



REGISTRAR OF VOTERS

Keying CVR Affidavits

PROCEDURE DOCUMENT - Version 2.0

Keying CVR Affidavits

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Scope

The Conditional Voter Registration (CVR) process serves as means for citizens to register to vote between the 15-day close of registration (E-15) and the end Election Day (E-0). This conditional registration (affidavit) process is initiated when an individual completes a CVR Application (Envelope) at an Early Vote Location or Polling Place. Upon receipt, CVR applications are delivered to the Voter Records Department and processed in the DIMS.net system. This procedure provides the user step-by-step instructions for keying a CVR Affidavit into the DIMS.net system.

Definitions

Conditional Voter Registration – Is an affidavit of registration completed by the voter to either register for the first time, or re-register to vote.

DIMS.net – The Election Management System (EMS) used to record, store, and update voter records.

Find Street Tool – Also known as “Street Finder.” A tool in DIMS that allows a user to look up streets as they are listed in DIMS.

Pulling an affidavit – A process of rejecting an affidavit for missing essential information.

Wildcard – It is a percent sign (%). When used in some of DIMS search fields, it takes the place of one or more other characters. For example, “US Highway 18” can be searched for as “US%h%18” in DIMS.

USPS Zipcode Lookup – A tool on USPS website that can be used to find addresses that USPS delivers to.

CVR Keying Procedures

- 1) Click on **Voters** at the top.
- 2) Select **New Voter** from the dropdown menu.

Confirming That the CVR Can Be Keyed

- 1) Determine whether the CVR can be keyed or not by checking for the following criteria. **If any of the following apply**, proceed to the Section titled **Pulling A CVR** under **Special Cases on page 13**.
 - a) No **signature** on the form.
 - b) No **birth date** on the form.
 - c) No **name** on the form.
 - d) No **residence address** on the form.
 - e) If the Voter's Birth Date indicates that the voter is **under the age of 16**.
 - f) If there is a **PO Box or an SVL Box in the Residence Address** area on the affidavit.
 - g) If the residence address is **Out of County**. If you are unsure then check your list of cities.
 - h) If the '**Yes**' box is **not** checked for citizenship, **OR** if the '**No**' box is checked.
- 2) If the Voter's Name **does not match** the signature on the affidavit, alert your lead.

Voter Details Tab

The Voter Details tab is divided into sections which contain fields that enable you to enter voter information such as name and address.

County Info Section

- 1) **Voter ID**: Skip this field.
- 2) **Status**: Skip this field.
- 3) **Reason**: Skip this field.
- 4) **Affidavit**: Enter the affidavit number.
 - a) If this CVR does not yet have an affidavit number, place an affidavit number sticker in the affidavit number section on the CVR envelope. Key that number into the **Affidavit** field.
 - b) If a **Pick a Duplicate Voter** window appears, proceed to the section titled **Duplicate Voter on page 12** of this procedure.
- 5) **Sig**: Skip this field.
- 6) **Auto Sig**: Skip this field.
- 7) **DMV Lic**: Enter the **Driver's License** if it is in the California format.
 - a) The CA format is one letter and 7 numbers. Ex: A1234567
 - b) If the number does not fit this format do not enter it.
 - c) If a **Pick a Duplicate Voter** window appears, proceed to the section titled **Duplicate Voter on page 12** of this procedure.

- 8) **SSN:** Enter **ONLY** the last 4 digits, even if the entire number is written out.
 - a) If a **Pick a Duplicate Voter** window appears, proceed to the section titled **Duplicate Voter** on page 12 of this procedure.

Name Section

The screenshot shows a form titled "Name" with the following fields: Prefix (dropdown), First (text), Middle (text), Last (text), Suffix (dropdown), and Birth Date (text with slashes). Red boxes highlight the Prefix, First, Middle, Last, Suffix, and Birth Date fields.

