



# Year End Stats Reporting

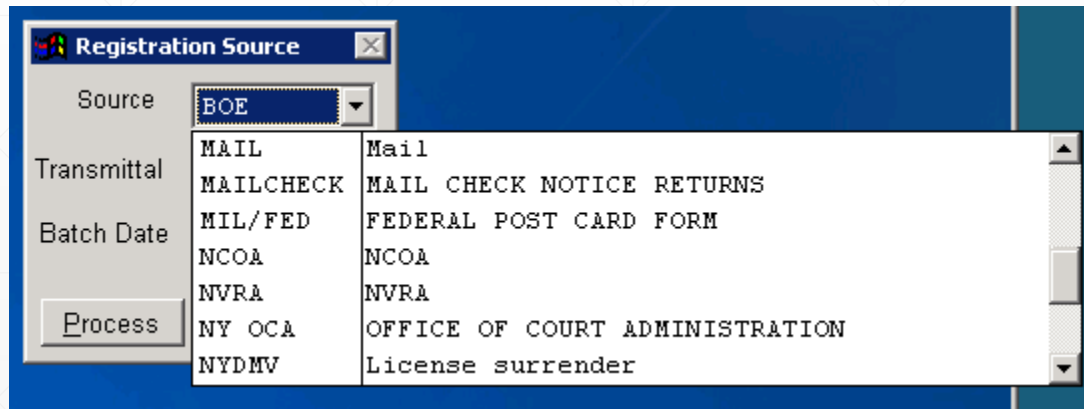
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2017 ECA Winter Conference, NTS Users Group

# Registration Sources and Actions

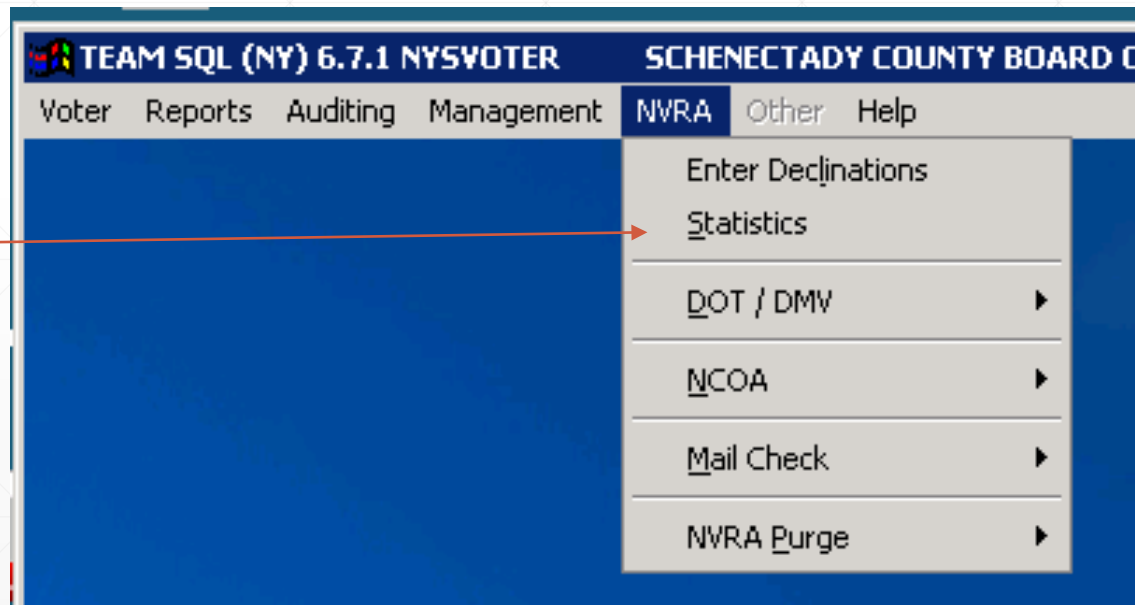
- TEAM tries to track and report on useful data regarding the Source of Voter Reg and Maintenance
- GIGO - Garbage In, Garbage Out:

How well this works depends on users being diligent in using the Source codes as you begin any Voter Maintenance:

