



# MT Votes January 2016 Release

**2016 Election Administrator Certification Training**

Montana Secretary of State

Elections and Government Services

[sosmt.gov](http://sosmt.gov) [soselections@mt.gov](mailto:soselections@mt.gov)

# Voter Registration

# Resync Functionality

## What is Resync:

- Information is “**in sync**” when it **agrees**.
- If you update a voter’s information after they were issued a ballot for an election, the information on the voter’s record **dis**agrees with the information that was used to create the voter’s ballot. The new information is **not in sync** with the ballot information for the election.
- A “**resync**” applies the voter’s new information to the election, by creating a new ballot for that voter.

# Resync Functionality

## What is Resync:

### Voter Information

Voter Registration

Voter record successfully saved, Voter number is 450146854

New Save Clear Search Process Batch

Voter ID State ID SSN Birth Date Age Gender Last Name First Name MI Suffix

1234 01/31/1981 34 TIMBERLAKE JUSTIN R

Residence Absentee Contacts History Voting History

Standard NCOA CASS Migration Election Comments Worker Clear

House # Suffix Pre Dir Street Name Type

22 5 HOBACK ST

Post Dir Unit Type

City/St/Zip HELENA MT 59601

County LEWIS & CLARK Precinct PCT 08 Split P08.1

Mailing

Country UNITED STATES OF AMERICA USA Clear

Address

City/St/Zip

Active/Sent

Registration Misc Info Custom Duplicate Req. 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

Comments

Voter Polling Locations

Precinct P08 - PCT 08 View Image

Split P08.1

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 BALLROC
TEST PRIMARY POLL ...	01/18/2016	01/29/2016	CIVIC CENTER BALLROC
Fed Prim Test - Poll LC	05/22/2016	06/07/2016	CIVIC CENTER BALLROC

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 083	House District 83
COUNTYWIDE	25	Lewis & Clark
SCHOOL DISTRICT	01 EL	SCHOOL DISTRICT 1 ELEMENTARY
COMMUNITY COUN...	NCD2	Neighborhood Council District #2

### Ballot Information



453832246  
PCT 08

JUSTIN R TIMBERLAKE  
22 S HOBACK ST  
HELENA , MT 59601

P08  
1409

# Resync Functionality

## What is Resync:

**Voter Registration**

Voter Print Elections Petitions Imaging Address [Help](#)

New Save Clear Search Process Batch

Voter ID State ID SSN Birth Date Age Gender Last Name First Name MI Suffix

1234 01/31/1981 34 TIMBERLAKE JUSTIN R

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

Standard NCOA CASS Migration Election  
Comments 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/Sent**

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

Comments

**Voter Polling Locations**

Precinct 453832246  
PCT 08

Split

Polling Place JUSTIN R TIMBERLAKE  
22 S HOBACK ST  
HELENA, MT 59601 P08  
1409

**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 083	House District 83
COUNTYWIDE	25	Lewis & Clark
SCHOOL DISTRICT	01 EL	SCHOOL DISTRICT 1 ELEMENTARY
COMMUNITY COUN...	NCD2	Neighborhood Council District #2
CITYWIDE	01	CITY OF HELENA

# Resync Functionality

## **Resync Issue:**

- Previously, a lot of resyncs happened behind the scenes in MT Votes.
- Sometimes these resyncs resulted in a voided ballot, even though the user did not intend to void a ballot.

# Resync Functionality

## **Resync Solution:**

Recent enhancements to MT Votes give you more control over the resync. On your end, you will see a resync pop-up box, asking if you would like to resync the voter's information for one or more elections.

# Resync Functionality

## What's the pop-up look like?:

**Election Update**

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

Voter information has been changed. Would you like to resync this voter's information for the following election(s)? If you answer YES it will void their current active ballot and reissue a new ballot for the selected election(s).

[Select All](#) [Unselect All](#)

	Election Date	Election
<input type="checkbox"/>	01/22/2016	TEST SCHOOL VBM ELECTION

Once updated, information can not be rolled back

**Yes** **No**

## **When will the resync box pop?:**

Whenever you update a voter's key information (name, residence, mailing address, absentee address), AND the voter has a ballot in one of the following stages:

- Sent
- Undeliverable
- Resent
- Void

## **When does the resync not pop?:**

The voter does not have a ballot for any election, or the voter's ballot is in one of the following stages:

- Prepared\*
- Accepted
- Rejected

\*If a voter has a prepared ballot and you update that voter's key information, the prepared ballot will automatically be updated with that information.

## Other thoughts on Resync...

I think of the resync pop-up appearing anytime you have already *issued* the voter a ballot for an ongoing election, and you change information on that voter's record that you may or may not want to apply for the ongoing election.

## **How do I know if I want to Resync?**

- If you need to void the voter's ballot and reissue a new one, the answer to the Resync is

YES

- If you do not want to void the voter's ballot and reissue a new one, the answer to the Resync is

NO

# Questions to Consider before Answering Yes or No to Resync

- What type of application did I receive?
  - Voter Registration Card
  - Absentee Request
  - Undeliverable Confirmation Notice
- Who did I receive the application from?
  - Regular Registrant
  - Late Registrant
  - UOCAVA registrant
- When did I receive the application?
  - Before or after the close of registration
  - Before or after the deadline to issue absentees
- How did I receive the application?
  - In person
  - By mail
  - Other
- What type of information is changing?
  - Residence address change (must be made in person after the close)
  - Mailing/absentee address change

# Resync Functionality

## Scenario 1:

- It is before the close of registration for a Fire District Election. Your judges are stuffing ballots for the election, which means you have printed labels in MT Votes and ballots are in Active/Sent stage. (Just in MT Votes, you have not actually sent ballots to voters yet.)
- You receive a registration card from one of the voter's in the Fire District. The registration card indicates a new residence address.
- Do you answer Yes or No to the resync?