- 1) **Prefix:** If the voter indicated a prefix (Mr, Mrs, etc), select it from this dropdown.
- 2) **First:** Enter the voter's first name.
- 3) **Middle:** Enter the voter's middle name.
- 4) **Last:** Enter the voter's last name.
- 5) **Suffix:** If the voter indicated a suffix (Jr, the third, etc), select it from this dropdown.
- 6) **Birth Date:** Enter the voter's **Birth Date**.
 - a) If the voter is under the age of 18, proceed to the subsection titled **Pending an Underage Voter on page 11**.
 - b) If a **Pick a Duplicate Voter** window appears, proceed to the section titled **Duplicate Voter on page 12** of this procedure.

Residence Section

The screenshot shows a form titled "Residence" with the following fields: Type (dropdown), Clear (button), House# (text), Frac (text), Dir (dropdown), Street (text), Type (dropdown), Post (dropdown), Bldg (text), Unit # (text), City (text), Zip (text), Prec (text), and Manual (checkbox). Red boxes highlight the House#, Frac, Dir, Street, Type, Post, Unit #, City, and Zip fields.

- 1) **House #:** Enter the house number of the voter's residence address.
- 2) **Frac:** If the voter's residence address has a fraction, enter that here.
- 3) **Dir:** If the voter's residence address has a direction prior to the street name, select that direction from the dropdown.
- 4) **Street:** Enter the street name.
- 5) **Type:** Select the street **Type** from the dropdown.
 - a) **Ex:** St for street, Dr for drive, Blvd for boulevard.
- 6) **Post:** If the voter's residence address has a direction after the street name, select that direction from the dropdown.
- 7) **Bldg:** Skip this field.
- 8) **Unit #:** Enter the unit type abbreviation and number.

- a) Ex: Unit 15, Spc 190, Apt A12, Unit B
 - b) If no unit type is written, the generic unit type is **Unit**.
 - c) Do not confuse **Post** directions (N, S, E,W, and intercardinals) for unit numbers. Check in the DIMS street tool if you are unsure.
- 9) **Zip**: Enter the zip code. When you click off of this field, the **City** and **Precinct** fields will automatically fill if the address has a precinct.
- a) If a window titled “**Pick-a-Street**” appears, or something else indicates that the address does not have a precinct proceed to the section titled **Pending an Address on page 10**.
- NOTE**: If the address does precinct, the **precinct** field will automatically fill in.
- 10) **City**: If the **Prec** field does not automatically fill, then the **City** field will not automatically fill either, so if necessary type in the full name of the city. Do not abbreviate.

Mailing Section

Mailing

Cntry: UNITED STATES OF AMERICA

CareOf:

Str/Bx:

City: St: CA Zip:

- 1) If the voter wrote a mailing address, check if the address is **within the United States**. If it is in **another country OR if it is a military address** stop keying, alert your lead, and wait for their instructions.
 - a) Military address have unique such as:
 - i) PSC, APO, DPO, FPO in the street portion
 - ii) APO, FPO, or DPO listed in the city
 - iii) AA, AE, or AP listed in the state
- 2) **CareOf**: Rarely ever used, consult with a lead if you think something should go there.
- 3) **Str/Bx**: Enter the street portion of the mailing address.
 - a) Ex: PO Box 1234, 567 Mailing St Unit 12.
- 4) **City**: Enter the City name.
- 5) **State**: Select the state from the dropdown list.
- 6) **Zip**: Enter the Zip code.

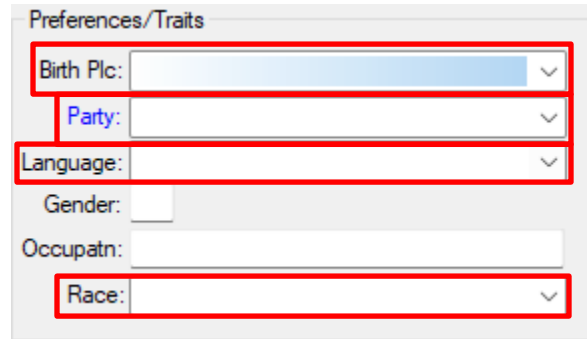
Properties Tab

- 1) Select the **Properties** tab.



