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Managing the Absentee Voting Process

Five Principal Steps to Managing an Absentee Voter's Record

1) Adding the absentee application (GAB-121).
2) Issuing an absentee ballot (generating or printing a label) and updating the ballot sent date if necessary.
3) Recording a ballot as returned (or not returned)
4) Use the poll book to record a vote cast by an absentee voter.
5) Post Election cleanup: Cancelling unreturned ballots; Adjusting Permanent Absentee Applications.

Step 1 and Adjusting Permanent Absentee Applications are covered in the <u>Absentee Applications</u> chapter. Steps 2 and 3 and Cancelling Unreturned Ballots are covered in this chapter, under <u>Absentee Ballots</u>. Step 4 is covered under <u>Recording Votes</u> in the <u>Post Election Activities</u> chapter.

The following is a simple chart depicting at what time during an election cycle you may do any of the above:

Absentee Process Steps in the Election Cycle	**Before Election Cycle Begins** (before election is inherited or set-up)	**Election Cycle Begins**- Before Ballot Styles are Generated (up through Milestone #3)	**During Election Cycle**- After Ballot Styles are Generated* (Milestone #4 up through sending first batch of ballots)	**Late Election Cycle** (after first batch of absentees has been sent, up through Election Day)	**Post-Election** (after election until closed)
Add Absentee Applications	✓	✓	✓	✓	**Not for this election**
Issue Ballots and Generate Labels			✓ (issue ballots as a group/batch)	✓ (issuing ballots in batches & individually)	
Record Returned Ballots (Mailings)				✓	
Record Vote					✓
Post Election Cleanup					✓

*<u>Important Note:</u> You cannot issue absentee ballots or print labels before you have checked Milestone#4 for an election. Checking Milestone#4 signifies all contests and candidates have been added to SVRS and that you have generated ballot styles.   Please verify this information before checking Milestone #4. See chart above. For more information on where the absentee process falls within an election, see <u>Appendix B</u> for the <u>SVRS Election Events Checklist.</u>

Issuing Absentee Ballots

☑ While you may add absentee applications at any time, you may not begin issuing absentee ballots until all contests and candidates have been entered, Ballot Styles have been generated, and Milestone #4 has been checked. See the Election Setup chapter for more information on these steps.

When absentee voters are issued a ballot in SVRS, it updates the Ballot Sent Date on the WI Absentee Application Ballot Log and creates an "Absentee" watermark next to the elector's name on the poll book. Issuing a ballot also creates an Absentee Ballot Mailing Label. You will print these labels and affix them to the absentee envelopes. If they are returned through the mail or in your office, you will record them as returned, which will update your WI Absentee Application Ballot Log with the return date.

Absentee mailing labels can be generated either as a batch or individually. SVRS will print two labels for each absentee ballot. One label is for the envelope mailed to the voter and the other is for the returned certificate envelope. Whether you should print labels individually or as a batch depends on when you print and how you intend to use the label.

By the time you are able to send out absentee ballots, you may have a sizeable number of absentee applications for that election. You will want to issue ballot labels in one or more large batches. Once you have mailed out the first large batch(es), you will begin to receive absentee applications from people coming to vote absentee in your office, and occasional requests by mail. You may choose to generate these later ballot labels in daily batches, or individually on a small label printer.

Issue Absentee Ballots and Generate Absentee Labels as a Batch

💡 *Before you issue ballot labels, you make sure all of your absentee applications are entered, and you should go through the Absentee Applications Data Quality Items checklist and fix any problems you find. See that section in the Absentee Applications chapter.*

1. Within the election, select the **Absentee** node.

2. Select the Quick Task **Send Ballots to Voters with Approved Applications**.

3. The **Absentees For Approved Apps** pane replaces the Main Menu tree. If no filter is created, labels will be generated for all approved applications.

💡 *Unless you have a very small number of absentee ballots to send out, you will want to divide up your absentees into several groups. The instructions on filtering that follow will help you do that. If you wish to print all of your labels in one large batch, skip to **Step 5**.*

Suggested Filters for Batching Absentee Labels

*Before you issue each of the batches described below, you may find it helpful to use the **Absentee** search screen within the election. For example, you can search for **Approved Military** Applications and check the **Count Only** check box before clicking **Search**. If there are 52 **Approved Military** Applications, and you generate a batch of **Military** labels, you should receive 52 labels. SVRS will tell you how many ballot labels were generated, and if any failed to generate, when it creates the ballot labels. If you want to issue your ballots in one big batch, get a count of all **Approved** Applications, and do not use a filter. Compare the number of ballot labels issued to the count of all **Approved** Applications.*

*If you have saved the Filters below, you don't have to recreate them for each election. Instead, you can select them from the **Filter** drop down list. See the Reports chapter for directions on saving a filter.*

4. **Filter** your Batch of Absentee Labels:

    a. For **Military** Absentees:

        i. Click the **Custom** button next to the **Filter for Approved Absentees** drop down list.

        ii. Copy the filter displayed. This filter will generate labels for all of your **Military** absentees as a group.

        iii. Click **Use Filter**.

        iv. Continue with **Steps 5-10**.

b. For **Overseas** Absentees (you will only do this for Federal Elections):

    i. Click the **Custom** button next to the **Filter for Approved Absentees** drop down list.

Filter for Approved Absentees

[Select Filter] ▼ Custom

    ii. Copy the filter displayed. This filter will generate labels for all of your **Overseas** absentees as a group. Remember that these voters will receive a special ballot listing only Federal Offices.

    iii. Click **Use Filter**.

    iv. Continue with **Steps 5-10**.

*Remember that **Military** and **Overseas Absentee** voters must be sent a **write-in only ballot** 90 days before Election Day. SVRS is unable to produce labels for these ballots, because Milestone #4 will not be checked at that time. You will need to use some other system to record that **Military** and **Overseas** write-in only ballots are sent and received.*

c. For **Nursing Home** Absentees:

    i. Click the **Custom** button next to the **Filter for Approved Absentees** drop down list.

Filter for Approved Absentees

[Select Filter] ▼ Custom

    ii. Copy the filter displayed. This filter will generate labels for all of your **Nursing Home** absentees as a group, regardless of whether they have **Permanent** or **Regular** absentee applications. Please note that for this filter to work, all of these applications must have **Nursing Home** entered in the **Vote Location** field.
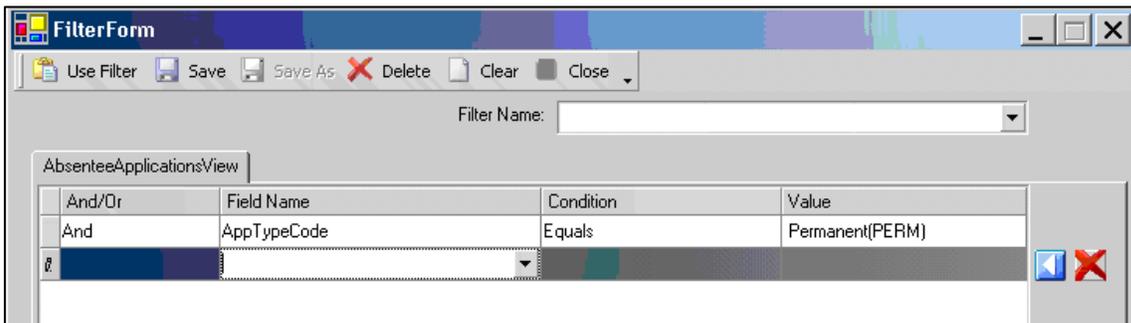

    iii. Click **Use Filter**.

    iv. Continue with **Steps 5-10**.

d. For **Permanent** Absentees:

    i. Click the **Custom** button next to the **Filter for Approved Absentees** drop down list.

    ii. Copy the filter displayed. This filter will generate labels for all of your **Permanent** absentees as a group. If you have already issued your **Nursing Home** absentees, make sure the **Cancel Outstanding Ballots** checkbox is **unchecked**. Any applications that have already had a ballot issued will be ignored, meaning only your non-Nursing Home **Permanent** absentees will be included in this batch.