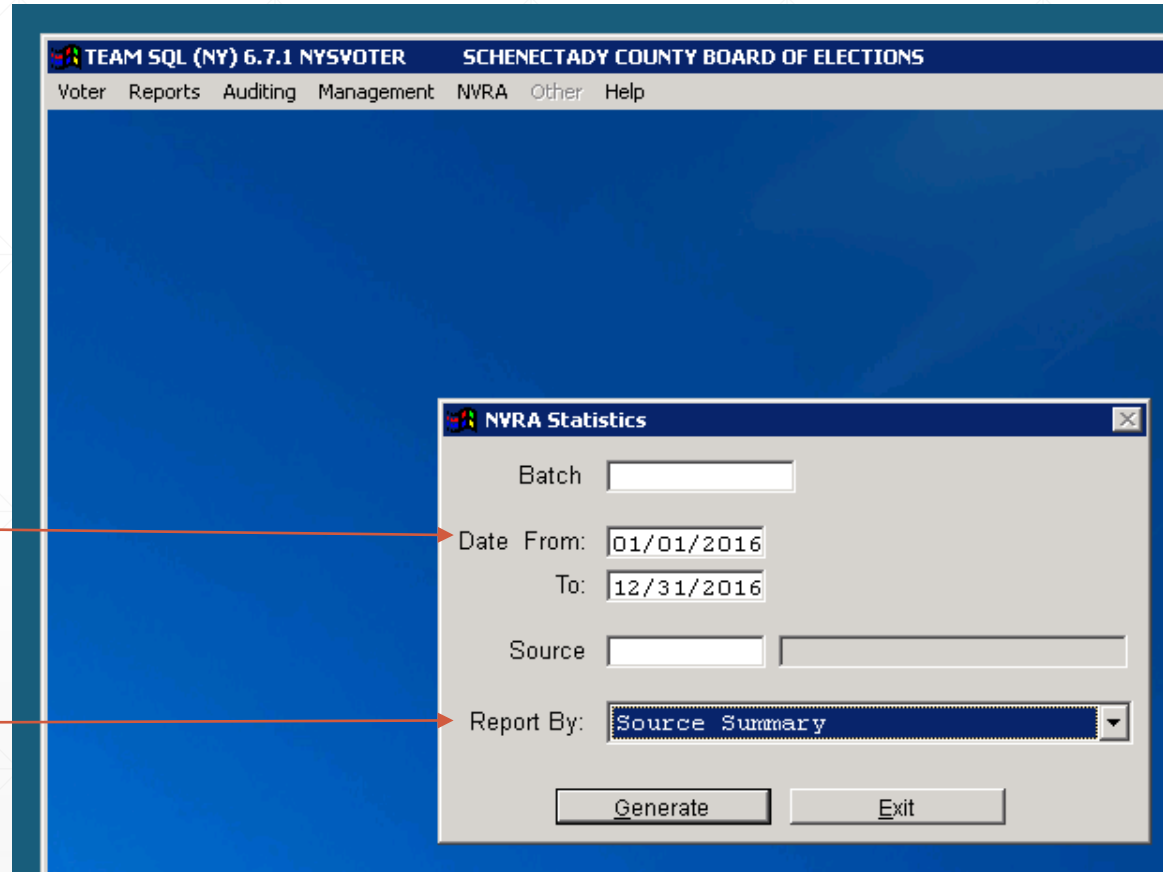


# NVRA Reporting

In TEAM Voter Reg Module, go to NVRA/ NVRA Stats:



# Enter Date Range, and select Report by “Source Summary”



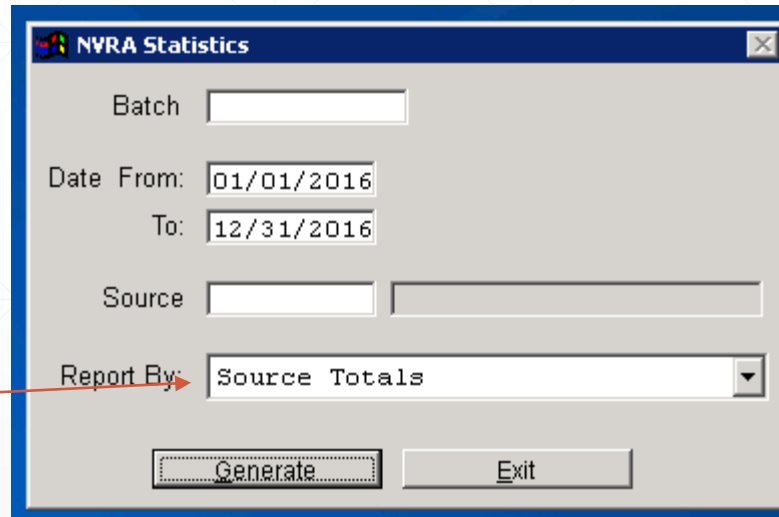
# Report produced by Reg Source:

Registration Source Board of Elections (BOE)		Registration Source E-MAIL NOTICE (EMAIL)	
New Reg	14	New Reg	0
Name Chg	2	Name Chg	0
Res Chg	9	Res Chg	0
Dist Info	36	Dist Info	0
Mailing Addr Chg	6	Mailing Addr Chg	0
Party Chg	18	Party Chg	0
Personal Info	8	Personal Info	0
Duplicate	6	Duplicate	1
Incomplete	5	Incomplete	0
Absentee	5,210	Absentee	0
Poll Worker	19	Poll Worker	0
Voter Status Chg	19	Voter Status Chg	0
Prev Jur	2	Prev Jur	0
DOT	0	DOT	0
Reprint ID.	2	Reprint ID.	0
Database Delete	0	Database Delete	0
Declined	0	Declined	0
<b>Total</b>	<b>5,356</b>	<b>Total</b>	<b>1</b>

