Details
<input type="checkbox"/> 1. Create or Inherit an Election	<ul style="list-style-type: none"> • <i>Before</i> creating or inheriting an election, verify that you have added Polling Place Locations and created a Polling Place Assignment Plan. • <i>Before</i> creating or inheriting an election, verify that you have created a Reporting Unit Plan.
<input type="checkbox"/> ▪ Counties Inherit the Election from the State; Municipalities Inherit the Election from their County or Counties.	
<input type="checkbox"/> ▪ Assign Polling Place Assignment Plan and Reporting Unit Plan.	
<input type="checkbox"/> 2. Check Milestone 1: Election Setup	<ul style="list-style-type: none"> • Milestone 1 is automatically marked complete when the user completes the Election Setup Wizard.
<input type="checkbox"/> 3. Check Milestone 2: Election Active	<ul style="list-style-type: none"> • When Milestone 2 is checked, users can proceed to enter contests and candidates for that election.
<input type="checkbox"/> 4. Enter Detailed Election Information	
<input type="checkbox"/> ▪ Add Contests	<ul style="list-style-type: none"> ▪ <i>Before</i> entering a contest for an elected position, you must set up a corresponding Office Type. Clerks only need to create an Office Type for a position once, and can reuse it from election to election.
<input type="checkbox"/> ▪ Add Candidates	
<input type="checkbox"/> 5. Check Milestone 3: Ballot Setup Finalized Checked to signify that the clerk has accurately entered all contests and candidates for that election..	<ul style="list-style-type: none"> • Clerks may not make changes to contests and candidates while Milestone 3 remains checked. • In an inherited election, the election owner must be the first jurisdiction to check milestone three, followed by any inheriting jurisdictions in the following order: State -> County -> Municipality.
<input type="checkbox"/> 6. Generate Ballot Styles	<ul style="list-style-type: none"> • Clerks must do this step for voter names to print on poll books.
<input type="checkbox"/> 7. Check Milestone 4: Ballot Styles Finalized	<ul style="list-style-type: none"> • Clerks may not make changes to ballot styles while this milestone remains checked. • Do not make any changes to District Combos after generating ballot styles and before election day. • After Milestone 4 is checked, you may begin generating absentee ballots and poll books.

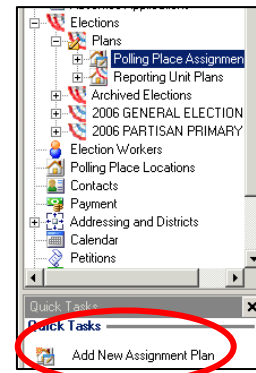
Create a Polling Place Assignment Plan



A Polling Place Assignment Plan (PPAP) is a reusable template listing the polling place locations, election workers, and supplies needed for a certain type of election. You can create and maintain multiple PPAPs if different types of elections use a different number of polling places or different polling place locations.

Prior to setting up a Polling Place Assignment Plan, you should create your Polling Place Locations and (optionally) Election Workers in SVRS. See the [Polling Places](#) and [Election Workers](#) chapters for more information.

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** node.
3. Click **Polling Place Assignment Plans**.
4. Click the **Add New Assignment Plan** Quick Task to open the **Polling Place Assignment Plan – Add** form.
5. In the **Assignment Plan Description** box, type a name for the Plan.
6. Select the appropriate **District Type** based on the Polling Place Assignment Chart:



Polling Place Assignment Chart

If you have:		Polling Place Assignment	If you want this type of 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 School)	<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 then Consolidate Districts (Pg. 7, this chapter)
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

7. Click **Save and Close** button.

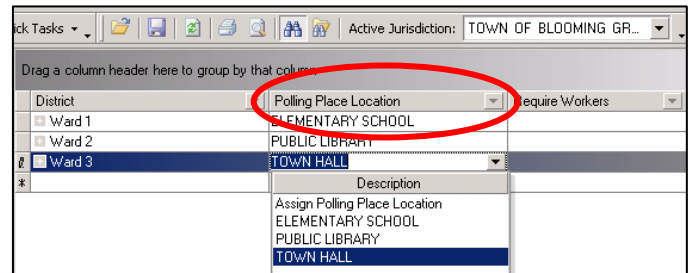
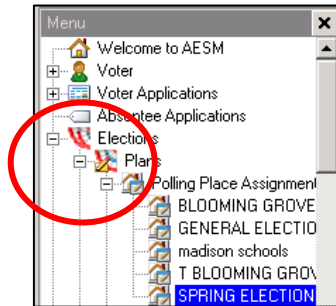
Add Details to a Polling Place Assignment Plan



After creating a Polling Place Assignment Plan, you must add details to tell SVRS which voting districts that polling place serves on election day. If you do not, your poll lists will not contain any names.

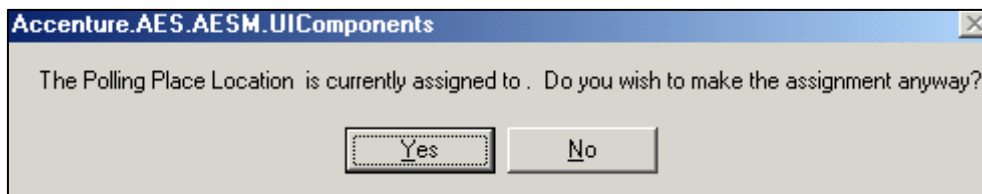
You may also add details about the election workers and supplies that the polling place needs for an election. Adding election workers and supplies is optional.

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** node.
3. Expand (+) the **Polling Place Assignment Plans** node.
4. In the menu tree, click on the name of the PPAP to which you wish to add details.
5. Assign a **Polling Place Location** to each district on the grid.
 - a. Click in the first empty box immediately below the **Polling Place Location** field name.
 - b. Click the drop down arrow and select the **Polling Place Location** serving the district listed on that row of the grid.
 - c. Repeat for each District in the grid.




Assigning polling places to an assignment plan affects the poll books for elections using that plan. SVRS will print one poll book for each row in your plan, containing the names of all the voters residing in the district or districts listed in the **Districts** column.

