

Overview of Milestones and Activities	Details
<input type="checkbox"/> 1. Set up or “Inherit” Election (Select an Election to Work With)	<ul style="list-style-type: none"> <li>• Verify that you have added Polling Place Locations and created a Polling Place Assignment Plan.</li> <li>• Absentee Applications can be added before the election cycle begins.</li> </ul>
<input type="checkbox"/> a. Counties “Inherit” Election from State; Municipalities “Inherit” Election from County	
<input type="checkbox"/> b. Assign Polling Place Assignment Plan	
<input type="checkbox"/> 2. <b>Milestone 1: Election Setup</b> The basic election setup is complete and the election is Scheduled.	<ul style="list-style-type: none"> <li>• This milestone is automatically marked complete when the election setup Wizard creates an election for a particular jurisdiction.</li> </ul>
<input type="checkbox"/> 3. <b>Check Milestone 2: Election Active</b> If checked, the election cycle has begun and the election is active.	<ul style="list-style-type: none"> <li>• Allows contests to be set up and candidates to be entered.</li> </ul>
<input type="checkbox"/> 4. Enter Detailed Election Information	
<input type="checkbox"/> a. Add Contests and Referenda	<ul style="list-style-type: none"> <li>• Office Types can be set up prior to an election and are reused each time the office is added as a contest to an election.</li> </ul>
<input type="checkbox"/> b. Add New Candidate Filing	
<input type="checkbox"/> i. Add Contact Record (if not registered voter)	
<input type="checkbox"/> ii. Add and Approve Candidate Filing	
<input type="checkbox"/> 5. <b>Check Milestone 3: Ballot Setup Finalized</b> If checked, all contest changes and candidate filings are set up and ballot styles can be generated.	<ul style="list-style-type: none"> <li>• No changes to candidates, contests, or referenda can be made after reaching this milestone.</li> <li>• This milestone must be coordinated between jurisdictions that have the same contest on ballots.</li> </ul>
<input type="checkbox"/> 6. Generate Ballot Styles	<ul style="list-style-type: none"> <li>• Do not generate absentee ballot labels until after ballot styles have been generated.</li> </ul>
<input type="checkbox"/> 7. <b>Check Milestone 4: Ballot Styles Finalized</b> If checked, all ballot styles are set up and absentee ballots can be processed.	<ul style="list-style-type: none"> <li>• After this milestone is reached, ballot styles have been created and no changes to ballot styles are allowed.</li> <li>• After creating ballot styles, no changes can be made to District Combos.</li> <li>• Labels for absentee ballots cannot be generated before this milestone is reached.</li> </ul>
<input type="checkbox"/> 8. Generate and Send Absentee Ballots (Issue Ballots and Generate Labels as a Batch)	
<input type="checkbox"/> 9. Continue to add Late Registrations	
<input type="checkbox"/> 10. Setup and Print Poll Books	
<input type="checkbox"/> 11. Continue to Add Absentee Applications, Issue Absentee Ballots and Generate Labels	
<input type="checkbox"/> 12. <b>Check Milestone 5: Poll Books Printed</b> If checked, poll book printing is completed for the election.	
<input type="checkbox"/> 13. Process Election Day Registrations and Update Proof of Residence	
<input type="checkbox"/> 14. Record Ballots with Barcode Scanners	
<input type="checkbox"/> 15. Record Contest Winners and Update Office Holders	
<input type="checkbox"/> 16. <b>Check Milestone 6: Election Results Finalized</b> If checked, all election results are entered for the election.	
<input type="checkbox"/> 17. <b>Check Milestone 7: Payments Complete</b> If checked, all payments are entered and completed for the election.	<ul style="list-style-type: none"> <li>• Using SVRS to generate payments to Workers and Polling Place Locations is optional at this time.</li> </ul>
<input type="checkbox"/> 18. Mark Polling Places Used (Optional)	
<input type="checkbox"/> 19. <b>Check Milestone 8: Election Day Closed</b> If checked, the election day has passed, but all voting activity is not yet recorded.	
<input type="checkbox"/> 20. <b>Check Milestone 9: Election Finalized</b> If checked, all election tasks are completed and the election is closed.	<ul style="list-style-type: none"> <li>• Corresponds with the election status of <b>closed</b>.</li> </ul>

**This is a sample only, the election dates and election name will change from election to election.**

Detailed instructions for each step can be found in the section of the updated training materials noted in parenthesis below.