The screenshot shows a navigation bar with four tabs: "Voter Details", "Properties", "Misc", and "Notices/Flags". The "Properties" tab is highlighted with a red rectangular box.

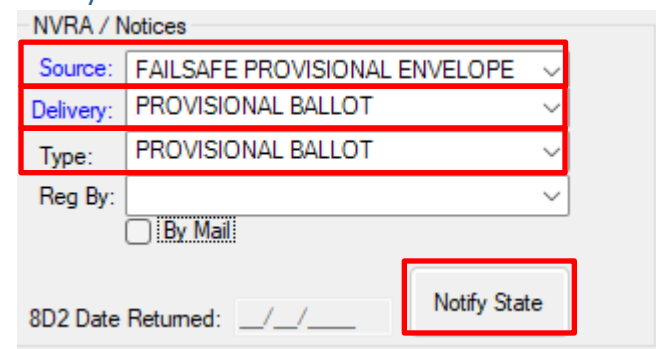
Preferences/Traits



The screenshot shows a form titled "Preferences/Traits" with several fields. The fields "Birth Plc:", "Party:", "Language:", and "Race:" are highlighted with red rectangular boxes. "Birth Plc:" is a dropdown menu. "Party:" is a dropdown menu. "Language:" is a dropdown menu. "Race:" is a dropdown menu. There are also fields for "Gender:" (checkbox), "Occupatn:" (text input), and "Reg By:" (dropdown menu).

- 1) **Birth Plc:** Select from the dropdown.
 - a) If the voter listed **U.S.** as their birthplace, do not enter anything.
 - b) If the birthplace the voter wrote is not listed, select **Other Birthplace**.
- 2) **Party:** Select the voter's party from the drop down.
 - a) If the party the voter wrote is not listed select **Other Party**.
 - b) If the voter made no selection and **already** has a party selected, leave it the same.
 - c) If the voter did not choose a party and does not currently have one selected; **OR** if they chose more than one party on the affidavit, then select **No Party Preference**.
- 3) **Language:** Select the voter's language from the dropdown.
 - a) If no language is written, the default language is **English**.
 - b) If multiple languages are selected and one of them is English, select **English**.
- 4) **Gender:** This field will automatically populate when you tab away if a **prefix** was selected. Skip it.
- 5) **Occupation:** Not used.
- 6) **Race:** Select from the dropdown list.
 - a) If the ethnicity is not listed select **Other Race**.

NVRA/Notices



The screenshot shows a form titled "NVRA / Notices" with several fields. The fields "Source:", "Delivery:", and "Type:" are highlighted with red rectangular boxes. "Source:" is a dropdown menu with the value "FAILSAFE PROVISIONAL ENVELOPE". "Delivery:" is a dropdown menu with the value "PROVISIONAL BALLOT". "Type:" is a dropdown menu with the value "PROVISIONAL BALLOT". There is also a "Reg By:" dropdown menu, a checkbox for "By Mail", and a "Notify State" button. At the bottom, there is a "8D2 Date Returned:" field with a date picker and a "Notify State" button.

- 1) **Source:** Select **Other** from the dropdown.

- a) Use **Failsafe Provisional Envelope** unless it came from another county.
- b) If this envelope came from another county use **Other County Registrar**.
- 2) **Delivery:** Choose **Provisional Ballot** from the dropdown.
- 3) **Type:** Select **Provisional Ballot** from the dropdown.
- 4) **Reg By:** Not Used.
- 5) **By Mail:** Not Used.
- 6) **Notify State:** If the voter fills out the **Prior Registration** section and listed registration in a different state, then click on the **Notify State** button. Use the information in the **Prior Registration** section to fill out the **Notify State** information.

