

# 2016 Montana Election Administrator Certification Training



**Montana Secretary of State Linda McCulloch**  
**Elections and Government Services**  
**Sos.mt.gov    [soselections@mt.gov](mailto:soselections@mt.gov)**

# Introduction

This training guide should be used as a basic guide to the common work flows of MT Votes. **You should follow along in your MT Vote Test Environment.**

The training should only be used to demonstrate MT Votes functionality.

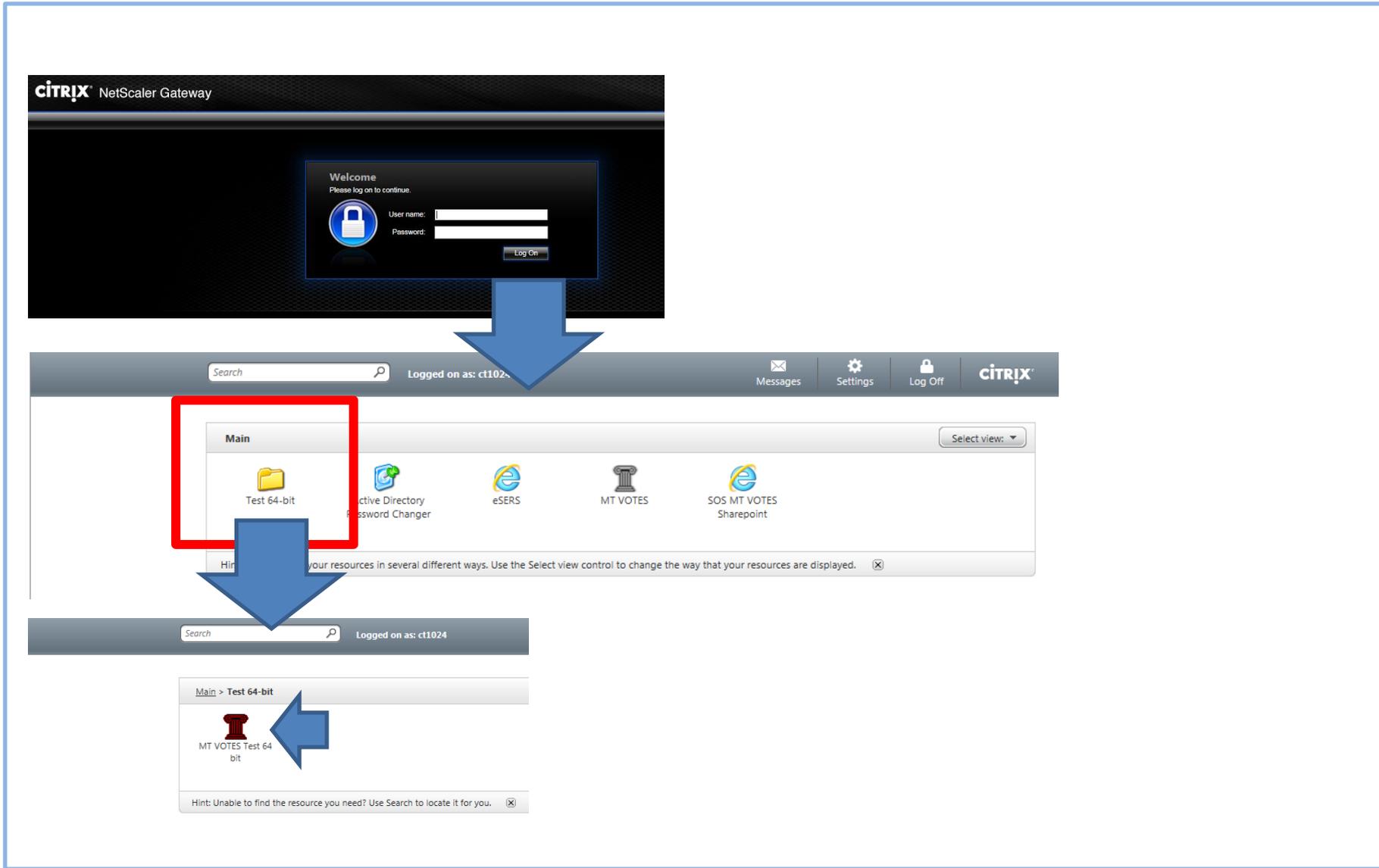
# Before we get started

This training may look like we are jumping around, but it is set up to mimic the normal flow of an election year. It starts with Absentee Maintenance (which takes place in January of even years) and ends with closing an election (end of the year).

The flow of this training will be as follows:

1. **Absentee Maintenance** – Vickie Zeier
2. **Voter Registration** (including Late Registration and Voter Merge/Unmerge)
3. **Election Management** – Creating an election, adding races, pulling absentee voters into the election and printing labels.
4. **Ballot Processing** – Audrey Dufrechou
5. **Provisional Ballot Module** – Vickie Zeier
6. **Election Management** – Printing official register, processing the official register, Election results, Reports, and closing the election.
7. **Petitions** – Charlotte Mills

# Logging into MT Votes Test



# Getting started

This is a training guide, please ensure that you are in MT Votes Test. If your MT Votes is not bright pink, you are in the wrong environment.

# ABSENTEE MAINTENANCE

- Creating a batch
- Recommendations
- Absentee Reports

# Absentee Maintenance

The absentee maintenance module is a useful module when entering in Absentee Confirmation cards. It allows you to enter batches of Absentee requests at once, rather than having to open each voters record and add a request.

This module is useful for any county that receives large amounts of confirmations at one time.

# Absentee Maintenance

From the main screen of MT Votes click on the Absentee Maintenance Module.

The screenshot displays the MT VOTES web application interface. At the top, the user is identified as 'User: sjolund, casey' and the county as 'County: Lewis Clark', with the date 'Date: 12/15/2015'. The page title is 'Environment Test Environment MT VOTES'. The main navigation menu is organized into several categories:

- Voters**
  - Voter Registration
  - Voter Search
  - Voter Merge
  - Batch Scan
  - Commit Batch
- Elections**
  - Election Management
  - Election Calendar
  - Ballot Processing
  - Districts & Precincts
  - Election Workers
  - Absentee Maintenance**
  - Provisional Ballots
- Administration**
  - System Configuration
  - User Administration
  - Address Library
  - Legal Address Library
  - Messaging
  - Document Templates
  - Load External Data
  - NVRA Process
- Reports**
  - Reports & Labels
  - Schedule Jobs
  - Batch Management
- Agency Search**
  - Potential Felons
  - Potential Deceased
- Petitions**
  - Petitions
- Pre-Registration**
  - Online Pre-Registration

A large white arrow points to the 'Absentee Maintenance' link under the 'Elections' category. At the bottom of the page, a message is displayed: '12/4/2015 Message Sent to other County for Merge Approval: Lewis & Clark County is trying to merge Voter...'

# Absentee Maintenance

When the module opens, ensure that all the populated information is correct for everyone in your group of ballots.

If the data is not correct for an individual you will want to manually change that before scanning or entering the voter ID.

**Note:** If you are entering requests in before 02/01/16, ensure that your start date is 02/01/16.

The screenshot shows a software window titled "Absentee Maintenance". The interface is divided into several sections:

- Form Fields:**
  - Voter ID:** A text input field followed by an "Add" button.
  - Date Range:** Two date pickers labeled "From" and "To". The "From" date is 12/15/2015 and the "To" date is 1/31/2016.
  - Absentee Type:** A dropdown menu currently set to "Absentee List".
  - Date Requested:** A text input field containing "12/15/2015".
  - Absentee Status:** A dropdown menu currently set to "Absentee List".
  - Absentee Application Source:** A dropdown menu currently set to "Mail".
  - Issue Method:** A dropdown menu currently set to "Mailing".
  - Fax Number:** An empty text input field.
  - E-mail:** An empty text input field.
- Table:** A table with the following columns: "#", "Voter ID", "Name", and "Signature". The table body is currently empty.
- Buttons:** "Create Absentee", "Delete", and "Cancel" buttons are located at the bottom of the window.

# Absentee Maintenance

Once you have verified all the information is correct, you can start entering/scanning in voter ID's. After each ID is entered, click the **Add** button

The screenshot shows a software window titled "Absentee Maintenance" with a pink background. At the top right is a "Help" link. The main area contains several input fields and buttons:

- Voter ID:** A text input field followed by an "Add" button.
- From:** A date selector with dropdowns for month (12), day (15), and year (2015).
- To:** A date selector with dropdowns for month (1), day (31), and year (2016).
- Absentee Type:** A dropdown menu currently showing "Absentee List".
- Date Requested:** A text input field containing "12/15/2015".
- Absentee Status:** A dropdown menu currently showing "Absentee List".
- Absentee Application Source:** A dropdown menu currently showing "Mail".
- Issue Method:** A dropdown menu currently showing "Mailing".
- Fax Number:** An empty text input field.
- E-mail:** An empty text input field.

Below the input fields is a table with the following headers: #, Voter ID, Name, and Signature. The table body is currently empty.

At the bottom of the window are three buttons: "Create Absentee", "Delete", and "Cancel".

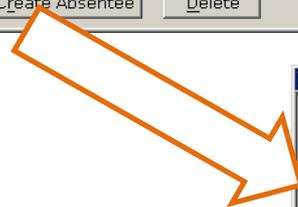


# Absentee Maintenance

Once you have at least one entry in the list, and you have verified the signature(s) from each voter's confirmation, you can click on the **Create Absentee** button to create the entry for every voter showing.

You will be prompted to print an Absentee Maintenance report. **This report cannot be regenerated.** Click yes only when you are ready to print the report.

#	Voter ID	Name	Signature
1	450022443	WASHINGTON, GEORGE	George Washington



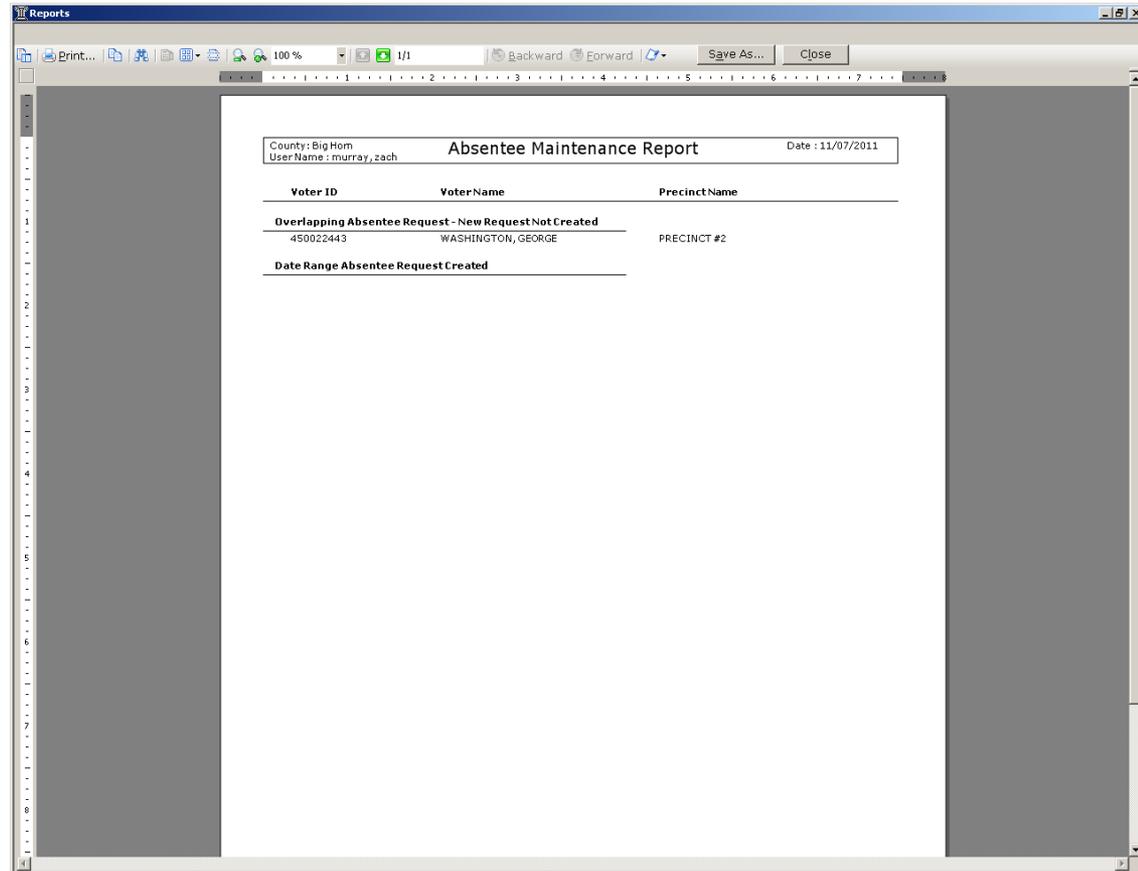
This report cannot be recreated, must print or save the report now. This will create absentee requests. Do you want to continue?

Yes No

# Absentee Maintenance - Reports

The Absentee maintenance Report will generate automatically when you click Create Absentee.

This report cannot be regenerated.



County: Big Horn  
User Name : murray, zach

**Absentee Maintenance Report** Date : 11/07/2011

<b>Voter ID</b>	<b>Voter Name</b>	<b>Precinct Name</b>
<b>Overlapping Absentee Request - New Request Not Created</b>		
450022443	WASHINGTON, GEORGE	PRECINCT #2
<b>Date Range Absentee Request Created</b>		

# Absentee Maintenance - Reports

If you close out of the Absentee Maintenance Report without printing, an alternative report to run is the E-015 report, although it takes a little more work.

You must specify a date range for the date of the absentee creation.

If you entered multiple dates in one batch in the Absentee Maintenance module you will have to run multiple reports to get the same results that would display on the absentee Maintenance Report.

The screenshot shows the 'Reports' application window with the following sections:

- County:** Big Horn
- Election:** 22 TEST SPECIAL ELECTION 2011 - 11/08/2011
- Precincts:** District: Precincts.  All (Deleted precincts will be included on report). List:  PRECINCT #1 - 1,  PRECINCT #10 - 10,  PRECINCT #14 - 14,  PRECINCT #15 - 15.
- Range:** From: PRECINCT #1 - 1
- Absentee Type:**  All Absentee Types,  Civilian Overseas,  Election Specific,  Military Domestic.
- NVRA Notice Type:**  1st Notice,  2nd Notice,  Cancellation of voters.
- Date Range:** From: [ ] To: [ ]
- Party:**  All,  Democratic,  Republican,  No Party.
- Batch Number:** [ ]
- Offices:** [ ]
- Candidate:** [ ]
- Budget Group:** All
- Table:**

Code	Name	Sort Order
E-011	Absentee Batch Report	
E-012	List of Voters In Election	
E-013	Permanent Absentee with No Ballot Request	
E-014	NVRA Report	
E-015	Absentee Type Date Range Report	
- Buttons:** Export, Cancel, Run Report

# Absentee Maintenance

## - Recommendations

- Create a uniform number of forms in one batch.
- If a voter doesn't appear on the Absentee Maintenance Report but they were entered in the Absentee Maintenance module you need to investigate further.
- Electors who request ballots to be mailed to another address cannot be entered into this module. You must enter them through Voter Registration.
- Inactive or Provisionally registered electors cannot be entered into this module until you change their status.

# VOTER MODULE

- Voter Registration
  - Add Absentee Request
- Late Registration
- Voter Merge

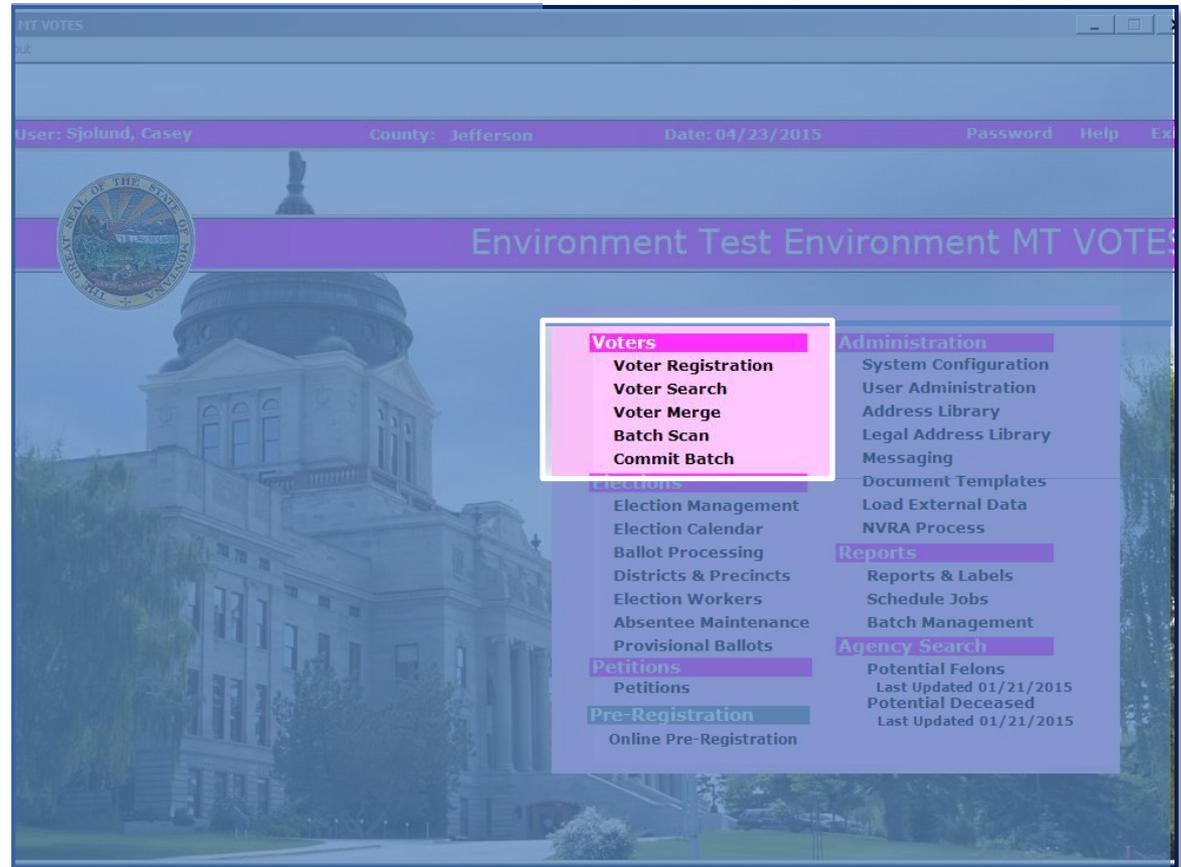
# Voter Registration

The **Voters** module is where you can create new voter records and edit existing voters.

This training will help demonstrate how to register a voter during both regular registration as well as the late registration period.

This training will also cover the Voter Merge module.

To register your new voter click on **Voter Registration**.



# Voter Registration

The Voter Registration screen will open. When it first opens there are only two things that you can do.

- Search for a voter by **Voter ID** or **State ID**.
- Create a **New** voter.

To create a new voter, click **New**.

The screenshot shows a web-based application window titled "Voter Registration". The interface is divided into several sections:

- Header:** Includes a menu bar with "Voter", "Print", "Elections", "Petitions", "Imaging", and "Address". Below the menu is a toolbar with buttons for "New", "Save", "Clear", "Search", and "Process Batch".
- Form Fields:** A row of input fields for "Voter ID", "State ID", "SSN", "Birth Date", "Age", "Gender", "Last Name", "First Name", "MI", and "Suffix".
- Residence Section:** Contains dropdown menus for "Standard", "NCOA", "CASS", "Migration", "Comments", and "Election Worker". Below are fields for "House #", "Suffix", "Pre Dir", "Street Name", "Type", "Post Dir", "Unit Type", "City/St/Zip", "County", "Precinct", and "Split".
- Mailing Section:** Includes a "Country" dropdown, a "USA" checkbox, and an "Address" field.
- Registration Section:** Features tabs for "Registration", "Misc Info", "Custom", "Duplicate Req.", and "Undeliverable". It contains fields for "Party" (set to "Democrat"), "Last Verified Date", "Status", "Reason", "Source of Registration", "Old Voter ID", "County Reg Date", "Vote Eligible", and "Last Voted Date". There are also checkboxes for "No Signature", "Confidential", "Reveal", and "US Citizen".
- Comments Section:** A text area at the bottom left for entering notes.
- Voter Polling Locations Section:** A blue-shaded area on the right with fields for "Precinct", "Split", and "Polling Place", along with a "View Image" button.
- Election Section:** A table with columns "Election", "Late Reg Date", "Date", and "Polling Places".
- Districts Section:** A table with columns "District Type", "Code", and "Name".

