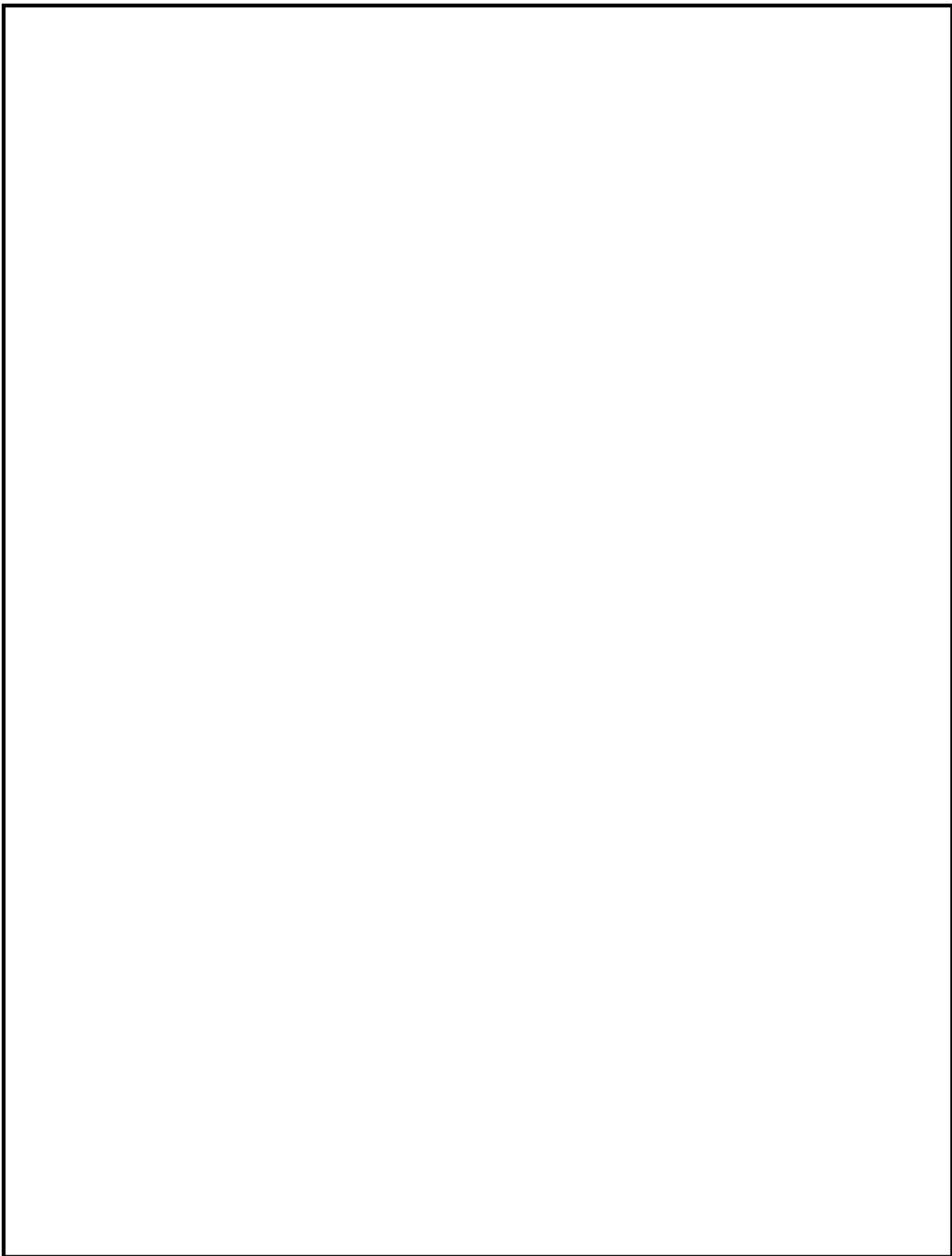


**Chapter 1**

**Voter Registration**



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## Overview

### Voter Qualifications

To qualify to register to vote, a person must be an eligible elector. An eligible elector must:

- Be a citizen of the United States,
- Be a resident of Iowa, and
- Be at least 18 years old.

An eligible elector may not:

- Be a convicted felon (unless voting rights have been restored by the president or governor),
- Be currently adjudged incompetent to vote by a court, and
- Claim the right to vote in any other place.

[§48A.5(1), 48A.5(2), 48A.6]

### Not Yet 18

A person who is 17 ½ years old may register to vote. The person's registration will not be effective until the person reaches 18 years old.

Voters must be sent an acknowledgment within seven business days after receiving their registration forms. This may be a voter registration card with the registration effective date as the voter's 18th birthday or a letter informing the voter their form was received and their registration will not be effective until their 18th birthday. The notice must include the voter's precinct and polling place information.

If the voter's 18<sup>th</sup> birthday is after the pre-registration deadline for an upcoming election, the voter's "County Registration" date must be the day after the election unless the voter appears in person and completes the election day registration requirements.

[§48A.5(2)(c), 48A.26(9), IAC 821—2.12(4)]

If you receive registration forms from persons who are not 17 ½, send them a notice explaining their registration cannot be processed because they are not 17 ½. The notice should explain that they can register to vote when they are 17 ½. Include a new voter registration form with the notice. A sample notice is available in the Election Forms Library.

See the "What to do If" section for I-VOTERS instructions on processing registrations for voters who are not yet 18.

## **Residency**

Generally, a voter's residence for voter registration purposes is where the voter claims it to be, as long as the voter does not claim any other residence for voter registration.

A voter's residence is the voter's home or dwelling (whatever place the voter considers to be "home"). A business or any other non-residential property cannot be used as a residential address for voter registration unless that place is truly a primary, nighttime residence for that registrant.

There is no restriction on how long one has to live somewhere before it can become a residence for voting purposes in Iowa.

Residency is not lost by going to another state or precinct temporarily. If a person moves to another state and missed the voter registration deadline in that state for a particular election, the person may continue to be registered in Iowa for that election.

[§48A.5, 48A.5A]

## **College Students**

College students have the option of registering to vote at their hometown residence or at their residence where they are attending college. They can only register to vote in one location.

[§48A.5(2)(d), 48A.5A(5)]

## **Homeless Persons**

The residence of a homeless person is the place where the person usually sleeps. The person must describe the location on the voter registration form so the registrar can determine in which precinct the person resides.

[§48A.5(2)(b), 48A.5A]

## **Voter Registration Applications**

There are three acceptable forms which may be used for voter registration.

1. Official Iowa voter registration form

This form is approved by the voter registration commission. Previously approved versions of the Iowa voter registration form may be accepted as long as they contain all the currently required information. The required fields are set forth in *Iowa Code* §48A.11(8). Only the most recent version of the form may be distributed by auditors' offices and the SOS.

[§48A.11]

2. Federal mail-in voter registration form

Acceptance of this form is mandated by the National Voter Registration Act (NVRA).

[§48A.12, IAC 821—2.3]

3. Federal postcard application (FPCA)

This can be used by military and overseas (UOCAVA) citizens. See the "Voter Registration and UOCAVA Voters" section for more information.

[§53.38]

## **Where to Register to Vote**

1. By mail (sent to the auditor or SOS) [§48A.8]
2. Auditor's office or at satellite absentee voting stations [§48A.17]
3. DOT offices or treasurers' offices that issue driver's licenses [§48A.18]
4. Voter registration agencies mandated by the National Voter Registration Act (NVRA) [§48A.19]

See the NVRA section for more information.

5. High schools, colleges, universities, trade and technical schools
  - Every high school (public or private) must offer every student who is 17 ½ or older the chance to register to vote at least twice a year.
  - Every state-funded college, university, trade, or technical school, or postsecondary school of any kind must offer each student the right to register to vote once each year. [§48A.23]

Voter registration forms may also be distributed and collected at voter registration drives (both sponsored and not sponsored by election offices), political party offices, naturalization ceremonies, and the state fair and county fairs. The SOS offers forms at the cost of production for organizations conducting voter registration drives.

[§48A.22, IAC 821—2.7]

Groups may pay people to help others register to vote. Iowa law prohibits paying someone based on the number of registration forms or political party affiliations listed on collected forms. Payment can be made only for a person's time. The Democratic and Republican parties are exempt from this requirement.

[§48A.25]

## **Pre-Registration Deadlines**

Voters who want their names to appear on the election registers on election day should pre-register to vote by 5 p.m.:

- 10 days before general elections
- 11 days before primary, city, school, and all other special elections

[§48A.9(1)]

## **Worry-Free Postmark**

Any voter registration form that is postmarked no later than 15 days before election day is considered on time even if it is received after the voter pre-registration deadline.

[§48A.9(3)]

## **Military Discharges**

Voter pre-registration deadlines do not apply to a person who has been discharged from military services within 30 days of an election. The person must show a copy of his or her discharge papers to the auditor before election day or a PEO on election day. The person will be allowed to vote as long as he or she completes a voter registration form. A voter in this situation is not required to, but can, use EDR procedures.

[§48A.5(6)]

## **Electronically Submitted Forms**

### **New Registrants**

Faxed or emailed voter registration forms for new registrants cannot be accepted. Contact the voter and ask the voter to send the original document.

[§48A.13]

**Exception:** UOCAVA voters may submit their FPCA electronically.

[IAC 721—21.320(2)(d), 821—2.8]

See the “Voter Registration and UOCAVA Voters” section for more information.

### **Voters Already Registered in County**

Voters who are registered in your county may submit an update to their registration electronically. The notice of update must still be signed.

[§48A.27(2)(a)(1)]

## **Election Official Oath**

Anyone who performs voter registration duties must take an oath before engaging in any official duties. The election official/clerk oath is available in the Election Forms Library.

[§48A.4]

## **Retention of Voter Registration Records**

All records of a person's registration may be destroyed 22 months after the next general election following the cancellation of the person's voter registration.

[§48A.32]

"Incomplete" voter records may be cancelled and destroyed 22 months after the next general election following their receipt.

[IAC 821—2.8(5)]

For example, if John Citizen's registration is cancelled on June 2, 2009, you would need to wait 22 months after the 2010 general election to destroy records of his voter registration. His records could be destroyed on September 3, 2012, or later.

Instead of destroying the records, the auditor can choose to donate them to a historical society as long as all confidential information (driver's license and/or Social Security numbers and the name of the agency where a form was filled out) has been removed.

[§48A.32]

## **Scanned Documents**

Voter registration documents may be scanned and stored as electronic documents. If stored electronically, the original paper documents may be destroyed, but the electronic documents must be kept for the prescribed retention period.

[§48A.32, 48A.35(2)]

## Voter Registration Agencies Mandated by NVRA

### Overview

Iowa law and the National Voter Registration Act (NVRA) mandate that certain state agencies provide voter registration forms to the public. These agencies include:

- All state offices that have direct client contact and provide applications for public assistance,
- All offices that provide state-funded programs for people with disabilities,

If the program provides services in its clients' homes, then voter registration opportunities must be offered in the clients' homes.

- U.S. armed forces recruiting offices, and
- Auditors' offices.

Any member of the public applying for services at the auditor's office (liquor, cigarette, fireworks, permits, etc.) must be offered the chance to register to vote.

[§48A.19, IAC 721—23]

Voter registration forms used by these agencies differ from the standard official Iowa voter registration form. They must provide a space for the client to indicate whether the client wishes to register to vote or whether the client declines to register. The form also must indicate that there will be no negative consequences in services or aid provided to the client if the client chooses to register or declines to register.

[IAC 721—23.3, 23.4]

These forms must also include an agency code indicating the type of agency where the voter completed the form.

[IAC 821—2.2]

Agency staff must help anyone who needs assistance in filling out the form. No employee of a voter registration agency can:

- Seek to influence an applicant's political preference or party registration,
- Display a political preference or party affiliation,
- Make any statement to an applicant or take any action which has the purpose or effect of discouraging the applicant from registering to vote,
- Make any statement to an applicant or take any action which has the purpose or effect of leading the applicant to believe that a decision to register or not to register to vote has any bearing on the availability of services or benefits, and
- Reveal the name of the agency where an individual completed a voter registration form.

[§48A.20, 48A.34]

### **Transmission of Forms**

If the agency uses paper forms, the forms must be sent to the appropriate auditor's office no later than the Friday of the week in which the document was received by the agency. If any agency is open on one of the Saturdays before a primary or general election that is the last day to register to vote, the forms must be sent at the close of business that day.

If the agency has a paperless system (similar to the DOT's), registrations must be sent on a daily basis. Currently, there are no paperless systems used by voter registration agencies in Iowa.

[IAC 821—8.1, 821—8.5]

### **Agency Acquiring Forms**

Agencies must order voter registration forms through the SOS.

[IAC 821—2.5]

## **Voter Registration and UOCAVA Voters**

### **Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA)**

The Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA) is a federal law that makes it easier for members of the armed forces and certain overseas U.S. citizens to register to vote and cast absentee ballots.

UOCAVA voters include:

1. Members of the armed forces on active duty and their spouses and dependents ,
2. Members of the merchant marine and their spouses and dependents,
3. Civilian employees of the U.S. serving outside the territorial limits of the U.S. and their spouses and dependents who live with them,
4. Members of religious or welfare agencies assisting members of the armed forces who are officially attached to and serving with the armed forces and their spouses and dependents, and
5. U.S. citizens who live outside the territorial limits of the U.S.\*

\*Citizens may register and vote in Iowa if they or their parents were eligible electors of Iowa just before leaving the U.S. This includes citizens who were not old enough to register to vote at the time they left the country.

[§48A.5(4), 48A.5(5), 53.37]

If a U.S. citizen is also a citizen of another country and votes in that country's elections, it does not affect that person's ability to vote in U.S. elections as long as the person does not claim the right to vote anywhere else in the U.S.

[§48A.5(4)(b)]

### **Registering to Vote**

UOCAVA voters may register to vote any of the following ways:

- Completing an official Iowa voter registration form or federal mail-in voter registration form
- Completing a federal postcard application (FPCA)

An FPCA is used by UOCAVA voters only and serves as both a voter registration form and an absentee ballot request form. See the Absentee Voting chapter for more information.

- Completing the declaration of eligibility on the federal write-in absentee ballot (FWAB)

See the Absentee Voting chapter for more information.

- Completing the affidavit envelope on an absentee ballot

[§53.38, 53.53(2)]

UOCAVA voters may fax or email their FPCA. The voter's signed affidavit from the voted ballot will provide the voter's original signature for the voter registration record. If a signed affidavit from a voted ballot is not returned, the voter's status must be made "Incomplete" with the status reason "Registration Incomplete" and the "No signature" box checked after the election is posted and closed.

[IAC 721—21.320(2)(d), 821—2.8]

### **Original Signature from UOCAVA Registrants**

The document containing the physical signature of the UOCAVA voter (i.e. paper copy of the FPCA, FWAB declaration of eligibility page, or absentee affidavit envelope) must be kept and stored as the original voter registration document for the voter.

### **Retention of UOCAVA Voter Registration Documents**

All records of a person's registration may be destroyed 22 months after the next general election following the cancellation of the person's voter registration.

[§48A.32]

### **Pre-Registration Deadlines and ID Verification**

Voter pre-registration deadlines do not apply to UOCAVA voters.

[§53.38]

UOCAVA voters are also exempt from ID verification. UOCAVA voters should not be placed on "Pending" status for indicating they do not have an ID or for failure to verify an ID. If a UOCAVA voter did not provide an ID number on the FPCA and also on the signed affidavit with the voted ballot, the voter must be made "Incomplete" with the status reason "Registration Incomplete" after the election is posted and closed.

[§48A.25A(3), 53.38]

### **Processing Registrations in I-VOTERS**

Follow the same procedures as domestic voters for entering or updating registration information. See the "I-VOTERS Instructions" section for more information on entering mailing address information.

## **Election Day Registration**

### **Overview**

After the pre-registration deadline, any person who is not already registered in the county may register by proving identity and residency.

If a voter wants to register after the pre-registration deadline in the auditor's office or at a satellite voting station and vote in the upcoming election, the voter must also vote an absentee ballot at the same time.

If the voter wants to vote on election day, the voter must go to the correct precinct and complete the election day registration process.

[§48A.7A(1)(a), 48A.7A(3), IAC 721—21.302]

### **ID Number Verification Not Required**

The ID number provided by voters using election day registration procedures does not need to be verified. An EDR voter should never be placed on "Pending" status because the voter showed proof of identity at the time of registration.

[§48A.25A(1)(b)]

### **Proof of Identity**

The best form of identification is a valid Iowa driver's license with the voter's current address printed on it. The voter may also provide one of the following as proof of identity:

- Iowa non-driver identification card,
- Out-of-state driver's license or non-driver's identification card,
- U.S. passport,
- U.S. military ID,
- Employer-issued ID, or
- Student ID from an Iowa high school or college.

All forms of photo ID must be current, valid, and contain an expiration date. The expiration date must be the day the voter is registering or later or list "None" as the expiration date.

Temporary licenses or IDs issued by the Iowa Department of Transportation must be accepted as proof of identity and/or residency while the temporary ID is valid. The temporary ID is valid for 30 days, and each one will have an expiration date printed on it.

PEOs must inspect the photo ID to verify the photograph shows the voter and to verify the voter's name is listed. If the photo ID is also used to prove residency, the PEOs must verify the address listed on the ID is the same address the voter provided.

[§48A.7A(1)(b)(1), IAC 721—21.3(2), 21.7(1)]

## **Proof of Residency**

If the ID presented as proof of identity does not contain the person's current address, any of the following may be presented as proof of residency as long as it contains the voter's name and current address:

- Residential lease,
- Property tax statement,
- Utility bill (including a cell phone bill)
- Bank statement,
- Paycheck,
- Government check, or
- Other government document (vehicle registration, tax assessment, etc.)

PEOs must inspect the proof of residence document to verify it shows the voter's name and address.

[§48A.7A(1)(b)(2), IAC 721—21.3(2)]

Documents presented must be actual documents, not documents displayed on smart phones or other technological devices.

## **Attestation**

If a voter does not have proof of identity and residence, a registered voter in the precinct can attest to the identity and residence of the voter as long as the attester has not attested for anyone else and was not attested for him or herself.

The voter being attested for must fill out a voter registration form and an oath swearing that the information is true.

The attester must also fill out an oath swearing the information the voter is providing is true.

Both oaths and a voter registration form are available in the Election Forms Library.

[§48A.7A(1)(c)]

Keep a log of people who have attested for EDR absentee voters at your office and at satellite locations. Copies of the list of attestors should be available at your office, satellites, and at each polling place on election day. A sample list of EDR attestors log is available in the Election Forms Library.

### **Notice to Election Day Registrants**

In precincts where an electronic poll book program is not used, PEOs must hand each election day registrant a “Notice to Election Day Registrants” and ask the registrant to read the information.

[§721—21.7(4)]

The notice informs registrants that if they have ever been convicted of a felony and have not had their right to vote restored, they are committing a Class D felony if they proceed to register and vote. The notice also details what options the voter has if the voter is not 100% sure of the status of the voter’s voting rights and also lists the other requirements to be a registered voter.

Precincts that use an electronic poll book program that has been properly uploaded with the statewide felon data are not required to use this notice.

The “Notice to Election Day Registrants” is available in the Election Forms Library.

### **EDR Registrant Follow Up**

All EDR registrants must be sent a nonforwardable voter registration card. If the card is returned as undeliverable, do not make the voter “Inactive” (unlike regular registrants who would be made “Inactive” at this point).

Send the forwardable “EDR Voter Follow Up Notice” available in the Election Forms Library.

If the voter does not respond to that notice within 14 days or the notice is also returned as undeliverable, then make the voter’s record “Inactive.” In addition, notify the SOS and the county attorney. See §48A.26A for more information.

[§48A.26A]

### **Election Day Registration at Vote Centers**

Voters may use election registration procedures at any vote center at an election held for the jurisdiction in which the voters live. If using an attester, the attester must still be registered in the EDR voter’s residential precinct.

[§48A.7A(1)(c), 49.11(3)(b)(1), IAC 721—21.75(8)(b)]

## Provisional Voting and Voter Registration

### Processing Voter Registrations for Provisional Voters

On election day, if voter required to show ID pursuant to §48A.8 or an EDR voter cannot prove identity and residence and does not have anyone who can attest for him or her, the voter may vote a provisional ballot and bring in proof of identity and residency at a later time. This must be done before the ASVP board meets to consider provisional ballots.

[§49.81, 50.20, IAC 721—21.3(4)]

If a provisional voter brings in required identification by the deadline to do so and is not registered to vote in your county, you must create a voter registration record in I-VOTERS using the information provided on the voter registration form. The “County Registration” date and “Vote Eligible” date should be the day of the election. Process the voter registration using the I-VOTERS instructions “EDRs Received on Election Day at the Polls.”

If a provisional voter does not bring in required identification but otherwise meets the requirements for voter registration and the voter completed a voter registration form when voting a provisional ballot, you must create a voter registration record or update the voter’s registration record in I-VOTERS using the information provided on the voter registration form. The “County Registration” date and “Vote Eligible” date should be the day after the election.

[IAC 821—2.12(1)]

**Exception:** A voter registration record cannot be created if the voter did not complete a voter registration form.

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## Updating Voter Registration Records

### Voter-Initiated Updates

Voters already registered to vote in the county may update their registration records by submitting the following items at any time, including the period when pre-registration is closed before any election:

- Official Iowa voter registration form or federal mail-in voter registration form,

**Important Note:** If the voter has moved within the precinct, the voter may submit updates at the polls on election day by submitting a registration form to the precinct officials at the precinct of the voter's current residence. The voter is not required to show identification.

If the voter moved to a new precinct within the same county, the voter must show identification listed in §48A.8 before updating their address at the polls on election day.

- Signed, written notice,

The notice may be received in person, by mail, fax or email. If received electronically, the notice still must be signed (i.e. contain an image of the voter's written signature).

- Absentee ballot request,

The "I have moved" box does not need to be checked to process a within county move using the absentee ballot request form.

**Important Note:** Do not update the voter's mailing address on the voter's registration record using the voter's absentee ballot mailing address.

- A change of address given to the DOT or a county treasurer who issues driver's licenses,
- A change of address notice for voter registration given to any voter registration agency, or
- A federal postcard application (FPCA), a declaration of eligibility on a federal write-in absentee ballot (FWAB), or the affidavit envelope for a UOCAVA voter's absentee ballot

[§39.3(17), 48A.2(5), 48A.18(2), 48A.27(2)(a), 53.2(7)]

Review the registration form for changes of information. Update the voter's record in I-VOTERS to indicate any other changes. See the "Processing Voter Registrations" section for I-VOTERS instructions on updating records.

**Important Note:** If the registration form changes nothing and is a true duplicate of the information in the voter's record, mark "**Duplicate Registration Received**" under the "**Misc**" tab in the voter's record in I-VOTERS.

If the voter did not mark a party affiliation on the registration form, do not update the party affiliation in the voter's record.

[§48A.27(2)(b)]

Registration	Misc Info	Custom
Secondary Lang		Last Verified 04/22/2011
Special Assistance		
Ballot Style	NO APPLICABLE ELECTION	
State Reg Date	09/09/2002	Last Upd. Date 11/18/2011
Source of Update	Administrative	
Audit Comment	Administrative Attached Image Cancelled Registration Clerical Error Correction Duplicate Registration Received New Registration Registration Updated	
Comments	DOT AU	

## **Non-Voter-Initiated Updates**

Update a voter's registration record if one of the following events occurs, even if you do not receive a notification from the voter:

- City annexation,

The city clerk must provide the auditor with a detailed map showing the annexation and designated wards (if the city has wards).

In I-VOTERS, update the "Address Library" records affected by the annexation. Determine which precinct and split to assign the addresses. This may require the creation of a new split. See the "I-VOTERS Instructions" section for information on the "Address Library."

- A change by a city or county of the official street name, house number, or building number,
- Incorporation or discontinuance of a city, or
- Change of rural route designation.

[§48A.27(3)]

## **When ID is Required**

### **Before Pre-Registration Deadline**

Voters updating their registration records before the pre-registration deadline do not need to show ID.

### **After Pre-Registration Deadline and Before Election Day**

If a voter who is already registered in your county is updating the voter's address in your office before election day, the voter is not required to show ID.

[§48A.27(2)]

### **On Election Day**

If a voter who is already registered in your county is moving to a new precinct within the county, the voter must complete a new voter registration form and show one of the forms of ID listed in §48A.8.

[§49.77(3)(a)]

Documents presented must be actual documents, not documents displayed on smart phones or other technological devices.

## Challenges to Voter Registration

### Overview

Any registered voter can challenge the registration of another voter in the same county. The challenger must provide a written statement to the auditor, claiming that the person:

- Is not a U.S. citizen,
  - Is not at least 17 ½ years old,
  - Is not a resident at the address where registered to vote,
  - Has falsified information on the registration form,
  - Has been convicted of a felony (and has not received a restoration of rights), or
  - Has been adjudged incompetent to vote (and no ruling to the contrary has been issued)
- [§48A.14(1)]

Challenges must be made on an individual basis.

