Absentee - Tracking Only

WisVote includes simplified absentee processes election officials can use to track required absentee ballot information, but who do not need additional features such as printing labels.   This training guide provides instructions for clerks who choose to use these Tracking Only features.

The absentee ballot tracking process involves the following steps.

1   Enter absentee applications. Absentee applications can be entered into WisVote any time, whether submitted before or after absentee ballots are available for the election. Absentee applications that encompass multiple elections such as calendar year or indefinitely confined only need to be entered once and the system will automatically enter that application for you under every election that applies.

2   Issue Ballots. Ballots need to be issued in WisVote once ballots become available for the election, for all requests that are on file. Ballots can also be issued in WisVote immediately for absentee applications that are received after absentee ballots are available, and In-person absentee voting is also supported in WisVote.

3   Mark Ballots as Returned. As voters return absentee ballots to the clerk, the ballots must be marked in WisVote to indicate that they were returned. For In-Person absentee voting, WisVote automatically marks the ballots as returned.

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Absentee – Tracking Only   Enter An Absentee Application

Absentee Application

Prior to adding a new absentee application, a voter must have a voter record in WisVote. For Military voters who are not required to register prior to voting absentee, a new GAB-131 must be entered into WisVote using information gathered from the absentee application before the absentee application can be created.

Users should only enter complete absentee applications into WisVote. An absentee application must include the following to be considered complete: date(s) of the election(s), residential (home) address, municipality, mailing address (if different from residential address), and the signature of the voter requesting the ballot.

There are multiple ways to add an absentee application in WisVote. The most common are:

- The Absentee Applications Tile (Voter category): Use this mostly for absentee applications that affect multiple elections such as Calendar year or Indefinitely Confined requests. These absentee applications only need to be entered once and the system will automatically add the absentee application for every election that applies

- The Absentee Applications Tile (within a specific election): Use this mostly for election-specific absentee requests. The election information will automatically populate in the absentee application

- The Election Information page within the Elections Tile: Use the Vote In-Person button on the specific election page to enter in-person absentee applications. This option is only available during the in-person absentee voting period

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Enter an Absentee Application

1. Click the Absentee Applications tile to open the Absentee Application View page

2. Click the +New button to open a new Absentee Application form

3. Enter the name of the voter in the Voter Name field to search for the voter record

    Note: Search by "Last Name, First Name" or "Last Name*First Name". Partial names and wildcards may be used. Examples: "Doe, John" "Doe*Jane"

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4. If the voter record is not found in the drop-down list of search results, click "Look Up More Records" to display more records or refine the search parameters

5. If a matching voter record is still not found, and a new voter application must be entered, click the +New button in the Look Up Record window to add a new voter registration
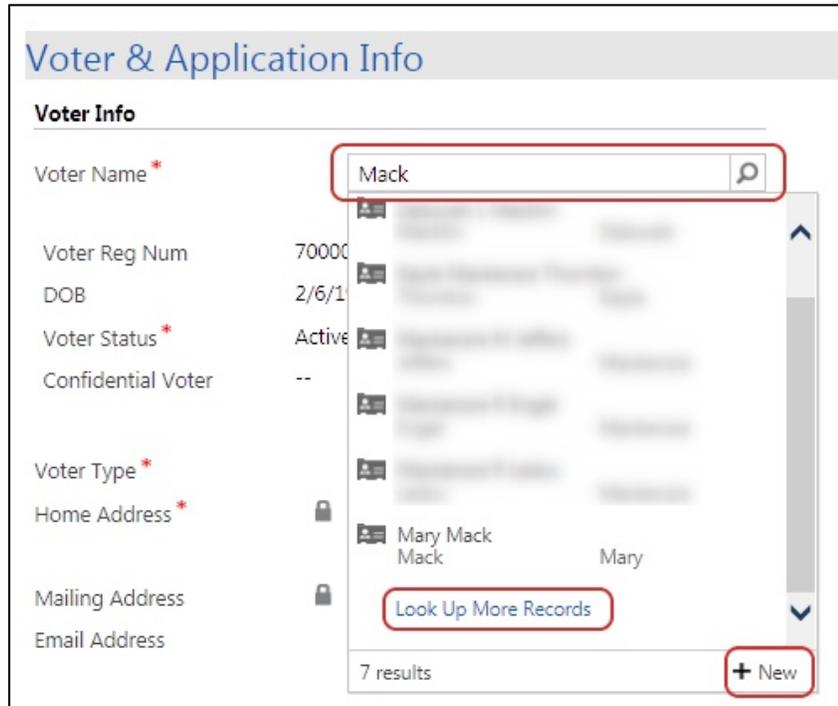
6. Once the new voter form is complete, the system will redirect you back to the absentee application with the Voter Info section of the application automatically populated

