Office of Montana Secretary of State
Linda McCulloch

Election Management
Updated March 2014
Overview Of Topics Covered In This Training Guide

• Creating a New Election
• Adding Issues and Offices
• Generating Ballot Styles
• Printing Absentee and Mail Ballot Labels
• Generating Official Register
• Processing Mail Ballots
• Processing Official Register
• Closing an Election
Election Management
Election Management– Creating a New Election

• Election Management is the first screen that will display.

• From this screen you can search on existing elections.

• For existing elections you can view election Details, Delete an election, or Cancel an election.

• Click **New** to create a new election.
Election Details–
Election Date

• Enter Election Date in MM/DD/YYYY fashion.
Election Details–
Election Description

- Enter in an Election Description using standard election naming conventions.

i.e., County Code (same as used on license plates), Type of Election, year of Election

Example:
11 Municipal General 2013
Election Details–
Election Type

- Select an **Election Type** from the dropdown box.
Election Details–Election Method

- Select an **Election Method** from the dropdown box.
Election Details–
Closing Date for Registration

- Enter the Closing Date for Registration in MM/DD/YY format.
Election Details–
System Populated Dates

- Verify that all system populated dates are showing correctly.
- Note: the “filing deadline” field is being removed from this screen.
- Fields to verify:
  - Official County Canvass Votes Date
  - Poll Hours
  - Publication dates
Election Details—Save Election Details

- Verify that you have entered in all of the Election Details
- Check the Process Completed box.
  - A green checkmark will display next to election detail to indicate it is completed.
- Click the Save button.
Election Details–
Save Election Details

• A message will display to confirm that the election has been saved.

• Election Details will now show at the top of the screen.

• Click
Refesh Wizard Status
Helpful Hint—

• Any time **Process Completed** has been checked, **Always** click **Refresh Wizard Status** for an updated view of what has been accomplished.
Include Certified Contests—Overview

- The Include Certified Contests screen allows you to accept shared contests from either the State or other counties.
- If contests are available you can click on them and click Save to bring them into your election.
- Note: in the future, you will not be able to generate ballot styles until you have done this step.
- Click Process Completed when finished with this screen.
- Refresh Wizard Status

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Pull Contests—Overview

• The Pull Contests screen will display a list of available contests that have been set up with your Districts and Precincts.

• Check the box next to the desired Positions and click **Save** to pull them into your election.

• Click **Process Completed** when finished with this screen.

• **Refresh Wizard Status**
Issues & Offices –
Creating New Office

• If your election includes contests or issues that were not able to be pulled into your election from earlier steps you will have to enter them manually.

• Click **New** to begin.
Issues & Offices –
Election Offices

- Select the District Type from the Dropdown box.
Issues & Offices –
Election Offices

• Select the desired District from the Dropdown box.

• Verify that you have selected the correct District Type if the district you need is not showing.
Issues & Offices –

Election Offices

• Available Positions within the selected district will be displayed.

• Choose which position you are including in your election.

• Enter in the Political party and Vote For Number.

• Do not EVER use the Is Primary checkbox.

• Click **Save** to continue.

• Click **Save & Add** New to add in additional offices.
Issues & Offices –
Creating New Offices

• Your new office will now display on the Issues & Offices screen.

• Repeat the previous steps to add in additional contests if needed.
Issues & Offices – Adding Candidates

• Once your offices have been added, you can add in candidates as needed.

• Highlight the office you are adding a candidate to and click New under Candidates to begin.
Issues & Offices – Adding Candidates

- On the following screen enter the candidate information and click Link to Voter.

- The candidate’s information will automatically populate if a matching voter record is found.
Issues & Offices – 
Adding Candidates

- Select Political Party, check if an incumbent and add contact information.
- Note: in the future, you MUST select the political party of the candidate in order to Save.
- Ballot name now defaults to First and Last, but you must input a nickname if it will appear on the ballot.
Issues & Offices –
Validating Candidates

• To validate the candidate you will first need to check that they Satisfy Eligibility Requirements.

• System requirements will be checked automatically if the candidate qualifies.

• Click Validate Candidate.
Issues & Offices – Adding Candidates

- Click **Save** to add the new candidate to your election.

- If you have multiple candidates to add click **Save & New** to reset the screen and add them.
Issues & Offices – Adding Candidates

- The new candidate will now display for the selected office.

