



REGISTRAR OF VOTERS

Adding CVR and Provisional Voters to the Provisional Voter Module

PROCEDURE DOCUMENT – Version 1.0

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Adding Voters to the Provisional Voter Module

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Scope

This procedure details how to add CVR voters and provisional voters to the Provisional Voter Module in DIMS. It distinguishes between the processes for adding CVR and provisional voters as they are similar but treated differently by the module. It does not explain how to add voters who would be challenged as “Voter Not Registered,” or “Voted Wrong County.”

Definitions

- **CVR:** Conditional Voter Registration. The affidavit side of the provisional envelope is the conditional voter registration side and if a voter fills it out, we will register them to vote. If they have a valid registration, we will count their ballot even if they were not previously registered to vote.
- **Provisional Voter:** A voter who has voted provisionally, but either did not use the affidavit side of the envelope or did not provide enough information on it for it to be a valid registration.
- **Provisional Module:** The module in DIMS where provisional voters are processed, and their ballots are adjudicated.
- **Challenge code:** A code used in the provisional voter module to challenge ballots that will not be counted.
- **Control Number:** A number on the top right corner of either side of a provisional envelope that is unique to that envelope.
- **Green Light:** A light in the provisional module indicating that a voter has not already cast a ballot.
- **Yellow Light:** A light in the provisional module indicating that a voter has outstanding Votecal messages in the import table, which need to be processed before the voter’s ballot can be counted.
- **Red Light:** A light in the provisional module indicating that the voter already has an accepted ballot.
- **VBM:** A Vote-By-Mail Ballot, usually abbreviated to **VBM**.

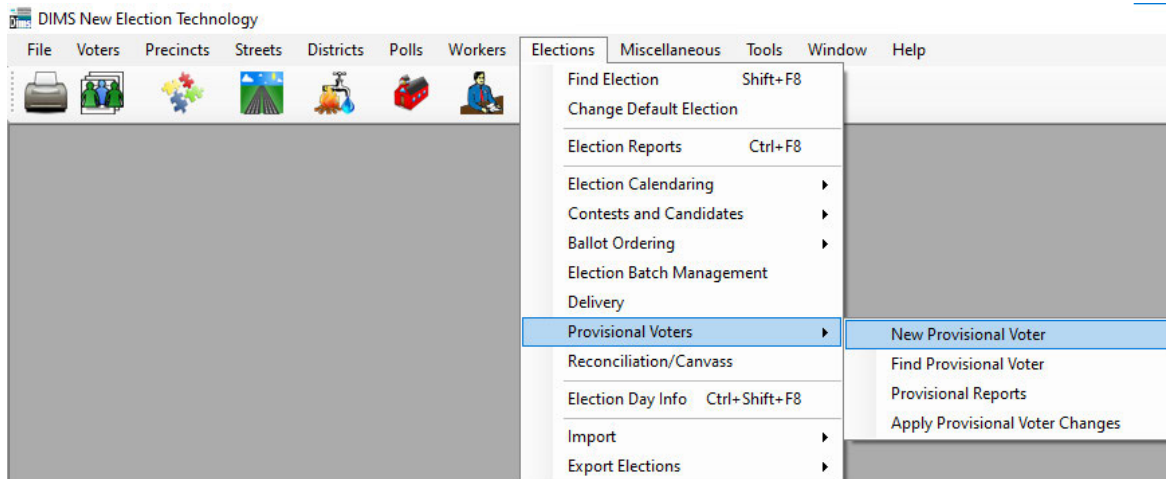
Determining Which Process to Use

- 1) Your lead should inform you beforehand whether you are working on **CVRs** or **Provisionals** beforehand.
 - a) If they did not, ask your lead whether you are working on **Provisionals** or **CVRs**.
- 2) If you have a stack of **CVR's** then proceed to the **Adding CVR Voters to the Provisional Voter Module** section on this page and follow the directions there.
- 3) If you have a stack of **Provisionals** proceed to the **Adding Provisional Voters to the Provisional Voter Module** section on page 7.