# Last page has Summary:

Run Totals					
New Reg	14	Name Chg	2	Res Chg	8
Dist./ Info	36	Mailing Addr Chg	6	Party Chg	18
Personal Info	8	Duplicate	7	Incomplete	5
Absentee	5,210	Poll Worker	19	Voter Status Chg	19
Prev Jur	2	DOT	0	Reprint ID.	2
Database Delete	0	Declined	2	<b>Total</b>	<b><u>5,358</u></b>

# Or run by Source Totals:

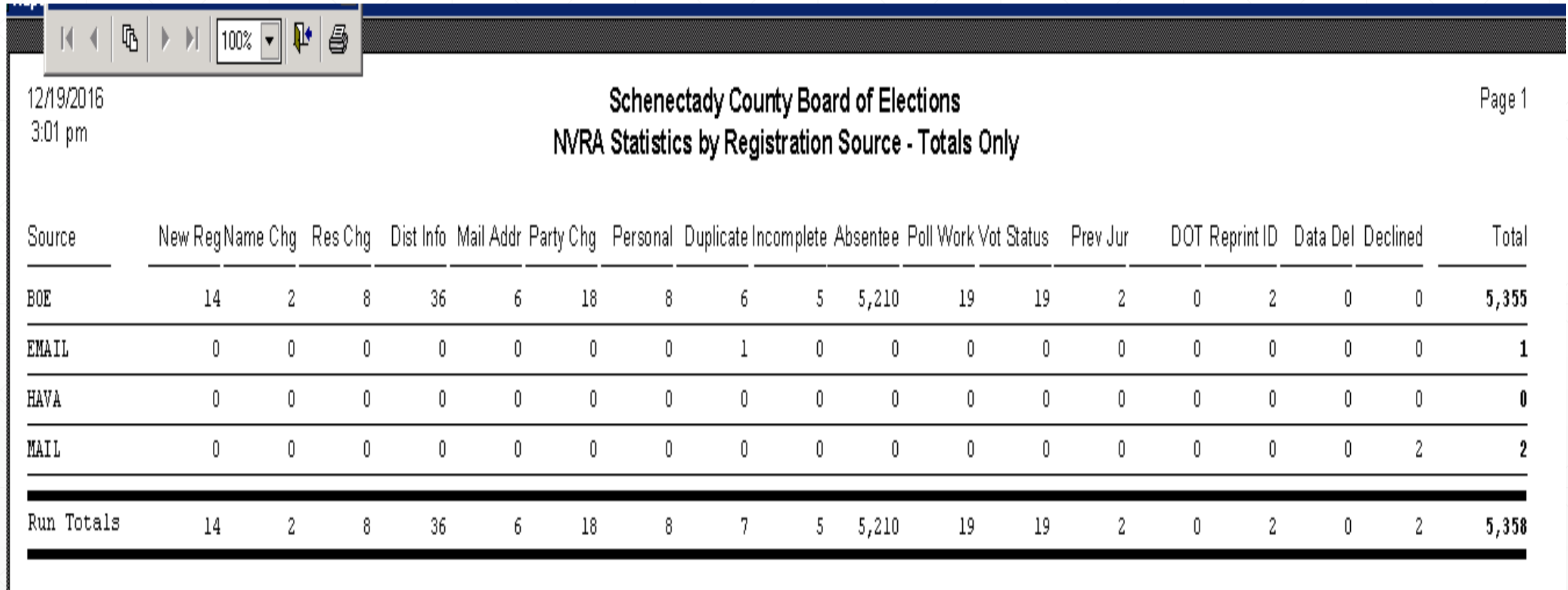


The screenshot shows a dialog box titled "NVRA Statistics" with the following fields and controls:

- Batch:
- Date From:
- To:
- Source:
- Report By:  (dropdown menu)
- Buttons:  and

A red arrow points to the "Report By" dropdown menu.