# Resync Functionality

## Scenario 1 Solution:

- YES
- You would answer Yes to the resync because you received the registration card before the close of regular registration.
- Note: the judges are already stuffing a ballot for this voter under the voter's old information. That ballot will have to be pulled out and voided.

# Resync Functionality

## **Scenario 2 :**

- It is past the close of regular registration for the School Mail Ballot Election you are conducting.
- You receive a card in the mail with a residence address change for a voter who was already sent a school ballot at their old residence.
- Do you answer Yes or No to the resync?

# Resync Functionality

## Scenario 2 Solution:

- NO
- Because it is past the close of regular registration for the school election, and this voter did not appear in person to late register for the school election, the address update may only be applied to future elections.
- Note: You may want to attempt to contact the voter to give them options for voting in the school election.

# Resync Functionality

## Scenario 3 :

- We are in the period of late registration for a School Mail Ballot Election that our office is conducting. A temp gets the resync pop-up and asks what to do.
- You find out that the voter came in with a voted ballot for the school election, sealed in the signed affirmation envelope. The voter was working with your temp to update their residence address to make sure it is correct for the Primary.
- Do you answer Yes or No to the Resync?

# Resync Functionality

## Scenario 3 Solution :

- It depends.
- In this case, I would give the voter the option to return the voted ballot they brought in, or get a new school ballot under their new address.
- Voter requests new ballot under new address:
  - Yes to resync
  - Note: You would take the ballot they brought in and mark it void. The voter's status would be late registration for the school election.
- Voter wants to use the ballot they already voted:
  - No to resync
  - Note: Since the voter was not updating their address and getting a ballot for the school election, they are not a late registrant. They are updating their registration as a regular registrant for the next election.

# Resync Functionality

## **Scenario 4:**

- A ballot for a vote by mail election comes back undeliverable. The voter returns the undeliverable confirmation notice, indicating a new residence address.
- Do you answer YES or NO to the Resync?

## **Scenario 4 Solution:**

- NO
- In this case, you would reSEND the ballot to the voter through the issue ballots screen.

# Voter Registration

## **Situation:**

With the passing of HB84 the Secretary of State is required to prescribe a form that can verify an elector's late registration status for a school election.

In discussion with METAC we designed the Certificate of Late Registration, which is available in MT Votes. This was actually implemented in the September METAC release, and updated in this release.

# Voter Registration

## Changes:

The biggest changes to this form were to include:

- Type of Late Registration
- Previous County/Precinct
- Previous School District information
- New School District information

You can only print this certificate if the voter is in Late Registration status. It is available from the voter record in the Print menu.

CERTIFICATE OF LATE REGISTRATION

Type of Late Registration: Precinct to Precinct	Current Precinct: PCT 17
Previous Precinct: PCT 08	
<b>District Name</b> SCHOOL DISTRICT 1 ELEMENTARY SCHOOL DISTRICT 1 HIGH SCHOOL	<b>District Name</b> SCHOOL DISTRICT 1 ELEMENTARY SCHOOL DISTRICT 1 HIGH SCHOOL
<b>Lewis &amp; Clark County Montana</b> <b>Election Administrator</b>	<b>316 N PARK ROOM 168</b> <b>HELENA, MT 59623</b>
The undersigned election administrator in and for the county and state aforesaid, does hereby certify that	
<b>TEST CERTIFICATE REG</b>	
Residence Address 825 8TH AVE HELENA, MT 59601	Mailing Address
Is a duly qualified elector of this county, Registration Number 450146833:	
County Registration Date: 01/11/2016	
State Registration Date: 01/11/2016	
Date of Birth: 01/01/1994	
_____ Voter Signature	
In witness hereof, I have hereunto set my hand and affixed my official seal on this 11 day of January 2016.	
<b>SEAL</b>	_____ Paulette DeHart Election Administrator
	By _____ Deputy

# Voter Registration

**Changes:**  
You can find the certificate of Late Registration under the print menu in Voter Registration.

The Voter **MUST** be in Late Registration status.

The screenshot shows the 'Voter Registration' application window. The voter's name is CASEY, SJOJLUND, born 01/22/1980, age 36, living at HELENA, MT 59601. The registration status is 'Late Registration - LR' as of 10/02/2008. The voter is currently in 'Active/Sent' status. The interface includes sections for 'Voter Polling Locations' (Precinct P06 - PCT 06, Split P06.4, Polling Place EXHIBIT BLDG-ENTRY HALL-FAIRGROUNDS) and 'Election' history. A table of districts is also visible.

Election	Late Reg Date	Date	Polling Places
TEST SCHOOL VBM E...	01/03/2016	01/22/2016	EXHIBIT BLDG-ENTRY H...
TEST PRIMARY POLL ...	01/18/2016	01/29/2016	EXHIBIT BLDG-ENTRY H...
FD Prim Test - Poll LC	05/22/2016	06/07/2016	EXHIBIT BLDG-ENTRY H...