- Repeat the previous steps to add additional candidates if necessary.
Issues & Offices – Certify Candidates

- **New** - Candidates will now default to Certified status.
- To confirm this, view the candidate’s detail screen.
Issues & Offices – Certify Candidates

• In the Status field it should display certified.
Verify all candidates are showing with the correct party and that their status is “certified”. (Highlight the candidate and select “details”)

Note: if a candidate is later determined by the CPP to be ineligible, or if a candidate withdraws, you must remember to go in and change “certified” to “filed” before finalizing candidates.
Issues & Offices –
Creating New Issues

- Click the **New** button under Issues to add in a new local ballot issue to your election.
Issues & Offices – Creating New Issues

- Enter a unique Issue Number and select the District Type and District from the corresponding dropdown boxes.
Issues & Offices –
Creating New Issues

• Enter a Caption for the issue.

• Enter the question wording for the issue into the Summary field.

• Verify all information is showing correctly and click Save.

• Click Save & Add new to continue adding additional issues.
Issues & Offices – Overview

- The new issue will show along with any other issues or contests you have added.

- Once you have finished adding all contests and issues check the **Process Completed** box.

- **Refresh Wizard Status**
Publish Certified Contests—Overview

- The Publish Certified Contests screen allows you to share offices and issues you have entered with other counties that have shared districts.

- Check entries and click save to share them.

- Otherwise Check Process Completed

- Refresh Wizard Status
Ballot Styles – Generate Styles

- The next step to set up your election is to Generate Ballot Styles.

- You will need to Refresh Wizard Status if you have not been doing it after each prior step.
Ballot Styles – Generate Styles

- Click the **Generate Styles** button to generate ballot styles.
- The following message will display, warning you that your election details will no longer be modifiable if you continue.
- Click **Yes** when ready.
Ballot Styles –
Generate Styles

• You will next be asked if you want to generate Ballot Styles by Precinct.

• If so click Yes.

• Clicking No will generate Ballot Style by District.
Ballot Styles – Generate Styles

- Newly generated Ballot Styles will be listed under styles.

- A confirmation will display at the top of the screen.

- Ballot styles will generate with a default number for a name.

Default ballot style names (the number assigned by the system) do not correspond to a precinct number.

Refer to the precinct box to verify the ballot styles information.
Ballot Styles – Resync Voter

Once ballot styles have been generated MT Votes automatically re-syncs whenever new voters are registered to ensure all eligible voters are included in an election.

This process can be forced to run manually by clicking the resync voter button.
Ballot Styles – Generate Styles

- Ballot Styles can be renamed so as to be more easily recognizable.

- Click on the Ballot Style you would like to rename and then enter a new name under Style Details.

- Be sure to click Save after changing each style name or your modifications will be lost.
Ballot Styles – Generate Styles

- A confirmation message will display after each ballot style name is changed.

- The re-named ballot styles will be listed under Style.

  - Once a name has been used for a ballot style it cannot be applied to an alternative ballot style.
Ballot Styles – Pull Absentees

• Next you will need to pull absentee voters into the election.

• This button will have different functionality depending on whether you are setting up a Poll or Vote-by-Mail Election.
Ballot Styles – Pull Absentees

Poll Election

• Clicking the Pull Absentees button will only pull voters with absentee requests on file and voters on the current absentee list.
Ballot Styles – Pull Absentees

Poll Election

• A dialogue box will come up, allowing you to specify which absentee types you would like to pull.

• **Note:** for federal elections, ALWAYS pull the 3 UOCAVA types first.

• Click **Continue**
Ballot Styles – Poll Absentees

Poll Election

• Absentees will be pulled into the election.

• The following confirmation will display.

• Check Process Completed.

• Refresh Wizard Status
Ballot Styles –
Pull Absentees
Vote-By-Mail Election

- Clicking the Pull Absentee button for a vote-by-mail election will pull in all Active voters.

- Inactive voters will not be pulled into the mail ballot election initially, but can reactivate and then be mailed a ballot.

- Click Pull Absentees
Ballot Styles – Pull Absentees

Vote-By-Mail Election

• Note that the Pulled Voter count does not match the totals indicated by the ballot styles.

• This is because the ballot styles include all active and inactive voters, whereas only active voters are pulled into a mail ballot election.
Ballot Styles – Pull Absentees

Vote-By-Mail Election

• A confirmation message will display at the top of the screen.

• Check Process Completed.

• Refresh Wizard Status
Ballot Review – Overview

- The Ballot Review screen will list all issues and offices that have been set up in the election.