7. If the voter record is found in the drop-down list of search results, click the voter record to assign the new absentee application to the voter
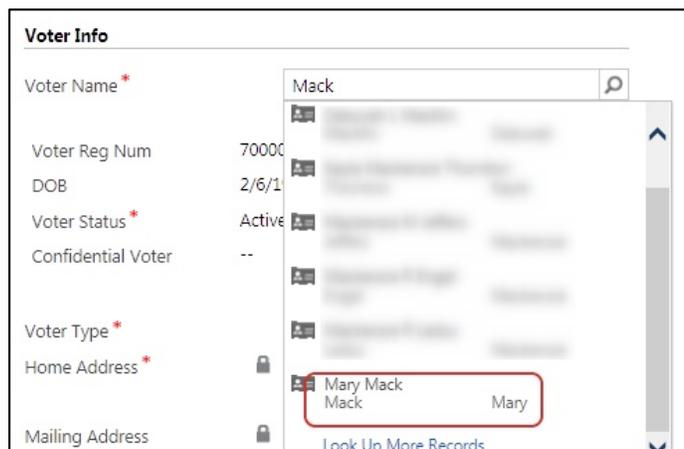
8. Verify the voter home address and mailing address (if applicable) on the new absentee application form is correct. (If the ballot needs to be mailed to a different address, see the **Mail an Absentee Ballot to a Different Address** section below)

9. Enter an email address if the applicant has provided one

10. Select the Ballot Delivery Method from the drop-down list

11. Select the Application Type from the drop-down list

    Note: If the voter type is Military, Overseas, or Presidential Only,
            the application type will automatically default to the voter type

12. Select the Application Source from the drop-down list

13. Check the FPCA box if the application was submitted on a Federal Post Card Application

14. Enter a Batch Name if you use batches for issuing ballots and printing mailing labels

15. Check the Photo ID Provided box if the applicant has provided a photocopy of their proof of
    identification. If the applicant has already provided their proof of identification, the Photo ID
    Provided box will be checked

    Note: Information updated and saved on the new absentee application
            form will automatically be updated in the voter record

16. Select the Absentee Period for the request from the drop-down list; additional Election Info fields will display when the absentee period is chosen

17. If you select Current Election, the Name of Election field will appear. Click the magnifying glass and select the election from the list. If you select Calendar Year or All Future Elections, no further choices are required.
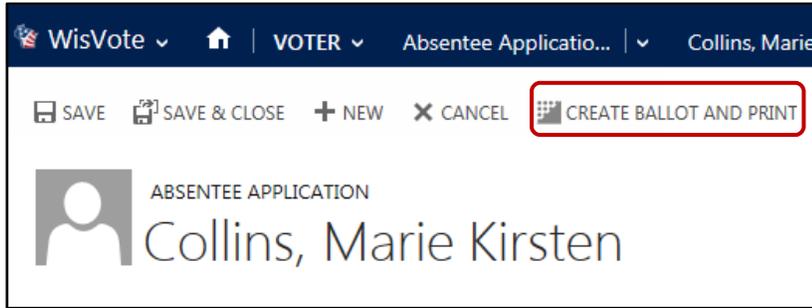