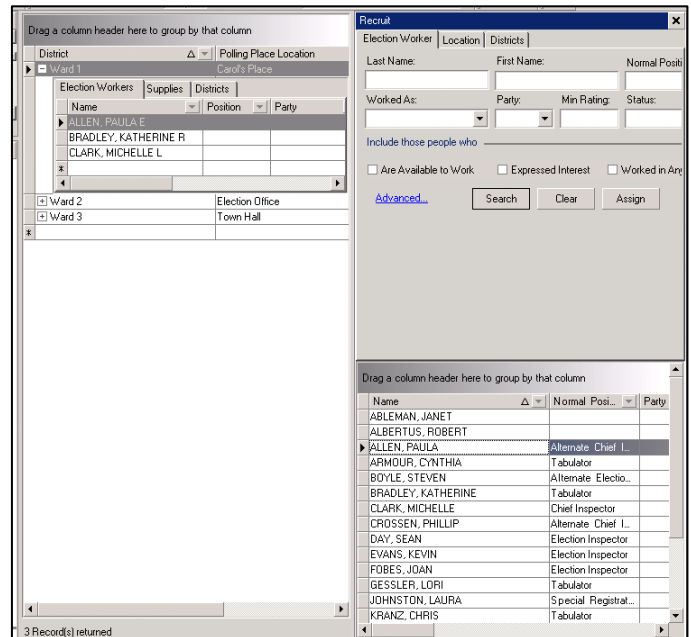
If you add the same polling place to two different Districts, you will receive the following message. Click **Yes** unless the duplicate assignment is a mistake.




Adding the same polling place to two or more districts listed on two or more rows will not produce a single list containing the names of all voters in those districts. To print in a single list, all districts must be added to a single row. To combine voters from different districts on the same poll list, follow the instructions for Consolidating Districts into one Poll List, starting on page 7 of this chapter.

6. Assign **Election Workers** to a Polling Place. (Optional)

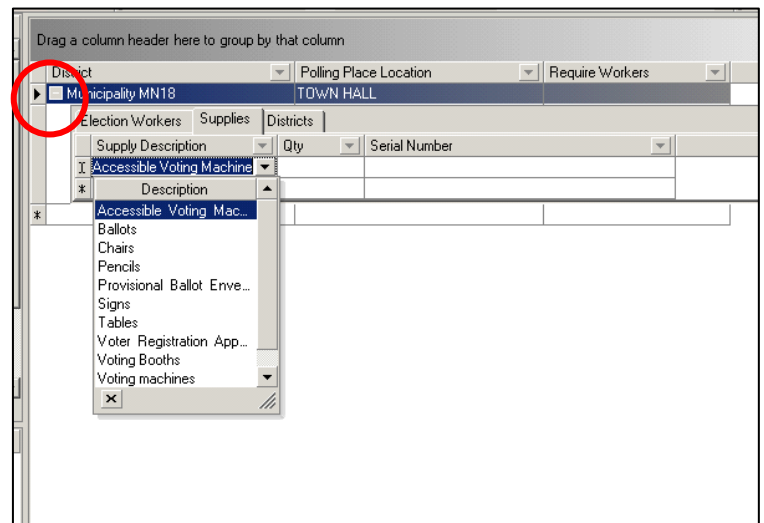
- Expand (+) the **District** to which you wish to assign poll workers.
- Click the **Election Workers** tab.
- Click the **Recruit** icon on the toolbar to open the **Recruit** pane. 
- In the **Recruit** pane, click the **Election Worker** tab.
- Click on the name of an **Election Worker** on the **Recruit** pane data grid and click **Assign**.
- Repeat this process for all election workers at each polling place.
- Close [x] the **Recruit** pane.



 Only people for whom you have added **Election Worker** records will appear in the data grid on the **Election Worker** tab of the **Recruit** pane. See the *Election Worker* chapter of this manual for directions on how to add these records.

7. Assign **Supplies** to a Polling Place. (optional)

- d. Expand (+) the **District** to which you wish to add supplies.
- e. Click the **Supplies** tab.
- f. Click in the first blank field in the **Supply Description** column.
- g. Click the drop down arrow and select a type of supply.
- h. Type an amount of the supply in the **Qty** box.
- i. Type a **Serial Number** or other identifying information.
- j. Repeat for each supply at each polling place.
- k. If the supply you wish to add isn't available in the **Supply Description** drop down, you may enter a quantity in the **Qty** column and enter the type of supply in the **Serial Number** field.




 Any changes made to the details of a polling place assignment plan are saved automatically.

Consolidating Districts into one Poll List



Any time a polling place location is used by multiple wards that report election results as a single unit, those districts can be consolidated within a PPAP. By doing this, the poll books you print will contain the names of all voters in those wards, listed in alphabetical order. If you prefer to have separate poll books for each ward sharing a polling place location, do not consolidate districts.

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** node.
3. Expand (+) the **Polling Place Assignment Plans** node.
4. Click the name of the plan in which you wish you consolidate districts.
5. Click on the row in the data grid for one of the **Districts** that you wish to consolidate.
6. Click the **Delete Polling Place** quick task.
7. SVRS will ask you to confirm your action, click **Yes**.
8. Repeat **Steps 5-7** for all but one of the districts you wish to consolidate.
9. Click the **Recruit**  icon on the toolbar to open the **Recruit** pane.
10. Click the **Districts** tab in the **Recruit** pane.
11. In the data grid of the **Recruit** pane, click on the district that you want to consolidate and drag it to the **District** box containing the ward it will join.



You can also assign wards to the plan by:

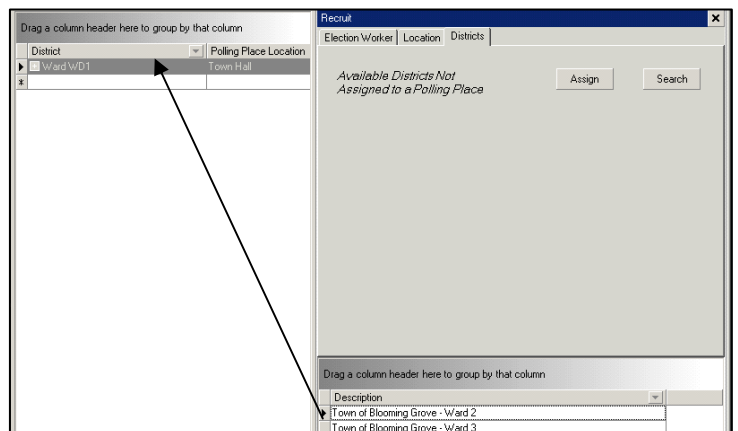
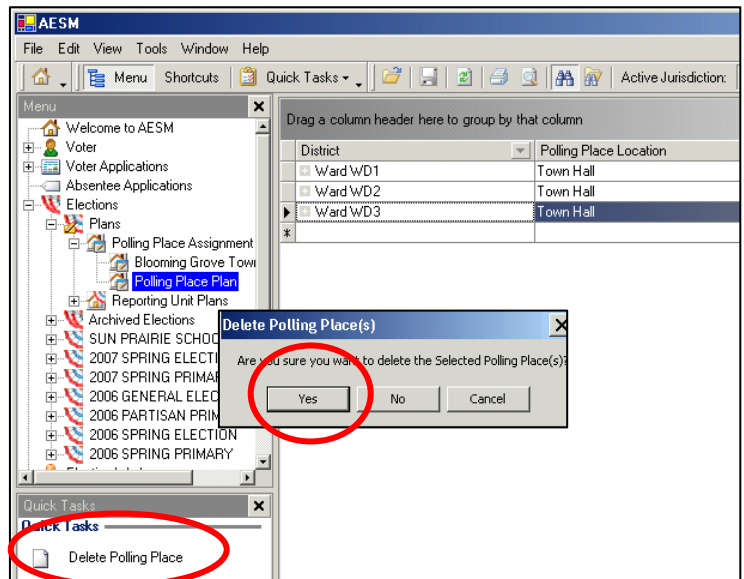
- On the main data grid, click the row where you would otherwise have dragged the districts you wish to consolidate.
- On the **Districts** tab of the **Recruit** pane, click the ward.
- Click **Assign**.