Previous State and Residence Information

State:

Name:

Street:

City/State/Zip:

Comments:

Ok

- a) **State:** Select from the dropdown.
- b) **Name:** Enter the name as written.
- c) **Street:** Enter the Street information from the prior registration.
- d) **City:** Enter the **City, State, and Zip-Code**.
- e) **Comments:** Not used.

Contact Info

Contact Info

Phone 1: (000) ___-___ ext. ___

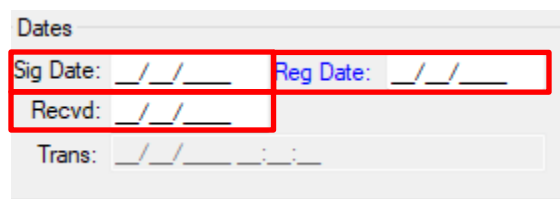
Ph 2/Fax: (000) ___-___ ext. ___

EMail:

All Contact Info

- 1) **Phone 1:** Enter the phone number.
- 2) **Ph 2/Fax:** Enter any additional phone number in field 2.
- 3) **Email:** Enter the e-mail address.

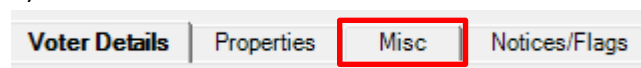
Dates



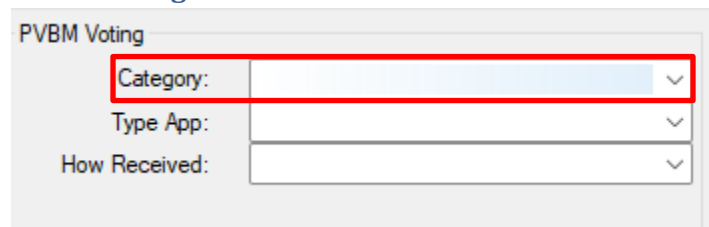
- 1) **Sig Date:** Use the date envelope was signed, sometimes referred to as the “**Execution Date.**”
- 2) **Reg Date:** Use the date of the election.
- 3) **Recvd:** Use the date of the election.

Misc Tab

- 1) Select the **Misc** tab.



PVBM Voting



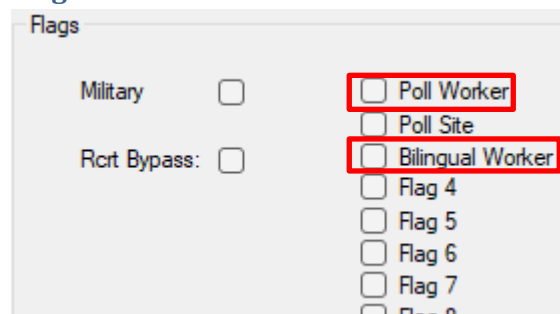
- 1) **Category:** If the voter indicated that they want to receive a **Vote-By-Mail** ballot, select **Permanent Absentee** from the drop down. If they wrote nothing, then skip this field.
- 2) Press tab until the window switches back to the **Voter Details** tab.
- 3) Go to the **Notices/Flags** tab.

Notices/Flags Tab

- 1) Select the **Notices/Flags** tab.



Flags



- 1) If the voter indicated that they are interested in being a poll worker, check the **Poll Worker** box.

- 2) If they indicated they wanted to be a poll worker **and** indicated that they speak a language other than **English** check the **Bilingual Worker** box.

Review

- 1) At this point all of the registration should be keyed. Go over all parts to confirm that everything is keyed correctly.
- 2) After verifying all the information from the above step, confirm that the **Affidavit Number** is entered correctly.
- 3) Confirm that the residence address has a **House Number, Street Name, City, and Zip-Code.**

NOTE: When an address does not automatically generate a precinct (for example in a fatal record) it will not automatically fill in the **City** field. Enter it manually in this situation.

