MT VOTES – Absentee Maintainence

2014 Election Official Certification Training

February 2014
Absence Maintenance

• This training will walk the user through:
  – Setting up county specific system defaults for absentee ballot processing in the System Configuration module
  – Issuing an absentee ballot through the Voter Registration module
  – Issuing an absentee ballot through the Absentee Maintenance module
SYSTEM CONFIGURATION

To ensure the most efficient entry and tracking of Absentee requests it is important that system configuration be set up to accommodate your counties’ preferred defaults.

Click on the System Configuration link to begin.
Setting Absentee Defaults

Select the link for COUNTY CONFIGURATION to access the list of default options.
Click on the link for **County Parameters** to view a list of all available options for your county.
• To view all available option values you will need to resize the Parameter Name Field.

• Click and hold on the separator and drag your cursor to the right to expand the field.

• You will have to use the scroll bar to move back and forth to view all entries.
Default Absentee Application Source

Examples: 0 = Blank, 4 = E-mail, 5 = Fax, 6 = In-Person, 7 = Mail, etc...

Enter the Corresponding number in the Parameter Value field for the default source you would like. (e.g. if most of your absentee application are received in-person, make in-person your default.)

Click Save.

The corresponding location this will populate in the Absentee Application Source field found in the Absentee Detail screen, which is accessible through Voter registration (see slide next page).
Default Absentee Application Source
Default Absentee Label

(A dropdown list of your counties’ configured Flex Labels)

Choose the Corresponding label type in the Parameter Value field drop down box for the default label type you would like to use.

Click Save.

The corresponding location this will populate in is the select label field found in the Issue Ballot Request screen, which is accessible through Voter registration (see slide next page).
Default Absentee Label
Default Ballot Processing Source

Examples: 0 = Blank, 3 = Email, 5 = In-Person, 6 = Mail, etc...

This field specifies which method the absentee ballot was received through. Enter the Corresponding number in the Parameter Value field for the default source you would like. **Click Save.**

The corresponding location this will populate in is the Source field found in the Process Ballot screen, which is accessible in the Ballot Processing screen. (see slide next page).
Default Ballot Processing Source
Default Election for Absentee Request

(0 = No Election Selected, 1 = Current Active Election)

Enter the Corresponding number in the Parameter Value field for the default source you would like.

You should always have the 1 = Current Active Election selected so that the current election always defaults for the absentee request- you can always change it if it is for another election.

Choosing option 0 = No Election Selected will cause the system to not populate any election. You will have to manually choose the appropriate one each time.

Click Save.

The corresponding location this will populate in is the Election field found in the Absentee Detail screen, which is accessible through Voter registration.

(see slide next page)
Default Election for Absentee Request
Default Election if Multiple Elections

• If you have multiple elections the first absentee entry will populate for the first election being held.

• The second absentee you process will be for the election that will be held after the first.

• The affected field as specified in the previous slide will be in the Absentee Detail screen, and multiple ballots can be viewed on the Active Election Ballots screen accessed through Voter Registration. (See next slide)

• The System will auto fill the election in, if you have the default set to 1.
# Multiple Elections

![Active Election Ballots](image)

## Election Name
- **Election Name**: 11/08/2011

## Active Ballots

<table>
<thead>
<tr>
<th>Ballot ID</th>
<th>Ballot Seq. #</th>
<th>County Tracking #</th>
<th>Sent Date</th>
<th>Received Date</th>
<th>Print Date</th>
<th>Residential Address</th>
<th>Ballot Style</th>
<th>Precinct</th>
</tr>
</thead>
<tbody>
<tr>
<td>450575864</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1 PARKDALE SUBD</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

## Ballots For Other Elections On 11/08/2011

<table>
<thead>
<tr>
<th>Election</th>
<th>County</th>
<th>Ballot ID</th>
<th>Ballot Seq. #</th>
<th>Sent Date</th>
<th>Received Date</th>
<th>Print Date</th>
<th>Residential Address</th>
<th>Ballot Style</th>
<th>Precinct</th>
</tr>
</thead>
<tbody>
<tr>
<td>EQ TEST SPECIAL ELEC</td>
<td>Big Horn</td>
<td>450575811</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1 PARKDALE SUBD</td>
<td>FORT SMITH, MT</td>
<td>12</td>
</tr>
</tbody>
</table>
Issue Method

Examples: 0 = Blank, 1 = In Person, 2 = Mail, etc...

This field species how your office has issued the Absentee ballot. Enter the corresponding number in the Parameter Value field for the default issue method you would like.

Click Save.

The corresponding location this will populate in is the Issue Method field found in the Absentee Detail screen, which is accessible through Voter Registration. (see slide next page).
Issue Method

![System Configuration and Voter Registration - Absentee Detail windows with highlighted issue method option]
Benefits of Setting Defaults in System Configuration

• When processing Absentees you are 2 clicks away from issuing a ballot if defaults are set up.

• If you have set defaults you can verify the address and quickly save the Absentee request without having to manually change the other fields each time.
ISSUING ABSENTEE BALLOTS FROM VOTER REGISTRATION

• Now that you have set up your defaults in System Configuration you have several options for entering new absentees.

• Absentee requests and issuing ballots can be done manually through Voter Registration.

Click **Voter Registration** to begin
Entering Absentee Status

Bring up the voter you are wanting to work on, or create a new voter if it is a new registrant.

Click the Absentee Tab.

In the Absentee Status drop down choose the appropriate Absentee Status Type.

UOCAVA electors should be entered as UOCAVA and not as “Absentee List”

Once the status as been entered click Add to create the new absentee entry.
Entering Absentee Type

When entering a new Absentee request you will have to specify which Absentee Type the voter is requesting.

