

# WISVOTE ADVANCED WEC ELECTION CONFERENCE 2025

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## Participant Guide



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# Welcome!

Thank you for attending today's WisVote training and our first annual election conference. This training is intended to provide a deeper dive into WisVote, beyond the standard training all WisVote users must complete. This is also an opportunity to discuss advanced topics with senior WisVote staff. Feel free to ask questions along the way.

This training will consist of a PowerPoint presentation, a live WisVote demonstration of some presentation topics, and a question-and-answer session at the end. The participant guide provides resources for you to reference that are relevant to the content in the presentation.

We hope you find this training beneficial, and we appreciate you taking the time to attend this breakout session and our conference.

## About WEC

The Wisconsin Elections Commission (WEC) was established in 2016 by the Wisconsin Legislature to carry out a wide range of functions related to statewide elections administration.

The WEC serves as a resource for local clerks by providing them with education, training, and support materials. The agency also fulfills several statewide election responsibilities, such as helping ensure compliance with federal and state election laws, ensuring election accuracy, and maintaining the statewide voter registration database.

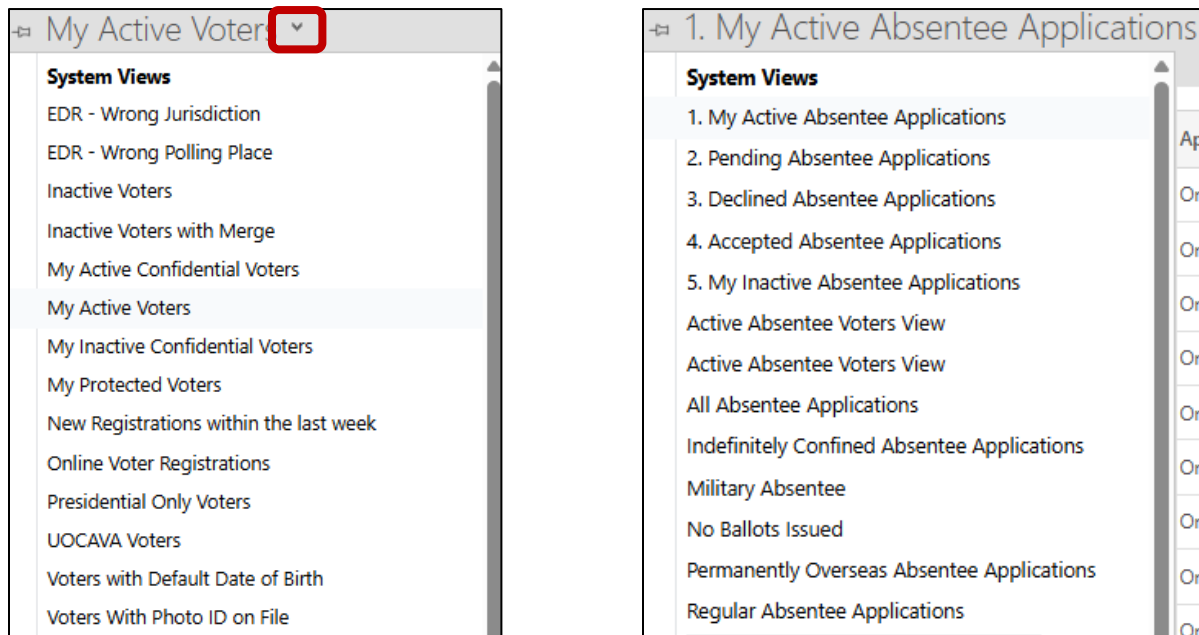
The WEC is governed by six Commissioners, with three Commissioners representing the Democratic Party and three representing the Republican Party. Two of the Democrats and two of the Republicans are selected by their respective Legislative leadership. One Democrat and one Republican must be former municipal or county clerks and are appointed by the governor and confirmed by the Senate.