[§48A.14(2)]

A challenger's statement must be completed for each challenged registrant. Challenges must include the statement contained in §48A.14(3) where the challenger acknowledges that he or she knows it is an aggravated misdemeanor to make a false challenge.

[§48A.14(3)]

A sample challenger's statement is available in the Election Forms Library.

Challenges to EDR registrants must be made in the same manner as challenges on election day to voters at a polling place. See the Election Day chapter for more information.

[§48A.14(4), 49.79]

### Deadline

Challenges can be made at any time, except that no challenges may be made less than 70 days before any pending election unless the challenge is for a newly received voter registration form or change of information. In that case, the challenge must be made within 20 days of the auditor's receipt of the new form or change of information or the challenge will be set aside until after the pending election.

[§48A.14(4)]

### Withdrawing a Challenge

Challengers may withdraw the challenge at any time. To withdraw, a challenger must give the auditor a written statement.

[§48A.14(5)]

## **Receiving Challenges**

When a challenge to a voter registration is received, make sure the challenge meets all the requirements set out in §48A.14.

- If the challenge is not valid, notify the challenger and explain why the challenge is not valid. No further action is necessary.
- If the challenge is valid, a hearing must be held between 20 and 30 days after the challenge is received.

Within five working days after receiving a valid challenge, notify the challenger and the challenged registrant by forwardable first-class mail of the date, time, and place that the hearing will be held.

The challenged registrant has the option to appear in person at the hearing or give evidence to the auditor before the time of the hearing. The hearing may also be rescheduled if the challenged registrant wants to appear in person but is unable to come on the day of the scheduled hearing.

[§48A.15]

## **Challenge Hearing**

At the hearing, the challenger and the challenged registrant (or their representatives) may present evidence.

The auditor must review the evidence and either reject or accept the challenge based on the evidence presented. If the challenge is upheld, the auditor will immediately cancel the registration of the person in question and notify the challenged registrant of the cancellation by first-class, forwardable mail.

The auditor's decision may be appealed by either party to the district court.

[§48A.16]

## Transaction Sources, Statuses, and Status Reasons

Each voter registration record is assigned a “Transaction Source” and “Status.” Some records are also assigned a “Status Reason.”

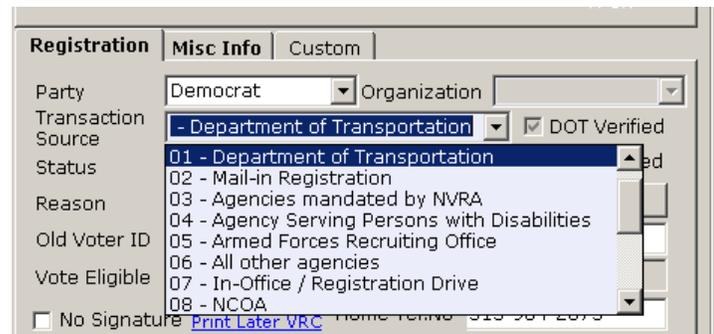
### Transaction Sources

A “Transaction Source” is used to designate the source of received voter registration forms or updates to registration records.

**Important Note:** Update the “Transaction Source” any time a new voter registration form is received or a change is made to the voter’s record, including assigning the voter to “Active” status if the voter was previously assigned a different status.

#### **01 – Department of Transportation**

Use this transaction source for all DOT registrations. I-VOTERS will default to this source automatically when processing DOT registrations. See the “Processing DOT Registrations” section.



The screenshot shows a software window with tabs for "Registration", "Misc Info", and "Custom". The "Registration" tab is active. It contains several fields: "Party" (Democrat), "Organization" (empty), "Transaction Source" (a dropdown menu currently open showing a list of options), and "Status" (01 - Department of Transportation). A checkbox labeled "DOT Verified" is checked. Below these are fields for "Reason", "Old Voter ID", and "Vote Eligible". At the bottom, there is a checkbox for "No Signature" and a link for "Print Later VRC".

#### **02 – Mail-In Registration**

Use this for all registration forms received by mail, forms received from an organization that solicits forms (i.e. political parties, community orgs, etc.), and forms that are not delivered directly by the voter to the auditor, auditor’s staff, the SOS, or PEOs.

Do not use this for registrations sent by voter registration agencies, naturalization ceremonies, or voter registration drives where SOS personnel are present.

#### **03 – Agencies Mandated by NVRA**

Code 03 will be at the bottom left corner of registration forms filled out at these agencies.

#### **04 – Agency Serving Persons with Disabilities**

Code 04 will be at the bottom of registration forms filled out at these agencies.

#### **05 – Armed Forces Recruiting Office**

Code 05 will be at the bottom of registration forms filled out at these offices.

## **06 – All Other Agencies**

This source is only used for registration forms that are received as a result of the auditor's office designation as a voter registration agency (i.e. a person who is applying in person for a liquor, cigarette, or fireworks permit decided to register on the form you are required to offer that person).

**Important Note:** In all cases of agency registrations, the individual agency where the person filled out the form is confidential information and should never be disclosed to anyone. You must still differentiate between the different agencies because this information is required to be reported to the federal Election Assistance Commission.

[§48A.34]

## **07 – In-Office / Registration Drive**

Use this for all registrations received directly from the voter by the SOS, the auditor or staff, or a PEO. This source does not include registrations delivered by organizations that solicit voter registrations. Those should be entered as "02 – Mail-in Registration."

## **08 – NCOA**

Voters' records are automatically updated to this "Transaction Source" when processing NOCA records for voters that moved out of the county.

This should also be used when processing countywide cards returned by a third party or the post office.

## **09 – State Registrar of Voters**

Use this transaction source anytime you are taking action on a voter's record based on information received from the SOS. This includes notices of felony convictions and death notices received from DPH.

## **10 – Moved Out of Jurisdiction**

Use this when you are cancelling a voter's record because you received a notification from another state that a voter registered to vote there.

## **11 – Administrative Action**

This source is used for correcting clerical errors.

## **12 – Returned Mail**

Use this transaction if you are taking action based on mail returned as undeliverable by the post office. This is typically the transaction source used when changing a voter's status to "Inactive."

### **13 – Any Other Source Not Listed**

Use this source with discretion and only for transactions that do not appear to have another relevant code.

### **14 – Voter Confirmed – NCOA**

Use this to indicate that a voter has responded to an NCOA card, countywide mailing card, or No Activity card confirming the voter's address. Do not use for anything other than these confirmations.

### **15 – Election Day**

This source is only to be used for EDR voters who registered to vote and voted on election day or who used EDR procedures when casting an absentee ballot during the period after the voter pre-registration deadline. See the "Election Day Registration" section of this chapter for more information on processing EDR voters.

### **16 – Voter Confirmation**

Use this when you receive a reply from a voter who was sent a residential confirmation notice because the voter's status was changed to "Inactive." This does not include voter replies from NCOA, countywide mailing, and No Activity notices.

## **Statuses and Status Reasons**

Each voter's record is assigned a registration "Status" and a "Status Reason." No reason code is required for registrations on "Active" status.

### **Active**

All new, complete registrations must be entered with this status. This status indicates there are no problems with the voter's registration, the voter's identification number has been verified, and no notices sent to this voter have been returned as undeliverable.

The names of "Active" voters will appear in the election register.

[IAC 821—2.14(1)]

### **Inactive**

If one of the following mailings is sent and it is returned as undeliverable by the post office, the voter's status must be changed to "Inactive":

[IAC 821—2.14(2)]

- Voter registration card

[§48A.26(6)]

#### **Exceptions:**

##### Voter Registration Card Mailed to Mailing Address

If a voter registration card was mailed to a mailing address on a voter's registration record and the card is returned as undeliverable by the post office, remove the mailing address from the voter's registration record.

Mail another voter registration card to the voter's residential address. If that card is returned as undeliverable by the post office, make the voter's status "Inactive."

[IAC 821—7.2]

##### Voter Registration Card Mailed to EDR Registrant

If a voter registration card for an EDR registrant is returned undeliverable by the post office, send the voter the "Notice to Election Day Registrant" before making the voter's records "Inactive." The notice is available in the Election Forms Library.

If the EDR follow up notice is returned undeliverable or the voter does not respond to the notice within 14 days, make the voter's status "Inactive." Also notify the SOS and county attorney. See the "Election Day Registration" section of this chapter for information.

[§48A.26A]

- NCOA card

[§48A.29]

- No Activity in 4 Years card [§48A.29]
- Countywide mailing postcard for counties that do not use NCOA [§48A.29]
- Absentee ballot [IAC 821—2.14(2)]

**Exception:** Do not change a UOCAVA voter’s status to “Inactive” if the voter’s ballot is returned undeliverable. Other follow up procedures are required. See the Absentee Voting chapter for more information.

[§48A.5A(3)]

**Important Note:** Do not inactivate a record if something you mailed to a voter is returned due to lack of postage.

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“Inactive” status also includes the following:

- Voters who have been identified in the NCOA process as having moved outside the county.  
[§48A.27(4)(c)]
- Voters who are mailed an NCOA, a countywide mailing, or a No Activity notice and a third party responds to the notice indicating the voter does not live at that address anymore. This is the only time you can take action on a voter’s record based on a third party notice.  
[§48A.29(3)]
- Voters identified by county registrars during the cross state match as having more recent voter registration activity in another state.  
[IAC 721—28.3]

See the “Voter Correspondence” section of this chapter for more information on setting up automatically generated correspondence for “Inactive” voters.

The names of “Inactive” voters will appear on the election register. They will be required to show an approved form of ID listed in §48A.8 before they can cast a regular ballot. If they are unable to provide identification when voting, they must be offered a provisional ballot.

“Inactive” voters are made “Active” when they:

- Request an absentee ballot,
- Vote at an election after showing an ID from §48A.8 or use EDR procedures,
- Register to vote again, or
- Report a change of name, address, telephone number, or party affiliation.  
[§48A.37(2), IAC 821—2.14(2)]

**Exception:**

Change the voter’s status to “Pending” if an “Inactive” voter with the reason “Pending – Returned Mail/ Third Party” does one of the following:

- Submits a registration form and the voter’s ID still cannot be verified, or
- Submits absentee ballot request.

Use the previous pending “Status Reason” found in the voter’s audit log. The voter will be required to show a form of identification listed in §48A.8 to an election official before voting or at the time of casting an absentee ballot.

Absentee voters by mail must provide a copy of their identification if they have not already done so. If they do not provide identification, the ASVP board must challenge the ballot. The ASVP board can only count the ballot if ID is received.

[IAC 721—21.301(3)]

## Inactive Status Reasons

Status	I - Inactive	<input type="checkbox"/> SSA Ve
Reason		Verif
Old Voter ID	08 - NCOA	
Vote Eligible	12 - Returned Mail	
<input type="checkbox"/> No Signatu	CSM - Cross State Match	
	PRM - Pending - Returned Mail/ Third Party	
	TP - Third Party Notice	

### ▪ **08 – NCOA**

Use to indicate that a voter was made “Inactive” because post office records showed the person had an address

outside of the county. This will automatically become the reason code when processing out-of-county moves during the annual NCOA process.

[§48A.27(4), 48A.28(2), IAC 821—9]

### ▪ **12 – Returned Mail**

Use this when a voter’s status is “Inactive” because mail sent to the voter was returned as undeliverable.

**Exception:** Do not use this status reason if the voter’s status was previously “Pending.” Instead, assign the voter the “Status Reason” “PRM – Pending – Returning Mail/ Third Party Notice.”

[§48A.26(6), 48A.26A(2)]

### ▪ **CSM – Cross State Match**

Use this if you determine the voter has more recent registration activity in another state based on the cross state match list provided by the SOS.

[IAC 721—28.3(3), 28.3(4)]

### ▪ **PRM – Pending – Returned Mail/ Third Party Notice**

Use this reason if a voter was “Pending” and then one of the following occur:

- Notice of pending registration was returned as undeliverable, or
- An NCOA, countywide mailing, or No Activity confirmation card is received from a third party indicating the voter no longer lives at the address where the card was mailed.

Do not cancel a voter’s registration until a confirmation from the voter is received.

[§48A.29(3)]

### ▪ **TP – Third Party Notice**

Use this reason if an NCOA, countywide mailing, or No Activity confirmation card is received from a third party indicating the voter no longer lives at the address where the card is mailed.

[§48A.29(3)]

## Incomplete

“Incomplete” status is used for new county voters who submit registration forms that lack any of the following required information:

- Name,
- Residence address or description,
- Date of birth,
- Sex,
- ID number:
  - Iowa driver’s license number, or
  - Iowa non-driver’s ID number, or
  - The last four digits of their Social Security number.

**Important Note:** If the voter checks the box next to “None” on the voter registration form indicating the voter does not have any of the required forms of ID, assign the voter a status of “Pending” with reason “No DL or SSN.” If the voter leaves the field blank, assign the voter a status of “Incomplete” with reason “Registration Incomplete.”

- Signature.

The names of “Incomplete” voters will not appear in the election register.

“Incomplete” voters can be made “Active” only after they submit a completed registration form and their ID information is verified.

[§48A.11(8), 48A.37(2)]

See the “Voter Correspondence” section of this chapter for more information on setting up automatically generated correspondence for “Incomplete Voters.”

## Incomplete Status Reasons

- **NE – Not Eighteen**

Do not use this status reason. Voters who are not 18 but who are 17 ½

should be assigned “Active” status

with a “County Registration” date and “Vote Eligible” date of their 18<sup>th</sup> birthday. Voters who are less than 17 ½ currently cannot be entered into I-VOTERS. See the “What to Do If” section for more information.

Status	N - Incomplete	<input type="checkbox"/> SSA V
Reason	NE - Not Eighteen	Verit
Old Voter ID		
Vote Eligible	RI - Registration Incomplete	

[§48A.5(2)(c), 48A.26(9), IAC 821—2.12(4)]

- **RI – Registration Incomplete**

Use this reason code if the voter did not provide a name, gender, date of birth, or residential address on the registration form.

Use this if the voter left the ID field blank on the form and did not indicate they do not have an Iowa driver’s license or Social Security number.

Status	N - Incomplete	
Reason	RI - Registration Incomplete	
Old Voter ID	0	County Registrati
Vote Eligible		Last Voted
<input type="checkbox"/> No Signature	<a href="#">Print Later VRC</a>	Home Tel.No 5:

Also use this reason code if the voter did not sign the registration form. If they voter failed to sign the form, be sure to check the “No Signature” box when entering the voter’s information in I-VOTERS.

[§48A.11(8), 48A.37(2)]

## Pending

Use “Pending” for any new voter registering in the county whose ID information cannot be verified. The voter’s ID number, name, and date of birth (month, day, and year), must match for the voter to be assigned “Active” status.

Also use “Pending” for any voters who check the box next to “None” on the voter registration form indicating that they do not have an Iowa driver’s license, Iowa non-driver’s ID, or a Social Security number.

The names of “Pending” voters will appear on the election register. They will be required to show a form of ID listed in §48A.8 or use EDR procedures in order to cast a regular ballot. If they provide identification when voting, they must be made “Active.” If they are unable to provide identification, they must be offered a provisional ballot.

[§48A.25A(1)(a), 48A.37(2), IAC 821—2.14(3), 2.15(2), 2.15(3)]

See the “Voter Correspondence” section of this chapter for more information on setting up automatically generated correspondence for “Pending” voters.

### Pending Status Reasons

- **D – No DL or SSN**

Use this reason code for registrants who indicate they do not have an Iowa driver’s license, Iowa non-driver’s ID, or a Social Security number by checking the box next to “None” on the voter registration form.

Status	P - Pending	<input type="checkbox"/> SSA V
Reason		Verif
Old Voter ID		
Vote Eligible	D - No DL or SSN NV - Not Verified	

If the voter leaves the ID field blank on the form without any indication that the voter does not have any of the required IDs, assign the voter a status of “Incomplete” with the reason “Registration Incomplete.”

[IAC 821—2.14(3)(a)]

- **NV – Not Verified**

Use this reason code for voters whose ID numbers cannot be verified. This is the most common reason code for “Pending” status.

These voters must show or mail a copy of a form of identification listed in §48A.8 before being allowed to vote for the first time in the county. After showing or mailing identification, the voter should be made “Active.”

[IAC 821—2.14(3)(b)]

## Cancelled

Voter records must be cancelled if the voter:

- Dies,
- Is convicted of a felony,
- Is adjudged mentally incompetent to vote,
- Moves out of the county or registers to vote in another jurisdiction,
- Is challenged pursuant to §48A.14 and the challenge is upheld,
- Requests in writing to have his or her registration cancelled,
- Has been “Inactive” for the past two general elections, or
- Has been “Incomplete” for the past two general elections.

[§48A.30, 48A.37(2), IAC 721—28.4, 821—2.8(5)]

The names of cancelled voters will not appear on election registers.

Notifications must be sent to voters whose records are cancelled due to a felony conviction or adjudication of mental incompetency to vote. Notifications must also be sent to anyone whose record is being cancelled due to being on “Inactive” status during two consecutive general elections.

[§48A.30(2), IAC 721—28.4]

See the “Voter Correspondence” section of this chapter for more information on setting up automatically generated correspondence.

## Cancelled Status Reasons

- **10 – Moved out of Jurisdiction**

Use when the voter moved out of the county or registered to vote in another state.

[§48A.30(1)(b)]

- **AIV – Adjudged Incompetent to Vote**

Use when a notice from a clerk of court or the SOS is received indicating the voter was adjudged mentally incompetent to vote.

[§48A.30(1)(e)]

- **CF – Convicted Felon**

Use when notice from a clerk of court or the SOS is received indicating the voter was convicted of a felony.

[§48A.30(1)(d)]

- **CIC – Inactive to Cancelled**

Use this if cancelling the voter’s registration because the voter’s record was continuously assigned an “Inactive” status through two consecutive general election cycles.

[§48A.30(1)(f)]

- **CINC – Incomplete to Cancelled**

Use this if cancelling the voter’s registration because the voter’s record was continuously assigned “Incomplete” status for 22 months after the general election that followed receipt of the incomplete registration application. The forms the voter completed may be destroyed at that time as well.

[IAC 821—2.8(5)]

- **DEC – Deceased**

Use when a voter dies. Acceptable proof of death is:

- Notice of death from the state registrar of vital statistics forwarded by the SOS through the I-VOTERS’ DPH Search module,
- A written statement from a member of the voter’s household,
- A newspaper obituary,

The screenshot shows a software interface with several fields. The 'Status' field is set to 'C - Cancelled'. The 'Reason' field is open, showing a list of options: '10 - Moved Out of Jurisdiction' (highlighted), 'AIV - Adjudged Incompetent to Vote', 'CF - Convicted Felon', 'CIC - Inactive to Cancelled', 'CINC - Incomplete to Cancelled', 'DEC - Deceased', 'NCOA - NCOA Confirmation by voter', and 'RER - Request for Removal'. Other fields include 'Old Voter ID', 'Vote Eligible', 'Comments', and 'SSA Ve'.

- A written statement from an election official, or
- A notice from the county recorder of the county where the voter died.

[§48A.30(1)(a)]

- **NCOA – NCOA Confirmation by voter**

Do not use this reason.

- **RER – Request for Removal**

Use this reason when a voter requests cancellation of his or her voter registration. The request must be made in writing.

[§48A.30(1)(c)]

## Voter Correspondence

### Overview

An acknowledgment must be sent to a voter after a voter registration form is received or when a change of information initiated as provided in §48A.27 is made to a voter record.

[§48A.26(1)(a)]

Some required voter correspondence is generated by I-VOTERS through correspondence rule configuration and others require a form letter. Also, some correspondences must be sent by non-forwardable mail while others must be sent by forwardable mail. Review the requirements of each type of correspondence before sending them.

A “Voter Status/Reason Code Correspondence Guide” is available in the Election Forms Library.

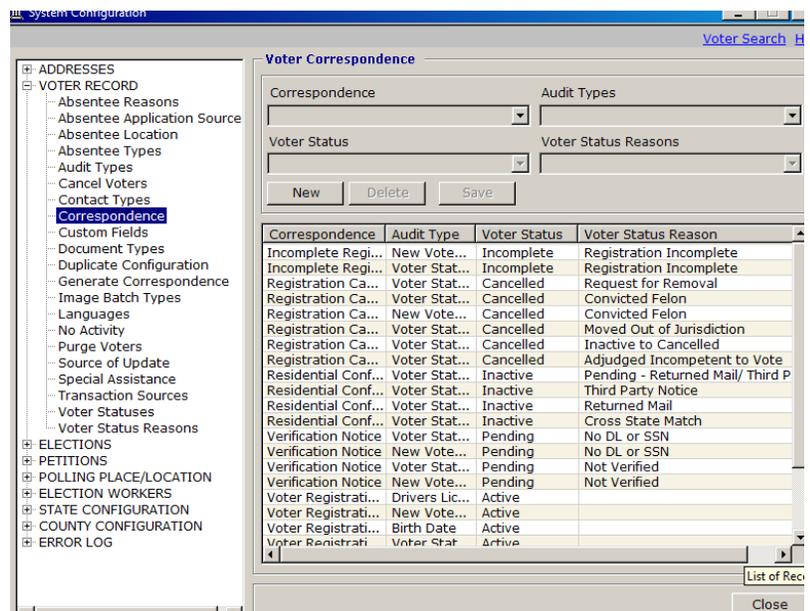
**Best Practice:** Send all types of voter correspondence on at least a weekly basis.

### I-VOTERS Correspondence Rules Configuration

Counties can configure I-VOTERS to automatically generate notices when a change is made to a voter’s record.

1. Open “**System Configuration**” from the main I-VOTERS screen.
2. On the left hand side of the screen, click on the “+” sign next to “**Voter Record**” to expand that menu.
3. Click on the word “**Correspondence**” to see your current correspondence rules.

The correspondence generated will depend on the “**Audit Type**,” “**Voter Status**” and “**Voter Status Reason**” chosen when making a change to a voter’s record.



Legally Required Correspondence Rules

<b>Correspondence</b>	<b>Audit Type</b>	<b>Voter Status</b>	<b>Voter Status Reason</b>
Voter Registration Card	Birth Date	Active	
Voter Registration Card	Voter Status	Active	
Voter Registration Card	Residential Address	Active	
Voter Registration Card	Name	Active	
Voter Registration Card	New Voter Record	Active	
Incomplete Registration Notification	Voter Status	Incomplete	Registration Incomplete
Incomplete Registration Notification	New Voter Record	Incomplete	Registration Incomplete
Registration Cancellation Notification	Voter Status	Cancelled	Inactive to Cancelled
Registration Cancellation Notification	New Voter Record	Cancelled	Convicted Felon
Registration Cancellation Notification	Voter Status	Cancelled	Convicted Felon
Registration Cancellation Notification	Voter Status	Cancelled	Adjudged Incompetent to Vote
Residential Confirmation Notice	Voter Status	Inactive	Third Party Notice
Residential Confirmation Notice	Voter Status	Inactive	Returned Mail
Residential Confirmation Notice	Voter Status	Inactive	Pending – Returned Mail/ Third Party Notice
Residential Confirmation Notice	Voter Status	Inactive	Cross State Match
Pending Registration Notification	Voter Status	Pending	No DL or SSN
Pending Registration Notification	Voter Status	Pending	Not Verified
Pending Registration Notification	New Voter Record	Pending	No DL or SSN
Pending Registration Notification	New Voter Record	Pending	Not Verified

[§48A.26, 48A.29, 48A.30, IAC 721—28.3(3), 28.3(4)]

Optional Correspondence Rules

<b>Correspondence</b>	<b>Audit Type</b>	<b>Voter Status</b>	<b>Voter Status Reason</b>
Registration Cancellation Notification	Voter Status	Cancelled	Moved Out of Jurisdiction
Registration Cancellation Notification	Voter Status	Cancelled	Request for Removal
Voter Registration Card	Transaction Source	Active	<i>See important note below.</i>
Voter Registration Card	Political Party	Active	<i>See important note below.</i>

**Important Notes:**

If the county decides to send a voter registration card every time the “Transaction Source” is changed for an “Active” record, this rule will need to be removed before processing NCOA records. The rule can be added again after NCOA processing is completed.

If the county decides to send a voter registration card every time a voter’s party affiliation is changed either manually or when importing data for the primary election, the correspondence rule must be configured.

For instructions on how to add correspondence rules, see the “I-VOTERS Instructions” section.

## **Types of Correspondence**

The correspondence described in this section will be automatically generated and sent to “Batch Management” in I-VOTERS if the minimum legally required correspondence rules are set up correctly in the county’s “System Configuration.” For assistance verifying compliance with minimal correspondence rules, please contact the I-VOTERS Help Desk at 1-877-442-7670.

### **Voter Registration Cards**

These cards must be sent by nonforwardable mail. If the voter’s mailing address is different than the residential address, send the card to the mailing address.

[§48A.26(1), 48A.26(2)]

### **Notice of Incomplete Registration**

Send this notice to voters with “Incomplete” status.