- 4) If everything is correct, press the **OK** button to create and save the record.

Special Cases

This section will explain how to pend a voter, and what to do if a duplicate voter pops up.

Pending an Address

- 1) The “Pick a Street to Use” window might appear after typing residence information. Do not select a street, and click the **Cancel** button in the bottom right corner.

Pick a street to use

#	STATUS	PRE	STREET NAME	TYPE	POST	S	FROM	TO	ZIP/CIT
1	A	N	Fake	St		E	100	200	
2	A	N	Fake	St		O	101	199	
3	A	N	Fake	St		E	230	250	
4	A	N	Fake	St		E	300	300	

Street Range Pend Voter Ok **Cancel**

- 2) Does the residence address appear to be a PO Box or SVL Box?
 - a) If yes, then notify your lead and await their direction as this is now a provisional envelope and no longer a CVR.
- 3) If the address does not appear to be a PO Box or SVL Box, but it still does not precinct, check to see if there may have been obvious spelling errors in the name.
 - a) Open the **Find Street** window by clicking on the image of a street on the DIMS main menu.



- b) In the **Find Street** window in the **Name** field enter a portion of the name that you think is accurate and use wildcards to represent any portions where information may be missing or difficult to interpret.

Find Street

By Name | By Precinct | By City/Zip | By ID

Enter full or partial Name

Name: House From: **Locate Street Name**

City: House To:

Use Alias Table

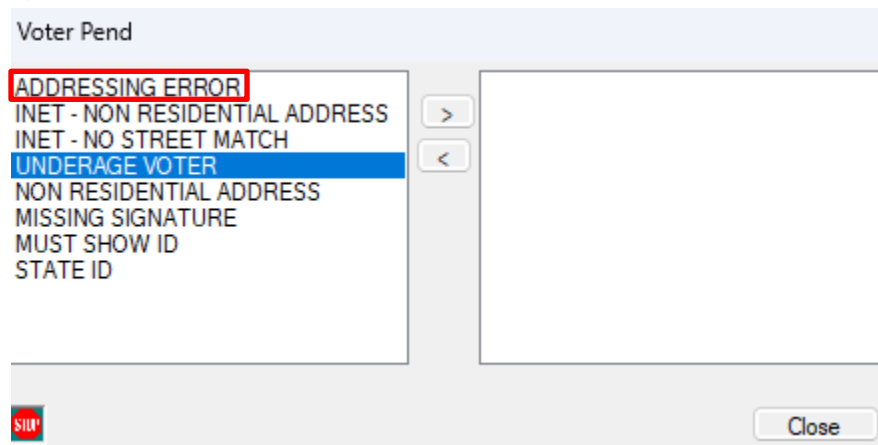
- c) In the **City** field enter the first 3 letters of the city name followed by a wildcard.
- d) Press **Locate Street Name**.

NOTE: You may repeat this a few times, changing the portion of the street you’ve entered if you think there may be other ways to spell the street. The find street tool will list some streets as they are in DIMS so it can help with street names that may have been misspelled or difficult to read.

- 4) If the street name appears to be misspelled based on the streets that appear, change the street name in the record and tab through the zip code field to check if a precinct appears now.

NOTE: If either name could be a valid street name, then don't correct it. For example, Big Tree St and Fig Tree St are both possible names, so do not change from one to another unless that is what the voter wrote on the registration.