# And get different view:



12/19/2016  
3:01 pm

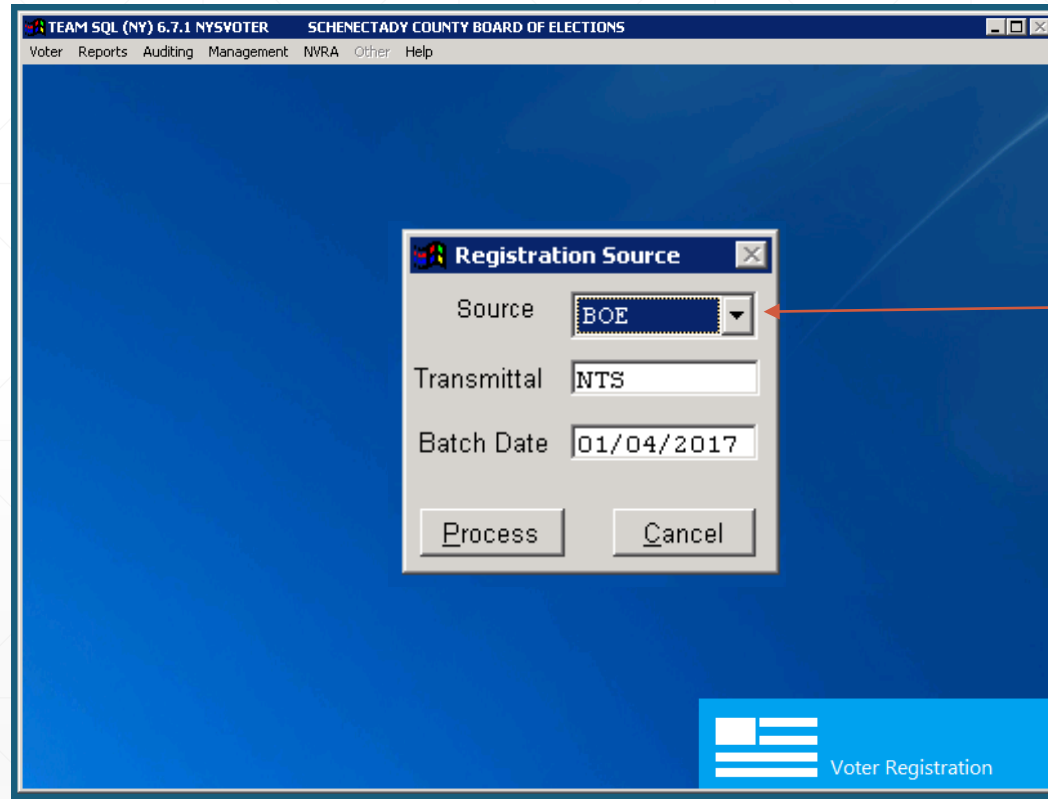
**Schenectady County Board of Elections**  
**NVRA Statistics by Registration Source - Totals Only**

Page 1

Source	New Reg	Name Chg	Res Chg	Dist Info	Mail Addr	Party Chg	Personal	Duplicate	Incomplete	Absentee	Poll Work	Vot Status	Prev Jur	DOT Reprint ID	Data Del	Declined	Total	
BOE	14	2	8	36	6	18	8	6	5	5,210	19	19	2	0	2	0	0	<b>5,355</b>
EMAIL	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	<b>1</b>
HAVA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	<b>0</b>
MAIL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	<b>2</b>
<b>Run Totals</b>	<b>14</b>	<b>2</b>	<b>8</b>	<b>36</b>	<b>6</b>	<b>18</b>	<b>8</b>	<b>7</b>	<b>5</b>	<b>5,210</b>	<b>19</b>	<b>19</b>	<b>2</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>2</b>	<b>5,358</b>



# Remember – the Report depends on Users selecting correct Source:



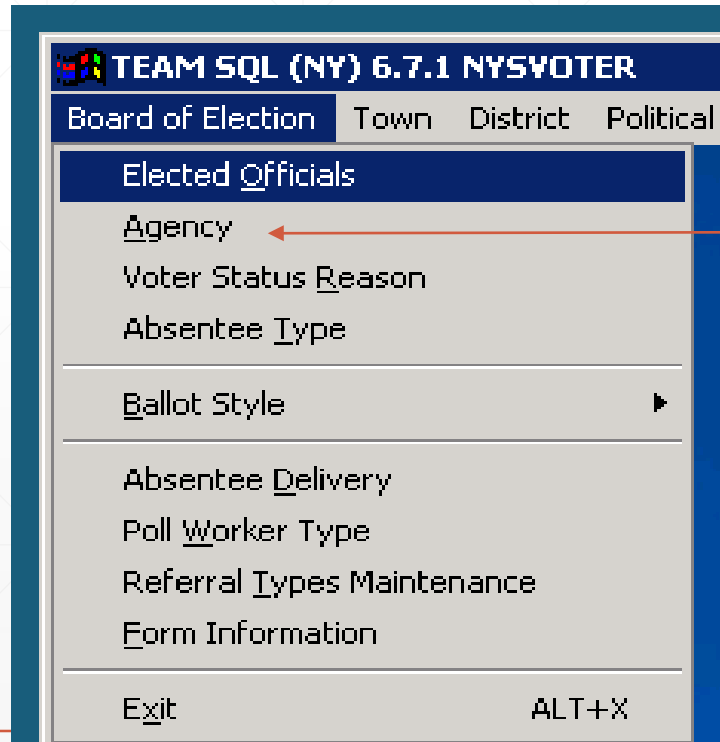
**Click down arrow for options. (BOE is usually default)**

