

Handling Undeliverable Ballots in MT Votes

A quick primer

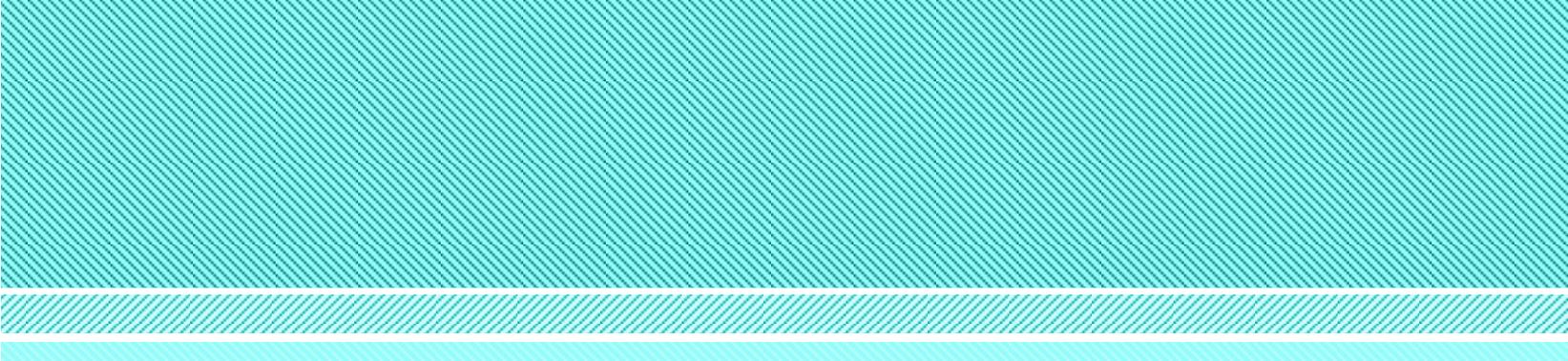
Secretary of State Linda McCulloch
Elections and Government Services Division
April, 2016

General Info

- **For Mail Ballot Elections:**
 - Attempt to contact the elector
 - Mail a forwardable, first class postage paid, return addressed notice
 - In ODD year elections, if the notice is returned undeliverable, inactive the elector
 - In EVEN year elections, do not inactive due to NVRA prohibitions on list maintenance for federal elections
 - See slide #29 for information on undeliverable ballots returned with USPS yellow forwarding address stickers.

General Info

- For a poll elections:
 - investigate the reason for the return.
 - Upon notification by the elector of the elector's correct mailing address, the elector must be provided with the undeliverable ballot or with a replacement ballot.
 - See slide #29 for information on undeliverable ballots returned with USPS yellow forwarding address stickers.



Entering Undeliverable Ballots into MT Votes

Undeliverable

Click in the **ID field** and either scan or key in a ballot barcode and click **Add**.

The screenshot shows a software window titled "Undeliverable Ballots" with a "Help" link in the top right corner. The interface is divided into several sections:

- Batch:** Contains fields for "Election" (06/07/2016 51-Federal Primary Election 2016), "Batch Description", "Batch Date" (04/27/2016), "Received Date" (04/27/2016), and "Identifier".
- Ballot Label:** Features an "ID" field with the value "453981182" and an "Add" button.
- Ballot Search:** Includes fields for "Name", "Street", and "City", along with a "Search" button.
- Voter Details:** Contains fields for "Name on Ballot", "Name in Record", "Status", "Ballot Residential Address", "Current Residential Address", "Ballot Mail Address", and "Current Mail Address".

At the bottom of the window, there is a row of navigation buttons: "Delete", "First", "Previous", "Next", "Last", "View Ballots", "Voter Details", "Save", and "Close". A "Review Registration" checkbox and a "Change Now" button are also located near the bottom.

Undeliverable

The Voter Details will display.