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

# Ballot Audit Log

## **Reported Issue:**

The Ballot Audit Log lacks adequate information about a ballot, and the current search features are not necessary. One big issue is that this log only appears to track certain instances of what happens to a ballot.

# Ballot Audit Log

## Solution:

The ballot audit log received a complete makeover. It will now track every change that a ballot goes through. You can also now search by Election OR Ballot ID.

The screenshot shows a software window titled "Ballot Audit Log". At the top, a green message states "Query executed successfully." with a "Help" link. Below this is a search section with a pink background, containing a dropdown menu for "Election" and a text input for "Ballot ID", with "Search" and "Clear" buttons. The main area is a table with the following data:

Ballot ID	Ballot Seq. #	Created	Value Before	Value After	User	County	Electi...	Elec
453766503	2	01/11/20...	Rejected	Accepted	ct1024-gol	Golde...	02/2...	Test
453766503	2	01/11/20...		Rejected	ct1024-gol	Golde...	02/2...	Test
453766503	2	01/11/20...	Sent	Processed	ct1024-gol	Golde...	02/2...	Test
453766503	2	01/11/20...		Reissued/Sent	ct1024-gol	Golde...	02/2...	Test
453766501	1	01/11/20...	Sent	Processed	ct1024-gol	Golde...	02/2...	Test
453766501	1	01/11/20...		Void	ct1024-gol	Golde...	02/2...	Test
453766501	1	01/11/20...	Prepared	Sent	ct1024-gol	Golde...	02/2...	Test
453766501	1	01/11/20...		Prepared	ct1024-gol	Golde...	02/2...	Test
452702559	1	09/24/20...		Accepted	c98834	Golde...	11/0...	53 F

At the bottom right of the window is a "Close" button.

# Ballot Audit Log

## Solution:

You can access the ballot through the voter record under the Voter Menu item.

The screenshot shows a software window titled "Voter Registration" with a menu open over the "Audit Log" section. The menu items are: "Ballot Audit Log" (highlighted), "Voter Moves", "Linked Non Duplicate Voter", "Add Non Duplicate Voter", "Precinct and Districts" (with keyboard shortcut Ctrl+D), "Elected Officials" (with keyboard shortcut Ctrl+E), and "Previous Voter" (with keyboard shortcut Ctrl+P). The main interface displays voter information for a person with birth date 10/22/1980, age 36, gender [redacted], last name SJOLUND, first name CASEY, and MI L. The "Voter Polling Locations" section shows Precinct P06 - PCT 06, Split P06.4, and Polling Place EXHIBIT BLDG-ENTRY HALL-FAIRGROUNDS. The "Election" table lists several events with their dates and polling places. The "Districts" table lists various district types and codes. At the bottom, there is a signature line with a handwritten signature and a "Comments" field.

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

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...	NSC4	Neighborhood Council District #4

# Absentee Tab

## **Situation:**

In September of 2015, EBR (electronic ballot request) Absentee Status was added to MT Votes for electronic ballots for voters with disabilities. At the time, Absentee Status was only required for EBR voters.

# Absentee Tab

## Solution:

To standardize the absentee process, users are now required to select an Absentee Status to add anything other than an Election Specific request.

Absentee Types are now directly related to the Absentee Status that is chosen.

The screenshot shows the 'Voter Registration' application window. The 'Absentee' tab is active, displaying a form for voter registration. A blue arrow points to the 'Absentee Status' dropdown menu, which is currently set to 'UOCAVA'. The form includes fields for personal information, residence, and election details. A table of 'Voter Polling Locations' and a list of 'Districts' are also visible.

**Voter Registration**  
Voter ID: [ ] State ID: [ ] SSN: [ ] Birth Date: 01/22/1980 Age: 35 Gender: [ ] Last Name: VOTER First Name: TEST MI: [ ] Suffix: [ ]

**Absentee Status** [UOCAVA] [Details] [Remove]

**Registration** Party: No Party Last Verified Date: 01/11/2016 Status: Active - A [MVD Verified] Reason: [ ] [SSA Verified] Source of Registration: DMV - 01 [Verify] Old Voter ID: [ ] County Reg Date: 01/11/2016 Vote Eligible: 01/11/2016 Last Voted Date: [ ] [No Signature] [Confidential] [Reveal] [US Citizen]

**Voter Polling Locations**  
Precinct: LAVINA - LAVINA [View Image]  
Split: 02  
Polling Place: LAVINA SENIOR CENTER

**Election**

Election	Late Reg Date	Date	Polling Places
Test Election	01/31/2015	02/29/2016	LAVINA SENIOR CENTER

**Districts**

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 14	Judicial District 14
SENATE DISTRICT	SD 15	Senate District 15
HOUSE DISTRICT	HD 030	House District 30
COUNTYWIDE	19	Golden Valley
JURY	Lavina-MC	Lavina City Court
SCHOOL DISTRICT	2	SCHOOL DISTRICT 2

# Absentee Tab

**Voter Registration**  
Voter record successfully retrieved.

New Save Clear Search Process Batch Help

Voter ID: 00000011 State ID: SSN: Birth Date: 01/22/1980 Age: 36 Gender: VOTER Last Name: TEST First Name: MI: Suffix:

**Absentee Detail**

Absentee Type: Seasonal From: To:

Absentee List: Seasonal Issue Method: Issue Details:

Date Requested: 01/22/2016 Political Party:

Use Address On File

3000 MAIN ST  
HELENA, MT 59602

Print Application

Absentee Address

Country: UNITED STATES OF AMERICA  USA  EMAIL  FAX

Address:

City/St/Zip:

Save and Issue Ballot Update and Save Close

**Registration** Misc Info Custom Du Last Ver

Party: No Party Last Ver:

Status: Active - A

Reason:

Source of Registration: DMV - 01

Old Voter ID: County Reg Date:

Vote Eligible: 01/01/2016 Last Voted Date:

No Signature  Confidential   US Citizen

Comments:

Examples of adding a Absentee List, Absentee Status and a UOCAVA Absentee Status.