Please refer to the updated materials found on the Government Accountability Board - Elections Division website: <http://elections.wi.gov>

SVRS Project > Documents and Materials > SVRS Application Training Participant Guide (Referenced Section)

**Steps 1 – 3 have been performed by the Government Accountability Board – Elections Division.**

**Steps 4-5 are performed by each county by the end of the day, Friday, March 13, 2009.**

☐ Step 4: Counties inherit the 2009 Spring Election created by the State. (*Election Set-Up: Page 10*)

☐ Step 5: Counties check Milestone #2 for the election. Milestone #1 is automatically checked when the election is inherited. (*Election Set-Up: Page 14*)

**Steps 6-7 are performed no later than Friday, March 13, 2009 by the counties.**

*Note: The GAB checked Milestone #3 at the state level, March 6, 2009.*

☐ Step 6: Counties set up offices (*Districts and Offices: Pages 11-21*), contests (*Election Set-Up: Pages 15-17*) and candidates for county elections (*Election Set-Up: Pages 19-20*), which include any school board referenda. (*Election Set-Up: Page 17*)

☐ Step 7: Counties set Milestone #3 for the 2009 Spring Election before but no later than March 13, 2009 (*Election Set-Up: Page 22*) Immediately notify Self-Providers that Milestone #3 has been checked at the county level.

**Steps 8-10 can be done before Step 7 is completed. All steps performed no later than Tuesday, March 17, 2009.**

☐ Step 8: Self-Providers and Providers for their Relier(s) set up all polling place locations and Polling Place Assignment Plans (PPAPs), if not already set up. (*Polling Place: Pages 1 and 5*)

☐ Step 9: Self-Providers and Providers for their Relier(s) inherit the 2009 Spring Election created by GAB and inherited by the county. (*Election Set-Up: Page 10*) Assign the PPAP to this election (if created), or a polling place location if a PPAP was not selected. (*Polling Place: Pages 1 and 5*)

☐ Step 10: Self-Providers and Providers for their Relier(s) set up offices (*Districts and Offices: Pages 11-21*), contests (*Election Set-Up: Pages 15-17*), including local referenda (*Election Set-Up: Page 17*), and candidates. (*Election Set-Up: Pages 19-20*)

☐ Step 11: Self-Providers and Providers for their Relier(s) set Milestone #3 for the election no later than March 17, 2009. Do not complete this step until receiving notice that the county has completed Step 7. (*Election Set-Up: Page 22*)

☐ Step 12: Self-Providers and Providers for their Relier(s) generate Ballot Styles. (*Election Set-Up: Page 23*)

☐ Step 13: Self-Providers or Providers for their Relier(s) set Milestone #4 for the election. (*Election Set-Up: Page 24*)

☐ Step 14: Self-Providers and Providers for the Relier(s) issue Absentee Ballots. Using SVRS to produce absentee ballot labels is optional at this time. If you have not attended formal absentee ballot process training, it is strongly recommended SVRS is not used for the absentee ballots for this election. If you do use SVRS labels, it is important to note that the Absentee Applications must be processed and ballot styles generated before Absentee Ballots are issued.

Coming Soon

☐ March 18: Last day for registration outside of the clerk's office by 5pm

☐ March 25: Recommended first day of poll book printing.

☐ April 8 – May 8: Post Election and Close-out Tasks.

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#### **Wednesday, March 18, 2009 CLOSE OF VOTER REGISTRATION**

☐ Enter all EB-131s from voters who registered in person by close of business March 18, 2009.

◆ “In Person” is defined as registering in front of an election official – a clerk or special registration deputy. Examples of in-person registration are: in your office, at libraries, and at schools. In-person registration can also occur during special registration drives in front of a special registration deputy.

☐ Enter all mailed-in EB-131s that are postmarked on or before March 18, 2009.

◆ You must enter into SVRS all mailed-in EB-131s postmarked on or before March 18. In the Voter Application screen in SVRS, you will enter the postmark date into the field labeled **Effec. Reg. Date**. **Example:** John’s registration form is postmarked March 18 and it arrives in the clerk’s office on April 2; you should enter March 18 as the effective registration date. If you are transferring John into your municipality, make sure you update the effective date to reflect the postmark.

#### **Thursday, March 19, 2009 – Monday, April 6, 2009 LATE REGISTRATION PERIOD**

☐ When voters register in your office after March 18, you must issue each of them a Certificate of Registration (EB-133). Since the EB-133 is used exclusively by clerks in their office, the form is available to clerks from the GAB Help Desk (608-261-2028) by fax, USPS, email or generated through SVRS. A fill-able version of the form, which can be typed-in rather than hand-written, is also available by email or generated through SVRS.