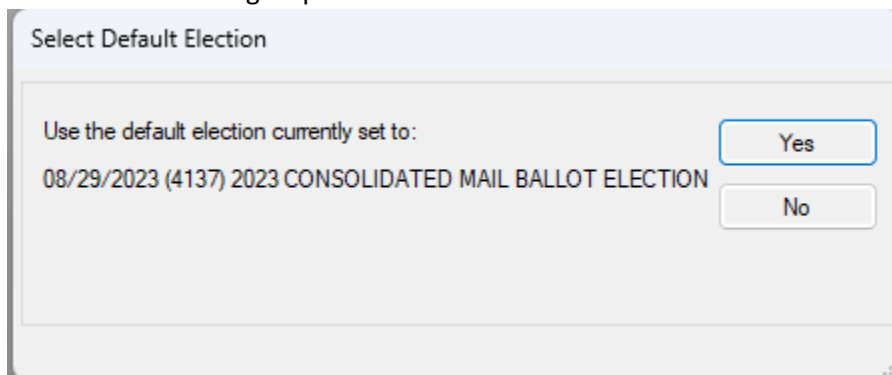
NOTE: If you are unsure ask your lead

Adding CVR Voters to the Provisional Voter Module

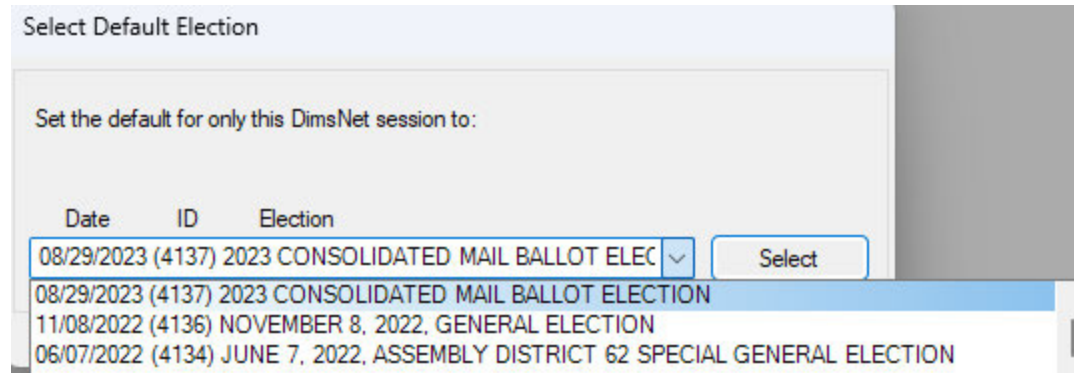
- 1) Log in to DIMS.net.
- 2) Click on the **Elections** drop-down menu at the top. Mouse over **Provisional Voters** and select **New Provisional Voter**.



- 3) The **Select Default Election** window will pop up if you have not already set the default for this session of DIMS.
 - a) If you already have set it to the current election, then skip to step 4. Otherwise proceed through the following steps.

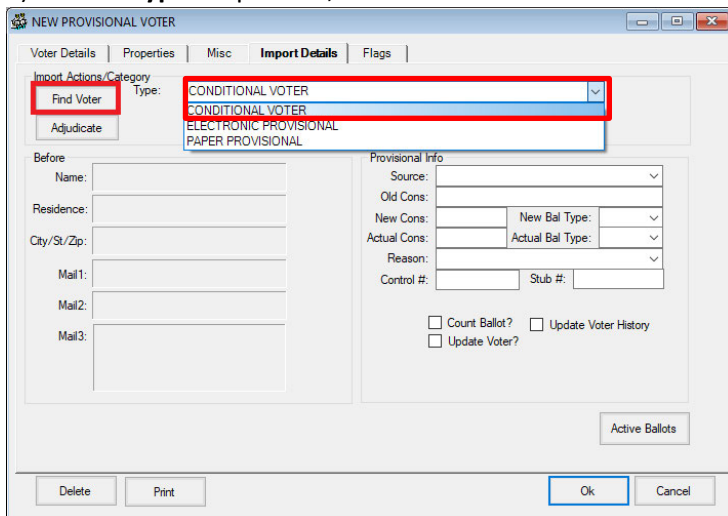


- b) If the listed election is the current one, then select **Yes** and move to step 4.
- c) If the listed election is not the current one, select **No**, and then select the correct election from the dropdown menu that appears.