All Absentee Types except for Election Specific are based off of a range of dates. Election Specific is only for the single Election Specified.
Entering Absentee List Date Ranges

For Absentee List requests the system will automatically populate an end date of 01/31 of the next even year.

This cannot be changed.

The From date will be the date the voter submitted their Absentee Request.
Entering An Election Specific Absentee Type

For Election Specific Absentee Types the date boxes will be replaced by an election drop down.

Choose the appropriate election for which the voter is requesting and absentee ballot.
Entering Civilian And Military Domestic or Overseas Absentee Date Ranges

For Military Domestic and both Civilian or Military Overseas Absentee Types the system will automatically populate an end date of 01/31 in the year after the next federal election.

This cannot be changed.
Entering Seasonal Date Ranges

For Seasonal Absentee types you are able to enter both From and To dates as specified by the voter.

The To date should not be a date greater then 01/31 of the next calendar year.

Multiple Seasonal Absentee date ranges can be entered, but none can overlap.
Entering Absentee Details

• Choose the appropriate Absentee Type.
• If Election Specific ensure the correct election is showing.
• For other types ensure the correct dates are showing.
• Verify the correct Absentee Application Source, Issue Method, and Date Requested are accurate.
• Verify the user’s address.
Issuing Absentee Ballot

Once Verified, choose how you want to save the record:

- Save and Issue Ballot (In-Person)
- Update and Save (Mail)
Automatically Issue a Ballot

- Choosing the **Save** and **Issue Ballot** option will automatically take you to the **Issue Ballot Request** screen, from which a ballot label can be printed immediately.
Manually Issue a Ballot

If you choose not to Save and Issue a ballot label from the Absentee Detail screen you can print a ballot label manually using the following steps.

1. Select Issue Ballot from the Election Menu.
2. Select Now under Print Label
3. Select the appropriate label
4. Click Print
5. Close the Window
ABSENTEE MAINTENANCE MODULE

• Batches of Absentee Requests, including annual absentee confirmations, can be entered quickly through the Absentee Maintenance Module.

• This module is used primarily for entering annual absentee list confirmations.

• Click the **Absentee Maintenance** link to begin.
Data Entry from Annual Absentee Confirmations

• Before entering a Voter ID from the annual confirmations you are working on, verify that the populated information is correct for everyone in the Batch.

• If not all requests are the same you will have to manually change the data entered before scanning or entering the voter ID.
• Once you have verified that all of the data entered is correct you will begin entering Voter ID’s from the annual confirmation notices.

• If a voter is entered with incorrect information you can delete and re-enter the request before clicking the Create Absentee button.
Voter Entry – Barcode/Manual

- Voter ID’s can be found on the voter label on the returned annual confirmation.
- In Absentee Maintenance, they can be entered manually or scanned in using a barcode scanner.
- To manually enter a Voter ID, first type in the Voter’s ID and then click the add button.
- Clicking in the Voter ID field and scanning the corresponding barcode will automatically add them to the list.
Entering Absentee Type and Status

Before clicking the add button ensure you have the appropriate absentee type and absentee status entered.
Create Absentee Spans for Listed Entries

- Once you have at least one entry showing in the list, and you have verified signatures from each voter’s Annual Confirmation, you can click the Create Absentee button to create the record for every voter showing.

The system will generate an Absentee Maintenance report once you’ve clicked the Create Absentee button and you click yes in the confirmation dialogue box.

This report cannot be regenerated. Click yes only when you are ready to print the report.
Recommendations

• Scan or enter 25 –50 cards 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 voters can be entered into the module, but a warning will display as any voter submitting an absentee application must first be changed to active status.
  – The action of applying for an absentee ballot automatically reactivates and inactive voter
New February 2014!

• When scanning a batch of absentee address confirmations into Absentee Maintenance, a batch number is assigned and will be captured on the absentee detail screen on the voter record, allowing for filing the forms by batch number instead of alphabetically or by voter ID.
  – Would work similar to the capture of batch number when scanning voter registration cards

• This should be a huge time saver for counties.
Issuing ballot when a voter is inactive.

- If a voter does need a ballot, but is inactive, you must first change their status to active and then ensure their absentee span is entered if they are applying for the absentee list.
Absence Reports

- The Absentee Maintenance Report will generate automatically when you click Create Absentee.
  - This report cannot be regenerated.
E-015 Absentee Type Date Range Report

• If you close out of the Absentee Maintenance Report without printing, an alternative report to run is the E-015 report.

• 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.
PULLING ABSENTEES FOR AN ELECTION IN ELECTION MANAGEMENT

• Absentee voters can be pulled into an election on the Ballot Styles screen.

• To begin click the Election Management link and view the details for your election.
Pull Absentees

- Click on Ballot Styles and click the Generate Styles Button if you have not already done so.
- Click Pull Absentees
- Choose All or the specific absentee types you want to pull in.
  - You should always pull all UOCAVA absentee types first
- Click Continue.
- Absentee Voters will now be pulled into your election.
Print Labels

• To print labels for your pulled Absentee Voters:

1. Click Print Labels
2. Enter Batch Info and Output Order
3. Specify Election Criteria or leave blank for all.
4. Choose print Now
5. Choose label
6. Click Print
Supplemental Labels

• If additional absentee requests are entered after you have pulled absentees on Ballot Styles, you will need to return to Print Labels and print your supplemental labels.

• Follow the same steps as the previous slide to print supplemental labels.
As always, please feel free to contact the Help Desk, at 1-866-541-6767, with any further questions you have.