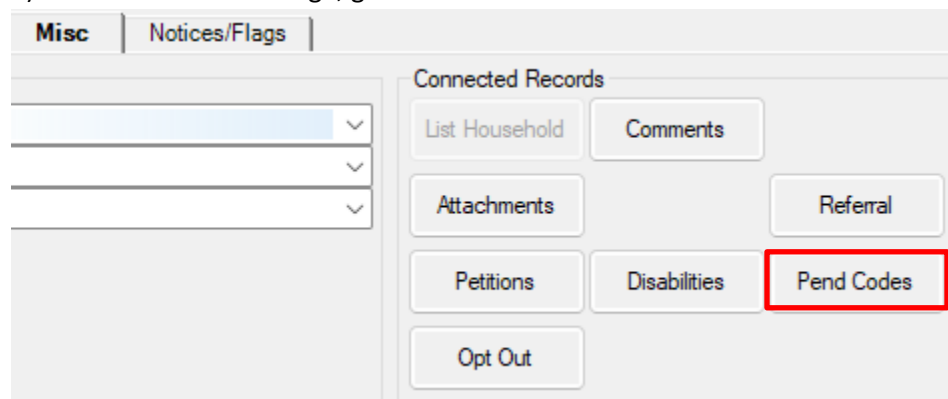
- i) If the address precincts, return to the part of the procedure you were working on before.
 - ii) If it does not precinct, then proceed to the following steps.
- b) Close the “**Pick a Street to Use**” box if it appears.
- 5) Go to the **Miscellaneous** tab in the voter's record.



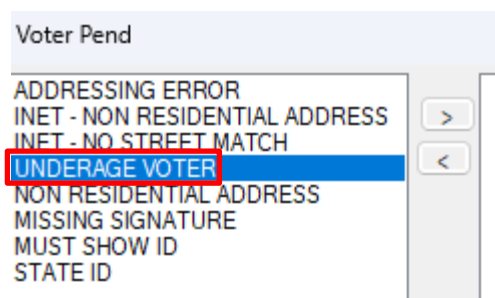
- 6) Click the **Pend Codes** button. This will open the **Voter Pend** menu.
- 7) Double-click on **Addressing Error** to select and add it to the right side.
- 8) Close the **Voter Pend** menu.
- 9) Set the voter's **Status** to **Fatal Pending**.
- 10) If you matched the record with a duplicate, set the **Reason** to **F-Reregistered Fatal** and if not, set the voter's **Reason Code** to **F-New Registration Fatal**.
- 11) Continue keying the affidavit from whichever point you were at before coming to this section of the procedure.

Pending an Underage Voter

- 1) Confirm that the voter will be/was under the age of 18 on election day.
- 2) If the voter is underage, go to the **Miscellaneous** tab in the voter's record.



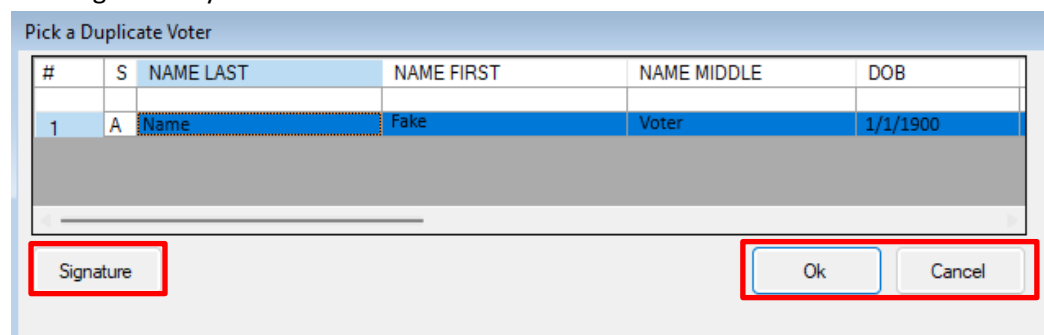
- 3) Click the **Pend Codes** button. This will open the **Voter Pend** menu.
- 4) Double-click on **Underaged Voter** to select it and add it to the right side.



- 5) Close the **Voter Pend** menu.
- 6) In the **Voter Details**, select the **VC-Underage** reason code.
- 7) Continue keying the affidavit from whichever point you were at before coming to this section of the procedure.