    iii. Click **Use Filter**

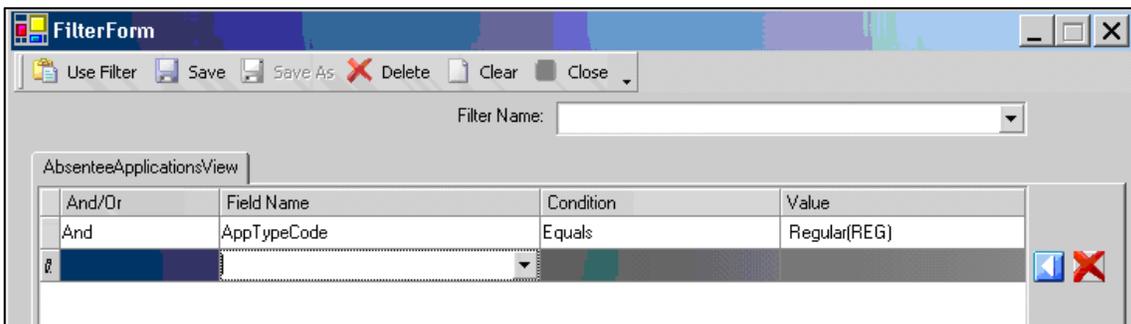   iv. Continue with **Steps 5-10**.

*If you want to issue your **Nursing Home** absentee ballot labels after your other **Permanent** absentees, you can add a second line to the filter above: **And; VoteLocationCode; DoesNotEqual; Nursing Home (NURS).** This will prevent applications with a **Vote Location** of **Nursing Home** from being issued a ballot label. If there are any **Nursing Home** absentees with **Regular** applications, you should also add this line to the filter below. ..*

e. For **Regular** absentees:

    i. Click the **Custom** button next to the **Filter for Approved Absentees** drop down list.
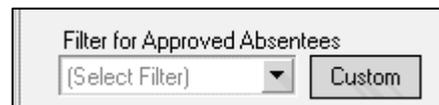
    ii. Copy the filter displayed. This filter will generate labels for all of your **Regular** absentees as a group. included in this batch.

    iii. Click **Use Filter**.

    iv. Continue with **Steps 5-10**.

Sorting, Setting Printer Settings, and Generating Batches

5. **Sort** your Batch of Absentee Labels:

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

    b. Copy the **Sort** displayed. This will put your labels in order by Ward, then the alphabetically by voters' names. If you have multiple ballot styles, this will help you group together absentee voters with the same **Ballot Style**.

    c. Click **Use Sort**.

6. In the **Mailing to Send** drop down list, select **WI Absentee Ballot Label 2x5.** This will print 2 labels for a voter in each row, and there will be 5 voters per sheet.

7. **Uncheck the Cancel Outstanding Ballots checkbox**. As long as this is unchecked, SVRS will not issue ballots to an application that has already had a ballot issued. This prevents you from issuing duplicate ballots because of an incorrect filter. **You should almost always uncheck this box**.
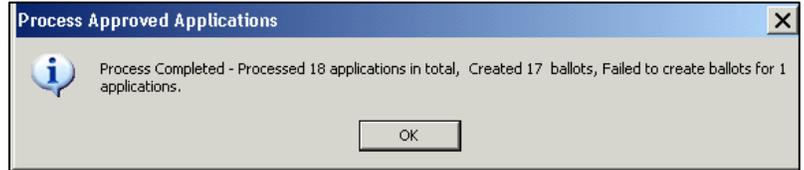
*If the **Cancel Outstanding Ballots** checkbox is checked, SVRS will cancel any previously issued ballot that is caught in your current filter and generate new ballot records, **Mailing IDs** and labels for these voters. In rare cases, you may wish to do this because your mailing was not generated properly and you need to cancel those ballots as a group and issue new ballots to those voters. However, you should use caution when doing this. Calling your SVRS Specialist or the GAB Help Desk before you do this is a good idea. .*

8. Click the **Printer Settings** button. The **Print** dialog box will appear.

9. Verify that the printer selected is correct and click **Save Settings**.

*You may also choose to **Export** your batch of labels. See the Poll Books chapter or the Reports chapter for directions on exporting a file. Make sure if you export your ballot labels to a file, the **Render Format** is **PDF**. This ensures your barcodes will be readable, so you can scan ballots in as returned.*

10. Click **Process.** This will issue absentee ballots and generate absentee mailing labels for your voters with approved applications. This may take several minutes, depending on the number of absentee applications you are processing. When done, SVRS will display a message confirming how many ballots were generated and how many failed to generate, if any.

Process Approved Applications

Process Completed - Processed 18 applications in total, Created 17 ballots, Failed to create ballots for 1 applications.

OK

11. Repeat **Steps 1-10** for any additional batches of labels.

To find the applications that failed to create ballots, search within the election under the Absentee node. Narrow your search to match the batch of ballots you just issued. You will see a number of application records appear in the search grid. Every application that was issued a ballot will have a white box with black plus symbol in front of it. A grayed out plus symbol indicates a ballot has not been issued for that application. If you find an application with a gray plus, double-click to open the application and check the Voter Status Reason and Address. Occasionally a voter will not receive a ballot label because they have been cancelled, inactivated, or moved. The voter should not receive a ballot, and the application should be cancelled.

General

Last Name:	First Name:	Middle Name:	Suffix:	Voter Reg Num:
Date of Birth:	Application Type: Permanent	Application Status:	Application Date:	
Voting Method:	Voting Location:			

Records Returned: 569   ☐ Count Only   Search   Clear

Drag a column header here to group by that column

Name △	Voter Reg Num	App Type	App Status	Date on App	Soc Sec Num
⊞ ACHTERBERG, FRED	0046969031	Permanent	Approved	2/27/2009	
⊞ ACHTERBERG, JANICE	0046969033	Permanent	Approved	2/27/2009	
⊞ ALBINGER, DIANNE	0046969107	Permanent	Approved	2/24/2009	
⊟ AL▸OTA, CHRISTOPHE…	0046969147	Permanent	Approved	2/24/2009	

	Election Descrip…	Ballot Type	Ballot Status	Ballot Status Re…	Date Ballot Gen…	Date Ballot Sent	D▸
▸	2009 SPRING E…	Normal	Issued	Not Returned	3/12/2009	3/12/2009	

Name	Voter Reg Num	App Type	App Status	Date on App	
⊞ ALLEN, GLEN P	0046969153	Permanent	Approved	2/27/2009	
⊞ ALLEN, MARLENE J	0046969159	Permanent	Cancelled	7/19/2006	
⊞ ALLEN, MARLENE J	0046969159	Permanent	Approved	2/27/2009	
⊞ ALVAREZ, MARLENE	0046969180	Permanent	Cancelled	7/19/2006	
⊞ ALVAREZ, MARLENE	0046969180	Permanent	Approved	2/27/2009	
⊞ APPLEGARTH, PAULA…	0046969276	Permanent	Cancelled	7/19/2006	
⊞ AVILA, ROSEL	0046969367	Permanent	Cancelled	7/19/2006	
⊞ AVILA, ROSEL	0046969367	Permanent	Approved	2/27/2009	

Although you have generated absentee ballots, they have not been printed. To print your ballot labels, you must follow the directions below.

*You can search for newly generated ballots in the **Absentee Ballots** search screen. For more information, see the Managing Absentee Ballots section below.*

# Retrieving and Printing Absentee Ballot Labels Generated as a Batch

After issuing absentee ballots and generating mailing labels, the next step is to retrieve and print the absentee labels from the batch in which they were created.

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1. Expand **(+)** the **Labels and Mailings node** on the Main Menu tree.

2. Click **Queued Batch Mailings.**

3. In the **Date Created** fields, enter the date on which the ballots were created under **From**. If you have generated other mailings on the same date, you may also search using the **Mailing Type** of **WI Absentee Ballot Labels 2X5**.