**Voter Registration**  
Voter record successfully retrieved.

New Save Clear Search Process Batch Help

Voter ID: 450146835 State ID: 00000011 SSN: Birth Date: Age: Gender: Last Name: First Name: MI: Suffix:

**Absentee Detail**

Absentee Type: Military Overseas From: 1/22/2016 To: 1/31/2016

Civilian Overseas Military Overseas Military Domestic Issue Method: Issue Details:

Date Requested: 01/22/2016 Political Party:

Use Address On File

3000 MAIN ST  
HELENA, MT 59602

Print Application

Absentee Address

Country: UNITED STATES OF AMERICA  USA  EMAIL  FAX

Address:

City/St/Zip:

Save and Issue Ballot Update and Save Close

**Registration** Misc Info Custom Last Ver

Party: No Party Last Ver:

Status: Active

Reason:

Source of Registration: DMV - 01

Old Voter ID: County Reg Date: 01/12/2016

Vote Eligible: 01/01/2016 Last Voted Date:

No Signature  Confidential   US Citizen

Comments:

# Absentee Tab

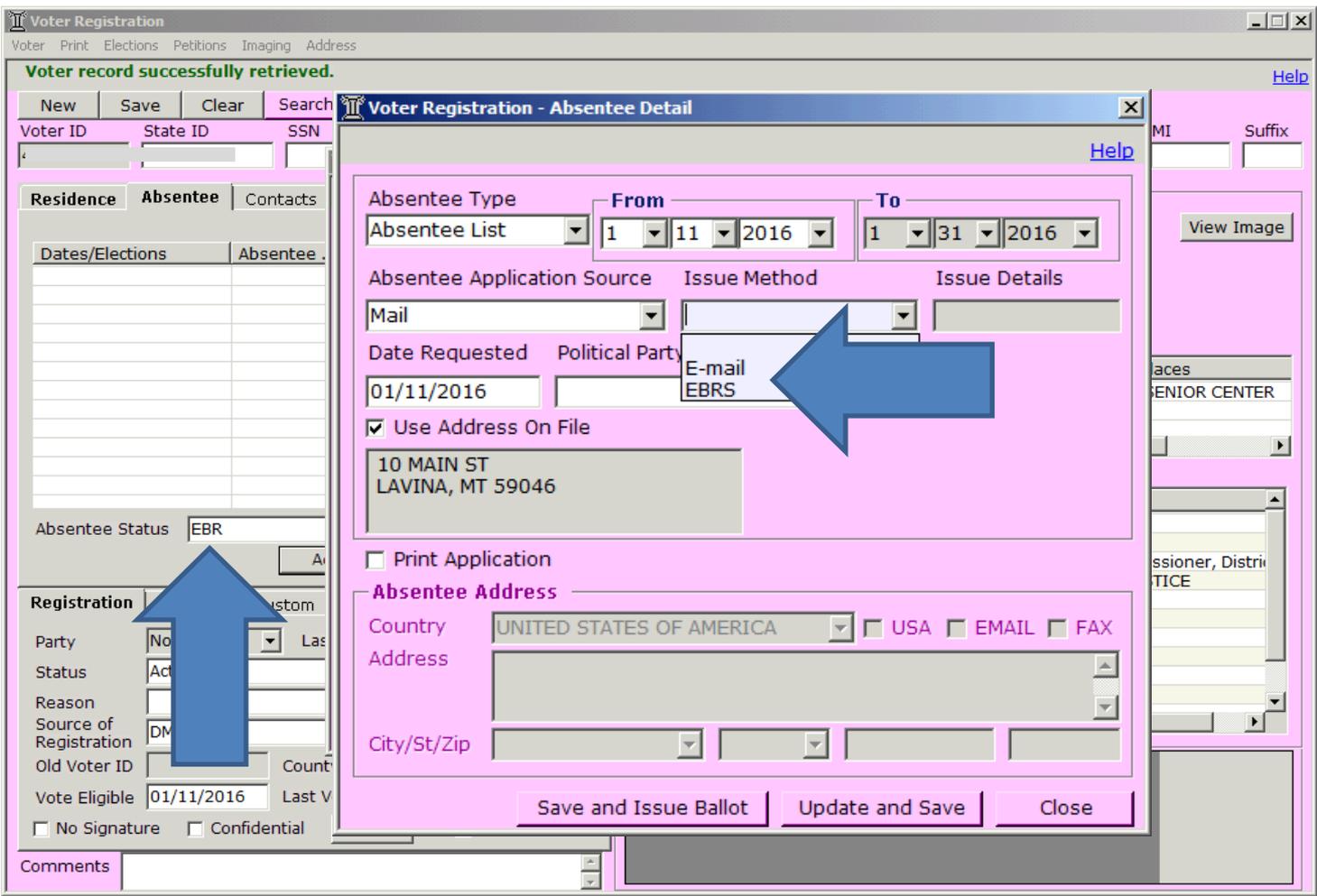
## **Reported Issue:**

The EBR Absentee Status allowed a user to select any type of issue method.