- Review Displayed information
- Add additional IDs
- Click **Save** and **Close**

The screenshot shows a web application window titled "Undeliverable Ballots". At the top, a green message states "Ballot has been received." with a "Help" link. The form is divided into several sections:

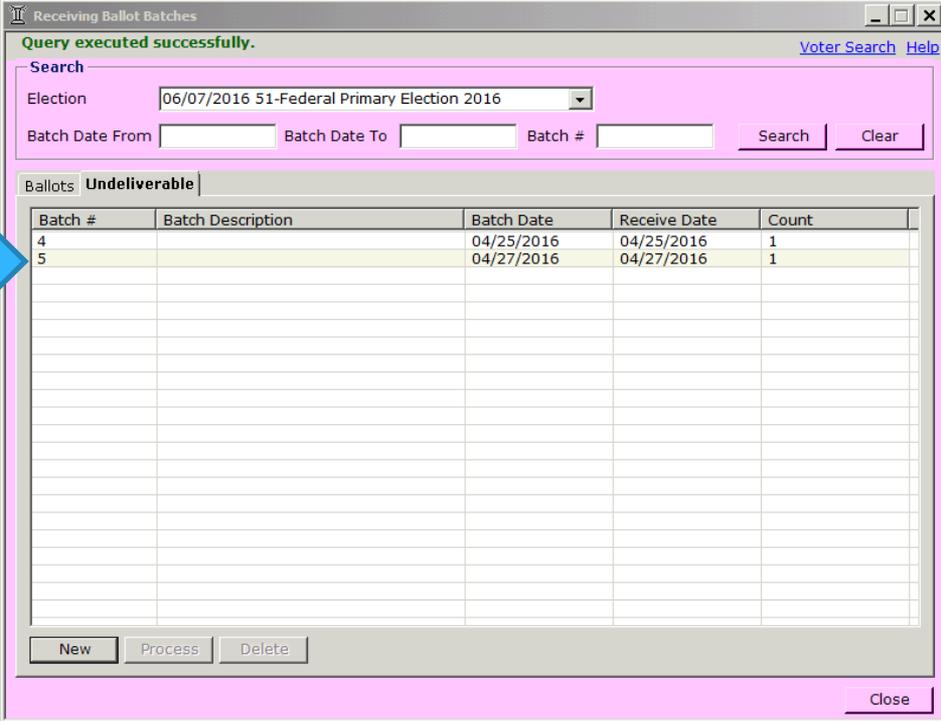
- Batch:** Election (06/07/2016 51-Federal Primary Election 2016), Batch Description, Batch Date (04/27/2016), Received Date (04/27/2016), and Identifier.
- Ballot Label:** ID field with an "Add" button.
- Ballot Search:** Name, Street, and City fields with a "Search" button.
- Voter Details:**
 - Name on Ballot: TEST, VOTER; Name in Record: TEST, VOTER
 - Status: Active
 - Ballot Residential Address: 20 N MAIN, JEFFERSON CITY, MT 59638
 - Current Residential Address: 20 N MAIN, JEFFERSON CITY, MT 59638
 - Ballot Mail Address: 10 TEST AVE, HELENA, MT 59601; Address Type: Civilian Overseas
 - Current Mail Address: 10 TEST AVE, HELENA, MT 59601

At the bottom, there is a "Review Registration" checkbox and a "Change Now" button. The footer contains navigation buttons: Delete, First, Previous, Next, Last, View Ballots, Voter Details, Save, and Close.

Undeliverable

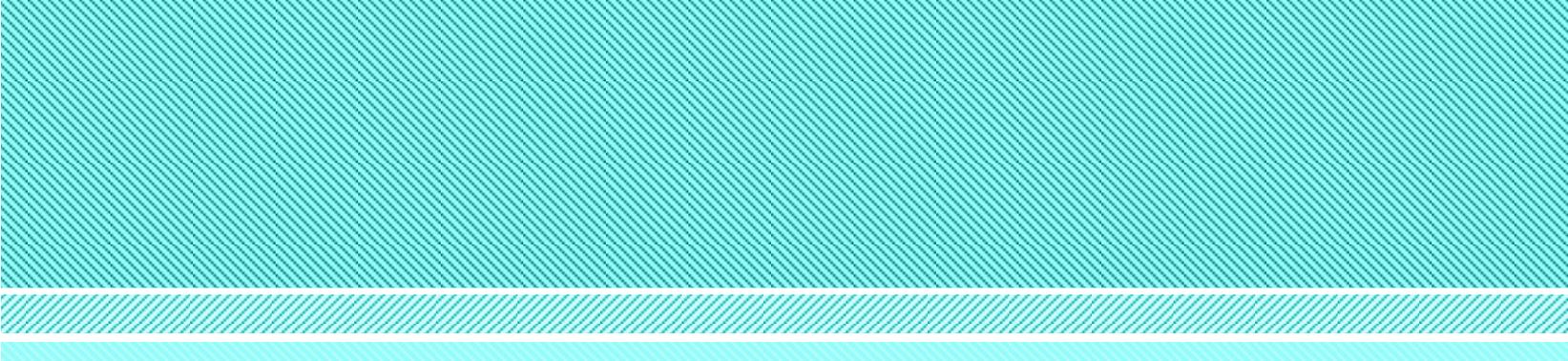
The new undeliverable ballot batch will be displayed.