I-VOTERS will generate the notice with the appropriate reason for the “Incomplete” status if the status reason is “Registration Incomplete” and the DL and SSN fields are blank or the “No Signature” box is checked in the voter’s record.

If the voter’s status reason is “Registration Incomplete” due to lack of name, gender, date of birth, or residential address, use the “Notice of Incomplete Registration” available in the Election Forms Library.

This notice must be sent by nonforwardable mail. A voter registration form must be included.

[§48A.26(1), 48A.26(3)]

### **Notice of Pending Registration**

Send this notice to voters with “Pending” status. I-VOTERS will generate the notice with the appropriate reason for the “Pending” status.

This must be sent by nonforwardable mail. A voter registration form must be included.

[§48A.25A(1)(a), 48A.26(1), 48A.26(3)]

### **Residential Confirmation Notice**

This notice must be sent to voters with “Inactive” status. This notice must be sent by forwardable mail and must include a postage paid preaddressed return card.

[§48A.26(6), 48A.29]

## Registration Cancellation Notice

Send this notice to any voter whose record has been cancelled for the following reasons:

- Felony conviction,
- Adjudged mentally incompetent to vote, or
- “Inactive” status through two successive general election.

**Optional Practice:** Send this notice to voters who have moved to other jurisdictions or who have requested their record to be cancelled.

I-VOTERS will generate the notice with the appropriate reason for the “Cancelled” status when the voter record is saved.

Send this notice by forwardable mail.

[§48A.30(2), IAC 721—28.4]

## Notice to Election Day Registrant

This notice is not available in I-VOTERS. A sample notice is available in the Election Forms Library.

Send this notice to any EDR voters whose voter registration cards are returned as undeliverable. Voters must respond to this notice within 14 days after the notice is mailed. If the voter fails to respond to this notice, the voter’s registration record must be made “Inactive.”

[§48A.26A]

## Mailing Correspondences

Notices must be sent within seven working days of receipt of the voter registration form or the update.

[§48A.26(1)(a)]

### **Exceptions:**

If the voter used election day registration procedures, send notices within 45 days of receipt.

[§48A.26A(1)]

If a voter registration form was submitted at the caucuses, the voter registration card must be sent within 45 days of receipt.

[§48A.26(2)]

## **Voter Registration List Maintenance**

### **Annual Processes**

#### **National Change of Address (NCOA)**

The NCOA process compares voters' addresses in I-VOTERS with change of address forms received by the U.S. Post Office.

“Active” and “Pending” voters whose addresses do not match the address the post office has on file are sent a notice asking them to confirm their addresses. Records of voters who appear to have moved within the county are automatically updated to reflect the change of address. Records of voters who appear to have moved outside the county are changed to “Inactive” status until the voter’s address can be confirmed.

NCOA notices must be sent in the first quarter every year. The notice is sent by forwardable mail to the voter’s address as indicated by the U.S. Post Office. The SOS will facilitate this process and provides instructions to the counties.

[§48A.27(4), 48A.28(2), IAC 821—9]

#### **Countywide Mailing**

If it chooses not to participate in the annual NCOA mailing, the county must send a countywide mailing.

Every “Active” and “Pending” registered voter in the county must be sent a confirmation card. The notice must be sent by forwardable mail to the voter’s residential address (or mailing address if different). It must be sent in February.

[§48A.28(3), IAC 821—10.2, 10.4]

#### **Cross-State Match**

The SOS works with other states to identify potential duplicate or multiple voter registration records. The SOS then sends a list of possible duplicate records to counties for processing.

Within 15 days of receipt, the county must review the list for accuracy. If the county determines the voter has more recent voter registration activity in another state, the voter’s status must be made “Inactive.” The voter must be sent a residential confirmation notice.

[IAC 721—28.3(3), 28.3(4)]

## **Biennial Processes**

### **No Activity Notices**

This process is conducted after every general election. This notice must be sent to all “Active” and “Pending” voters who have not voted and who have not made any updates to their voter records for a period of two general elections.

Send this notice in the first quarter of the year by forwardable mail. The SOS provides instructions for sending and processing No Activity cards.

[§48A.28(2)(b), IAC 821—10]

### **Inactive to Cancelled**

A voter record may be cancelled if the record has been inactive for two successive general elections. The SOS provides instructions to the counties on this process. Voters cancelled during this process must be mailed cancellation notices.

[§48A.30(1)(f)]

## Voter Registration List Requests

### Public Record

Voter registration records are public records as defined in Chapter 22 of the *Iowa Code* and must be available for public inspection at reasonable times. Original voter registration records should never be removed from the auditor's office except upon request of the auditor, under a court order, or as allowed by §48.32.

[§48A.34, 48A.35]

A log must be maintained of the name, address, and telephone number of every person who reviews registration records or obtains a voter list.

[§48A.38(3), IAC 821—3.3, 3.4]

A history of a voter's participation in elections must be maintained for at least two general, primary, school, and city elections. Absentee voting must be recorded for the previous two general and primary elections. This is completed in I-VOTERS when election registers are updated at the end of each election and the election is posted and closed.

[§48A.37(1)]

### Requests for Information from Voter Records

Iowa law allows for the purchase of voter registration lists. Requests can be made with the SOS or auditors.

Information from voter registration records can only be used:

- To request a voter's vote at an election,
- For a genuine political purpose,
- For bona fide political research, or
- For a bona fide official purpose by an elected official.

Using the information for any commercial purpose is a serious misdemeanor under Iowa law.

[§48A.39]

List requests must be handled in the same manner every time a request is received. The auditor should determine whether to process all requests in office or to forward requests to the SOS.

[IAC 821—3.5]

Lists requests for statewide or congressional district voter information must be obtained from the SOS. Auditors may provide voter registration lists for districts that are located in whole or in part within the county.

[IAC 721—28.2(3)]

Lists must never include confidential data such as driver's license numbers, non-operator ID numbers, Social Security numbers, and the agency where the voter registered to vote (if any).

[§48A.38(1)(f), IAC 821—3.8, 3.10]

## Log Required

A log must be kept containing information for every person who receives voter registration information, even if the request is over the phone or in person or if the request is for a single record. Logs and voter list requests are also public records.

[§48A.38(3), IAC 821—3.3, 3.4]

The log may consist of copies of fulfilled voter lists requests but must contain the following information at a minimum:

- The name of the requestor,
- The address of the requestor, and
- The telephone number of the requestor.

The requestor must also agree to the following statement:

*“I am aware that information from voter registration records may be used lawfully only to request a registrant’s vote, for a genuine political purpose, for bona fide political research, or for a bona fide official purpose by an elected official. I understand that using the information for any commercial purpose is a serious misdemeanor under Iowa law. I agree to pay the cost of the above ordered list upon delivery.”*

The requestor must either sign a document with this statement or affirm it over the phone. If the statement is sworn over the phone, make note that the requestor was read the statement.

[§48A.38(3), IAC 821—3.2, 3.3, 3.4]

**Best Practice:** The “Specifications and Order Form for Voter List” may be used for the purpose of keeping a log. The voter list order form is available in the Election Forms Library.

If a voter requests information about the voter’s own record, be sure you are speaking with the voter directly. Voters have the right to view their own record, including confidential information associated with it. You do not need to keep a log for this type of request.

[IAC 821—3.9]

## **Voter List Fees**

Payment must be made for voter lists before the list can be given to the requestor. The auditor may determine how much to charge for voter lists. The prices must be consistent for all list requests. The auditor may choose to use the same fees as the SOS. See the “Specifications and Order Form for Voter List” for the SOS fee list.

[§48A.38(1), IAC 821—3.7]

## **Information Over the Phone**

The auditor should set a policy for handling requests for information that can easily be given over the phone. If the information is given over the phone, the requestor must still affirm that the information will only be used for a legally authorized purpose and the requestor’s name, address, and telephone number must be collected.

[IAC 821—3.4]

## Certified Copies of Voter Registration Records

### Overview

The public may request a certified copy of a voter registration form, even if the form was completed in the office the same day. Registrants may wish to use the certified copy for a number of legal, governmental, or personal purposes.

If requested, provide a certified copy of the form. Payment must be made for certified copies before the copy can be given to the requestor. The auditor may determine how much to charge for certified copies. The prices must be consistent for all requests.

[§331.502(2)]

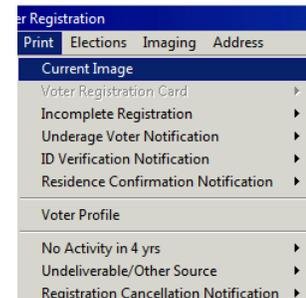
### Process for Issuing Certified Copies

If a registered voter is requesting the copy, be sure the person is the registered voter. Ask for an ID or ask the person to verify information on the voter registration record.

If someone is requesting a copy of another person's record, process the request as a list request. The request must be entered in your log.

Make a copy of the form by either photocopying the registration form or printing a copy of the scanned form from I-VOTERS. To print from I-VOTERS:

1. Search for and open the voter's record.
2. From the "Imaging" drop-down, select "Voter Image." Choose the voter's registration form in the "Image" drop-down.
3. From the "Print" drop-down, select "Current Image."
4. Redact the voter's driver's license number and Social Security number if someone other than the voter requests the copy. If the voter made the request, ask the voter if you should redact any information.
5. Follow the certification process used by the office for other documents.



**Best Practice:** Consult with the county attorney to develop a certified copy form for your county, including a disclaimer if desired. The disclaimer could state that the auditor is certifying that the document is merely a copy of a record on file with the auditor and is not certifying the accuracy or veracity of any of the information contained on the form.

## Overview of I-VOTERS Voter Registration Modules

### Voters Menu

- **Voter Registration**

Use this to enter new voter registration records.

- **Voter Search**

Use this to search the database for voter registration records.

- **Voter Merge**

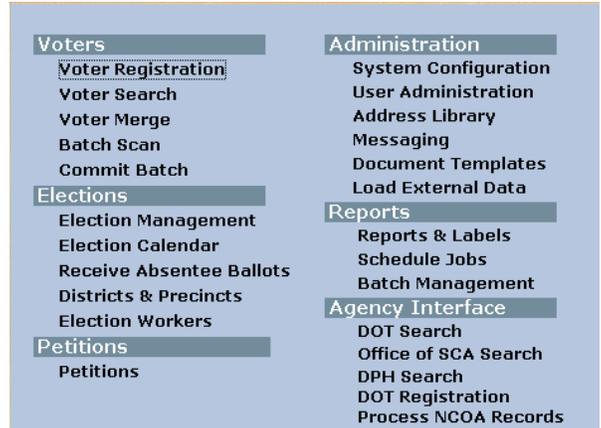
This module allows you to combine two or more existing records for the same voter into one record. It also allows you to search for potential duplicate records and decide whether the records should be merged or not. See the “Duplicate Records Search” section.

- **Batch Scan**

Use this to scan documents to attach to voters’ records later. See the “Scanning” section.

- **Commit Batch**

Use this to move scanned batches from your local computer to the server to attach the voter documents to voters’ records. See the “Scanning” section.



### Administration Menu

- **System Configuration**

Use this module to configure certain features of I-VOTERS to meet the county’s needs such as voter correspondence.

- **Address Library**

Use this to keep your street and address files up to date. Consult with the mapping/real-estate division in your office to work out a schedule for keeping your address library up to date. This function ensures that only verified addresses in your county can be used for voter registration and allows voters to be assigned to the correct precinct. See the “I-VOTERS Instructions” section.

## **Reports Menu**

- **Reports and Labels**

Produce reports on your districts, precincts, election data, and voter registration lists from this module.

- **Batch Management**

This module keeps track of voter correspondence that is automatically generated by I-VOTERS (e.g. voter registration cards, residential confirmation notices, incomplete registration notices, etc.) based on correspondence rules established in “System Configuration.” See the “Voter Correspondence” section.

## **Agency Interface Menu**

See the corresponding sections of each module in this chapter for more information.

- **Office of SCA Search**

SCA stands for State Court Administrator. The SOS enters felony convictions and restorations of rights information into this search. Use this module to verify the statuses of voting rights for people convicted of felonies or to perform a search of potential convicted felon matches to voters in your county.

- **DPH Search**

Use this to search the Department of Public Health’s death records. This also has a search function to identify possible deceased voters in your county and to cancel their voter registrations as required by law.

- **DOT Registration**

Use this module to process registration applications completed at driver’s license offices.

- **Process NCOA Records**

Use this menu if your county opts to participate in the NCOA process during the first quarter of each year. SOS provides instructions on this process each year.

## Processing Voter Registrations

### New County Registrant Before Pre-Registration Deadline

1. Open “**Voter Registration**” from the main I-VOTERS screen.
2. Click “**New.**”

The screenshot shows the I-VOTERS registration form. At the top, there are buttons for 'New', 'Save', 'Clear', 'Search', and 'Process Batch'. Below these are input fields for 'Voter ID', 'Driver License' (123AB4567), 'SSN', 'Birth Date' (09/09/1899), 'Age' (109), 'Gender' (Male), 'Last Name' (CITIZEN), 'First Name' (JOHN), 'MI' (A), and 'Suffix' (IV). The 'Residence' section includes tabs for 'Absentee', 'History', 'Contacts', and 'Prev Registration'. It has a dropdown for 'Standard' and a 'Clear' button. Below are fields for 'House #', 'Suffix', 'Pre Dir', 'Street Name', and 'Type'. There are also fields for 'Post Dir', 'Unit Type', 'City/St/Zip', and 'County' (JOHNSON). A 'Mailing' section includes 'Country' (UNITED STATES OF AMERICA), 'Address', and 'City/St/Zip'. On the right, there are sections for 'Voter Polling Locations' with 'Precinct' and 'Split' fields, and two tables for 'Election Type' and 'Election'.

3. Enter the registrant’s personal information on the top line.

The cursor is automatically set in the “**Driver License**” field and is ready for the voter’s information to be entered. Enter all information on the first row, tabbing between fields.

**Important Note:** By tabbing, the automatic processes that verify driver’s license numbers and check for potential duplicates, felons, and death records will activate and perform.

- **SSN**

Enter only the last four digits of the Social Security number, even if the voter has provided the full number.

- **Birth Date**

Registrants must be at least 17 ½ years old. I-VOTERS will not save “Active” records for voters whose dates of birth are less than 17 ½ years from the current date.

See “What to Do If” section if the registrant is younger than 17 ½ years old.

- **Suffix**

Enter a suffix only if the person has “Sr., Jr., III, etc.” after his or her last name (e.g. John J. Smith, III). Ms., Mr., Mrs., Dr., Rev., etc. are titles and not suffixes. They should not be entered in this field.

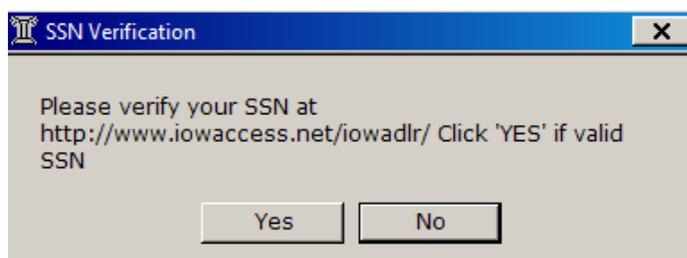
4. Once you tab past the “**Suffix**” field, I-VOTERS will automatically search for any potential matches with other voter registration, felon, or death records. If any matches are brought up, you will need to consider the information presented and decide if it is a match or not.

If one of the voters listed on the screen appears to match the registrant you are entering, click on the match listing so it is highlighted and click “**Select**.” See the “What to do If” section for more information on determining whether there is a match.

If you confirm in the system that the record matches a felony conviction record, I-VOTERS will automatically change the person’s status to “**Cancelled**” and the Reason will be “**CF – Convicted Felon**.” A cancellation notice will be automatically generated and sent to “**Batch Management**” if the correspondence rule is set up correctly. See the “Voter Correspondence” section.

If the voters listed do not match the registrant, click “**No Match**.”

5. If the voter is a new registrant to the state and the voter provided the last four digits of the SSN, verify the voter’s information on the Iowa Interactive website:  
[www.iowaccess.net/iowadlr](http://www.iowaccess.net/iowadlr).



If you do not have a username or password to access to this website, please contact Iowa Interactive at 515-323-3468.

**Important Note:** If the voter provided their Iowa driver’s license or non-operator ID number and it was verified, you do not also need to verify the voter’s SSN to make the voter record “Active.”

6. Click “**Yes**” after verifying the SSN. If the SSN cannot be verified, click “**No**.”

If the SSN cannot be verified and the voter did not provide a driver’s license number, the voter must be assigned “**Pending**” status.

7. Enter the voter’s address in the “**Residence**” tab. Tab through these fields as well.
8. If I-VOTERS cannot match the address you are entering with the “**Address Library**,” the “**Address Library**” screen will appear.

- **Standard vs. Non-Standard Address**

The drop-down menu beneath the word “**Residence**” automatically defaults to “**Standard**.” Most addresses will be standard addresses.

An address may be entered as “**Non-Standard**” if a voter is homeless or did not provide a residential address. See the “What to do if...” section of this chapter for more information.

- **Suffix**

This suffix field is used if the address has a letter or fraction after the numerical portion of the address (e.g. 123A Main St or 221½ Washington Ave).

- **Unit Type**

If the address contains an apartment number, lot number, room number, etc., enter the type of unit here (e.g. 123 S Main St, Apt 7, enter "APT" in this field).

- **Unnamed Field to the Right of Unit Type**

Enter the number of the unit here (e.g. 123 S Main St, Apt 7, enter "7" here).

- **Mailing**

- Enter the mailing address if the voter submitted a registration form with a mailing address listed and it is different than the mailing address currently on the registration record or if no mailing address is currently listed on registration record.
- Remove the mailing address if the voter submitted a registration form with no mailing address listed but a mailing address is currently listed on the registration record.
- Do not change or remove the mailing address if the voter submitted a registration form with no change to the residential address and mailing address.

[IAC 821—7.1]

9. Choose the registrant's party affiliation.

Select the party affiliation the voter marked on the registration form. If the voter chose "Green" or "Libertarian," select "**Other**" and then choose "**Iowa Green**" or "**Libertarian**" in the "**Organization**" field.

If the voter did not mark a party affiliation on the registration form, select "**No Party**."

10. Select the "**Transaction Source**."

See the "Transaction Sources, Statuses, and Status Reasons" section for more information.

Registration	Misc Info	Custom
Party	No Party	Organization
Transaction Source		<input type="checkbox"/> DOT Verified
Status	A - Active	<input checked="" type="checkbox"/> SSA Verified
Reason		Verify

11. Select the "**Status**."

See the "Transaction Sources, Statuses, and Status Reasons" section for more information.

**Important Note:** If the voter is at least 17 ½ years old but not 18, I-VOTERS will automatically assign the voter an "**Active**" status. The "**County Registration**" date and the "**Vote Eligible**" date will automatically default to the voter's 18<sup>th</sup> birth date.

12. If that registrant’s status is “**Inactive**,” “**Pending**,” or “**Incomplete**,” choose the “**Reason**” for the status designation.

**Important Note:** If a new registrant does not sign the registration form, assign the registrant a status of “**Incomplete**” with the reason “**Registration Incomplete**” and check the box next to “**No Signature**.”

The screenshot shows a registration form with the following fields and values: Transaction Source: 02 - Mail-in Registration; Status: N - Incomplete; Reason: RI - Registration Incomplete; County Registration: 04/01/2009; and a checked checkbox for 'No Signature'. There are also checkboxes for 'DOT Verified' and 'SSA Verified', and a 'Verify' button.

See the “Transaction Sources, Statuses, and Status Reasons” section for more information.

13. Confirm the “**County Registration**” date.

If the pre-registration deadline has not passed, this should be the date the registration was received in the auditor’s office as long as the voter is 18 years old. For agency or DOT registrations, the date of the registration is the day they were completed at the agency or the DOT if that day was before the pre-registration deadline.

**Important Note:** If the voter was previously registered in your county and is currently assigned “**Cancelled**” status, be sure to change the “**County Registration**” and “**Vote Eligible**” dates to the correct date when processing the new registration. These dates will not update automatically.

If the voter is 17½, I-VOTERS will automatically assign the “**County Registration**” date and the “**Vote Eligible**” date to the voter’s 18<sup>th</sup> birth date.

If the pre-registration deadline has passed, see the “New County Registrant after Pre-Registration Deadline” instructions in this chapter.

- Check the postmark on all by-mail registrations after the deadline to see if they were postmarked 15 days (the worry-free postmark date) or more before election day. If they were, the date of registration is the worry-free postmark date.

[IAC 821—2.12]

14. Confirm the “**Vote Eligible**” date.

This should default to the same day as the “**County Registration**” date. If it does not, then make it the same as the “**County Registration**” date.

15. Enter the registrant’s home telephone number and email address (if provided) under the “**Contacts**” tab.

The screenshot shows the 'Contacts' tab with a table containing the following information:

Contact Type	Value	Unlisted
Home Phone		<input type="checkbox"/>
Office Phone-		<input type="checkbox"/>
Office Phone-		<input type="checkbox"/>
Cell Phone		<input type="checkbox"/>
Email		<input type="checkbox"/>
Pager		<input type="checkbox"/>
FAX		<input type="checkbox"/>
URL		<input type="checkbox"/>

16. Enter the registrant's previous registration information (if provided).

**Important Note:** If the voter was registered in another county in Iowa, you should have already located their record and moved that record to your county instead of creating a new record. See step 4.

If the voter was registered in another state, this information must be entered so a notice can be sent to that state. This allows the other state to cancel the voter's record and prevents the voter from being registered in more than one place. All notices to other states are sent by the SOS based on "**History**" information entered in I-VOTERS.

Enter previous registration information under the "**History**" tab.

- a. Choose the "**History**" tab. Click "**Add.**"  
The "**Voter Registration – Move History Detail**" box will appear.
- b. Enter the "**County Registration**" date as the effective date.
- c. Enter the information for the voter's previous address. Click "**Add.**"

The screenshot shows a web application interface with several tabs: Residence, Absentee, History, Contacts, Prev Registration, and Voter Polling Locations. The 'History' tab is active. Below the tabs is an 'Alternate Name' section with fields for Last Name, First Name, Middle Name, and Suffix. Below that is a 'Voter Move' table with columns for Effective and Address. A dialog box titled 'Voter Registration - Move History Detail' is open, containing fields for Effective (with a calendar icon), Prev County (a dropdown menu), Address (a text area), City (a dropdown menu), State (a dropdown menu set to 'IA'), and Zip (a text field). There are 'Add' and 'Close' buttons at the bottom of the dialog box. The main application window also has 'Add' buttons at the bottom of the 'Alternate Name' and 'Voter Move' sections.

If the voter used a different name previously, enter that information under "**Alternate Name.**"

17. Click "**Save**" at the top of the voter registration screen. A message will appear indicating the voter's record was successfully saved. I-VOTERS will assign the voter a unique "**Voter ID**" number.

18. Send the registrant an acknowledgment. See the "Voter Correspondence" section for more information.

## **New County Registration After Pre-Registration Deadline, Not Voting Absentee**

These instructions apply when:

- You receive a voter's registration form in the mail after the pre-registration deadline, or
- You receive a voter's registration form from the DOT or an NVRA agency after the pre-registration deadline, or
- A voter who has never been registered in your county or is now cancelled comes to your office and wants to register but not vote by absentee.

Process the form as normal except change the **"County Registration"** date and **Vote Eligible"** date to the day after the upcoming election unless postmarked on or before the worry-free postmark date.

### **Received by Mail After Pre-Registration Deadline**

Check the postmark to see if it was postmarked 15 days (the worry-free postmark date) or more before election day. If it was, the **"County Registration"** date and **"Vote Eligible"** date are the worry-free postmark date.

If it was postmarked after the worry-free postmark date, the **"County Registration"** date and **Vote Eligible"** date are the day after the upcoming election.

### **Received by DOT/Agency After Pre-Registration Deadline**

The **"County Registration"** date and **"Vote Eligible"** date are the day after the upcoming election.

### **Received In-Person After Pre-Registration Deadline**

If received in-person, the **"County Registration"** date and **"Vote Eligible"** date are the day after the upcoming election.

[IAC 821—2.12]

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## In-Office/Satellite EDRs After the Pre-Registration Deadline

These instructions apply when:

- A voter who has never been registered in your county comes to your office or a satellite location and wants to register and vote.
- A voter who was previously registered in your county and is now cancelled comes to your office or a satellite location and wants to register and vote.
- A voter wants to vote absentee and his or her record is currently assigned “Incomplete” status.

Follow these steps when registering a voter and issuing the voter an absentee ballot:

1. Ask the voter to fill out the voter registration form contained on the EDR form. Make sure the form is filled out completely.
2. Ask for the voter’s proof of identity and residence.  
[§48A.7A, IAC 721—21.3]
3. If the voter does not have proof of identity and residence, the attestation procedure may be used.
4. Ask the voter to complete the voter’s oath portion on the EDR form.
  - If using an attester, ask the attester to fill out the attester’s oath portion the EDR form.
5. Open “**Voter Registration**” from the main I-VOTERS screen. Click “**New.**”
6. Enter the voter’s information in the appropriate fields. Tab through the key line so I-VOTERS will automatically identify any statewide duplicate matches.