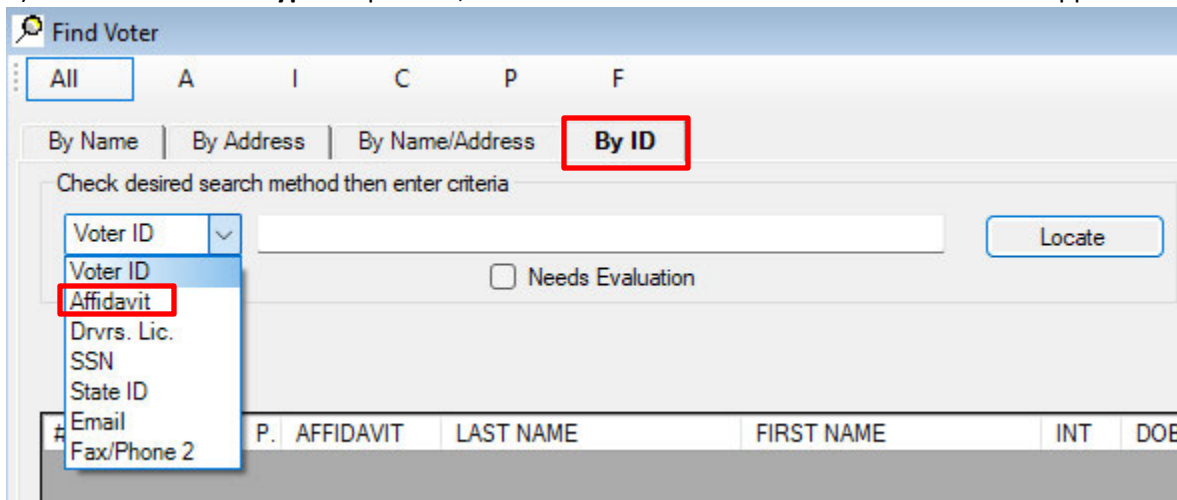


d) Click **OK** on the “Selection Confirmed” notification window.

4) In the **Type** drop-down, select **Conditional Voter**.



5) To the left of the **Type** drop-down, click on **Find Voter**. The **Find Voter** window will appear.



6) Click on the **By ID** tab and in the drop-down menu, select **Affidavit**. Search for the voter using the affidavit number on the envelope.

- a) If no one comes up, confirm you have entered the number correctly.
- b) If the number was entered correctly and you cannot locate the voter refer to your lead.

7) Verify that the populated voter information matches what is on the envelope.

8) Check the voter’s **Status**.

- a) If it is **Active, Inactive, or Pending**. Move on to step 9.
- b) If the voter's **Status is Cancelled or Fatal** notify your lead and follow their direction. Start with the next envelope afterwards.

Note: Cancelled voter rows will appear in red, and the Status column will display a "C." Fatal voter rows will appear in black, and the Status column will display a "F."

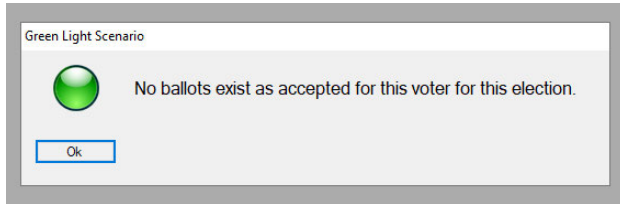
| # | STATUS | P. | LAST NAME |
|----|--------|----|-----------|
| 42 | C | | |
| 43 | C | | |
| 44 | C | | |
| 45 | C | Y | |
| 46 | C | Y | |

| # | STATUS | P. | LAST NAME |
|---|--------|----|-----------|
| 1 | F | | |
| 2 | F | Y | |
| 3 | F | Y | |
| 4 | F | Y | |