- Follow the previous steps to add in additional undeliverable ballots
- Close Ballot Processing when finished



The screenshot shows a software window titled "Receiving Ballot Batches". At the top, a green message states "Query executed successfully." with links for "Voter Search" and "Help". Below this is a search section with a dropdown menu for "Election" set to "06/07/2016 51-Federal Primary Election 2016", and input fields for "Batch Date From", "Batch Date To", and "Batch #". There are "Search" and "Clear" buttons. The main area is a table with a tab labeled "Undeliverable". The table has five columns: "Batch #", "Batch Description", "Batch Date", "Receive Date", and "Count". Two rows are visible, both highlighted in yellow. A blue arrow points to the first row. At the bottom of the window are buttons for "New", "Process", "Delete", and "Close".

Batch #	Batch Description	Batch Date	Receive Date	Count
4		04/25/2016	04/25/2016	1
5		04/27/2016	04/27/2016	1



Releasing Undeliverable Ballots to Voter in Office

Releasing Undeliverable Ballots

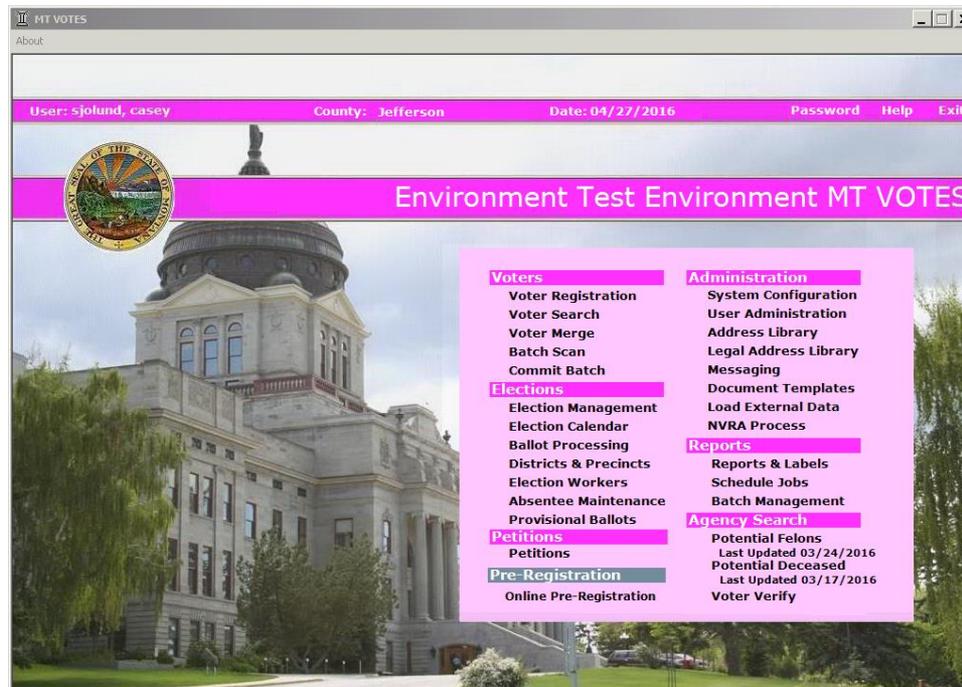
Releasing Undeliverable Ballots

- Sometimes a ballot comes back undeliverable and the person appears in the office to resolve the undeliverable ballot.
- In this case, the undeliverable ballot must be released to the person (make sure the person updates their mailing address if necessary).

Releasing Undeliverable Ballots

To release the ballot, you need to remove it from the undeliverable batch.

To locate the batch, click **Voter Search**.



Releasing Undeliverable Ballots

Pull up the voter, and then click on **Elections**, **Active Ballots**.