If you get a duplicate match from a different county, select that record. If I-VOTERS does not identify any duplicates in the system, proceed as usual.

- b. Enter the voter’s address.
- c. Choose the appropriate party from the drop-down menu.
- d. Select “**15 – Election Day**” as the “**Transaction Source.**”

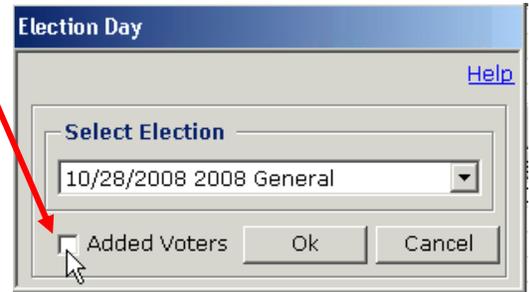


The screenshot shows a portion of the I-VOTERS registration form. It features four dropdown menus with the following values: Party (No Party), Transaction Source (15 - Election Day), Status (A - Active), and Reason (empty). A mouse cursor is visible over the Party dropdown menu.

Party	No Party	Organization
Transaction Source	15 - Election Day	
Status	A - Active	
Reason		

- An **"Election Day"** window will appear. Choose the election.

**Important Note:** Make sure to uncheck the **"Added Voters"** box when processing EDR registrants before election day. This box is only used for voters who vote EDR at the polls. If you do not uncheck the box, it will add them to the election registers as an added voter and you will have difficulty printing your election registers.



- Make sure the voter's status is **"Active."**

**Important Note:** An EDR voter's ID number does not need to be verified. EDR voters should not be placed on "Pending" status because they showed proof of identity at the time of registration.

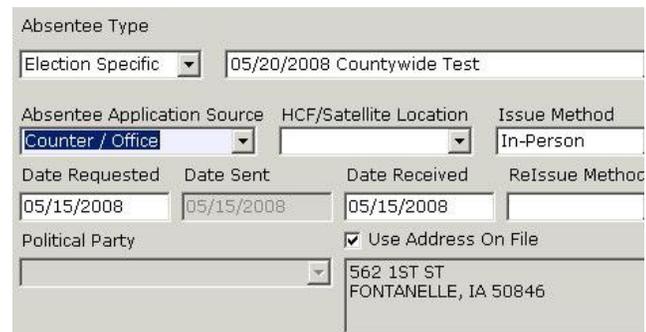


- The **"County Registration"** date and the **"Vote Eligible Date"** will automatically populate to election day for the selected election.

Change the **"County Registration"** date and the **"Vote Eligible"** date to the date the voter appeared in your office or at the satellite location.

- Save the voter's record.

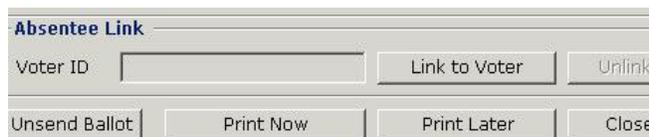
- Enter an absentee request for the voter.



If the voter is in your office, choose **"Counter/Office"** as the **"Absentee Application Source."**

If the voter is at a satellite location, choose **"Satellite"** as the **"Absentee Application Source."**

- Select **"Print Now"** or **"Print Later,"** depending on your county procedures.



13. Attach the voter's EDR form (including a voter registration form and oath form and attester's oath) to the voted ballot affidavit envelope.
  
14. If the ballot is received before 5 p.m. on the Friday before the election (Saturday if for a primary or general election), review the affidavit envelope for completeness and defects according to the procedures in IAC 721—21.354.
  - If there are no defects and the affidavit is complete, store the ballot together with the EDR form in a secure place before delivering to the ASVP board.
  - If there are defects with the voter's affidavit envelope or if the affidavit is incomplete, follow the procedures in IAC 721—21.354 for notifying the voter about fixing the defect or completing the affidavit. Store incomplete and defective affidavit envelopes separate from other affidavits. See the "Absentee Voting" chapter for more information.
  - If the voter's registration card is returned undeliverable by the post office, deliver the absentee ballot and voter registration card to the ASVP board to be challenged pursuant to §53.31(1).

## **EDRs Received At the Polls on Election Day**

After election day, you may have three different types of voters who used EDR procedures at the polling place.

1. Voters who have never been registered to vote in your county, including voters who are currently assigned “Incomplete” status

Process these voters in I-VOTERS using the instructions below.

2. “Cancelled” voters who were previously registered to vote in your county or another county

Process these voters in I-VOTERS using the instructions below.

3. Voters who are already registered to vote in your county who reported a change of address at the polling place on election day

**Important Note:** There is nothing that prevents precinct election officials from using the EDR procedure for voters who are already registered to vote in the county and who are reporting a change of address at the polls on election day, provided the voter has the required identification to use the EDR procedure; however, these registrations should be processed in I-VOTERS as election day updates, not election day registrations. Process these voters in I-VOTERS using the “Within County Moves & Other Updates Received Between the Pre-Registration Deadline and Election Day” instructions. Update the voter’s registration information before giving vote credit in “Election Management > Process Election Register.”

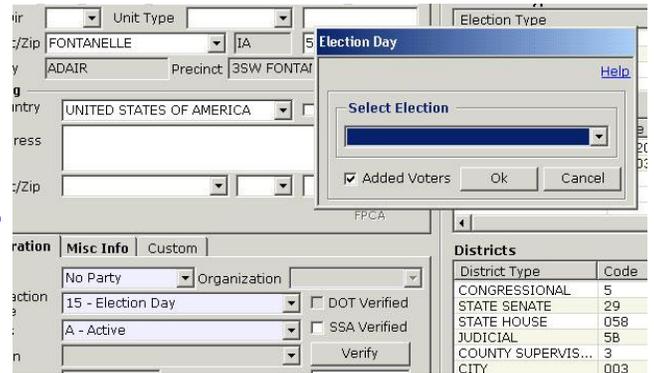
## **New Voters to County, Including Incomplete and Cancelled Voters Previously Registered**

1. Open “**Voter Registration**” from the main I-VOTERS screen. Select “**New.**”
2. Enter the voter’s information in the appropriate fields. Tab through the fields so I-VOTERS will automatically identify any statewide duplicate matches.
  - a. If you get a duplicate match from a different county, select that record and continue with these steps.
  - b. If you get a duplicate match within your county, follow the “Election Day Within County Moves” instructions.
  - c. If I-VOTERS does not identify any duplicates in the system, continue with these steps.
3. Enter the voter’s address.
4. Choose the appropriate party from the drop-down menu

5. Select “15—Election Day” as the “Transaction Source.”

6. The “Election Day” window will appear. Choose the election.

7. If you leave the “Added Voters” checkbox marked, the voter will automatically appear in “Election Management > Process Election Register > Process Added Voters” for the precinct where they are now registered to vote. They will also be added to the end of the election register proof for that precinct.



8. Make sure the voter’s status is “Active.” Verify the “County Registration” date and the “Vote Eligible” date are the date of the election.

**Important Note:** An EDR voter’s ID number does not need to be verified. EDR voters should not be placed on “Pending” status because they showed proof of identity at the time of registration.

9. Save the voter’s record.

## Election Day Within County Moves

1. Open **"Voter Search"** from the main I-VOTERS screen.
2. Search for the voter's record.
3. Follow the same procedures for as when entering new voter registration records, except that it is not necessary to verify the voter's driver's license number or Social Security number after that information has been verified once in your county.
4. Choose **"7- In Person/Registration Drive"** as the **"Transaction Source."**
5. If the registration form is a true duplicate with no changes, mark **"Duplicate Registration Received"** under the **"Misc"** tab.

The screenshot shows a web-based form with three tabs: 'Registration', 'Misc Info', and 'Custom'. The 'Misc Info' tab is active. Fields include: 'Secondary Lang' (dropdown), 'Last Verified' (04/22/2011), 'Special Assistance' (dropdown), 'Ballot Style' (NO APPLICABLE ELECTION), 'State Reg Date' (09/09/2002), 'Last Upd. Date' (11/18/2011), and 'Source of Update' (Administrative). A dropdown menu is open below 'Source of Update', listing options: Administrative, Attached Image, Cancelled Registration, Clerical Error Correction, Duplicate Registration Received (highlighted), New Registration, and Registration Updated. There are also 'Audit Comment' and 'Comments' fields.

6. When you are finished updating the record, click **"Save."** Make note of the voter's ID number to use to give the voter vote credit.
7. Send an acknowledgement to the voter. See the "Voter Correspondence" section for more information.

See the Post Election Day chapter for instructions on giving the voter vote credit.

## Within County Moves & Other Updates Received Between the Pre-Registration Deadline and Election Day

1. Open **"Voter Search"** from the main I-VOTERS screen.
2. Search for the voter's record.
3. Follow the same procedures for as when entering new records, except that it is not necessary to verify the voter's driver's license number or Social Security number after that information has been verified once in your county.

Choose the transaction source that best fits the update (i.e. **"By Mail"** if the update was received by mail, **"In-Person"** if received in person, etc.). See the "Transaction Sources, Statuses, and Status Reasons" section for more information.

4. If the registration form is a true duplicate with no changes, mark **"Duplicate Registration Received"** under the **"Misc"** tab.



Registration	Misc Info	Custom
Secondary Lang	<input type="text"/>	Last Verified 04/22/2011
Special Assistance	<input type="text"/>	
Ballot Style	NO APPLICABLE ELECTION	
State Reg Date	09/09/2002	Last Upd. Date 11/18/2011
Source of Update	Administrative	
Audit Comment	<input type="text"/>	
Comments	DOT AU	

5. When you are finished updating the record, click **"Save."**
6. Send an acknowledgement to the voter. See the "Voter Correspondence" section for more information.

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## Processing DOT Registrations

### Overview

In general, all applications for driver's licenses or non-driver's ID cards are considered to also be voter registration applications or updates unless the person specifically declines the registration opportunity.

[§48A.18(1), 48A.18(2)]

Voter registrations from the DOT (which has a paperless system) are submitted to the appropriate auditor's office every day.

[IAC 821—8.1]

### Processing in I-VOTERS

1. Select **"DOT Registration"** on the main I-VOTERS screen.
2. Click **"Search."** This will display all the records for your county, including processed and unprocessed records.

**Recommended Practice:** Delete the records you have already processed so they will not appear each time you hit the **"Search"** button. Once a record shows up as **"Processed,"** highlight it by clicking on it and click the **"Delete"** button.

The screenshot shows a web application window titled "DOT Registration". At the top, it says "Number of Records Retrieved 12". Below this is a search form with fields for "Batch ID", "Created From", and "Created To", and a "County" dropdown menu set to "FABLE". There are "Search" and "Clear" buttons. Below the search form is a table with the following columns: "Driver License", "Name", "DOB", "SSN", "Party", "PartyOrgani...", "County", "Processed?", and "Registration D". The table contains 12 rows of data, including records for John Citizen, Jane Doe, Polly Pollworker, Victor Voter, Joseph Public, Juan Ciudadano, Patricia Pollwatcher, Candace Candidate, Audrey Auditor, Connie Commissioner, Samuel Supervisor, and Regina Registrar. At the bottom of the window, there are "Process", "Delete", and "Print" buttons, a "Change Voters County" dropdown menu, and a "Close" button.

3. Click on the first record you want to process and then click **"Process."**

This will take you to the **"Voter Registration"** screen, and I-VOTERS will automatically search for any potential matches with other voter registration, felon, or death records. If any matches are brought up, you will need to consider the information presented and decide if it is a match or not.

If you confirm in the system that the record matches a felony conviction record, I-VOTERS will automatically change the person's status to **"Cancelled"** and the Reason will be **"CF – Convicted Felon."** A cancellation notice will be automatically generated and sent to **"Batch Management"** if the correspondence rule is set up correctly. See the **"Voter Correspondence"** section.

### Wrong County

If the voter should be registered in a different county, select the voter's record so it is highlighted. Select the county the registration should be forwarded to in the **"County"** drop-down, and click **"Change voters county."**

4. Select “Clear” to clear out the voter’s current address information.

The screenshot shows the 'Voter Registration' application window. At the top, there are menu options: Voter, Print, Elections, Imaging, Address, and Help. Below the menu is a toolbar with buttons for New, Save, Clear, Search, and Process Batch. The main form contains fields for Voter ID (750084718), Driver License (123AB4568), SSN, Birth Date (09/09/1899), Age (109), Gender (Male), Last Name (CITIZEN), First Name (JOHN), MI (A), and Suffix (IV). The 'Residence' section has tabs for Absentee, History, Contacts, and Voting History. A 'Clear' button is located in the Residence section. The 'Voter Polling Locations' window is open and highlighted with a red box, showing the following information:

Voter Polling Locations	
FULL NAME :	JOHN A CITIZEN IV
SSN :	
DATE OF BIRTH :	09/09/1899
RES.ADD :	123A N MAIN ST APT 7 NORTH LIBERTY 52317-00000

Below the polling locations window is the 'Election Type' section with a table:

Election Type	Polling Place
School	NL01 NL COMMUNITY CENTER
City Election	NL02 N LIBERTY COMMUNITY CENTER
General/Primary General	NL02 N LIBERTY COMMUNITY CENTER

5. Update the voter’s record with the information in the DOT registration. The information transmitted by the DOT will be on the upper right hand of the screen underneath “**Voter Polling Locations.**”
  - a. Enter the voter’s address (or update it to the current address) and the other information. To see the rest of the information, use the scroll bar on the right-hand side of the window.

**Important Notes:**

  - If the DOT record is a match to an existing record in I-VOTER, be sure to review the party affiliation and mailing address information provided in the DOT record with the voter’s registration record. Make sure the party affiliation and mailing address information was updated in the voter’s registration record correctly.
  - b. The “**Transaction Source**” “**01 – Department of Transportation**” should be pre-selected. Change the “**Status**” field to “**Active**” if it is not already.
  - c. Click “**Save**” at the top left of the screen to return to the “**DOT Registration**” window.
6. The voter’s record you just processed should now show “**Yes**” under the “**Processed**” field. You may delete it from the list by selecting the record and clicking the “**Delete**” button.

**Best Practice:** Process DOT registrations as you process any other voter registrations, at least once a week.

## Exploring a Voter Record

### Voter Menu

The following items are available under the “Voter Menu”:

- **Voter Moves**

Check to see how many voters have moved to your county or from your county in any given date range.

- **Precincts and Districts**

This generates a list of the voter’s precinct and districts to which the voter is assigned. This is the same information that is displayed on the main screen.

- **Elected Officials**

This will generate a list of the elected officials for each of the voter’s districts based on data in “Election Management.” This only works correctly when the positions holders are kept up to date in “Districts and Precincts.”

**Important Note:** This information is not official or up-to-date. Do not use this function to give information to the public.

- **Previous Voter**

Selecting this or using the command Ctrl+P will take you to the previous record you viewed.

- **Linked Non-Duplicate Voter and Add Non-Duplicate Voter**

These are not used in Iowa.

- **Audit Log**

This contains data about the transactions that have taken place on a voter’s record.

#### How to Interpret the Data in Audit Log

The audit log shows when certain data in the voter’s record was changed, what it was changed from, and by whom it was changed.

The screenshot shows the 'Audit Log' application window. At the top, there is a search interface with fields for 'Audit Type', 'Keyword', 'Date From', and 'Date To', along with 'Search' and 'Clear' buttons. Below the search interface is a table with the following columns: Modified, Effective, Type, Value Before, Value After, User, County, and Comment. The table contains several rows of data representing various transactions on a voter's record, such as changes in voter status, residential address, and precinct/district assignments.

Modified	Effective	Type	Value Before	Value After	User	County	Comment
08/25/2008...	08/25/2008	Absentee Addr...	Election Specific	Election Specific	johnson...	Johnson	
08/25/2008...	08/25/2008	Absentee Addr...		Election Specific	johnson...	Johnson	
08/25/2008...	08/25/2008	Absentee Addr...		Election Specific	johnson...	Johnson	
08/25/2008...	08/25/2008	Voter Registrat...		Voter Registrat...	johnson...	Johnson	
08/25/2008...	08/25/2008	Residential Add...	Std:	Std:	johnson...	Johnson	
08/25/2008...	08/25/2008	Effective Date	05/03/2000	08/25/2008	johnson...	Johnson	
08/25/2008...	08/25/2008	Voter Status	Cancelled	Active	johnson...	Johnson	
08/25/2008...	08/25/2008	Voter Status R...	Moved Out of Ju...		johnson...	Johnson	
08/25/2008...	08/25/2008	Residential Add...	Std:	Std:	johnson...	Johnson	Address range e...
08/25/2008...	08/25/2008	Voter Registrat...		Registration Ca...	johnson...	Johnson	
08/25/2008...	05/03/2000	Voter Status	Active	Cancelled	johnson...	Johnson	
08/25/2008...	05/03/2000	Voter Status R...	Moved Out of Ju...		johnson...	Johnson	
01/04/2007...	05/03/2000	Absentee Addr...		Election Specific	johnson...	Johnson	
10/13/2006...	05/03/2000	Absentee Addr...		Election Specific	johnson...	Johnson	
07/20/2006...	07/20/2006	District	10.2 - Kirkwood...	10.2 - Kirkwood...	edwards	Johnson	
01/25/2006...	01/25/2006	Split	Districts Added:...		edwards	Johnson	

When the log is first opened, it is helpful to sort the data chronologically to see the order that things happened. Clicking on "Modified" will sort the data in this order.

If you are having trouble reading the data because some of it is cut off, either adjust the columns by clicking on the line in between the column and moving it to the right or the left or click on "Print Report" at the bottom of the screen. You do not have to actually print the report but the data will be easier to read in this format.

County: Johnson		Voter Audit Log Report				Date: 4/11/2009	
Modified	Effective	Type	Value before	Value after	User	County	Comment
04/09/2009	01/01/0001	Voter Registration Card		Printed/Extracted.	johnson_ad min	Johnson	
08/25/2008	08/25/2008	Absentee Address	Election Specific	Election Specific	johnson_ad min	Johnson	
08/25/2008	08/25/2008	Absentee Address		Election Specific	johnson_ad min	Johnson	
08/25/2008	08/25/2008	Absentee Address		Election Specific	johnson_ad min	Johnson	
08/25/2008	01/01/0001	Voter Registration Card		Voter Registration Card Requested	johnson_ad min	Johnson	
08/25/2008	08/25/2008	Residential Address	Std:	Std:	johnson_ad min	Johnson	
08/25/2008	08/25/2008	Effective Date	05/03/2000	08/25/2008	johnson_ad min	Johnson	
08/25/2008	08/25/2008	Voter Status	Cancelled	Active	johnson_ad min	Johnson	
08/25/2008	08/25/2008	Voter Status Reason	Moved Out of Jurisdiction		johnson_ad min	Johnson	
08/25/2008	08/25/2008	Residential Address	Std:	Std:	johnson_ad min	Johnson	Address range expanded to include new residences.
08/25/2008	01/01/0001	Voter Registration Card		Registration Cancellation Notification Requested	johnson_ad min	Johnson	
08/25/2008	05/03/2000	Voter Status	Active	Cancelled	johnson_ad min	Johnson	
08/25/2008	05/03/2000	Voter Status Reason		Moved Out of Jurisdiction	johnson_ad min	Johnson	
01/04/2007	05/03/2000	Absentee Address		Election Specific	Johnson_M mp2	Johnson	
10/13/2006	05/03/2000	Absentee Address		Election Specific	Johnson_M mp3	Johnson	
07/20/2006	07/20/2006	District			ceedwards	Johnson	
01/25/2006	01/25/2006	Split			ceedwards	Johnson	

## Print Menu

Manually print (or add to the batch to be printed) any of the I-VOTERS notifications from here. You can also print a copy of any images attached to the voter's record.

See the "Voter Correspondence" section for information on the voter notifications listed here.

- **Current Image**

This prints the scanned image you are viewing. See the "Scanning and Attaching Documents" section.

- **Voter Profile**

This report will print with some basic data about the voter.



**Important Note:** Clicking "Print" on any of these notices in a voter's record will add an audit log entry for the voter. "Print Now" will bring up a screen so you can print the notice. "Print Later" adds the notice to a batch that you can print later from the "Batch Management" menu on the main page of I-VOTERS.

## Elections Menu

- **Voting History**

This displays the voter's participation in past elections. This information can also be found in the "Voting History" tab of a voter's record.

- **Active Ballots**

This shows the ballots issued to the voter for current elections.

- **Temporary Parties**

This is not used in Iowa.

- **Provisional Ballot**

This is used to add a provisional ballot to a voter's record.

- **Issue Ballot**

Use this to re-issue spoiled or replacement ballots. See the Absentee Voting chapter for more information.

- **Receive Ballot**

This not used in Iowa.

- **View Worker Info**

This is linked to the "Election Workers" module if the voter is also a precinct election official.

- **Search by Ballot ID**

This is not used in Iowa.

- **Transfer Absentee Request**

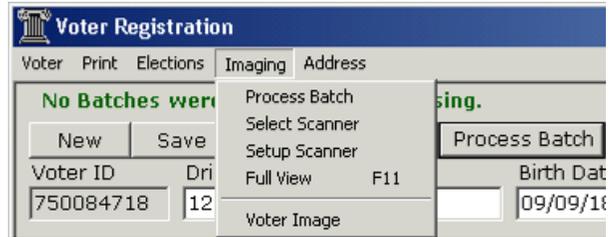
This is not used in Iowa.

The screenshot shows a web application interface for "Voter Registration". At the top, there is a blue header with a logo and the text "Voter Registration". Below the header, there are several tabs: "Voter", "Print", "Elections", "Imaging", and "Address". The "Elections" tab is currently selected. The main content area is divided into two columns. The left column contains a "Voter re" section with a "New" button, a "Voter ID" field containing "7500847", and a "Residen" section with a "Standa" field containing "123". The right column contains a menu with the following items: "Voting History", "Active Ballots", "Temporary Parties", "Provisional Ballot" (with a right-pointing arrow), "Issue Ballot", "Receive Ballot" (with "F12" next to it), "View Worker Info", "Search By Ballot ID", and "Transfer Absentee Request".

## Imaging Menu

- **Process Batch**

This will list batches of scanned voter documents that need to be attached to voter records.



- **Select Scanner/Setup Scanner**

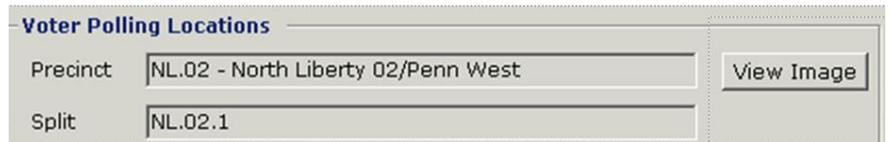
See the “Scanning and Attaching Documents” section.

- **Full View**

Use this to see the entire view of the image.

- **View Image**

Use this to see the scanned records attached to the voter’s record.



You can also see images attached to a voter’s record by clicking on the “**View Image**” button on the main screen of the voter’s record (shown below):

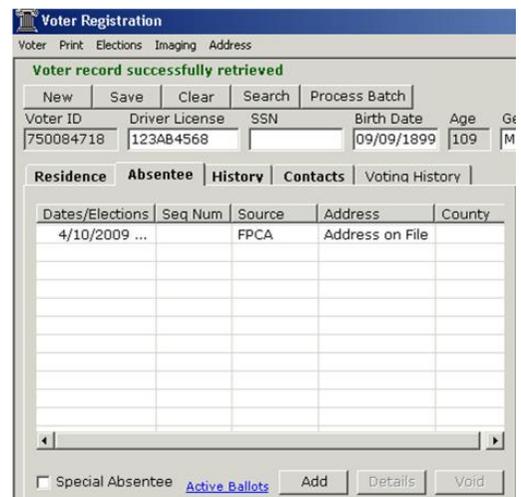
## Address Menu

This menu is only used by SOS staff.



## Absentee Tab

Under this tab, enter absentee ballot requests. You can also see if the voter has submitted absentee ballots requests and view absentee ballot information for open elections.



## **Misc Info Tab**

- **Secondary Lang**

Do not use this field.

- **Last Verified**

This is the last date that the voter's ID information was verified. You can also manually enter a date here if there is a problem with the automatic verification process.

- **Special Assistance**

Do not use this field.

- **Ballot Style**

Do not use this field.

- **State Reg Date**

This is the date that the voter first registered in Iowa. This date may be different than the "County Registration Date."

For example, a voter registered in Linn County in 1999 and then moved to Jackson County in 2008. The "County Registration Date" will show as 01/01/2008 because it refers to the registration date in the voter's current county. The "State Registration Date" will show as 01/01/1999.