18. Click Save or Save and Close

    a. Save & Close: If absentee ballots are not yet available for the upcoming election, click Save & Close to save the absentee application. (To issue ballots for absentee requests that are on file once ballots become available, see the **Issue Absentee Ballots** sections below)

    b. Save: If absentee ballots are available at the time the absentee application is entered, click Save to immediately issue a ballot

       To issue a ballot for Calendar Year or Indefinitely Confined absentee ballot requests, follow these additional steps:

          i.   Scroll down to view Election Specific Absentee tab

          ii. Expand the Election Specific Absentee tab

          iii. Scroll down to the bottom again

          iv. Click on the Election Specific Absentee Application for the current election to open the application

19. Click the Create Ballot and Print button

20. Select the No Label field if mailing labels are not desired; if the no label option is selected, the Ballot Sent Date field will automatically populate to the date the ballots are issued
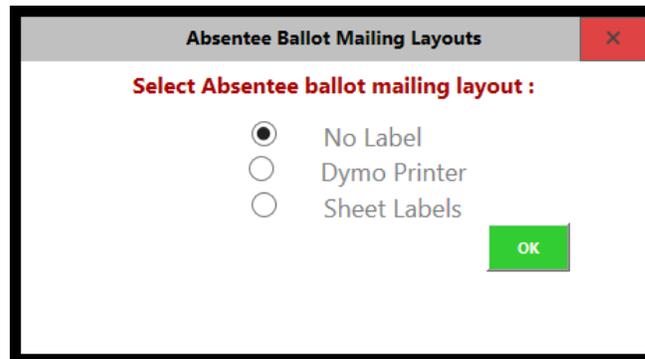
Mail an Absentee Ballot to a Different Address

1. Follow steps 1 through 7 above

2. Check the Different Absentee Address box if the ballot delivery method is by mail and the voter is requesting the ballot be sent to an address different from the mailing or home address

Ballot Delivery Info

Ballot Delivery Method *	Mail
Different Absentee Address	☑
Absentee Address *	--

3. Type the address in the Absentee Address field, then press enter; if the address is not found, click the +New button to enter a new mailing address

   Note: Only enter the house number and street name when searching for an address

   Absentee Address *   123 GRANT   🔍

   No records found. Create a new record.

   Look Up More Records

   Activities and Notes

   ACTIVITIES   NOTES   + New

   No records founds.

4. If the address is not found in the Mailing Address window, select the Address Format

Mailing Address

Address Format *	Mailing
	PO BOX
Address Line 1 *	Foreign
Address Line 2	--

5. Fill out the appropriate address fields

6. Enter the Jurisdiction

7. Mailing and PO Box addresses will be automatically verified and updated to match postal standards. Select the Override Postal Standards box if the automatically updated version of the address is not correct