4. Click **Search**.
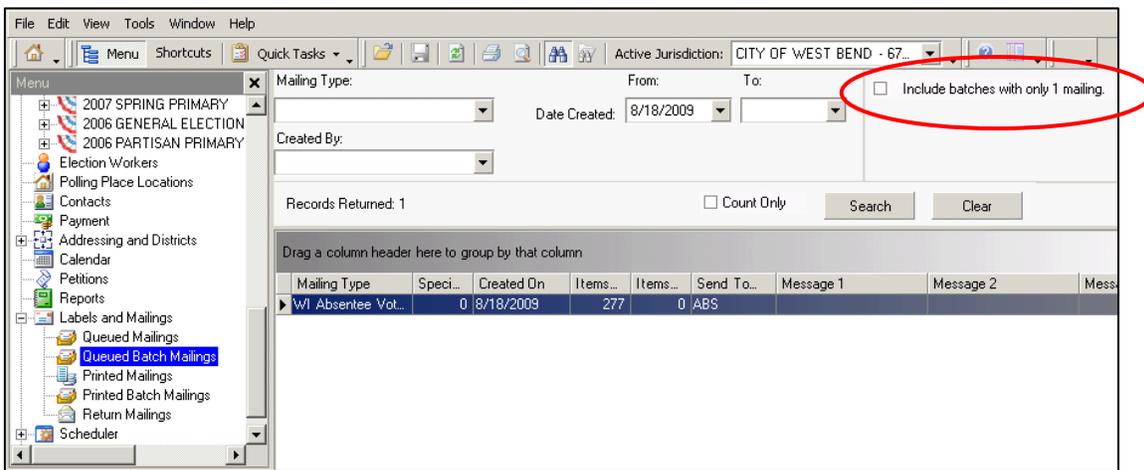
*If you have only generated a single label in a particular batch, you will have to click in the box "**Include batches with only 1 mailing**" before clicking on the **Search** button.*

5. Find the mailing in the data grid and click on it once to highlight. Ensure that it has the correct number of **Items** (this is the number of sets of labels).

6. Click the **Print Mailing(s)** Quick Task.

7. When asked whether the mailing has printed successfully, click **Yes**. By clicking **Yes**, the barcode is activated for that label. If you click **No**, you will not be able to record that absentee ballot as returned.

8. Repeat **Steps 3-7** for additional batches.
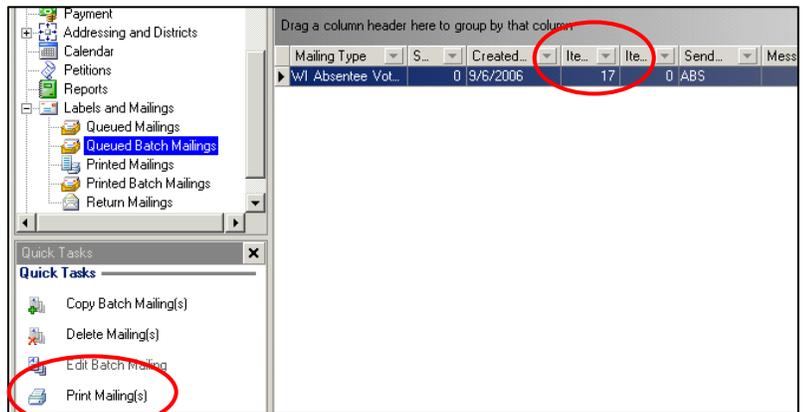
Printing the ballot labels makes them disappear from the ***Queued Batch Mailings*** *node and moves them to the* ***Printed Batch Mailings*** *node. If you want to reprint this batch of labels, you will have to expand the* ***Labels and Mailings*** *node and click on the* ***Printed Batch Mailings*** *node. Find the batch you want to reprint and choose the Quick Task* ***Reprint Mailing(s)***. *Reprinting updates the* ***Ballot Sent Date***.
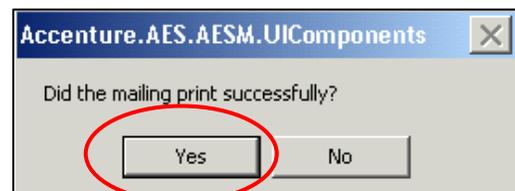
Issue Absentee Ballots in Daily Batches

✓ You must have contests and candidates entered, Ballot Styles generated, and Milestone #4 checked to begin issuing absentee ballot labels. After you generate your first big batch(es) of labels and have mailed them to voters, you will need to generate labels on an ongoing basis, either in daily batches, or individually using a label printer. This section covers daily batches, and the next section covers issuing and printing individual ballot labels.

*If you do not have an individual label printer or do not wish to use one, you can continue to use your sheet labels to print batches of absentee ballot labels on a daily or twice daily basis. To do this, simply put the **entry date** in the **Date on App** field in the absentee application. Choose a **Vote Location** of **Clerks Office**, **Via Mail**, **Via Email**, or **Via Fax**. If you wish to run one batch of labels for the morning, and another for the afternoon, enter **AM** or **PM** in the **Batch Name** field. When you process the application, leave the **Create an Application Only** checkbox **checked**, and leave the **Send Mailings** checkbox **unchecked**. When all of your applications have been entered, follow the directions below.*

*In order for the daily batching process to work, the **Clerks Office** (or walk-up) absentees must have the voter's name and address clearly handwritten on the return envelope. You can affix absentee ballot labels to these envelopes later if you wish. You may also leave the labels off of your **Clerks Office** absentees entirely, but you will still print absentee labels on paper in order to record those ballots as returned.*

1. Within the election, select the **Absentee** node.

2. Select the Quick Task **Send Ballots to Voters with Approved Applications**.

3. The **Absentees For Approved Apps** pane replaces the Main Menu tree.

4. **Filter** your Batch of Absentee Labels:

    a. For **Clerks Office** (walk up) absentees:

    Filter for Approved Absentees
    [(Select Filter) ▼] [Custom]

        i. Click **Custom** next to the **Filter for Approved Absentees** drop down list.

        ii. Copy the filter displayed. Replace the **Value** of the **Application Date** with the correct date in mm/dd/yyyy format. This filter will generate labels for all of the **Clerks Office** absentees entered on a single day. Optionally, if you entered **AM** or **PM** in the **Batch Name** on the application, add a third line of **And**; **BatchName**; **Equals**; **AM** (or **PM**).

FilterForm

Use Filter | Save | Save As | Delete | Clear | Close

Filter Name: [▼]

AbsenteeApplicationsView

And/Or	Field Name	Condition	Value
And	ApplicationDate	Equals	8/18/2009
And	VoteLocationCode	Equals	Clerks Office(CLRKOFF)

        iii. Click **Use Filter**.

    b. For **Via Mail**, **Via Email**, and **Via Fax** absentees:

    Filter for Approved Absentees
    [(Select Filter) ▼] [Custom]

        i. Click **Custom** next to the **Filter for Approved Absentees** drop down list.

        ii. Copy the filter displayed. Replace the **Value** of the **Application Date** with the correct date in mm/dd/yyyy format. This filter will generate labels for all applications entered on a single day that are not **Clerks Office** absentees. Optionally, if you entered **AM** or **PM** in the **Batch Name** on the application, add a third line of **And**; **BatchName**; **Equals**; **AM** (or **PM**).

FilterForm

Use Filter | Save | Save As | Delete | Clear | Close

Filter Name: [▼]

AbsenteeApplicationsView

And/Or	Field Name	Condition	Value
And	ApplicationDate	Equals	8/18/2009
And	VoteLocationCode	DoesNotEqual	Clerks Office(CLRKO...

        iii. Click **Use Filter**.

*This filter will not generate **Clerks Office** absentees. This filter may print **Nursing Home** labels entered that day, but those can be identified by the facility name in first line of the address. **Via Email** and **Via Fax** requests can be identified by the email address or fax number printed in the the **Absentee Address** portion of the label. All other labels are **Via Mail**, and need to be mailed to the voters.*

5. Follow the directions above for <u>Sorting, Setting Printer Settings, and Generating Batches</u>. **Remember to always <u>uncheck</u> the Cancel Outstanding Ballots checkbox** so you do not accidentally re-issue ballots for applications that already have a ballot.

6. Follow the directions above for <u>Retrieving and Printing Absentee Ballot Labels</u>. When you print your batches, you can choose to print your **Clerks Office** batch on labels and affix them to the proper envelopes. You may also choose to print the **Clerks Office** batch on plain paper to make it easier to record ballots as returned. You will print the other (mostly **Via Mail**) batch on mailing labels.