- **Last Upd. Date**

This is the last date the voter's record was updated.

- **Source of Update**

Use this field to mark "Duplicate Registration Received" if you receive a registration form that is a duplicate already on file for the voter. See "Updating Registrations" instructions.

- **Audit Comment**

You may add comments here at your discretion or on the main page under "Comments." This is helpful when you need to make a notation on the voter's record that is not a standard field in I-VOTERS (e.g. when you manually verify a voter's driver's license number, etc.).

## Scanning and Attaching Documents to Voter Records

**Recommended Practice:** Scan all voter registration records and attach them to electronic I-VOTERS records. This makes locating information easy and fast.

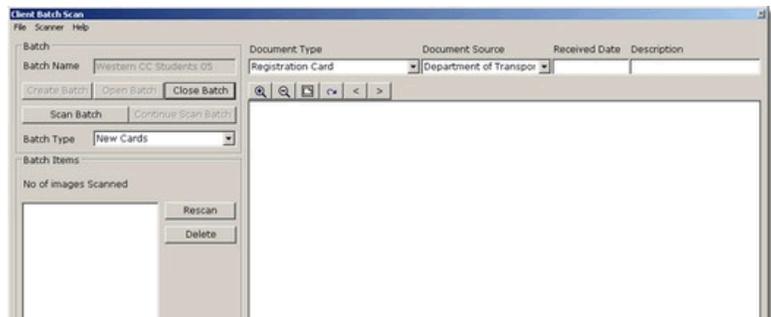
For help with configuring your scanner, see the I-VOTERS manual or call the Help Desk at 1-877-442-7670 (option 1).

### Scanning Documents

1. Select “**Batch Scan**” from the main I-VOTERS screen.
2. Select a group of documents of similar size and shape.
3. Click “**Create Batch.**” The screen changes to show the “**Batch Items**” area in the lower left area along with additional buttons.
4. Complete the following items:

a. **Document Type**

From the drop-down list, select the type of document you are scanning, such as registration card. The document type selected determines the rectangular coordinates the system uses to automatically capture the signature area as a separate, enlarged image.



b. **Document Source**

From the drop-down list, select the method by which the document came to you, such as “**Mail**” or “**Over the Counter.**”

c. **Description**

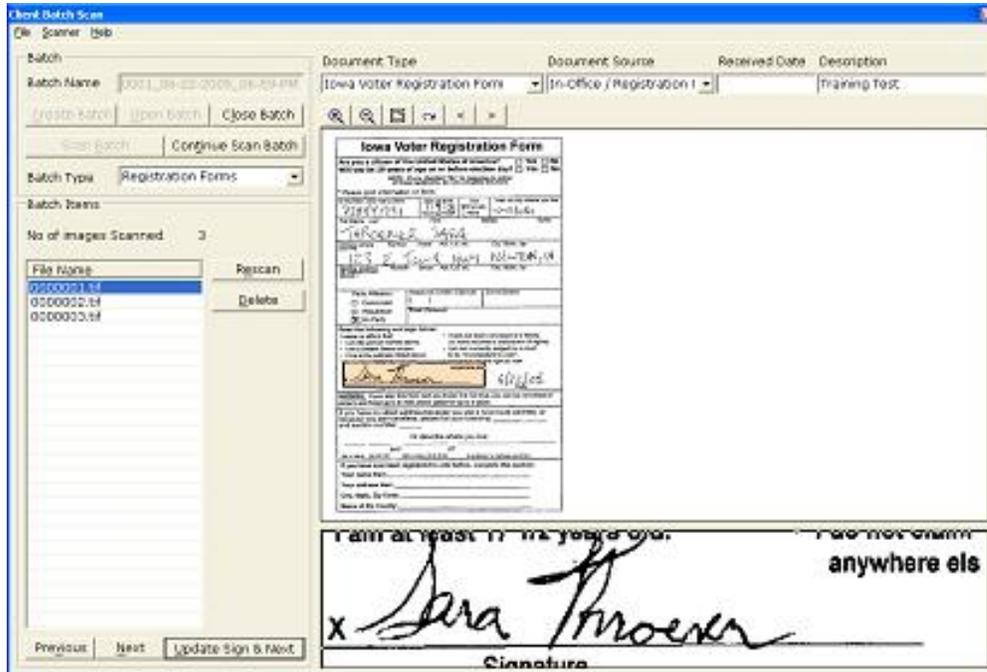
Enter any brief description about this batch for later reference. This is optional.

d. **Batch Type**

This may be used if the county has created subcategories for document types.

5. After the information is entered, click **“Scan Batch”** to start feeding the documents through the scanner.
6. When scanning completes, a list of auto-assigned file names in the **“Batch Items”** area will appear.

The **“Batch Items”** area also shows how many documents were scanned. The large viewing section on the right shows the first document image, including a peach-colored rectangle that should be positioned over the signature.



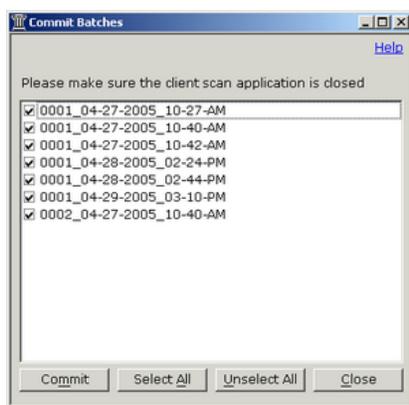
7. Check each image to verify the signature box is positioned correctly. Once the box is correctly positioned, click **“Update Sign & Next.”**
8. Do this for each image. To move up or down the list, use the **“Previous”** and **“Next”** buttons or click on the name of a file.

To add more documents to the same batch, position the documents on the scanner and click **“Continue Scan Batch.”** Be sure not to close the batch before doing this. Otherwise, you will not be able to continue scanning documents into the same batch.

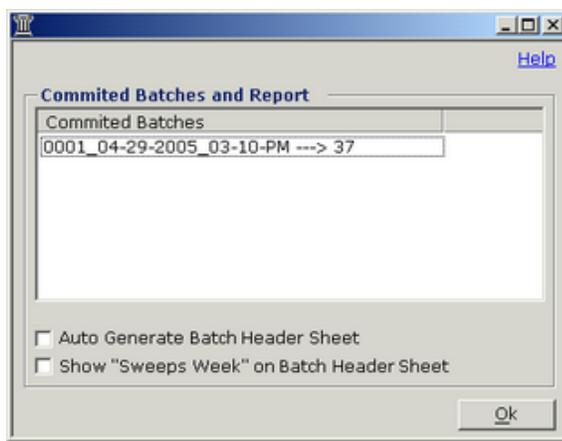
9. When done scanning a batch of documents, click **“Close Batch.”**

- Next, commit the batch to move the batch from your individual workstation into I-VOTERS. Select **Commit Batch** from the main I-VOTERS screen.

A screen that looks like this will appear:



- Check the box next to each batch you want to commit. To select all of the batches, click **Select All.** To clear all the check boxes, click **Unselect All.**
- When the batches are selected, click **Commit.** The commit confirmation message appears. This may take a few minutes.



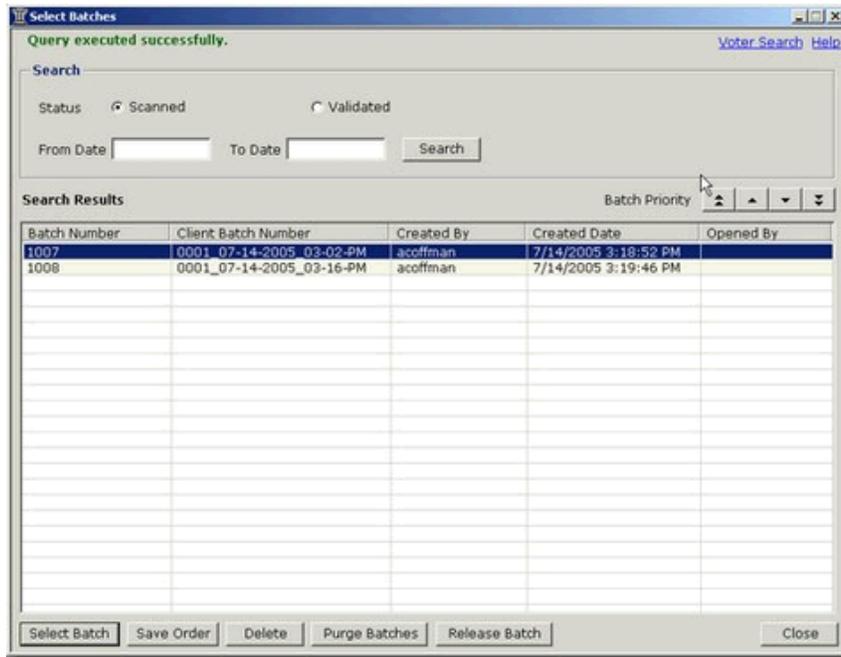
The number displayed after the arrow is the identifying number for this batch.

**Best Practice:** Keep a log of batch ID numbers so you can find individual batches if you are scanning multiple batches at the same time. It is also possible to store batches by Batch ID number so you can easily locate original documents later.

- Click **OK.** The message **Batches Committed Successfully** will appear at the top of the **Commit Batches** prompt.

## Attaching Documents to Records

1. Select “**Voter Registration**” from the main I-VOTERS screen. Click “**Process Batch.**”
2. Highlight the batch you want to attach, and click “**Select Batch.**”



3. The first image from the batch will appear. Go to “**Search**” and find the voter.
4. Make sure that the voter information on the left side of the screen matches the image displayed on the right of the screen. If these don’t match, do not attach the record until you determine the issue.  
  
If you notice any errors on the voter’s record at this point (address not updated correctly, etc.), correct the errors before saving the record.
5. After checking the accuracy and making sure the document is supposed to be attached to the voter’s record on the screen, click “**Save and Next.**” The next image will be brought up. Repeat this process until all of the images have been attached to the correct voters’ records.
6. Once you are done processing the batch, click “**Close Batch.**”

## Office of SCA Search

This search compares voter registration data with the names of people convicted of felonies and identifies possible matches so those registrations can be cancelled.

[§48A.30(1)(d), IAC 721—28.4]

**Best Practice:** Process felons as least once a month.

### Searching Restoration Statuses

1. Select “**Office of SCA Search**” from the main I-VOTERS screen.

2. Search by a person’s name, date of birth, Social Security number, or case ID to see if a person convicted of a felony is showing up as having received a restoration of rights.

The screenshot shows a web application window titled "Office of SCA Search". It features a search form with the following fields: Last Name, First Name, Middle Name, Date of Birth, Last 4 SSN, and Case ID. Below these fields are two sections: "Scope" with radio buttons for "State" and "County" (selected), and a dropdown menu showing "Johnson"; and "Criteria" with radio buttons for "Restored", "Active", and "Both" (selected). There are "Search" and "Clear" buttons to the right of the criteria. Below the form is a table with the following headers: Name, Date of Birth, SSN, Case ID, County, Restored, and Restoration Date. The table is currently empty.

The “**Restored**” column will display a “**Y**” if the person’s rights have been restored. It will display an “**N**” if the person’s rights have not been restored.

#### **Important Notes:**

When a person’s rights have been restored by the governor or president, do not make the person’s registration status “Active.” The person must first complete a new voter registration form to re-register to vote.

Restorations are entered by the SOS monthly as notices are received from the Governor’s Office, so very recent restorations may not be reflected on this screen. Contact the Governor’s Office with restoration questions.

## Processing Felons

1. Select “**Office of SCA Search**” from the main I-VOTERS screen.
2. Select the “**Tasks**” menu and select the “**Process Felons.**”
3. A list of potential felon records matches may appear.

The data displayed under “**Felon Record**” is a felony conviction record that the system has identified as a possible match to a registered voter in your county. The registered voter identified as a possible match is displayed below.

4. Compare the information and make the determination as to whether this is the same person. Click on the “**Voter Summary**” button to view more information about the voter that may help in making this determination.
5. Cancel the voter.

Check the box next to the “**Voter ID**” and then select the “**Cancel Selected**” button.

This will automatically cancel the voter’s registration, update the “**Transaction Source**” to “**09 - State Registrar of Voters**” and add a notice of cancellation to the voter correspondence batch in “**Batch Management**” if the correspondence rule is correctly configured in “**System Configuration.**” See the “**Voter Correspondence**” section for more information.

Voter ID	Name	Status	SSN	Date of Birth	Confidence Level
<input checked="" type="checkbox"/> 7500847...	CITIZEN, JOHN A IV	Active		09/09/1899	80

The next possible match will be automatically displayed on the screen.

6. If the voter’s record identified as a possible match does not match the felony conviction record, check the box next to the “**Voter ID**” and then click on the “**Delete - Not a Match**” button.

This will remove that voter as a match for that felon record.

To view the records I-VOTERS has identified as potential matches, use the “**Processing Prev**” or “**Processing Next**” buttons. You may need to use these if you cannot make a determination about a particular record but want to move on to other records to process.

The bottom center of the screen will show you how many possible matches have been identified by the system for your county.

If you have questions about a felony conviction record, call the Help Desk at 1-877-442-7670 (option 1).

## DPH Search

This search compares voter registration data with death records on file with the Iowa Department of Public Health to identify possible matches so deceased voters' records can be cancelled. This search must be performed once every calendar quarter.

[§48A.30(1)(a), 48A.31]

**Recommended Practice:** Process death records at least once a month.

### Searching Death Records

1. Select **“DPH Search”** from the main I-VOTERS screen.
2. Search by a person's name, date of birth, Social Security number, or date of death.

Name	SSN	Date Of Birth	Date Of Death	Gender
------	-----	---------------	---------------	--------

**Important Note:** Death records are added by the SOS monthly, so very recent deaths may not be reflected on this screen.

### Processing Death Records

1. Select **“DPH Search”** from the main I-VOTERS screen.
2. Select the **“Tasks”** menu and select **“Process Deceased.”**

A list of death records potentially matching registered voters in the user's county will appear under **“Deceased Record.”**

Voter ID	Name	Status	SSN	Date of Birth	Gender	Confid
<input type="checkbox"/> 111222	VOTER, VINCENT	Inactive		09/09/1899	Male	100



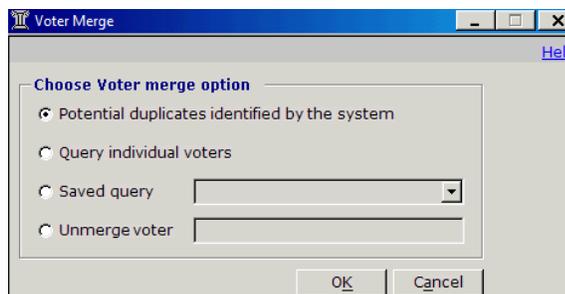
## Duplicate Records Search (Voter Merge)

This searches voter registration records statewide to identify potential duplicate records. For example, a voter who is active in your county may have had a cancelled record in another county that was missed when the voter was initially registered in your county.

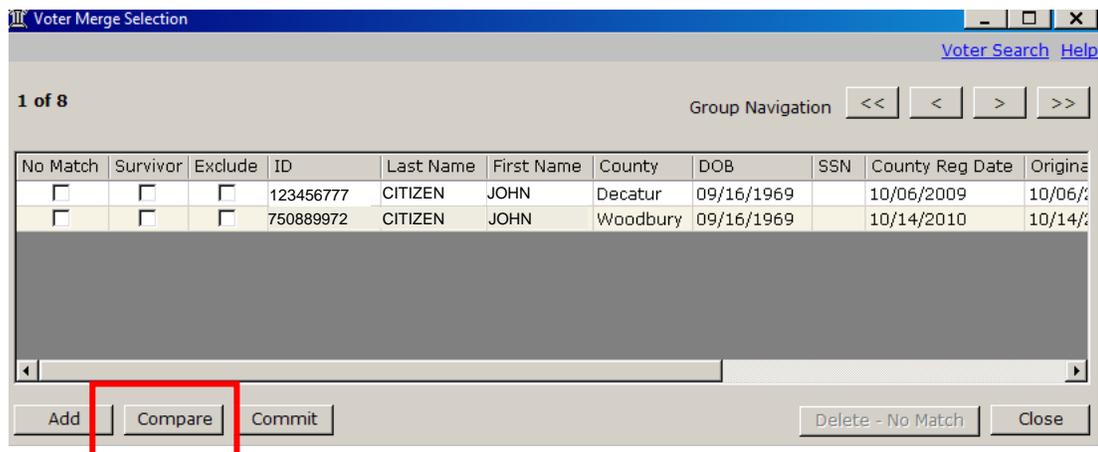
Perform this search at least once each calendar quarter.

[IAC 721—28.3]

1. Select **“Voter Merge”** from the main I-VOTERS screen.
2. The first option **“Potential duplicates identified by the system”** is the default. Select **“OK.”**



3. A new window showing potential duplicates will appear:



The number in the upper left corner shows how many potential duplicates the system has identified for your county.

4. Use the scroll bar to scroll to the right to examine all of the information before making a determination as to whether this is the same voter. The **“Compare”** button can be used to examine records side by side.

- If you have examined the data and determined that the records shown are for the same person, determine which county has the most recent activity (if both records are not from your county). Look at both the **“County Reg Date”** and the **Original Reg Date”** to check this.

Most Recent Activity in Another County

Leave the record unprocessed and move on to processing other merges.

Most Recent Activity in Your County

- Check the box for **“Survivor”** for the record in your county.

The term **“Survivor”** means the record that will remain (“survive”) after the merge is complete. Choose the record you want to keep as the main record as the **“Survivor.”**

- Click **“Compare.”** A side-by-side comparison screen will appear.

The screenshot shows a 'Merge Comparison' window with two columns: 'Survivor' and 'Potential Duplicate'. Each column contains fields for Name, Date of Birth, SSN, Driver License, Residential Address, and Signature. Below these are tabs for 'Mailing Address', 'Registration', 'Absentee Address', 'Misc Inf', 'Moving History', 'Contacts', and 'Alternate Names'. The 'Registration' tab is active, showing fields for Party, Status, Reason, County Reg Date, State Reg Date, Old Voter ID, Last Vote Date, Confidential, and Last Update Date. At the bottom are buttons for 'Exclude', 'Mark As Survivor', and 'Close'.

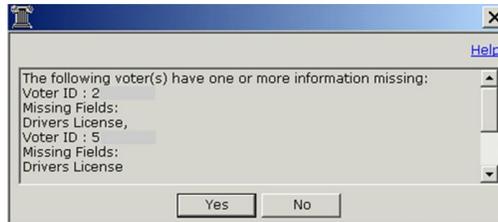
Field	Survivor (Voter ID: 123456777)	Potential Duplicate (Voter ID: 750889972)
Name	JOHN A. CITIZEN IV	JOHN Q. CITIZEN JR
Date of Birth	09/09/1899	09/09/1899
SSN		
Driver License	123AB4568	865BA4321
Residential Address	123A N MAIN ST APT 7 NORTH LIBERTY, IA 52317	555 GENERIC ST SOMEWHERE, IA 55555
Signature		
Party	No Party	No Party
Status	Active	Active
Reason		
County Reg Date	10/26/2007	04/16/2004
State Reg Date	10/26/2007	04/16/2004
Old Voter ID		
Last Vote Date	11/06/2007	
Confidential	None	None
Last Update Date	12/14/2007	04/28/2004

In this example, the comparison screen shows two indications that the voters are *not* duplicates: the driver’s licenses numbers, middle initials, and suffixes are different.

- After you have determined if you are looking at a duplicate record, click **“Close.”**
- If the records are not for the same person, check the box(es) **“No Match”** for the non-matching records and click **“Delete – No Match.”**

8. If the records should be merged, be sure the “**Survivor**” box is checked for the record you want to keep. Click “**Commit.**”

9. Click “**Yes.**”

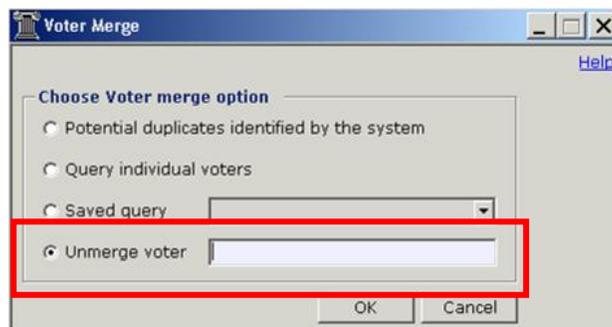


10. If the merge was successfully completed, a “**Voter Merge Completed Successfully**” message will appear.

11. If not, you will receive a message that the merge was unsuccessful. If the message states one or more of the records are part of a previous merge, the existing records must be unmerged before all the records can be merged. If the message states another reason, call the I-VOTERS Help Desk 1-877-442-7670, option 1.

To unmerge the records, follow these steps:

- a. Write down the voter ID numbers for the records you wish to merge. Close the “**Voter Merge Selection**” window.
- b. Select “**Voter Merge**” from the main I-VOTERS screen.
- c. Select the “**Unmerge voter**” option. Enter one of the voter ID numbers of the voters you identified to merge. Click “**OK.**”

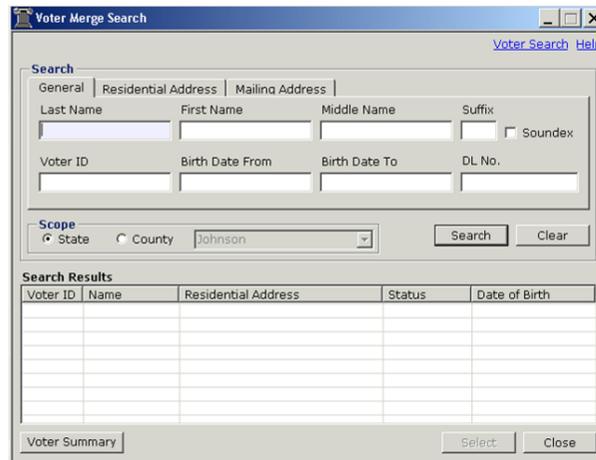


- d. You will get one of the following messages: “**Selected Voter is not part of a merge**” or “**Voter Unmerge Successful.**”

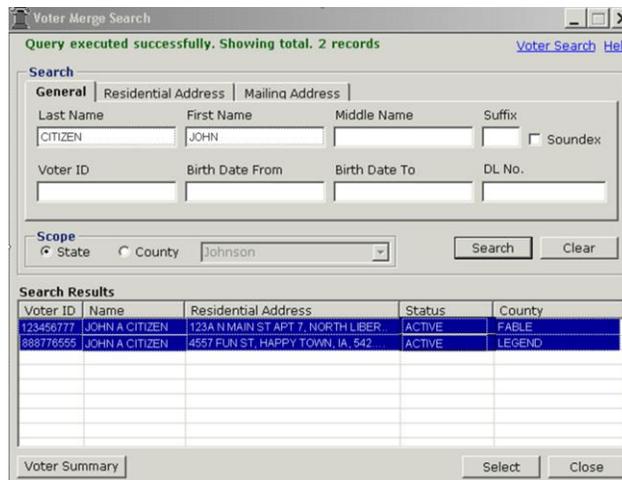
- e. Once you have unmerged the records, choose “**Query individual voters**” which will bring up the “**Voter Merge Selection**” screen. Click “**Add.**”



- f. Enter enough search criteria to find the voter record you want to merge. Use the “%” sign as a wild card tool. For example, if you suspect that Michael Smith might have another record under Mike Smith, enter “**Mi%**” under the “**First Name**” field.



- g. Once you have found the records you want to merge, select them by highlighting them. Hold down the “**Ctrl**” key and click on all of the records you want to merge. When they are all highlighted, click on the “**Select**” button.



- h. Select the “**Survivor**” by checking the box in the “**Survivor**” field. When you are ready to merge the records, click “**Commit**.”

The screenshot shows a window titled "Voter Merge Selection" with a table of voter records. The table has the following columns: No Match, Survivor, Exclude, ID, Last Name, First Name, County, DOB, SSN, County Reg Date, and Original. The first row has all checkboxes (No Match, Survivor, Exclude) unchecked. The second row has the Survivor checkbox checked. Below the table are buttons for Add, Compare, Commit, and Close. The Commit button is highlighted with a red box.

No Match	Survivor	Exclude	ID	Last Name	First Name	County	DOB	SSN	County Reg Date	Original
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	123456777	CITIZEN	JOHN	FABLE	09/09/1899		04/16/2004	04/16/2004
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	888778555	CITIZEN	JOHN	LEGEND	09/09/1899		10/26/2007	10/26/2007

## What to do If...?

### Processing Voter Registrations

#### **Voter Registration Form Missing Required Information**

##### Registered in County

If the voter is already registered in your county, accept the updated information as a written notice to the auditor, as long as it is signed.

[§48A.27(2)(a)]

##### Not Registered in County

If the voter is not already registered in your county and did not provide his or her ID number (and failed to indicate “None”), date of birth, gender, address, name, or signature, assign the voter “Incomplete” status with the reason “Registration Incomplete.” Send the voter a notice of incomplete registration and a voter registration form.