8. Click Save to save the address and return to the absentee application

Absentee Ballot Tracking

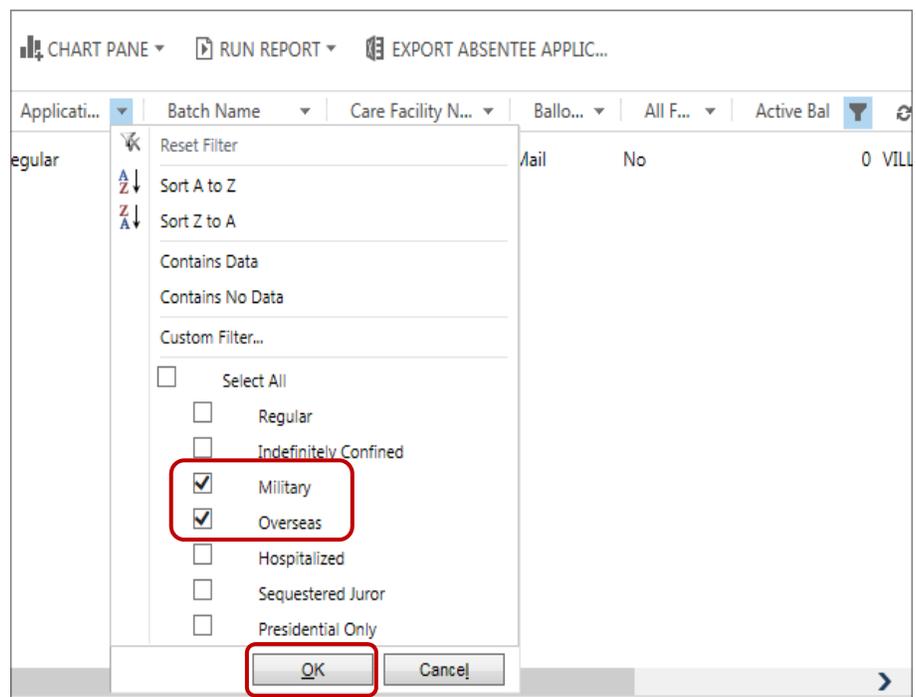The following guidance details how to track absentee ballots in WisVote without printing labels.

Issue Multiple Absentee Ballots

1. Click the Elections tile

2. Click the name of the election

3. Ensure the Contests Complete and Candidates Complete checkpoints **are** checked

4. Click the drop-down arrow to the right of the name of the election to display the navigation bar

5. Click the Absentee Applications tile
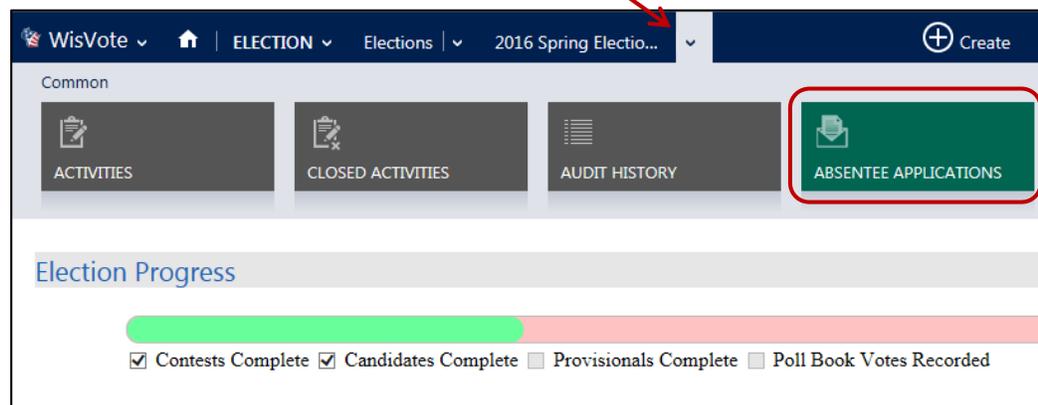
6. On the Absentee Application View page, search for the absentee application record in the Absentee Application Associated view grid

7. To filter for specific absentee application types, click the filter icon, then click the Absentee Type field, select the desired types, and then click OK

8. Select the absentee application records, then click Issue Ballots

9. The Sent Date for the issued ballots will be automatically set to the date the ballot was issued (See below to make modifications to the date)