*After you have printed your daily batches, you can use the search screen in the **Absentee** node to verify that all of your applications have been issued ballots. Enter an **Application Status** of **Approved** and an **Application Date** in mm/dd/yyyy format, then **Search**. Make sure that each application has a **black and white plus sign**, meaning a ballot has been generated. A **gray plus sign** means no ballot was generated for that application, and you should investigate further.*

Issue and Print Individual Absentee Ballots

💡 *If you have an individual label printer, you can issue a ballot label at the same time you process a voter's absentee application. This is most useful when processing voters who vote absentee within your office, but may also be useful for **Overseas**, **Fax**, or **Email** requests that you want to handle on an individual basis. You may issue an individual ballot label from the main **Absentee Applications** node, the **Absentee** node within an election, or in the **Voter** node using the **Process Voter as an Absentee** Quick Task.*

From the Absentee Applications or Absentee nodes

1. Begin by following **Steps 1-13** in the <u>Adding an Absentee Application</u> section of the <u>Absentee Applications</u> chapter (pages 4-9). You may use either the **Absentee Applications** node or the **Absentee** node within an election.

2. Click **Quick Tasks**, then **Process Absentee Application**. You will see the **Process Absentee** pane.

3. Uncheck the **Create an Application Only** checkbox.

4. Select the **Application Status – Reason** of **Approved – Valid Application**.

5. Check the **Send Mailing** box.

💡 *Make sure that if the **Create an Application Only** checkbox is unchecked, the **Send Mailing** checkbox is checked. If both are unchecked, you will generate an absentee ballot, but have no mailing to print out. This means that you will have to cancel and reissue the ballot label.*

6. Select **WI Absentee Voter Label** to print just two labels to a DYMO Label printer.

7. Click the **Printer Settings** button. The **Print** dialog box will open.

8. Click the **Specific Printer** radio button and choose your DYMO printer from the drop down.

9. Click **Properties**.

10. Set the **Printer Settings** to match the screen to the right. **Paper Size** should be **30256 Shipping**; **Print Quality 300 X 300**; and **Orientation** should be **Landscape**.

11. Click **OK** and **Save Settings**. Once this information is saved, it will be the default setting anytime you choose to print **WI Absentee Voter Labels**.

Before you use your DYMO printer, you also have to make sure to set the Printer Settings outside of SVRS. See the Check Printer Settings section in the Getting Started chapter and follow the directions there. If you have further questions about DYMO setup, contact the GAB help desk.

12. Click the **Print Now** radio button.

13. Click **Process and Print**. The label may take 20 to 30 seconds to print on your DYMO.

14. You will receive a prompt asking if the mailing printed successfully. Click **Yes**.
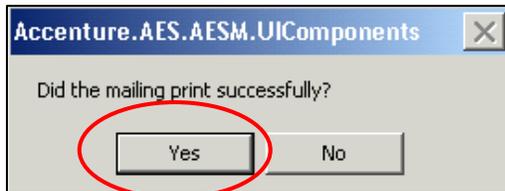
*To print one absentee label, instead of the set of two, from your DYMO LabelWriter, choose **WI Absentee Voter Labels 2X5** as the mailing type, but choose the DYMO LabelWriter as the printer. Remember, if you later issue a batch of absentee ballots that you want to print on sheet labels, you will have to change the **Printer Settings** for the **WI Absentee Voter Labels 2X5** back to a regular printer.*

From the Voter Node

You can create an absentee application and issue and print ballot labels directly from the **Voter** node. However, the **Voter** node does not allow you to enter the **Vote Location** (**Clerks Office** or **Via Mail**) or a **Batch Name**. For this reason, you will only want to use the **Voter** node to process individual absentee requests that are printed immediately to a DYMO printer. This will most often be used for walk-up absentees in the clerk's office.

1. Highlight the **Voter** node in the Main Menu tree.

2. Search for a specific voter.

3. Highlight the voter's record in the data grid.

4. Click the **Process as an Absentee** Quick Task.
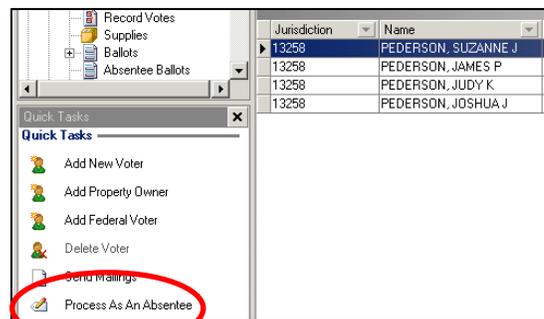
The **Process Voter as Absentee** pane appears:

5. Select the **Election**.

6. Enter the **Absentee Type** of **Regular.**

7. **Party** should be left as **Non-Partisan,** and **Reason** is not used in Wisconsin.
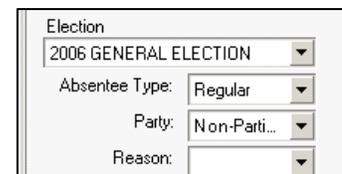
8. Enter a **Vote Method** of **Absentee**.

9. Leave the **Create Application Only** checkbox unchecked.

10. Under **Application Status – Reason**, select **Approved – Valid Application.**

11. Check the **Send Mailing** box.

12. Under **Mailing to Send**, select **WI Absentee Voter Label**, which is designed to print on a Dymo Label Writer.

13. If the voter provided an **Absentee Address** different from their residential address, click the **Use Different Addr** check box. An **Address** button will appear.

   a. Click the **Address** button. The **Address Detail** screen will appear. If the address is a US Mailing address, enter it in the space provided. Avoid using **Address Line 1b**.

   b. For foreign addresses, select **Unparsed** from the **Format** drop down list. Enter the mailing address, avoiding **Address Line 1b**.

14. Click the **Printer Settings** button. Verify that the DYMO printer settings are correct, as described in **Steps 6-10** in the previous section, and displayed below.

15. Click the **Print Now** radio button.

16. Click **Process**.

17. You will receive a prompt asking if the mailing printed successfully. Click **Yes**.

Examine your Absentee Ballot Labels.

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- *You will receive **two labels** for each absentee voter. The first label will display the **Residential Address** and can be placed on the return envelope. The second label is for the mailing envelope, and will contain the **Absentee Address** you have entered. If you did not enter an Absentee Address, the second label will display the **Mailing Address** from the **Voter Record**. If there is no Absentee Address or Mailing Address, the second label will display the **Residential Address**. If an absentee label displays nothing but a "WI," or has something else wrong, it may be because of an incorrect **Mailing Address** in the **Voter Record**. If you delete each field of the Mailing Address and regenerate your absentee label, the address may print correctly..*

- *The **Ballot Style** will be listed above the voter's name. You will use this ballot style or the listed ward to ensure the voter is given the correct ballot. For instructions on renaming the **Ballot Styles**, see the Election Setup chapter.*

- *The **Barcode** will be listed on the upper right. You will use this barcode to scan in the ballot as returned. The **Mailing ID number** is listed immediately below the barcode, and can be used to manually record the ballot as returned if there is a problem with scanning the barcode.*

- *If **ID Required** is listed on the upper right, the voter was a first-time registrant by mail, and did not supply the required **Proof of Residence**. You must send the voter notice to provide that **Proof of Residence** when they return their ballot. (It must be enclosed in the outer envelope, not the inside envelope with the ballot.) If the voter returns the ballot but does not provide the required proof, their ballot will become a provisional ballot and may not be counted unless they provide the required information to the clerk by 4pm the day following Election Day.*

- *The **Voter Registration Number** is displayed on the right side of each label underneath the Barcode and Mailing ID number.*

- *If there was a problem generating the mailing, or you did not hit **Yes** to confirm it was printed successfully, the **Barcode** and **Mailing ID** may not be activated. See the Search for Absentee Ballots section for instructions on how to find and fix these labels.*

Managing Absentee Ballots

☑ Once absentee ballots are issued, you may have to:
- search for absentee ballots
- reissue absentee ballots
- reprint absentee ballots
- update the actual ballot sent date
- cancel an absentee ballot
- record returned mailings

Search for Absentee Ballots.