The screenshot shows a web-based interface for voter registration. The main window is titled "Voter Registration" and has a menu bar with "Voter", "Print", "Elections", "Petitions", "Imaging", and "Address". A sidebar on the left contains a "Voter rec" menu with options: "New", "Active Ballots" (highlighted), "Temporary Parties", "Provisional Ballot", "Issue Ballot", "Receive Ballot F12", "View Worker Info", and "Search By Ballot ID". The main content area is divided into several sections:

- Registration Info:** Fields for Birth Date (01/22/1980), Age (36), Gender, Last Name (TEST), First Name (VOTER), MI, and Suffix.
- Residence:** Fields for House # (20), Post Dir, City/St/Z (HELENA, MT, 59638), County (JEFFERSON), Precinct (06-75), and Split (01.06).
- Mailing:** Fields for Country (UNITED STATES OF AMERICA), Address (10 TEST AVE), and City/St/Zip (HELENA, MT, 59601).
- Active/Undeliverable:** A section with tabs for "Registration", "Misc Info", "Custom", "Duplicate Reg.", and "Undeliverable". It includes fields for Party (No Party), Status (Active - A), Reason, Source of Registration (DMV - 01), Old Voter ID, County Reg Date (04/22/2016), Vote Eligible (04/22/2016), Last Voted Date, and checkboxes for "No Signature", "Confidential", "US Citizen", and "MVD Verified".
- Voter Polling Locations:** Fields for Precinct (PREC.06 - 06-75), Split (01.06), and Polling Place (JEFFERSON CITY COMMUNITY HALL).
- Election Table:** A table with columns: Election, Late Reg Date, Date, and Polling Places.

Election	Late Reg Date	Date	Polling Places
51-Federal Primary E...	05/08/2016	06/07/2016	JEFFERSON CITY COMMUN
- Districts Table:** A table with columns: District Type, Code, and Name.

District Type	Code	Name
CONGRESSIONAL	CONG	CONGRESSIONAL
STATEWIDE	MT	Montana
PUBLIC SERVICE C...	PS 03	Public Service Commissioner, Distr
JUDICIAL	JD 05	Judicial District 5
SUPREME COURT J...	SCJ	SUPREME COURT JUSTICE
SENATE DISTRICT	SD 38	Senate District 38
HOUSE DISTRICT	HD 075	House District 75
COUNTYWIDE	22	Jefferson
LIBRARY	02	NORTH JEFFERSON COUNTY LIBRAI
SCHOOL DISTRICT	HS-1	JEFFERSON HIGH SCHOOL DISTRICT

Releasing Undeliverable Ballots

Scroll over, and write down the batch number for the undeliverable ballot. Close out to the main menu.

Active Election Ballots

[Help](#)

Election Name: 06/07/2016 51-Federal Primary Election 2016

Active Ballots

Stage	Ballot Type	Ballot Status	Ballot Status Reason	Ballot Batch #	Resent Address	Resent Date
verable	Reissued			5		

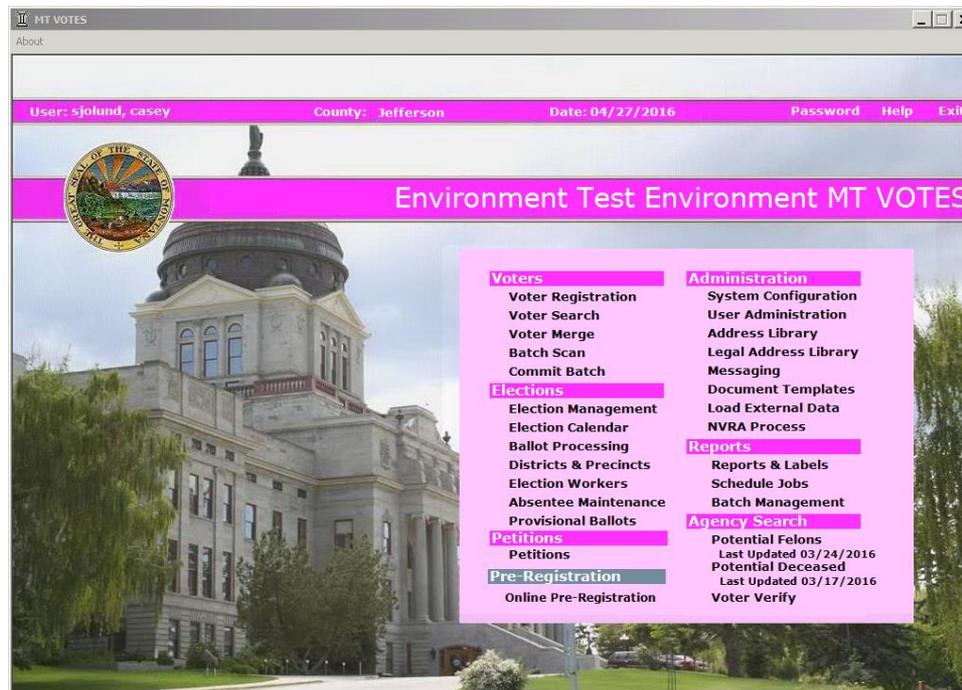
Other Ballots

Election	County	Ballot ID	Ballot Seq. #	Sent Date	Received Date	Print Date	Residential Address	Ballo
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Receive Ballot Show All Ballots Delete Add Exception Close

Releasing Undeliverable Ballots

From the main menu of MT Votes, click on the **Ballot Processing** module.



