Late Registration and Provisional Ballot Processing

This training will walk the user through:

• Late Registration
• Provisional Ballot Search And Detail Screens
• Provisional Ballot Reports And Exports
• Processing Provisional Ballots Issued At Polls
• Processing Provisional Ballots Issued During Late Registration. (Precinct-To-Precinct & County-To-County)
• Search on Previous County
• Finding Previous Precinct
• Printing Provisional Ballot Labels
• Resolving Provisional Ballots
• Provisional Ballot Module Privileges
Entering a Late Registrant
When Late Registering a voter, the following entries must be made:

A. Voter Registration Status of **Late Registration**.
B. One of the three Late Registration Status reasons must be selected – “new”, “county to county” or “precinct to precinct”.
C. Set the Vote Eligible Date to the **Sunday prior to the close of regular registration**.
If a late registrant is registering for the first time, the Vote Eligible (a) date will default to the current system date.

Please see the next slide if the voter is **NOT** a new late registrant.

This **must** be changed to the Sunday before the close of regular registration, or the voter will not be pulled into the election and you will not be able to issue a ballot.

![Registration form screenshot](image)
If an existing voter has moved and is late registering, you will notice that their record shows their original vote eligible date.

If the voter already has a Vote Eligible Date that is earlier than the Sunday before the end of regular registration, you do not need to change the date.
Once the ‘Voter Status’, ‘Status reason’, and ‘Vote Eligible’ date have been entered you will need to enter a new request on the Absentee Tab (a). If it is Election Day, ‘county to county’ and ‘precinct to precinct’ will not be issued a ballot through the Absentee tab. You will need to issue a ballot through the provisional module (starting on Slide 55).
Entering Absentee Status

A. Click the Absentee Tab.

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

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

For Late Registrants you will want to use the Election Specific Absentee Type.
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 an absentee ballot.
Entering Absentee Details

- For Election Specific requests ensure the correct election is showing (a).
- Verify the Absentee Application Source (b), Issue Method (c), and Date Requested (d) are accurate.
- Verify the user’s address (e).
Issuing Absentee Ballot

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

- Save and Issue Ballot (In-Person) *This is the option that would be used for late registrants.

- 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.
Late Registrants through the Provisional Module

• If it is **Election Day**, and the registrant is a **transfer** registrant. They **must** be issued a provisional ballot.

• This is required as you cannot accept their ballot without verifying they have not voted in a different county or precinct.
Click on the **Provisional Ballots** link under the Elections header to begin.
There are two main screens within the Provisional Module:

- Provisional Ballot Search
- Provisional Ballot Detail
Provisional Ballot Search screen.
The **Name Search** in this screen has the same functionality as in Voter Search.
The **Election** drop down will display active, past, present, and future elections.
There are two options in the **Ballot Disposition** field: **Accepted** or **Rejected**
The list of available **Ballot Disposition Reasons** is on the next slide. The ballot disposition reasons are the same as on the Provisional Ballot Envelope.
<table>
<thead>
<tr>
<th>Accepted Reasons:</th>
<th>Rejected Reasons:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name omitted from register</td>
<td>Not registered in state</td>
</tr>
<tr>
<td>Identification was resolved</td>
<td>Registered but wrong county</td>
</tr>
<tr>
<td>MVD or government agency error</td>
<td>Registered but wrong precinct</td>
</tr>
<tr>
<td>Absentee ballot not received</td>
<td>Insufficient ID</td>
</tr>
<tr>
<td>Challenge resolved</td>
<td>Provisional ballot envelope not complete</td>
</tr>
<tr>
<td>Elector did not vote in previous jurisdiction</td>
<td>No signature</td>
</tr>
<tr>
<td>Other</td>
<td>Non-matching signature</td>
</tr>
<tr>
<td></td>
<td>Ballot already voted</td>
</tr>
<tr>
<td></td>
<td>Fraud</td>
</tr>
<tr>
<td></td>
<td>MVD or other government agency has no record of registration</td>
</tr>
<tr>
<td></td>
<td>Challenge unresolved</td>
</tr>
<tr>
<td></td>
<td>Ballot missing from envelope</td>
</tr>
<tr>
<td></td>
<td>Elector failed to Sign Register</td>
</tr>
<tr>
<td></td>
<td>Provisional registration not resolved</td>
</tr>
<tr>
<td></td>
<td>Other</td>
</tr>
</tbody>
</table>
The **Previous County** field allows you to specify the county from which the voter moved.
The **Voting County Search Scope** allows you to specify the County that issued the provisional ballot.
The list of available Provisional Ballot Reasons is on the next slide. The provisional ballot reasons are the same as on the Provisional Ballot Envelope.
<table>
<thead>
<tr>
<th>Provisional Ballot Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballot not received or lost</td>
</tr>
<tr>
<td>Claims registration with MVD or other government agency, which could not be confirmed</td>
</tr>
<tr>
<td>County-County late registration in election office</td>
</tr>
<tr>
<td>Failed to sign register</td>
</tr>
<tr>
<td>Identification was insufficient</td>
</tr>
<tr>
<td>Name not in official register and not erroneously omitted</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>Precinct-to-Precinct late registration in election office</td>
</tr>
<tr>
<td>Register indicates provisionally registered, which was not resolved</td>
</tr>
<tr>
<td>Right to vote was challenged on the following grounds</td>
</tr>
<tr>
<td>Challenge unresolved</td>
</tr>
<tr>
<td>Ballot missing from envelope</td>
</tr>
<tr>
<td>Elector failed to Sign Register</td>
</tr>
<tr>
<td>Provisional registration not resolved</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>
The **Residence County Search Scope** allows you to specify the current county of residence.