# WisVote Terms

- **Address tile** – A list of addresses assigned to a specific municipality
- **Advanced Find** – A filter tool that allows for the creation of customized views
- **Canvass** – the process of verifying the totals from election day before certifying the results of an election
- **Canvass Reporting System** – WEC database where county clerks report and certify official election results
- **CRM** – Customer Relationship Management – software designed to organize and track customer data
- **Export** – Download data from a view for access outside of WisVote; often in Excel or PDF format
- **Entity** – a collection of specific record types in WisVote (voter records, absentee applications, etc.)
- **Field** – Data points available in Advanced Find for the selected entity
- **Filter View** – An option in some system views that allow users to display only data matching the selected filter(s)
- **Microsoft CRM** – Microsoft-based software program on which WisVote is built
- **Rules** – the filter limits to be applied to an advanced find value
- **Saved View** – An advanced find filter setup saved in WisVote; can be shared with other WisVote users
- **Sort View** – Rearrange data in a system view based on the column; will order data alphabetically or numerically, toggling between A-Z/High-Low to Z-A/Low-High
- **System View** – A pre-programmed view in WisVote that displays data from the associated entity
- **Values** – The data an advanced find should filter for the associated field
- **Voter List** – A list of voter records found under the Voter List tile in WisVote
- **Voter Search** – A tile in WisVote that allows users to search voter records using more detailed filters; can provide voter records and/or counts
- **WisVote** – Wisconsin's state voter registration and election management database
- **WisVote Reconciliation** – The process where clerks verify voter participation and absentee ballot information have been correctly recorded in WisVote
- **WisVote Reports** – Pre-programmed data queries designed for a specific purpose; absentee labels, poll books, and letters are types of reports

# System Views in WisVote

System views are nothing more than how data is arranged and made available to all WisVote users. All WisVote associated views will have related system views, with some entities having quite a few. Each of these views will present data in a default manner that can then be further sorted or filtered, depending on the user's needs.



Each entity in WisVote will have pre-programmed system views that can be accessed by clicking the down-chevron next to the name of the view.

System views provide the ability for WisVote users to view data and records without needing to set several filters from the base records or default views. This provides users with the ability to quickly view common data points, such as merged voters or indefinitely confined applications. Some data, such as confidential or protected voter records, will only be viewable within the associated system view.

## Sorting & Filtering

Sorting and filtering are two separate functions. All views can be sorted, but not all views can be filtered. At the same time, views that have been filtered can also be sorted.

## Sorting

<input type="checkbox"/>	Name	Voter Type...	Ballot Type	Absentee A...	Descriptio...	Mailing Id...	Date Ballot Se...	USPS Ballot Sta...
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Sorting is done by clicking on a column header. This will automatically sort all records in the view by the data in the selected column. Clicking once will order the data lowest value to highest. Clicking a second time will order the data from highest to lowest. Blank fields (aka Null) are a lower value than zero and so will appear at the top of the first sort. When a column is sorted, a small arrow icon will appear in the sorted column; pointing up for low-to-high and down for high-to-low.

Only one column/field can be sorted at a time. Clicking on a second column will sort the available data by the data associated with the second column only.

Sorting is best used to order data before exporting, attempting to find records that were recently updated, or have blank fields without filtering. A common use would be sorting absentee ballot records by mailing date to find records missing a sent date so they can be updated.

The example below shows how a user sorts by anticipated delivery date to see which records have the most recent date:

Anticipated Delivery Da...	Date Ballot Returne...	Ballot Status Reaso...	Application Ty...
	3/18/2025	Returned	Regular
	3/21/2025	Returned	Regular
	3/20/2025	Returned	Regular
	3/27/2025	Returned	Regular

Unsorted

Column header clicked  
two times

Anticipated Delivery Da...	Date Ballot Returne...	Ballot Status Reaso...	Application Ty...
3/13/2025		Returned	Indefinitely ...
3/13/2025	3/17/2025	Returned	Regular
3/13/2025	3/17/2025	Returned	Indefinitely ...
3/13/2025	3/17/2025	Returned	Regular