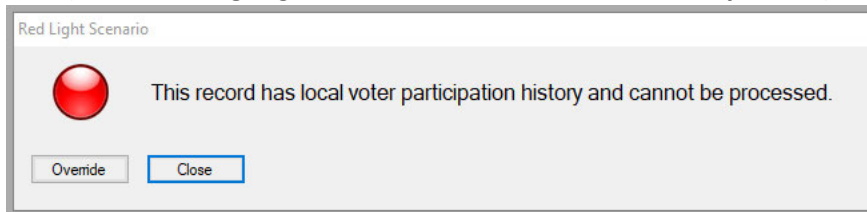
- 9) Double-click on the voter to bring them into the Provisional Module.
 - a) If the information does not match refer to your lead.
- 10) Click on the **Import Details** tab in the voter's record.

- 11) Using the **Source** drop-down select **Poll Place**.
- 12) Tab through the **Old Cons, New Cons, and New Bal Type** fields.
- 13) Enter the number found in the **New Cons** field into the **Actual Cons** field.
- 14) Tab through the **Actual Bal Type** field.
- 15) Tap the envelope against your desk so that the ballot inside moves to block the hole at the bottom of the CVR.
 - a) If there is no ballot inside the envelope, then proceed to the **Ballot Missing From Envelope** section on page 12.
- 16) Press tab until reaching the **Reason** field. Type "I" to select **In Review** from the drop-down menu. Press Tab.
- 17) In the **Control #** field, use the hand scanner to scan in the control number found on the upper right-hand corner of the envelope.

- 18) **BEFORE** clicking **OK** on the notification box that appears, verify that the number in the **Control #** field matches the control number on the envelope.
- 19) Based on the light that appears in the notification window proceed to the relevant subsection.
 - a) For **green light**, go to the **Green Light CVR Scenario** subsection below.



- a) For a **yellow light** go to the **Yellow Light CVR Scenario** section below.
- b) For a **red light** go to the section names **Voter Already Voter (Red Light Scenario)** on page 11.



- c) If you encounter any other scenario aside from the 3 listed above, refer to your lead.

Green Light CVR Scenario

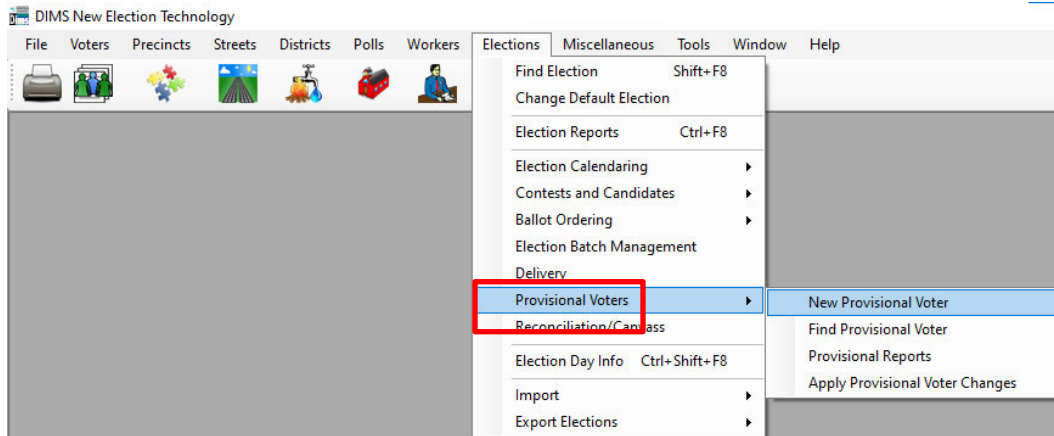
- 1) In the case of a **green light** click **Continue** or **Ok** and the record will close.
- 2) Place this envelope in a stack for **green light envelopes**.
- 3) Proceed to the next envelope and start again from step 1 in **Adding CVR Voters to the Provisional Voter Module on page 3**.
- 4) If you have completed all your envelopes let your lead know so that they can move them to the relevant trays.