# Voter Registration

To start out the voter registration process, you will need to add either a **State ID** or **SSN**. Since we are in test, you can use made up data in either of these fields. **Do not use made up data in production.**

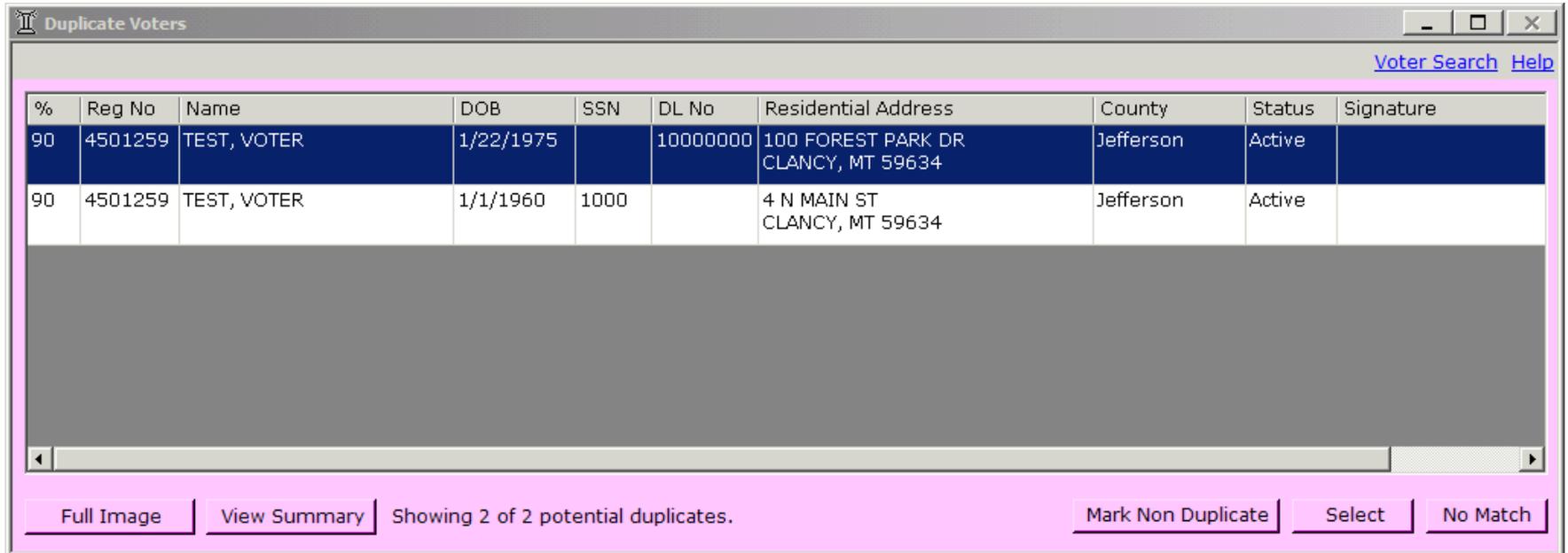
Enter the ID, DOB and Name of the test voter and tab past the suffix field.

**Important:** When navigating in MT Votes, always use the TAB key. When you use TAB it causes the system to refresh the data.

The screenshot shows a web application window titled "Voter Registration". The interface is divided into several sections:

- Header:** Includes a menu bar with "Voter", "Print", "Elections", "Petitions", "Imaging", and "Address". Below the menu is a toolbar with buttons for "New", "Save", "Clear", "Search", and "Process Batch".
- Form Fields:** A row of input fields for "Voter ID", "State ID", "SSN", "Birth Date", "Age", "Gender" (dropdown), "Last Name", "First Name", "MI", and "Suffix".
- Residence Section:** Contains dropdowns for "Standard", "NCOA", "CASS", "Migration", "Comments", and "Election Worker". Below are fields for "House #", "Suffix", "Pre Dir", "Street Name", "Type", "Post Dir", "Unit Type", "City/St/Zip", "County" (set to "JEFFERSON"), "Precinct", and "Split".
- Mailing Section:** Includes "Country" (set to "UNITED STATES OF AMERICA"), a checked "USA" checkbox, and "Address" and "City/St/Zip" fields.
- Registration Section:** Features tabs for "Misc Info", "Custom", "Duplicate Req.", and "Undeliverable". It includes fields for "Party" (set to "No Party"), "Last Verified Date", "Status" (set to "Provisional - N"), "Reason" (set to "ID Verification - ID"), "Source of Registration", "Old Voter ID", "County Reg Date" (set to "04/24/2015"), "Vote Eligible", "Last Voted Date", and checkboxes for "No Signature", "Confidential", "Reveal", and "US Citizen".
- Voter Polling Locations Section:** Includes fields for "Precinct", "Split", and "Polling Place", along with a "View Image" button.
- Election Section:** A table with columns: "Election", "Late Reg Date", "Date", and "Polling Places".
- Districts Section:** A table with columns: "District Type", "Code", and "Name".
- Comments Section:** A text area at the bottom for entering notes.

# Voter Registration



The screenshot shows a window titled "Duplicate Voters" with a table of two potential duplicate voter records. The table has columns for percentage, registration number, name, date of birth, social security number, driver's license number, residential address, county, status, and signature. Below the table are buttons for "Full Image", "View Summary", "Mark Non Duplicate", "Select", and "No Match". A status bar at the bottom indicates "Showing 2 of 2 potential duplicates."

%	Reg No	Name	DOB	SSN	DL No	Residential Address	County	Status	Signature
90	4501259	TEST, VOTER	1/22/1975		10000000	100 FOREST PARK DR CLANCY, MT 59634	Jefferson	Active	
90	4501259	TEST, VOTER	1/1/1960	1000		4 N MAIN ST CLANCY, MT 59634	Jefferson	Active	

Showing 2 of 2 potential duplicates.

Buttons: Full Image, View Summary, Mark Non Duplicate, Select, No Match

The Duplicate Voters window will pop up if any voter is flagged as a potential duplicate voter. For this training exercise you want to register a new voter, so you will want to select **No Match**. Before you select No Match, let's look at some of the other functionality.

**Mark Non Duplicate** should be used, if the voter is not a duplicate, when this window pops up. This will flag the voter as a no match so they won't appear as potential matches on reports going forward.

**Select** is used when a record is a match and you want to use the existing record.

Please select **No Match**.

# Voter Registration

You will now be able enter the **Residence** information in this tab.

Addresses added into MT Votes must be broken up by specific field (1 West First Street South).

Remember, use the TAB key to maneuver between fields.

Once you TAB past the **Post Dir** field, the address library screen will pop up.

The screenshot shows a web-based voter registration application. At the top, there is a navigation bar with links for Voter, Print, Elections, Petitions, Imaging, and Address. A red error message states: "The voter could not be verified through MVD data." Below this is a header with buttons for New, Save, Clear, Search, and Process Batch. The main form contains several sections:

- Personal Information:** Fields for Voter ID, State ID (011111111), SSN, Birth Date (01/01/1940), Age (75), Gender, Last Name (TEST), First Name (VOTER), MI, and Suffix.
- Residence:** A tabbed section with sub-tabs for Prev Registration, Absentee, Contacts, and History. It includes dropdowns for Standard, NCOA, CASS, Migration, Comments, and Election Worker. Fields include House #, Suffix, Pre Dir, Street Name, Type, Post Dir, Unit Type, City/St/Zip (JEFFERSON), and Precinct. A "Split" button is also present.
- Mailing:** Fields for Country (UNITED STATES OF AMERICA), USA (checked), and Address.
- Registration:** Fields for Party (No Party), Last Verified Date, Status (Provisional - N), Reason (ID Verification - ID), Source of Registration, Old Voter ID, County Reg Date (04/24/2015), Vote Eligible (04/24/2015), Last Voted Date, and checkboxes for No Signature, Confidential, and US Citizen (checked).
- Right Panel:** Contains "Voter Polling Locations" with fields for Precinct, Split, and Polling Place, and a "View Image" button. Below it are tables for "Election" and "Districts".

# Voter Registration

The **Address library** is where you will select (or add) an address to use for this voter.

Addresses in the Address library are associated with splits, which in turn are associated with Precincts and with Districts. You want to make sure that you select the correct address range or else the voter could get a wrong ballot.

Once you choose an address from the library, you can click **Select**.

The screenshot shows the 'Address Library' software interface. At the top, it says 'Please select Residential Address from the Following.' Below this is a 'Selection Criteria' section with various dropdown menus and input fields. The 'Search Result' section displays a table with columns for From, To, Type, Pre, Street Name/Type, Post, Unit Type, Unit #, City, Zip, District, Precinct, Split, and Res Add. The table contains four rows of data.

From	To	Type	Pre	Street Name/Type	Post	Unit Type	Unit #	City	Zip	District	Precinct	Split	Res Add
1	343	All	N	MAIN				JEFFER...	596...	Jeffer...	PREC....	01.06	YES
1	27	Odd	N	MAIN ST				CLANCY	596...	Jeffer...	PREC....	01.07	YES
1	413	All	N	MAIN ST				WHITE...	597...	Jeffer...	PREC....	02.02	YES
1	13	All	S	MAIN ST				CLANCY	596...	Jeffer...	PREC....	01.07	YES

If you need to add an address range, ensure that you know what split and precinct it will be added to.

# Voter Registration

The rest of the information in the residence tab has auto filled based on your selection on the Address Library screen.

From here you can enter a mailing address if they entered one.

The screenshot shows a web-based voter registration application. At the top, there are navigation tabs: Voter, Print, Elections, Petitions, Imaging, and Address. Below this is a menu bar with options: New, Save, Clear, Search, and Process Batch. The main form is divided into several sections:

- Personal Information:** Fields for Voter ID, State ID (011111111), SSN, Birth Date (01/01/1940), Age (75), Gender, Last Name (TEST), First Name (VOTER), MI, and Suffix.
- Residence:** Includes a dropdown for 'Standard' (with links for NCOA, CASS, Migration, Comments, Election Worker), and fields for House # (1), Suffix, Pre Dir (N), Street Name (MAIN), Type, Post Dir, Unit Type, City/St/Zip (JEFFERSON CITY, MT, 59638), County (JEFFERSON), Precinct (PREC.06-7), and Split (01.06).
- Mailing:** Fields for Country (UNITED STATES OF AMERICA), USA checkbox (checked), and an empty Address field.
- Registration:** Includes Party (No Party), Last Verified Date, Status (Provisional - N), Reason (ID Verification - ID), Source of Registration, Old Voter ID, County Reg Date (04/24/2015), Vote Eligible (04/24/2015), Last Voted Date, and checkboxes for No Signature, Confidential, and US Citizen (checked).
- Tables:** Two empty tables are visible: 'Voter Polling Locations' with columns for Precinct, Split, and Polling Place; and 'Districts' with columns for District Type, Code, and Name.

# Voter Registration

Once done in the Residence tab, you will want to work on the **Registration** tab.

The screenshot shows a web-based voter registration application. At the top, a red error message states: "The voter could not be verified through MVD data." Below this is a header bar with buttons for "New", "Save", "Clear", "Search", and "Process Batch". The main data entry area includes fields for Voter ID, State ID (011111111), SSN, Birth Date (01/01/1940), Age (75), Gender, Last Name (TEST), First Name (VOTER), MI, and Suffix.

The interface is divided into several tabs: Residence, Prev Registration, Absentee, Contacts, and History. The Residence tab is active, showing a dropdown menu for "Standard" and a "Clear" button. Below this are fields for House #, Suffix, Pre Dir, Street Name, Type, Post Dir, Unit Type, City/St/Zip, and County (JEFFERSON). A "Split" button is also present.

The Mailing tab is also visible, with fields for Country (UNITED STATES OF AMERICA), USA (checked), and Address.

The Registration tab is highlighted in pink and contains the following information:

- Party: No Party
- Status: Provisional - N
- Reason: ID Verification - ID
- Source of Registration: [Empty]
- Old Voter ID: [Empty]
- County Reg Date: 04/24/2015
- Vote Eligible: 04/24/2015
- Last Voted Date: [Empty]
- Checkboxes: No Signature, Confidential, US Citizen (checked)

There are also checkboxes for "MVD Verified" and "SSA Verified", and a "Verify" button. A "Comments" field is at the bottom.

On the right side, there are sections for "Voter Polling Locations" (Precinct, Split, Polling Place) and "Election" (table with columns: Election, Late Reg Date, Date, Polling Places). Below that is a "Districts" table with columns: District Type, Code, Name.

# Voter Registration

The Registration tab is a very important area of the voter record.

The **Status** field for newly registered voters will be: Active, Pending or Provisional.

Since you are using made up information, the record will not automatically verify. The voter will be brought over as provisional. In order to continue the training, you will need to mark them as Active.

The screenshot shows a web-based form for voter registration. The form is divided into several tabs: 'Registration' (selected), 'Misc Info', 'Custom', 'Duplicate Req.', and 'Undeliverable'. The 'Registration' tab contains the following fields and controls:

- Party:** A dropdown menu set to 'No Party'.
- Last Verified Date:** An empty text input field.
- Status:** A dropdown menu set to 'Provisional - N'.
- Reason:** A dropdown menu set to 'ID Verification - ID'.
- Source of Registration:** An empty dropdown menu.
- Verify:** A button located to the right of the 'Source of Registration' field.
- Old Voter ID:** An empty text input field.
- County Reg Date:** A text input field containing '04/24/2015'.
- Vote Eligible:** A text input field containing '04/24/2015'.
- Last Voted Date:** An empty text input field.
- Checkboxes:** 'No Signature' (unchecked), 'Confidential' (unchecked), and 'US Citizen' (checked).
- Reveal:** A button located below the 'Confidential' checkbox.

At the bottom of the form is a 'Comments' section with a text area and scroll arrows.

The **Source of Registration** should be set to what ever style of registration form that you received.

For newly registered voters the **County Reg Date** and **Vote Eligible** date will autofill based on the System date.

Either the **MVD/SSA** box will need to be checked to continue for newly registered voters.

# Voter Registration- New Enhancement

A quick word about the **MVD/SSA** boxes. Starting in 2016, the system will automatically try to match a DLN and/or the last four of the SSN. If the system is unable to verify the provided identification, you will now be prompted with a window that will allow the user to attempt to enter different combinations of data (ex, Bill, William, Billy, Will,etc) to get the voter to verify.

That's right, you will no longer have to leave the system to verify a voter.

# Voter Registration

The **Prev Registration** tab is where you will enter the voters previous registration information, if any.

This information is very important as the Secretary of State uses this information to notify other states of people who have moved into Montana from their state. Without this information, it would be possible for a person to be registered in two different states.

The screenshot shows a web-based application window titled "Voter Registration". The interface includes a menu bar with options like "Voter", "Print", "Elections", "Petitions", "Imaging", and "Address". Below the menu is a toolbar with buttons for "New", "Save", "Clear", "Search", and "Process Batch". The main form is divided into several sections:

- Header Fields:** Voter ID, State ID (011111111), SSN, Birth Date (01/01/1940), Age (75), Gender, Last Name (TEST), First Name (VOTER), MI, and Suffix.
- Residence Tab:** Contains fields for "Prev Name" (Last Name: TEST, First Name: VOTER, Middle Name, Suffix), "Prev County" (dropdown), "Prev State" (dropdown), "Address" (text area), "City/St/Zip" (text area), and "Date of Birth" (01/01/1940). There is a checkbox for "Not Provided" and a note: "NOTE: If provided, Out-of-State counties must be typed in the Prev County field."
- Registration Tab:** Includes "Party" (No Party), "Status" (Provisional - N), "Reason" (ID Verification - ID), "Source of Registration" (dropdown), "Old Voter ID", "Vote Eligible" (04/24/2015), "County Reg Date" (04/24/2015), "Last Verified Date", "Last Voted Date", and checkboxes for "No Signature", "Confidential", "MVD Verified", "SSA Verified", and "US Citizen".
- Right Panel:** Contains sections for "Voter Polling Locations" (Precinct, Split, Polling Place), "Election" (table with columns: Election, Late Reg Date, Date, Polling Places), and "Districts" (table with columns: District Type, Code, Name).

This field is required. If the voter failed to provide previous registration, you must click the Not provided box. You will be unable to save this record until this tab is complete. Once you save this record you can not access it again.

# Voter Registration

Occasionally a user will have to reactivate a cancelled voter and that voter will have indicated that they were registered in another state. When you reactivate a voter you will not have access to the Previous Registration tab, so you can simply email a copy of the voter registration card and email [soselections@mt.gov](mailto:soselections@mt.gov). we will then take that registration information and get it to the appropriate jurisdictions.

# Voter Registration

After you have entered previous registration information, you can now **Save** the voter record.

The screenshot shows a software window titled "Voter Registration" with a menu bar containing "Voter", "Print", "Elections", "Petitions", "Imaging", and "Address". The main interface is divided into several sections:

- Menu Bar:** "New", "Save" (highlighted in yellow), "Clear", "Search", "Process Batch".
- Header Fields:** Voter ID, State ID (011111111), SSN, Birth Date (01/01/1940), Age (75), Gender (dropdown), Last Name (TEST), First Name (VOTER), MI, Suffix.
- Residence Section:** Includes tabs for "Prev Registration", "Absentee", "Contacts", and "History". Fields include "Prev Name" (Last Name: TEST, First Name: VOTER, Middle Name, Suffix), "Prev County" (dropdown), "Prev State" (dropdown), "Address" (text area), "City/St/Zip" (dropdowns), and "Date of Birth" (01/01/1940). A "Not Provided" checkbox is present. A note states: "NOTE: If provided, Out-of-State counties must be typed in the Prev County field."
- Registration Section:** Includes tabs for "Misc Info", "Custom", "Duplicate Req.", and "Undeliverable". Fields include "Party" (No Party dropdown), "Last Verified Date", "Status" (Provisional - N dropdown), "Reason" (ID Verification - ID dropdown), "Source of Registration" (dropdown), "Verify" button, "Old Voter ID", "County Reg Date" (04/24/2015), "Vote Eligible" (04/24/2015), "Last Voted Date", "No Signature", "Confidential", "Reveal" button, and "US Citizen" (checked checkbox).
- Voter Polling Locations Section:** Includes "View Image" button, "Precinct", "Split", and "Polling Place" fields.
- Election Section:** A table with columns: Election, Late Reg Date, Date, Polling Places.
- Districts Section:** A table with columns: District Type, Code, Name.
- Comments Section:** A text area at the bottom.

# Voter Registration

If the voter provided contact information you can enter that data into the contact tab.

The screenshot displays a web-based voter registration system. At the top, there are navigation links: Voter, Print, Elections, Petitions, Imaging, Address, and a Help link. Below this is a toolbar with buttons for New, Save, Clear, Search, and Process Batch. The main data entry area includes fields for Voter ID, State ID (011111111), SSN, Birth Date (01/01/1940), Age (75), Gender, Last Name (TEST), First Name (VOTER), MI, and Suffix. A tabbed interface is visible, with 'Contacts' selected. The 'Contacts' tab contains a table with columns for Contact Type, Value, and Unlisted. The 'Registration' tab is also visible, showing fields for Party (No Party), Status (Active - A), Reason, Source of Registration (DMV - 01), Old Voter ID, County Reg Date (04/24/2015), Vote Eligible (04/24/2015), Last Voted Date, and checkboxes for No Signature, Confidential, and US Citizen. Other tabs include Residence, Prev Registration, Absentee, and History. On the right side, there are sections for Voter Polling Locations (Precinct, Split, Polling Place) and Election (table with columns: Election, Late Reg Date, Date, Polling Places). At the bottom right, there is a Districts table with columns: District Type, Code, Name.

Contact Type	Value	Unlisted
Home Phone	(555)555-5555	<input type="checkbox"/>
Office Phone		<input type="checkbox"/>
Cell Phone		<input type="checkbox"/>
Email		<input type="checkbox"/>
Pager		<input type="checkbox"/>
Fax		<input type="checkbox"/>

Election	Late Reg Date	Date	Polling Places

District Type	Code	Name

# Voter Registration – Adding an Absentee Request

To add an absentee request, click on the Absentee tab.

You **must** add an absentee Status before adding an absentee request (NEW 2016!) unless they are Election Specific.

The screenshot shows the 'Voter Registration' software interface. At the top, a message states 'Voter record successfully saved, Voter number is 450144644'. Below this, there are fields for Voter ID (450144644), State ID (011111111), SSN, Birth Date (01/01/1940), Age (75), Gender, Last Name (TEST), First Name (VOTER), MI, and Suffix. The 'Residence' tab is selected, and the 'Absentee' sub-tab is active. A table with columns 'Dates/Elections', 'Absentee ...', and 'Address' is visible. Below the table, the 'Absentee Status' dropdown menu is open, showing options: 'Absentee List', 'UOCAVA', and 'EBR'. The 'Registration' tab is also visible, showing fields for Party (No Party), Status (Active - A), Reason, Source of Registration (DMV - 01), Old Voter ID, County Reg Date (12/21/2015), Vote Eligible (12/21/2015), Last Voted Date, and checkboxes for 'No Signature', 'Confidential', and 'US Citizen'. On the right side, there are sections for 'Voter Polling Locations' (Precinct: P20 - PCT 20, Split: P20.5, Polling Place: EAST HELENA CITY HALL) and 'Election' (Test Federal Primary... 12/20/2015, 01/19/2016, EAST HELENA CITY HALL). A 'Districts' table is also present, listing various district types and codes.