12. Repeat **Step 11** until all wards are assigned to a polling place.

- **Cons:**, meaning “consolidated” will appear in the **District** box for any row on which you have assigned multiple districts to a single polling place.

District	Polling Place Location	Require Workers
Cons: WD1, WD2, WD3	Town Hall	

13. Close [x] the **Recruit** pane.

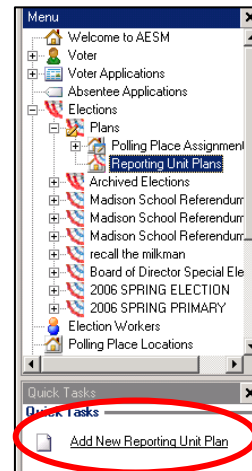


Create a Reporting Unit Plan



In order to capture election results in SVRS, you must first tell the system how your municipality reports election results. The first step in this process is creating a reporting unit plan. A reporting unit plan acts much like a PPAP by allowing you to create a reusable template to which you add details about how you report election results for a particular type of election.

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** node.
3. Click the **Reporting Unit Plans** node.
4. Click the **Add New Reporting Unit Plan** Quick Task to open the **ReportingUnits – Add** window.
5. In the **Reporting Unit Plan Description**, type a description for your plan. The name can be anything that you will recognize as a plan to use for a specific type of election.
 - For example, if you report election results differently based on whether it is a Spring or a General election, you would want two plans, one named Spring, and the other named General.



ReportingUnits - Add -

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

Reporting Unit Plan Description T OF BLOOMING GROVE FALL

Setup Reporting Units Based on this District Type Ward

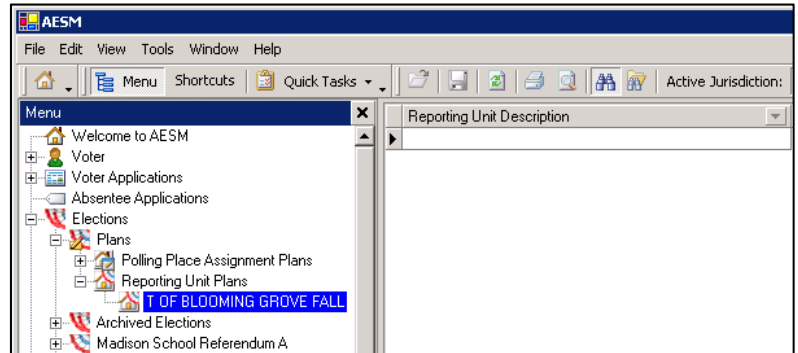
6. In the **Setup Reporting Units Based on this District Type** list, select **Ward**.
7. Click **Save and Close**.

Add Detail to a Reporting Unit Plan



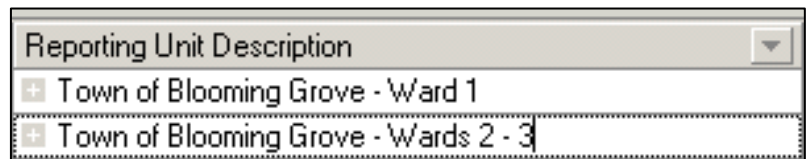
After creating a Reporting Unit Plan, you must add details about your specific reporting units. These details list which ward or group of wards are contained in which reporting unit(s).

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** node.
3. Expand (+) the **Reporting Unit Plans** node.
4. Click on the name of the plan to which you wish to add details.




5. Click in the first empty box under the column named **Reporting Unit Description** and type in the name of a specific reporting unit.

- The convention for naming a reporting unit is Municipality name – Ward # (or Wards # - #).



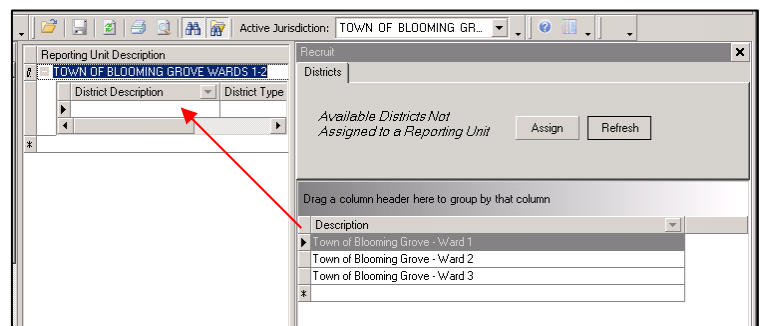
- Repeat this step for your remaining reporting units, entering each name into successive rows on this screen.

6. Click the **Recruit**  button in the toolbar to open the **Recruit** pane.

7. In the Recruit pane, click the **Districts** tab.

8. To associate your wards with the correct reporting unit:

- Click on a district in the **Recruit** pane data grid and drag it into the box with the name of the **Reporting Unit** with which you wish to associate that ward.
- Repeat this step until all wards are associated with a **Reporting Unit**.



Alternatively, you can assign wards to a reporting unit by:

- On the main data grid, click the row to which you want to add districts.
- On the **Districts** tab of the **Recruit** panel, click the ward.
- Click **Assign**.



Any changes made to the details of a reporting unit plan are saved automatically.

Setting up an Election



In SVRS, you will set up an election in one of two ways: 1) By inheritance, or 2) By creating a new election.

Counties will inherit:

- Every election at which there is contest for a federal or state office, or a statewide referendum.

Counties create:

- Every election at which there are contests for County or School District offices or referenda and no contests for state or federal offices or referenda.