◆ Late Registration may only take place:

1. In the Municipal Clerk’s office
2. In the County Clerk’s office if the municipality is relying on that County
3. If a hospitalized elector registers by agent.

◆ Anyone registering after March 18 must receive a Certificate of Registration.

◆ Providers who carry out late registration duties on behalf of their Relier(s) during this period must also issue Certificates of Registration (EB-133). When Providers assign sequential numbers to the Certificates of Registration, the Provider should put a “C” after the number.

**Example:** Jane lives in the Village of Elkhart Lake which Relies on Sheboygan County. Jane can go to the Sheboygan County Clerk’s office to register and receive a Certificate of Registration instead of visiting the clerk’s office in Elkhart Lake.

◆ Counties cannot register voters on behalf of Self-Providers during Late Registration.

**Example:** Mary lives in the City of DePere – a Self Provider. If Mary tries to register in the County Clerk’s office after March 18, she will be re-directed to the City of DePere Clerk to register and receive a Certificate of Registration.

◆ All mail-in registration forms that are postmarked **AFTER MARCH 18** are **INVALID** for the 2009 Spring Election. If you receive mail-in registration forms postmarked after March 18, please contact the voter and recommend that he/she choose one of the following:

1. Visit the clerk’s office and register in person before the election – requires proof of residence
2. Register (EDR) at the Polling Place – requires proof of residence
3. Hold his/her registration for post election entry – this option means the person will not be allowed to vote until a future election.

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**NOTE:** (Optional) If you are using SVRS to track absentees, continue to process absentee applications and issue absentee ballots in SVRS.

#### **April 6, 2009 DEADLINE TO PRINT POLL BOOKS**

#### **When Should I Print My Poll Book?**

The GAB Elections Division strongly encourages you to wait until at least March 25, 2009 to print your official poll book. Please consider the following when determining when to print your poll book:

- ◆ Once you print your final poll book, anyone who registers after that will not show up on any pre-printed poll list, and will be required to provide a Certificate of Registration (EB-133) at the polling place. Although all late registrants will have received a Certificate of Registration, only those not appearing on the pre-printed list will be required to provide it at the polling place.
- ◆ Poll workers will need to record voter information on the Supplemental Poll List (EB-107) from those who provide Certificate of Registration (EB-133) at the Polling Place and who do not appear on the pre-printed Supplemental Poll Book (see below).
- ◆ Providers should consider how long it takes to print and deliver poll books. Give yourself a reasonable timeframe to deliver poll books to your polling places on time.

The more names that appear on the printed poll book, the fewer names poll workers will have to manually add to the EB-107 on Election Day and the fewer names clerks will have to later manually reconcile voter participation within SVRS. This will reduce confusion for poll workers, reduce inconvenience to voters, and reduce confusion for clerks.

#### **How Is My Poll Book Organized?**

##### **PART I: Poll Book (generated by and printed from SVRS)**

- a) Contains names of all voters who registered by March 18
- b) Contains names of all Confidential Voters who registered by March 18

##### **PART II: Supplemental Poll Book (generated by and printed from SVRS)**

- a) Contains names of all voters who registered during Late Registration until the time you printed your poll book
- b) Contains names of all Confidential Voters who registered during Late Registration until the time you printed your poll book

##### **HAND-WRITTEN SUPPLEMENTAL LIST (EB-107):**

- a) Contains names of voters who present Certificates of Registration at the polls and whose names do not appear on the supplemental poll book
- b) Contains names of voters who register on Election Day

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<b><i>How Application Received</i></b>	<b><i>By 5pm on March 18</i></b>	<b><i>Between March 19 and the day you print your Poll Book</i></b>	<b><i>From when you print your Poll Book through Election Day</i></b>
<b><i>In Person in clerk's office</i></b>	Part I of Poll Book	Part II of Poll Book	EB-107 Supplemental List Only voters who present Certificates of Registration at the polls
<b><i>In Person outside clerk's office</i></b>	Part I of Poll Book	<b>Invalid.</b> Not included on any list.	EB-107 Supplemental List Only voters who register at the polling place on Election Day
<b><i>Mail</i></b>	Part I of Poll Book postmarked by March 18	<b>Invalid.</b> Not included on any list.	<b>Invalid.</b> Not included on any list.