The image shows a software dialog box titled "Registration Source". It has a "Source" dropdown menu currently set to "BOE". A list of other options is displayed below the dropdown, each with a corresponding description. The options are: MAIL (Mail), MAILCHECK (MAIL CHECK NOTICE RETURNS), MIL/FED (FEDERAL POST CARD FORM), NCOA (NCOA), NVRA (NVRA), NY OCA (OFFICE OF COURT ADMINISTRATION), and NYDMV (License surrender). There is a "Process" button at the bottom left of the dialog box.

Source	Description
MAIL	Mail
MAILCHECK	MAIL CHECK NOTICE RETURNS
MIL/FED	FEDERAL POST CARD FORM
NCOA	NCOA
NVRA	NVRA
NY OCA	OFFICE OF COURT ADMINISTRATION
NYDMV	License surrender

# Maintaining Source Options

Reg Source options are controlled by table at:  
Supporting Tables/ Board of Elections/ Agency



### Agency/Registration Source Maintenance

Agency Name	Code	State Code	
Address Correction Postcard	ADDRESS	CBOE	
AFFIDAVIT BALLOT	AFFBALLO	CBOE	
Blue Dot	BLUEDOT	AGCY	
Board of Elections	BOE	CBOE	
Central	CENTRAL	CBOE	
Confirmations Returned Non Mail Check	CONFIRM	CBOE	
DMV Import	DMVI	DMV	
COUNTY DATABASE COMPARISON	DUPCHK	CBOE	
E-MAIL NOTICE	EMAIL	CBOE	
NEED ID	HAVA	CBOE	
High School	HIGH SCH	SCHOOL	
Local Registration	LOCREG	LOCALREG	
Mail	MAIL	MAIL	
MAIL CHECK NOTICE RETURNS	MAILCHEC	CBOE	
FEDERAL POST CARD FORM	MIL/FED	MAIL	
NCOA	NCOA	CBOE	
NVRA	NVRA	MAIL	

# Every Code must also be mapped to a State Code

The screenshot shows a software window titled "Agency/Registration Source Maintenance". It contains several input fields and a dropdown menu. The "Code" field is empty. The "Name" field is also empty. There is a checkbox labeled "Source Default" which is unchecked. Below this is a section titled "State Mapping" containing a "State Code" dropdown menu. The dropdown menu is open, showing a list of options: AGCY, CBOE, DMV, LOCALREG, MAIL, and SCHOOL. A "Save" button is located below the "State Code" dropdown. The window has a standard Windows-style title bar with a close button.

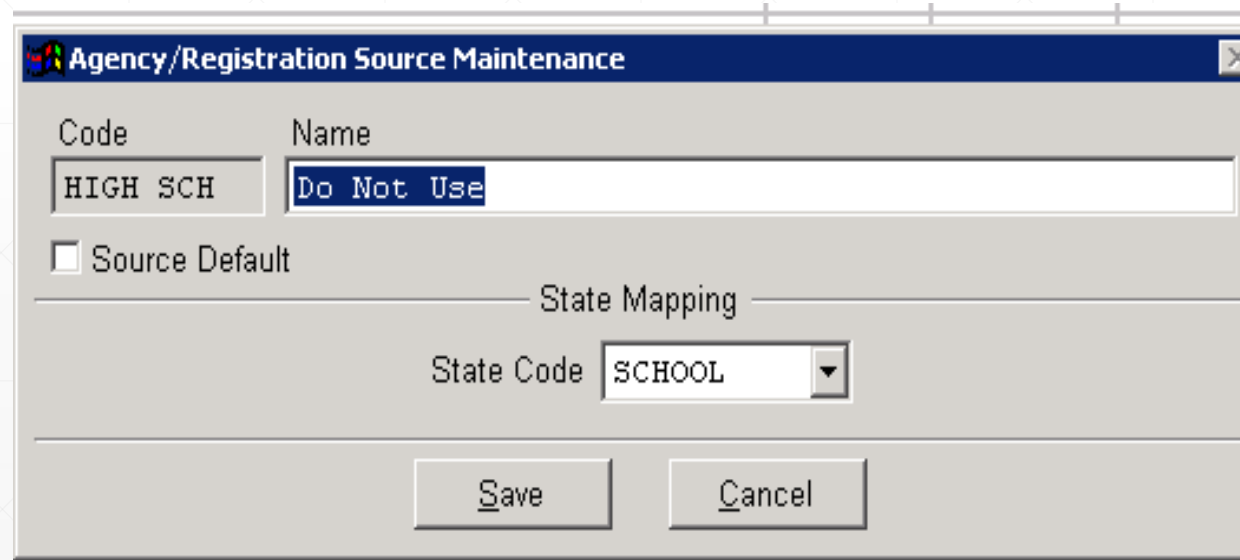
# Default code is controlled here:

The screenshot shows a dialog box titled "Agency/Registration Source Maintenance". It contains the following fields and controls:

- Code:** A text box containing "BOE".
- Name:** A text box containing "Board of Elections".
- Source Default:** A checked checkbox, indicated by a red arrow pointing to it from the left.
- State Mapping:** A section header above a dropdown menu.
- State Code:** A dropdown menu currently showing "CBOE".
- Buttons:** "Save" and "Cancel" buttons at the bottom.

# Source Code Maintenance

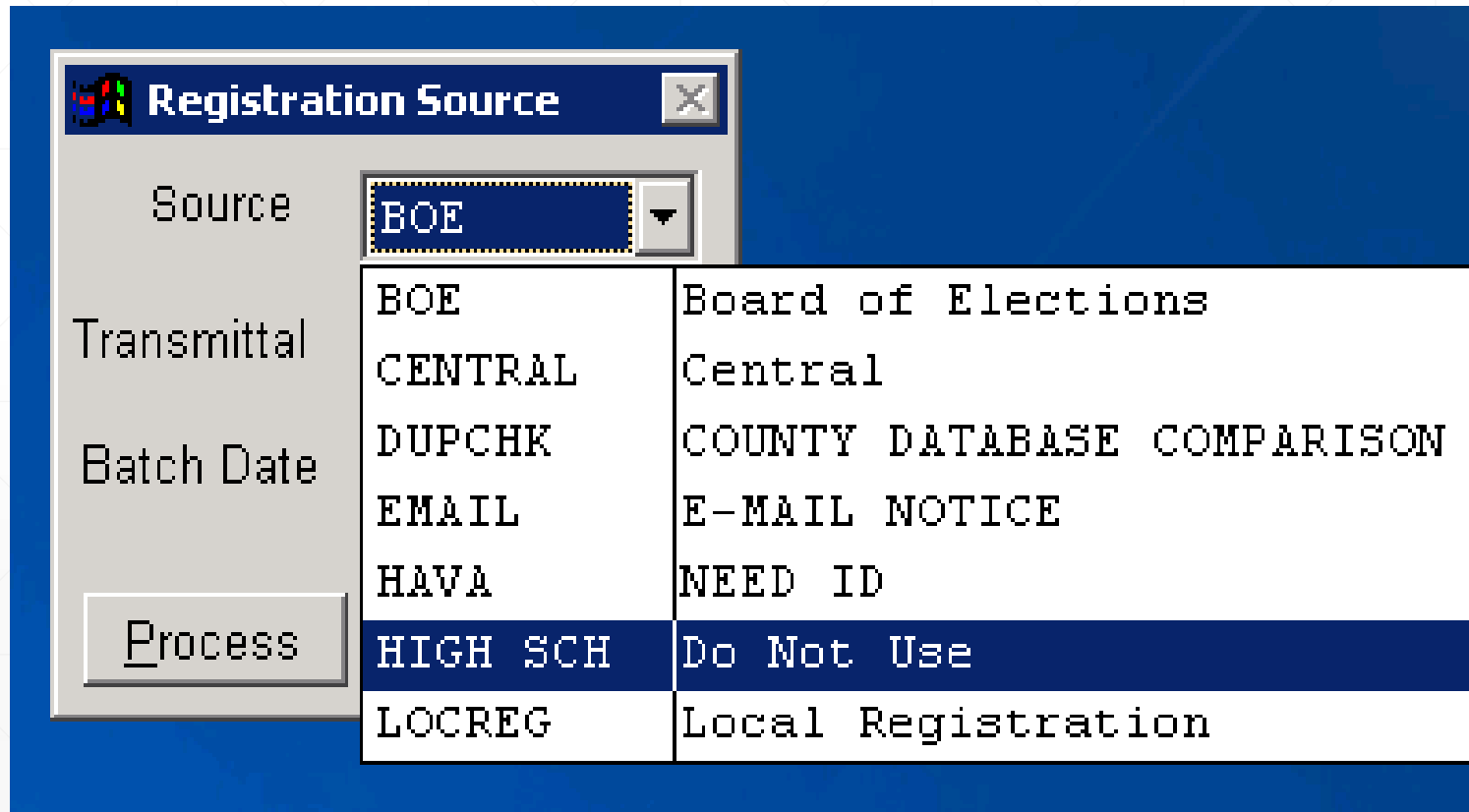
- You can't delete a code once it's been used
- But you can decide to not use it in the future
- Choose code and click "Modify," then in Name field put "Do Not Use":



The screenshot shows a dialog box titled "Agency/Registration Source Maintenance". It contains the following fields and controls:

- Code:** A text box containing "HIGH SCH".
- Name:** A text box containing "Do Not Use".
- Source Default:** An unchecked checkbox.
- State Mapping:** A section header.
- State Code:** A dropdown menu currently showing "SCHOOL".
- Buttons:** "Save" and "Cancel" buttons at the bottom.