# Absentee Tab

## Solution:

The user can now only select between email and EBRS as the issue method for EBR Absentee Status.



# Election Management

# Election Management

## **Reported Issue:**

Since EBR is an Absentee Status, they can have an absentee type of 'Absentee List'. This means EBR voters would be pulled into the election with all of your Absentee List individuals, and their labels would be mixed in when you print labels, making it difficult to identify the EBR absentees.

# Election Management

## Solution:

You can now sort your label batch by Issue Method, which will allow you to quickly sort out your EBRs/Email ballots.

The screenshot shows the 'Election Management' application window. At the top, it displays 'Election Date: Feb-29-2016', 'Election Type: Federal General', and 'Description: Test Election'. Below this, there are fields for 'Batch #', 'Description', and 'Mailing Date'. The main area is divided into several sections: 'Selection Criteria', 'Output Order', and 'Output Type'. The 'Selection Criteria' section has tabs for 'Languages', 'Special Assis Type', 'Ballot Types', 'Issue Method', 'Absentee Types', and 'Ballot Styles'. The 'Issue Method' tab is selected, showing a list of options: In-Person, Mailing, Absentee Team, Designated Person, Fax, E-mail, EAS, and EBRs. A blue arrow points to the 'Issue Method' tab. Below the list is an 'Include' dropdown and a 'Clear' button. There is also an 'Only Provisional' checkbox and 'Search' and 'Clear All' buttons. The 'Output Order' section has three rows of 'Field' and 'Order By' dropdowns, all currently set to 'NONE'. The 'Output Type' section has radio buttons for 'Print Now' and 'Print To File', a 'Select Label' dropdown, and a 'Number of Copies' spinner set to '1' with a 'Collate' checkbox checked. At the bottom right, there are 'Print' and 'Close' buttons. A sidebar on the left contains various navigation links such as 'Election Details', 'Ballot Review', 'Print Labels', etc.

# Election Management

## **Reported Issue:**

When the SOS extracted candidate information out of MT Votes for eSERS and ES&S, we could not determine which judicial candidates should have retention language. (Judicial candidates who are incumbents running unopposed require special retention language on the ballot.)

# Election Management

## Solution:

Add a required field of Incumbent when you enter candidates into MT Votes. The check box for incumbent was always there, but was not required. Now, you must select Yes or No.

The screenshot shows the 'Election Management' application window. The main form is for a candidate in the '19 - Golden Valley' district, running for 'County Commissioner'. The candidate's name is 'VOTER TEST'. The 'Incumbent' checkbox is checked, indicating 'Yes'. Below the name fields is a table for addresses:

Address Type	Address	Last Updated
Mailing		
Resident Addr...		
Residence	10 MAIN ST, LAVINA, MT 59046	01/11/2016
Work Address		

At the bottom of the form, there are sections for 'Satisfying Eligibility Requirements' (with a checkbox for 'County residency') and 'System Requirements' (with checkboxes for 'Lives within district' and 'Filed within deadline'). A 'Validate Candidate' button is located below these sections. The bottom of the window has 'Save & Add New', 'Save', and 'Close' buttons.

# Official Register

## **Reported Issue:**

County A had printed their official registers. Two voters from that county then moved to County B and late registered. County A printed their supplemental registers which included these two voters as deletions. County A wrote **Deleted** on the signature line. The temporary workers thought that 'Deleted' was a signature and processed them as voted.

These two voters appeared to have voting history in two different counties even though they only voted in one county.

# Official Register

## Solution:

When processing the official register, you now will receive a notification if you try to process a voter who has moved out of your county.

The screenshot displays the 'Election Management' application window. The main interface is titled 'Election Date: Jan-31-2016', 'Election Type: Federal General', and 'Description: test'. A sidebar on the left contains navigation links such as '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 shows a table of voters with columns for 'Accepted', 'Voter Name', 'Residential Address', and 'Absentee Sent/Recd Date'. Two voters are listed: 'VOGEL, ROBERT' and 'VOTER, TEST'. The 'VOTER, TEST' row is highlighted in yellow. A modal dialog box titled 'Moved Out of County' is overlaid on the table, displaying the message 'This voter has been moved to another county.' with an 'OK' button. The bottom of the window features a navigation bar with buttons for 'Print Processed Voters', 'Add Omitted Voters', 'First', 'Prev', 'Next', 'Last', and 'Page 47 of 50'. A checkbox labeled 'Process Completed' is also present.

Accepted	Voter Name	Residential Address	Absentee Sent/Recd Date
<input type="checkbox"/>	VOGEL, ROBERT	102 1ST ST E LAVINA, MT 59046	01/12/2016
<input checked="" type="checkbox"/>	VOTER, TEST	10 MAIN ST LAVINA, MT 59046	

# Provisional Ballot Module

# Provisional Ballot Module

## **Reported Issue:**

All counties do not consistently enter Previous County and Previous Precinct in the Provisional Ballot Module, which made it very difficult for other counties to Approve/Not Approve provisional voters from their county.