- In the majority of scenarios this will be the same as the voting county.
- If a voter has a duplicate record the search will display the link to the voter’s record.
Additional search criteria includes the ability to specify **Approved** or **Not Approved**, and the option to **Include Confidential** voters.
The resulting records that match your search criteria will display in the Search Results field.

Click any column to sort the results by that data-type.
Clicking the **New** button will allow you to create a new provisional ballot entry.
Selecting a record and clicking the **Details** button will take you to the **Provisional Ballot Details** screen for that provisional ballot.
Selecting a record and clicking the **Delete** button will permanently remove the selected provisional ballot.
Provisional Ballot Reports and Exports
Clicking the **Statistical Export** button will generate and send a **Provisional Voter Statistics** report to the Scheduled Jobs Module.

This report is primarily used by the Secretary of State’s office and counties will rarely use this option.
Above is an example of the export. When ran at the county level it will only list your own county's statistics.
Clicking the Report button will generate the Provisional Ballots Canvass Report.
This report will display all selected parameters from the search screen.

<table>
<thead>
<tr>
<th>Precinct</th>
<th>Voter Name</th>
<th>DOB</th>
<th>Prov. Ballot Reason</th>
<th>Ballot Disposition</th>
<th>Ballot Disp. Reason</th>
<th>Previous County</th>
<th>Previous Precinct</th>
<th>Seq Num</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>John Smith</td>
<td>12/30/1975</td>
<td>Name not in official register and not erroneously omitted</td>
<td>Accepted</td>
<td>Name omitted from register in error</td>
<td>Blaine</td>
<td>Precinct 1</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>Smith</td>
<td>12/30/1975</td>
<td>Name not in official register and not erroneously omitted</td>
<td>Accepted</td>
<td>Name omitted from register in error</td>
<td>Yellowstone</td>
<td>Precinct 3</td>
<td>6</td>
</tr>
</tbody>
</table>
Clicking the **Export** button will generate the previous report as an excel spreadsheet and send it to the **Scheduled Jobs** module for exporting.
Above is an example of the export, which will contain the same information as the **Provisional Ballot Canvas Report**.
Provisional Ballot Detail screen.
The Provisional Ballot Detail screen will allow you to Link an entry to a voter, enter previous county information, and process Provisional Ballots.
From this screen you can enter a new provisional ballot or update an existing entry.