You will still see code in drop down, but users will also see prompt “Do Not Use.”



The image shows a screenshot of a software dialog box titled "Registration Source". The dialog box has a blue title bar and a light gray background. It contains several fields: "Source", "Transmittal", and "Batch Date". The "Source" field is currently set to "BOE". A dropdown menu is open, showing a list of options. The "HIGH SCH" option is highlighted in blue. Below the fields is a "Process" button.

Source	Description
BOE	Board of Elections
CENTRAL	Central
DUPCHK	COUNTY DATABASE COMPARISON
EMAIL	E-MAIL NOTICE
HAVA	NEED ID
<b>HIGH SCH</b>	<b>Do Not Use</b>
LOCREG	Local Registration



# Other Reports:

## Annual Notice Totals (Ack, Confirm, Transfer, etc.)

- Go to Voter Reg/ Audit/ General Notices
- Put in date range, under Report, select Totals)

**Notice General Selection**

Voter From:  To:

Date From:  To:

Type of Notice

Notice Action

Report

Order

# Result:

01, 2:50 pm

ctady County Board of Elections  
Notice Tracking Totals By Type

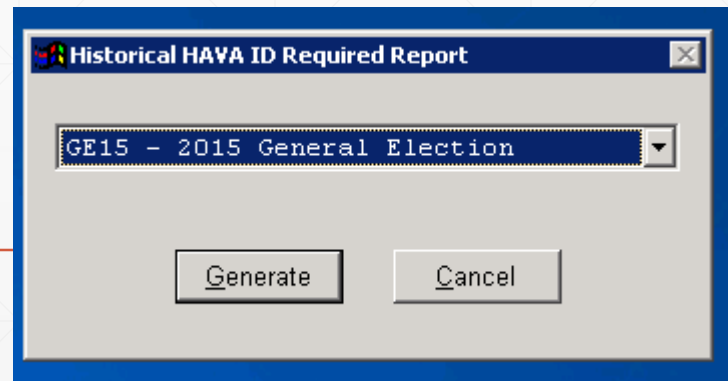
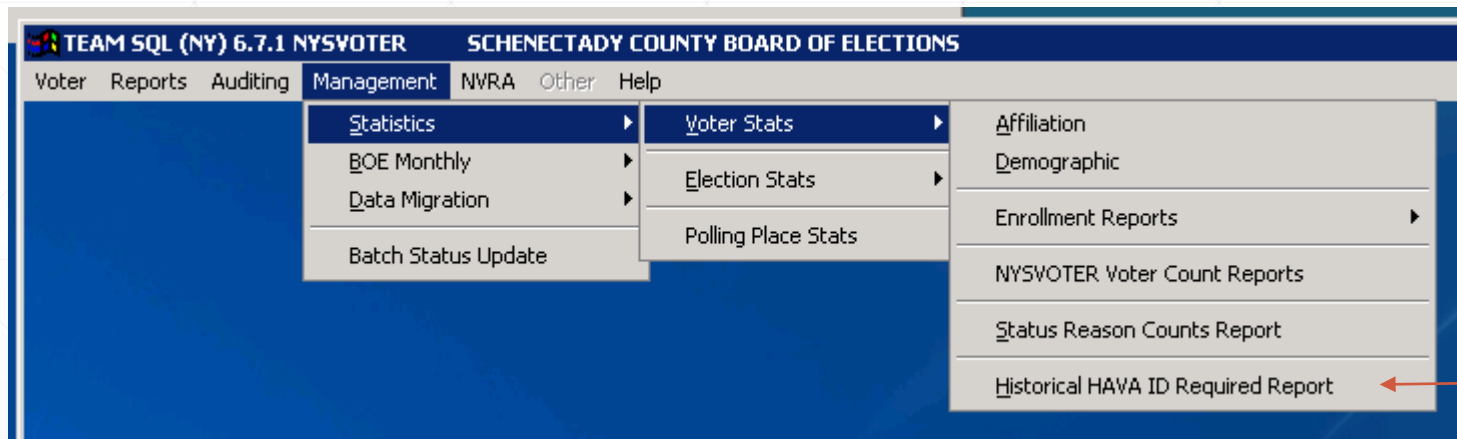
Date of Notice Events during the period 01/01/2016 thru 12/31/2016  
Ordered by Notice Name/Event/Date