Municipalities will inherit:

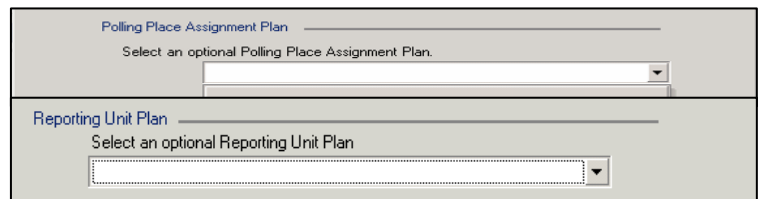
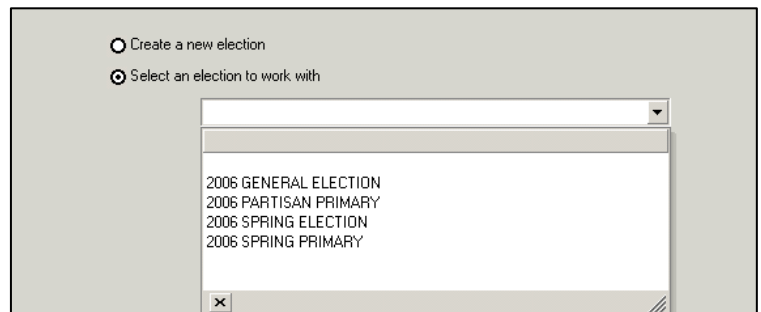
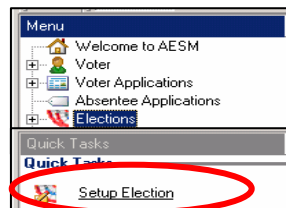
- Every election at which there is contest for a federal or state office, or a statewide referendum.
- Every election at which there is a contest for a County or School District office or referenda.

Municipalities will create:

- Every election at which there are only contests for municipal offices or referenda.

Inherit an Election

- Click the **Elections** node.
- Click the **Setup Election** Quick Task to open the **Election Setup Wizard**.
- Select the **Select an election to work with** option button.
- In the **Select an election to work with** box, click the name of the election you wish to inherit.
- Click **Next**.
- In the **Select an optional Polling Place Assignment Plan** box, click the name of the assignment plan you will use for the type of election you are inheriting. (Counties will not assign a Polling Place Assignment Plan.)
- In the **Select an optional Reporting Unit Plan** box, click the name of the plan you will use for the type of election you are inheriting. (Counties will not assign a Reporting Unit Plan.)
- Click **Next**.
- Click **Finish**.
 - By finishing the **Election Setup wizard**, you will be making this election available to work with, and will have automatically checked Milestone #1.



Create an Election

1. Click the **Elections** node on the Main Menu.
2. Click the **Setup Election** Quick Tasks to work within the **Election Setup Wizard**.
3. Click the **Create a new election** radio button.
4. Click **Next** to proceed to the **Election Basics** input screen.
5. Enter the following information:

Election Setup Wizard

Election Options
Choose whether you want to create a new election or add to one that has already been set up

☒ Create a new election

☐ Select an election to work with

- **Date:** Date of election.
- **Description:** Name the election. Please start the **Description** with the year and describe the election type.
- **Election Mode:** Leave as **Advanced**.
- **Time of Poll Open:** 7:00 AM
- **Time of Poll Close:** 8:00 PM
- **Last Date for Absent. Issue:** One day after the election date.
- **Registration Close Date:** Set to 20 days before the election date.
- **Effective Registration Date:** Set to 20 days before the election date.
- **Voter Age Eligibility Date:** Leave defaulted to the election date.

Election Setup Wizard

Election Basics
Enter a description, date, and other basic information.

Election For: TOWN OF BLOOMING GROVE Date: 10/3/2006

Description: 2006 BLOOMING GROVE SPECIAL ELECTION

Election Mode: Advanced Time Polls Open: 07:00:00 AM Time Polls Close: 08:00:00 PM Last Date for Absent. Issue: 10/3/2006

Voter Eligibility

Registration Close Date: 10/3/2006 Effective Registration Date: 10/3/2006 Voter Age Eligibility Date: 10/3/2006 Voter Minimum Age: 18

Advanced Election Details

☐ Run Off For:
☐ Property Owner Election ☐ All Mail-Ballot Election

Help < Back Next > Cancel



The **Registration Close Date** and **Effective Registration Date** must be set to 20 days before election day when you print poll lists, or you will not have any names appear on your supplemental poll list. **After you print poll lists, you must change the Registration Close Date and Effective Registration Date to the election date or you will not be able to enter Election Day Registrations.** To change these dates:

1. Click the **Elections** node.
2. Click on the name of the election in the data grid.
3. Click the **Change Election Setup** quick task to open the **Election Setup Wizard**.
4. In the **Election Setup Wizard**, click **Next**.
5. Change the **Registration Close Date** and **Effective Registration Date** to the date of the election.
6. Click **Next**.
7. Click **Next**.
8. Click **Finish**.

6. Click the **Next** button to proceed to the **Election Detail** input screen.

7. In the **Election Type** box, select the type of election you wish to create – usually **Special Election** or **Special Primary**.

8. In the **Highest Government Level** box, select the highest level with a contest on the ballot for that election.

- Contests for school district offices and referenda are at the **County** level.

9. Select the **Polling Place Assignment Plan** and **Reporting Unit Plan** if setting up at municipal level. Do not select if setting up at county level.

10. Click **Next**.

11. On the **Participating Jurisdictions** screen:

- You may leave the **Automatically determine...** option button selected if there are any contests for elected office at that election.
- Use the **These selected Jurisdictions** button to select a jurisdiction. For example, if you have a special election for a municipal referendum, you would select this button, and then the correct municipality.
- Use the **These selected Districts** button to select a district. For example, if you have a special school district referendum, you would select this button, and then the correct school district.

12. Click **Next**.

13. Type a name in the **Short Nickname for Election** box.
14. Click **Next**.
15. Click **Finish**.
 - By finishing the **Election Setup wizard**, you will be making this election available to work with, and will have automatically checked Milestone #1.



You can edit Election Set Up information by:

- Highlighting the election in the Main Menu tree.
- Clicking the **Change Election Setup** quick task.

Check Milestone #2 - Activate the Election



You must check the second milestone - Election Active - for an election before adding any contests or candidates to it.

1. Click the **Elections** node.
2. In the data grid, double-click the row containing the name of the election for which you wish to set Milestone #2.