# Voter Registration – Absentee Statuses and the Types associated with them.

## A quick key:

A **blank** Absentee Status will result in the following available absentee types:

- Election Specific

**UOCAVA** Absentee Status will result in the following absentee types:

- Military Domestic
- Military Overseas
- Civilian Overseas

An **Absentee List** absentee status will result in the following absentee types:

- Absentee List
- Seasonal

An **EBR** status will result in the following absentee types:

- Absentee List
- Election Specific
- Seasonal
- Civilian Overseas
- Military Overseas
- Military Domestic

# Voter Registration

In order for the voter to get pulled into an election, they need an absentee type. So far you have just added a status.

To give them an active request, click the **Add** button.

Voter Registration  
Voter record successfully saved, Voter number is 450144644

New Save Clear Search Process Batch

Voter ID: 450144644, State ID: 0111111111, SSN: [Redacted], Birth Date: 01/01/1940, Age: 75, Gender: [Redacted], Last Name: TEST, First Name: VOTER, MI: [Redacted], Suffix: [Redacted]

**Residence** | Absentee | Contacts | History | Voting History

Dates/Elections	Absentee ...	Address

Absentee Status: Absentee List [Add] [Details] [Remove]

**Registration** | Misc Info | Custom | Duplicate Req. | Undeliverable

Party: No Party, Last Verified Date: [Redacted]  
Status: Active - A,  MVD Verified  
Reason: [Redacted],  SSA Verified  
Source of Registration: DMV - 01, Verify  
Old Voter ID: [Redacted], County Reg Date: 12/21/2015  
Vote Eligible: 12/21/2015, Last Voted Date: [Redacted]  
 No Signature,  Confidential, Reveal,  US Citizen

Comments: [Redacted]

**Voter Polling Locations**

Precinct: P20 - PCT 20 [View Image]  
Split: P20.5  
Polling Place: EAST HELENA CITY HALL

**Election**

Election	Late Reg Date	Date	Polling Places
Test Federal Primary...	12/20/2015	01/19/2016	EAST HELENA CITY HALL

**Districts**

District Type	Code	Name
CONGRESSIONAL	CONG	CONGRESSIONAL
STATEWIDE	MT	Montana
PUBLIC SERVICE C...	PS 05	Public Service Commissioner, Distri
SUPREME COURT J...	SCJ	SUPREME COURT JUSTICE
JUDICIAL	JD 01	Judicial District 1
SENATE DISTRICT	SD 42	Senate District 42
HOUSE DISTRICT	HD 084	House District 84
COUNTYWIDE	25	Lewis & Clark
WARD	02	CITY OF EAST HELENA WARD 1 SO
SCHOOL DISTRICT	01 HS EAST	HIGH SCHOOL 01 TRUSTEE 09

# Voter Registration

The Absentee Detail screen will open. From here you can select the Absentee Type (this is now directly related to the Absentee Status), From Date, Absentee Application Source and Issue Method.

You can choose to use the address on file, or add a new one.

Select Update and Save or Save and Issue Ballot.

The screenshot displays the 'Voter Registration - Absentee Detail' window. At the top, a message states 'Voter record successfully saved, Voter number is 450144644'. The main form area is divided into several sections:

- Absentee Type:** A dropdown menu set to 'Absentee List'.
- From/To:** Date pickers for 'From' (12/21/2015) and 'To' (1/31/2016).
- Absentee Application Source:** A dropdown menu set to 'Mail'.
- Issue Method:** A dropdown menu.
- Issue Details:** A text input field.
- Date Requested:** A date picker set to 12/21/2015.
- Political Party:** A dropdown menu.
- Use Address On File:** A checked checkbox.
- Address:** A text area containing '20 W MAIN ST EAST HELENA, MT 59635'.
- Print Application:** An unchecked checkbox.
- Absentee Address:** A section with a 'Country' dropdown (UNITED STATES OF AMERICA) and radio buttons for 'USA', 'EMAIL', and 'FAX'. Below are fields for 'Address' and 'City/St/Zip'.

At the bottom of the form, there are three buttons: 'Save and Issue Ballot', 'Update and Save', and 'Close'. The background shows a 'Voter Registration' window with various fields like Voter ID, State ID, SSN, Birth Date, Age, Gender, Last Name, First Name, MI, and Suffix. A table below the form lists 'Polling Places' with columns for 'Date' and 'Location', showing '19/2016' and 'EAST HELENA CITY HALL'.

# Voter Registration

You will be returned to the Absentee Tab, and can verify that the voter now has an active absentee request with a date range.

The screenshot displays a web-based voter registration system. At the top, a message states "Voter record successfully saved, Voter number is 450144644". Below this is a navigation bar with buttons for "New", "Save", "Clear", "Search", and "Process Batch". The main header shows fields for Voter ID (450144644), State ID (011111111), SSN, Birth Date (01/01/1940), Age (75), Gender, Last Name (TEST), First Name (VOTER), MI, and Suffix.

The "Residence" tab is selected, showing a table of absentee requests:

Dates/Elections	Absentee ...	Address
12/21/2015 To 1/31/...	Absentee ...	20 W MAIN ST , EAST HELENA

Below the table, the "Absentee Status" is set to "Absentee List" with "Add", "Details", and "Remove" buttons.

The "Registration" tab is also visible, showing fields for Party (No Party), Status (Active - A), Reason, Source of Registration (DMV - 01), Old Voter ID, County Reg Date (12/21/2015), Vote Eligible (12/21/2015), Last Voted Date, and checkboxes for "No Signature", "Confidential", "US Citizen", "MVD Verified", and "SSA Verified".

On the right side, the "Voter Polling Locations" section shows: Precinct (P20 - PCT 20), Split (P20.5), and Polling Place (EAST HELENA CITY HALL). Below this is an "Election" table:

Election	Late Reg Date	Date	Polling Places
Test Federal Primary...	12/20/2015	01/19/2016	EAST HELENA CITY HALL

At the bottom right, a "Districts" list is shown with columns for District Type, Code, and Name, including options like CONGRESSIONAL, STATEWIDE, PUBLIC SERVICE C..., SUPREME COURT J..., JUDICIAL, SENATE DISTRICT, HOUSE DISTRICT, COUNTYWIDE, WARD, and SCHOOL DISTRICT.

# VOTER REG – LATE REG

- Who is a late registrant?
- Adding an absentee request for a late registrant

# Voter Registration- Late Reg.

A **late registrant** is a voter registering, or updating registration information after the close of regular registration.

## Why does this matter?

Late Registrants **must** appear in the county election office (or location designated by the county election administrator) to register. These voters will be issued an absentee ballot on the spot. Late Registrants do not show up in the register and cannot vote at the polling place.

Late registrants are also tracked and entered with a specific vote eligible date and status in MT Votes. NOTE: if someone is registering or updating registration information after the close of regular registration, but does not want to be issued a ballot, they are not considered a late registrant and should be given a vote eligible date of the day after election day.

# Voter Registration – Late Reg

The Registration tab contains the fields that indicate whether a voter is a Late Registrant or a Regular Registrant.

**Late Registrants** should have a status of **Late Registration – LR**.

The screenshot shows a web-based voter registration application. At the top, a message states: "The voter could not be verified through MVD data." Below this is a header bar with buttons for "New", "Save", "Clear", "Search", and "Process Batch". The main form contains several sections:

- Personal Information:** Fields for Voter ID, State ID (011111111), SSN, Birth Date (01/01/1940), Age (75), Gender, Last Name (TEST), First Name (VOTER), MI, and Suffix.
- Residence:** Includes dropdowns for "Standard", "NCOA", "CASS", "Migration", "Election Comments", and "Worker". Fields for House #, Suffix, Pre Dir, Street Name, Type, Post Dir, Unit Type, City/St/Zip, and County (JEFFERSON).
- Mailing:** Fields for Country (UNITED STATES OF AMERICA), USA checkbox, Address, and City/St/Zip.
- Registration:** This section is highlighted with a pink border. It includes:
  - Party: No Party
  - Status: Late Registration - LR (indicated by a blue arrow)
  - Reason: [Empty]
  - Source of Registration: DMV - 01
  - Old Voter ID: [Empty]
  - County Reg Date: 06/09/2015
  - Vote Eligible: [Empty]
  - Last Voted Date: [Empty]
  - Checkboxes: No Signature, Confidential, US Citizen (checked)
- Voter Polling Locations:** Fields for Precinct, Split, and Polling Place, with a "View Image" button.
- Election:** A table with columns: Election, Late Reg Date, Date, and Polling Places.
- Districts:** A table with columns: District Type, Code, and Name.

At the bottom, there is a "Comments" field.

# Voter Registration

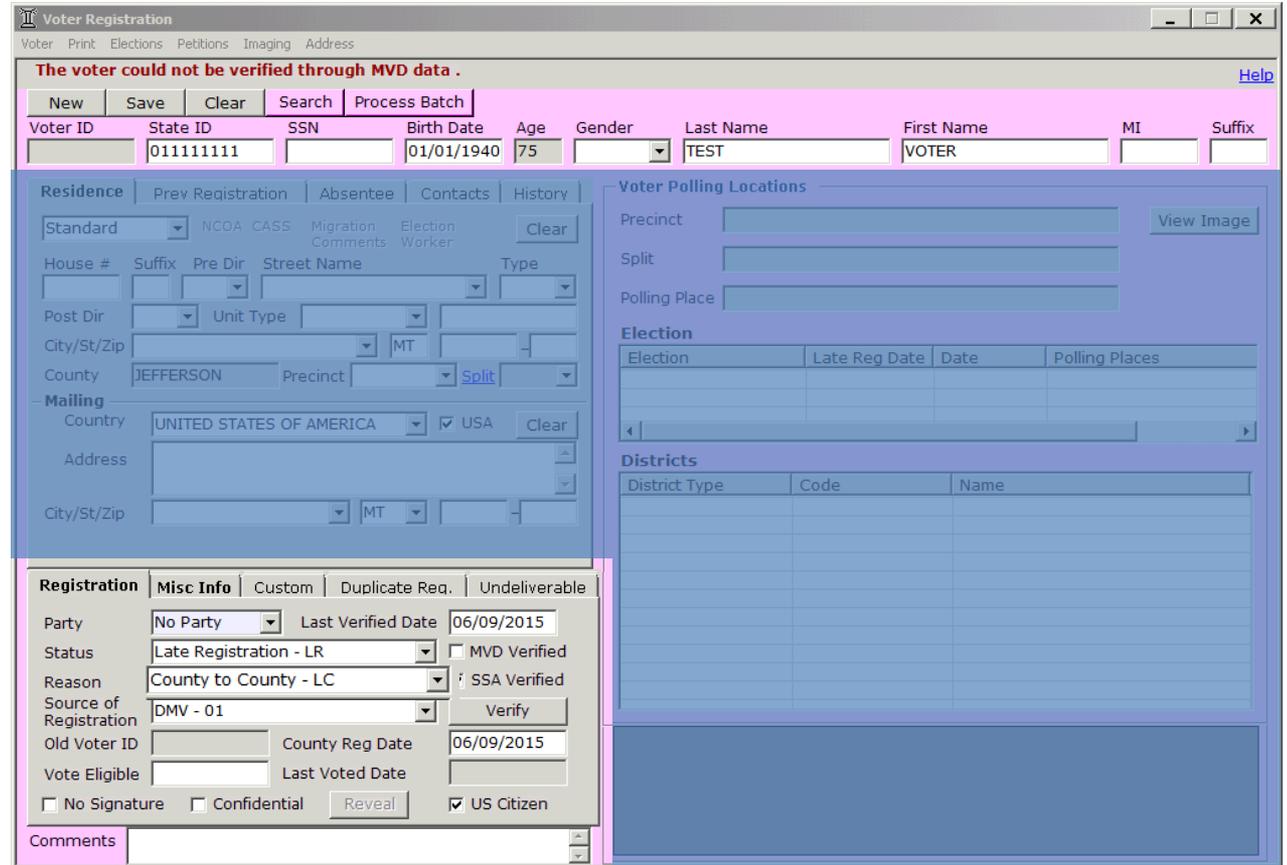
**Late Registrants** must have a (status) **Reason**.

The following reason codes can be used:

**New** (If the late registrant has never been in the system before.)

**County to County** this will be used if the voter was a transfer registrant from another county.

**Precinct to Precinct** is for voters who are moving within the same county.



The screenshot shows a web-based voter registration application. At the top, a message states: "The voter could not be verified through MVD data." Below this is a header bar with buttons for "New", "Save", "Clear", "Search", and "Process Batch". The main form contains several sections:

- Personal Information:** Fields for Voter ID, State ID (011111111), SSN, Birth Date (01/01/1940), Age (75), Gender, Last Name (TEST), First Name (VOTER), MI, and Suffix.
- Residence:** Includes dropdowns for "Standard", "NCOA", "CASS", "Migration", "Election Comments", and "Worker". Fields for House #, Suffix, Pre Dir, Street Name, Type, Post Dir, Unit Type, City/St/Zip, and County (JEFFERSON).
- Mailing:** Fields for Country (UNITED STATES OF AMERICA), USA checkbox, Address, and City/St/Zip.
- Registration:** A sub-section with tabs for "Registration", "Misc Info", "Custom", "Duplicate Req.", and "Undeliverable". It includes fields for Party (No Party), Last Verified Date (06/09/2015), Status (Late Registration - LR), Reason (County to County - LC), Source of Registration (DMV - 01), Old Voter ID, County Reg Date (06/09/2015), Vote Eligible, Last Voted Date, and checkboxes for "No Signature", "Confidential", "Reveal", and "US Citizen".
- Voter Polling Locations:** Fields for Precinct, Split, and Polling Place, with a "View Image" button.
- Election:** A table with columns for Election, Late Reg Date, Date, and Polling Places.
- Districts:** A table with columns for District Type, Code, and Name.

# Voter Registration

Their **Vote Eligible** date must be set to the Sunday before the close of regular registration. If you fail to give them this date MT Votes will not be able to issue a ballot to this voter.

**Voter Registration**

Voter Print Elections Petitions Imaging Address

**The voter could not be verified through MVD data .** [Help](#)

New Save Clear Search Process Batch

Voter ID	State ID	SSN	Birth Date	Age	Gender	Last Name	First Name	MI	Suffix
	011111111		01/01/1940	75		TEST	VOTER		

**Residence** | Prev Registration | Absentee | Contacts | History

Standard NCOA CASS Migration Election  
Comments Worker Clear

House # Suffix Pre Dir Street Name Type

Post Dir Unit Type

City/St/Zip MT

County JEFFERSON Precinct Split

**Mailing**

Country UNITED STATES OF AMERICA USA Clear

Address

City/St/Zip MT

**Voter Polling Locations**

Precinct View Image

Split

Polling Place

**Election**

Election	Late Reg Date	Date	Polling Places

**Districts**

District Type	Code	Name

**Registration** | Misc Info | Custom | Duplicate Req. | Undeliverable

Party No Party Last Verified Date 06/09/2015

Status Late Registration - LR MVD Verified

Reason County to County - LC SSA Verified

Source of Registration DMV - 01 Verify

Old Voter ID County Reg Date 06/09/2015

Vote Eligible Last Voted Date

No Signature  Confidential Reveal  US Citizen

Comments

# Voter Registration

Late Registrants must be issued an absentee ballot when they register\*.

To issue late registrants a ballot, click on the **Absentee Tab**.

The screenshot shows a web-based voter registration application. At the top, a message states: "The voter could not be verified through MVD data." Below this is a header with navigation buttons: "New", "Save", "Clear", "Search", and "Process Batch". The main form contains several sections:

- Personal Information:** Fields for Voter ID, State ID (011111111), SSN, Birth Date (01/01/1940), Age (75), Gender, Last Name (TEST), First Name (VOTER), MI, and Suffix.
- Residence:** Includes tabs for "Prev Registration", "Absentee" (which is highlighted), "Contacts", and "History". It features dropdowns for "Standard", "NCOA", "CASS", "Migration", "Comments", and "Election Worker". Fields include House #, Suffix, Pre Dir, Street Name, Type, Post Dir, Unit Type, City/St/Zip, and County (JEFFERSON).
- Mailing:** Fields for Country (UNITED STATES OF AMERICA), USA (checked), Address, and City/St/Zip.
- Registration:** Includes "Misc Info", "Custom", "Duplicate Req.", and "Undeliverable" tabs. Fields include Party (No Party), Last Verified Date (06/09/2015), Status (Late Registration - LR), Reason, Source of Registration (DMV - 01), Old Voter ID, County Reg Date (06/09/2015), Vote Eligible, Last Voted Date, and checkboxes for "No Signature", "Confidential", "US Citizen", and "MVD Verified".
- Voter Polling Locations:** Fields for Precinct, Split, and Polling Place, with a "View Image" button.
- Election:** A table with columns: Election, Late Reg Date, Date, and Polling Places.
- Districts:** A table with columns: District Type, Code, and Name.

\*On election day **New** late registrants get an absentee ballot like the method above. **Precinct to precinct** and **county to county** late registrants **must** be issued ballots in the provisional module.

# Voter Registration – Late Reg

Assume that your voter did not want to be on the absentee list\*. To continue to issue a ballot to this Late Registrant, click the **Add** button.

\*These instructions for issuing a ballot would change slightly if the voter asked to be on the absentee list.

The screenshot displays a web-based voter registration system interface. At the top, a message states "Voter record successfully retrieved." Below this, a form contains personal information for a voter with ID 450131639, born 01/01/1980, residing at 1131. The voter's name is listed as VOTER TEST. The interface includes several sections: "Residence" with a table for tracking dates, elections, and addresses; "Voter Polling Locations" showing precinct PREC.02 - PREC.02-75 and split 02.02; "Election" history; and "Districts" with a list of various district types and codes. At the bottom, a "Registration" section provides details on the voter's status (Late Registration - LR), last verified date (06/09/2015), and other verification checkboxes like "MVD Verified", "SSA Verified", and "US Citizen". An "Add" button is highlighted in the "Residence" section, indicating the next step in the process.

Dates/Elections	Absentee ...	Address

District Type	Code	Name
CONGRESSIONAL	CONG	CONGRESSIONAL
STATEWIDE	MT	Montana
PUBLIC SERVICE C...	PS 03	Public Service Commissioner, Distri
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
WARD	CC_2W	WARD #2W
JURY	WHT-MC	WHITEHALL MUNICIPAL COURT

Registration	Misc Info	Custom	Duplicate Req.	Undeliverable
Party	No Party	Last Verified Date	06/09/2015	
Status	Late Registration - LR	<input type="checkbox"/> MVD Verified		
Reason		<input checked="" type="checkbox"/> SSA Verified		
Source of Registration	DMV - 01	<input type="button" value="Verify"/>		
Old Voter ID		County Reg Date	06/09/2015	
Vote Eligible		Last Voted Date		
<input type="checkbox"/> No Signature	<input type="checkbox"/> Confidential	<input type="button" value="Reveal"/>	<input checked="" type="checkbox"/> US Citizen	
Comments				

# Voter Registration

The Absentee Detail screen will open. Since this voter did not ask to be on the absentee list, leave the Absentee Type as **Election Specific**.

Pull down the election in the **Elections** box. The Absentee Application Source and Issue method will usually always be **In-Person** for late registrants. Everything else can be left as is and you would click **Save and issue Ballot**.