Duplicate Voter

If the **Pick a Duplicate Voter** window appears, follow the instructions in this section. In the duplicate voter window, there will be 1 or more rows of voter records. Each row is an individual record, and to see their signatures you will need to click on them.



- 1) Compare the information in each field to the information on the envelope.
 - a) When comparing information focus on fields with unique identifying information
 - i) Ex: Driver's license number, affidavit number, name, SSN, address.
 - ii) **DO NOT** rely on fields such as birthplace, party, race, etc.
 - b) If you want to compare signatures, click **once** on the line you want then click on the **Signature** button to pull up the voter's signatures.
- 2) If it is unclear whether the records match, ask a lead for assistance.
 - a) If the voter's **driver's license** differs between their prior registration and the current CVR, ask your lead to verify the information.
- 3) If the voter does not match, then select the next voter and compare them in the same manner. Repeat this until there are either no more voters or you find a voter that matches.
- 4) If you find no matches, then click the **Cancel** button on the **Pick a Dup** window and return to keying the affidavit as normal from the place you left off and return to wherever you were in this procedure.
- 5) If there is a match, click on that voter's line in the **Pick a Dup** window and click on the **Ok** button. This will close the **Pick a Dup** window and populate many of the fields with information from the voter's record.

- 6) Write down the **Voter ID** on the back of the CVR in the **Voter ID** box if it doesn't have one already.
- 7) Verify whether or not we need to key the CVR by checking the below information
 - a) Move to the **Properties** tab and check if the **Reg Date** is **after** the **15-day close**.
 - i) If it is **after the 15-Day close** then on the **Voter Details** tab check if the **Residence Address** in the record matches the one on the CVR envelope. Otherwise move to **step ii)** below.
 - (1) If they **are the same** then:
 - (a) Press the **cancel** button in the record to clear all of the information and place this CVR in your completed stack. The duplicate registration will count for their CVR.
 - (b) Start over with your next CVR envelope from the beginning.
 - (2) If they **do not** match then proceed to step 8) below.
 - ii) If it is **before** the 15-Day Close, proceed to the next step.
- 8) Overwrite any information that auto-filled with the newer information on the CVR.
- 9) If there are fields with information in the record, but there's no information on the CVR **usually** you will leave the previous information in the record.
 - a) For example: birthplace, race, language, license, SSN, etc.
- 10) If the voter **previously** had a mailing address, but on the CVR they do not have one, you **will** remove the prior mailing address from the record.

Pulling A CVR

Sometimes a CVR envelope will not meet the qualifications to be a CVR and in these situations you will need to "pull" it. This just means you will remove it from the stack of registrations it was with and place it with the provisionals.

- 1) Confirm whatever aspect of the aspect of the envelope prevents it from being a registration using the below criteria.
 - a) No **signature** on the form.
 - b) No **birth date** on the form.
 - c) No **name** on the form.
 - i) Check the "Prior Registration Information" section as well
 - d) No **residence address** on the form.
 - e) If the Voter's Birth Date indicates that the voter is **under the age of 16**
 - f) If there is a **PO Box or an SVL Box in the Residence Address** area on the affidavit.
 - g) If the residence address is **Out of County**. Check your list of Cities if you are unsure.
 - h) If the 'Yes' box is **not** checked for citizenship.
- 2) If **at least one** criteria fits, and you've entered any of the information from the envelope into the **New Voter** window, press the cancel button to reset the window and clear the information.
- 3) Separate this envelope from its stack and inform your lead of the criteria that prevent this envelope from being a CVR.
 - a) If you've already keyed the information and pressed **OK**, inform your lead of this as well.
- 4) They should take the envelope, if they do not, request further direction for this envelope.
- 5) Once the envelope is handled and you are ready to move on to the next envelope, return to the start of the procedure and start again.

Authorization

Document Owner: Voter Records	Initiation Date: 12/05/2023
Version Number: 2.0, Original Document	Date: 04/16/2026
Version Written By: San Bernardino County	