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March 23, 2026

County Clerk/Registrar of Voters (CC/ROV) Memorandum #26066

TO: All County Clerks/Registrars of Voters

FROM: /s/ Margarita Arroyo
Analyst II

RE: Primary Election: Vote-By-Mail Preparedness

The VoteCal staff and the CACEO Business Process Committee, representing counties, have created a county preparation checklist to outline recommended steps a county should take through their Election Management System (EMS) prior to mailing all registered voters a vote-by-mail (VBM) ballot. Please complete the attached checklist, share with appropriate staff, and review the checklist on a regular basis to ensure all voters receive the appropriate ballot.

As part of the checklist and review, we are recommending that EMS ballot issuance settings and procedures be reviewed by each county. Please review the actions your EMS will take when the following changes are made to a voter record:

- Name Change
- Residence or Precinct Change
- Mailing Address Change
- Change of VBM Status
- Receive Ballot Preference Change (switch to mail/e-mail/fax)
- Language Change
- Voter changes from non-active to active status
- Voter changes from active to non-active status

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The Secretary of State recommends that manual validation or a tested and approved county process be in place for any VBM ballot reissuance for the election.

If you have any questions or need clarification regarding this CC/ROV or other VoteCal matters, please contact the VoteCal Help Desk at (888) 868-3225 or via email at VoteCalHelp@sos.ca.gov.

If you need assistance completing actions within your EMS please contact:

- DFM support at support@dfmassociates.com
- Runbeck support at emshelpdesk@runbeck.net
- Provista support at ViBEVoteCalSupport@provistacorp.com

Attachment



SOS VoteCal

and

CACEO Business Process Committee (BPC)

June 2, 2026, Statewide Direct Primary Election

Vote-by-Mail Preparedness Checklist



Checklist to Prepare your Election Management System for 100% Vote-by-Mail Ballot Mailings:

Verify/Update your County Procedures for Vote-By-Mail Suspend/Reissue:

- Test procedures for each scenario in CTE, if possible

Scenario	Expected Response <i>For example: Auto Issue / Manual Issue / Bulk Issue/ Do not issue</i>	Actual Response
Name Change		
Residence or Precinct Change		
Mailing Address Change		
VBM Status Change		
UOCAVA Ballot Preference Change (switch to mail/e-mail/fax)		
Language Change		
Voter changes from non-active to active status		
Voter changes from active to non-active status		
Party Change (Primary Only)		

- Review with EMS Account Manager if necessary

Verify procedures for applying HAVA ID ([SEC 20107 of Title 2 of the California Code of Regulations](#))

Verify Data Entry/Cleanup is Complete in your County:

- Paper Voter Registration Forms
- New Electronic Registrations
 - California Online Voter Registration (COVR)
 - Department of Motor Vehicles (DMV)
- Electronic Registration Cleanup
 - Records with bad/missing addresses resolved
 - Records pended for precinct/other issues
- Returned Notices Processed
 - Voter Notification Card (VNC)/2225(b)/(c)/8d2; other - as applicable

Review and Process Duplicate Analysis Wizard/Tools from Local EMS:

- Contact EMS account manager for best practices
- Identify and merge voter record pairs you find that you are confident are for the same voter

Review and Process EMS Messages from VoteCal:

- Review unresolved EMS message (UREM) statistics for your county
- Refer to VoteCal Guidance Document: [EMS Messages](#)
 - Deficient Errors
 - Potential Duplicates
 - Merge Voter Determine Survivor

- Potential DMV COA Match
- Potential Deceased Match
- NCOA Address Change
- Push Messages
- Send PreCancellation Notices (Deceased, Felon, Conservatorship) and cancel the impacted voters

- Work additional potential deceased matches** (see quarterly file “Potential Deceased Matches_3-20-2026” sent 3-23-2026)

- Review addresses in your County where large numbers of active voters are registered.** Note: If you would like a list of addresses in your county where over 10 active voters are registered, you may contact your EMS or the VoteCal Helpdesk.

- Run VoteCal Sync Check and Resolve Differences Identified:**
 - Refer to VoteCal Guidance Document: [Sync Check](#)

- Optional: Review and Process Coding Accuracy Support System (CASS) Data:**
 - Use the CASS certification from the post office
 - Check with your print vendor for this service
 - Update address errors based on information provided

- Activate Underage Voters:**
 - Run Happy Birthday Job to activate
 - Follow EMS Procedures

- Check Special Case Situations:**
 - Confidential Voters
 - Voters with known problems from past elections
 - Work locally received Felon or Deceased records

- Verify your EMS is configured to:**
 - Send VBM info to VoteCal automatically
 - Send data to your sorter
 - Has the correct election

- Review [VoteCal Ballot Processing Guidance Document](#)**
 - Review Section 3 regarding EMS settings for issuing ballots