**Voter Registration - Absentee Detail**

[Help](#)

**Absentee Type**      **Elections**  
Election Specific      [Dropdown]

**Absentee Application Source**      **Issue Method**      **Issue Details**  
In-Person      In-Person      [Dropdown]

**Date Requested**      **Political Party**  
09/16/2015      [Dropdown]

Use Address On File

20 N MAIN ST  
WHITEHALL, MT 59759

Print Application

**Absentee Address**

**Country**      UNITED STATES OF AMERICA       USA       EMAIL       FAX

**Address**      [Text Field]

**City/St/Zip**      [Dropdown]      [Dropdown]      [Text Field]

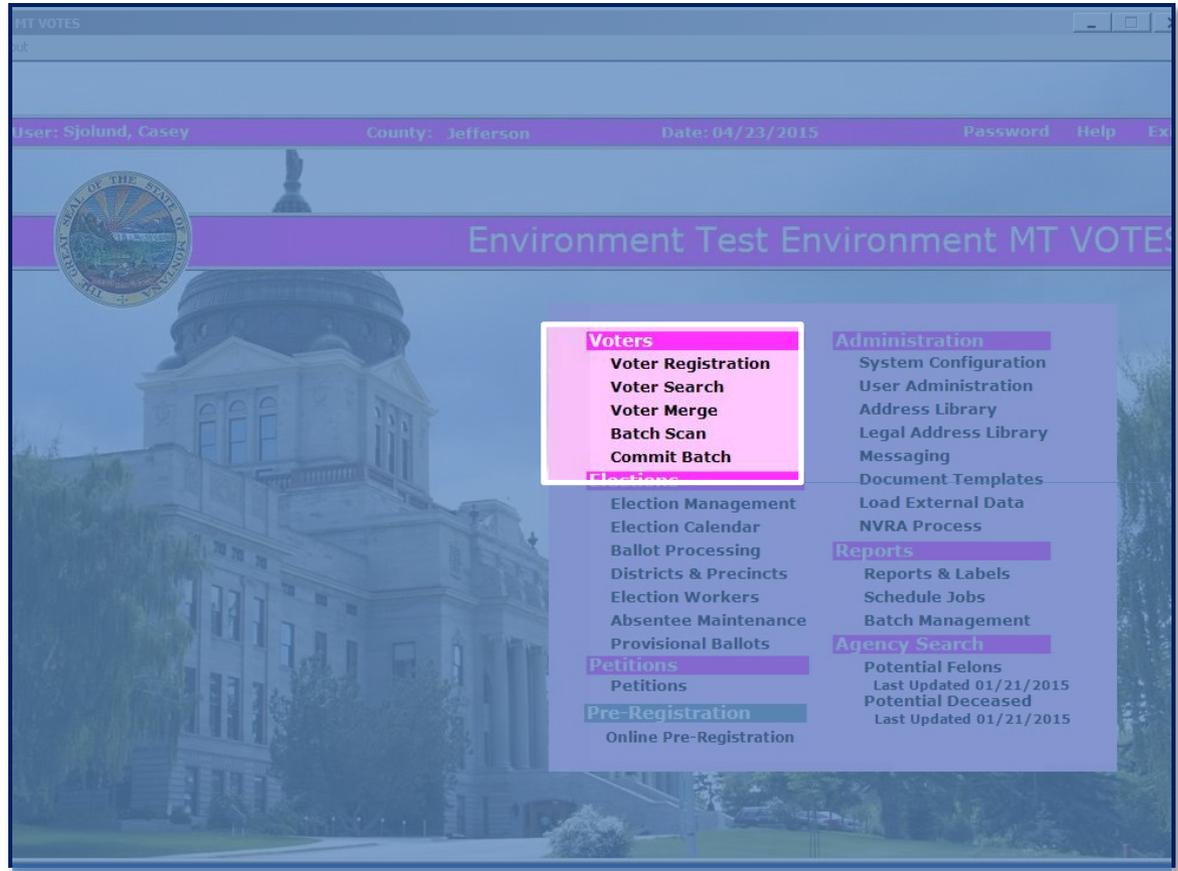
# VOTER REG – VOTER MERGE

- Merging a voter.

# Voter Registration

Occasionally you will come across what appears to be two or more separate voter records that are in fact the same individual.

When this situation comes up, you can use the Voter Merge module to remedy it.



# Voter Registration- Merge

To complete this portion of the training you will want to ensure you have a duplicate voter in your county. If you do not have one in the test environment, you can create one.

# Voter Registration

Start by checking the **Potential duplicates identified by the system.**

Make sure this radio button is selected, and click **Ok.**

The screenshot shows a web browser window titled "MT VOTES" with a purple header bar. The header contains the text "User: Sjolund, Casey", "County: Jefferson", "Date: 04/23/2015", "Password", "Help", and "Exit". A "Voter Merge" dialog box is open in the foreground, featuring a pink background and a title bar with a close button. The dialog box contains the following options:

- Potential duplicates identified by the system
- Query individual voters
- Saved query
- Unmerge voter
- Mergeable
- NonMergeable

At the bottom right of the dialog box are "OK" and "Cancel" buttons. The background of the browser window shows a blurred image of a building and the text "Online Pre-Registration" at the bottom.

# Voter Registration- Merge

If no voters are found on the Potential Duplicates Identified by the system, you can always use the radio button for Query Individual Voters.

# Voter Registration

The system will automatically bring up any matches that it has identified.

Uncheck the box under **Exclude** for both of these voters.

Next you have to identify which record you want to be the surviving record and then check the Survivor box next to that record.

The image shows two screenshots of a software window titled "Voter Merge Selection". The window contains a table with the following columns: Survivor, Exclude, ID, Mergeabl, Last Name, First Name, County, DOB, SSN, Effective Reg Date, and Original Re. In the first screenshot, the "Exclude" column has checked boxes for both records. In the second screenshot, the "Survivor" column has a checked box for the first record, and the "Exclude" column has unchecked boxes for both records. A blue arrow points from the "Add" button in the first screenshot to the "Add" button in the second screenshot.

Survivor	Exclude	ID	Mergeabl	Last Name	First Name	County	DOB	SSN	Effective Reg Date	Original Re
<input type="checkbox"/>	<input checked="" type="checkbox"/>	450131639	Yes	VOTER	TEST	Jefferson	01/01/19	1131	06/09/2015	06/09/2015
<input type="checkbox"/>	<input checked="" type="checkbox"/>	450131645	Yes	VOTER	TEST	Jefferson	01/01/19	1111	07/14/2015	07/14/2015

Survivor	Exclude	ID	Mergeabl	Last Name	First Name	County	DOB	SSN	Effective Reg Date	Original Re
<input checked="" type="checkbox"/>	<input type="checkbox"/>	450131639	Yes	VOTER	TEST	Jefferson	01/01/19	1131	06/09/2015	06/09/2015
<input type="checkbox"/>	<input type="checkbox"/>	450131645	Yes	VOTER	TEST	Jefferson	01/01/19	1111	07/14/2015	07/14/2015

# Voter Registration

Next, click on the **Compare** button. This screen will bring up information on both voters. The left side is the voter you marked as a survivor and the right as the potential duplicate. This screen is mainly used to verify the voters are the same.

Verify that the two voters are identical and ensure the correct voter is marked as a survivor and then click **Close**.

Survivor		Voter ID		450131639	
Name	VOTER, TEST				
Date of Birth	01/01/1980	SSN	1131		
Driver License					
Residential Address	20 N MAIN ST WHITEHALL, MT 59759				
Signature					

Potential Duplicate		Voter ID		450131645	
Name	VOTER, TEST				
Date of Birth	01/01/1990	SSN	1111		
Driver License					
Residential Address	20 WHITETAIL RD WHITEHALL, MT 59759				
Signature					

Registration	Mailing Address	Absentee Address	Misc Info	Moving History	Contacts	Alternate Names	
Party	No Party		Party	No Party			
Status	Active		Status	Active			
Reason			Reason				
Orig Reg Date	06/09/2015	Eff Reg Date	06/09/2015	Orig Reg Date	07/14/2015	Eff Reg Date	07/14/2015
Old Voter ID		Last Vote Date		Old Voter ID		Last Vote Date	
Confidential	None	Expiration		Confidential	None	Expiration	

Navigation: [Left Arrow] [Right Arrow] [Exclude] [Mark As Survivor] [Close]

# Voter Registration

To merge these voters, simply click the **Commit** button.

You will receive a pop up box notifying you know that information is different between the records. Take a look through the provided data and ensure it looks ok, if it does, click **Yes**.

Depending on how big the records are, the merge process can take time.

Once the merge is complete you will receive a confirmation message.

The screenshot displays the 'Voter Merge Selection' window with the following table:

Survivor	Exclude	ID	Mergeabl	Last Name	First Name	County	DOB	SSN	Effective Reg Date	Original Re
<input checked="" type="checkbox"/>	<input type="checkbox"/>	450131639	Yes	VOTER	TEST	Jefferson	01/01/19	1131	06/09/2015	06/09/2015
<input type="checkbox"/>	<input type="checkbox"/>	450131645	Yes	VOTER	TEST	Jefferson	01/01/19	1111	07/14/2015	07/14/2015

Below the table are buttons for 'Add', 'Compare', 'Commit', 'No Match', and 'Close'. A blue arrow points from the 'Commit' button to a 'Voter Merge' dialog box with the message: 'Merge was successful with resulting voter id:450131639' and an 'OK' button. Another blue arrow points from this dialog to a larger 'Voter Merge' dialog box with the following options:

- Potential duplicates identified by the system
- Query individual voters
- Saved query [dropdown menu]
- Unmerge voter [input field]
- Mergeable [input field]
- NonMergeable [input field]

Buttons for 'OK' and 'Cancel' are at the bottom right.

# Voter Registration- Merge

If the duplicate voter is located in a different county, the secondary county will need to mark the voter as mergeable (this can be accomplished in the Voter Merge module).

If you receive a merge request from a county, verify that the voter you mark as mergeable is the same as the voter they are trying to merge.

# VOTER REG – UNMERGE

- Unmerging a voter.

# Voter Registration

If a voter was wrongly merged, the system allows a user to Unmerge.

To Unmerge, simply pull up the Voter Merge menu, click the radio button next to Unmerge Voter and then type in the Voter ID and clicking OK.

This process takes time, sometimes longer than 15 minutes depending on how big the records are.

The screenshot shows the MT VOTES web application interface. At the top, the user is logged in as 'User: Sjolund, Casey' in 'County: Jefferson' on 'Date: 04/23/2015'. The page title is 'Environment Test Environment MT VOTES'. A 'Voter Merge' dialog box is open, titled 'Choose Voter merge option'. It contains the following options:

- Potential duplicates identified by the system
- Query individual voters
- Saved query
- Unmerge voter
- Mergeable
- NonMergeable

At the bottom of the dialog box are 'OK' and 'Cancel' buttons. The background of the application shows a logo for the 'GREAT SEAL OF THE STATE OF MONTANA' and a banner for 'Online Pre-Registration' with the text 'Last Updated 01/21/2015'.

# ELECTION MANAGEMENT

- Creating an Election
- Ballot Styles
- Printing Labels

# Election Management

Before you get started building an election, it is recommended that you create a folder on your desktop or on your local sharedrive named for this election.

## **Why do this?**

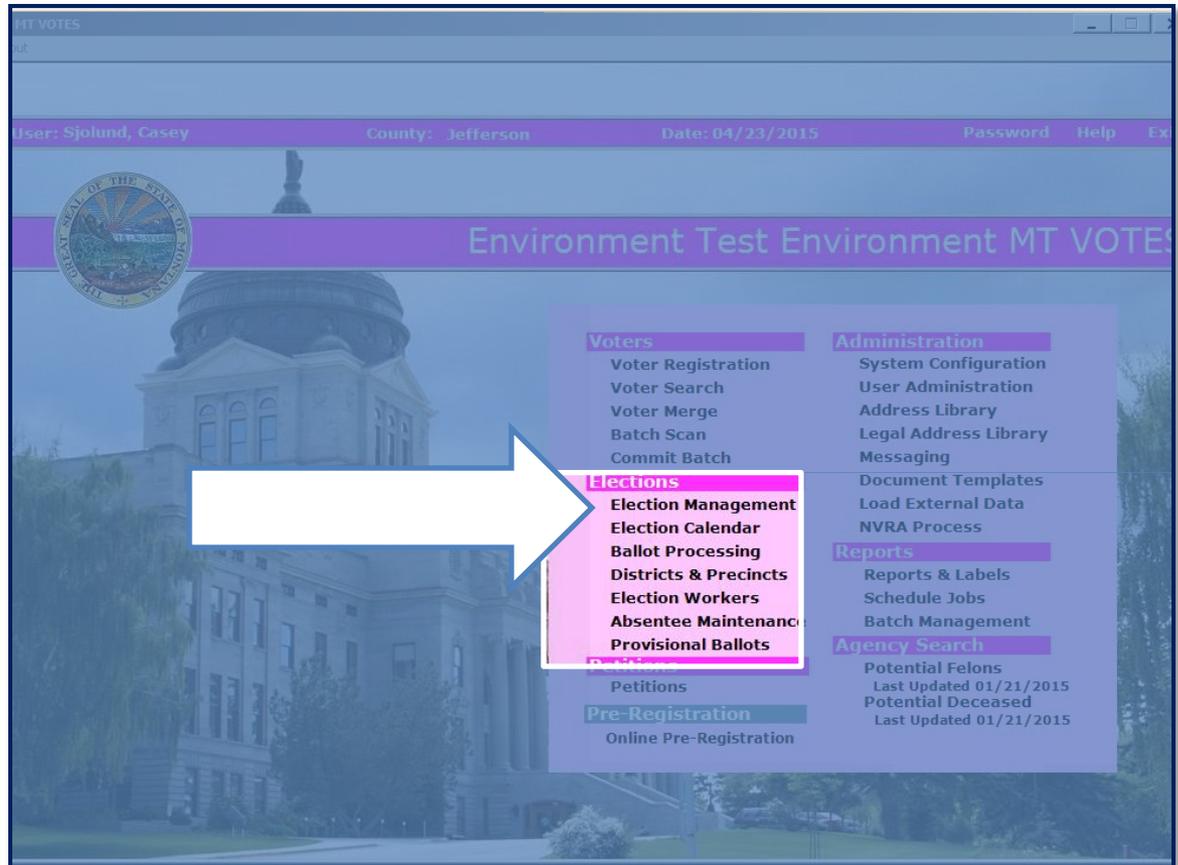
Simply put, MT Votes is a live database. Data that you see today, might be different tomorrow.

This folder will be used as a receptacle for reports/exports/labels/etc. Keeping a copy ensures that you have created a hardcopy of the snapshot you pulled out of the system.

It's wise to routinely save data that you pull out of MT Votes. You might never need it, but when you do need it, you'll be glad you have it.

# Election Management

To begin the process of creating an election, click on **Election Management**.



# Election Management

This screen will show you any Open elections you have. You can double click on an open election to open that election if you need to access it.

We will be starting a new election, so click the **New** button.

The screenshot shows the 'Election Management' application window. The title bar reads 'Election Management' and the current view is 'Election Alphabet Mapping'. The interface includes search filters for 'Election Date', 'Election Year', 'Description', and 'Election Type'. There are checkboxes for 'Show Closed' and 'Show Deleted/Cancelled', along with 'Search' and 'Clear' buttons. A table displays the following data:

Election Date	Election Type	Description
05/05/2015	School	Test Election #2
05/01/2015	Federal General	Test Election

At the bottom of the window, there are buttons for 'New', 'Details', 'Delete', 'Cancel', and 'Close'. The 'New' button is highlighted with a pink box.

# Election Management

The left hand side of the **Election Management** module indicates what step of the Election building process you are on.

When it first opens, it defaults to the **Election Details** screen.

The screenshot shows the 'Election Management' application window. The title bar includes 'Election Management' and standard window controls. Below the title bar is a menu bar with options: 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. In the top right corner, there are links for 'Voter Search' and 'Help'.

The main content area is divided into several sections:

- Left Sidebar:** A vertical list of blue links under the heading 'Election Details'. The links are: 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'.
- Main Form Area:** Contains various input fields and dropdown menus:
  - Election Date:** A text input field.
  - Description:** A large text input field.
  - Election Type:** A dropdown menu.
  - Election Method:** A dropdown menu with 'Poll' selected.
  - Poll Hours:** A sub-section with 'Open' (7:00 AM) and 'Close' (8:00 PM) time inputs.
  - Publication Dates:** A sub-section with 'Start' and 'End' date inputs.
  - Registration Dates:** 'Closing Date for Registration' and 'Official County Canvass Votes Date' input fields.
  - Late Registration:** 'Late Registration Voter Eligible Date (Sunday before the close of registration)' with a date input and a calendar icon.
- Districts Table:** A table with the following columns: 'District', 'Control County', '# Of Offices', and '# Of Issues'. The table is currently empty.
- Statistics:** A large empty rectangular area on the right side of the main form.

At the bottom of the window, there is a checkbox labeled 'Process completed' and a 'Save' button.



# Election Management

To comply with data standardization, the name of your election should follow this naming convention:

- County License # Type of Election Year of Election

Beaverhead for example would be:

- 18 Federal Primary Election 2016

# Election Management

## Include Certified Contests

This screen displays any shared races. Most commonly you will see Statewide or Legislative races. If any contest is in the 'Include Certified Contests' screen, it must be included or you won't be able to proceed.

Click **Select All**, check **Process Completed** and check **Save**.

The screenshot shows the 'Election Management' application window. The title bar reads 'Election Management' and the menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main content area is titled 'Election Date: Jun-07-2016', 'Election Type: Federal Primary', and 'Description: Test Fed. Primary'. On the left is a navigation menu with links: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The main area is divided into three sections: 'Shared Districts' (a table), 'Include Offices' (a list with checkboxes), and 'Include Issues' (a list). At the bottom, there is a 'Process Completed' checkbox, a 'Save' button, and a 'Select All' button.

District	Certifying Jurisdiction
SUPREME COURT JUS...	STATE OF MT
Montana	STATE OF MT
CONGRESSIONAL	STATE OF MT
House District 75	STATE OF MT
Public Service Commi...	STATE OF MT
House District 71	STATE OF MT
Senate District 38	STATE OF MT
Senate District 36	STATE OF MT

SUPREME COURT CHIEF JUSTICE  
 SUPREME COURT JUSTICE #3

Process Completed

Save Select All

# Election Management

## Pull Contests

This area will have any contests that MT Votes identifies as set for re-election based on your Election Details.

Select all the races you want to include in this election by using the checkboxes next to the District/Race name or by using the Select All box.

When ready, select **Process Completed** and then **Save**.

The screenshot shows the 'Election Management' software interface. The window title is 'Election Management' and the menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main header displays 'Election Date: Jun-07-2016', 'Election Type: Federal Primary', and 'Description: Test Fed. Primary'. On the left, a sidebar contains a list of links: 'Election Details', 'Include Certified Contests', 'Pull Contest', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The main content area is divided into three sections: 'Districts - Positions' with a tree view showing 'Jefferson' (with sub-items 'Clerk of the District Court' and 'County Commissioner District 1') and 'SOIL CONSERVATION DISTRICT #3' (with sub-item 'JEFFERSON VALLEY SOIL CONSERVATION DISTRICT'); 'Incumbent Candidates' with an empty table; and 'Summary' with a table with columns 'District', 'Position', and 'Candidates'. At the bottom, there is a 'Process Completed' checkbox and 'Select All' and 'Save' buttons. A 'Refresh Wizard Status' link is located in the bottom left corner.

# Election Management

Don't worry if you don't see your office or candidate on this screen. Data on this screen is being pulled from the position tabs in the Districts and Precincts Module. Most of the position information in the D&P module was entered when the system was new and some data is now out dated. If the office/candidate is not on this screen, you will have an opportunity to manually add it to the election through Issues & Offices menu option.

However, it is good data administration to update this information in the Districts and Precincts module as you come across it.

# Election Management

## Issues & Offices

This screen is where a user can manually add **Offices**, **Candidates**, and **Issues** that don't automatically get pulled in through the Pull Contests menu item.

The screenshot shows the 'Election Management' application window. The title bar includes 'Election Management' and standard window controls. Below the title bar is a navigation menu with items: Ballot Styles, Address Library, Pull Petitions, Polling Places, CASS, Districts Precincts, Reports. The main content area is divided into several sections:

- Header:** Election Date: Sep-15-2015, Election Type: Municipal Primary, Description: Test Election. Includes links for Voter Search and Help.
- Navigation Menu (Left):** Election Details, Include Certified Contests, Pull Contests, Issues & Offices, Publish Certified Contests, Ballot Styles, Ballot Review, Print Labels (with warning icon), Official Register (with warning icon), Election Expenses, Election Results, Process Official Register, Duplicate Ballot Report, Close Election (with warning icon), Exit, Refresh Wizard Status.
- Districts Table:**

Code - Name	Control Coun
22 - Jefferson	Jefferson
- Offices Table:**

Offices
County Treasurer

Buttons: New, Details, Delete
- Candidates Table:**

Name	Political Party	Status	Ballot Position	Pe
------	-----------------	--------	-----------------	----

Buttons: New, Details, Delete
- Issues Table:**

Caption	Issues #
---------	----------

Buttons: New, Details, Delete, Issue Sequences
- Footer:**  Process Completed

# Election Management

## Issues & Offices

If your office did not automatically pull in, you will have to add it manually.

Select the **New** button under Offices.

The screenshot shows the 'Election Management' application window. The title bar includes 'Election Management' and standard window controls. Below the title bar is a navigation menu with items like 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main content area is divided into several sections:

- Header:** Election Date: Sep-15-2015, Election Type: Municipal Primary, Description: Test Election. Includes links for 'Voter Search' and 'Help'.
- Left Sidebar:** A list of navigation links including 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. A 'Refresh Wizard Status' link is at the bottom.
- Districts Table:** A table with columns 'Code - Name' and 'Control County'. It contains one row: '22 - Jefferson' and 'Jefferson'.
- Offices Section:** A table with one row: 'County Treasurer'. Below the table are buttons for 'New', 'Details', and 'Delete'. A blue arrow points to the 'New' button.
- Candidates Table:** A table with columns 'Name', 'Political Party', 'Status', 'Ballot Position', and 'Pe'. It is currently empty.
- Issues Section:** A table with columns 'Caption' and 'Issues #'. It is currently empty.
- Bottom:** A 'Process Completed' checkbox and an 'Issue Sequences' button.