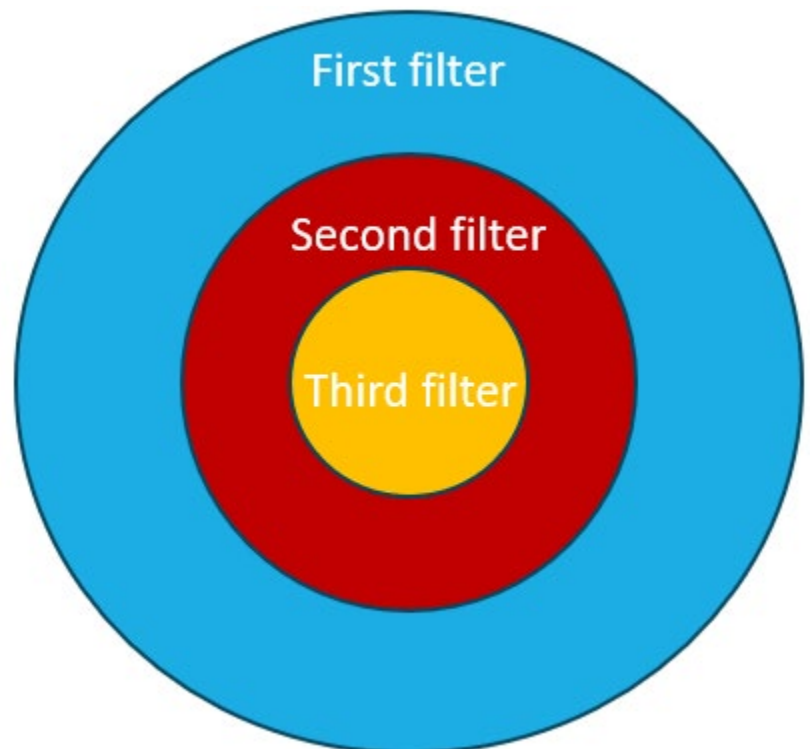
## Filtering

Filtering must be “turned on” before a WisVote user can access any filter options in the current view. The filter option is activated by clicking the black funnel icon located to the far right-hand side of a view’s column headers. Once activated, a down chevron will appear next to each column header title and the filter icon will turn white.



Multiple filters can be active at a time, but only one filter per column. When multiple filters are used, each subsequent filter will apply to the remaining data. It will not refilter the entire data set.

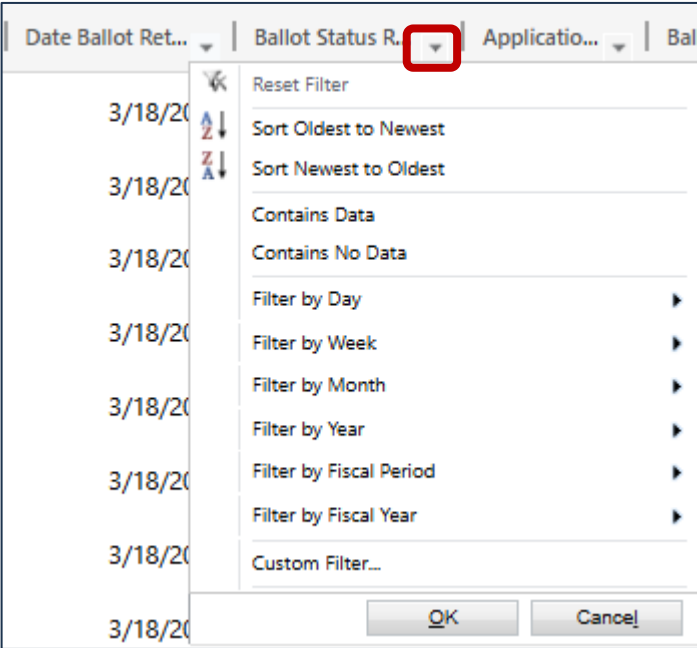
This image shows how multiple filters are applied. The second filter applies to data left from the first filter, the third applies to data left after the first two filters, and so on.



Column filters will include common default options and others specific to the type of data the column contains.

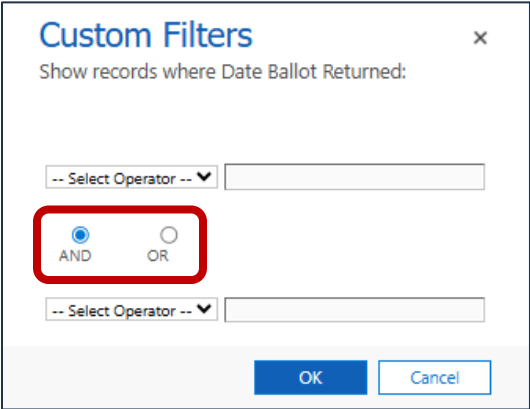
Default options common across all fields are Contains Data and Does not Contain filters, Custom Filter, and Reset Filter. The filter dropdown also includes default options to sort alphabetically.