Releasing Undeliverable Ballots

Highlight the batch # and then click **Process**

The screenshot shows a software window titled "Receiving Ballot Batches". At the top, a status message reads "Query executed successfully." with links for "Voter Search" and "Help". Below this is a search section with a dropdown menu for "Election" set to "06/07/2016 51-Federal Primary Election 2016", and input fields for "Batch Date From", "Batch Date To", and "Batch #". There are "Search" and "Clear" buttons. The main area is a table with the tab "Ballots: Undeliverable". The table has five columns: "Batch #", "Batch Description", "Batch Date", "Receive Date", and "Count". Two rows are visible: one with Batch # 4 and another with Batch # 5. A large blue arrow points upwards to the "Batch #" column. Below the table, there are buttons for "New", "Process", and "Delete". A "Close" button is in the bottom right corner.

Batch #	Batch Description	Batch Date	Receive Date	Count
4		04/25/2016	04/25/2016	1
5		04/27/2016	04/27/2016	1

Releasing Undeliverable Ballots

Use the Next/Previous buttons to locate the ballot you need to release. Once located, click **Delete** to remove the ballot from the batch.

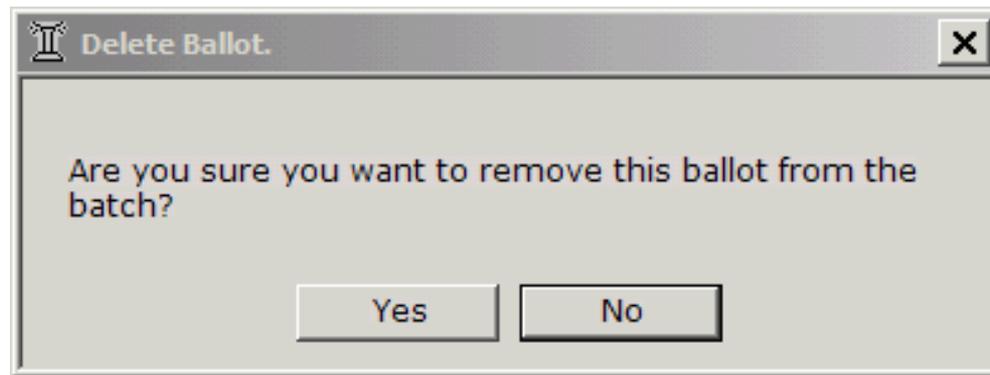
The screenshot shows a software window titled "Undeliverable Ballots" with a close button (X) in the top right corner. The window displays "Record 1 of 1" and a "Help" link. The interface is divided into several sections:

- Batch:** Contains fields for Election (51-Federal Primary Election 2016), Batch Description, Batch Date (04/27/2016), Received Date (04/27/2016), and Identifier.
- Ballot Label:** Includes an ID field and an "Add" button.
- Ballot Search:** Includes Name, Street, and City fields, along with a "Search" button.
- Voter Details:** Includes Name on Ballot (TEST, VOTER), Name in Record, Status (Active), and Status fields.
- Ballot Residential Address:** 20 N MAIN, JEFFERSON CITY, MT 59638.
- Current Residential Address:** (Empty field).
- Ballot Mail Address:** 10 TEST AVE, HELENA, MT 59601. Address Type: Civilian Overseas.
- Current Mail Address:** (Empty field).

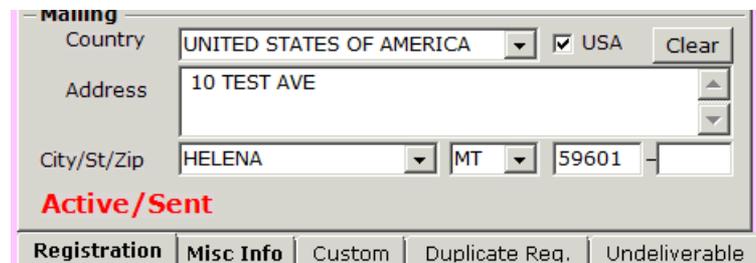
At the bottom of the window, there are two buttons: "Review Registration" and "Change Now". Below these are navigation buttons: "Delete", "First", "Previous", "Next", "Last", "View Ballots", "Voter Details", "Save", and "Close". A blue rectangular box highlights the "Delete", "First", "Previous", "Next", and "Last" buttons.