# Election Management

## Issues & Offices

This screen will be blank when it first opens. Click the District type and then the District to pull up all available positions.

Select the position you'd like to include in the election. Leave the Political Party blank and change the Vote For Number, if needed.

If you have more offices to add manually, click the Save & Add New, otherwise click **Save**.

The screenshot shows a software window titled "Election Offices" with a "Help" link in the top right corner. The window contains several input fields and a list of positions:

- District Type:** A dropdown menu with "COUNTYWIDE" selected.
- District:** A dropdown menu with "Lewis & Clark" selected.
- Position:** A list box containing the following text:  
COUNTY COMMISSIONER DISTRICT #1(PONICH-HUNTHAL  
COUNTY TREASURER/CLERK AND RECORDER(DE HART, PA  
COUNTY SHERIFF(DUTTON, LEO C / DUTTON, LEO C / DU  
COUNTY CORONER(NELSON, MICHAEL E / NELSON, MICH  
COUNTY ATTORNEY/PUBLIC ADMINISTRATOR(GALLAGHER  
COUNTY SUPERINTENDENT OF SCHOOLS(DAVIS, MARSHA  
JUSTICE OF THE PEACE(SWINGLEY, MIKE / OITZINGER, S  
COUNTY COMMISSIONER DISTRICT #2(BROWN, DEREK /  
CLERK OF THE DISTRICT COURT(SWEENEY, NANCY / SWI  
COUNTY COMMISSIONER DISTRICT #3(MURRAY, MICHAEL
- Political Party:** A dropdown menu that is currently blank.
- Vote For Number:** A text input field containing the number "1".
- Is Primary:** A checkbox that is currently unchecked.

At the bottom of the window, there are three buttons: "Save & Add New", "Save", and "Close".

# Election Management

## Issues & Offices

Once all offices are entered, you can start adding candidates. To do so, click the office you want to add the candidate to and click **New**.

The screenshot shows the 'Election Management' application window. The top navigation bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main header displays 'Election Date: Sep-15-2015', 'Election Type: Municipal Primary', and 'Description: Test Election'. A left sidebar contains a menu with options like 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The main content area is divided into three sections: 'Districts', 'Offices', and 'Candidates'. The 'Districts' table has columns for 'Code - Name' and 'Control Count', with one entry: '22 - Jefferson' and 'Jefferson'. The 'Offices' table has a column for 'Name' and one entry: 'County Treasurer'. Below the 'Offices' table are 'New', 'Details', and 'Delete' buttons. The 'Candidates' table has columns for 'Name', 'Political Party', 'Status', 'Ballot Position', and 'Pe'. Below it are 'New', 'Details', and 'Delete' buttons. The 'Issues' table has columns for 'Caption' and 'Issues #'. Below it are 'New', 'Details', 'Delete', and 'Issue Sequences' buttons. A 'Process Completed' checkbox is located at the bottom left of the main content area. A 'Refresh Wizard Status' link is at the bottom left of the sidebar. A 'Voter Search Help' link is at the top right of the main content area. Two blue arrows point to the 'New' buttons in the 'Offices' and 'Candidates' sections.

Code - Name	Control Count
22 - Jefferson	Jefferson

Name
County Treasurer

Name	Political Party	Status	Ballot Position	Pe
------	-----------------	--------	-----------------	----

Caption	Issues #
---------	----------

# Election Management

## New Candidate

Type the first and last name of the voter you'd like to add as a candidate and then **Link To Voter**. The voter's information should automatically fill. Select a **political party**, update any information that needs to be updated and ensure they meet any specified requirements.

Click **Save**.

Verify the **Ballot Name** field is exactly how the candidate wants the name to appear on the ballot. If it is, select **OK**.

The screenshot shows the 'Election Management' application window. The main form is titled 'New Candidate' and contains the following fields and sections:

- Election Information:** Election Date: Sep-15-2015, Election Type: Municipal Primary, Description: Test Election.
- Candidate Information:** District: 22 - Jefferson, Position: County Treasurer, Last Name: VOTER, First Name: TEST, Middle Name: (empty), Suffix: (empty), Ballot Name: TEST VOTER, Status: Certified, Incumbent: (unchecked), Political Party: No Party, Ballot Position: (empty).
- Address Section:** Includes a table for Address Type, Address, and Last Updated. The table has three rows: Mailing, Resident Address (20 WHITETAIL RD, WHITEHALL, MT 59759), and Work Address. The last updated date for the resident address is 09/17/2015.
- System Requirements:** Satisfying Eligibility Requirements (County residency: unchecked) and System Requirements (Lives within district: unchecked).
- Buttons:** Save & Add New, Save, Close, and a 'Validate Candidate' button.

The 'Ballot Name Review' dialog box contains the following text and buttons:

Check ballot name to verify the name is the same as what is requested on the ballot

OK Cancel



# Election Management

## Issues & Offices

The candidate is now entered and certified. Continue to enter candidates until you are done.

To add an Issue click the **New** button below the Issues box.

The screenshot shows the 'Election Management' application window. The title bar includes 'Election Management' and standard window controls. Below the title bar is a navigation menu with 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main content area is divided into several sections:

- Header:** Election Date: Sep-15-2015, Election Type: Municipal Primary, Description: Test Election. Includes links for 'Voter Search' and 'Help'.
- Left Sidebar:** A list of navigation links including 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. A 'Refresh Wizard Status' link is at the bottom.
- Districts Table:** A table with columns 'Code - Name' and 'Control County'. It contains one entry: '22 - Jefferson' under 'Code - Name' and 'Jefferson' under 'Control County'. A 'Process Completed' checkbox is at the bottom.
- Offices Table:** A table with one entry: 'County Treasurer'. Below it are 'New', 'Details', and 'Delete' buttons.
- Candidates Table:** A table with columns 'Name', 'Political Party', 'Status', 'Ballot Position', and 'Pe'. It contains one entry: 'VOTER, TEST' under 'Name', 'No Party' under 'Political Party', 'Certified' under 'Status', '1' under 'Ballot Position', and 'NC' under 'Pe'. Below it are 'New', 'Details', and 'Delete' buttons.
- Issues Table:** A table with columns 'Caption' and 'Issues #'. It is currently empty. Below it are 'New', 'Details', 'Delete', and 'Issue Sequences' buttons.

# Election Management

## Create an Issue

You need to provide an **Issue No.**, **District Type** and a **District**.

As we get closer to the election the SOS office will send out the field requirements for the Issues screen. For this test scenario you can fill out any fields you like.

Once done, click **Save**.

The screenshot displays the 'Election Management' application window. The title bar includes 'Election Management' and standard window controls. Below the title bar is a navigation menu with items: 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main content area is divided into a left sidebar and a main form area. The sidebar contains a list of links: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election' (with a warning icon), and 'Exit'. At the bottom of the sidebar is a 'Refresh Wizard Status' link. The main form area has a header with 'Election Date: Jan-15-2016', 'Election Type: Federal Primary', and 'Description: test primary'. Below this is a form for 'Issues No.' (25 - 01), 'District Type' (COUNTYWIDE), and 'District' (Lewis & Clark). The form is divided into two tabs: 'General' and 'Result Of/Impact'. The 'General' tab is active and contains fields for 'Caption', 'Question', and 'Summary', each with character and word counts. There are also checkboxes for '50% Eligibility Applies' and '60% Eligibility Applies'. At the bottom of the form is a 'Campaign Committee if any' field. The footer of the form contains three buttons: 'Save & Add New', 'Save', and 'Close'.

# Election Management

## Publish Certified Contests

This area is used if you have a shared contest, and where you would publish it for the other county to utilize.

This area is used but rarely, so go ahead and mark **process completed** and hit save.

The screenshot shows the 'Election Management' software interface. The title bar reads 'Election Management' and the menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main content area is titled 'Election Date: Jun-07-2016', 'Election Type: Federal Primary', and 'Description: Test Fed. Primary'. On the left, a sidebar contains a list of links: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election' (with a warning icon), and 'Exit'. The main area is divided into three sections: 'Shared Districts' (a large empty table), 'Certify Offices' (a table with 10 empty rows), and 'Certify Issues' (a table with 10 empty rows). At the bottom, there is a 'Process Completed' checkbox, a 'Refresh Wizard Status' link, and 'Save' and 'Select All' buttons.

# Election Management

The next section tackles **Ballot Styles**. Before we cover that part of Election Management, it is important that we understand what a ballot style is and how MT Votes treats them.

A Ballot Style is a set of candidates/races/issues that is unique to the jurisdiction represented on the ballot. Ballot styles for federal elections are broken down by Precinct. Precinct 1 is one ballot style, and Precinct 2 is a second, etc.

If you only had statewide, countywide or legislative races, you'd have one ballot style for each precinct. However, it's not always that cut and dried. For example, if during a Federal Election, Precinct 1 covers a portion of a city and a portion of the county and you had a citywide race/issue on the ballot. This precinct would have two ballot styles. One that would include the citywide contest, and one that would not include the citywide contest.

When you generate your ballot styles, MT Votes will automatically split this precinct into two styles and assign the voters to the correct split based on their residential address/precinct split information

# Election Management

## Ballot Styles

This menu item will allow you to generate ballot styles based on the data that you have added in previous menu item.

Click **Generate Styles**. Read the pop-ups and if it looks good, click **Yes**.

Federal Elections are always generated by Precinct. Other elections will allow you to choose whether you want to generate styles by precinct or district.

The screenshot shows the 'Election Management' application window. The title bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main window displays the following information:

- Election Date:** Jun-07-2016
- Election Type:** Federal Primary
- Description:** Test Fed. Primary

On the left is a navigation menu with the following items:

- Election Details
- Include Certified Contests
- Pull Contests
- Issues & Offices
- Publish Certified Contests
- Ballot Styles**
- Ballot Review
- Print Labels
- Official Register
- Election Expenses
- Election Results
- Process Official Register
- Duplicate Ballot Report
- Close Election
- Exit

The main area is titled 'Styles' and contains a 'Polling Places' dropdown menu and a table with the following columns: Style, Party, and Voters. The table is currently empty.

On the right, the 'Style Details' section includes input fields for Style, Color, and Party, a 'Shared Offices Only' checkbox, and a 'Save' button. Below this is a 'Contests' section with a 'Special Considerations' tab and a table with columns for District and Item. At the bottom right of this section is a 'Show Voter Count' button.

At the bottom of the window, there are checkboxes for 'Ballot Styles Renamed' and 'Process Completed', and buttons for 'Generate Styles', 'Resync Voter', 'View Absentees', and 'Pull Absentees'. A 'Refresh Wizard Status' link is located in the bottom left corner.

# Election Management

## Ballot Styles

Once the styles generate you will want to rename these styles to something that makes sense to you. The default system value is arbitrary.

Select a style in the Styles box and then change the name in the Style Details Style box and then click Save.

Please note, if you need more information to help decide what the style name should be, the precinct box (lower right) will tell you what precinct the style belongs to.

The screenshot shows the 'Election Management' software interface. At the top, a status bar reads 'Ballot Styles generated successfully. (Please 'Refresh Wizard Status'.)' with links for 'Voter Search' and 'Help'. The main window is titled 'Election Date: Jun-07-2016 Election Type: Federal Primary Description: Test Fed. Primary'. On the left is a navigation menu with options like 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The 'Ballot Styles' section is active, showing a table of styles with columns for Style, Party, and Voters. Below this is a 'Polling Places' dropdown menu. To the right is the 'Style Details' section with input fields for Style (set to '1'), Color, and Party, and a 'Shared Offices Only' checkbox. Below that is the 'Contests' section with a 'Special Considerations' tab and a list of contests including 'CONGRESSIONAL', 'House District 71', 'Jefferson', and 'Montana'. At the bottom right is the 'Precincts | Splits' section with a 'Show Voter Count' button and a table with columns for Precinct, Polling Place, and Total. The bottom of the window contains several buttons: 'Refresh Wizard Status', 'Ballot Styles Renamed', 'Process Completed', 'Generate Styles', 'Resync Voter', 'View Absentees', and 'Pull Absentees'.

Style	Party	Voters
1		1032
10		1249
11		723
2		527
3		1123
4		480
5		1016
6		559
7		1099
8		78
9		182

Precinct	Polling Place	Total
PREC.01 - PREC.01-71	COMMUNITY HALL - WH...	

# Election Management

Now that the **Styles** have been renamed you are ready to **Pull Absentees**.

The Pull Absentee box is currently grayed out. You must verify that you have renamed the Ballot Styles via the check box before this box will be selectable.

**Election Management**  
Ballot Styles | Address Library | Pull Petitions | Polling Places | CASS | Districts Precincts | Reports

**Ballot Style successfully saved.** [Voter Search](#) [Help](#)

**Election Date:** Jun-07-2016    **Election Type:** Federal Primary    **Description:** Test Fed. Primary

Election Details  
 Include Certified Contests  
 Pull Contests  
 Issues & Offices  
 Publish Certified Contests

**Ballot Styles**  
[Ballot Review](#)  
[Print Labels](#)  
[Official Register](#)  
[Election Expenses](#)  
[Election Results](#)  
[Process Official Register](#)  
[Duplicate Ballot Report](#)  
 Close Election  
[Exit](#)

[Refresh Wizard Status](#)

**Styles**  
Polling Places: [Dropdown]

Style	Party	Voters
PREC1		1032
PREC4		1249
PREC2		723
PREC2-NOSOIL		527
PREC9		1123
PREC6		480
PREC7		1016
PREC8		559
PREC10		1099
PREC3		78
PREC5		182

**Style Details**  
Style: PREC5  
Color: [Dropdown]  
Party: [Dropdown]  
 Shared Offices Only    **Save**

**Contests** | Special Considerations

District	Item
CONGRESSIONAL	UNITED STATES REPRESENTA.
House District 75	STATE REPRESENTATIVE DIST.
Jefferson	Clerk of the District Court
Jefferson	County Commissioner District
Montana	ATTORNEY GENERAL
Montana	GOVERNOR & LT. GOVERNOR
Montana	PRESIDENT
Montana	SECRETARY OF STATE
Montana	STATE AUDITOR

**Precincts** | Splits | **Show Voter Count**

Precinct	Polling Place	Total
PREC.05 - PREC.05-75	BASIN SCHOOL	

Ballot Styles Renamed  
 Process Completed

**Generate Styles**    **Resync Voter**    **View Absentees**    **Pull Absentees**

Please note: Pulling absentees is a big deal. When doing this in production for an actual election, ensure that you are ready to pull the absentees. Doing so, creates prepared ballots for these voters.

# Election Management

The **Pull Absentees** button will now be clickable.

Once you are ready to **Pull Absentees**, click the button.

A pop-up will appear, select No if you have renamed the styles.

**Election Management**  
Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

**Ballot Style successfully saved.** [Voter Search](#) [Help](#)

**Election Date:** Jun-07-2016 **Election Type:** Federal Primary **Description:** Test Fed. Primary

**Styles**  
Polling Places  
Style: [Dropdown]

Style	Party	Voters
PREC1		1032
PREC4		1249
PREC2		723
PREC2-NOSOIL		527
PREC9		1123
PREC6		480
PREC7		1016
PREC8		559
PREC10		1099
PREC3		78
PREC5		182

**Style Details**  
Style: PREC5  
Color: [Field]  
Party: [Field]  
 Shared Offices Only

**Contests** | Special Considerations

District	Item
CONGRESSIONAL	UNITED STATES REPRESENTA.
House District 75	STATE REPRESENTATIVE DIST.
Jefferson	Clerk of the District Court
Jefferson	County Commissioner District
Montana	ATTORNEY GENERAL
Montana	GOVERNOR & LT. GOVERNOR
Montana	PRESIDENT
Montana	SECRETARY OF STATE
Montana	STATE AUDITOR

**Precincts** | Splits |

Precinct	Polling Place	Total
PREC.05 - PREC.05-75	BASIN SCHOOL	

Ballot Styles Renamed  
 Process Completed

[Refresh Wizard Status](#)

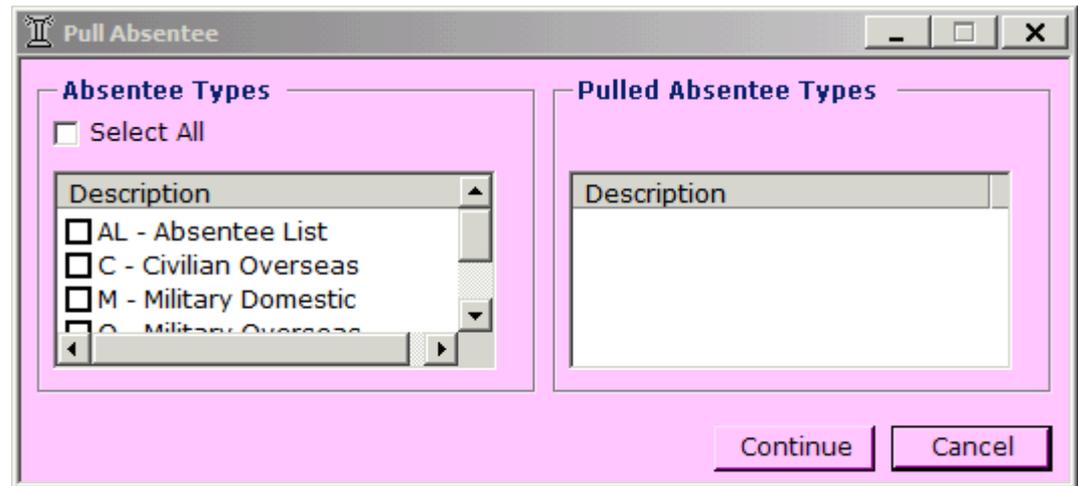
# Election Management

The next pop-up will ask you which **Absentee Type** you'd like to pull in.

Federal elections require that you send UOCAVA ballots out 45 days before the election. These Types will be the first you pull into Federal elections. Select the three UOCAVA type.

When ready, click **Continue**. Which will pull those absentee voters into this election.

Keep in mind that this is only pulling in the absentee types you selected. When you want to pull in your regular absentees, or your seasonal, you will have to come back to Election Management and pull those absentees into this election. It will not re-pull voters who have already been brought into the election.



# Election Management

As we all know, Election season is extremely busy, and anything you can do to help out your fellow Election Administrators is appreciated by all. One thing that you can do to help, is to not pull your absentees until you have to.

Pulling your absentee's too early causes registration headaches for other counties as they are no longer easily able to pull voters into their county.

# Election Management

## Ballot Review

This screen allows you to look at each style and see the contest(s)/issue(s)

It is good to go through each **Ballot Style** and verify that the correct races are showing up on each ballot. This data is provided to ES&S, eSERS and the EAS. It is paramount that this data is correct.

You can also Print this data for easier proofing, and/or save the file for your records.

Once you have verified the data, click **Process Completed**.

The screenshot displays the 'Election Management' software interface. The window title is 'Election Management' and the menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main content area shows the following details:

- Election Date:** Jun-07-2016
- Election Type:** Federal Primary
- Description:** Test Fed. Primary

On the left side, there is a navigation menu with the following items:

- Election Details
- Include Certified Contests
- Pull Contests
- Issues & Offices
- Publish Certified Contests
- [Ballot Styles](#)
- [Ballot Review](#)**
- [Print Labels](#)
- [Official Register](#)
- [Election Expenses](#)
- [Election Results](#)
- [Process Official Register](#)
- [Duplicate Ballot Report](#)
- Close Election
- [Exit](#)

The main area is titled 'Ballot Styles' and shows a dropdown menu set to 'All Styles'. Below this is a tree view titled 'Order Ballots' containing the following contests and candidates:

- LINDEEN, MONICA J
- STATE SUPERINTENDENT OF PUBLIC INSTRUCTION
  - JUNEAU, DENISE M
- Public Service Commissioner, District 3
  - PUBLIC SERVICE COMMISSIONER, DISTRICT 3
    - KOOPMAN, ROGER EDWARD
- SUPREME COURT JUSTICE
  - SUPREME COURT CHIEF JUSTICE
    - MCGRATH, MIKE
  - SUPREME COURT JUSTICE #3
    - COTTER, PATRICIA
- Senate District 36
  - STATE SENATOR DISTRICT 36
    - BARRETT, DEBBY
- Senate District 38
  - STATE SENATOR DISTRICT 38
    - KEANE, JAMES K
- House District 71
  - STATE REPRESENTATIVE DISTRICT 71
    - WAGNER, ROBERT J
- House District 75
  - STATE REPRESENTATIVE DISTRICT 75
    - MCCLAFFERTY, EDITH
- Jefferson
  - Clerk of the District Court
    - Marilyn A. Craft
  - County Commissioner District 1
    - SOIL CONSERVATION DISTRICT #3
      - JEFFERSON VALLEY SOIL CONSERVATION DISTRICT TRUSTEE
        - DAWSON, JOHN W
        - HEIDE, JOHN F

At the bottom of the window, there is a 'Process Completed' checkbox, a 'Ballot Style Printing' button, and 'Save' and 'Reset' buttons.