1. Expand **(+)** the **Elections** node in the Main Menu tree.

2. Expand **(+)** the current election.

3. Highlight the **Absentee Ballots** node.

4. Enter the criteria you want to search for and click **Search**.

- Search for a voter using the **Last Name**, **First Name**, or **Voter Reg Num** fields.

- Search for groups of voters using the **Vote Location**, **Ballot Status**, or **Date Ballot Issued** fields. The **Application Type** and **Ward** drop downs have been recently added, and are useful as well..

💡 *After you have generated a batch of labels, you should search for those ballots and verify that each ballot has a **Date Ballot Sent** and a **Mailing ID**. These fields may be empty if the mailing was not generated properly or you did not hit **Yes** to confirm it was printed successfully. If these fields are empty, you will not be able to scan the barcode on the absentee label to record the ballot as returned. You will need to **Reprint** the ballot or update the **Date Ballot Sent**.*

💡 *Unlike absentee applications or voter records, you cannot double click to open an absentee ballot record. If you need to **Cancel, Reissue, Reprint**, or change the **Ballot Sent Date**, you will use the **Quick Tasks** menu.*

Reissue Absentee Ballots

Reissuing an absentee ballot cancels the original ballot and creates a second ballot record. Reprinting does not create a new ballot, simply reprints the current record. If you just need another copy of the ballot label, you should reprint the label.

*There are two cases when you will **Reissue** a ballot. First, the voter may request a second (or third) ballot because they spoiled a ballot or changed their mind. Reissuing a ballot will record the fact that the first ballot has been cancelled and another has been issued (Reprinting will not). Second, you may have to **Reissue** a ballot because there is something wrong with your mailing and you are unable to **Reprint**. .*

1. Expand **(+)** the selected election.

2. Click **Absentee Ballots**.

3. Use the voter's name or other criteria to search for the ballot record.

4. Click on the ballot record once to highlight it.

5. Click the **Reissue Ballot** Quick Task. The **Reissue Ballot** task pane will open.

6. Select the **Cancel Outstanding Ballot** checkbox and choose a reason from the **Cancellation Reason** drop down menu.

7. Make sure the **Send Mailing** checkbox is selected.

8. Select the **Mailing to Send** from the drop down list. You will choose **WI Absentee Voter Label** if you are printing the label to a DYMO printer and **WI Absentee Voter Labels 2X5** if you are printing to sheet labels.

*Remember if you **Reissue** or **Reprint** an absentee label, the **Mailing ID** number on the barcode will change. This means that if the original ballot label comes back to your office, you will not be able to scan it as returned because the **Mailing ID** will have changed. See the Record Returned Absentee Ballot Mailing section for instructions on looking up the correct **Mailing ID**.*

9. Print Options:

   a. Click the **Print Now** radio button to print immediately.

      i. Click **Reissue and Print Now**.

      ii. You will see a dialog box saying **Application successfully processed**. Click **OK**.

   iii. A dialog box will appear asking **Did the mailing print successfully?** Click **Yes**.
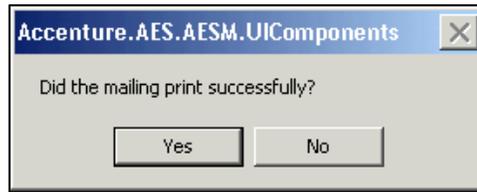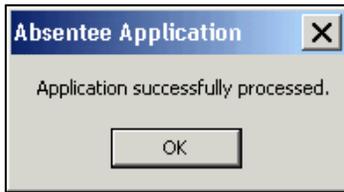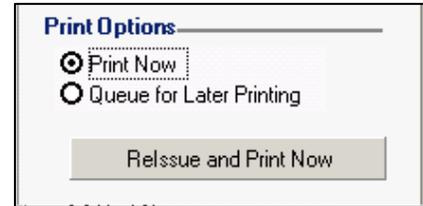
   b. Click the **Queue for Later Printing** button to send this ballot label to the **Queued Mailings** node.

      i. Click **Reissue and Queue For Later**.

      ii. You will see a dialog box saying **Application successfully processed**. Click **OK**.
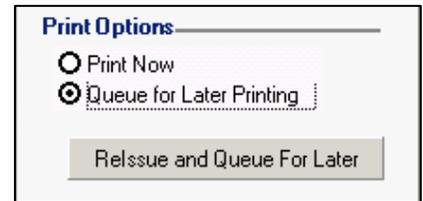
*Even though you must **Reissue** absentee ballot labels one at a time, you can print multiple labels on one page. To do this, make sure you select **WI Absentee Ballot Labels 2X5**, and select **Queue for Later Printing**.*

1. Expand **(+)** the **Labels and Mailings** node.

2. Select **Queued Mailings**.

3. Fill in the **Date Created** fields and **Search**.

4. **Select** all of the ballot records you wish to print using **Ctrl-A** (selects all) or **Ctrl-click** (selects individual records as you click on them).

5. Click the **Print Mailing(s)** Quick Task.
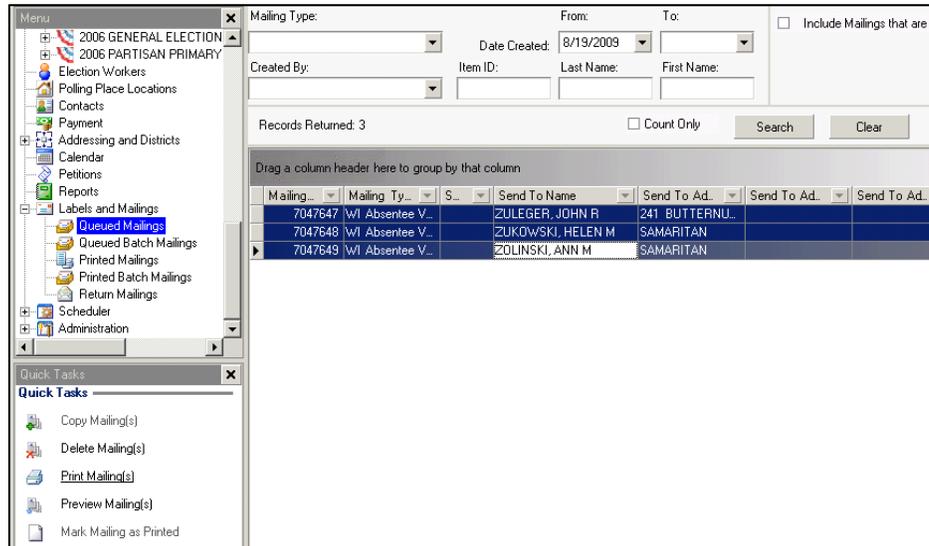
6. You will be asked **Did the mailing print successfully?**. Click **Yes**. The selected labels will print 5 voters per page.

Reprint Absentee Ballots

Reprinting an absentee ballot label does not create a new ballot, simply reprints the current record. Reissuing an absentee ballot cancels the original ballot and creates a second ballot record. If you need to record the fact that the voter requested a second ballot, or you are unable to reprint, you should reissue the label.

You may need to reprint an absentee ballot label if the first label was accidentally deleted before the label was printed or a label that was printed was ruined.

*Remember if you **Reissue** or **Reprint** an absentee label, the **Mailing ID** number on the barcode will change. This means that if the original ballot label comes back to your office, you will not be able to scan it as returned because the **Mailing ID** has changed. See the Record Returned Absentee Ballot Mailing section for instructions on looking up the correct **Mailing ID**.*

1. Expand **(+)** the selected election.

2. Click the **Absentee Ballots** node.

3. Use the voter's name or other criteria to search for the ballot record.

4. Click on the ballot record once to highlight it.

5. Click the **RePrint Ballot** Quick Task. The **Reprint Ballot** task pane will open.

6. Select the **Mailing to Send** from the drop down list. You will choose **WI Absentee Voter Label** if you are printing the label to a DYMO printer and **WI Absentee Voter Labels 2X5** if you are printing to sheet labels.
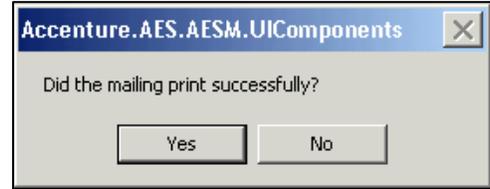
10. Print Options:

    a.   Click the **Print Now** radio button to print immediately.

        i.   Click **Print Ballot**.

        ii.   You will see a dialog box saying **Application successfully processed**. Click **OK**.
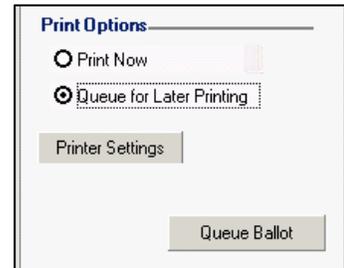
   iii. A dialog box will appear asking **Did the mailing print successfully?** Click **Yes**.

    b.   Click the **Queue for Later Printing** button to send this ballot label to the **Queued Mailings** node.

        i.   Click **Queue Ballot**.

        ii.   You will see a dialog box saying **Application successfully processed**. Click **OK**.

