



Guidance: Voter Information Guide (VIG) Process

Issuance Date: September 6, 2016

Revision Date: May 4, 2018

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May 2018 Voter Information Guide (VIG) Notes:

Run a synchronization check and resolve the voter registration differences to the acceptable tolerance levels at least 30 days prior to generating any election extracts or lists. This is to ensure the most complete and accurate extracts and lists are generated.



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With VoteCal, the Secretary of State (SOS) will continue generating the initial Voter Information Guide (VIG) mailing list extract at E-60 for all counties. An additional VIG mailing extract will also be run by SOS at E-29 for all counties. SOS mails VIGs to households with registered voters residing in California and counties mail VIGs to out-of-state voters, as well as voters with address corrections from the error file provided by SOS.

The initial VIG mailing list extract includes all active registered voters as of the configurable date (E-60) that have not opted out of receiving a VIG by mail. The additional VIG mailing includes all active registered voters who registered to vote between E-59 and E-29 and have not opted out of receiving a VIG through postal mail.

After E-50, counties can request additional VIG mailing list extracts from VoteCal using their EMS. Refer to your EMS documentation or contact your EMS vendor for additional information on generating additional VIG mailing list extracts.

For the initial VIG mailing, the SOS sends a CCROV with instructions to the counties and a readiness survey. The county signals readiness by returning the survey (via email) to the SOS. Once received, the SOS requests the VIG mailing list extract from VoteCal. The SOS Information Technology Division (ITD) team uses the extract from VoteCal to create four separate mailing lists:

- The out-of-state mailing file (also known as the “Foreign file”). This file is created for counties to mail VIGs to these registrants.
- An error file of records that failed address validation, but the registrants are registered to vote. This file is created because the county is responsible for mailing VIGs to these registrants, and so the county can correct the address validation errors.
- The cleansed file contains addresses SOS corrected and mailed. This file is sent to counties so that counties may correct these records in the county’s EMS to ensure SOS has no problems with these records in future mailings.
- The in-state mailing file is used by the SOS for in-state mailings. This file is not sent to the counties.



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Figure 1: VIG Process depicts an overview of the process of generating a VIG mailing list extract and mailing the VIG.

Figure 1: VIG Process

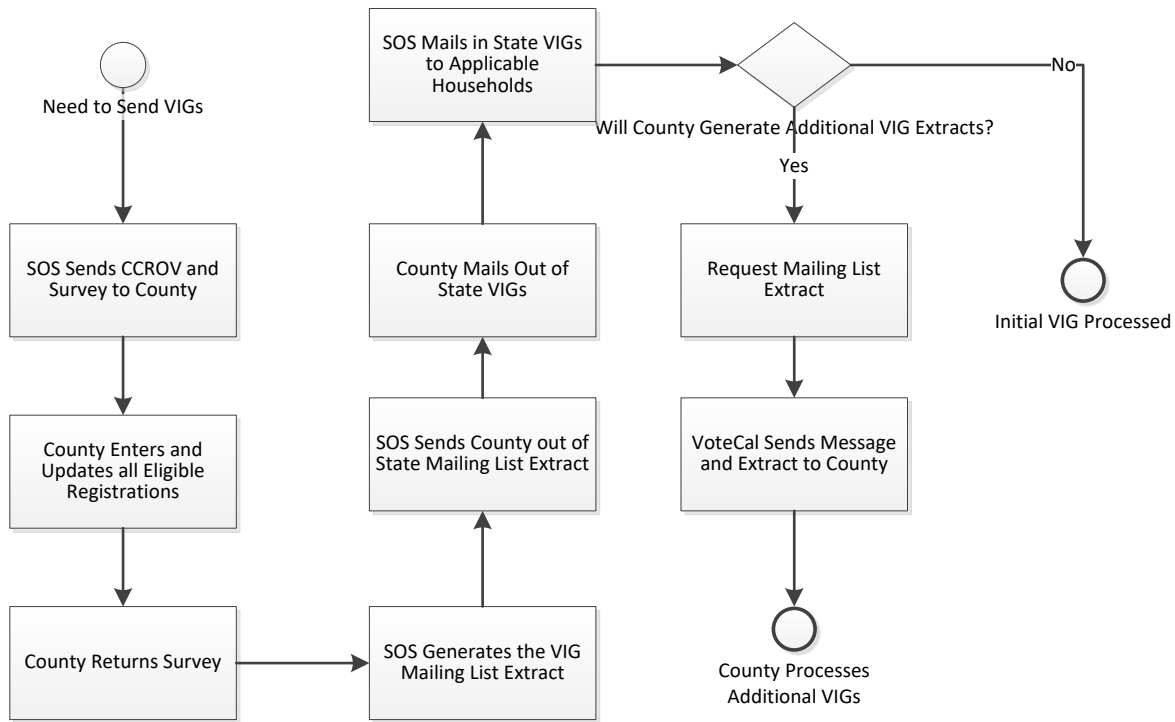


Table 1: VIG Process provides an overview of the process of preparing for and generating the mailing list extracts for the initial and additional VIG activities.