If the voter did not provide an ID number or did not sign the registration form, an incomplete registration notification will be added to “Batch Management” if the correspondence rule is configured correctly. See the “Voter Correspondence” section.

If the voter did not provide date of birth, sex, address, or name, a sample notice “Incomplete Registration” is available in the Election Forms Library.

[§48A.11(8), 48A.26(3), 48A.37(2)]

#### **Voter Registration Form with Mailing Address Changes**

##### Mailing Address Provided on Registration Form, No Mailing Address or Different Mailing Address Listed on Registration Record

Enter the mailing address if the voter submitted a registration form with a mailing address listed and it is different than the mailing address currently listed on the registration record or if no mailing address is currently listed on registration record.

##### No Mailing Address Provided on Registration Form, Mailing Address Listed on Registration Record

Remove the mailing address if the voter submitted a registration form with no mailing address listed but a mailing address is currently listed on the registration record.

##### Registration Form Submitted with No Change to Residential and Mailing Addresses

Do not change or remove the mailing address if the voter submitted a registration form with no change to the residential address and mailing address.

[IAC 821—7.1]

## Voter Registration with No Address

You must make a reasonable effort to determine where the notice of incomplete registration should be sent.

**Best Practice:** Use the phone book, student directories, city directories, or other governmental or non-governmental search databases (sometimes a web search works) to which you have access to find an address to use to mail the notice.

If you find an address which appears to be correct, you cannot make the voter “Active” without the voter’s confirmation. Send the voter a notice of incomplete registration and a voter registration form. A sample “Incomplete Registration Form” is available in the Election Forms Library.

**Best Practice:** Make a note on the registration form indicating where the notice was mailed.  
[§48A.26(3)]

### Cannot Find an Address for Voter

Make a note on the registration form indicating that you could not find an address after making a reasonable effort. Store the form for 22 months after the next general election, at which time it may be destroyed if the person never completed the registration process.

[IAC 821—2.8(5)]

To make note of this in the voter’s record in I-VOTERS:

1. Enter “**No Residential Address Provided**” in the address field as a “**Non-Standard Address.**”
2. Choose the courthouse/administration building as the “**Precinct.**”
3. The voter’s status should be “**Incomplete**” with reason “**Registration Incomplete.**”
4. A blank incomplete notice will generate in I-VOTERS that cannot be mailed.

## **Voter Not 18**

### At Least 17 ½ Years Old

A person who is at least 17 ½ years old may register to vote. The person's registration will not be effective until the person reaches 18 years old.

**Exception:** If the voter's 18<sup>th</sup> birthday is after the pre-registration deadline for an upcoming election, the voter's registration effective date must be the day after the election unless the voter votes by absentee ballot or uses election day registration procedures.

[§48A.5(2)(c), 48A.26(9), IAC 821—2.12(4)]

When processing the voter's registration in I-VOTERS:

1. The voter's record will automatically be assigned "**Active**" status.
2. It will also automatically set the "**County Registration**" date and "**Vote Eligible**" date to the day of the voter's 18<sup>th</sup> birthday (unless after the pre-registration deadline).

### Not 17 ½ Years Old

If you receive registration forms from persons who are not 17 ½, send them a notice explaining their registration cannot be processed because they are not 17 ½. The notice should explain that they can register to vote when they are 17 ½. Include a new voter registration form with the notice. A sample notice "Underage Voter Notification" is available in the Election Forms Library.

## **Residential Address Listed Outside the County/State**

If the address listed as the residential address on a voter registration form is in another county in Iowa, send the form to the auditor for that county. It must be forwarded within 48 hours to the correct auditor.

The date of registration is the date the form was received by the first official. The worry-free postmark provision applies even if the form was not properly addressed so the first official should also forward the envelope in which the form arrived.

[§48A.26(8)]

If the residential address listed is not in Iowa, send a letter to the address listed explaining that an out-of-state address was provided on the registration form and that only people who live in Iowa can register and vote in Iowa.

## **Voter Registration Card Mailed to Mailing Address**

If a voter registration card was mailed to a mailing address on a voter's registration record and the card is returned as undeliverable by the post office, remove the mailing address from the voter's registration record. Mail another voter registration card to the voter's residential address. If that card is returned as undeliverable by the post office, make the voter's status "Inactive."

[IAC 821—7.2]

### **Citizenship and/or Age Boxes Unchecked**

Process the form as long as the form is complete in every other way and is signed. By signing the form, the voter is acknowledging that he or she is a U.S. citizen and will be 18 on or before election day. Make the voter's status "Active."

[§48A.26(4)]

### **Citizenship and/or Age Boxes Checked No**

Enter the voter's information in I-VOTERS. Assign the voter the status "Incomplete" with status reason "Registration Incomplete." Send the voter a letter explaining the voter cannot be registered because the voter is not a U.S. citizen or will not be 18 on or before election day.

[§48A.26(5)]

### **Registration Form Not Signed**

If the voter is currently not registered in your county, process the voter with an "Incomplete" status and check the box next to "No Signature."

If the voter is already registered in your county, do not change the voter's status to "Incomplete." Send the voter a new registration form along with a letter explaining the voter must sign the update.

[§48A.11(8), 48A.37(2)]

### **Registration Form Signed POA**

An individual who has power of attorney does not have the authority to sign a voter registration form. Send the voter a letter explaining the voter must sign the form, ask for assistance in signing the form, or having someone sign the form on the voter's behalf as long as it is done in the voter's presence and with the voter's permission. A sample notice "Voter Registration Signed POA" is available in the Election Forms Library.

[§39.3(17), 48A.11(7)]

### **Status "Inactive" with Reason "PRM – Pending – Returned Mail/ Third Party"**

If an "Inactive" voter with reason "Pending – Returned Mail/ Third Party" submits a registration form and the voter's ID still cannot be verified or if the voter submits absentee ballot request, change the voter's status to "Pending." Use the previous pending "Status Reason" found in the voter's audit log.

[§48A.25A(1)(a), 48A.37(2), IAC 821—2.14(3), 2.15(3)]

## I-VOTERS Issues

### Felony Conviction Match Appears When Entering Voter

If a voter is identified as matching a felony record, determine if it is a correct match. Pay attention to the full name and date of birth. (In the screenshot to the right, there is an 80% match between the new registration record and the felony record, but the records are not a match).

Percent	Name	SSN	DOB	County	CaseId
80	JUSTIN MICHAEL SMITH	2541	05/30/1986	Benton	FE-CR009807
80	JUSTIN MICHAEL SMITH	2541	05/30/1986	Benton	FE-CR008815

If you determine the match to be correct:

1. Accept the verification by clicking on **“Yes.”**
2. The voter’s record will automatically be placed on status **“Cancelled”** and with the reason **“Convicted Felon.”**
3. Enter or update the voter’s address information if it is different.
4. Click **“Save.”**

I-VOTERS will generate a cancelled notice to send to the voter. See the “Voter Correspondence” section.

[§48A.30(2), IAC 721—28.4]

Call the Governor’s office at 515-281-5211 with questions about restorations.

### Duplicate Voter Window Appears/Voter is Registered in Another County

If the **“Duplicate Voters”** window appears when entering a voter registration, determine if one of the voters listed on the screen appears to match the registrant you are entering. If one matches:

1. Click on the listing so it is highlighted and click **“Select.”**
2. Update the voter’s registration address. Click **“Save.”**

If you discover the voter’s record after registering the voter in your county, merge the records together. See the “Duplicate Records Search” section.

### Voter Previously Cancelled

If the voter was previously registered in the state and is currently cancelled, confirm the correct **“County Registration”** and **“Vote Eligible”** dates are listed when processing the voter’s new registration. If the voter was previously cancelled in your county, these dates will not update automatically. These dates should be the date the new registration was received in the auditor’s office or the date it was completed at the DOT or other agency.

[IAC 821—2.12(3)]

## DOT Registration with Driver's License that Won't Verify

1. Verify the driver's license number at the Iowa Interactive website: <http://www.iowaccess.net/iowadlr>.
2. If the driver's license number can be verified there, add the date verified in the "Last Verified" field under the "Misc. Info" tab.
3. In the "Comments" field, enter: "Driver's License number verified on Iowa Interactive website."



Registration	Misc Info	Custom
Secondary Lang	<input type="text"/>	Last Verified 08/28/2008
Special Assistance	<input type="text"/>	
Ballot Style	NO APPLICABLE ELECTION	
State Reg Date	10/28/2008	Last Upd. Date 04/08/2009
Source of Update	<input type="text"/>	
Audit Comment	<input type="text"/>	
Comments	Training record- not an actual person.	

If the driver's license number cannot be verified, call the Help Desk at 1-877-442-7670.

## Death Records Match

This should not occur. Check to make sure that the voter's information is exactly the same as the information in the death record.

If it is different, do not accept the match by clicking "No" and process the voter normally.

If the information is the same as a death record, contact the SOS immediately.

## Homeless Persons and Non-Standard Addresses

Avoid using a non-standard address whenever possible. Almost all rural route designations have been changed to regular street addresses, so consult with the real estate/mapping staff in your office to see what the address should be or contact the post office to see if they can help. A voter's rural route address may be changed to the street address without any action from the voter upon notice from the post office.

[§48A.27(3)(d)]

If a person is homeless or has some other form of non-standard address (such as an RV home or a mobile home parked in a place that is not a usual street address), determine what precinct and split to which to assign the voter.

1. Choose "Non-Standard" as the address type drop-down under the "Residential" tab.
2. Enter the voter's address (description).
3. Manually select the "Precinct" and the "Split."



Residence	Absentee	History	Contacts	Voting History		
Non-Standard	NCOA	CASS	Migration	Election Worker	HCF	Clear
Address	MOBILE HOME, OLD CAPITOL LAWN					
City/St/Zip	IOWA CITY	IA	52245			
County	JOHNSON	Precinct	Iowa City	Split	IC.0!	
<b>Mailing</b>						
Country	UNITED STATES OF AMERICA <input type="checkbox"/> USA Clear					
Address	<input type="text"/>					
City/St/Zip	<input type="text"/>					

## Verification Problems

### **ID Will Not Verify**

A variety of things can cause ID numbers not to verify either with the automated process in I-VOTERS or manually on the Iowa Interactive website.

- Double check to make sure the information is entered correctly.
- If the person's name begins with "Mc" or "Mac," try entering the name as "Mc-" or "Mac" (e.g. "Mc-Donald" instead of "McDonald").
- If the person has a hyphenated last name, try using only one of the names to see if that will work (e.g. "Tina Smith-Johnson," try either "Smith" or "Johnson" for the last name).
- Some people with Hispanic last names may have two last names, and those last names may or may not be hyphenated. Some people do not have traditional "middle names," so what looks like a middle name may actually be part of the person's last name. For example, Juan Alvarez Flores' last name might be listed as "Alvarez-Flores," "Alvarez Flores" or just "Alvarez" or just "Flores." Try all of these combinations.
- If the voter provided a phone number or email, contact the voter and ask the voter to confirm the spelling of the voter's name on the Social Security card. Most of the time, an error is caused by a typographical error made by the Social Security Administration. The voter may need to contact the Social Security Administration to correct errors.

If the voter's ID number, name, and date of birth (month, day, and year) do not match, assign the voter a status of "**Pending**," and send the voter a notification. Voters on "**Pending**" status will have to show ID when voting for the first time in the county.

[§48A.25A(1)(a), 48A.37(2), IAC 821—2.12(3), 2.15(3)]

I-VOTERS will generate a notice to send to the voter if the correspondence rule is configured correctly. See the "Voter Correspondence" section.

### Absentee Voter at Counter/Satellite

Ask the voter to show an acceptable form of identification listed in §48A.8. Change the voter's status to "Active" if the voter shows ID.

If the voter cannot show ID, treat the voter's absentee ballot as a provisional ballot. The voter must send in a copy of an ID or bring one to the office before the ASVP board meets to consider provisional ballots or the ballot will be rejected. See the Absentee Voting chapter for more information.

[§48A.8, 49.81]

### Voter at Counter, Not Casting an Absentee Ballot

Assign voters a status of "Active" upon seeing the voter's identification as listed in §48A.8 or upon verification of the ID number provided by the voter.

### **Voter Move Notifications**

If you receive a notification from another state that a voter registered to vote there, cancel the voter's registration in your county. Use transaction source "10 – Moved Out of Jurisdiction" and reason "10 – Moved Out of Jurisdiction."

[§48A.30(1)(b)]

### **Fraud is Suspected**

If you suspect that any information on a voter registration form is fraudulent or believe that any criminal activity is taking place, contact the SOS and the county attorney.

### **Checked Voting Rights Not Restored and Not a Felony Conviction Match in SCA Search**

On the voter registration form, if a registrant checked "no" in response to the question "Have your rights been restored?" and the voter does not match a felony conviction record that has not been restored in Office of SCA Search, process the registration application. Send the voter a registration card along with the notice "Checked Voting Rights Are Not Restored" available in the Election Forms Library.

## I-VOTERS Instructions

### New County Registrant Before Pre-Registration Deadline

1. Open “**Voter Registration**” from the main I-VOTERS screen.
2. Click “**New.**”

The screenshot shows the I-VOTERS registration form with the following fields and values:

Voter ID	Driver License	SSN	Birth Date	Age	Gender	Last Name	First Name	MI	Suffix
	123AB4567		09/09/1899	109	Male	CITIZEN	JOHN	A	IV

The form also includes sections for Residence, Voter Polling Locations, Election Type, and Mailing, each with various sub-fields and buttons.

3. Enter the registrant’s personal information on the top line.

The cursor is automatically set in the “**Driver License**” field and is ready for the voter’s information to be entered. Enter all information on the first row, tabbing between fields.

**Important Note:** By tabbing, the automatic processes that verify driver’s license numbers and check for potential duplicates, felons, and death records will activate and perform.

- **SSN**

Enter only the last four digits of the Social Security number, even if the voter has provided the full number.

- **Birth Date**

Registrants must be at least 17 ½ years old. I-VOTERS will not save “Active” records for voters whose dates of birth are less than 17 ½ years from the current date.

See “What to Do If” section if the registrant is younger than 17 ½ years old.

- **Suffix**

Enter a suffix only if the person has “Sr., Jr., III, etc.” after his or her last name (e.g. John J. Smith, III). Ms., Mr., Mrs., Dr., Rev., etc. are titles and not suffixes. They should not be entered in this field.

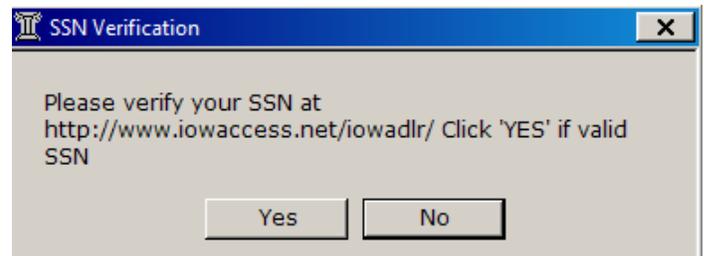
4. Once you tab past the “**Suffix**” field, I-VOTERS will automatically search for any potential matches with other voter registration, felon, or death records. If any matches are brought up, you will need to consider the information presented and decide if it is a match or not.

If one of the voters listed on the screen appears to match the registrant you are entering, click on the match listing so it is highlighted and click “**Select**.” See the “What to do If” section for more information on determining whether there is a match.

If you confirm in the system that the record matches a felony conviction record, I-VOTERS will automatically change the person’s status to “**Cancelled**” and the Reason will be “**CF – Convicted Felon**.” A cancellation notice will be automatically generated and sent to “**Batch Management**” if the correspondence rule is set up correctly. See the “Voter Correspondence” section.

If the voters listed do not match the registrant, click “**No Match**.”

5. If the voter is a new registrant to the state and the voter provided the last four digits of the SSN, verify the voter’s information on the Iowa Interactive website:  
[www.iowaccess.net/iowadlr](http://www.iowaccess.net/iowadlr).



If you do not have a username or password to access to this website, please contact Iowa Interactive at 515-323-3468.

6. Click “**Yes**” after verifying the SSN. If the SSN cannot be verified, click “**No**.”

If the SSN cannot be verified and the voter did not provide a driver’s license number, the voter must be assigned “**Pending**” status.

7. Enter the voter’s address in the “**Residence**” tab. Tab through these fields as well.
8. If I-VOTERS cannot match the address you are entering with the “**Address Library**,” the “**Address Library**” screen will appear.

- **Standard vs. Non-Standard Address**

The drop-down menu beneath the word “**Residence**” automatically defaults to “**Standard**.” Most addresses will be standard addresses.

An address may be entered as “**Non-Standard**” if a voter is homeless or did not provide a residential address. See the “What to do if...” section of this chapter for more information.

- **Suffix**

This suffix field is used if the address has a letter or fraction after the numerical portion of the address (e.g. 123A Main St or 221½ Washington Ave).

- **Unit Type**

If the address contains an apartment number, lot number, room number, etc., enter the type of unit here (e.g. 123 S Main St, Apt 7, enter "APT" in this field).

- **Unnamed Field to the Right of Unit Type**

Enter the number of the unit here (e.g. 123 S Main St, Apt 7, enter "7" here).

- **Mailing**

Enter a voter's mailing address if it is different from the residence address. If the mailing address is outside the United States, see the "Miscellaneous I-VOTERS Instructions" section.

9. Choose the registrant's party affiliation.

Select the party affiliation the voter marked on the registration form. If the voter chose "Green" or "Libertarian," select "**Other**" and then choose "**Iowa Green**" or "**Libertarian**" in the "**Organization**" field.

If the voter did not mark a party affiliation on the registration form, select "**No Party**."

10. Select the "**Transaction Source**."

See the "Transaction Sources, Statuses, and Status Reasons" section for more information.

<b>Registration</b>	Misc Info	Custom
Party	No Party	Organization
Transaction Source		<input type="checkbox"/> DOT Verified
Status	A - Active	<input checked="" type="checkbox"/> SSA Verified
Reason		Verify

11. Select the "**Status**."

See the "Transaction Sources, Statuses, and Status Reasons" section for more information.

**Important Note:** If the voter is at least 17 ½ years old but not 18, I-VOTERS will automatically assign the voter an "**Active**" status. The "**County Registration**" date and the "**Vote Eligible**" date will automatically default to the voter's 18<sup>th</sup> birth date.

12. If that registrant’s status is “**Inactive**,” “**Pending**,” or “**Incomplete**,” choose the “**Reason**” for the status designation.

**Important Note:** If a new registrant does not sign the registration form, assign the registrant a status of “**Incomplete**” with the reason “**Registration Incomplete**” and check the box next to “**No Signature**.”

The screenshot shows a registration form with the following fields and values: Transaction Source: 02 - Mail-in Registration; Status: N - Incomplete; Reason: RI - Registration Incomplete; County Registration: 04/01/2009; and the 'No Signature' checkbox is checked. There are also checkboxes for 'DOT Verified' and 'SSA Verified', and a 'Verify' button.

See the “Transaction Sources, Statuses, and Status Reasons” section for more information.

13. Confirm the “**County Registration**” date.

If the pre-registration deadline has not passed, this should be the date the registration was received in the auditor’s office as long as the voter is 18 years old. For agency or DOT registrations, the date of the registration is the day they were completed at the agency or the DOT if that day was before the pre-registration deadline.

If the voter is 17½, I-VOTERS will automatically assign the “**County Registration**” date and the “**Vote Eligible**” date to the voter’s 18<sup>th</sup> birth date.

If the pre-registration deadline has passed, see the “New County Registrant after Pre-Registration Deadline” instructions in this chapter.

- Check the postmark on all by-mail registrations after the deadline to see if they were postmarked 15 days (the worry-free postmark date) or more before election day. If they were, the date of registration is the worry-free postmark date.

**Important Note:** If the voter was previously registered in the state and is currently cancelled, confirm the correct “**County Registration**” and “**Vote Eligible**” dates are listed when processing the voter’s new registration. If the voter was previously cancelled in your county, these dates will not update automatically. These dates should be the date the new registration was received in the auditor’s office or the date it was completed at the DOT or other agency.

[IAC 821—2.12(3)]

14. Confirm the “**Vote Eligible**” date.

This should default to the same day as the “**County Registration**” date. If it does not, then make it the same as the “**County Registration**” date.

15. Enter the registrant’s home telephone number and email address (if provided) under the “**Contacts**” tab.

The screenshot shows the 'Contacts' tab with a table containing the following information:

Contact Type	Value	Unlisted
Home Phone		<input type="checkbox"/>
Office Phone-		<input type="checkbox"/>
Office Phone-		<input type="checkbox"/>
Cell Phone		<input type="checkbox"/>
Email		<input type="checkbox"/>
Pager		<input type="checkbox"/>
FAX		<input type="checkbox"/>
URL		<input type="checkbox"/>

16. Enter the registrant's previous registration information (if provided).

**Important Note:** If the voter was registered in another county in Iowa, you should have already located their record and moved that record to your county instead of creating a new record. See step 4.

If the voter was registered in another state, this information must be entered so a notice can be sent to that state. This allows the other state to cancel the voter's record and prevents the voter from being registered in more than one place. All notices to other states are sent by the SOS based on "**History**" information entered in I-VOTERS.

Enter previous registration information under the "**History**" tab.

- a. Choose the "**History**" tab. Click "**Add.**"  
The "**Voter Registration – Move History Detail**" box will appear.
- b. Enter the "**County Registration**" date as the effective date.
- c. Enter the information for the voter's previous address. Click "**Add.**"

If the voter used a different name previously, enter that information under "**Alternate Name.**"

17. Click "**Save**" at the top of the voter registration screen. A message will appear indicating the voter's record was successfully saved. I-VOTERS will assign the voter a unique "**Voter ID**" number.

18. Send the registrant an acknowledgment. See the "Voter Correspondence" section for more information.

## **New County Registration After Pre-Registration Deadline, Not Voting Absentee**

These instructions apply when:

- You receive a voter's registration form in the mail after the pre-registration deadline, or
- You receive a voter's registration form from the DOT or an NVRA agency after the pre-registration deadline, or
- A voter who has never been registered in your county or is now cancelled comes to your office and wants to register but not vote by absentee.

Process the form as normal except change to the **"County Registration"** date and **Vote Eligible** date to the day after the upcoming election unless postmarked on or before the worry-free postmark date.

### **Received by Mail After Pre-Registration Deadline**

Check the postmark to see if it was postmarked 15 days (the worry-free postmark date) or more before election day. If it was, the **"County Registration"** date and **"Vote Eligible"** date are the worry-free postmark date.

If it was postmarked after the worry-free postmark date, the **"County Registration"** date and **Vote Eligible** date are the day after the upcoming election.

### **Received by DOT/Agency After Pre-Registration Deadline**

The **"County Registration"** date and **"Vote Eligible"** date are the day after the upcoming election.

### **Received In-Person After Pre-Registration Deadline**

If received in-person, the **"County Registration"** date and **"Vote Eligible"** date are the day after the upcoming election.

[IAC 821—2.12]

## In-Office/Satellite EDRs After the Pre-Registration Deadline

These instructions apply when:

- A voter who has never been registered in your county comes to your office or a satellite location and wants to register and vote.
- A voter who was previously registered in your county and is now cancelled comes to your office or a satellite location and wants to register and vote.
- A voter wants to vote absentee and his or her record is currently assigned “Incomplete” status.

Follow these steps when registering a voter and issuing the voter an absentee ballot:

1. Ask the voter to fill out the voter registration form contained on the EDR form. Make sure the form is filled out completely.
2. Ask for the voter’s proof of identity and residence.  
[§48A.7A, IAC 721—21.3]
3. If the voter does not have proof of identity and residence, the attestation procedure may be used.
4. Ask the voter to complete the voter’s oath portion on the EDR form.
  - If using an attester, ask the attester to fill out the attester’s oath portion the EDR form.
5. Open “**Voter Registration**” from the main I-VOTERS screen. Click “**New.**”
6. Enter the voter’s information in the appropriate fields. Tab through the key line so I-VOTERS will automatically identify any statewide duplicate matches.

If you get a duplicate match from a different county, select that record. If I-VOTERS does not identify any duplicates in the system, proceed as usual.

- i. Enter the voter’s address.
- j. Choose the appropriate party from the drop-down menu.
- k. Select “**15 – Election Day**” as the “**Transaction Source.**”

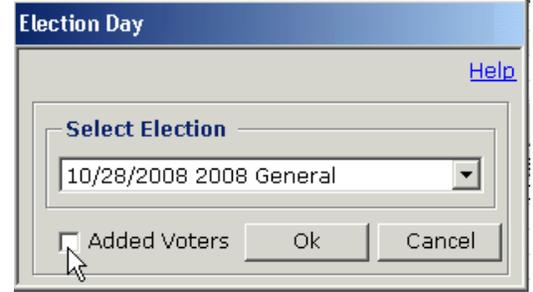


The screenshot shows a portion of the I-VOTERS registration form. It features four dropdown menus with the following values: Party (No Party), Transaction Source (15 - Election Day), Status (A - Active), and Reason (empty). A mouse cursor is visible over the Party dropdown menu.