#### **How Do I Print My Poll Book?**

- ◆ Instructions are on Pages 2-16 of the *Set up & Print Poll Book* tab in your updated Application Training Participant Guide. (page numbers refer to the updated sections posted on the GAB website)
- ◆ If you generate and print a test poll book before your official poll book, you need to delete it and generate a new one to use as your official poll book.
- ◆ If you print your poll book from a computer that is not certified for use on SVRS, you must install the *3 of 9 Barcode* font before barcodes will print.

#### **What Happens After I Print My Poll Book?**

Prepare Poll Lists for use at Polling Places

Provide poll workers with copies of blank Supplemental Poll List forms for your poll book binder.  
(**EB-107** from *Forms & Publications* at <http://elections.wi.gov/>)

Self-Providers and Providers for their Relier(s) set milestone #5.

Checking milestone #5 is an indication to GAB that you have printed out official poll books – do not do this until you know you are satisfied with your poll list.

#### **TUESDAY, APRIL 7, 2009 ELECTION DAY!**

#### **Coming Soon: April 8-May 8: Post Election Activities and Close-out Tasks**

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Detailed instructions for each step can be found in the section of the updated training materials noted in parenthesis below.

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#### **Steps 1 – 14 were completed prior to the election. (SVRS Election Checklist I)**

#### **Steps 15 – 16 are performed after the polls close.**

- ☐ Step 15: Count ballots, tabulate votes and record on the appropriate Tally Sheets, and complete forms. (See *Post-Election Checklist, Page 72 in the "Election Day Manual for Wisconsin Election Officials" (January 2009).*)
- ☐ Step 16: Municipalities send one original copy of each poll list to the County Clerk by 4:00 p.m. the day after the election. (See *Post-Election Checklist, Page 72 in the "Election Day Manual for Election Officials" (January 2009).*)

#### **Steps 17 – 21 and Steps 23 - 26 are performed within the next 30 days after the 2009 Spring Election. Step 22 is performed after 4:00pm on April 8, 2009.**

- ☐ Step 17: Reliers promptly send copies of any EB-131s not already entered in to SVRS (including late registrations and Election Day registrations) and Poll Lists to Providers (if not already provided to the county clerk)
- ☐ Step 18: Self Providers or Providers for their Relier(s) check Election Milestone 5, if not already checked, for the 2009 Spring Election. (*Set up & Print Poll Book: Pages 16-17*)
- ☐ Step 19: Self Providers or Providers for their Relier(s) enter and process late registrations in SVRS. Choose the App Source of "Late Registration." (*Voter Application: Pages 6-17*)
- ☐ Step 20: Self Providers or Providers for their Relier(s) record voter participation in SVRS. For Late Registrants processed in Step 19, the Voter ID number will have to be entered manually to record voter participation. (*Post Election Activities: Pages 4-6*)
- ☐ Step 21: Self Providers or Providers for their Relier(s) process Election Day registrations in SVRS with the App Source of "Election Day Registration." This will automatically record a voting record. If no ballot was issued, choose the App Source of "Election Day Registration – No Ballot Issued." (*Voter Application: Pages 18-21*)
  - ☐ If any Election Day registrations are incomplete applications, see the SVRS Application Training Participant Guide for instructions on processing the application. (*Voter Application: Page 22*)
- ☐ Step 22: If any Provisional Ballots were issued, Self Providers and Reliers are reminded to report them to the GAB - Elections Division, including whether or not the ballot was counted.
- ☐ Step 23: Self Providers or Providers for their Relier(s) review Poll Books. Update voter records for Proof of Residence (ID Required) provided by voter. (*Voter-Maintaining Voter Records: Page 14*) Update any name changes noted on the poll books. (*Voter-Maintaining Voter Records: Page 9*)
- ☐ Step 24: Municipal Clerks complete Election Voting and Registration Statistics Report (GAB-190). If entering the GAB-190 online using the Wisconsin Election Data Collection System (WEDCS), complete and submit the electronic form and print a paper copy for your records. If you are not entering the GAB-190 online using the WEDCS, send a paper copy to your County Clerk, keeping an additional copy for your records. Some County Clerks will enter the GAB-190 online on behalf of the municipal clerk and print a copy for their records. If the municipal clerk is unsure of who will be entering the GAB-190 into the WEDCS, contact your County Clerk.
- ☐ Step 25: Self Providers or Providers for their Relier(s) check Milestones 6-9 for the 2009 Spring Election. (*Post Election Activities: Pages 11-12*)
- ☐ Step 26: County checks Milestones 5-9 for the 2009 Spring Election (after all municipalities have checked theirs). (*Set up & Print Poll Book: Pages 16-17*) (*Post Election Activities: Pages 11-12*)