Beyond the standard default filter options, each field includes standard default filters based on the data type the column contains. These data-specific default filters can include specific response types, such as absentee ballot return status, or day, week, month, etc. filters for any date-based fields.



*Custom Filters*

The Custom Filter option provides a separate pop-up window where users can choose up to two filter options for the same column at the same time. These options go beyond the standard defaults and allow freeform text.



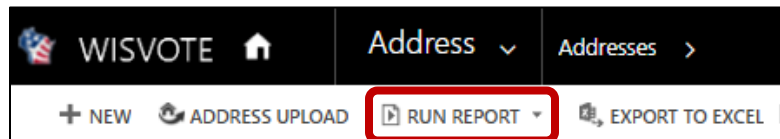
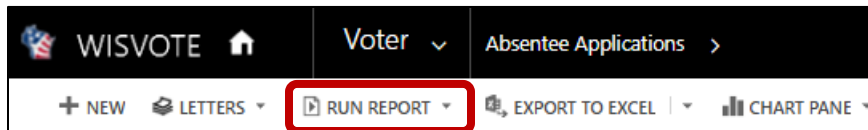
Two filters can be used at once using the And/OR options. The AND option will return records that meet the criteria entered for both custom fields. The OR option will return records that meet the criteria either of the custom fields.

If only one filter is used, the And/OR selection is ignored.

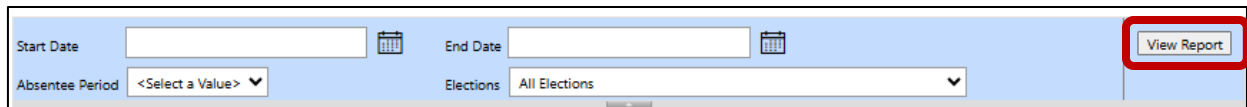
# WisVote Reports

WisVote reports allow users to view specific data using pre-programmed filters and settings. Reports are created by WEC development staff to meet statutory and election administration-related needs of WisVote users. Letters, label generation, and poll books are examples of the wide variety of outputs WisVote reports can have.

Most entities and records in WisVote will have associated reports that users can run and export without requiring WEC staff assistance.

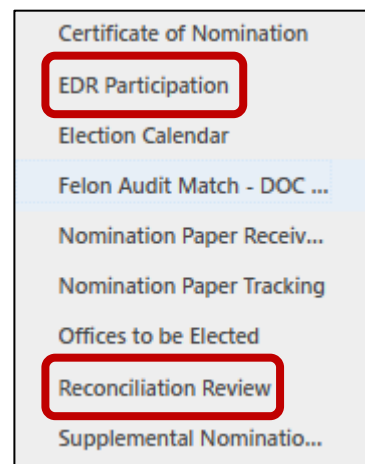


Most reports will not automatically run. A WisVote user will need to enter/choose information for the available fields and then click **View Report** for the report to generate.



## Reconciliation Reports

Each Election in WisVote has two reports specifically designed to help with reconciling absentee ballots and Election Day registration data: **EDR Participation** and **Reconciliation Review**. Both reports will generate when selected, without a user needing to enter additional information or fields.



The EDR Participation report will provide a list of all voter registrations entered using the EDR button for the election. The list includes an election participation field that will help users locate and identify any EDR w/o participation records that are included in the Election Reconciliation numbers.

EDR Participation- 2025 Spring Election							
Voter	Voter Reg Number	Ballot Style	Election Participation	Voting Method	District Combo	Poll Book	Reporting Unit
Dehrer, Karen Lee	702874386		YES	At Polls	49028-001-5810-1	Ward 1	Ward 1
Kretlow, Marjorie	702874529		YES	At Polls	49028-001-5810-1	Ward 1	Ward 1
Packer, Lloyd George	702874385		YES	At Polls	49028-001-5810-1	Ward 1	Ward 1
Severson, Angela M	0715667920		YES	At Polls	49028-001-0238-2	Ward 1	Ward 1
Soldner, Lorraine M	0709490280		YES	At Polls	49028-001-5810-1	Ward 1	Ward 1
Spaeth, Kevin J	702874391		YES	At Polls	49028-001-5810-1	Ward 1	Ward 1

The Reconciliation Review report includes two reports that will be combined into one output. The first section will list voters who have an absentee ballot record marked as returned, but no participation at all or At Polls participation.