- Only Certified Candidates will be displayed. *make sure that you have changed the status if a candidate becomes ineligible so that they are not included on the ballot.

- After reviewing this screen check Process Completed.

- Refresh Wizard Status
Print Labels—Overview

• The Print Labels screen functions the same for both Poll and Vote by Mail elections.

• Click Label Printing to begin
Print Labels—Label Printing

- Enter a Batch # and Description.

- The mailing date must be changed to the date you will actually be mailing the ballots.
  - It will default to the system date, but must be changed to the actual mailing date so that the My Voter Page service reflects the correct mailing date.
Print Labels—Label Printing

• Under Selection Criteria you can choose which label types to include in your batch.

• Not selecting anything will include all labels in the batch.

• The Search button will tell you how many labels will be printed.
Print Labels–Label Printing

- Under Output Order, you can specify what sort order you would like your labels to have.

- Output Type allows you to specify Print Now or to Print to File, and which label type you would like to use.
Print Labels—Label Printing

• Specify the number of copies you would like once you have entered Output Order and Type, and you have chosen the label type.

• Click Print
Print Labels– Label Printing

• A report will generate containing your labels.

• Verify that the correct label type was chosen.

• Click **Print**
Print Labels–Label Printing

- Choose the printer you would like to print to.
- Click Print
Print Labels—Label Printing

• Once the labels have printed click Close.
Print Labels–Overview

- If additional voters are registered after printing labels they will show up as Supplemental labels waiting to be printed.

- Once all labels have been printed and you will have no more check Process Completed.

- Refresh Wizard Status
Inactive Electors in a Vote by Mail election– Overview

If an inactive elector requests a ballot, or mails in or brings in a voter registration card (or other document listing the elector's current residence address) before the ballots are mailed, change their status to “Active” and send the person a ballot along with the rest of the mail ballots.
Inactive Electors in a Vote by Mail election–

Overview

If an inactive elector requests a ballot, or mails in, or brings in a voter registration card (or other document listing the elector's current residence address) after the day on which you mailed your ballots, change their status to “Active” and provide them with a ballot in person or by mail.

You do not need to have them fill out a Replacement/Late Ballot Request since they, by following 13-2-222, MCA, are activating their registration and are therefore automatically eligible for a ballot.
Inactive Electors in a Vote by Mail election—

Overview

AFTER Activating the elector -

• The system will ask if you want to resync. Select Yes.

• In Election Management/Print Labels, the label for this voter will be waiting for you to print.
Late and Late Transfer Registrants in a Vote by Mail election

• By law, a late or late transfer registrant must come into your office if the individual wishes to register after the close of regular registration.
Late and Late Transfer Registrants in a Vote by Mail election: BEFORE Ballot Mailing

- If a late registrant comes in to register before the ballots are mailed, register them in the system and follow the procedures in 13-19-303, MCA.

- Allow them to vote in your office until noon the day before the ballots are mailed.
Final Steps for Handling Late and Transfer Registrants in a Vote by Mail election

• After late or transfer registration has been entered, system will ask if you want to resync. Select yes.

• Then go to Print Labels in Election Management, and the system will display how many labels will be waiting to be printed for this election.
Do not extend address ranges after you have printed labels. New ballots will be prepared for all electors in that address range if you do!

If you have a new address you create a NEW address range for that one address until election is closed.
Ballot Processing–
Overview

• The Ballot Processing screen will allow you to process Absentee and Vote-By-Mail ballots.

• Click Ballot Processing to begin.
Ballot Processing–

Overview

- Ensure the correct Batch and Received Dates are showing.

- Enter in a Batch Description and Identifier.
Ballot Processing—
Creating a Ballot Batch

- Change the Ballot Label source to the source of the received ballots.

- Click in the ID Field.

- Scan Barcodes or Manually enter each Ballot ID and click Add.
Ballot Processing—Process Ballots

• Once all ballots have been entered select an entry to:
  • View Ballot Details
  • Delete
  • View Voter Details
  • View Household Info
  • View Active Ballots

• Click **Close** when you have finished examining each entry.
Ballot Processing– Verify Ballots

- The new batch will be displayed.
- Click process to add additional ballots to the batch.
- When ready highlight the desired batch and Click Verify to continue.
Ballot Processing–
Verify Ballots

- Verify the displayed signature and enter a Ballot Status.

- Click Save and Move to Next Record to be Processed to continue.

- Repeat this process until you have verified all signatures.
Ballot Processing–

Overview

• The completed batch will now be listed with no unprocessed ballots.