Party	No Party	Organization
Transaction Source	15 - Election Day	
Status	A - Active	
Reason		

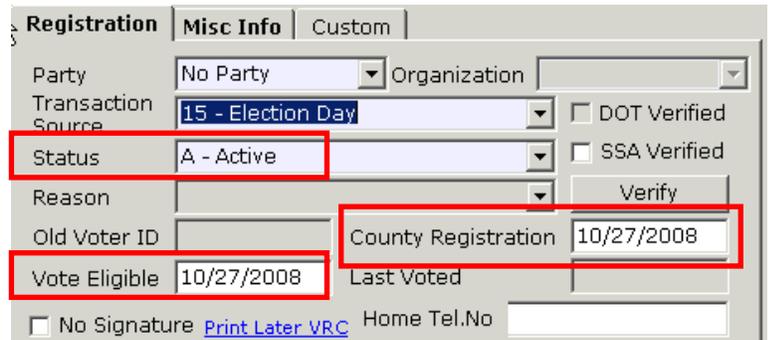
- An **"Election Day"** window will appear. Choose the election.

**Important Note:** Make sure to uncheck the **"Added Voters"** box when processing EDR registrants before election day. This box is only used for voters who vote EDR at the polls. If you do not uncheck the box, it will add them to the election registers as an added voter and you will have difficulty printing your election registers.



- Make sure the voter's status is **"Active."**

**Important Note:** An EDR voter's ID number does not need to be verified. EDR voters should not be placed on "Pending" status because they showed proof of identity at the time of registration.

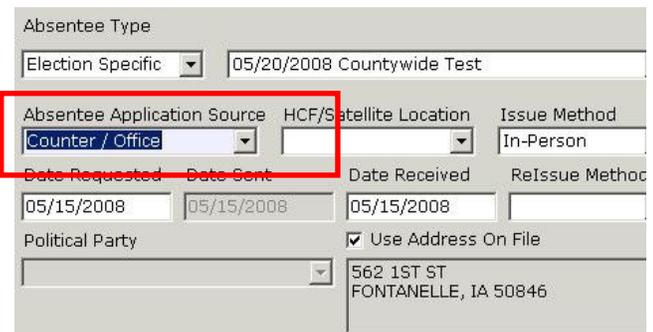


- The **"County Registration"** date and the **"Vote Eligible Date"** will automatically populate to election day for the selected election.

Change the **"County Registration"** date and the **"Vote Eligible"** date to the date the voter appeared in your office or at the satellite location.

- Save the voter's record.

- Enter an absentee request for the voter.



If the voter is in your office, choose **"Counter/Office"** as the **"Absentee Application Source."**

If the voter is at a satellite location, choose **"Satellite"** as the **"Absentee Application Source."**

- Select **"Print Now"** or **"Print Later,"** depending on your county procedures.



13. Attach the voter's EDR form (including a voter registration form and oath form and attester's oath) to the voted ballot affidavit envelope.
  
14. If the ballot is received before 5 p.m. on the Friday before the election (Saturday if for a primary or general election), review the affidavit envelope for completeness and defects according to the procedures in IAC 721—21.354.
  - If there are no defects and the affidavit is complete, store the ballot together with the EDR form in a secure place before delivering to the ASVP board.
  - If there are defects with the voter's affidavit envelope or if the affidavit is incomplete, follow the procedures in IAC 721—21.354 for notifying the voter about fixing the defect or completing the affidavit. Store incomplete and defective affidavit envelopes separate from other affidavits. See the "Absentee Voting" chapter for more information.
  - If the voter's registration card is returned undeliverable by the post office, deliver the absentee ballot and voter registration card to the ASVP board to be challenged pursuant to §53.31(1).

## **EDRs Received At the Polls on Election Day**

After election day, you may have three different types of voters who used EDR procedures at the polling place.

1. Voters who have never been registered to vote in your county, including voters who are currently assigned “Incomplete” status

Process these voters in I-VOTERS using the instructions below.

2. “Cancelled” voters who were previously registered to vote in your county or another county

Process these voters in I-VOTERS using the instructions below.

3. Voters who are already registered to vote in your county who reported a change of address at the polling place on election day

**Important Note:** There is nothing that prevents precinct election officials from using the EDR procedure for voters who are already registered to vote in the county and who are reporting a change of address at the polls on election day, provided the voter has the required identification to use the EDR procedure; however, these registrations should be processed in I-VOTERS as election day updates, not election day registrations. Process these voters in I-VOTERS using the “Within County Moves & Other Updates Received Between the Pre-Registration Deadline and Election Day” instructions. Update the voter’s registration information before giving vote credit in “Election Management > Process Election Register.”

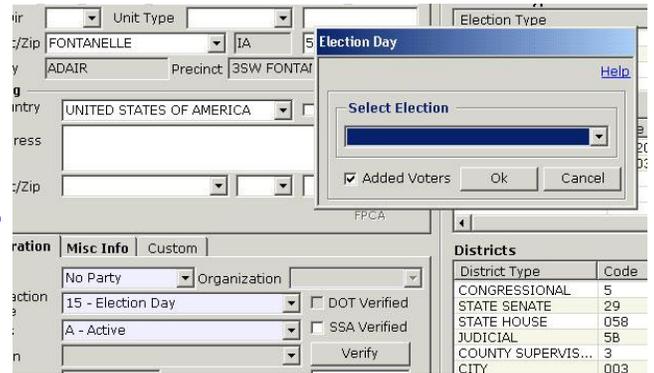
## **New Voters to County, Including Incomplete and Cancelled Voters Previously Registered**

1. Open **“Voter Registration”** from the main I-VOTERS screen. Select **“New.”**
2. Enter the voter’s information in the appropriate fields. Tab through the fields so I-VOTERS will automatically identify any statewide duplicate matches.
  - a. If you get a duplicate match from a different county, select that record and continue with these steps.
  - b. If you get a duplicate match within your county, follow the “Election Day Within County Moves” instructions.
  - c. If I-VOTERS does not identify any duplicates in the system, continue with these steps.
3. Enter the voter’s address.
4. Choose the appropriate party from the drop-down menu

5. Select “15—Election Day” as the “Transaction Source.”

6. The “Election Day” window will appear. Choose the election.

7. If you leave the “Added Voters” checkbox marked, the voter will automatically appear in “Election Management > Process Election Register > Process Added Voters” for the precinct where they are now registered to vote. They will also be added to the end of the election register proof for that precinct.



8. Make sure the voter’s status is “Active.” Verify the “County Registration” date and the “Vote Eligible” date are the date of the election.

**Important Note:** An EDR voter’s ID number does not need to be verified. EDR voters should not be placed on “Pending” status because they showed proof of identity at the time of registration.

9. Save the voter’s record.

## Election Day Within County Moves

1. Open **"Voter Search"** from the main I-VOTERS screen.
2. Search for the voter's record.
3. Follow the same procedures for as when entering new voter registration records, except that it is not necessary to verify the voter's driver's license number or Social Security number after that information has been verified once in your county.
4. Choose **"7- In Person/Registration Drive"** as the **"Transaction Source."**
5. If the registration form is a true duplicate with no changes, mark **"Duplicate Registration Received"** under the **"Misc"** tab.

The screenshot shows a software interface for voter registration. The 'Misc Info' tab is selected. The 'Source of Update' dropdown menu is open, showing several options: Administrative, Attached Image, Cancelled Registration, Clerical Error Correction, Duplicate Registration Received (highlighted), New Registration, and Registration Updated. Other fields visible include Secondary Lang, Special Assistance, Ballot Style (NO APPLICABLE ELECTION), State Reg Date (09/09/2002), Last Upd. Date (11/18/2011), and Last Verified (04/22/2011).

6. When you are finished updating the record, click **"Save."** Make note of the voter's ID number to use to give the voter vote credit.
7. Send an acknowledgement to the voter. See the "Voter Correspondence" section for more information.

See the Post Election Day chapter for instructions on giving the voter vote credit.

## Within County Moves & Other Updates Received Between the Pre-Registration Deadline and Election Day

1. Open **"Voter Search"** from the main I-VOTERS screen.
2. Search for the voter's record.
3. Follow the same procedures for as when entering new records, except that it is not necessary to verify the voter's driver's license number or Social Security number after that information has been verified once in your county.

Choose the transaction source that best fits the update (i.e. **"By Mail"** if the update was received by mail, **"In-Person"** if received in person, etc.). See the "Transaction Sources, Statuses, and Status Reasons" section for more information.

4. If the registration form is a true duplicate with no changes, mark **"Duplicate Registration Received"** under the **"Misc"** tab.



Registration	Misc Info	Custom
Secondary Lang	<input type="text"/>	Last Verified 04/22/2011
Special Assistance	<input type="text"/>	
Ballot Style	NO APPLICABLE ELECTION	
State Reg Date	09/09/2002	Last Upd. Date 11/18/2011
Source of Update	Administrative	
Audit Comment	<input type="text"/>	
Comments	DOT AU	

5. When you are finished updating the record, click **"Save."**
6. Send an acknowledgement to the voter. See the "Voter Correspondence" section for more information.

## Entering Registration Mailing Addresses

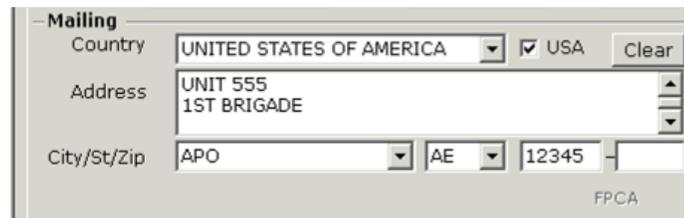
1. In the **“Mailing”** address section, select the name of the country from the **“Country”** drop-down.
2. In the **“Address”** field, enter the address exactly as it appears on the registration form. To enter more than one line of information, press the **“Ctrl”** key and hit **“Enter”** on your keyboard.



The screenshot shows a form titled "Mailing". The "Country" dropdown menu is set to "GERMANY FEDERAL REPUBLIC". To the right of the dropdown is a checkbox labeled "USA" which is unchecked, and a "Clear" button. The "Address" field contains two lines of text: "123A N HAUPTSTRAÙE" and "71325 FREIHEIT VON NORD". At the bottom right of the form is the label "FPCA".

**Important Notes:** If a UOCAVA voter provided a mailing address on the FPCA, you must enter the mailing address as the voter registration mailing address and absentee ballot mailing address.

If the voter has an FPO/APO address, leave United States as the **“Country”** and use **“FPO”** or **“APO”** as the city and **“AE,” “AP,”** or **“AA”** as the state.



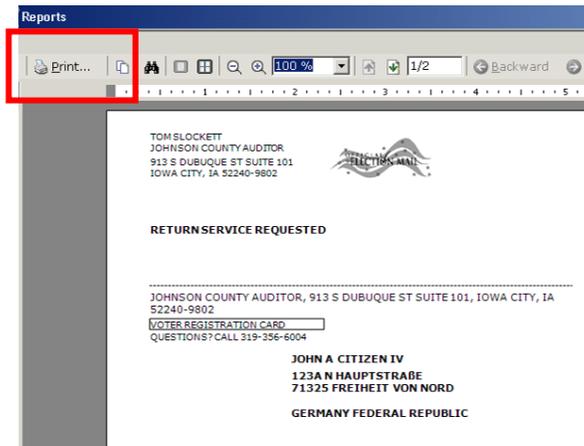
The screenshot shows a form titled "Mailing". The "Country" dropdown menu is set to "UNITED STATES OF AMERICA". To the right of the dropdown is a checked checkbox labeled "USA" and a "Clear" button. The "Address" field contains two lines of text: "UNIT 555" and "1ST BRIGADE". The "City/St/Zip" section has three dropdown menus: the first is set to "APO", the second to "AE", and the third contains the zip code "12345". At the bottom right of the form is the label "FPCA".

3. Enter the voter’s contact information, including an email address if it was provided, in the **“Contacts”** tab.
4. Click **“Save”** the voter’s information is entered.
5. Mail the voter an acknowledgment. See the **“Voter Correspondence”** section.

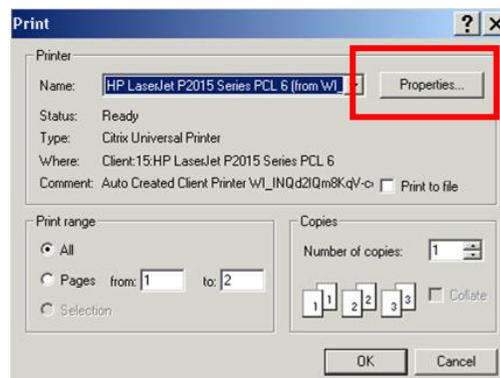
6. If the voter has an international mailing address (not an FPO or APO) address, you must manually print the voter registration card so that special international postage can be applied. To do so:
  - a. Open the voter's record.
  - b. Under "Print," select "Voter Registration Card" then "Print Now."



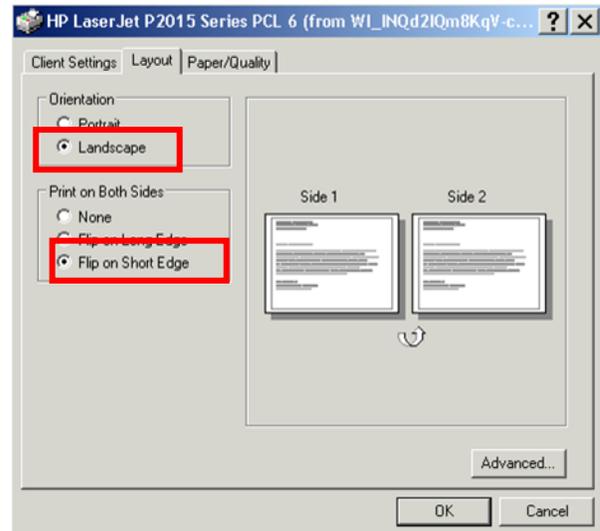
- c. Verify the voter's international address is correctly formatted. Click "Print."



- d. Click "Properties."



- e. Select the “**Layout**” tab. Select “**Landscape**” under “**Orientation**” and “**Flip on Short Edge**” under “**Print on Both Sides**.”
- f. Select the “**Paper/Quality**” tab. Select the tray/paper “**Source**” for your printer. Select “**Cardstock**” for the “**Media**.”
- g. Click “**OK**.” The card should print.
- h. Calculate the correct postage. To determine international rates, visit: <http://ircalc.usps.gov>.



## Correspondence Rules

### Adding a Correspondence Rule

1. Open **“System Configuration”** from the main I-VOTERS screen.
2. Select **“Voter Record”** then **“Correspondence.”**
3. Click **“New.”**



4. Select the **“Correspondence,” “Audit Types,” “Voter Status,”** and **“Voter Status Reason”** (if applicable) from the drop-down menus.
5. Click **“Save.”** Your selection will be added to the list and will generate the correspondence indicated.

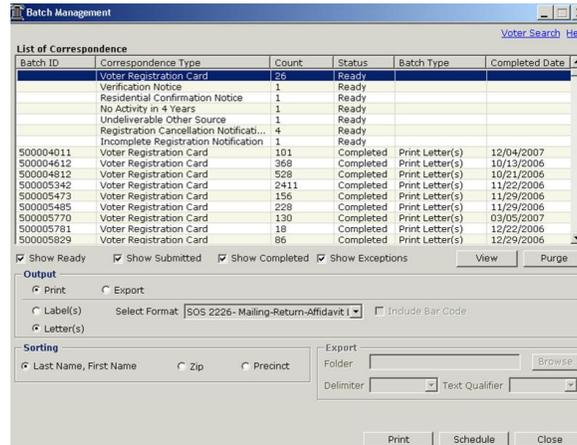
### Deleting a Correspondence Rule

1. Open **“System Configuration”** from the main I-VOTERS screen.
2. Select **“Voter Record”** then **“Correspondence.”**
3. Highlight the type of correspondence you want to delete in the list by clicking on it.
4. Click **“Delete.”**

## Printing Correspondence

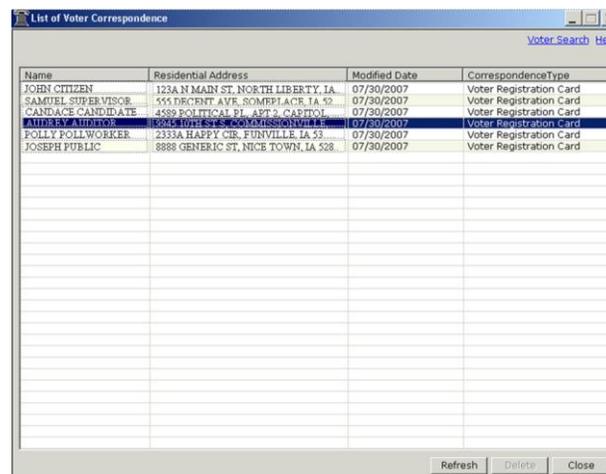
1. Open **“Batch Management”** from the main I-VOTERS screen.

A list of batches of correspondence generated by I-VOTERS will appear. The batches that have not been printed will appear first on the screen and will not have a **“Batch ID”** assigned.



2. Before printing a batch, you can view the voters included the batch. Highlight the batch you want to view by clicking on it. Click **“View.”**
3. To delete an individual record from the batch, highlight the voter’s record by click on it. Click **“Delete.”**

Deleting correspondence from this module will not delete the audit log entry on the voter’s record reflecting that a correspondence was generated. There will not be a **“Correspondence printed/extracted”** audit log entry when the record is deleted from this list before printing.

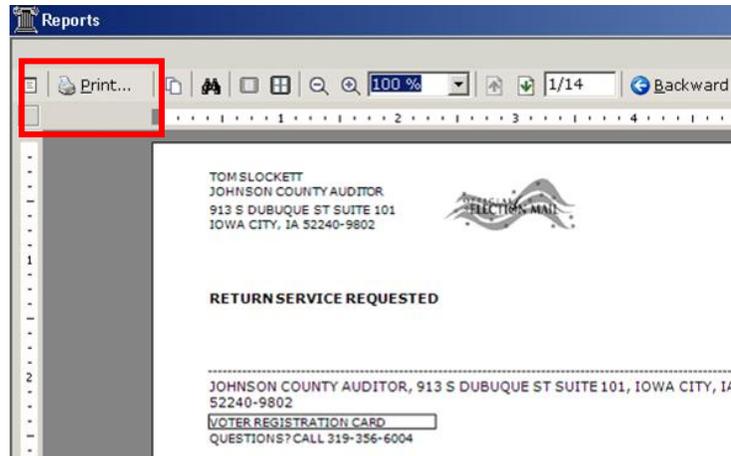


4. To print a batch, highlight the batch by clicking on it. Click **“Print.”**

5. Click **“Yes.”**

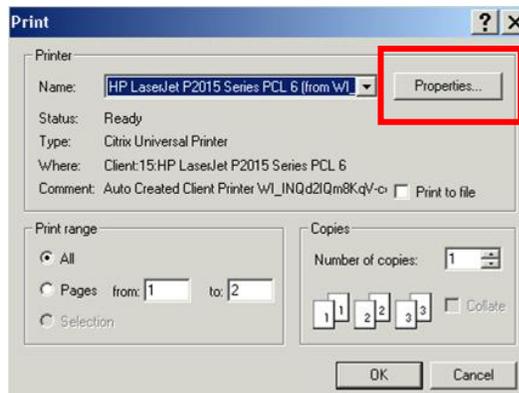


6. A print preview screen will generate. Click **“Print.”**

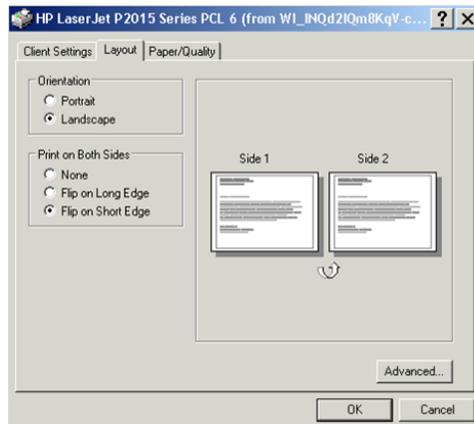


Most correspondences print on a standard 8”x11” letter format. Voter registration cards, residential confirmation notices, and No Activity in 4 Year notices must be printed double-sided on cardstock. See instructions below for printing those correspondences.

7. After you click **“Print,”** click **“Properties.”**



8. Choose the **“Layout”** tab. Select **“Landscape”** as the **“Orientation”** and **“Flip on Short Edge”** under **“Print on Both Sides.”**



9. Click **“OK.”**

## **Generating Voter Lists**

There are multiple ways to generate a voter list.

### **Vote History List Export (EX-004)**

This export allows you to choose multiple elections, precincts and districts from which to pull voters. The export will show which voting method the voters used to vote (i.e. polling place “P” or absentee “A”).

This export will only pull voter information from one county at a time. If you need to pull voters from a city or school district that crosses county boundaries, you must generate this list multiple times, once for each county. You may also generate a list using “Voter Search.” See the “Voter Search” list explanation in this section.

This export will pull all voters in the precinct(s) or district(s) selected even if the voters did not vote in the selected election(s). You may need to sort out the voters who did not vote from the list using Excel before providing the list to the requestor, depending on the list request specifications.

To generate this export:

1. Open “**Reports & Labels**” from the main I-VOTERS screen.
2. Select “**Voter Registration.**”
3. Choose export “**EX-004.**”
4. Choose the precinct(s) or district(s).
5. Choose the election(s).
6. Select the box “**All**” for “**Party**” and “**Party Org.**”
7. Select the “**Statuses**” to include.
8. Browse for the location to save the export. Click “**Export.**”

## Vote History for Last Five Elections of Every Type (EX-005)

This export generates a list of voters from selected precincts or districts. The list shows the voters' vote history and voting methods for the last five elections of every type (i.e. last five primary elections, last five general elections, last five city elections, etc.).

To generate this export:

1. Open "**Reports & Labels**" from the main I-VOTERS screen.
2. Select "**Voter Registration.**"
3. Choose export "**EX-005.**"
4. Choose the precinct(s) or district(s).
5. Select the box "**All**" for "**Party**" and "**Party Org.**"
6. Select the "**Statuses**" to include.
7. Browse for the location to save the export. . Select the "**C\$ Client**" drive and then the I-VOTERS folder. If you do not have an I-VOTERS folder, call the I-VOTERS Help Desk Line (1-877-442-7670).
8. Click "**Export.**"

## Registered Voter List Export

This export generates a list of all registered voters in selected precincts or districts in your county. To generate this export:

1. Open "**Reports & Labels**" from the main I-VOTERS screen.
2. Select "**Voter Registration.**"
3. Choose export "**EX-003.**"
4. Choose the precinct(s) or district(s).
5. Select the box "**All**" for "**Party**" and "**Party Org.**"
6. Select the "**Statuses**" to include.
7. Browse for the location to save the export. . Select the "**C\$ Client**" drive and then the I-VOTERS folder. If you do not have an I-VOTERS folder, call the I-VOTERS Help Desk Line (1-877-442-7670).
8. Click "**Export.**"

## Voter Search

“Voter Search” is helpful when you need to generate a custom list.

1. Open “**Voter Search**” from the main I-VOTERS screen.
2. Select the search criteria using the various tabs.

If you have selected a district which includes multiple counties and you wish to pull information for those voters, be sure to choose “**State**” as your search scope instead of your county only.

The screenshot shows the 'Voter Search' interface. At the top, there is a 'Select Saved/Published Search' dropdown and a 'Run Search' button. Below this are several tabs: Name, Absentee/Provisional, Absentee Details, Residence Address, Mailing Address, Save, Export, Districts, Precincts, Status, Output, Activity, Comment, Political Parties, and Custom Fields. The 'Output' tab is currently selected. The search criteria section includes fields for Election Type, Election Date, Registration Source, Election, State Registration Date (From/To), Last Update Date (From/To), Last Vote Date (From/To), Vote Eligible Date (From/To), and County Reg Date (From/To). A red box highlights the 'Scope' section, which has radio buttons for 'State' and 'County', and a dropdown menu currently set to 'Lee'. Other buttons include 'Show Signatures', 'Search', 'Voter Count', and 'Clear'.

Election participation information and date ranges are available under the “**Activity**” tab.

3. Once you have selected your search criteria, click on the “**Output**” tab. You can select additional output fields by checking the boxes next to the fields desired.

You can also modify the output order of the fields. To do so, highlight the field you want to move by clicking on it in the “**Output Order**” column. Use the arrows to move the field up or down.

The screenshot shows the 'Output Fields' selection window. It contains a list of fields with checkboxes: ZIP (MA), Country (MA), Other, Status, Driver License, Registration Da, Last Vote Date, Last Update Da, Last 4 SSN, and Home Phone. The 'Last 4 SSN' field is highlighted with a blue selection bar.