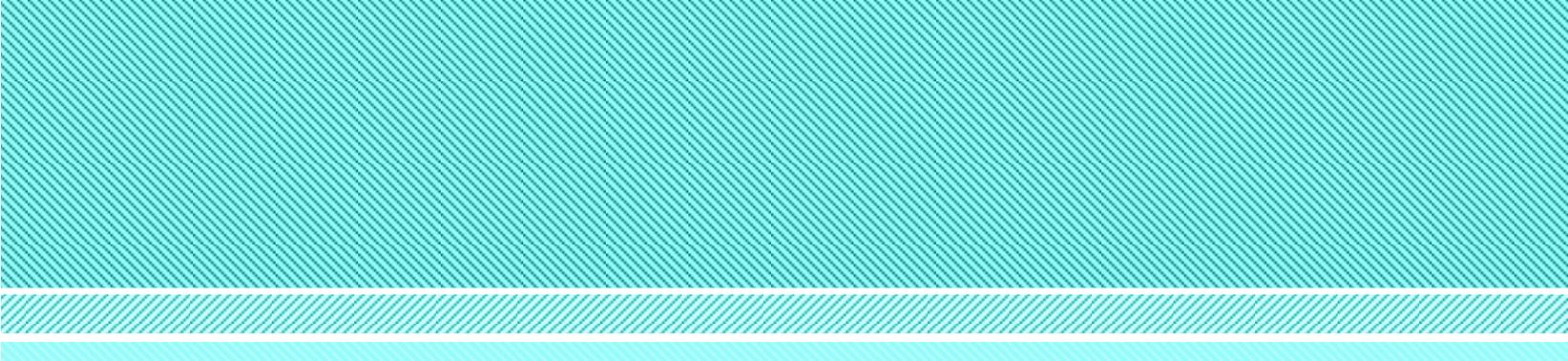
Releasing Undeliverable Ballots

You will receive a pop-up. Answer **Yes**.



The ballot will now be back in Active/Sent status.





Resending Undeliverable Ballots

RESEND

If you receive an updated mailing address for an undeliverable ballot, and the voter has confirmed the address, bring up the individual's record in Voter Registration to begin the re-send process.

Click on Election Menu and go to the Issue Ballot screen.

The screenshot shows the 'Voter Registration' application window. The 'Voter' tab is active, displaying a record for 'TEST VOTER' with Voter ID 45015998. The status is 'Active/Undeliverable'. The interface includes sections for 'Voting History', 'Residence', 'Mailing', and 'Registration'. The 'Registration' section shows the voter is 'Active - A' with a 'Last Verified Date' of 04/22/2016. The 'Voter Polling Locations' section shows the voter is registered at 'JEFFERSON CITY COMMUNITY HALL' in 'JEFFERSON' county, '06-75' precinct, '01.06' split. The 'Election' table shows a record for '51-Federal Primary E...' on 06/07/2016. The 'Districts' table lists various district types and codes.

Election	Late Reg Date	Date	Polling Places
51-Federal Primary E...	05/08/2016	06/07/2016	JEFFERSON CITY COMMUN

District Type	Code	Name
CONGRESSIONAL	CONG	CONGRESSIONAL
STATEWIDE	MT	Montana
PUBLIC SERVICE C...	PS 03	Public Service Commissioner, Distr
JUDICIAL	JD 05	Judicial District 5
SUPREME COURT J...	SCJ	SUPREME COURT JUSTICE
SENATE DISTRICT	SD 38	Senate District 38
HOUSE DISTRICT	HD 075	House District 75
COUNTYWIDE	22	Jefferson
LIBRARY	02	NORTH JEFFERSON COUNTY LIBRA
SCHOOL DISTRICT	HS-1	JEFFERSON HIGH SCHOOL DISTRIC

RESEND

Change the Ballot Type to **Resent-Undeliverable**. Select the **Label** and a **reason** for Reissue/Resend and then click **Print**.