Election Description	Date	Type	Election Status	Date CL
2006 GENERAL ELECTION	11/7/2006	General Election	Active	
2006 PARTISAN PRIMARY	9/12/2006	September Partisan P...	Closed	
2006 SPRING ELECTION	4/4/2006	Spring Election	Closed	
04/05/2005 ELECTION	4/5/2005	Special Election	Closed	12/31/2005
02/15/2005 ELECTION	2/15/2005	Special Election	Closed	12/31/2005

3. In the **Election – Update window**, 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

Milestones

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

Completed	Election Milestone	Description	Completed...	Completed...
<input checked="" type="checkbox"/>	Election Setup	Basic Election Setup complete; Election is scheduled	4/19/2006	State
<input checked="" type="checkbox"/>	Election Active	Election Cycle has begun		
<input type="checkbox"/>	Ballot Setup Finalized	All Contests are setup; Ballot Style can be generated		
<input type="checkbox"/>	Ballot Styles Finalized	Specifies that ballot styles have been created		
<input 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.		
<input type="checkbox"/>	Election Day Closed	Election Day has passed but all history not yet recorded.		
<input type="checkbox"/>	Election Finalized	All election tasks are completed; election is closed		

4. In the row reading **Election Active** in the **Election Milestone Column**, select the checkbox in the **Completed** column.
5. Click the **Save and Close** button to save the changes.

Contests



A contest is either a race for elected office or a referendum. Every election must have at least one contest – otherwise, there would be no point! To manage an election in SVRS, you must tell the system which contests there are for that election. SVRS uses the contest information you enter to determine ballot styles, absentee eligibility, and to populate sample ballots on the Voter Public Access (VPA) website.

GAB creates contests for:

- State and federal offices.
- Statewide referenda.

Counties create Contests for:

- County, school district, and technical college offices.
- County, school district, and technical college referenda.

Municipalities create Contests for:

- Municipal offices.
- Municipal referenda.

Jurisdictions may share responsibility for:

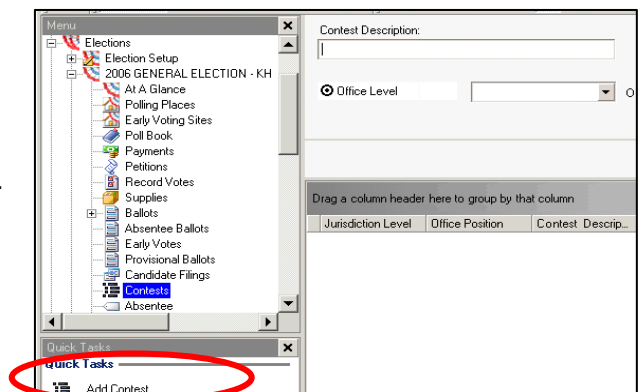
- Sanitary District, Lake Management District, and Multi-Jurisdictional Judge district contests that occur in multiple municipalities.

Add a Contest for Elected Office

1. Expand (+) the **Election** node.
2. Expand (+) the **Election** to which you wish to add contests.
3. Click the **Contests** node.



If you inherited this election, you may see contests already entered by other (state or county) jurisdictions in the data grid.

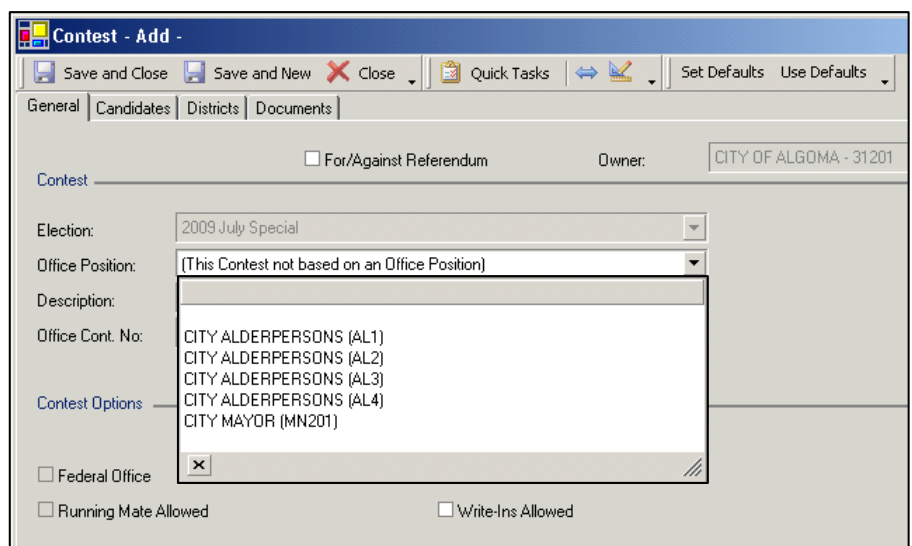


4. Click the **Add Contest** Quick Task.

5. In the **Office Position** box, click the selection for the office type to be elected.



The selections in the **Office Positions** box are determined by the **Office Types** you have created. If you are not seeing a selection for a particular office, see the [Districts & Offices](#) chapter for instructions on creating a new **Office Type**.



6. The **Description** box will default to the selection you made in the **Office Position** box.

Office Position:	COUNTY CLERK (C013)
Description:	COUNTY CLERK (C013)

- If this contest is for an office with numbered seats that are elected at-large, enter the seat number in the **Description** box.

Office Position:	BOARD MEMBER (MADISON)
Description:	BOARD MEMBER (MADISON) - TYPE SEAT NUMBER HERE

- For example, numbered School District seats that every voter in the district votes for.

- If this contest is for a Partisan Primary election, type in the name of the political party in the **Description** box.


Office Position:	BOARD OF DIRECTORS (8)
Description:	BOARD OF DIRECTORS - TYPE PRIMARY PARTY HERE

- Remember your **Contest Description** will appear in the sample ballot available on the **Voter Public Access** website. You may choose to add something like "Vote for one," or "Vote for not more than three," as appropriate.

7. Leave the **Official Contest No** box blank.

8. In the **Ballot Position** box, enter a number corresponding to that contest's place on the ballot.

Office Cont. No:		Ballot Position:	6
------------------	--	------------------	---

 *Ballot position numbers should increase from lowest to highest for: state level offices, county level offices, municipal offices, school district offices, special district offices, statewide referenda, countywide referenda, municipal referenda, school district referenda, and special district referenda. The GAB has assigned a range of ballot position numbers for each of those contest types. When you assign the ballot position for your contest, you will pick a number from that range. (See below)*

Office Contests Numbering Scheme for Ballot Positions in SVRS:

State:	1000 - 4999
County:	5000 - 5999
Municipality:	6000 - 6999
School District:	7000 - 7999
Special District:	8000 - 8999

Referenda Numbering Scheme for Ballot Positions in SVRS:

State:	9100 - 9199
County:	9200 - 9299
Municipality:	9300 - 9399
School District:	9400 - 9499
Special District:	9500 - 9599

9. In the **Party** box, select **Non-Partisan**.

Party:	Non-Partisan	No of Seats:	1
--------	--------------	--------------	---

10. In the **No of Seats** box, enter the number of seats for that contest.

- This will always be 1 unless the ballot reads *Vote for not more than X*. In that case, enter whatever X is.