Yellow Light CVR Scenario

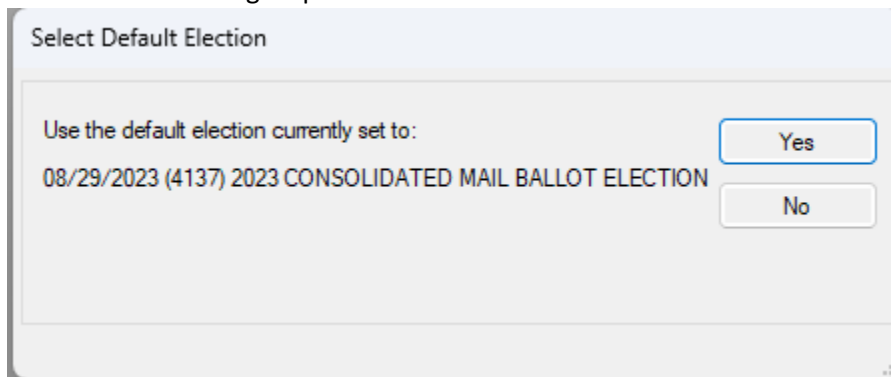
- 1) In the case of a **yellow light** read the message on the notification window.
 - a) If it says *"This voter may appear on the Official List in another county. If accepting the ballot, please check the VoteCal Bingo Board before proceeding to count the ballot. Click Cancel to check the Bingo Board or click Continue to override this message and process the ballot,"* then treat this envelope as a **green light** and follow the steps above in **Green Light CVR Scenario**.
 - b) If it has any other yellow light message click **Continue** to close the notification window.
 - i) Place this envelope in a stack for **yellow lights**.
- 2) Proceed to the next envelope and start again from step 1 in **Adding CVR Voters to the Provisional Voter Module on page 3**.
- 3) If you have completed all your envelopes let your lead know so that they can move them to the relevant trays.

Adding Provisional Voters to the Provisional Voter Module

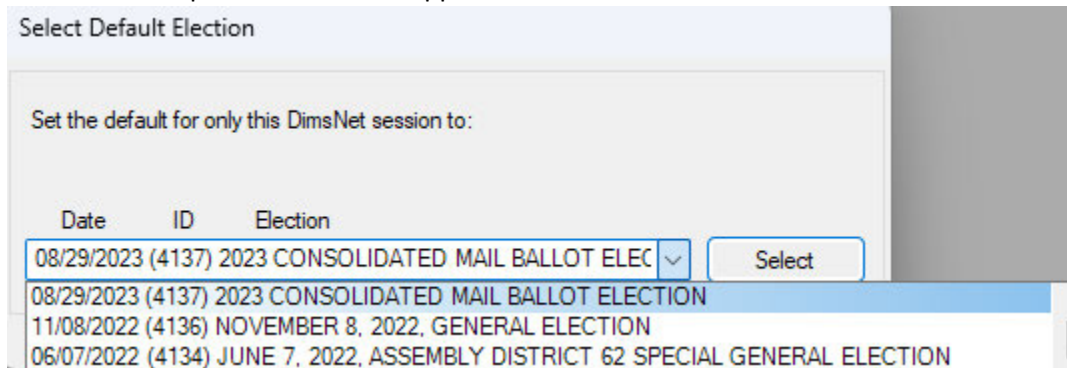
- 1) Log in to DIMS.net.
- 2) Click on the **Elections** drop-down menu at the top. Mouse over **Provisional Voters** and select **New Provisional Voter**.