Issue Ballot Request Voter Search Help

Election Name: 6/7/2016 51-Federal Primary Election 2016 Ballot Type: Issue

Current Ballots

Ballot Seq. #	County Tracking #	Sent	Received	Style	Precinct	Stage	Type
3	57	04/25/2...	04/27/2...	3	PREC.00	Undeliverable	Reissued

Print Label

With next Supplemental batch

Now

Select Label: Single Absentee Ballot Label

Reason For Reissuing/Resend the Ballot: Notified by elector to mail to different address

Void Ballot Range Change Sent Date Print RePrint Cancel

RESEND

Locate the ballot in the batch and then click **Delete** and answer **yes** to the pop-up and then select **Close**.

The screenshot displays the 'Undeliverable Ballots' application interface. The main window shows 'Record 1 of 1' with the following details:

- Batch:** Election: 51-Federal Primary Election 2016; Batch Description: [Empty]; Batch Date: 04/27/2016; Received Date: 04/27/2016; Identifier: [Empty]
- Ballot Label:** ID: [Empty]; Add: [Button]
- Ballot Search:** Name: [Empty]; Street: [Empty]; City: [Empty]; Search: [Button]
- Voter Details:** Name on Ballot: TEST, VOTER; Name in Record: [Empty]; Status: Active; Status: [Empty]
- Ballot Residential Address:** 20 N MAIN; JEFFERSON CITY, MT 59638
- Current Residential Address:** [Empty]
- Ballot Mail Address:** 10 TEST AVE; HELENA, MT 59601; Address Type: Civilian Overseas
- Current Mail Address:** [Empty]

At the bottom of the main window, there are buttons: Delete, First, Previous, Next, Last, View Ballots, Voter Details, Save, and Close. A blue arrow points from the 'Delete' button to a 'Delete Ballot' dialog box. The dialog box contains the text: 'Are you sure you want to remove this ballot from the batch?' and has 'Yes' and 'No' buttons. A second blue arrow points from the 'Yes' button back to the 'Close' button in the main window.

RESEND

You will be brought back to the Issue Ballot module, and will be able to **Enter Resent Details** and then click **Print**.

The screenshot shows the 'Issue Ballot Request' application window. The main window has a title bar with a logo and the text 'Issue Ballot Request'. Below the title bar, there are links for 'Voter Search' and 'Help'. The main area is divided into several sections:

- Election Name:** A text box containing '6/7/2'.
- Current Ballots:** A table with columns 'Ballot Seq. #' and 'Cour'. The first row contains '3' and '57'.
- Print Label:** A section with two radio buttons: 'With next Suppl...' (unselected) and 'Now' (selected).
- Reason For Reissuing/Resent the Ballot:** A dropdown menu with the selected option 'Invited by elector to mail to different address'.

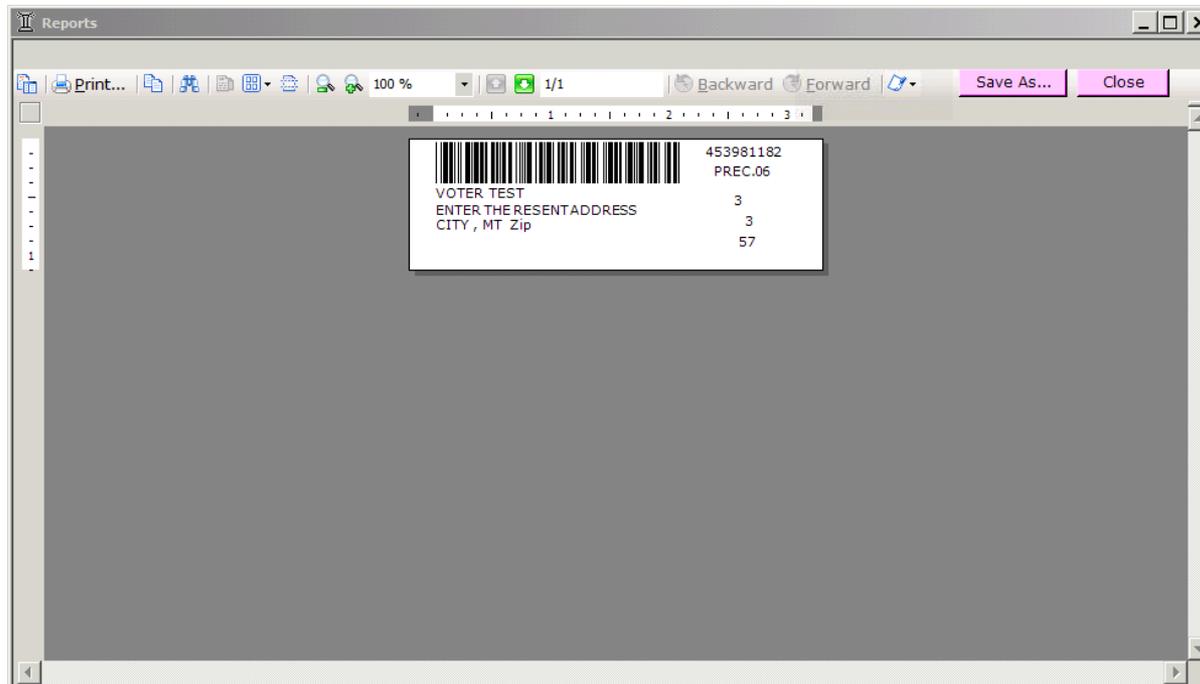
An 'Enter Resent Details' dialog box is open in the foreground. It has a title bar with a logo and the text 'Enter Resent Details'. The dialog box contains the following fields and controls:

- Resent Date:** A text box containing '04/27/2016'.
- Resent Address:** A section with a 'Country' dropdown menu set to 'UNITED STATES OF AMERICA' and a checked 'USA' checkbox. Below it is a large text box containing 'ENTER THE RESENT ADDRESS'.
- City/St/Zip:** Three dropdown menus: 'CITY', 'MT', and 'Zip'.
- Buttons:** 'Print' and 'Close' buttons at the bottom right.

At the bottom of the main window, there are buttons for 'Void Ballot Range', 'Change Sent Date', 'Print', 'RePrint', and 'Cancel'.

RESEND

The same ballot ID and sequence number will print with a new mailing address label. The ballot will be put back into Active/Sent status.



RESEND

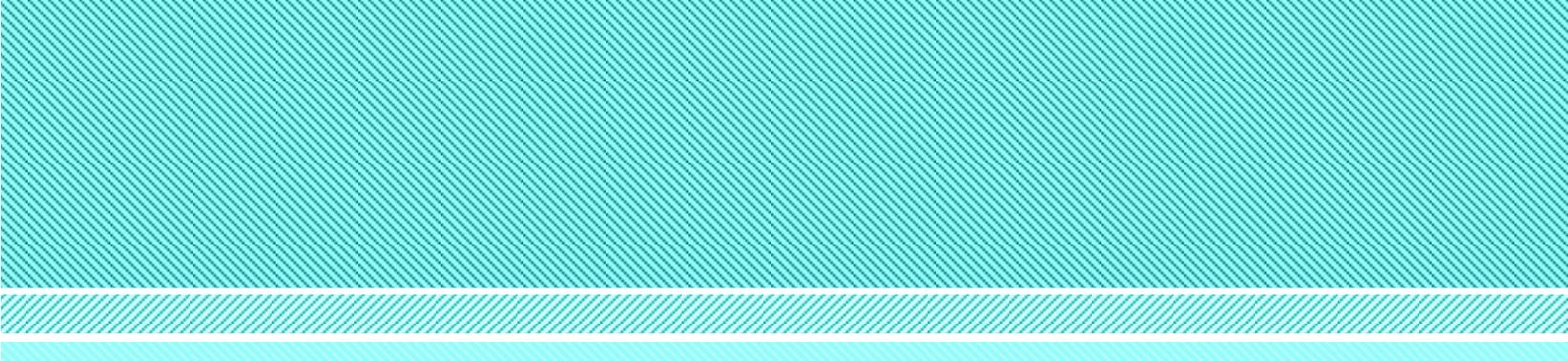
NOTE: If the address update has been confirmed by the voter as the new permanent mailing address, you must still update the mailing address in MT Votes in Voter Registration. (This should be done after the election so that a resync does not occur).

USPS YELLOW STICKERS

If a ballot is returned undeliverable with a **USPS yellow sticker** that includes a forwarding address for the voter, the voter must confirm that USPS Address before the ballot is resent. If confirmation is received in writing, MT Votes can be updated with the new address.

If the ballot is for a UOCAVA voter, if FVAP does not provide an updated mailing address, you can resend the UOCAVA ballot to the USPS address, but do not update MT Votes unless the voter confirms the new mailing address in writing.

Confirmation could be from the signature envelope IF the signature envelope contains a label with the USPS address on it for the voter to confirm or if the voter indicates in writing the correct address.



**As always, please contact the
helpdesk if you have any questions.**

soshelpdesk@mt.gov

406.444.4296

866.541.6767