*Even though the **Reprint** Quick Task only allows you to select absentee ballot labels one at a time, you can print multiple labels on one page. To do this, make sure you select **WI Absentee Ballot Labels 2X5**, and select **Queue for Later Printing**. See the Reissue Absentee Ballots section for step by step instructions.*

Update Absentee Ballot Sent Date

You should record the date absentee ballots are actually mailed if different from the day you issue the ballot and generate the label.

1. Expand **(+)** the **Elections** node in the Main Menu tree.

2. Expand **(+)** the current election.

3. Highlight the **Absentee Ballots** node.

4. Enter the criteria you want to search for and click **Search**.

5. **Select** all of the ballot records you wish to update. Use **Ctrl-A** to select all ballots or **Ctrl-click** to select one by one.

6. Click the **Update Ballot Sent Date** Quick Task to open the **Update Ballot Sent Date** task pane.

7. Enter the correct date in the **Date Ballot(s) Sent** box. The **Date Ballot Sent** cannot be changed to a date before the date the ballot was generated.

8. Click **Update Date**. The new **Date Ballot Sent** is entered in the highlighted records.

9. You will see a dialog box stating "**Ballot sent date updated successfully**." Click **OK**.
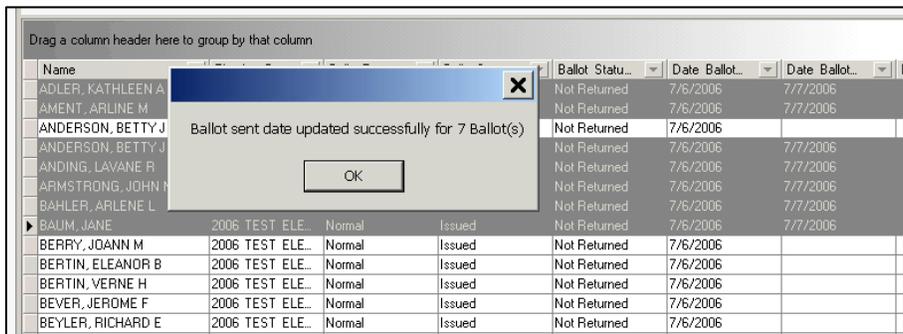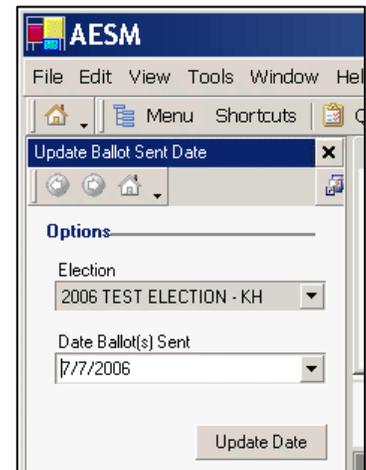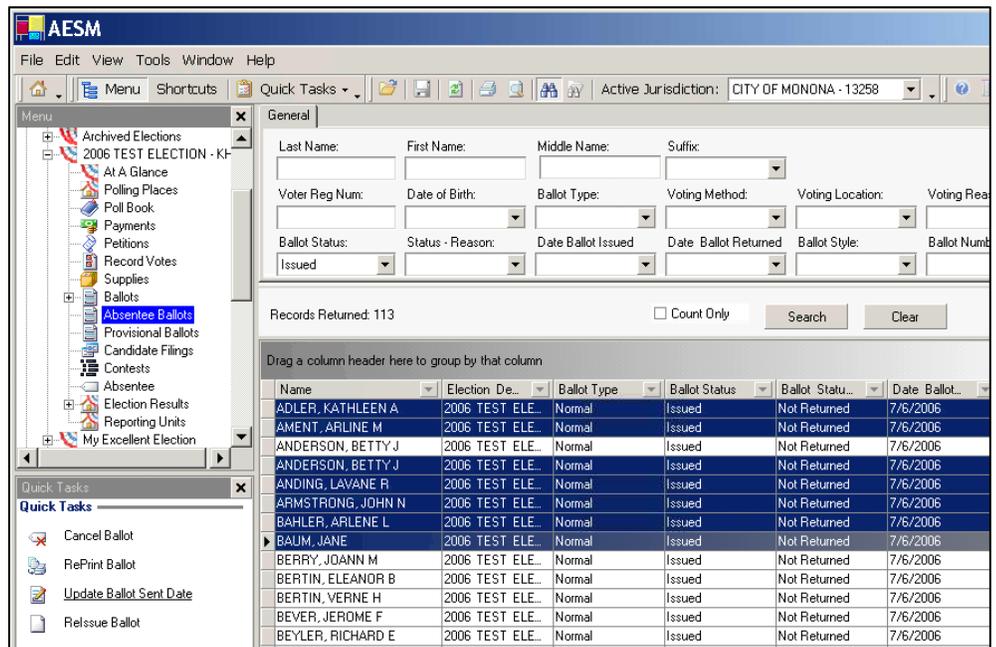
Cancel an Absentee Ballot

☑ There are two ways of cancelling an absentee ballot in SVRS. You may cancel a ballot directly from the Absentee Ballots node for deceased or otherwise ineligible voters, or if you accidentally issue a duplicate ballot label. For ballots returned as undeliverable by the post office, you may use the Record Returned Mailings screen, described in the next section.

Cancel a Ballot Using the Absentee Ballots Node

1. Expand **(+)** the **Elections** node in the Main Menu tree.

2. Expand **(+)** the selected election.

3. Click the **Absentee Ballots** node.

4. Enter the criteria you want to search for and click **Search**.

5. Highlight the ballot you wish to cancel.You can select multiple ballots by holding down the **Control** key and clicking each record. **Ctrl-A** selects all records.

6. Select the **Cancel Ballot** Quick Task. The **Cancel Ballot** task pane will appear.

7. Choose the appropriate **Cancellation Reason** from the drop down menu.

8. Click **Cancel Ballot(s)**.

💡 *If you cancel an outstanding ballot for a voter, it will deactivate any **Mailing ID** previously assigned to that ballot. If you mistakenly issue a duplicate ballot to a voter, you will cancel the second ballot. However, the voter may return either ballot label, and you will not be able to record the mailing as returned if the **Mailing ID** (and **Barcode**) is cancelled. You can look up the **Mailing ID** for the active ballot and record that mailing as returned. See the Record Returned Absentee Ballot Mailing section for directions on looking up a **Mailing ID**.*

Record Returned Absentee Ballot Mailing

All returned absentee ballots need to be recorded. This includes returned ballots and undeliverable mailings.

1. Expand **(+)** the **Elections** node in the Main Menu tree.

2. Expand **(+)** the current election.

3. Click the **Absentee** node.

4. Click the **Record Returned Mailings** Quick Task.

5. In the **Record Returned Mailings** screen, enter the following information:

   a. Position the cursor in the **Mailing ID** field and scan the barcode on the mailing label. You may also enter the **Mailing ID** number manually.