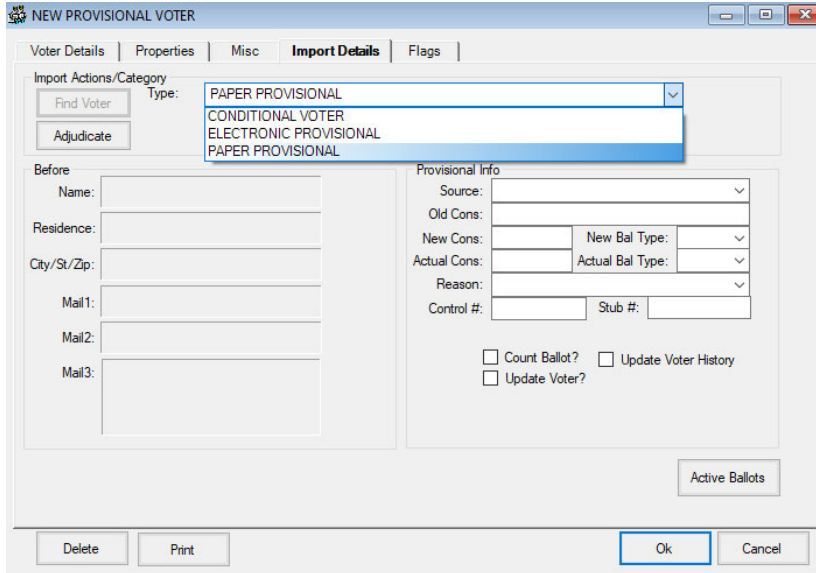
- 3) The **Select Default Election** window will pop up if you have not already set the default for this session of DIMS.
 - a) If you already have set it to the current election, then skip to step 4. Otherwise proceed through the following steps.



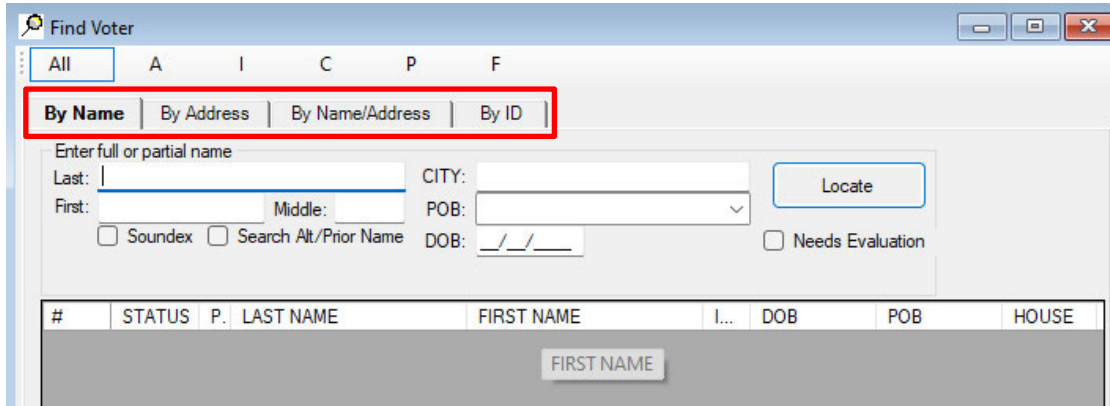
- b) If the listed election is the current one, then select **Yes** and move to step 4.
- c) If the listed election is not the current one, select **No**, and then select the correct election from the dropdown menu that appears.



- d) Click **OK** on the "Selection Confirmed" notification window.
- 4) In the **Type** drop-down, select **Paper Provisional**.



5) To the left of the **Type** drop-down, click on **Find Voter**. The **Find Voter** window will appear.



- 6) Use the information provided by the voter on the envelope and the receipt to try and find them.
 - a) Some voters partially fill out the affidavit side of the envelope so try to use some of this information to locate them if available.
 - b) The other tabs (**By Address**) (**By ID**) are also useful if you have the relevant information for them.
 - c) Use **wildcards** for parts that are difficult to read.
 - d) If the voter is **Cancelled**, **Fatal**, or you **cannot find their record**, then proceed to the section named **Cannot Find Voter** on page 12.
- 7) Once you find them, double click on them to bring them into the provisional module.

8) Click on the **Voter Details** tab at the top.

9) Click on the **Image** button on the upper left side to pull up the voter's signatures.

10) Verify that the signature on the envelope compares to those in the voter's record.

a) If the voter did not sign the envelope then proceed to the section named **Signature Missing** on page 12.

b) If the signature does not match, then proceed to the section named **Non-Matching Signature** on page 12.