11. Click **Save and Close**.

Add a Contest for a Referendum

1. Expand (+) the **Election** node.
2. Expand (+) the election to which you wish to add a contest.
3. Click the **Contests** node.
4. Click the **Add Contest** Quick Task.
5. Select the **For/Against Referendum** checkbox.
6. In the **Description** box, type a short description of the referendum.
7. Leave the **Party** box set to Non-Partisan.
8. Leave the **Official Contest No** box blank.
9. In the **Ballot Position** box, enter a number corresponding to that referendum's place on the ballot.



*In statewide elections, the GAB will assign a range of **Ballot Position** numbers for referenda. Please see the note on **Ballot Positions** on the previous page.*

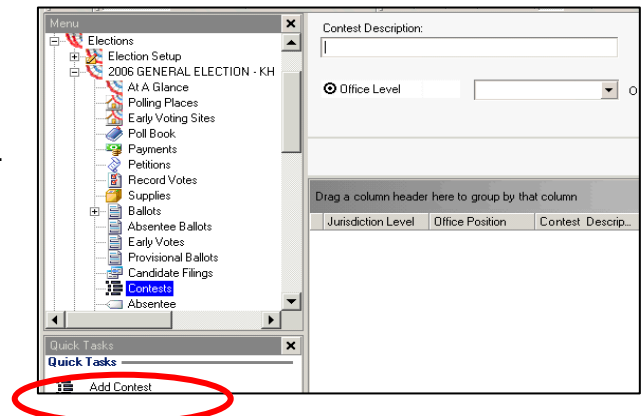
10. In the **Referendum Text** box, type the complete text of the referendum.

- Remember your **Referendum Description** and full text will appear in the sample ballot available on the **Voter Public Access** website.
- SVRS does not have spell check, so it is a good idea to enter the **Referendum Text** in a word document, and cut and paste it into SVRS.

11. If you are adding a referendum that is not Jurisdiction-wide (for a **school district**, **technical college district**, **lake management district**, or **sanitary district**):

- Click the **Districts** tab.
- Select the **These Selected Districts** option button.
- Expand (+) the district type that is having the referendum.
- Select the district which will vote on the referendum.

12. Click **Save and Close**.

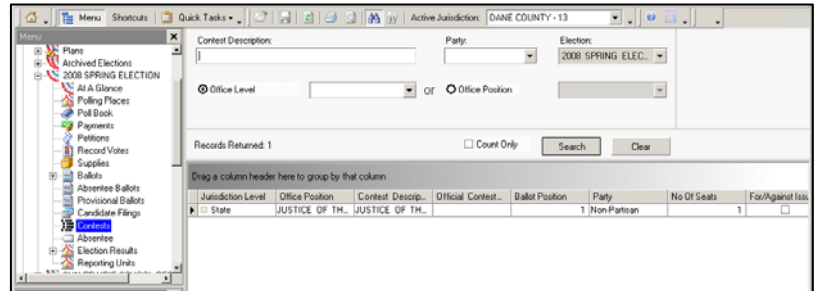


Search for and Update a Contest



If information changes or you made a mistake, you are able to revisit a contest record to make changes or updates.

1. Expand (+) the **Election** node.
2. Expand (+) the election the contest you wish to change.
3. Click the **Contests** node.
4. Contests which have been entered are displayed in the data grid.
5. Double-click on a record in the grid to open a **Contest** record.
6. Make changes to the record.
7. Click **Save and Close**.



Contest - Update - JUSTICE OF THE SUPREME COURT

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

General Candidates Districts Documents

☐ For/Against Referendum Owner: STATE OF WISCONSIN - WI

Contest

Election: 2008 SPRING ELECTION

Office Position: JUSTICE OF THE SUPREME COURT - 2008 - 2018

Description: JUSTICE OF THE SUPREME COURT

Office Cont. No: Jurisdiction Level: State

Ballot Position: 1

Contest Options

Party: Non-Partisan

No of Seats: 1

☐ Federal Office

☐ Running Mate Allowed

☐ Write-Ins Allowed

Remember that once you have checked Milestone #3, you will be unable to change **Contests** and **Candidates** for that election. You must uncheck Milestone #3, make any changes, and recheck the milestone. If you are a county level user, and you need to change a contest or candidate, every municipality in your county must uncheck Milestone #3 before you can uncheck it at the county level.

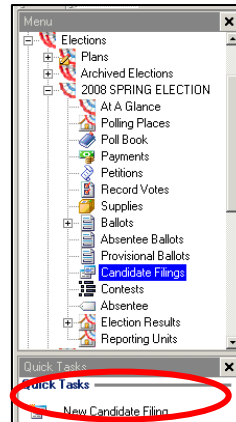
Candidate Filings




Before adding and approving a Candidate Filing for an election, you must have successfully set up the contest for which the candidate is filing and have a Contact Record for the candidate that is viewable to the jurisdiction adding that candidate. See the [Contacts](#) chapter for more information.

Add a Candidate Filing

1. Expand (+) the **Elections** node.
2. Expand (+) the election to which you wish to add a candidate filing.
3. Click the **Candidate Filings** node.
4. Click the **New Candidate Filing** Quick Task to open the **CandidateFiling – Add** window.



5. Click the **Address Book Icon**  to the right of the **Candidate** box to open the **Contact Search** window.
6. In the **Last name** box of the **Contact Search** window, type the candidate's last name.
7. In the **First Name** box of the **Contact Search** window, type the candidate's first name.
8. Click **Search**.
9. If the search results include the candidate's **Contact** record, double-click on that row in the data grid.