Issue Absentee Ballots as a Batch

1. Click the Elections tile

2. Click the name of the election

3. Ensure the Contests Complete and Candidates Complete checkpoints **are** checked

4. Click the drop-down arrow to the right of the name of the election to display the navigation bar

5. Click the Absentee Applications tile
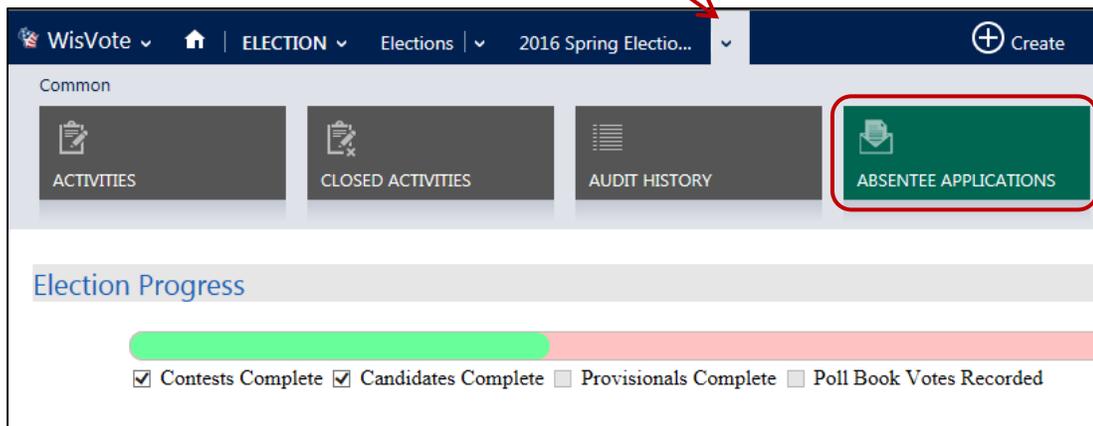
6. To issue ballots and generate mailing labels as a batch, click the Issue Batch Ballots button

7. In the New Batch Absentee Request window, enter a description for the batch. Verify that the correct election is selected

8. Select the Application Type if desired. (Batches can also be run by ballot delivery method or by Batch Name on Absentee)

9. Select the No Label field to use the track-only absentee feature

Note: If this option is selected, the Ballot Sent Date field will automatically populate with the date the batch was created

Important note about entering names into the Batch Name on Absentee field:

- If the Batch Name on Absentee ballot field is left blank, all of the outstanding absentee applications that match the application type, delivery method and care facility (if applicable) will be included in the batch

- If a batch name is entered in the Batch Name on Absentee ballot field, ONLY the absentee applications that have the exact same batch name on their absentee application will be included in the batch

10. To finish creating the batch request, click Save

11. Click the ellipses at the top of the Batch Absentee Request page to display additional actions, then select "Run Workflow" from the drop-down list
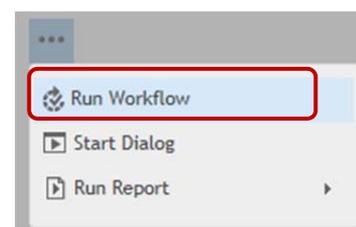
12. A Look Up Record window will appear, click the Add button

13. In the confirmation window click OK to submit the absentee batch request

   Note: it may take up to 15 minutes to complete the workflow

14. To verify all of the ballots were issued, click the drop-down arrow to the right of the batch request name to display the navigation bar, then click the Absentee Ballots tile

Update the Absentee Ballot Sent Date Field for Ballots Already Issued

1. Click the Elections tile

2. Click the name of the election

3. Click the drop-down arrow to the right of the name of the election to display the navigation bar

4. Click the Absentee Ballots button
   (Click the arrow to proceed across the bar to view more tiles)

6. Select the absentee ballot record or multiple absentee ballot records to update

7. Click the Set Ballots Sent Date button

   Note: the Set Ballots Sent Date button will not display unless a record is selected

8. Edit the date in the Set Ballots Sent Date window then click OK

   Note: refresh the screen to view the updated ballot sent date field

Set Ballots Sent Date   ✕

Please provide Ballot sent date:

Mon Mar 7 2016   OK

Enter an In-Person Absentee Application

1. Click the Elections tile

2. Click the name of the election

3. Click the Vote In-Person button at the top of the page to open a New Absentee Application form

4. Enter the name of the voter in the Voter Name field to search for the voter record

   Note: Search by "Last Name, First Name" or "Last Name First Name". Partial names and wildcards may be used. Examples: "Doe, John" "Doe*Jane"

5. If the voter record is not found in the drop-down list of search results, click "Look Up More Records" to display more records or refine the search parameters