# Provisional Ballot Module

## Solution:

As long as voters have a Late Registration status and a reason of County to County or Precinct to Precinct, that data will now autofill in the provisional module.

**Provisional Ballot Detail**

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

**Name**

Last Name: SJOLUND First Name: CASEY Middle Name: L  
Date of Birth: 01/22/1980 Voter ID: Suffix:

**Address Provided**

Standard [Clear]

House #: 10 Suffix: Pre Dir: Street Name: MAIN Type: ST  
Post Dir: Unit Type:  
City/St/Zip: LAVINA MT 59046  
County: GOLDEN VALLEY Precinct: LAVINA Split: 02

**Mailing**

Country: UNITED STATES OF AMERICA [USA] [Clear]  
Address:  
City/St/Zip:

**Process**

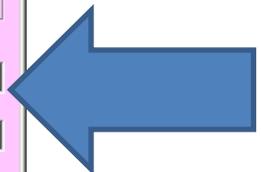
Provisional Ballot Reason:  
Ballot Disposition:  
Ballot Disposition Reason:  
Method of Voter Notification: Mail

Approved  Not Approved

**Districts**

Code	Description
CONG	CONGRESSIONAL
MT	Montana
PS 03	Public Service Commiss
SCJ	SUPREME COURT JUSTI
JD 14	Judicial District 14
SD 15	Senate District 15
HD 030	House District 30

Issue Ballot Reprint Coversheet **View Voter Record** Save And New Save Close



# Provisional Ballot Module

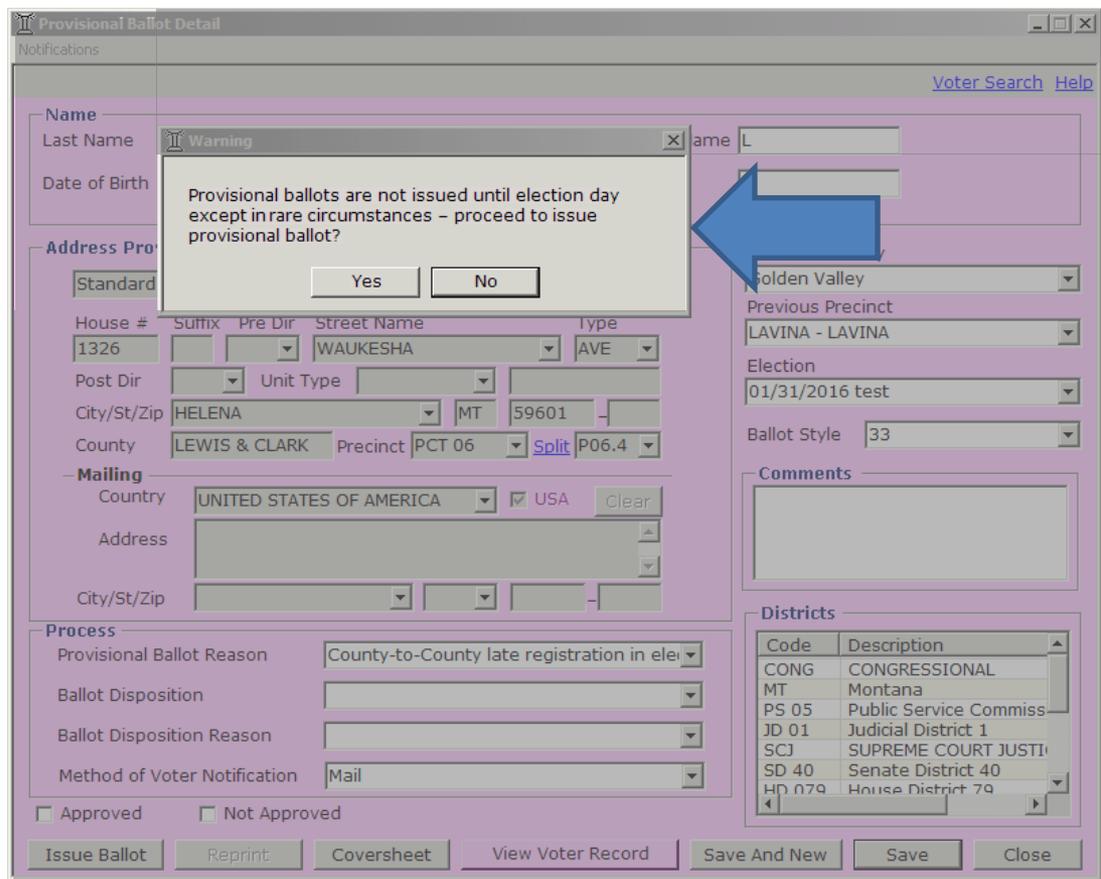
## **Reported Issue:**

Some counties were unnecessarily issuing provisional ballots for late registrants before election day.

# Provisional Ballot Module

## Solution:

If you attempt to issue a provisional ballot before election day, you will be prompted with a pop-up notifying the user that in most cases provisional ballots are only issued on election day. (You can still issue the provisional ballot if it is necessary.)



# Ballot Processing

# Undeliverable Ballots

## **Reported Issue:**

It was possible to inactivate voters from the Undeliverable Ballot Screen, even though the voter had to be sent a forwardable notice before being inactivated.