# Election Management

## Print Labels

**Batch #:** (This will autofill when you select **Print**)

**Description:** Describe your batch (ex, date/time/type/etc)

**Mailing Date:** Date they will be mailed

**Output Order:** How you would like them ordered

**Order by:** Ascending

**Output Type:** Print Now & Select an Absentee Label.

**Absentee Types:** Types you want to print.

Click **Search**. This should populate how many labels you are about to print.

The screenshot shows the 'Election Management' application window. At the top, there's a menu bar with options like 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. Below the menu bar, a status bar reads 'Invalid entry. Please review errors.' and there are links for 'Voter Search' and 'Help'.

The main form area is titled 'Election Date: Jun-07-2016', 'Election Type: Federal Primary', and 'Description: Test Fed. Primary'. It contains several sections:

- Batch #:** A text field containing '1'.
- Description:** A text field containing 'CivOS'.
- Mailing Date:** A text field containing '05/09/2016'.
- Selection Criteria:** A section with tabs for 'Languages', 'Special Assis Type', and 'Ballot Types'. Under 'Ballot Types', there's a sub-section for 'Absentee Types' with a list of checkboxes: 'Absentee List', 'Civilian Overseas' (selected), 'Election Specific', 'Military Domestic', 'Military Overseas', and 'Seasonal'. Below this list is an 'Include' dropdown menu and a 'Clear' button.
- Output Order:** A section with 'Field' and 'Order By' dropdowns. The 'Field' dropdown is set to 'BALLOT ID' and 'Order By' is set to 'ASC'. There are two more 'Field' dropdowns set to 'NONE'.
- Output Type:** A section with radio buttons for 'Print Now' (selected) and 'Print To File'. Below this is a 'Select Label' dropdown set to 'Absentee Labels' and a 'Number of Copies' spinner set to '1' with a 'Collate' checkbox checked.

At the bottom of the form, there are 'Search' and 'Clear All' buttons. A message below these buttons reads: '0 Voters meet the specified search criteria. Please select a label to print mailing labels for them.' At the very bottom right, there are 'Print' and 'Close' buttons.

The mailing date is very important to get correct, and must be set to the date that you will mail these ballots. If you enter this date incorrectly, the only way to change it is a manual process.

# Election Management

It is recommended that you whittle down the labels into smaller more manageable chunks rather than printing all your labels at once. You can use the Selection Criteria box to help limit the amount of labels you print.

**Election Management**  
Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

**Invalid entry. Please review errors.** [Voter Search](#) [Help](#)

**Election Date:** Jun-07-2016 **Election Type:** Federal Primary **Description:** Test Fed. Primary

**Batch #** 1 **Description** CivOS **Mailing Date** 05/09/2016

**Selection Criteria**

Language Special Assis Type Ballot Types  
Absentee Types Ballot Styles

- Absentee List
- Civilian Overseas
- Election Specific
- Military Domestic
- Military Overseas
- Seasonal

**Output Order**

Field	Order By
BALLOT ID	ASC
	NONE
	NONE

**Output Type**

Print Now  Print To File **!**

Select Label: Absentee Labels

Number of Copies: 1  Collate

Only Provisional

**0 Voters meet the specified search criteria. Please select a label to print mailing labels for them.**

[Refresh Wizard Status](#) [Print](#) [Close](#)

# Election Management

One best practice to get into after pulling an absentee type into an election, is to check to see if that type contains any provisionally registered individuals. You can do this by clicking the 'Only Provisional' check box and then clicking the search button. If it comes back with a number larger than zero, you will want to create a batch to handle these voters.

The screenshot shows the 'Election Management' application window. At the top, there is a navigation bar with links: Ballot Styles, Address Library, Pull Petitions, Polling Places, CASS, Districts Precincts, Reports. Below this is a status bar with the text 'Invalid entry. Please review errors.' and a 'Voter Search Help' link. The main area is divided into several sections:

- Election Information:** Election Date: Jun-07-2016, Election Type: Federal Primary, Description: Test Fed. Primary.
- Batch Information:** Batch # 1, Description CivOS, Mailing Date 05/09/2016.
- Selection Criteria:** A list of checkboxes for various absentee types: Absentee List, Civilian Overseas (highlighted), Election Specific, Military Domestic, Military Overseas, Seasonal. Below the list is an 'Include' dropdown menu and a 'Clear' button.
- Output Order:** A table with columns 'Field' and 'Order By'. The first row shows 'BALLOT ID' and 'ASC'. The second and third rows show empty fields and 'NONE'.
- Output Type:** Radio buttons for 'Print Now' (selected) and 'Print To File'. A 'Select Label' dropdown menu is set to 'Absentee Labels'. There is also a 'Number of Copies' field set to 1 and a 'Collate' checkbox.
- Search Results:** A 'Search' button, a 'Clear All' button, and a message: '0 Voters meet the specified search criteria. Please select a label to print mailing labels for them.'
- Navigation:** A 'Refresh Wizard Status' link at the bottom left, and 'Print' and 'Close' buttons at the bottom right.

Keep in mind that since we have only pulled in some absentees, this **Only Provisional** search is looking at that absentee type and no other.

# Election Management

The new requirement of EBR adds an additional search you should run before you print labels.

Before printing off a batch of labels, you should click on the Issue Method tab and select EBRS and or EMAIL and create a batch of labels for these voters. Otherwise you could mail them a ballot and have to reissue a second ballot when their EBR/Email ballot gets sent in.

The screenshot shows the 'Election Management' application window. The title bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main header displays 'Election Date: Jan-22-2016', 'Election Type: School', and 'Description: TEST SCHOOL VBM ELECTION'. A 'Voter Search Help' link is in the top right.

The interface is divided into several sections:

- Left Sidebar:** Contains 'Election Details' and a list of actions: 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', and 'Print Labels' (highlighted with a blue arrow). Below this are 'Process Official Report', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. A 'Refresh Wizard Status' link is at the bottom.
- Top Section:** Fields for 'Batch #', 'Description', and 'Mailing Date'.
- Selection Criteria:** A tabbed interface with 'Issue Method' selected. It lists various methods: 'In-Person', 'Mailing', 'Absentee Team', 'Designated Person', 'Fax', 'E-mail', 'EAS', and 'EBRS'. An 'Include' dropdown and a 'Clear' button are at the bottom. A checkbox for 'Only Provisional' is also present.
- Output Order:** Three rows of 'Field' and 'Order By' dropdown menus, all currently set to 'NONE'.
- Output Type:** Radio buttons for 'Print Now' and 'Print To File'. A 'Select Label' dropdown menu and a 'Number of Copies' spinner set to '1'. A checked 'Collate' checkbox.
- Bottom:** 'Search' and 'Clear All' buttons on the left, and 'Print' and 'Close' buttons on the right.

# Election Management

Once you have printed labels, it is too late to correct any mistakes that you may notice in the election.

**Be sure the election is 100% correct before printing the labels.**

# Election Management

## Print Labels

If you are sure everything is accurate, select the **Print Now** radio button and then click on the **Print** button.

Verify that the Mailing date is correct and click **Yes**.

**Election Management**  
Ballot Styles | Address Library | Pull Petitions | Polling Places | CASS | Districts Precincts | Reports

**Invalid entry. Please review errors.** [Voter Search](#) [Help](#)

**Election Date:** Jun-07-2016    **Election Type:** Federal Primary    **Description:** Test Fed. Primary

**Batch #** 1    **Description** CIVOS    **Mailing Date** 05/09/2016

**Selection Criteria**

Languages | Special Assis Type | Ballot Types

Absentee Types | Ballot Styles

- Absentee List
- Civilian Overseas
- Election Specific
- Military Domestic
- Military Overseas
- Seasonal

**Include** [v]    **Clear**

Only Provisional

**Output Order**

Field	Order By
BALLOT ID	ASC
	NONE
	NONE

**Output Type**

Print Now     Print To File    ⓘ

Select Label: Absentee Labels

Number of Copies: 1     Collate

**Search**    **Clear All**    0 Voters meet the specified search criteria. Please select a label to print mailing labels for them.

**Print**    **Close**

[Refresh Wizard Status](#)

Once printed. Labels can not be reorganized. A best practice is to print labels in small manageable chunks (AKA, ballot style, precincts Absentee type, or a combination.).



# Election Management

## Print Labels

Once you print the labels, you will be returned to the main **Print Labels** screen.

You can see the batch of labels that you just created and printed. If you need to reprint the labels you can select the batch and click **Label Reprinting**.

The screenshot shows the 'Election Management' application window. At the top, a green status bar reads 'Labels are printed successfully. (Please 'Refresh Wizard Status'.)' with links for 'Voter Search' and 'Help'. Below this, a header bar displays 'Election Date: Jun-07-2016', 'Election Type: Federal Primary', and 'Description: Test Fed. Primary'. A left-hand navigation menu includes options like 'Election Details', 'Print Labels', and 'Close Election'. The main content area, titled 'Mailing Ballot Batches', shows '0 Supplemental label(s) waiting to be printed.' and '0 Main label(s) waiting to be printed.' Below this is a table with one row of data:

Batch Date	Batch #	Batch Description
04/28/2015	1	CivOS

At the bottom of the window, there is a 'Process Completed' checkbox and three buttons: 'Label Printing', 'Label Reprinting', and 'Extract Label Information'. A 'Refresh Wizard Status' link is also present in the bottom left corner.

# Election Management

## Extract Label Information

If you have a vendor print labels for you, they will want this extract file. Also, as mentioned earlier, it is good to save this file so you have a snapshot of exactly what you created.

Select **Extract Label Information**, navigate to the folder on your desktop and save the file.

The screenshot shows the 'Election Management' application window. The title bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main content area is titled 'Election Date: Sep-17-2015', 'Election Type: Municipal Primary', and 'Description: SOS Test'. A left-hand navigation menu lists various options, with 'Print Labels' selected and marked with a green checkmark. The main panel displays 'Mailing Ballot Batches' with a status of '0 Supplemental label(s) waiting to be printed.' and '0 Main label(s) waiting to be printed.' Below this is a table with columns for 'Batch Date', 'Batch #', and 'Batch Description'. The table contains two rows: one for '07/14/2015' with 'Batch #' 2 and 'Batch Description' 'batch1', and another for '06/23/2015' with 'Batch #' 1 and 'Batch Description' 'civos'. At the bottom of the window, there are three buttons: 'Label Printing', 'Label Reprinting', and 'Extract Label Information'. The 'Process Completed' checkbox is checked.

Batch Date	Batch #	Batch Description
07/14/2015	2	batch1
06/23/2015	1	civos

# BALLOT PROCESSING

---

- Module Usage
- Voter Record

# Election Management

To complete this portion of the training I will need the labels that I created earlier.

Before we begin processing we need to create some real world test cases for these ballots. On my sheet I'll do the following:

- Write '**Void, County Requested**', on one label.
- Write '**Rejected- No signature**' on one label.
- Write '**Rejected- Late for election**' on one label.
- Write '**Accepted**' on the rest.



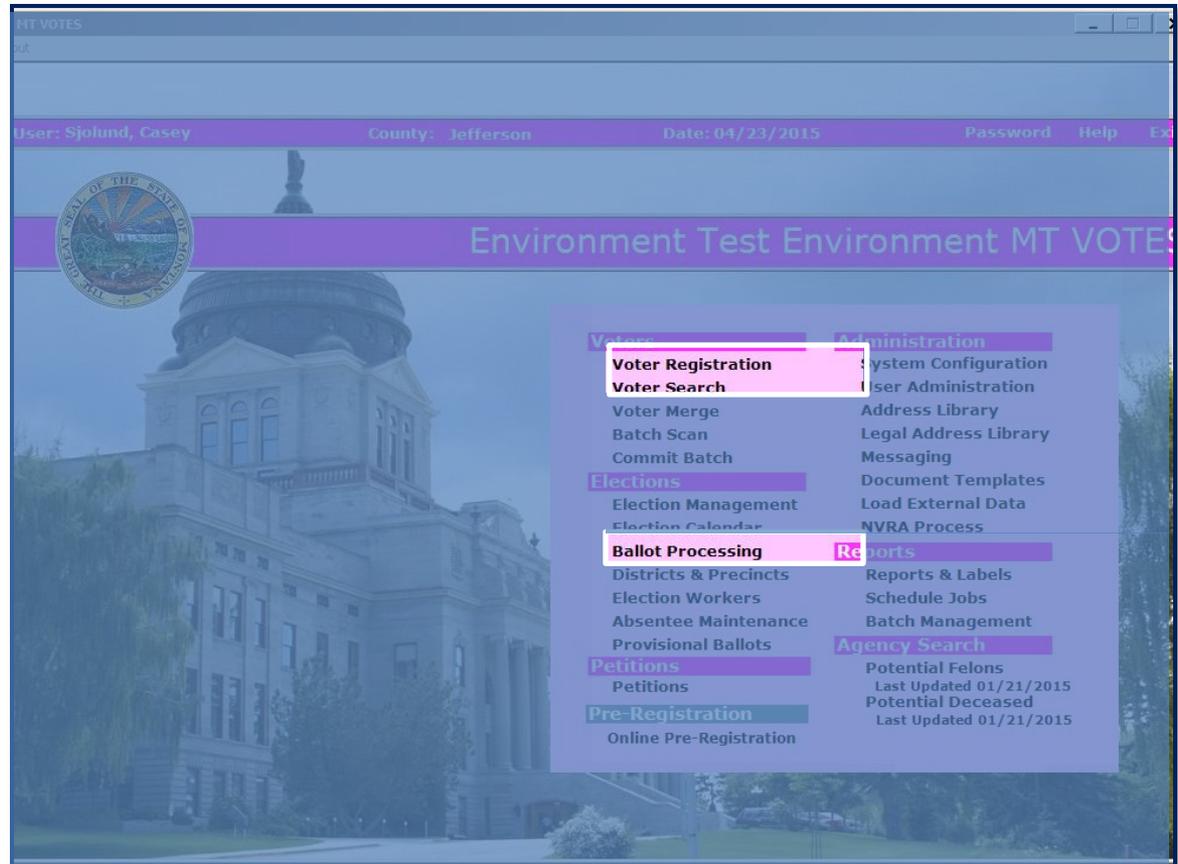
# Ballot Processing

In MT Votes, there are two ways to process ballots. The first is through the Voter Search and the other way is through Ballot Processing.

Voter Search is the best way to process a small amount of ballots and to Void/reissue ballots.

Ballot Processing is useful when you need to process large amounts of ballots quickly and for Tracking Undeliverable ballots.

The first thing we will do is void the ballot that I have flagged for a 'void-county requested', so I will go into **Voter Search** or Voter Registration if you know the Voter ID.



# Ballot Processing – Voter Record

Enter the **Last Name** and **First Name** into the appropriate fields and then hit **Search**.

Double click on the correct voter.

The screenshot shows the 'Voter Search' application window. At the top, it displays 'Query executed successfully. Showing total 2 of 2 records.' Below this is a search form with several sections:

- Select Saved/Published Search:** A dropdown menu and a 'Run Search' button.
- Search Options:** Checkboxes for 'Include Alternate Name', 'Show Confidential', 'Soundex', and 'Voters without Signatures'.
- Age:** Fields for 'Birth Date From', 'To', 'Age From (years)', 'To', 'Birth Month', and 'Day'.
- Scope:** Radio buttons for 'State' and 'County', a dropdown for 'Jefferson', and a 'Show Signatures' checkbox.
- Buttons:** 'Search', 'Voter Count', and 'Clear'.

Below the search form is a table with the following data:

ID	Last Name	First Name	Middle Name	Name Suffix	Status	De
450125928	VOTER	TEST			Active	01
450125930	VOTER	TEST			Active	01

At the bottom of the window are buttons for 'View Summary', 'Full Image', 'Select', and 'Close'.

# Ballot Processing – Voter Record

Once in the voters record, go to **Elections > Receive a Ballot.**

The screenshot displays a voter registration application window titled "Voter Registration". The interface includes a menu bar with options like "Voter", "Print", "Elections", "Petitions", "Imaging", and "Address". A dropdown menu is open under "Elections", showing options: "Voting History", "Active Ballots", "Temporary Parties", "Provisional Ballot", "Issue Ballot", "Receive Ballot F12", "View Worker Info", and "Search By Ballot ID". The "Receive Ballot F12" option is highlighted.

The main form area contains fields for "Voter ID" (45012592), "Birth Date" (01/01/1970), "Age" (45), "Gender" (VOTER), "Last Name" (VOTER), "First Name" (TEST), "MI", and "Suffix". There are also fields for "Residence", "House #", "Post Dir", "City/St/Zip" (CLANCY, MT, 59634), "County" (JEFFERSON), "Precinct" (REC.07-75), "Split" (01.07), "Mailing" (UNITED STATES OF AMERICA, USA), and "Address".

The "Active/Sent" section includes "Registration" (No Party), "Status" (Active - A), "Reason of Registration" (DMV - 01), "Source of Registration" (Verify), "Old Voter ID", "County Reg Date" (03/23/2015), "Vote Eligible" (03/23/2015), "Last Voted Date", and checkboxes for "No Signature", "Confidential", "Reveal", and "US Citizen".

On the right side, there are sections for "Voter Polling Locations" (Precinct: PREC.07 - PREC.07-75, Split: 01.07, Polling Place: CLANCY MUSEUM) and "Election" (Test Election, Test Election #2, Test Fed. Primary). Below that is a "Districts" table:

District Type	Code	Name
CONGRESSIONAL	CONG	CONGRESSIONAL
STATEWIDE	MT	Montana
PUBLIC SERVICE C...	PS 03	Public Service Commissioner, Distri
SUPREME COURT J...	SCJ	SUPREME COURT JUSTICE
JUDICIAL	JD 05	Judicial District 5
SENATE DISTRICT	SD 38	Senate District 38
HOUSE DISTRICT	HD 075	House District 75
COUNTYWIDE	22	Jefferson
LIBRARY	02	NORTH JEFFERSON COUNTY LIBRAR
FIRE	FR_01	CLANCY FIRE SERVICE AREA #01

# Ballot Processing – Voter Record

Key in the ballot ID# that is on the label into the **ID** field and click the **Process** button.

We will assume that this voter moved to a different county and the county requested us to void the ballot so they can pull the individual into their election.

The **Ballot Source** should be set to how we received the ballot, however in this example the ballot may not have been received. Set the source to **Absentee Team**, and **Status** to **Void**. In the comments field you may will want to indicate why you are voiding this ballot.

Select **Save**.

Individual Ballot Processing

[Voter Search](#) [Help](#)

**Ballot Details**

ID: 453327897

Ballot Source: Absentee Team

Election: 07-JUN-16 Test Fed. Primary

Voter Name: TEST, VOTER

Address: 1 N MAIN  
JEFFERSON CITY, MT 59638

Status: Void

Received Date: 04/29/2015

Comments:

**Ballot Sent** | Exceptions

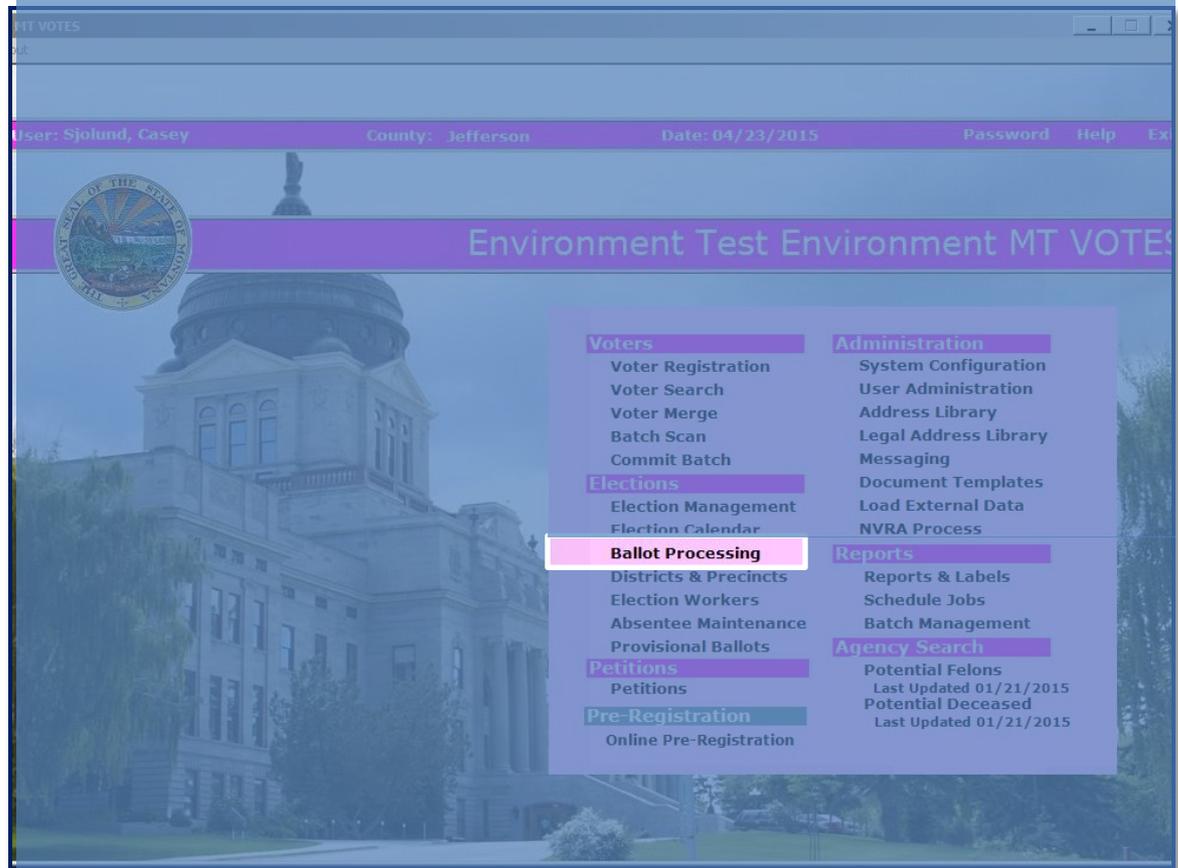
Seq. Sent	Barcode	Voter Name	Source	Date Sent	Date Received	Ballot style	Ballot Type
1	453327...	TEST, VOTER		05/09/20...		PREC6	Original

# Ballot Processing – Voter Record

You can also, **accept & reject** ballots from this screen.