6. If a matching voter record is still not found, and a new voter application must be entered, click the +New button in the Look Up Record window to add a new voter registration

7. Once the new voter form is complete, the system will redirect you back to the absentee application with the Voter Info section of the application automatically populated

8. If the voter record is found in the drop-down list of search results, click the voter record to assign the new absentee application to the voter
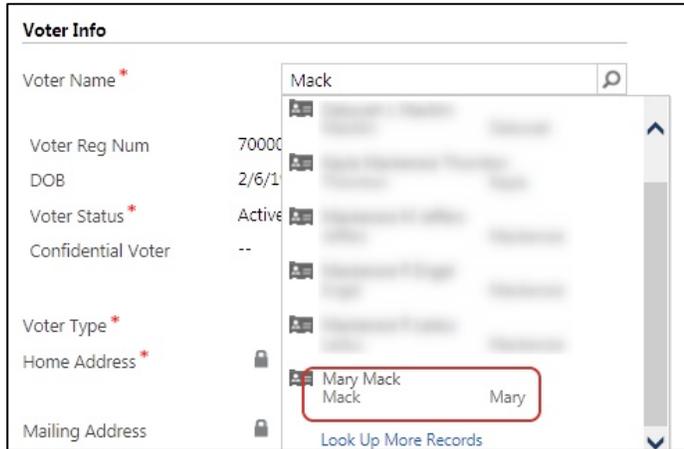
9. Click Save to save the information on the Absentee Application form

10. Click the Create Ballot and Print button at the top of the absentee application form to issue an absentee ballot
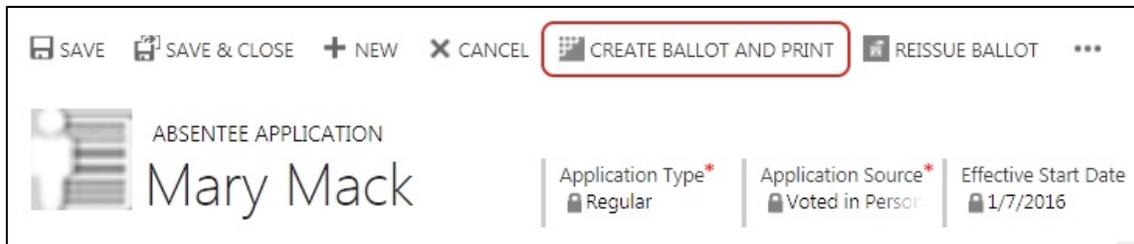
11. Select the No Label options in the Absentee Ballot Mailing Layout window, then click OK to return to the Election Information page

Record Returned Absentee Ballots

1. Click the Elections tile

2. Click the name of the election

3. At the top of the Election Information page, click the drop-down arrow to the right of the name of the election

4. Click the Absentee Ballots tile in the navigation bar to open the Absentee Ballots view page

5. In the Absentee Ballots Associated View page, select the absentee ballot record to be recorded as returned by selecting the checkbox in the far left column of each record