11) Confirm that there is a ballot in the envelope by tapping it against your desk until the ballot blocks the hole near the bottom of the envelope.

a) If there is no ballot in the envelope refer to the **Ballot Missing From Envelope** section on page 12.

12) Click on the **Import Details** tab.

13) Using the **Source** drop-down select **Poll Place**.

14) Tab through the **Old Cons**, **New Cons**, and **New Bal Type** fields.

15) Enter the number found in the **New Cons** field into the **Actual Cons** field.

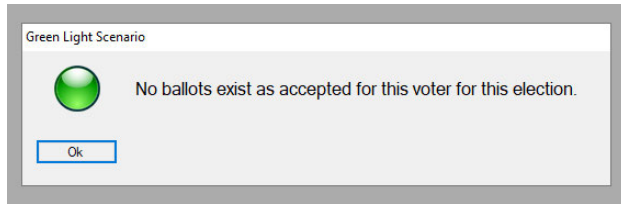
16) Press tab until reaching the **Reason** field. Type "I" to select **In Review** from the drop-down menu.

17) In the **Control #** field, use the hand scanner to scan in the control number found on the upper right-hand corner of the envelope.

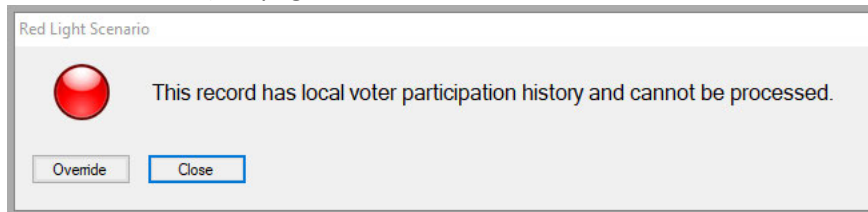
18) **BEFORE** clicking **OK** on the notification box that appears, verify that the number in the **Control #** field matches the control number on the envelope.

19) A **green**, **red**, or **yellow** light notification box will appear.

- a) If a **green light** appears then proceed to the section named **Green Light Provisional Scenario** below.



- b) If a **yellow light** appears then proceed to the section named **Yellow Light Provisional Scenario** below.
- c) If a **red light** appears then proceed to the section named **Voter Already Voter (Red Light Scenario)** on page 11.



- d) If you encounter any other scenario aside from the 3 listed above, refer to your lead.

Green Light Provisional Scenario

- 1) In the case of a **green light** click **Continue** or **Ok** and the record will close.
- 2) Place this envelope in a stack for **green light envelopes**.
- 3) Proceed to the next envelope and start again from step 1 in **Adding Provisional Voters to the Provisional Voter Module** on page 7.
- 4) If you have completed all your envelopes let your lead know so that they can move them to the relevant trays.

Yellow Light Provisional Scenario

- 1) In the case of a **yellow light** read the message on the notification window.
 - a) If it says *"This voter may appear on the Official List in another county. If accepting the ballot, please check the VoteCal Bingo Board before proceeding to count the ballot. Click Cancel to check the Bingo Board or click Continue to override this message and process the ballot,"* then treat this envelope as a **green light** and follow the above steps in **Green Light CVR Scenario**.
 - b) If it has any other yellow light message click **Continue** to close the notification window.
 - i) Place this envelope in a stack for **yellow lights**.
 - ii) Proceed to the next envelope and start again from step 1 in **Adding Provisional Voters to the Provisional Voter Module** on page 7.
 - iii) If you have completed all your envelopes let your lead know so that they can move them to the relevant trays.

Challenges

This section details the challenges you may run into, and which codes to use.

Voter Already Voted (Red Light Scenario)

- 1) In the case of a Red Light, click **Close** on the pop-up window. Use the Reason drop-down menu to select **Voter Already Voted (VAV)**.

Provisional Info

Source:

Old Cons:

New Cons: New Bal Type:

Actual Cons: Actual Bal Type:

Reason: **VOTER ALREADY VOTED**

Control #: Stub #:

Count Ballot? Update Voter History
 Update Voter?