Candidate:

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

Drag a column header here to group by that column

Owner	Name	Address	Residential City/State/ZIP Code
TOWN OF POR...	HANSEN, BARBARA JEAN	82580 WHITE BIRCH RD	PORT WING, WI 54865
CITY OF GREE...	HANSEN, BARBARA A	506 MACCAUX DR	GREEN BAY, WI 543020000
CITY OF GREE...	HANSEN, BARBARA	1215 TENTH AVE	GREEN BAY, WI 543040000
TOWN OF MILT...	HANSEN, BARBARA A	W887 LOWER EAGLE VALLEY RD	FOUNTAIN CITY, WI 546297717
CITY OF OWEN...	HANSEN, BARBARA ANN	W5355 COUNTY ROAD X	WITHEE, WI 544988679
TOWN OF LODI...	HANSEN, BARBARA ANN	W10952 EAGLE DR	LODI, WI 53555
VILLAGE OF DE...	HANSEN, BARBARA A	616 W MOHAWK TRL	DE FOREST, WI 53532
CITY OF SUN P...	HANSEN, BARBARA K	412 HARVEST LN	SUN PRAIRIE, WI 53590
TOWN OF WAS...	HANSEN, BARBARA J.	1292 EASTSIDE RD	WASHINGTON ISL, WI 54246
CITY OF FOND...	HANSEN, BARBARA A	39 W BANK ST	FOND DU LAC, WI 549352328
TOWN OF CADL...	HANSEN, BARBARA J	W8425 PILZ RD	BROWNTOWN, WI 53522




You can only use the **Contact Search** window to find a contact record that is “viewable” to your **Active Jurisdiction**. If the search results do not include the candidate's **Contact** record, close [x] the **Contact Search** window. You will need to create a new **Contact** record, or open the **Contact** record in its owning municipality and change the record to be viewable at the county or state level. See the [Contacts](#) chapter of this manual for more information on creating or editing **Contact** records.

10. In the **Contest** box, click on the contest in which the candidate is running.

CandidateFiling - Add

Candidate Filing | Other | Activity | Documents

Candidate Detail

Candidate: 

Election:

Contest:

Party: Official Cand No:

Ballot Position: WSEB ID #:

11. You will only change the **Party** if you are setting up a candidate for the September or November Election. Please check the **Contact** record for the candidate to make sure the **Party** is listed correctly there.

12. The **Official Cand. No.** is used rarely, usually only for statewide candidates.

13. In the **Ballot Position** box, type a number corresponding to the candidate's position on the ballot for that contest, as determined by random draw.

14. In the **Status-Reason** list box, click the appropriate value for this candidate.

- If the candidate is an approved candidate, choose the status of **Approved-Approved**.

15. The **Filed On** and **Date Status Changed** fields do not have to reflect the true filing periods for the candidate. You can leave the defaulted dates. The **Filing Receipt No.**, **Election Results**, and **Date Withdrawn** will not be used.

16. Make sure the **Name on Ballot** reflects the name the candidate would like to appear on the ballot.

17. If you set up the **Office Type** to require a petition, the **Nom. Papers** and **Nom. Paper Status** fields will be editable. If the candidate gathered enough signatures, you will select **Approved** in the **Nom. Paper Status** field.

18. Check the **Filing Checklist** field to make sure that any criteria have been completed.

19. Click **Save and Close**.

Search for and Update a Candidate Filing



You can search for and update a candidate filing. Perhaps you noticed a name misspelling and need to correct the spelling.

1. Expand (+) the **Elections** node.
2. Expand (+) the current election.
3. Click the **Candidate Filings** node.
4. On the search pane, enter search criteria and click **Search**.
5. In the data grid, double-click on the row for the candidate record you wish to update.
6. Make changes to the **CandidateFiling** record.
7. Click the **Save and Close** button.

Remember that once you have checked Milestone #3, you will be unable to change **Contests** and **Candidates** for that election. You must uncheck Milestone #3, make any changes, and recheck the milestone. If you are a county level user, and you need to change a contest or candidate, every municipality in your county must uncheck Milestone #3 before you can uncheck it at the county level.

The screenshot displays the SMS software interface. The top window, titled 'ALSM', shows a search results table with columns: Candidate Name, Contest Description, Party, Filed On, Filing Status Code, and Filing Status. The first row is highlighted: HANSEN, BARBARA JEAN, JUSTICE OF THE SUPRE, Non-Partisan, 11/8/2007, Approved, Approved.

The bottom window, titled 'CandidateFiling - Update - Filing #70016539', shows the details for this filing. It includes fields for Candidate (HANSEN, BARBARA JEAN), Election (2008 SPRING ELECTION), Contest (JUSTICE OF THE SUPREME COURT), Party (Non-Partisan), and Ballot Position (0). It also shows filing details such as Status-Reason (Approved - Approved), Filed On (11/8/2007), and Filing Receipt No. (2008SPREL-1).

Check Milestone #3 - Ballot Setup Finalized



Checking Milestone #3 for an election indicates that you have added all of your jurisdiction's Contests and Candidates. Once checked, you will not be able to change contests or candidates within the election without first unchecking Milestone #3.

In an election created by the State:

- Counties cannot check Milestone #3 until the state checks it.
- Counties cannot uncheck Milestone #3 until it is unchecked by all municipalities in the county.
- Municipalities cannot check Milestone #3 until it is checked by their county or counties.
- Municipalities can uncheck Milestone #3 at any time

In an election created by a County:

- Municipalities cannot check Milestone #3 until it is checked by the county.
- The county cannot uncheck Milestone #3 until it is unchecked by all municipalities in the county.

In an election created by a municipality:

- The creating municipality can check and uncheck Milestone #3 at any time.

- Click the **Elections** node.
- In the data grid, double-click the row of the election for which you wish to check Milestone #3.

Election Description	Date	Type	Election Status	Date CL
2006 GENERAL ELECTION	11/7/2006	General Election	Active	
2006 PARTISAN PRIMARY	9/12/2006	September Partisan P...	Closed	
2006 SPRING ELECTION	4/4/2006	Spring Election	Closed	
04/05/2005 ELECTION	4/5/2005	Special Election	Closed	12/31/2005
02/15/2005 ELECTION	2/15/2005	Special Election	Closed	12/31/2005

- In the **Election – Update** window, click the **Events** tab.
- In the row reading **Ballot Setup Finalized** in the **Election Milestone Column**, select the checkbox in the **Completed** column.

Election **Events** **Districts** **Documents**

Milestones

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

Completed	Election Milestone	Description	Completed...	Completed...
<input checked="" type="checkbox"/>	Election Setup	Basic Election Setup complete; Election is scheduled	9/13/2007	hanseb
<input checked="" type="checkbox"/>	Election Active	Election Cycle has begun	9/13/2007	hanseb
<input checked="" type="checkbox"/>	Ballot Setup Finalized	All Contests are setup; Ballot Style can be generated		
<input type="checkbox"/>	Ballot Styles Finalized	Specifies that ballot styles have been created		
<input 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.		
<input type="checkbox"/>	Election Day Closed	Election Day has passed but all history not yet recorded.		
<input type="checkbox"/>	Election Finalized	All election tasks are completed; election is closed		

- Click **Save and Close**.