*In rare cases, the **Barcode** and **Mailing ID** number on the label may not work, for instance if you reissued or reprinted a voter's ballot label. You can find the correct **Mailing ID** in two places:*

- *In the **Absentee** node of the election, search for the voter. Expand **(+)** the **Absentee Application** record so you can see the **Absentee Ballot** record(s) in the nested grid. The **Mailing ID** is in the rightmost column of the nested grid..*
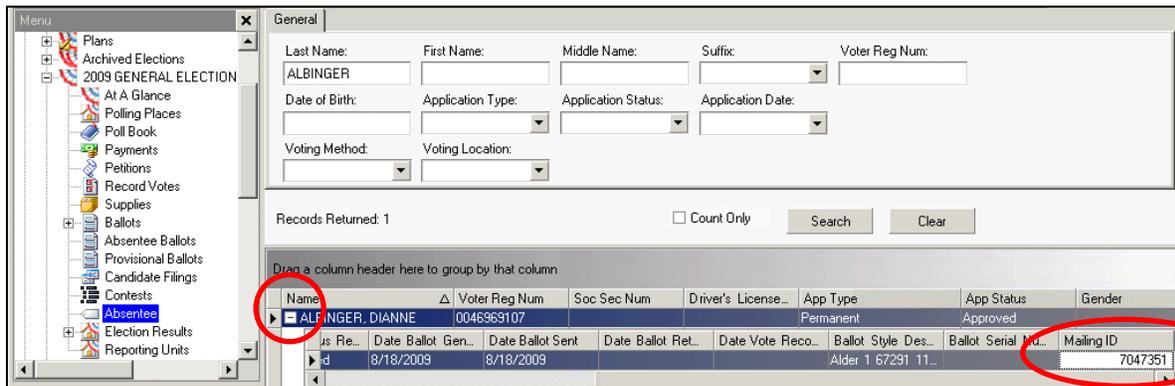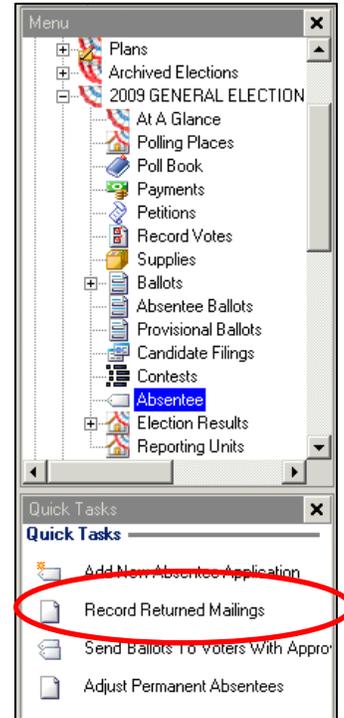
- *In the **Absentee Ballots** node, search for the voter. Scroll to the right to see the **Mailing ID** column.*
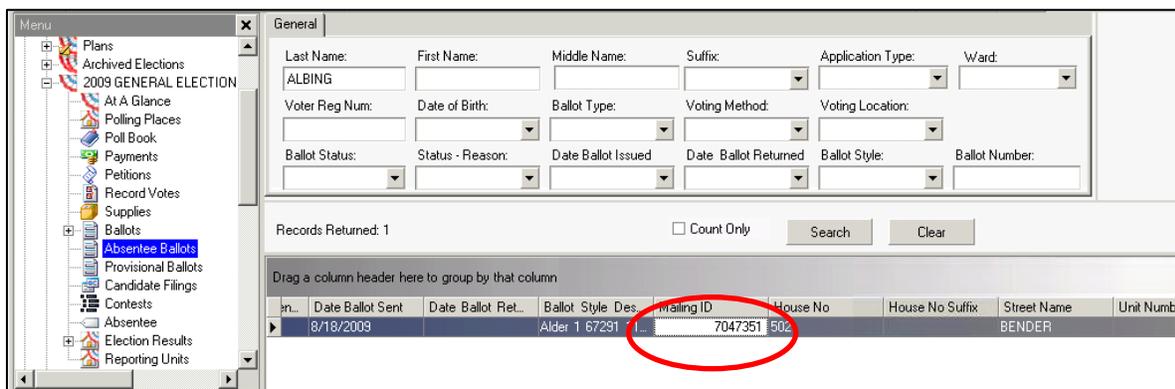
b. Select the appropriate **Response Type** from the drop down menu.

    i.   **Returned – Ballot Returned** is used for voted ballots mailed in or returned to your office.

    ii. **Returned – Ballot Too Late** is used when the ballot is delivered to your office after the deadline (after Election Day for most voters, or later for military absentees in federal elections).

    iii. **DO NOT USE** **Returned – Vote Recorded**. This will record the fact that the voter participated in the election, but you should not do this until after the absentee ballot has been processed on Election Day. You will use the **Record Votes** node to enter voter participation. See the Post Election Activities chapter for instructions.

    iv. **Cancelled – Undeliverable** is used when the post office was unable to deliver the ballot to the address on the absentee mailing label. This will record the mailing as returned, and automatically cancel the ballot at the same time.

    v.   For some other situations, for example when a voter is deceased or identified as a felon, you will cancel the ballot directly from the **Absentee Ballots** node. You may have to cancel or inactivate the absentee application and voter record as well.

c. Enter the **Response Date**.

d. Click the **Record** button. The mailing will be recorded as returned.

e. (Optional) You may check the **Auto-Record** checkbox after you record your first ballot as returned. If **Auto-Record** is checked, the mailing will be recorded as returned automatically as you scan each barcode.

*If you made a mistake and would like to **UnRecord** a mailing, click once on the record in the data grid and click **UnRecord**. Or you can reenter the **Mailing ID** number In the **Mailing ID** field, and the **UnRecord** button will become active.*

6. If you search under the **Absentee Ballots** node for the ballots you have recorded as **Returned**, the **Ballot Status** column will read **Returned**. A **Returned Date** will also appear on the <u>WI Absentee Application Ballot Log</u>.

*Periodically, you should search for all **Clerks Office** absentee ballots issued for a certain date and verify they have been properly scanned. Each ballot record should have a **Ballot Status** of **Returned** and a date listed under the **Date Ballot Returned** column. If any ballot records are missing this information, you will have to note the **Mailing ID** and record the mailing as returned. .*
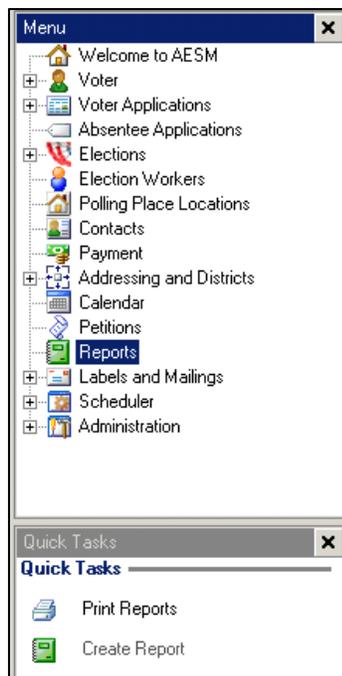
The WI Absentee Application Ballot Log Report

☑ After all absentee applications have been processed, and labels been issued and returned, you must run the WI Absentee Application Ballot Log and distribute it to your polling place(s) or absentee central count facility. This report will show all absentee ballots that have been issued or returned. It will not show cancelled ballots.