You also have the option to issue ballots, reprint issued ballots, and view the voter record.
Link to Voter on Provisional Ballot Detail screen.
Enter the Voter’s name. Clicking the **Link To Voter** button will cause the system to attempt to find a matching registered voter record.
If multiple potential matches are found the search results will display to allow you to select the appropriate voter.
If an exact match is found the voter’s information will automatically populate.
If there is no matching registered voter you can manually enter in their information, but you will not be able to issue a ballot until you have registered the voter and updated this screen to link to their new Voter ID.
Processing a Provisional Ballot issued at the Polls
Provisional Ballots issued at polls will be entered into Montana Votes after the Polls have closed.

- Most counties will enter them the following day.
- All provisional ballots must be entered in MT Votes by the Friday following Election Day.
Click the **New** button to begin.

The **Provisional Ballot Detail** screen will display.
After searching and Linking to a registered voter (outlined in slides 30-34) specify the Election (a) for which you are generating the provisional ballot.

Enter a Provisional Ballot Reason. (b)
Enter a **Ballot Disposition** (a) and **Ballot Disposition reason** (b)

Choose a **Method of Voter Notification.** (c)
Click **Save And New** to store the record and move onto entering the next provisional ballot.

Or, Click the **Save** button and then **Close** if you only had one.
Processing Provisional Ballots Issued During Late Registration

This section will outline the following Provisional Ballot scenarios:

- Precinct-To-Precinct move on Election day
- County-To-County move on Election day.
Election Day Transfers
County to County & Precinct to Precinct
To begin you will need to first go into Voter Registration.

Bring up the Voter that you are working on.
Take note of the previous county and precinct so you don’t have to come back to find it later.

You will need this in the steps to come. If you don’t keep track of it now you will have to come back to the voter’s audit log to find it again.
Update the Voter’s information.
Once the voter’s information has been updated click on the **Elections Menu**, and then click on the **Provisional Ballot** option.

This will bring up the **Provisional Ballot Search** screen.
Click the **New** button to begin.

The **Provisional Ballot Detail** screen will display.
Enter the voter’s name and attempt to link the entry to a voter. Refer to slides 44-47 for further Link To Voter Information.
Once the voter’s information has been entered, and linked to a voter ID, you will need to enter previous precinct information.
If you did not keep track of the voter’s previous county and precinct information you will have to return to their Audit Log within Voter Registration to locate the previous information.
Once all previous county information has been entered, you will need to specify which **Election** and **Ballot Style** you are generating the provisional ballot for.

Ballot Styles must be generated in Election Management prior to this step or you will not have any styles to choose from.
Once all previous information has been entered you will then need to enter a **Provisional Ballot Reason** and then click the button to **Issue Ballot**.

Refer to Slides 69 – 73 for steps for printing ballots.
County to County moves: Search on previous County
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.
You will then need to send an email to the counties who took a voter to let them know if it is okay to count their provisional ballot or not (based on whether or not the individual voted a ballot in your county).

You **must** respond to county requests before 3 p.m. on the Monday following Election Day.
Printing A Ballot Label From The Provisional Ballot Detail Screen
When choosing to issue a ballot within the provisional ballot detail screen the above window will display.

Verify you have the correct **Election** and **Ballot Style** showing, and then choose your preferred **Label Type**.

Click **Print Label**
A report will generate for your label and you may print it using whichever printer and paper is appropriate.
In the **Select Printer** box scroll back and forth to locate your preferred printer.

Choose the number of copies you would like and when ready click **Print**.
If for any reason you need to print the label again you may do so by clicking the **Reprint** button on the voter’s **Provisional Ballot Detail** screen.
Resolving Provisional Ballots
On the **Provisional Ballot Search** screen you will need to select the election you are working on and click **Search** to bring up a list of your provisional ballots. You can enter additional information to narrow your search.

When ready, Click on the voter you are working on and click the **Details** button.
To update an individual’s provisional ballot record, first enter a **Ballot Disposition** and **Ballot Disposition reason**.

Choose a **Method of Voter Notification**.
Click the **Save** button and then **Close**.
Provisional Ballot Privileges in User Administration
In order to have access to the Provisional Module you will have to select the box for Provisional Ballots in User Roles and Privileges for yourself and any other workers requiring access.
As always, please feel free to contact the Help Desk, at 1-866-541-6767, with any further questions you have.