# Ballot Processing – Module

Back at the MT Votes main screen, we will process the rest of the ballots through the **Ballot Processing** module.







# Ballot Processing – Module

Enter the Ballot ID number and click Add.

If your ballot labels are printed with the Ballot ID barcode and you have a hand scanner, you can scan the undeliverables into this module for faster processing.

If you do not use barcodes, you can enter the voter's name into the search field in the format "last name, first name" to add them.

When you are done adding to your batch, click Close.

**Undeliverable Ballots**

**Ballot has been received.** [Help](#)

**Batch**

Election: 01/22/2016 TEST SCHOOL VBM ELECTION    Batch Description:

Batch Date: 01/22/2016    Received Date: 01/22/2016    Identifier:

**Ballot Label**    **Ballot Search**

ID:      Name:

Street:     City:    

**Voter Details**

Name on Ballot: TIMBERLAKE, JUSTIN R    Name in Record: TIMBERLAKE, JUSTIN R

Status: Active    Status: Active

Ballot Residential Address: 22 S HOBACK ST  
HELENA, MT 59601    Current Residential Address: 413 8TH AVE  
HELENA, MT 59601

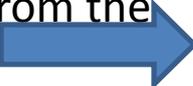
Ballot Mail Address: 22 S HOBACK ST  
HELENA, MT 59601    Address Type: Mailing    Current Mail Address:

Review Registration



# Ballot Processing – Module

The voter's record now shows that the ballot is undeliverable.

You can **remove the undeliverable status** by going back to ballot processing and deleting the person from the undeliverable batch. 

If the voter sends a new address for their ballot, you can **resend the ballot through the issue ballots screen.**

Voter record successfully retrieved. [Help](#)

New Save Clear Search Process Batch

Voter ID	State ID	SSN	Birth Date	Age	Gender	Last Name	First Name	MI	Suffix
450146854		1234	01/31/1981	34		TIMBERLAKE	JUSTIN	R	

**Residence** | Absentee | Contacts | History | Voting History

Standard  NCOA  CASS  Migration Comments  Election Worker  Clear

House #	Suffix	Pre Dir	Street Name	Type
413			8TH	AVE

Post Dir  Unit Type

City/St/Zip HELENA MT 59601

County LEWIS & CLARK Precinct PCT 17 Split P17.1

**Mailing**

Country UNITED STATES OF AMERICA  USA Clear

Address

City/St/Zip

**Active/Undeliverable**

**Registration** | Misc Info | Custom | Duplicate Reg. | Undeliverable

Party No Party Last Verified Date 01/22/2016

Status Active - A  MVD Verified

Reason   SSA Verified

Source of Registration In person - 06 Verify

Old Voter ID  County Reg Date 01/22/2016

Vote Eligible 01/03/2016 Last Voted Date

No Signature  Confidential Reveal  US Citizen

**Voter Polling Locations**

Precinct P17 - PCT 17

Split P17.1

Polling Place CIVIC CENTER BALLROOM

**Election**

Election	Late Reg Date	Date	Polling Places
TEST SCHOOL VBM E...	01/03/2016	01/22/2016	CIVIC CENTER BALLRO...
TEST PRIMARY POLL ...	01/18/2016	01/29/2016	CIVIC CENTER BALLRO...
Fed Prim Test - Poll LC	05/22/2016	06/07/2016	CIVIC CENTER BALLRO...

**Districts**

District Type	Code	Name
CONGRESSIONAL	CONG	CONGRESSIONAL
STATEWIDE	MT	Montana
PUBLIC SERVICE C...	PS 05	Public Service Commissioner, Distri
SUPREME COURT J...	SCJ	SUPREME COURT JUSTICE
JUDICIAL	JD 01	Judicial District 1
SENATE DISTRICT	SD 41	Senate District 41
HOUSE DISTRICT	HD 082	House District 82
COUNTYWIDE	25	Lewis & Clark
SCHOOL DISTRICT	01 EL	SCHOOL DISTRICT 1 ELEMENTARY
COMMUNITY COUN...	NCD2	Neighborhood Council District #2

# Ballot Processing – Module

You can print labels for your undeliverable voters with the **BP-035** report. This helps with mailing your undeliverable address confirmation notices.

The report will provide labels for the Avery 5160 template.

You can also extract the contact information for your undeliverable voters with the **EX-BP2** export.

The screenshot shows the 'Reports' application window. On the left is a navigation menu with links: Voter Registration, Election Management, Districts & Precincts, Petitions, Election Workers, Address Library, Labels, **Ballot Processing**, Master Lookups, and Close. The main area contains several filter sections: County (Lewis & Clark), Election (TEST SCHOOL VBM ELECTION - 01/22/2016), Districts (checkboxes for various districts), Batch Number (8), Precincts (checkboxes for PCT 01-P04), Voter Selection Range (From/To fields), Ballot Source (checkboxes for Absentee Team, Designated Person, E-mail), Ballot Style (checkboxes for PCT 01-03), and Party (checkboxes for Democrat, Republican, Nonpartisan, No Party). Below these is a 'Select Report' table:

Code	Name	Sort Order
BP-031	Batch Exception List Report	Last Name
BP-034	Ballot Stage/Status in Date Range	ZIP
<b>BP-035</b>	<b>Undeliverable Ballot Labels</b>	
BP-036	Ballots Preventing Election Certification	
BP-037	Seasonal Absentee Report	
BP-038	Ballot Status Change	
EX-BP1	Voter Master Listing by Election	
EX-BP2	Undeliverable Ballot Labels Export	

At the bottom, there are fields for Folder, Browse, Export, Cancel, and Run Report.









# Ballot Processing – Module

When you verify the ballots in the batch, you are checking to ensure that the signature matches as well as the voter information.

The default value is accepted. If you want to Accept this ballot, you can click the **Next** button to go to the next ballot in the batch, or you can **Close** to be returned back to the **Receive Ballots Batch** screen.

**Batch**

Election: 06/07/2016 Test Fed. Primary      Batch Description:

Batch Date: 05/05/2015      Received Date: 05/05/2015      Identifier:

**Ballot Label**

ID:

Source: Mail

**Ballot Search in Workspace**

Name:

Street:       City:

**Batch Navigation**

Name:        Record No:

      Only with Exceptions

     Item: 1 Of 1

**Ballot Details**

Ballot Received Date: 05/05/2015

voter name:

Address: 50123 FLORENCE, ITALY .  
ITALY

Ballot Status: Accepted

Comments:

Review Registration

Attestation on File:

**Exceptions** | **Ballots Sent**

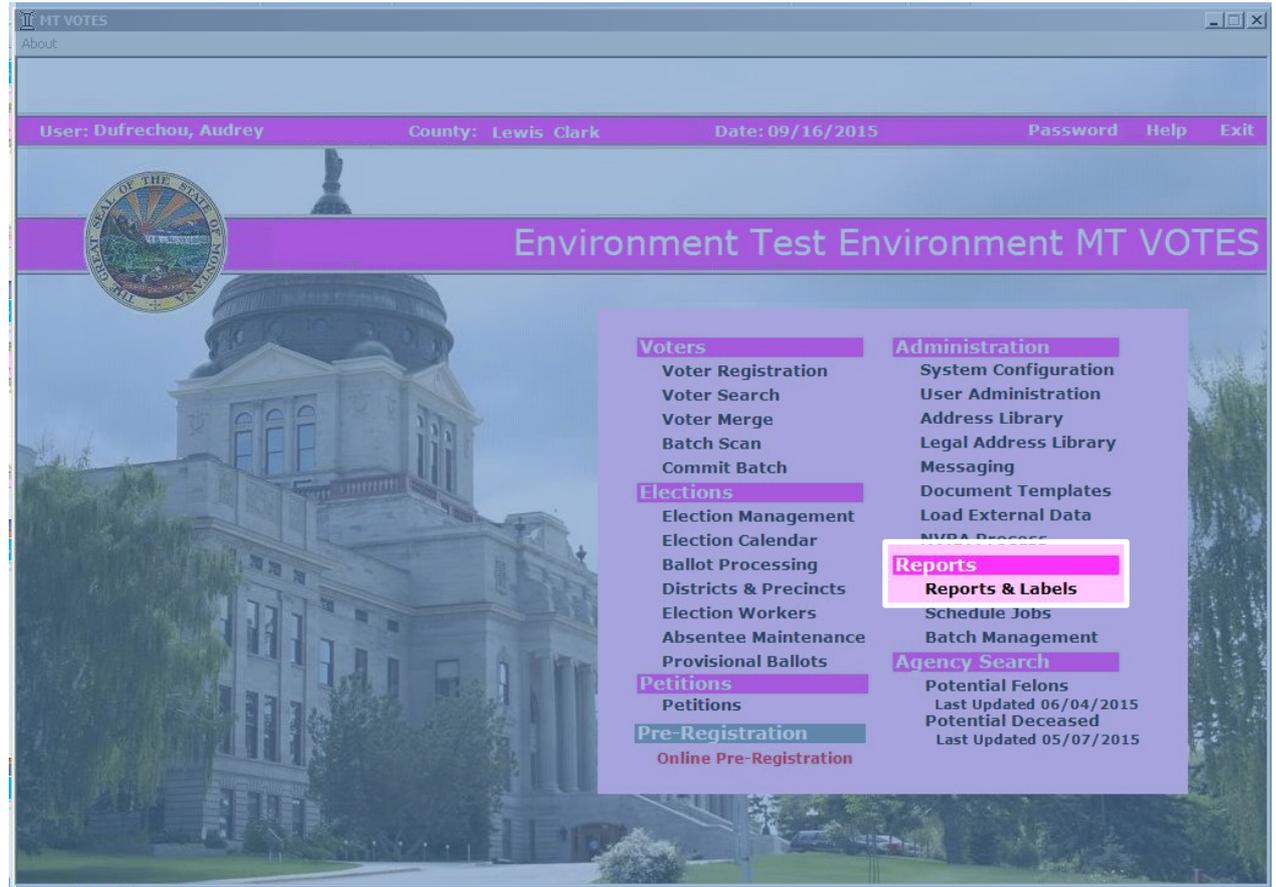
Sent Seq.	Barcode	VoterName	Source	Date Sent	Date Received	Ballot Style	Ballot Type
1			F Mail	05/05/2015	05/05/2015	PREC10	Original





# Ballot Processing

After you have scanned in and verified your batch, you can use the BP-34 report to reconcile your ballots.



# Ballot Processing

You will notice that there are many ways to run the BP-34 report.

Depending on how your office reconciles ballots, you can find the best way to run BP-34 reports.

The screenshot shows the 'Reports' application window with the following sections:

- Navigation Links:** Voter Registration, Election Management, Districts & Precincts, Petitions, Election Workers, Address Library, Labels, **Ballot Processing**, Master Lookups, Close.
- County:** Lewis & Clark
- Election:** 05 Municipal General and County Special Election - 11/03/2015
- Districts:**  All (Deleted districts will be included on report). List includes: AUGUSTA COUNTY WATER/SEWER DIS - W/S, AUGUSTA FIRE SERVICE AREA - 01, AUGUSTA VOL FIRE DISTRICT - 02, BAXENDALE VOL FIRE DISTRICT - 03, BIRDSEYE VOL FIRE DISTRICT - 04, CANYON CREEK VOL FIRE DISTRICT - 05, CITY OF EAST HELENA - 04.
- Batch Number:**  All
- Precincts:**  All (Deleted precincts will be included on report). List includes: PCT 01 - P01, PCT 02 - P02, PCT 03 - P03.
- Processed Date and Time:**  Processed Date and Time (Not valid for processed ballots before 07/15/2012). Fields for From and To with HH:MM:SS and AM/PM.
- Received Range:**  Received Range. Fields for From and To.
- Ballot Stage:**  All,  Prepared,  Sent (not returned),  Received/Processed,  Undeliverable.
- Ballot Style:**  All Ballot Styles,  01,  02,  03.
- Ballot Status:**  All,  Accepted,  Rejected,  Void.
- Select Report:** Table with columns Code, Name, and Sort Order.

Code	Name	Sort Order
BP-026	Ballot Statistics for Return by Date and Source	PRECINCT
BP-028	Ballot Proofing - By Precinct, Splits And Styles	BALLOT-STYLE
BP-031	Batch Exception List Report	BALLOT-SEQUE...
BP-034	Ballot Stage/Status in Date Range	LAST-NAME
BP-035	Undeliverable Ballot Labels	FIRST-NAME
BP-036	Ballots Preventing Election Certification	MIDDLE-NAME
BP-037	Seasonal Absentee Report	BALLOT STAGE
BP-038	Ballot Status Change	BALLOT STATUS
CV-001	Voter Master Listing by Election	
- Folder:** [Text Field] [Browse] [Export] [Cancel] [Run Report]

# PROVISIONAL BALLOTS

- Late Registration
- Provisional Ballot Module
- Provisional Ballot Reports
- Resolving Provisional Ballots

# Provisional Ballot Module

In order to ensure a voter can not vote two ballots in an election, the Provisional ballot module was created. Provisional ballots can be issued at the polls and at the election office. They are almost exclusively issued on Election Day. Most, but not all, ballots issued on Election Day will be issued out of the provisional ballot module.

If the voter is a late registrant on election day, and they are not a new voter, they must be issued a provisional ballot.

Please note, provisionally registered voters are not the same as voters who receive a provisional ballot.

# Provisional Ballot Module

I'll quickly walk you through an Election Day Transfer Late Registrant. These types of voters must be issued a Provisional ballot.

# Provisional Ballot Module

After entering registration information, you will need to go to the provisional ballot module. You can access it from the Main Menu or from the voter record through the Elections menu option.

The screenshot displays the 'Voter Registration' application window. The 'Voter rec' menu is open, and 'Provisional Ballot' is selected. The main form contains the following information:

- Process Batch** (highlighted)
- Birth Date:** 01/22/1980, **Age:** 35, **Gender:** [Dropdown]
- Last Name:** SJOLUND, **First Name:** CASEY, **MI:** L, **Suffix:** [Dropdown]
- Residence:** Standard, **House #:** 1326, **City/St/Zip:** HELENA, MT, 59601, **County:** LEWIS & CLARK, **Precinct:** PCT 06, **Split:** P06.4
- Mailing:** Country: UNITED STATES OF AMERICA,  USA
- Registration:** Party: No Party, Last Verified Date: 10/02/2008, Status: Late Registration - LR,  MVD Verified, Reason: [Dropdown], Source of Registration: Mail - 07, Verify button, Old Voter ID: [Field], County Reg Date: 04/17/2012, Vote Eligible: 10/02/2008, Last Voted Date: 06/18/2015,  No Signature,  Confidential, ,  US Citizen
- Voter Polling Locations:** Precinct: P06 - PCT 06, Split: P06.4, Polling Place: EXHIBIT BLDG-ENTRY HALL-FAIRGROUNDS
- Election Table:**

Election	Late Reg Date	Date	Polling Places
Test VBM School Elec...	11/15/2015	12/15/2015	EXHIBIT BLDG-ENTRY HALL
Test Federal Primary...	12/20/2015	01/19/2016	EXHIBIT BLDG-ENTRY HALL
- Districts Table:**

District Type	Code	Name
CONGRESSIONAL	CONG	CONGRESSIONAL
STATEWIDE	MT	Montana
PUBLIC SERVICE C...	PS 05	Public Service Commissioner, Distri
SUPREME COURT J...	SCJ	SUPREME COURT JUSTICE
JUDICIAL	JD 01	Judicial District 1
SENATE DISTRICT	SD 40	Senate District 40
HOUSE DISTRICT	HD 079	House District 79
COUNTYWIDE	25	Lewis & Clark
SCHOOL DISTRICT	01 EL	SCHOOL DISTRICT 1 ELEMENTARY
CITYWIDE	01	CITY OF HELENA
COMMUNITY COUN...	CCM4	Neighborhood Council District #4
- Registration Misc Info:**  No Signature,  Confidential, ,  US Citizen
- Comments:** [Text area]
- Disclaimer:** Under penalty of perjury that the information on this application is true, the... I am not serving a felony conviction in a penal institution nor have I... Even false information on this application, I may be subject to a fine or impr...
- Signature:** [Handwritten signature]
- by use only:** [Text area]



# Provisional Ballot Module

To begin you can enter in the voters Last Name and first name and then click **Link to Voter**.

If the voter is in the system it will auto-fill all current address data.

The image displays two screenshots of the 'Provisional Ballot Detail' form. The left screenshot shows the initial state where the user has entered the voter's name (Last Name: SJOLUND, First Name: CASEY) and is about to click the 'Link To Voter' button. The right screenshot shows the form after the voter has been found, with address data auto-filled. A blue arrow points from the 'Link To Voter' button in the left screenshot to the right screenshot.

**Left Screenshot (Initial State):**

- Name:** Last Name: SJOLUND, First Name: CASEY, Middle Name: [Empty]
- Address Provided:** Non-Standard [Clear]
- Mailing:** Country: UNITED STATES OF AMERICA, USA [Checked]
- Process:** Provisional Ballot Reason, Ballot Disposition, Ballot Disposition Reason, Method of Voter Notification: Mail
- Buttons:** Issue Ballot, Reprint, Coversheet, View Voter Record, Save And New, Save, Close

**Right Screenshot (Auto-filled State):**

- Name:** Last Name: SJOLUND, First Name: CASEY, Middle Name: L
- Address Provided:** Standard [Clear], House #: 1326, Suffix: [Empty], Pre Dir: [Empty], Street Name: WAUKESHA, Type: AVE, Post Dir: [Empty], Unit Type: [Empty], City/St/Zip: HELENA, MT, 59601, County: LEWIS & CLARK, Precinct: PCT 06, Split: P06.4
- Mailing:** Country: UNITED STATES OF AMERICA, USA [Checked]
- Process:** Provisional Ballot Reason, Ballot Disposition, Ballot Disposition Reason, Method of Voter Notification: Mail
- Buttons:** Issue Ballot, Reprint, Coversheet, View Voter Record, Save And New, Save, Close

# Provisional Ballot Module

If the voter is a transfer registrant the previous county and previous precinct will automatically fill (new 2016). You will need to select an election to issue the ballot out of, once you do that the ballot style will auto-fill.

Provide a Provisional Ballot Reason and then click **Issue Ballot** and then **Coversheet**.

The screenshot shows the 'Provisional Ballot Detail' web application interface. The form is divided into several sections:

- Name:** Last Name (SJOLUND), First Name (CASEY), Middle Name (L), Date of Birth (01/22/1980), Voter ID, and Suffix.
- Address Provided:** Standard (dropdown), House # (1326), Suffix, Pre Dir, Street Name (WAUKESHA), Type (AVE), Post Dir, Unit Type, City/St/Zip (HELENA, MT, 59601), County (LEWIS & CLARK), Precinct (PCT 06), and Split (P06.4). A 'Clear' button is present.
- Mailing:** Country (UNITED STATES OF AMERICA), USA (checked), and Address.
- Process:** Provisional Ballot Reason (County-to-County late registration in ele...), Ballot Disposition, Ballot Disposition Reason, and Method of Voter Notification (Mail).
- Previous County:** Big Horn (dropdown).
- Previous Precinct:** PRECINCT #1 - 1 (dropdown).
- Election:** 01/19/2016 Test Federal Primary Po (dropdown).
- Ballot Style:** PCT 06 (dropdown).
- Comments:** A text area for entering comments.
- Districts:** A table listing districts with Code and Description.

At the bottom, there are buttons for 'Issue Ballot', 'Reprint', 'Coversheet', 'View Voter Record', 'Save And New', 'Save', and 'Close'. There are also checkboxes for 'Approved' and 'Not Approved'.