# Undeliverable Ballots

## Solution:

That checkbox has been removed to ensure that no voters are inactivated due to an undeliverable ballot without going through the NVRA confirmation process.

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

- Batch:** Contains fields for Election (02/29/2016 Test Election), Batch Description, Batch Date (01/11/2016), Received Date (01/11/2016), and Identifier.
- Ballot Label:** Includes an ID field and an "Add" button.
- Ballot Search:** Includes Name, Street, and City fields, along with a "Search" button.
- Voter Details:** Contains fields for Name on Ballot, Name in Record, Status (Active), Ballot Residential Address, Current Residential Address, Ballot Mail Address, Address Type, and Current Mail Address.

At the bottom of the form, there is a checkbox for "Review Registration" and a "Change Now" button. A navigation bar at the very bottom includes buttons for "Delete", "First", "Previous", "Next", "Last", "View Ballots", "Voter Details", "Save", and "Close".

# Reports & Labels

## **Reported Issue:**

If you reissued a ballot to a voter due to a residential address change, the EX-E01 and the E-001 Reports/Extracts in MT Votes showed the new address for both ballots.

# Reports & Labels

## Solution:

Fix these two reports to show the correct addresses for each ballot.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	VoterID	Tracking No	District/Precinct Name	BallotID	RegistrantName	DOB	Residential Address	Ballot Sent	Ballot Received	Precinct Code	Split	Ballot Style	Voter S
2		2	PCT 19	453766751	VOTER,TEST	1/22/1980	3000 MAIN ST, HELENA, MT 59602	1/12/2016		P19	P19.3	20	Active
3		1	PCT 06	453766750	VOTER,TEST	1/22/1980	1326 WAUKESHA AVE, HELENA, MT 59601	1/12/2016		P06	P06.4	33	Active
4													
5													

Ballot Style	Ballot Stage/Status	Tracking Number	Registrant Name/Designated Person	Precinct	Ballot Sent
Ballot Number	Ballot Status Reason	Voter ID	Date of Birth	Split	Ballot Received
Ballot ID	Ballot Type	Voter Status	Residential Address	Party	
Absentee Type	Ballot Issue Reason	Reason	Send To		Resent Date
			Resent Address		Comments

Precinct	PCT 06				
33	Sent/Void	1	VOTER,TEST	P06	01/12/2016
1			01/22/1980	P06.4	
453766750	Original	Active	1326 WAUKESHA AVE, HELENA, MT 59601	No Party	
Election Specific			1326 WAUKESHA AVE , HELENA MT 59601		
20	Sent	2	VOTER,TEST	P19	01/12/2016
1			01/22/1980	P19.3	
453766751	Reissued	Active	3000 MAIN ST, HELENA, MT 59602	No Party	
Election Specific			3000 MAIN ST , HELENA MT 59602		

# Reports & Labels

## **Reported Issue:**

Counties requested that the Ballot Source be added as a sort option on the BP-034 Report.

# Reports & Labels

## Solution:

The BP-034 can now be sorted by Ballot Source.

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 (Golden Valley), Election (Mill levy increase - 05/05/2015), Districts (checkboxes for various districts), Batch Number (checkboxes 3-9), Precincts (checkboxes for LAVINA and RYEGATE), Received Range (From/To fields), Ballot Stage (checkboxes for Prepared, Sent, Received/Processed, Undeliverable), Ballot Style (checkboxes for All and 1), and Ballot Status (checkboxes for Accepted, Rejected, Void). Below these is a 'Select Report' table with columns for Code, Name, and Sort Order. A blue arrow points from the 'Name' column to the 'Sort Order' column. The table lists reports BP-023 through BP-038. At the bottom, there is a 'Folder' field with 'Browse' and 'Export' buttons, and 'Cancel' and 'Run Report' buttons.

Code	Name	Sort Order
BP-023	Ballot Style Key	BALLOT SOURCE
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	

# Coming later this month

Currently, if a new or transfer voter's driver's license number does not verify in MT Votes, or if the ID# is a partial SSN you have to leave MT Votes and go to another web service to verify the ID number.

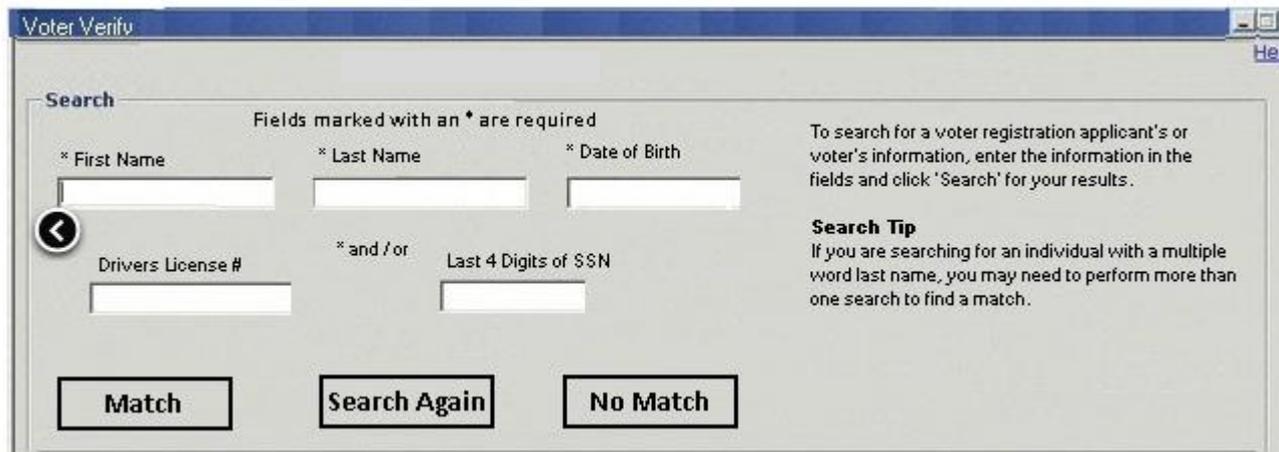
The voter verify system has been incorporated into MT Votes. Now, if a voter's driver's license number does not verify through the internal MT Votes check, or if the ID# is a partial SSN, a web service will automatically run the voter verify check.

