Regarding Statutory Requirements

* This presentation is not intended to repeat statutory requirements, since all such requirements are available in Title 13.

* The purpose of this training is to suggest and discuss specific absentee best practices.
Absentee Flow Chart 1
(sending, receiving, rejecting*)

*See next flow chart for processing accepted ballots

1. Provide ballots and instructions to voters
2. Receive marked ballot
3. Scan barcode into MT Votes
4. Verify signature in MT Votes
5. Accept/reject ballot in MT Votes
6. Place rejected ballots in secure, sealed container

Office of the Secretary of State
Providing Ballots to Electors

* Electors who come into your office to apply for and request absentee ballots, after ballots are printed, should be given ballots, even if they come in before ballots are mailed.

* Absentee ballots must be sent to absent military and overseas electors as soon as ballots are printed and no later than 46 days before the election.
  - This is verified and strictly enforced by US DOJ.
Providing Ballots to Electors

* Other electors should be mailed ballots on the 25\textsuperscript{th} day before election day (never earlier than the 25\textsuperscript{th} day).
  
  - If absentee ballots are already sent when electors change/update registration, the county that sent the original ballot has to void the ballot before the registration can be processed and a new ballot issued.
Providing Ballots to Electors

* USPS

- Recommendations:
  - Meet with Post Office personnel and/or Mail Service Company at least one month prior to mailing.
  - Make sure envelopes meet USPS requirements.
Providing Ballots to Electors

* USPS

- Recommendations:
  - Inform USPS of the number of ballots being mailed.
  - Remind them how critical it is to receive back undeliverable ballots as soon as possible.
  - Discuss specific cost-savings measures.
Ballot Instructions

* In order to maintain **uniformity**, counties are advised to use the **prescribed absentee instructions**:
  - Minor variations may be necessary, especially based on county-specific considerations.
  - For major variations, please consult SOS.
* Be sure to **read the absentee instructions** to ensure that they are applicable, clear and concise.
* Ensure that instructions specify the **accurate amount of postage** needed to return the marked ballot.
Some counties label every mail tray with an inventory slip:

- For example: label the first as Tray 1 of 8, include the # of ballots enclosed, sort by groups of 25.
- Mail & In-person batches are kept separate.
  - When entering batches into MT Votes you need to select mail, in-person, etc.; keeping the mailed-in and in-person batches separate ensures that you do not have to change the source in MT Votes for each ballot.
Receiving Ballots from Electors

* Prepare envelopes so signatures are visible (keeping them in groups of 25).
* **Scan bar code** – each batch should equal 25.
* Also, put undeliverable ballots in batches of 25. Filing the undeliverable ballots by **batch #** eliminates the need to alphabetize undeliverables for retrievables.
Daily Absentee Ballot Reconciliation

* In order to conduct daily absentee ballot reconciliation, **compare accepted envelopes with the BP34 report** from MT Votes and fill out **Part 1 of the Ballot Reconciliation Report**.

* Make a **copy of the Ballot Reconciliation Report** and seal the original Ballot Reconciliation Report with the secrecy envelopes.
Daily Absentee Ballot Reconciliation

Ballot Reconciliation Report (for Poll Book)

Form is included in the back of each poll book and is used to reconcile ballots on Election Day.

COUNTY _______________  PRECINCT _______________

PART 1

1. Last ballot number issued
   _______________________

2. Subtract Void and Spoiled Ballots
   _______________________

3. Subtotal
   _______________________

4. Subtract number of ballots reserved for Absentee voting – see Ballot Certification Report
   (use the "Total number of ballots retained for Absentee voting" number from that form)
   _______________________

5. Total number of paper ballots issued
   _______________________

PART 2
Signature Verification

* Next step is to verify signatures.
* In MT Votes, select **Verify on batch management** or use the **F12 key** on the home screen for the voter.
* Also in **MT Votes**, set up **trained individuals** who are responsible to verify signatures.
* Set up procedures for the ballots they reject.
  ▪ Designate **yourself or another election official** to be responsible for reviewing all **rejected** signatures.
Signature Verification

* Review all signatures using the following criteria:
  - **capital** letters match;
  - letters **tail off** alike;
  - **letter spacing** is the same;
  - space between **signature and the line** is the same;
  - **beginning** and **ending** of signature;
  - the “t” crossing, “i” and “j” dotting, and letter strokes that drop **below the line**;
  - **pen pressure** is the same.
Signature Verification Examples
Signature Verification Examples

* Example Above: Signature change may have taken place because of age or other factors.

* If the change is extreme, recommend that the signer provide an updated voter registration form with the signer’s most current signature.
Signature Verification Examples

Original Signature

Comparison Signature
Signature Verification Examples

* Example Above: The comparison signature may not be a match. **Pen pressure** is different and **several letters** are different.