Total Acknowledgment	8,510
Total Ballot Lbl	15
Total Cancellation	6
Total Confirmation	17
Total ENR	11
Total Prev Juris Ltr	1
Total Rejection	9
Total Transfer	51
<b>Total Notices Reported</b>	<b>8,620</b>

# HAVA Voter ID Report (how many voters showed ID)

After collecting Voter History, go to:

Voter Reg/ Management/ Statistics/ Voter Stats/ Historical HAVA ID Req. Report



# Results:

01/04/2017  
3:43 pm

**Schenectady County Board of Elections**  
**Historical HAVA ID Required Statistics Report**  
**For Election: 2015 General Election**

Page 1

	<u>Voters Req'd To Show Id</u>	<u>Voters Req'd To Show Id And Voted</u>	<u>All Voters Who Voted</u>
<b><i>Duanesburg</i></b>			
DU /000/001 - Duanesburg, District 1	13	0	18
DU /000/002 - Duanesburg, District 2	15	0	15
DU /000/003 - Duanesburg, District 3	12	0	0
DU /000/004 - Duanesburg, District 4	20	0	0
DU /000/005 - Duanesburg, District 5	16	0	0
<hr/>			
<i>Totals For Ward 000</i>	76	0	33
<hr/>			
<i>Totals For Town Duanesburg</i>	76	0	33
<hr/>			

**Note: For HAVA ID Report to work, Election Code must have been set up correctly:**

The screenshot shows the 'Election Code Maintenance' window. It contains the following fields and options:

- Code: PE16
- Date: 09/13/2016
- Type: Primary
- Name: 2016 Primary Election
- Desc: Primary election
- Apply HAVA ID Requirement:
- Clear HAVA ID:

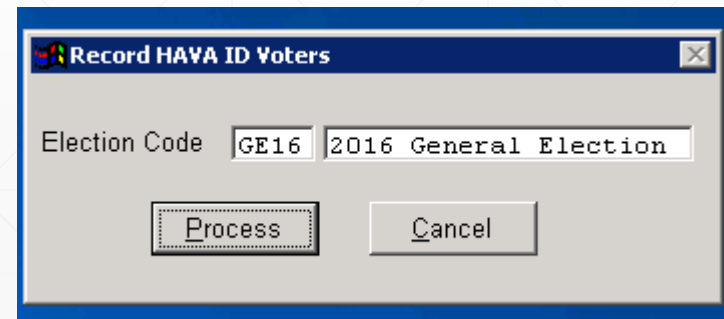
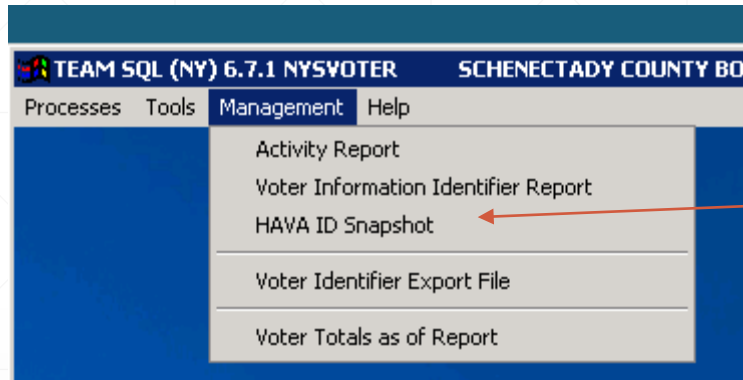
Two red arrows point to the checked checkboxes for 'Apply HAVA ID Requirement' and 'Clear HAVA ID'.

And you will get a prompt when creating your Poll Book File to do a Before snapshot

The dialog box has a blue title bar with the text 'Attention'. It contains a question mark icon and the text: 'Do you wish to record HAVA voters at this time for this election?'. At the bottom, there are two buttons: 'Yes' and 'No'.

The message box has a blue title bar with the text 'Microsoft Visual FoxPro'. It contains the text: 'HAVA voters have been recorded for this election'. At the bottom, there is one button: 'OK'.

# Or - Management and control/ management /HAVA ID Snapshot



## Final Thoughts:

- Run all the various NVRA and other reports and become familiar with what they keep track of (you can't hurt anything!)
  - Plan ahead – make note of what sort of stats you need each year and make sure data is being collected accordingly
  - Make sure everyone is aware of and uses Source Codes correctly
  - “Retire” any codes that are not useful and to ensure your year end reports are concise
  - Add a new code(s) only if needed
  - Run the reports monthly to make sure data is being collected as expected
  - PDF all year end reports for future reference
-

# Questions?



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