Active Ballots

- 2) Click on the **Active Ballots** button in the bottom right. The following window should appear.

Active Ballots -- VBMs: 1 Provisionals: 1 Polls: 1

| ID | Date | Title | SOS_ID | VBM | Prov | CVR | Poll/VC | County |
|----|------------|--|--------|-----|------|-----|---------|----------------|
| 1 | 09/14/2021 | SEPTEMBER 14, 2021, CALIFORNIA GUBERN... | 5225 | I | VAV | | Yes | San Bernardino |

A = ACCEPTED
R = RETURNED
S = SUSPENDED
I = ISSUED, NOT RETURNED

Ok

- 3) At the bottom of the envelope in the **Office Use Only** section, use a **red** pencil to mark in the **First Check** section as follows:
 - a) Write a check in the **No Count** box.
 - b) Using the window determine what method the voter used to vote.
 - i) In the active ballots window if the **Polls** column has a "Yes" in it write **VAV Polls** on the line beside the **No Count** box.
 - ii) If the **VBM** column has an "A" in it, write **VAV VBM** on the line beside the **No Count** checkbox.

- iii) If you are unsure which code to put, refer to your lead.
- c) Write your initials in the **Initials** field.
- 4) Click **Ok** in the active ballots window to close it. Click **Ok** to close the record.
- 5) Set this envelope aside in a **Challenge** stack.
- 6) Move onto the next envelope and return to the instructions related to that type of envelope.
- 7) If you have no more envelopes notify a lead so that they can be moved to the correct place.

Ballot Missing From Envelope

- 1) If the ballot is missing from the envelope, go to the **Import Details** tab, and in the **Reason** dropdown select **Ballot Missing From Envelope**.
- 2) Click **OK**.
- 3) On the envelope in the **Office Use Only** section at the bottom, in the **First Check** section check the **No Count** box.
- 4) On the line beside the **No Count** box write **BME**.
- 5) Write your initials in the **Initials** section.
- 6) Set this envelope aside in a **Challenge** stack.
- 7) Move onto the next envelope and return to the instructions related to that type of envelope.
- 8) If you have no more envelopes notify a lead so that they can be moved to the correct place.

Cannot Find Voter

- 1) If you find the voter and they are **Fatal** or **Cancelled**, or you cannot find the voter then refer to a procedure titled "**Adding Out of County, Out of State, & Voters Not Registered to the Provisional Module.**"
 - a) If you do not have this procedure, then let your lead know.

Signature Missing

- 1) If the voter did not sign either side of the envelope, then go to the **Import Details** tab, and in the **Reason** dropdown select **No Voter Signature**.
- 2) Click **OK**.
- 3) On the envelope in the **Office Use Only** section at the bottom, in the **First Check** section check the **No Count** box.
- 4) On the line beside the **No Count** box write **NVS**.
- 5) Write your initials in the **Initials** section.
- 6) Set this envelope aside in a **Challenge** stack.
- 7) Move onto the next envelope and return to the instructions related to that type of envelope.
- 8) If you have no more envelopes notify a lead so that they can be moved to the correct place.

Non-Matching Signature

- 1) If the signature on the envelope does not match the signature on the voter's record, go to the **Import Details** tab, and select **Non-Matching Signature** from the dropdown.
- 2) Click **OK**.
- 3) On the envelope in the **Office Use Only** section at the bottom, in the **First Check** section check the **No Count** box.
- 4) On the line beside the **No Count** box write **NMS**.

- 5) Write your initials in the **Initials** section.
- 6) Set this envelope aside in the **Challenge** stack.
- 7) Move onto the next envelope and return to the instructions related to that type of envelope.
- 8) If you have no more envelopes notify a lead so that they can be moved to the correct place.

Authorization

| | |
|---|-----------------------------|
| Document Owner: Voter Records | Initiation Date: 09/16/2021 |
| Version Number: 1.1 | Date: 02/15/2021 |
| Versions Written By: Christopher Rountree | 1.0 |
| Versions Written By: Damani Travis | 1.1 |