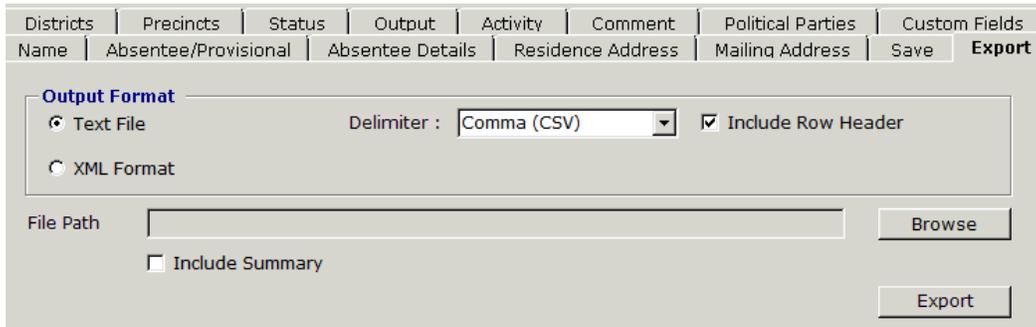
To modify the sorting order of the fields, check the boxes next to the fields you wish to sort by in the “**Output Order**” column. Those fields will then move to the “**Sorting Order**” column. Use the “**Ascending**” and “**Descending**” check boxes to modify the sorting order.

The screenshot shows the 'Output Order' and 'Sorting Order' configuration window. The 'Output Order' column has a list of fields with checkboxes: Last Name, First Name, Middle Name, Name Suffix, Date of Birth, City (RA), Precinct, Split, State (RA), County, and Status. The 'Sorting Order' column has a table with columns for 'Column', 'Ascending', and 'Descending'. The 'Last Name' field is selected in the 'Output Order' column and is also listed in the 'Sorting Order' table with both 'Ascending' and 'Descending' checkboxes checked.

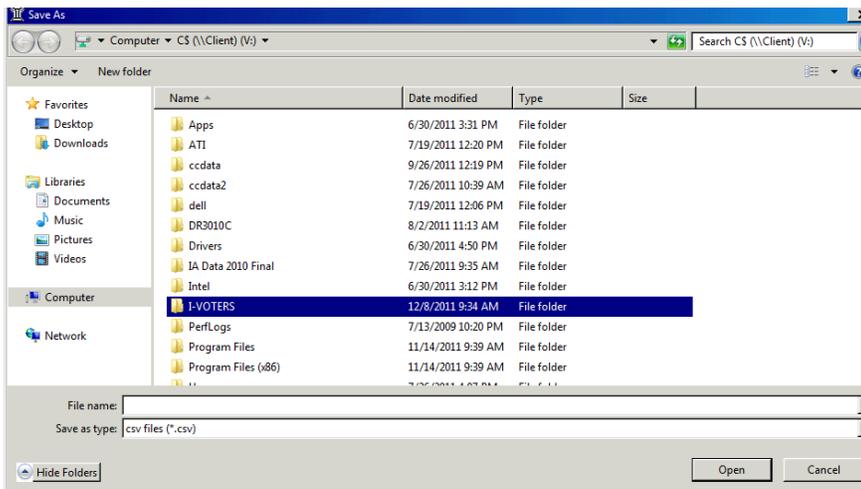
Column	Ascending	Descending
Last Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Middle Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>

4. Click “**Search.**”

5. Select the **“Export”** tab.



6. Choose **“Text File”** as the **“Output File.”** Choose **“Comma (CSV)”** from the **“Delimiter”** drop-down. Check the box next to **“Include Row Header”** so each column of information will be labeled.
7. Click **“Browse”** to choose the location to save the list. Select the **“C\$ Client”** drive and then the I-VOTERS folder. If you do not have an I-VOTERS folder, call the I-VOTERS Help Desk Line (1-877-442-7670).



8. Enter the file name then click **“Save.”**
9. Click **“Export.”** A message indicating the export was successful will appear at the top of the screen.

## **Mailing Labels**

Mailing labels can be generated to provide to candidates. You must use **“Voter Search”** to generate the criteria. Follow the instructions for creating a list in **“Voter Search.”**

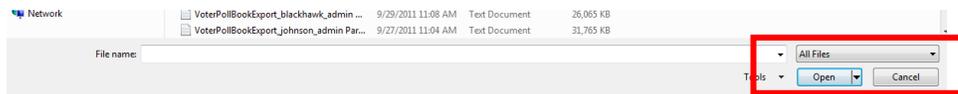
After you have chosen your search criteria and clicked **“Search,”** choose the **“Reports”** drop-down menu. You can generate mailing labels by voter or by household.

The labels will generate as a report which you can save as a .pdf file or .rtf file. If you wish to modify the file in Word, save the report as a .rtf file.

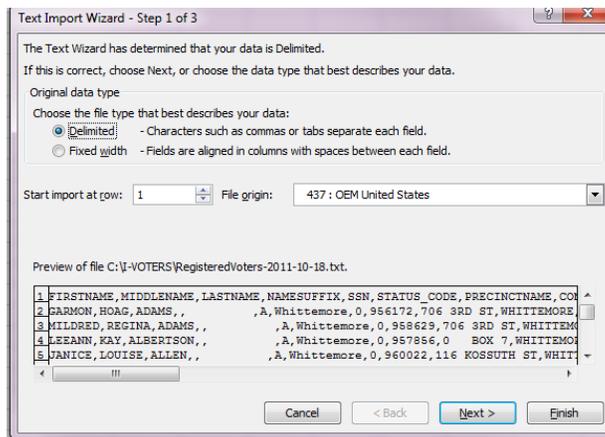
## Opening Exports in Excel

Most lists are exported as text files from I-VOTERS. If you wish to provide the list as an Excel file, you will need to open the file in Excel and save it as an Excel document.

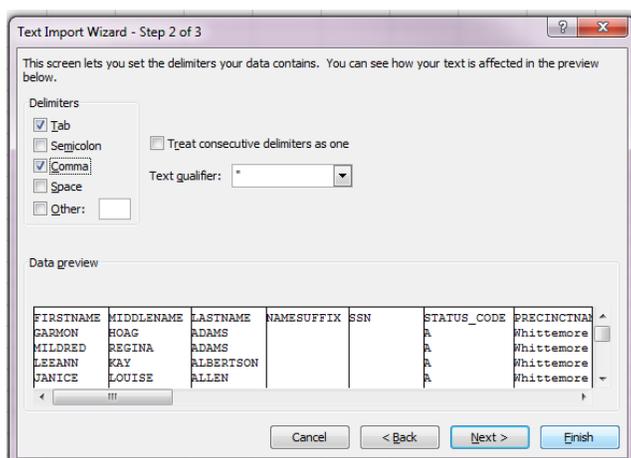
1. Open Excel. From the **“File”** drop-down or the Office button, choose **“Open.”**
2. Browse to your C: Drive and open your I-VOTERS folder. Change the **“File Type”** to **“All Files.”** Find the file you just exported and click **“Open.”**



3. Be sure **“Delimited”** is marked. Click **“Next.”**



4. Be sure the **“Tab”** and **“Comma”** boxes are checked. Click **“Finish.”**



5. To save the file as an .xls document, choose **“Save As”** from the **“File”** or Office button drop-down. Browse for the location where you wish to save the file. Change the file type from the **“Save As Type”** drop-down to **“Excel Workbook”** or **“Excel 97-2003 Workbook.”** Click **“Save.”**

## Modifying the Address Library

### Adding an Address Range

1. Click on **“Address Library”** from the main I-VOTERS screen. Click on **“New”** at the bottom of the **“Address Library”** screen.

2. The **“New Address Library”** screen will appear.

3. Enter the address range information. Follow these guidelines:

- **House# From, House# To, & Type**

Enter a house number range. The selection of **“Odd,” “Even,”** or **“All”** in the **“Type”** field determine which house numbers must be entered in the **“House#”** fields.

If **“Odd”** is chosen, the **“House#”** ranges can only be odd numbers. If **“Even”** is chosen, the **“House#”** ranges can only be even numbers.

- **Pre-Direction**

Choose a **“Pre-Direction”** from the drop-down list or by typing it in. The pre-direction is a direction indicator in front of the street address. This field is optional.

- **Street Name**

Type the **“Street Name”** in the field. If the street already exists in the address library, be sure to follow the same naming convention (i.e. First Street, not 1st Street). This field is required.

- **Street Type**

Choose a **“Street Type”** from the drop-down list or by typing it in. This field is optional.

- **Post Direction**

Choose a **“Post Direction”** from the drop-down list or by typing it in. The post direction is a direction indicator after the street address. This field is optional.

The screenshot shows the 'New Address Library' window. It contains several input fields and checkboxes. The fields include: 'House# From', 'House# To', 'Type' (with a dropdown arrow), 'Pre Direction', 'Street Name', 'Street Type', 'Post Direction', 'Unit Type', 'Unit# From', 'Unit# To', 'City', 'State', 'Zip', 'Route Number', 'County' (with a dropdown arrow), 'Precinct', 'Split', and 'Voter Counts'. There are also checkboxes for 'Unusable Address', 'Mailing Address Required', 'Unit Required', and 'Health Care Facility [HCF]'. A text field for 'HCF Description' is present. At the bottom, there are buttons for 'Remove', 'Split Lookup', 'Districts List', 'Save', and 'Close'. A 'View Voters' button is also visible near the 'Voter Counts' field.

- **Unit# From, Unit# To, & Unit Type**

Choose the “**Unit Type**” from the drop-down list or by typing it in. Use this for address ranges containing only multi-unit dwellings. Enter the lowest unit number in the “**Unit# From**” field and the highest unit number in the “**Unit# To**” field. These fields are optional.

- **City**

Choose the “**City**” from the drop-down list or by typing it in. This field is required.

- **Zip**

Choose the “**Zip**” from the drop-down list or by typing it in. This field is required.

- **Precinct**

Choose the “**Precinct**” code from the drop-down list or by typing it in. This field is required.

**Important Note:** You cannot add a new precinct from this screen. See the “Creating New Precincts” instructions on page 8.

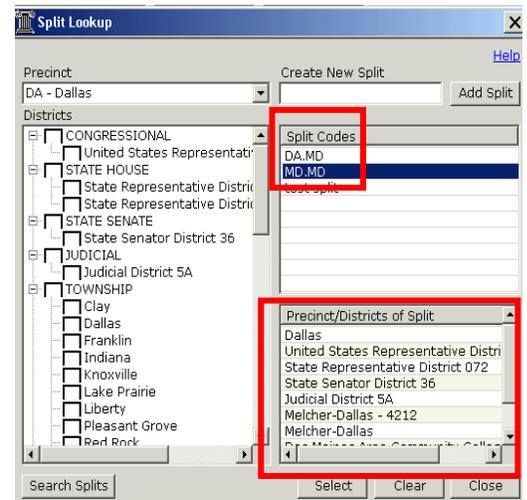
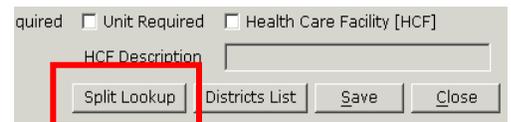
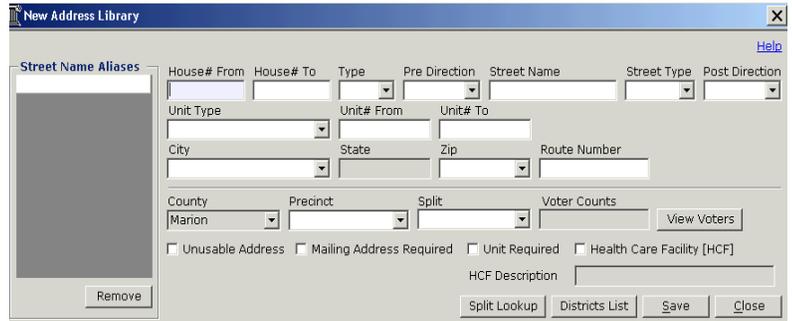
- **Split**

Choose the “**Split**” from the drop-down list or by typing it in. This field is required.

If you are unsure of the split, click on “**Split Lookup.**” From “**Split Lookup**” screen, you can search for the splits by precinct.

You can view the districts within a split by clicking on the split under “**Split Codes.**” The districts will be listed under the “**Precinct/Districts of Split.**”

**Important Note:** Do not add a new split from this screen. This will not check to see if you added all required districts to a split.



The following items are not required but may useful to clarify address ranges.

- **Mailing Address Required**

Check this box if mail is not normally delivered to the physical address within the address range (i.e. a post office box is required to receive mail).

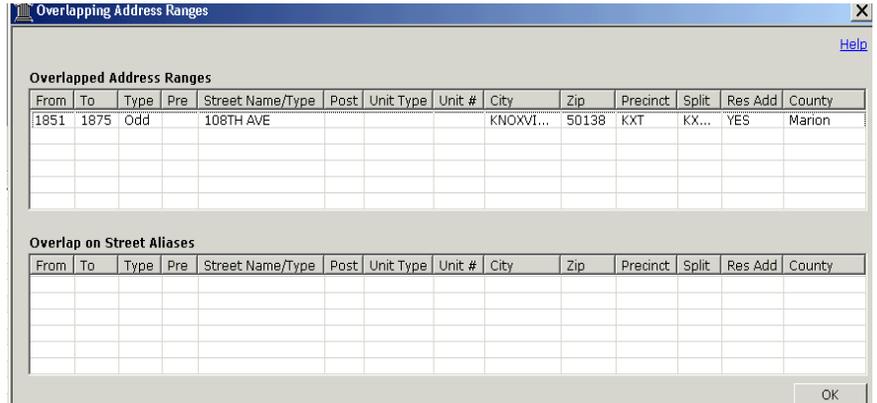
- **Unit Required**

Check this box if the address range has multiple units and the “**Unit#**” is required.

4. Click **“Save”** when you are finished entering the address range information.

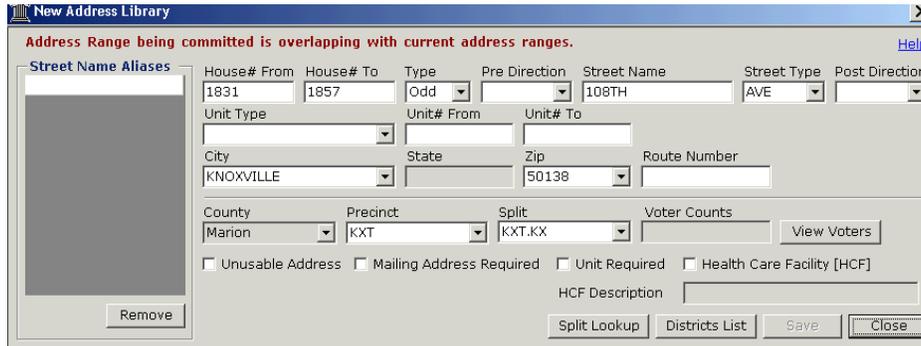
- a. You may get an **“Overlapping Address Range”** message if you entered a new range that overlaps with an existing address range.

This screen will show you the range of address that overlaps with the address range you are trying to create.



- b. Click **“OK.”**

c. The following screen will appear:



- d. Correct the required changes to the address range (usually the **“House# From”** and **“House# To”** fields).

- e. Click **“Save”** when finished. The **“Address Library”** screen will open displaying the new address range.

## Modifying an Address Range

1. Open the “**Address Library**” from the main I-VOTERS screen. Search for the range you wish to modify in the “**Address Library.**”
2. Highlight the range you want to modify by clicking on it. Click “**Detail.**”

The screenshot shows the 'Address Library' window with the following search criteria:

- House# From: [ ] House# To: [ ] Type: [ ] Unit Type: [ ] Unit# From: [ ] Unit# To: [ ]
- Pre Direction: [ ] Street Name: [ ] Street Type: [ ] Post Direction: [ ]
- County: Marion City: [ ] Zip: [ ] Precinct: [ ] Split: [ ]
- Residential Address: All Mailing Address: All Search Street Aliases: [ ] HCF: [ ]

The 'Search Result' table is as follows:

From	To	Type	Pre	Street Name	ST	Post	UType	Unit #	City	Zip	Precinct	Split	Res
101	501	All		1ST	ST	NW			MELCHER	50163	DA	MD....	YES
101	412	All		1ST	ST	SW			MELCHER	50163	DA	MD....	YES
101	403	All		1ST	ST				BUSSEY	50044	LB	BU.TC	YES
101	510	All		1ST	ST	NE			MELCHER	50163	DA	MD....	YES
101	714	All	W	1ST	ST				PELLA	50219	PE4	PE4....	YES
101	750	All		1ST	ST	SE			MELCHER	50163	DA	MD....	YES
107	107	Odd		1ST	ST				HARVEY	50119	CL	HV.KX	YES
202	902	All	S	1ST	ST				KNOXVILLE	50138	KX2	KX2....	YES
205	811	All	N	1ST	ST				KNOXVILLE	50138	KX1	KX1....	YES
215	615	All	E	1ST	ST				PELLA	50219	PE1	PE1....	YES
702	1015	All	E	1ST	ST				PELLA	50219	PE2	PE2....	YES
709	709	Odd		1ST	ST				BUSSEY	50044	LB	BU.TC	YES
805	1435	All	W	1ST	ST				PELLA	50219	PE3	PE3....	YES
814	814	All		1ST	ST	SE			MELCHER	50163	DA	MD....	YES
1009	1009	All		1ST	ST				DALLAS	50062	DA	MD....	YES

The 'Detail' button at the bottom is highlighted with a red box.

3. The “**Edit Address Library**” screen appears. Modify the range details as needed. Click “**Save.**”

The screenshot shows the 'Edit Address Library' window with the following details:

- House# From: 101 House# To: 501 Type: All Pre Direction: [ ] Street Name: 1ST Street Type: ST Post Direction: NW
- Unit Type: [ ] Unit# From: [ ] Unit# To: [ ]
- City: MELCHER State: IA Zip: 50163 Route Number: [ ]
- County: Marion Precinct: DA Split: MD,MD Voter Counts: 51 View Voters: [ ]
- Unusable Address: [ ] Mailing Address Required: [ ] Unit Required: [ ] Health Care Facility (HCF): [ ]
- HCF Description: [ ] Split Lookup: [ ] Districts List: [ ] Save: [ ] Close: [ ]

The 'Save' button at the bottom right is highlighted with a red box.

**Important Note:** You cannot add splits from this screen.

4. The “**Audit Comment**” screen will appear. Enter an audit comment and click “**Save.**” The comment will be added to the audit logs of all voters affected by the change.

## Splitting an Address Range

1. Open the “**Address Library**” from the main I-VOTERS screen. Search for the range you wish to modify.
2. Highlight the range by clicking on it. Select “**Split Address Range**” at the bottom of the screen.

The screenshot shows the 'Address Library' application window. At the top, there are 'Selection Criteria' fields for House# From, House# To, Type, Unit Type, Unit# From, and Unit# To. Below these are fields for Pre Direction, Street Name, Street Type, Post Direction, County, City, Zip, Precinct, and Split. There are also checkboxes for 'Search Street Aliases' and 'HCF'. A 'Search' button and a 'Clear' button are at the bottom right of the criteria section.

The 'Search Result' section shows a table with columns: From, To, Type, Pre, Street Name, ST, Post, UType, Unit #, City, Zip, Precinct, Split, and Res. The first row is highlighted in blue and contains the values: 101, 501, All, 1ST, ST, NW, MELCHER, 50163, DA, MD...., YES.

At the bottom of the window, there is a toolbar with buttons: New, Detail, Delete, Split Address Range (highlighted with a red box), Merge Address Range, Select, Report, and Close.

3. The “**Split Address Range**” screen will appear.

The 'Split Address Range' dialog box is shown. It has a title bar with a close button. Below the title bar is a 'Help' link. The 'Address Range' field contains '101-501' and '1ST ST NW MELCHER 50163'. The 'Type' field contains 'All'. There is a section titled 'Select Split Type' with two radio buttons: 'Split by House Number' (selected) and 'Split by Odd/Even Numbers'. Below this is another section titled 'Address Range' with two sub-sections: 'Address Range #1' with 'From' field '101' and 'To' field empty; and 'Address Range #2' with 'From' field empty and 'To' field '501'. At the bottom are 'Apply' and 'Cancel' buttons.

In the “**Select Split Type**” section, select a split type using the guidelines on the next page.

## Splitting by House Number

- Click on **“Split by House Number.”**
- Enter an ending house number for the first range in the **“To”** column for **“Address Range #1.”**
- Enter a beginning house number for the second range in the **“From”** column for **“Address Range #2.”**
- Click **“Apply.”**

**Split Address Range**

Address Range: 101-501 1ST ST NW MELCHER 50163

Type: All

Select Split Type:

- Split by House Number
- Split by Odd/Even Numbers

Address Range:

	From	To
Address Range #1	101	300
Address Range #2	301	501

Apply Cancel

**Important Note:** The value of the **“To”** range for **“Address Range #1”** and the value of the **“From”** range for **“Address Range #2”** must be within one digit of each other if both ranges are **“All”** or within two digits of each other if one range is **“Even”** and one range is **“Odd.”**

## Splitting by Odd/Even Numbers

Use this if a new district boundary splits the street down the middle.

- Click on **“Split by Odd/Even Numbers.”**
- Click **“Apply.”** The new range will be automatically created by I-VOTERS.

## Merging Two Address Ranges

The two address ranges you want to merge must have the following features in common:

1. Addresses must have the same:
  - Precinct
  - Split
  - City
  - Zip
  - Street name
  - Directional prefix or suffix
  - Street type
  - Mailing address required flag
  - Usable residential address required flag
  - Unit required flag
  
2. Addresses must have continuous house numbers.

### Example 1

The “**Type**” of both street segments must be “**All**” and the “**House# From**” value of one segment must be greater by one than the “**House# To**” value of the other segment.

Address 1: 100 – 199 W. South Street (all)  
Address 2: 200 – 1510 W. South Street (all)

### Example 2

The “**Type**” of both street segments must be the same “**Even**” or “**Odd**” and the “**House# From**” value of one segment must be greater by two than the “**House# To**” value of the other segment.

Address 1: 201 – 699 W. Pleasant Street (odd)  
Address 2: 701 – 1513 W. Pleasant Street (odd)

### Example 3

If the “**Type**” of one street segment is “**Odd**” and the “**Type**” of the segment is “**Even**,” the “**House# From**” and the “**House# To**” values the ranges must be within one digit of each other.

Address 1: 2000 – 3906 E. Main Street (even)  
Address 2: 2001 – 3905 E. Main Street (odd)

1. If your ranges fall under these criteria, search for the ranges you wish to modify.
2. Highlight the ranges by clicking on them while holding down the “Ctrl” key on the keyboard. Click “Merge Address Range” at the bottom of the screen.

**Address Library**

Maintenance Export Voter Search Help

**Selection Criteria**

House# From:  House# To:  Type:  Unit Type:  Unit# From:  Unit# To:

Pre Direction:  Street Name:  Street Type:  Post Direction:

County:  City:  Zip:  Precinct:  Split:

Residential Address:  Mailing Address:   Search Street Aliases  HCF

**Search Result**

Current | Workspace

From	To	Type	Pre	Street Name	ST	Post	UType	Unit #	City	Zip	Precinct	Split	Res
100	199	All	W	PLEASANT	ST				KNOXVILLE	50138	KX1	KX1...	YES
101	1600	All	E	PLEASANT	ST				KNOXVILLE	50138	KX1	KX1...	YES
102	701	All	W	PLEASANT	ST				PLEASANTVILLE	50225	PV/PV	PV/PV	YES
1515	1515	Odd	W	PLEASANT	ST				KNOXVILLE	50138	KX4	KX4...	YES
1526	1554	All		PLEASANT	DR				PELLA	50219	PE3	PE3...	YES
1700	3906	Ev...	E	PLEASANT	ST				KNOXVILLE	50138	KX1	KX1...	YES
1701	3523	Odd	E	PLEASANT	ST				KNOXVILLE	50138	KX1	KX1...	YES
200	1906	Ev...	W	PLEASANT	ST				KNOXVILLE	50138	KX3	KX3...	YES
201	699	Odd	W	PLEASANT	ST				KNOXVILLE	50138	KX1	KX1...	YES
605	706	All		PLEASANT	ST	E			DALLAS	50062	DA	MD...	YES
701	1513	Odd	W	PLEASANT	ST				KNOXVILLE	50138	KX4	KX4...	YES

3. The “Merge Details” screen will appear. This screen shows the address segments before the merge with each voter count and the new address segment after the merge with the new voter count.

**Merge Details** Help

Address Ranges      Voter Count

**Before Merge**

201-699 W PLEASANT ST KNOXVILLE 50138      13

701-1513 W PLEASANT ST KNOXVILLE 50138      19

**After Merge**

201-1513 W PLEASANT ST KNOXVILLE 50138      32

Review the information carefully. Once you are sure the merge is correct, click “Apply.”