You do not leave MT Votes for this service. You can run multiple variations in the search like you do now.

You can also access the voter verify service from the MT Votes home screen menu if necessary, rather than from the voter's record.

# Coming later this month

If MT Votes can not automatically verify the voter, you will be prompted with a Verification search box, much like our current Voter Verify process. The search box will allow you to enter new data and **Search Again**, exit the search through the **No Match** button and select the record as a **Match** if the information is verified.

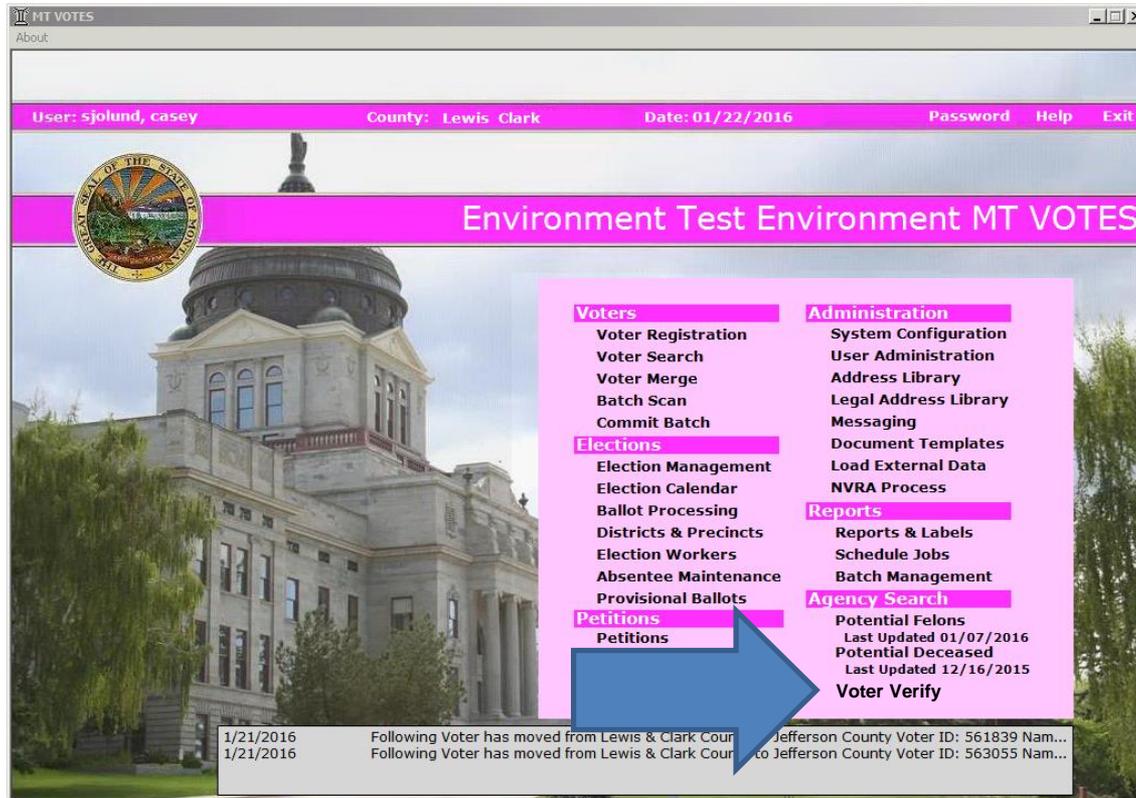


The screenshot shows a web application window titled "Voter Verify". The main content area is titled "Search" and includes the instruction "Fields marked with an \* are required". There are five input fields: "\* First Name", "\* Last Name", "\* Date of Birth", "Drivers License #", and "Last 4 Digits of SSN". The "Last 4 Digits of SSN" field is preceded by "\* and / or". To the right of the input fields is a "Search Tip" section with the text: "To search for a voter registration applicant's or voter's information, enter the information in the fields and click 'Search' for your results." Below the input fields are three buttons: "Match", "Search Again", and "No Match". A "Help" link is visible in the top right corner of the window.

# Coming later this month

You will be able to access a stand-alone Voter Verify Module from the MT Votes home screen under the Agency Search.

Using this module will not change a voter record, it will only notify you if the information you enter is verified.



# January 2016 Release

You can see all items and that were in this release by going to the About > Release Notes Section of MT Votes.

# THANK YOU!

METAC is a **big** time commitment. We really appreciate all of the effort put forward by each member of METAC. We know it's not always a fun and easy process.

Audrey, Bonnie, Bret, Charlotte, Jody, Kathie, Sandi and Vickie, **Thank you!**