💡 *There are two versions of the WI Absentee Application Ballot Log. The WI Absentee Application Ballot Log_ALD_WARD report (listed last) will break up your absentee ballots so each ward begins on a new page and is subtotaled separately from other wards. The WI Absentee Application Ballot Log report (listed second to last) will group all of your absentee ballots together and give you totals for the entire municipality. The directions below will work for either report..*

1. Choose **Reports** from the Main Menu tree.

2. Click on the **Print Reports** Quick Task.

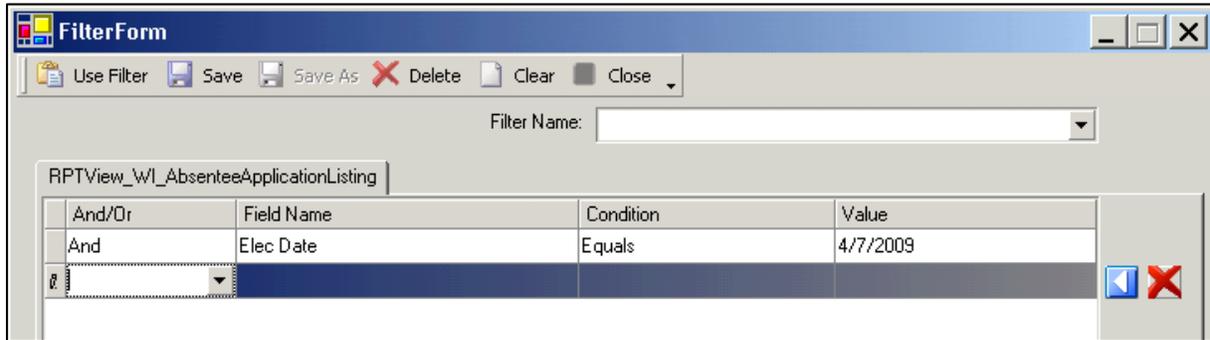3. In the **Category** drop down list, select **Absentee**.
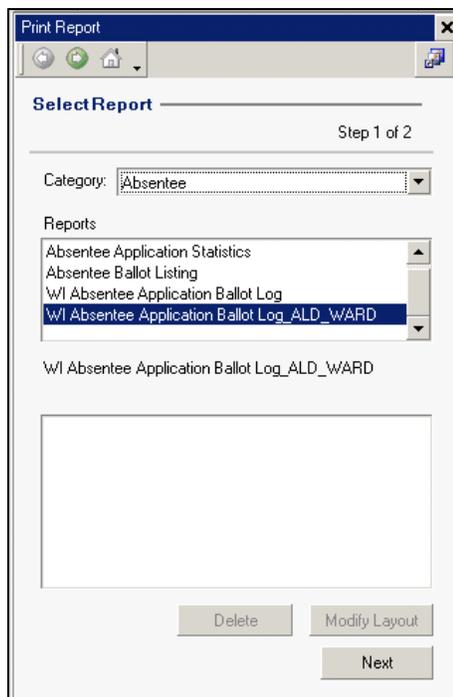
4. In the **Reports** drop down list, select **WI Absentee Application Ballot Log,** or **WI Absentee Application Ballot Log_ALD_WARD.**

5. Click **Next**.

6. **Filter** your report:

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

   b. Copy the filter displayed below. Type the correct election date in dd/mm/yyyy format.

*The filter displayed will produce a list of all issued or returned absentee ballots for the election date you entered. You may also choose to filter this report by **Abs App Type Code** to see only **Permanent, Regular**, or **Military** absentees, or **Abs Bal Vote Location Code** to see only **Nursing Home** absentees, but these partial absentee logs are for your own use only, and should not be sent to the polling place on Election Day.*

   c. Click **Use Filter**.

7. **Sort** your report:

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

   b. Copy the **Sort** displayed. This will put your report in order by the voters' names.
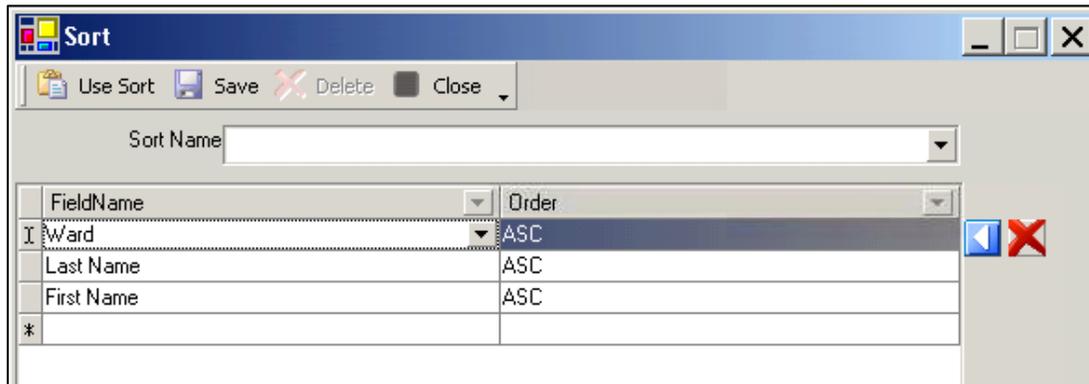
*The first line, **Ward, ASC**, is only necessary if you are running the WI Absentee Application Ballot Log. The WI Absentee Application Ballots Log_ALD_WARD report will automatically divide up your report by wards.*

   c. Click **Use Sort**.

8. Click the **Printer Setup** button and verify that your printer settings are correct. Once they are correct, click **Save Settings**.

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

10. Click the **Print** button.
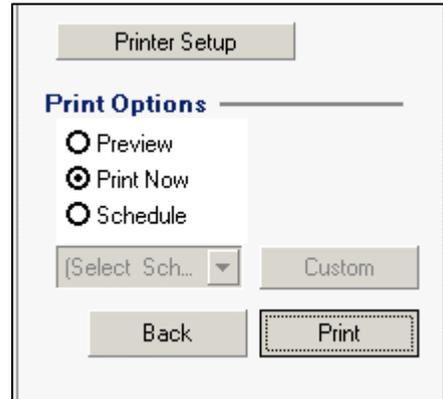
11. The Print Notification dialog box will open. Click **OK**.

💡 *For further information on filtering, sorting, printing, and exporting a report, see the Reports chapter.*

A sample of the **WI Absentee Application Ballot Log** report is shown below.

CITY OF MADISON   WI_R_ABS_LOG
                                                                       8/21/2009 7:10:36 PM

Absentee Applications Ballot Log

CITY OF MADISON   ELECTION: 2009 SPRING ELECTION (Apr 07, 2009)

Voter ID	Name and Address	Ward	App. Received	Ballot Issued	Ballot Returned	Ballot Status	Vote Recorded	Ballot Combo
0000344251 [barcode] App. Type: Permanent	**Benedetti, Florio** 5129 Turner Ave Madison, WI 53716	WD001	01/24/2006	03/13/2009	03/25/2009	RET	04/07/2009	Madison16
0000432662 [barcode] App. Type: Regular	**Clevenger, Valerie D** 1005 Glenview Dr Madison, WI 53716	WD001	03/28/2009	03/30/2009	04/04/2009	RET	04/07/2009	Madison16
0000543192 [barcode] App. Type: Regular	**Cotter, Barbara A** 1005 Glenview Dr Madison, WI 53716	WD001	03/26/2009	03/27/2009	03/27/2009	RET	04/07/2009	Madison16

💡 *Note that this report shows **Voter** and **Absentee Application** information, as well as when the ballot was sent and returned. The **Ballot Combo** column contains the **Ballot Style** for that voter, and the **Vote Recorded** column shows whether the voter participation has been entered.*

Post Election Management of the Absentee Process

There are a number of steps you should take after the election to manage your absentee voters:

- Normally, you may not enter absentee applications after Election Day, but that deadline can be extended if you need to make some additions or corrections. This involves changing the election setup, so you will need to contact the GAB Help Desk or your SVRS Specialist for help.

- You will record all of your absentee voters who returned a ballot as having voted absentee. Directions can be found in the Post Election Activities chapter.

- For information on adjusting permanent absentee applications for voters that did not return their ballot, see the Absentee Applications chapter.

- You should **cancel all of your issued absentee ballots that were not returned**. Occasionally, you may have issued a ballot for a voter, and they did not return it, but instead registered and voted in another municipality. That municipality will not be able to process the voter's GAB-131 Voter Registration Application form if they still have an active (issued) ballot in your municipality. Cancelling your ballots as a group will prevent this problem.

  1. Within the election, highlight the **Absentee Ballots** node.

  2. Under **Ballot Status**, select **Issued**, and **Search**.

  3. Highlight all ballot records using **Ctrl-A**.

  4. Click the **Cancel Ballot** Quick Task.

  5. Under the **Cancellation Reason**, select **Ballot Not Returned**.

  6. Click the **Cancel Ballot(s)** button.

  7. You should see a dialog box that says **Ballot(s) cancelled successfully**. Click **OK**.

*Note, you may still record late ballots as **Returned – Ballot Too Late**, even if you have cancelled them. See the Record Returned Absentee Ballot Mailing section for instructions.*