Reconciliation Review for the Election 2025 Spring Election				
Voter Name	Reporting Unit	Ballot Style	Ballot Status	Voting Method
Norberg, William Bernhardt	Village of Cambridge - Ward 2	VILLAGE OF CAMBRIDGE: BS 01	Returned	

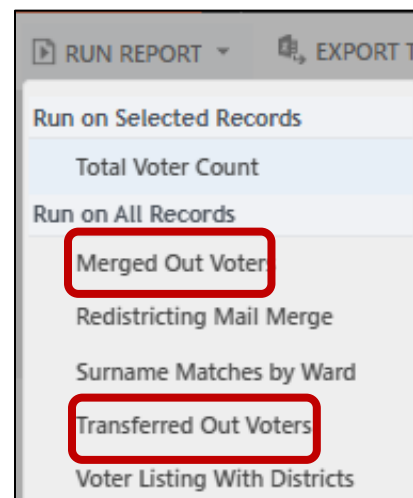
The second section will list voters who have an absentee participation recorded but no absentee ballot record marked as returned, or marked as something other than returned.

Reconciliation Review for the Election				
Voter Name	Reporting Unit	Ballot Style	Ballot Status	Voting Method
Agwatu, Stella A	Ward 35	CITY OF MILWAUKEE: BS 03		Absentee

The Reconciliation Review report can return false positives when voter records are merged before your reconciliation is complete. Because of this, it is important to complete your reconciliation as soon as possible after an election.

#### Merged and Transferred Out Reports

The Merged and Transferred Out reports can be found under the Voter tile. These two reports assist with records retention by allowing clerks to identify voters who have registered elsewhere in Wisconsin.



Voters identified by this report can have their physical registration documents pulled from local records, with the date of transfer or deactivation used to calculate the four-year minimum retention timeframe.

Both reports require the user to enter a date range before the report can be generated. The Merged Out report includes a calendar option for selecting the date while the Transferred Out report requires both dates to be entered manually. Both reports will also provide the voter’s new jurisdiction and date of the merge or transfer.

The Merged Out report will list the records in pairs; with the top record belonging to the user’s jurisdiction and the bottom record listing their new registration details.

Old Jurisdiction	Date Merged	Old Status - Reason	Old Full Name	Old Voter Reg Number	Old Date of Birth	Old
CITY OF RICE LAKE - BARRON COUNTY	08/04/2025	Inactive - Merged	Manor, Larissa M	0710938570	06/08/2004	M58
New Jurisdiction		New Status - Reason	New Full Name	New Voter Reg Number	New Date of Birth	New
TOWN OF SPOONER - WASHBURN COUNTY		Active - Registered	Manor, Larissa M	702889463	03/10/1949	M58

The Transferred Out report will list one voter per line, with the date the record was transferred and the jurisdiction where it was transferred.

From Jurisdiction	To Jurisdiction	Transfer Date	Last Name	First Name	Date of Birth
CITY OF RICE LAKE - BARRON COUNTY	CITY OF EAU CLAIRE - MULTIPLE COUNTIES	04/07/2025	PRENDVILLE	SHANE	04/26/1962
CITY OF RICE LAKE - BARRON COUNTY	TOWN OF BEAR LAKE - BARRON COUNTY	04/03/2025	Adkins	Bryce	08/08/1949
CITY OF RICE LAKE - BARRON COUNTY	VILLAGE OF NEW AUBURN - MULTIPLE COUNTIES	04/07/2025	Suedel	Cheyenne	04/26/1962