Table 1: VIG Process

ACTIVITY	PROCESS
1. SOS Sends CCROV	The SOS sends a CCROV to each county, with a request for the counties to complete a survey to signal their readiness for VIG mailings. This survey confirms that the counties have set up their elections and voters, and are ready to create the VIG mailing list extract.
2. County Prepares for VIG Mailing List Extract	The county confirms a sync check was completed for the ROR at least 30 days prior to generating any election extracts, verifies all eligible new and updated voter registrations are entered in the local EMS, and verifies that all precincts with active voters are assigned to the election.
3. County Returns Survey at E-60	The county completes the readiness survey and returns it to the SOS via email.



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ACTIVITY	PROCESS
4. SOS Generates VIG Mailing List Extract and Mails VIGs	SOS receives the county readiness survey and requests the VIG mailing list extract from VoteCal. ITD formats the extract into four files and sends the error, cleansed, and out-of-state files to the appropriate counties. SOS mails VIGs to registered voter households residing in California. Note: Confidential voters do not appear in this extract. Counties are responsible for mailing VIG to confidential voters.
5. County Mails Out-of-State VIGs	The county receives out-of-state voter VIG mailing list extract from the SOS at approximately E-50 and the county mails VIGs to voters residing outside of California. Note: Confidential voters do not appear in this extract. Counties are responsible for mailing VIG to confidential voters.
6. SOS Generates Additional VIG Mailing List Extract and Mails VIGs	On E-29, SOS requests the additional VIG mailing list extract from VoteCal for voters who registered between E-59 and E-29. This extract will include four files 1) error, 2) cleansed, 3) out-of-state, and 4) in-state mailing file which will be sent to the appropriate counties. SOS mails VIGs to registered voter households residing in California. Note: Confidential voters do not appear in this extract. Counties are responsible for mailing VIG to confidential voters.
7. County Requests Additional VIG Mailing List Extract	If the county decides to send additional VIG mailings between E-50 and E-29, the county requests the VIG mailing list extract through their EMS. (Review corresponding EMS Guide for detailed instructions) Note: Confidential voters are excluded by default, select "Include Confidential Voters" if they should appear on the VIG Extract. Potential error messages you may receive: <ul style="list-style-type: none">• XML format is not allowed for VIG extract – received if XML format is requested; this is an invalid type of extract• Parameter {0} is in the past – received if the scheduled date entered is not current or date in the future• ScheduleDateTime is equal to or after the Election Date – received if the scheduled date is the election date or later• Match not found – received if a matching election is not found• County {0} not authorized to access County {1} data – received if user is attempting to request an extract for another county• VIG is {0} days prior to the election {1} - {2} – received if attempting to request an extract too close to the election; there will be a pre-determined number of days set by SOS• Missing value for parameter {0} – received if attempting to select an incorrect election ID



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ACTIVITY	PROCESS
7. County Requests Additional VIG Mailing List Extract (continued)	<ul style="list-style-type: none">• Missing value for parameter {0} – received if attempting to select an initial VIG mailing list extract because only SOS can the initial VIG mailing extract• County cannot request an initial VIG – received if county attempts to request an initial VIG,• County cannot request another county VIG – received if the county attempts to request an extract for another county• The {0} field value of {1}.{2} is not valid for this type of extract – received if the value for file format is not valid <p>The additional VIG mailing list extract contains active registered voters not included in any previous VIG mailing extracts for the election.</p> <p>An additional VIG cannot be generated until after the initial VIG mailing extract has been completed for an election.</p>
8. County Mails VIG	VoteCal sends a message to the EMS, “Extract Files Generated” and sends a file with the mailing list. Using the county EMS, access the extract and process and mail VIGs. (Review corresponding EMS Guide for detailed instructions.)

VoteCal Contact Information

For questions or to report issues, contact the SOS VoteCal Help Desk at 888-868-3225 or by email at VoteCalHelp@sos.ca.gov.