Code	Description
CONG	CONGRESSIONAL
MT	Montana
PS 05	Public Service Commiss
JD 01	Judicial District 1
SCJ	SUPREME COURT JUSTI
SD 40	Senate District 40
HD 079	House District 79

# Provisional Ballot Module

Here is an image of the Provisional Ballot Cover Sheet/Outer Envelope for the voter.



Provisional Ballot Cover Sheet/Outer Envelope

ENVELOPE TO BE FILLED OUT AT POLLING PLACE OR ELECTION OFFICE BY ELECTION JUDGE/OFFICIAL AND ELECTOR AND PROVIDED TO ELECTION ADMINISTRATOR WITH POLLING PLACE MATERIALS

**PART 1: TO BE COMPLETED BY ELECTOR:**

PRINTED NAME: SJOLLUND, CASEY L FORMER NAME IF APPLICABLE: \_\_\_\_\_

MONTANA DRIVER'S LICENSE OR STATE ID NUMBER: 0105419804122

If you DO NOT have a Montana Driver's License number, provide last four digits of your Social Security number: \_\_\_\_\_

Date of Birth: 01/22/1980 Phone Number(s): (H) \_\_\_\_\_ (O) \_\_\_\_\_ (Cell) (218) 310-2922

Residence Address(address/city/zip): 1326 WAUKESHA AVE/HELENA/59601

Additional information if any regarding your voter registration that would help resolve the provisional ballot: \_\_\_\_\_

I (signature of elector) swear or affirm that I am eligible to vote in this election and precinct, that all of the information I provided on this form is true to the best of my knowledge and belief and that I am aware of the penalty for false swearing.

**PART 2: TO BE COMPLETED BY ELECTION JUDGE/OFFICIAL: PRECINCT/WARD/DISTRICT NAME/#** PCT 06  
**BALLOT STYLE** PCT 06

Elector was instructed to cast a provisional ballot for the following reasons: *(check all that apply)*

<input type="checkbox"/> Name not in official register and not erroneously omitted	<input type="checkbox"/> Register indicates provisionally registered, which could not be resolved
<input type="checkbox"/> Elector claims registration with Motor Vehicle Division or other government agency, which could not be confirmed	<input type="checkbox"/> Elector affirmed that absentee ballot was not received, or was spoiled, lost or destroyed
<input type="checkbox"/> Elector failed to sign register	<input type="checkbox"/> Elector's identification was insufficient
<input type="checkbox"/> Elector failed to sign absentee ballot envelope	<input checked="" type="checkbox"/> County-to-county late registration in election office
<input type="checkbox"/> Elector's absentee signature was not verified	<input type="checkbox"/> Precinct-to-precinct late registration in election office
<input type="checkbox"/> Elector's right to vote was challenged	<input type="checkbox"/> Other

ELECTION JUDGE/ELECTION OFFICIAL SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

**PART 3: TO BE COMPLETED BY ELECTION OFFICIAL RESOLVING PROVISIONAL BALLOT:**

Elector registered in Precinct/Ward/District Name/# \_\_\_\_\_ Voted in Precinct/Ward/District # \_\_\_\_\_

Voter ID# \_\_\_\_\_

Provisional Ballot Accepted: Yes  No

Reasons Ballot Accepted: <i>(circle all that apply)</i>	Reasons Ballot Was Rejected: <i>(circle all that apply)</i>
Name omitted from register in error	Not registered: <i>(circle, if applicable: canceled/ wrong precinct, district, ward / wrong county)</i>
Motor Vehicle or other government agency error	Motor Vehicle or other government agency has no record of registration
Elector provided signature	Elector never provided signature
Elector signed absentee ballot envelope	Elector never signed absentee ballot envelope
Elector's absentee signature was verified	Elector's absentee signature was never verified
Challenge resolved in challenged elector's favor	Challenge resolved in challenger's favor
Provisional registration was resolved	Provisional registration was not resolved
Absentee ballot not received	Absentee ballot received and accepted
Elector provided sufficient identification	Elector never provided sufficient identification
Confirmed that county-to-county late registrant did not vote in prior county	Confirmed that county-to-county late registrant voted in prior county
Confirmed that precinct-to-precinct late registrant did not vote in prior precinct	Confirmed that precinct-to-precinct late registrant voted in prior precinct
Other:	Other:

Processed by \_\_\_\_\_ Date processed for resolution: \_\_\_\_\_ Date voter notified \_\_\_\_\_

# Provisional Ballot Module – Resolving provisional ballots

## Search on previous County

**Provisional Ballots Search** [Voter Search](#) [Help](#)

**Search**

Last Name:  First Name:  Middle Name:  Date of Birth:

Election: 11/09/2011 22 MUNICIPAL Ballot Disposition:  Ballot Disposition Reason:  Previous County: Missoula

**Voting County Search Scope**  
 State  County: Big Horn Provisional Ballot Reason:

Approved  Not Approved  Include Confidential

**Residence County Search Scope**  
 State  County: Big Horn

**Search Results**

Name	Present Address	Date of Birth	Election	Prov. Ballot Reason	Ballot

The screenshot shows the 'Provisional Ballots Search' application window. It features a search form with several fields and a 'Search Results' table. Three callout boxes with arrows point to specific elements:

- a.** Points to the 'Previous County' dropdown menu.
- b.** Points to the 'Voting County Search Scope' radio buttons, specifically the 'State' option.
- c.** Points to the 'Residence County Search Scope' radio buttons, specifically the 'State' option.

The 'Search Results' table is currently empty and has the following columns:

Name	Present Address	Date of Birth	Election	Ballot Reason	Ball

At the bottom of the window, there are buttons for 'New', 'Details', 'Delete', 'Statistical Export', 'Report', 'Export', and 'Close'.

Enter your county in **Previous County** (a). Change Voting County to **State** (b). Change Residence County to **State** (c).

Clicking Search will bring up a list of voters that have moved from your county and been issued a provisional ballot in another county.

# Provisional Ballot Module

**Provisional Ballot Detail** [Voter Search](#) [Help](#)

**Name**

Last Name:  First Name:  Middle Name:

Date of Birth:  Voter ID:  Suffix:

**Address Provided**

House #:  Suffix:  Pre Dir:  Street Name:  Type:

Post Dir:  Unit Type:

City/St/Zip:

County:  Precinct:  [Split](#)

Previous County:

Previous Precinct:

Election:

Ballot Style:

**Process**

Provisional Ballot Reason:

Ballot Disposition:

Ballot Disposition Reason:

Method of Voter Notification:

Approved  Not Approved

**Comments**

**Districts**

Code	Description
CONG	CONGRESSIONAL
MT	Montana
PS 02	Public Service Commiss
SCJ	SUPREME COURT JUSTI
JD 22	Judicial District 22
SD 21	Senate District 21
HD 042	House District 42

# Provisional Ballot Module – Resolving provisional ballots

**You must complete the approval/not approved process before 3 p.m. on the Monday following the Election Day.**

And back to.....

# **ELECTION MANAGEMENT**

- Official Register Print/Process
- Election Results
- Duplicate Ballot Report
- Closing the Election

# Election Management

## Official Register

The official register is what you will print and provide to the polling places. This is typically pulled the week before the date of the election, but for training purposes you will pull it today.

Click on the **Pull Voters** and on the next pop-up select how you would like the register to be organized. During Federal Elections, you will likely want to select **By Polling Place**.

The screenshot displays the 'Election Management' application window. The title bar includes 'Election Management' and standard window controls. The menu bar contains 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main content area is divided into a header and a main body. The header shows 'Election Date: Jun-07-2016', 'Election Type: Federal Primary', and 'Description: Test Fed. Primary'. The main body contains a list of navigation links on the left and a large pink message box in the center. The message box states 'Official Register Not Pulled.' Below the message box, there is a 'Process Completed' checkbox and three buttons: 'Pull Supplemental', 'Pull Voters', and 'Print'. A 'Refresh Wizard Status' link is located at the bottom left of the main content area.

**Election Management**

Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

[Voter Search](#) [Help](#)

**Election Date: Jun-07-2016 Election Type: Federal Primary Description: Test Fed. Primary**

- ✓ [Election Details](#)
- ✓ [Include Certified Contests](#)
- ✓ [Pull Contests](#)
- ✓ [Issues & Offices](#)
- ⚠ [Publish Certified Contests](#)
- [Ballot Styles](#)
- [Ballot Review](#)
- ⚠ [Print Labels](#)
- [Official Register](#)**
- [Election Expenses](#)
- [Election Results](#)
- [Process Official Register](#)
- [Duplicate Ballot Report](#)
- ⚠ [Close Election](#)
- [Exit](#)

[Refresh Wizard Status](#)

**Official Register Not Pulled.**

Process Completed

[Pull Supplemental](#) [Pull Voters](#) [Print](#)

# Election Management

## Official Register

The official Register is now generated. Normally you would then print these registers out and prepare them for the polling place.

You will also want to pull your supplemental registers before the election. It is not necessary in this training since no new additions/deletions have occurred.

Check **Process Completed**.

The screenshot shows the 'Election Management' software interface. At the top, there is a navigation menu with options: Ballot Styles, Address Library, Pull Petitions, Polling Places, CASS, Districts Precincts, and Reports. A status message reads: 'Official Register created successfully. (Please 'Refresh Wizard Status'.)' with links for 'Voter Search' and 'Help'. Below this, a header bar displays: 'Election Date: Jun-07-2016', 'Election Type: Federal Primary', and 'Description: Test Fed. Primary'. A left-hand sidebar contains a list of actions: 'Election Details' (checked), 'Include Certified Contests' (checked), 'Pull Contests' (checked), 'Issues & Offices' (checked), 'Publish Certified Contests' (warning icon), 'Ballot Styles', 'Ballot Review', 'Print Labels' (warning icon), 'Official Register' (highlighted), 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election' (warning icon), and 'Exit'. The main content area shows a table titled 'Official Register Pulled by Polling place (Combined Statuses) on 04/28/2015'. The table has three columns: 'Location', 'Pages', and 'Print Date'. The data rows are: BASIN SCHOOL (27), ELK PARK FIRE HALL (13), COMMUNITY HALL - WHITEHALL (327), VOLUNTEER HALL-FAIRGROUNDS-BOULDER (180), JEFFERSON CITY COMMUNITY HALL (70), MONTANA CITY SCHOOL (319), and CLANCY MUSEUM (226). At the bottom of the interface, there are checkboxes for 'Select All' and 'Process Completed', and a text field showing 'Total Number Of Official Register Pages : 1155'. Action buttons for 'Pull Supplemental', 'Regenerate Official Register', and 'Print' are also visible.

Location	Pages	Print Date
BASIN SCHOOL	27	
ELK PARK FIRE HALL	13	
COMMUNITY HALL - WHITEHALL	327	
VOLUNTEER HALL-FAIRGROUNDS-BOULDER	180	
JEFFERSON CITY COMMUNITY HALL	70	
MONTANA CITY SCHOOL	319	
CLANCY MUSEUM	226	

# Election Management

## Official Register

County: Jefferson		Official Register List				Date: 03/06/2017
Polling Place List						
Election: Test/Election Polling Place - 04 PARR F002 0001						
Line Number	Registration ID Number	Practiced Split	Ballot Style	Birth Date Voter Name Residential/Planning Address	Voter Signature	
Polling Place - 04 PARR F002 0001						
1	00002 Polling	PR001.00 01.00	7	03-10-1978 SCHNEIDER, MICHAEL J 2 MILLER CREEK RD BUTTE MT 59701 PH:	_____	
2	00027 Polling	PR001.00 01.00	7	03-10-1978 SCHNEIDER, LAWRENCE 2 MILLER CREEK RD BUTTE MT 59701 PH: 409-4-8000000 OR 409-409-40000	_____	
3	00107 Polling	PR001.00 01.00	7	03-10-1980 SMITH, ALDEN 20 WASHINGTON RD BUTTE MT 59701 PH:	_____	
4	00070 Polling	PR001.00 01.00	7	03-10-1980 SMITH, BRUCE D 20 WASHINGTON RD BUTTE MT 59701 PH:	_____	
5	00067 Polling	PR001.00 01.00	7	03-10-1981 SMITH, BRUCE D 20 WASHINGTON RD BUTTE MT 59701 PH:	_____	
6	00170 Polling	PR001.00 01.00	7	03-10-1980 SMITH, BRUCE 270 S 6th RD BUTTE MT 59701 PH:	_____	
7	00080 Polling	PR001.00 01.00	7	03-10-1980 SMITH, BRUCE 270 S 6th RD BUTTE MT 59701 PH:	_____	

EXAMPLE:

# Election Management

## Election Expenses

This portion of the Election Management module is still in development, you can mark this **Process Complete** and move to the next menu item.

**Election Management**  
Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

**Election Date:** Jun-07-2016    **Election Type:** Federal Primary    **Description:** Test Fed. Primary

[Voter Search](#) [Help](#)

**Election Expenses** | District Cost Distribution | Election Districts | Remaining :

**Printing**

Expense Item	Actual Cost	Actual 5%
Ballots	\$0.00	\$0
Punchcards	\$0.00	\$0
Master List	\$0.00	\$0
Inserts	\$0.00	\$0
Letters	\$0.00	\$0
Acceptance of Office	\$0.00	\$0
Poster/Signs	\$0.00	\$0
Certificate of Notification	\$0.00	\$0
Certificate of Election	\$0.00	\$0
Challenge Forms	\$0.00	\$0
Replacement Ballot Form	\$0.00	\$0
Voter's Pamphlet	\$0.00	\$0
VBM - Mailer Envelope	\$0.00	\$0
VBM - Return Envelope	\$0.00	\$0
VBM - Secrecy Envelope	\$0.00	\$0
Materials for Election Personnel Trainin	\$0.00	\$0
Other	\$0.00	\$0
Close of Registration	\$0.00	\$0
Notice of Election	\$0.00	\$0
Notice of Filing for Office	\$0.00	\$0
Notice-Absentee Ballots Available	\$0.00	\$0
Display Ad	\$0.00	\$0

Group Total: \$0.00    Actual Total: \$0.00    [Calculate Totals](#)

Process Completed    Expense Group : 1/9    [Save](#)    [Previous](#)    [Next](#)

[Refresh Wizard Status](#)

**Navigation Menu:**

- Election Details
- Include Certified Contests
- Pull Contests
- Issues & Offices
- Publish Certified Contests
- [Ballot Styles](#)
- [Ballot Review](#)
- Print Labels
- [Official Register](#)
- [Election Expenses](#)
- [Election Results](#)
- [Process Official Register](#)
- [Duplicate Ballot Report](#)
- Close Election
- [Exit](#)

# Election Management

## Election Results

You can enter the election results data into this menu item. Winners entered here will automatically be brought into the Federal General Election, and winners of the General will be brought into the Districts and Precinct position holders. In turn these individuals will be available to be brought back into your next election cycle and will be defaulted as incumbents.

You can only enter results for candidates/races that are included in your jurisdiction.

The screenshot shows the 'Election Management' application window. The title bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main content area is titled 'Election Date: Jun-07-2016', 'Election Type: Federal Primary', and 'Description: Test Fed. Primary'. There are two tabs: 'Issues Results' and 'Offices Results'. The 'Offices Results' tab is active, showing a table with columns for 'Offices', 'Winner', and 'Votes Received'. The table contains 15 rows of office names, each with a dropdown menu for the winner and a text input for votes received. A 'Refresh Wizard Status' link is at the bottom left, and a 'Process Completed' checkbox and 'Save' button are at the bottom right.

Offices	Winner	Votes Received
STATE SENATOR DISTRICT 38	...	
UNITED STATES REPRESENTATIVE	...	
ATTORNEY GENERAL	...	
SUPREME COURT JUSTICE #3	...	
STATE REPRESENTATIVE DISTRICT 71	...	
County Commissioner District 1	...	
STATE SUPERINTENDENT OF PUBLIC INS	...	
STATE REPRESENTATIVE DISTRICT 75	...	
SUPREME COURT CHIEF JUSTICE	...	
PRESIDENT	...	
SECRETARY OF STATE	...	
STATE AUDITOR	...	
STATE SENATOR DISTRICT 36	...	
Clerk of the District Court	...	
PUBLIC SERVICE COMMISSIONER, DISTF	...	

This section is different than eSERS. It is mainly used to make your next election cycle easier. It is not mandatory, but it is recommended.

# Election Management

## Process Official Register

Select the Polling place of the Register you are trying to process. You can either, scan in the barcode, or click the box next to the voters name.

Each page in the Register in MT Votes will correspond with paper copy of the register.

**Election Management**  
Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

You are on the first page. [Voter Search](#) [Help](#)

Election Date: Jun-07-2016 Election Type: Federal Primary Description: Test Fed. Primary

Official Register:  Polling Places:  Barcode:

Page No:

Accepted	Voter Name	Residential Address	Absentee Sent/Recd Date
<input type="checkbox"/>	AABERG, CATHERINE D	191 CLANCY CREEK RD CLANCY, MT 59634	
<input type="checkbox"/>	AABERG, GUS E	191 CLANCY CREEK RD CLANCY, MT 59634	
<input type="checkbox"/>	AABERG, KERRIE L	29 OHIO GULCH RD CLANCY, MT 59634	
<input type="checkbox"/>	AABERG, WILLIAM C	29 OHIO GULCH RD CLANCY, MT 59634	
<input type="checkbox"/>	ABERLE, PATRICK P	51 AMBUSH RDG CLANCY, MT 59634	
<input type="checkbox"/>	ADAMS, EDWARD	11 PINE RIDGE CIR CLANCY, MT 59634	
<input type="checkbox"/>	ADAMS, FRANK	53 AMBUSH RDG CLANCY, MT 59634	

Page 1 of 235

Process Completed

[Refresh Wizard Status](#)

We recommended that you **Print Processed Voters** and save a copy to your folder. This is a great way to have a list of all polling place voters who participated in your election.

# Election Management

## Duplicate Ballot Report

This section of Election Management will bring back anyone who appears to have two ballots. If you have any voters listed here you will want to run the **Report**, for your records, and look into each voter.

The screenshot shows the 'Election Management' application window. The title bar reads 'Election Management'. Below the title bar, there are menu items: 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main content area has a pink header with the text 'You are on the first page.' and links for 'Voter Search' and 'Help'. Below the header, there is a summary bar with 'Election Date: Jun-07-2016', 'Election Type: Municipal Primary', and 'Description: Test Election'. The main area contains a table with the following data:

Voter...	Current Residential Address	No of Ballots
<input type="checkbox"/> JOH...	80 SILVER BELL RD , BOULDER, MT 59632	2
<input type="checkbox"/> CAR...	29 QUARTZ CIR , CLANCY, MT 59634	2
<input type="checkbox"/> REE...	7 SILVER BELL RD , BOULDER, MT 59632	2
<input type="checkbox"/> BOE...	5 MIDDLE LOOP RD , CLANCY, MT 59634	2

On the left side, there is a navigation menu with the following items: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. At the bottom, there is a control bar with a 'Refresh Wizard Status' link, a 'Process Completed' checkbox, and buttons for 'Report...', 'Voter Reg', 'View Ballots', 'Select All', and 'Save'.

# Election Management - Data

Before closing your election I would recommend running a handful of reports, exports, and searches. This is the best time to get an excellent snapshot of your actual election. Some data that I would pull out of MT Votes:

## **EXPORTS:**

- **EX-E01 (Export for Absentee Voters in an Election).** All Precincts, All Absentee Types, All Ballot Stages.
- **Provisional Ballot Export** – This export can be located in the Provisional ballot module.
- **Through Voter Search – All Late Registrants** - As soon as you close your election, these voters get changed to Active. If you want this data, you must run this report before you close.

## **Reports:**

- **Print Processed Voters** – This report is located within the Process Official Register section of Election Management.
- **Duplicate Ballot Report** –
- **BP-004 – Ballot Statistics by Ballot Style** - Run this for the election and all ballot styles.

# Election Management

## Close Election

To close the election, you simply need to click the **Post History for Processed Voters and Close Election**.

You will be prompted to run the VR-022 (Late Reg. Statistics report) and the BP-020 (Duplicate ballot report).

The screenshot shows the 'Election Management' application window. The title bar includes 'Election Management' and standard window controls. Below the title bar is a navigation menu with items: 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main content area has a header with 'You are on the first page.' and links for 'Voter Search' and 'Help'. Below this is a summary bar: 'Election Date: Jun-07-2016', 'Election Type: Municipal Primary', and 'Description: Test Election'. A left sidebar contains a list of menu items: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The 'Close Election' item is highlighted with a yellow background. The main content area contains a text box with instructions: 'Clicking on 'Post history for processed voters and Close election' button will allow you to save history for voters who were processed in the 'Process Official Register' link and also allow you to close the election and prevent further edits to the election.' At the bottom, there is a 'Process Completed' checkbox, a 'Reopen Election' button, and a 'Post History for Processed Voters and Close Election' button. A 'Refresh Wizard Status' link is located at the bottom left of the sidebar.

# Questions -