## Advanced Find

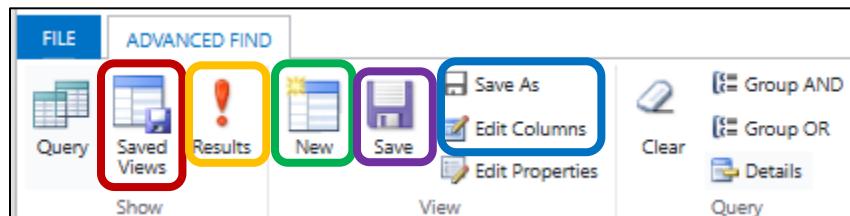
Advanced Find is a filtering tool built into Microsoft CRM that allows users to create customized views from data available in WisVote. Advanced find views are not limited in scope like reports or system views and will search all records in the WisVote database if allowed. As a filter, advanced find views are not able to compare different sets of data and are limited to searching within the chosen entity or where data from other WisVote entities overlap, such as address records associated with voter records.

Advanced Find is accessed by clicking the filter icon located to the left of the user's jurisdiction found on the right side of the upper ribbon in WisVote.

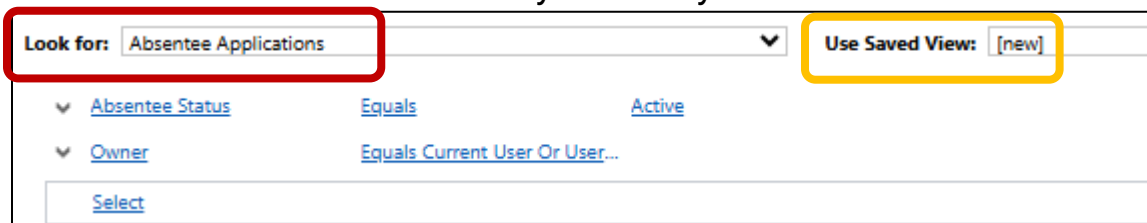


When the icon is clicked, an Advanced Find pop-up will appear. We recommend accessing Advanced Find from the WisVote home page (aka Easy Navigate Menu) to prevent filter options from being hidden or locked.

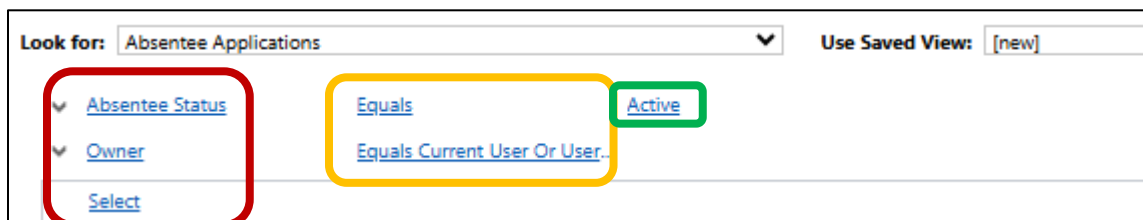
The top portion of the Advanced Find pop-up is where you will find options to generate the data, save changes to an existing advanced find, save a new advanced find, edit columns to be included, and clear selections to start over.



Below the action buttons, you will find the options to begin building your advanced find. Always start with the **Look for** option. This is how a user selects the entity they will be searching/filtering. The saved views that appear under **Use Saved View** will be determined by the entity selected in **Look for**.