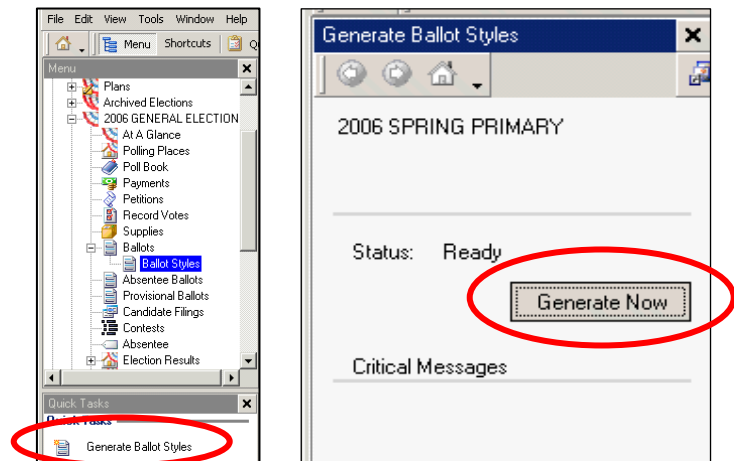
Generate Ballot Styles



Ballot Style refers to the unique set of Contests and Candidates that will appear on a given voter's ballot. All voters with this exact same set of Contests and Candidates will have the same Ballot Style in SVRS. Two voters whose ballots differ by even one Contest will therefore require different Ballot Styles.

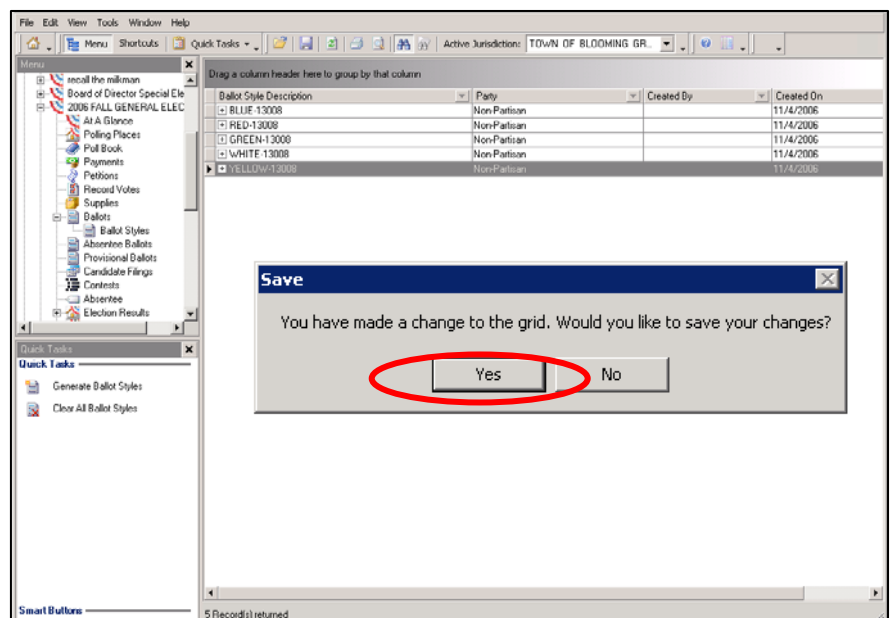
In SVRS, ballot styles are generated at the municipal level, regardless of whether that municipality has added any contests to the election. If a municipality does not generate ballot styles, the poll books printed for that election will not contain the names of any voters. Municipalities cannot generate ballot styles without first checking Milestone #3.

1. Expand (+) the **Elections** node.
2. Expand (+) the current election.
3. Expand (+) the **Ballots** node.
4. Click on the **Ballot Styles** node.
5. Click the **Generate Ballot Styles** Quick Task to open the **Generate Ballot Styles** pane.
6. If Milestones #1, #2, and #3 are checked, the **Status** will be **Ready**. Click **Generate Now**.



If the **Status** is not **Ready** read the **Critical Messages** and take the appropriate steps. Usually this will mean making sure Milestone #3 is checked and Milestone #4 is not checked.

7. Within a few moments, line(s) of ballot style descriptions will appear in the data grid. Each line on the grid represents a unique combination of contests and referenda.
8. Expand (+) each ballot style on the data. Verify that:
 - You have the correct number of ballot styles.
 - Each ballot style has the correct contests and candidates listed.



SVRS assigns a description (**NP-1**, **NP-2**, **NP-3**, etc.) to each ballot style. You can change this description by typing directly in the data grid. You cannot use a description that has been used before by yourself or any other user in the state. GAB suggests using a descriptive term followed by the HINDI number and election date, e.g. **"BLUE-0200 -110706"** or **"SPVSR1-02002-040709."** Put important information (like the color or ballot information) first, because the information at the end may be cut off on the poll list. After changing the description and clicking on a different node, you may get the message, **"You have made a change to the grid. Would you like to save your changes?"** Click **Yes**. The description prints on the poll book and can be helpful to the poll workers.

Check Milestone #4 - Ballot Styles Finalized



Checking Milestone #4 at the municipal level signifies that you have generated and double-checked your ballot styles, and are ready to generate absentee ballots and poll books.

Counties cannot check Milestone #4 until all municipalities in the county also have it checked. Counties should not check Milestone #4 until after an election, in order to allow municipalities greater flexibility in changing contests, candidates and ballot styles.

1. Click the **Elections** node.
2. In the data grid, double-click the row of the election for which you wish to check Milestone #4.

Election Description	Date	Type	Election Status	Date CL
2006 GENERAL ELECTION	11/7/2006	General Election	Active	
2006 PARTISAN PRIMARY	9/12/2006	September Partisan P...	Closed	
2006 SPRING ELECTION	4/4/2006	Spring Election	Closed	
04/05/2005 ELECTION	4/5/2005	Special Election	Closed	12/31/2005
02/15/2005 ELECTION	2/15/2005	Special Election	Closed	12/31/2005

3. In the **Election – Update** window, click the **Events** tab.
4. In the row reading **Ballot Styles Finalized** in the **Election Milestone Column**, select the check box in the **Completed** column.

Election - Update | **Events** | Districts | Documents

Milestones

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

Completed	Election Milestone	Description	Completed...	Completed...
<input checked="" type="checkbox"/>	Election Setup	Basic Election Setup complete; Election is scheduled	9/13/2007	hanseb
<input checked="" type="checkbox"/>	Election Active	Election Cycle has begun	9/13/2007	hanseb
<input checked="" type="checkbox"/>	Ballot Setup Finalized	All Contests are setup; Ballot Style can be generated	11/8/2007	pederr
<input checked="" type="checkbox"/>	Ballot Styles Finalized	Specifies that ballot styles have been created		
<input 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.		
<input type="checkbox"/>	Election Day Closed	Election Day has passed but all history not yet recorded.		
<input type="checkbox"/>	Election Finalized	All election tasks are completed; election is closed		

5. Click **Save and Close**.