6. lick the Mark Ballots as Returned button

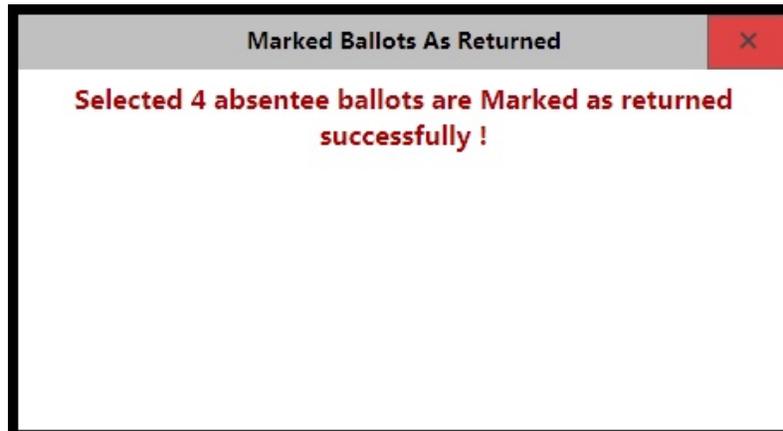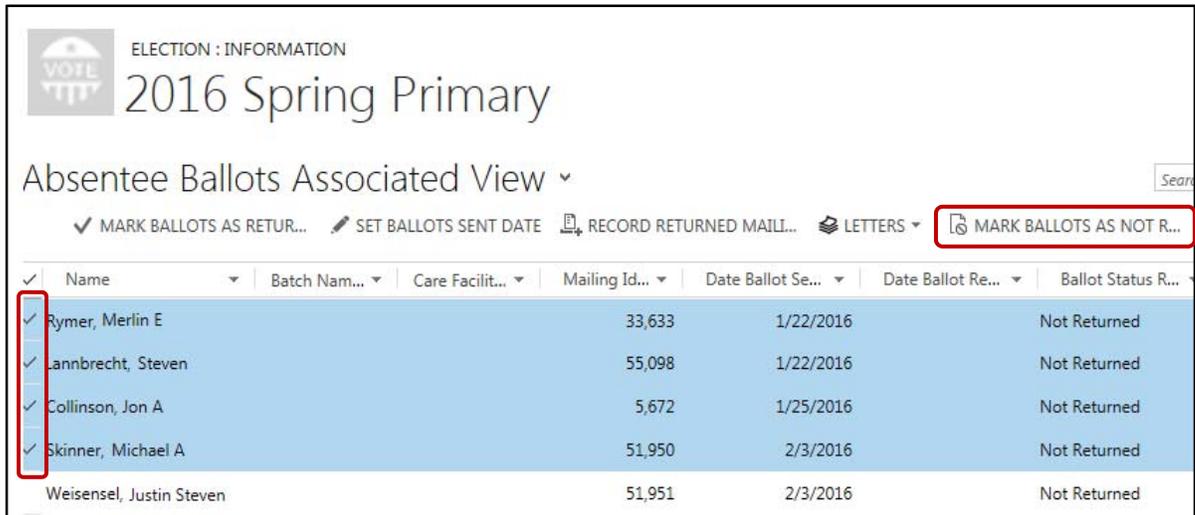7. A confirmation window will appear confirming the number of ballot that have been marked as returned

8. To review the updated absentee ballot records, refresh the Absentee Ballots Associated View page; the Ballot Status Reason and the Date Ballot Returned fields will be updated in the Absentee Ballots Associated grid

Record Ballots as Unreturned

If a ballot is marked as Returned in error, it can be marked as Unreturned using the following steps:

1. In the Absentee Ballots Associated View page, select the absentee ballot record to be recorded as not returned by selecting the checkbox in the far left column of each record

2. Click the Mark Ballots as Not Returned button

3. A confirmation window will appear confirming the number of ballot that have been marked as not returned
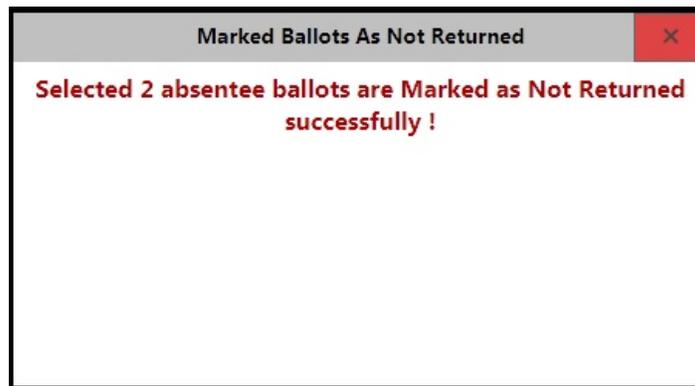
4. To review the updated absentee ballot records, refresh the Absentee Ballots Associated View page; the Ballot Status Reason field will be updated in the Absentee Ballots Associated grid