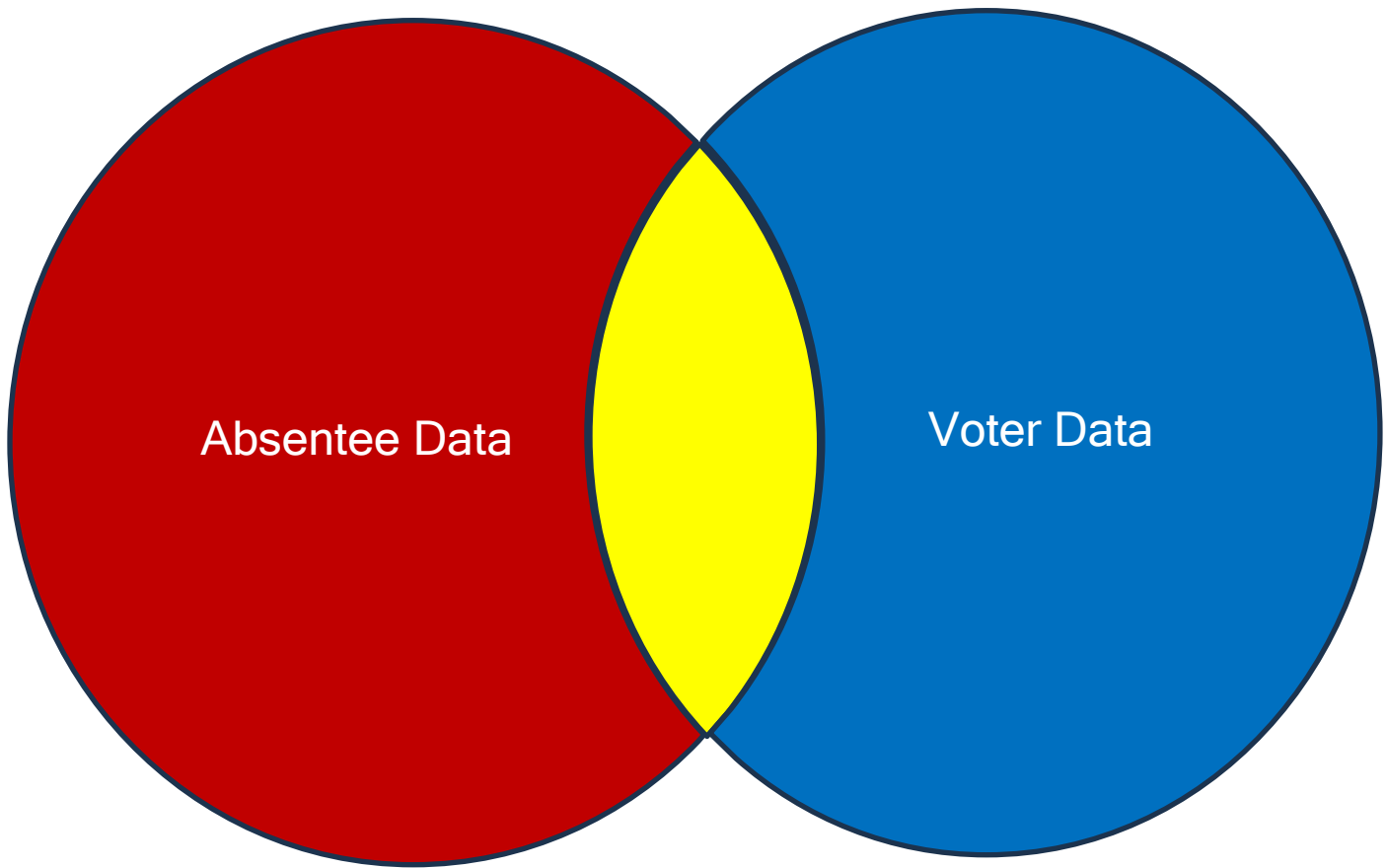
Once the entity is selected, selecting the filter criteria can begin. An advanced find has up to three selections per data point. Fields (red box), Rules (yellow box), and Values (green box).



Fields are data points available for the selected entity and are used to filter data. Rules are the limits that will be applied to the values field. Values are the specific response/status that should be searched for. If the selected rule does not have values subject to further filtering, such as Owner, then a value field will not appear.

Remember the limitations of Advanced Find when building your query. Any data points must be part of the entity selected in **Look for** or shared by a related entity.

Think of WisVote data as a Venn diagram. You can search for data within a given entity (Absentee or Voter data) and where the entities overlap (yellow area). Any data outside the entity or shared space cannot be included in the advanced find.



In the above example, if searching in absentee data, you can also include filters for voter data that are included in an absentee application - such as a voter's date of birth, their voter type, or their home/mailing address. You would not be able to filter for a voter's registration history, the provided POR, or the Driver License number.

#### *Warnings*

Advanced Find is a powerful tool but can also impact WisVote performance statewide if used irresponsibly or incorrectly.

Always access advanced find with a purpose in mind and only when needed - use existing WisVote reports and filtering and sorting options where they are available. Use the Sandbox environment for practicing your advanced find skills. **DO NOT** practice in the live WisVote environment!