• Repeat the previous steps to process additional ballot batches.
Undeliverable Ballots

• Montana mail ballot law requires notifying the elector whose ballot was returned as undeliverable by sending an NVRA notice which can be forwarded, with prepaid postage. See 13-19-313 (4), MCA.
Ballot Processing—Undeliverable Ballots

- Click New to create a new batch of undeliverable ballots.
Ballot Processing—Undeliverable Ballots

- Click in the **ID** field and either **scan a ballots barcode** or manually enter the **ballot ID** and click **Add**.
Ballot Processing—
Undeliverable Ballots

- The Voter Details will display.
- Review displayed information.
- Click Save to store the undeliverable ballot record.
Ballot Processing–
Undeliverable Ballots

• The new undeliverable ballot batch will be displayed.

• Follow the previous steps to add in additional undeliverable ballots.

• Close Ballot Processing when finished.
Releasing Undeliverable Ballots

• Sometimes a ballot comes back undeliverable and the voter subsequently shows up in the office.

• The ballot must be released from the undeliverable batch, and provided to the voter.
Click Ballot Processing
You will receive this message: Ballot has been received already
Click OK and you will be taken to the Receiving Ballot Batches screen.
Click on View Held Ballots
Highlight the batch and click Process
Delete the voter from the Undeliverable Ballots so the ballot can be processed
Verify and save. Then the ballot will be listed as Accepted
Official Register—Generate Official Register

- The Official Register is only available for Poll elections.

- Click Pull Voters to begin.
Official Register—
Generate Official Register

• The **Generate Official Register** screen will appear.

• Choose which sort order options you would like and click **OK**.
Official Register—
Generate Official Register

• A confirmation message will display.

• The register can be regenerated or you can pull a supplemental register by clicking the buttons at the bottom of the screen.

• Once the register has been printed check Process Completed.
Election Expenses–Overview

- The Election Expense screen can be used to track expenses for your election.

- This screen is not required to close your election.

- Click Process Completed when you are finished with this screen.
Election Results– Overview

• Election results can be manually entered into this screen.
• Using this screen will store this information in MT Votes for future reference.
• This screen is not required to close your election.
• Click process complete once results have been entered.
Process Official Register—

Overview

• Accepted ballots can be indicated manually by checking the box next to each voter’s name.

• To use the barcode scanner click in the barcode field and scan the corresponding barcode for a voter on that page.
Process Official Register—Overview

• You can only scan barcodes for the page you are on.

• Click next to go to the next page and begin scanning barcodes again.
Process Official Register—Overview

• Once you have finished processing the official register you can print a list of processed voters.

• Clicking Add Omitted Voters will allow you to add in voters missing from the official register.
Process Official Register—Overview

- Carefully verify that all voters have been processed correctly before finishing this process – marking the wrong voter is common and causes big problems.

- Check Process Completed.

- Refresh Wizard Status
Purpose of the Duplicate Ballot Report

- Determine whether any voters appear to have intentionally voted more than once.

- After you review the voter record and ballot information for each voter, mark any voter who appears to have voted more than one ballot.

- Generate a report to send to the County Attorney for further investigation.
Duplicate Ballot Report—Overview

• This screen will list any voters that have received an additional ballot for any reason.

• This includes re-issued or replacement ballots.

• Once you have reviewed this screen check Process Completed.
Requirements to Close an Election

An election can only be closed once the following has been done:

• All ballot labels have been printed

• Mail and Absentee Ballots have been processed

• Provisional Ballots have been processed

• The Official Register has been processed
Close Election–Overview

• This screen will allow you to close an open election or re-open a closed election.

• Click the Post History for Processed Voters and Close Election to continue.
Close Election—Overview

• A reminder message will come up prompting you to review the Duplicate Ballot Report if you have not done so.

• You will be asked to confirm that you would like to close the election.

• Click Yes.
Close Election—Overview

• The election is now closed and any late registrants will automatically change to “Active” status.

• To re-open the election click Reopen Election.

• Be sure to re-close the election as soon as you have made any changes.
Election Management–Available reports

BP-011: Ballot Batches Receiving

BP-012: Voter Listing By Ballot Style

BP-013: Undeliverable Ballots

BP-020: Duplicate Ballots Report

BP-034: Returned Ballots in Date Range

EX-BP1: Voter Master Listing by Election
As always, please feel free to contact the Help Desk at 1-866-541-6767.