* You may wish to check registrations of **other voters in the household** with the second signature, to see if someone in the household signed instead.
Signature Verification Examples

Original Signature

Comparison Signature
Example Above: This is a real-life example. The comparison signature is fake.
- In the real signature, the "V" in Valentino is **rounded** and never pointed.
- The "R" in Rudolph is much different as well.
- The "pen pressure" appears to be different in the fake as well.
Before rejecting a signature, view other signatures on file in MT Votes.

A best practice may be for election officials to check all of the available signatures in MT Votes, especially if the voter has a very old voter registration application on file.
Ballot Rejection Determinations

* Use previous precinct registers to verify signatures (as a backup if you aren’t quite sure on a signature).
  - Be sure to use the VR application or Absentee Application as the final authority.

* Once all signature verification attempts have been exhausted and you still believe the signature is a mismatch, the election administrator shall give notice to the elector by the most expedient method available and send “Verification of Signature” form to elector to resolve rejected ballot.
The election administrator shall inform the elector that, prior to 8 p.m. on election day, the elector may:

- By mail, facsimile, electronic means, or in person, resolve the issue that resulted in the ballot being handled as a provisional ballot, confirm the validity of the ballot, or verify the elector's or agent's signature or provide a signature, after proof of identification, by affirming that the signature is in fact the elector's, by completing a new registration form containing the elector's current signature, or by providing a new agent designation form; or

- If necessary, request and receive a replacement ballot pursuant to 13-13-204.
### Absentee or Mail Ballot Signature Verification or Submission of Missing Signature

**Office of the Secretary of State**

**Absentee or Mail Ballot Signature Verification or Submission of Missing Signature**

13-13-245, MCA

**MUST BE COMPLETED AND RETURNED TO THE COUNTY ELECTION OFFICE**

**Note to Absentee or Mail Ballot Envelope:** The absentee ballot or mail ballot you submitted:

- [ ] did not have the required signature on the signature envelope, or
- [ ] included a signature that did not appear to match the signature on your voter registration record and on your absentee application.

Please complete the form below and enclose a copy of identification, if return by 5:00 p.m. on **[date]**, the day before election day, if mail, fax, email, or in person; or if received in person at the county election office by 3 p.m. the day after election day.

#### Return Address

[ ]  (printed name of elector) hereby declare that the signature submitted below is my signature and that it is the same as my signature on my absentee ballot signature envelope, if applicable, and that this identification enclosed is a copy of my true and accurate identification.

**Signature of Elector**

[ ] I declare that I am entitled to vote by absentee ballot.

**Signature of Election Official**

[Date]

A mail ballot or absentee ballot voter whose signature is in question may resolve the issue by completing and submitting this form and a copy of this form accompanied by a copy of a state or federal identification showing your voter registration, if mail, fax, email, or in person. If the signature is not otherwise resolved, process ballot on a provisional ballot, and follow the procedure in 1-2-3-245(d), which is to resolve the provisional ballot.

**Copy of Absentee or Mail Ballot (Note: process ballot as a regular ballot)**

**Copy of Absentee or Mail Ballot as a Provisional Ballot**

[Signature of Election Official]  
[Date]
Securing Rejected Ballots

* Keep rejected ballots in **alphabetical order** and place them in a **secure area** unless and until they are resolved by the voter.
* Rejected absentee ballots that are not resolved by election night should be treated as **provisional**, but do **not** enter them into the **provisional module**.
* After the election, rejected ballots that have not been resolved are **stored with the provisional ballots**.
Absentee Flow Chart 2 (after signature verification)

For accepted ballots, remove secrecy envelope from signature envelope

Count/ tabulate ballots

Open secrecy envelopes

Deliver secrecy envelopes to polls if counting at polls

Deposit secrecy envelope in secure sealed container

Seal and secure counted ballots

Report results
Some counties open signature envelopes to remove secrecy envelopes (but not the ballots) as soon as the signature is verified.

Other counties open them on a daily or weekly schedule, and others wait until election day.

For uniformity purposes, we recommend opening signature envelopes as soon as the signature is verified, or daily at the latest.
The secrecy envelopes should be stored in a dry secure location with restricted access until early preparation or election day.
Early Preparation

* Election officials can open secrecy envelopes to remove ballots *no earlier than 1 business day before election day.*

* In the presence of any person who requests to be present, an election official opens the secrecy envelope, removes and unfolds the ballot and, *without looking at the votes*, places the ballot in a secured ballot box.

- Ballots should be *weighted down overnight* to help flatten them for better machine tabulation.
Observers of early preparation should normally be not less than 10 feet or more than 20 feet from this early preparation, unless these distances are not feasible.

Election officials preparing ballots under this section must sign an oath, securely seal ballot boxes, and complete the Early Absentee Ballot Preparation Reconciliation form.
Finalizing Absentee Data

* Please be sure to scan in your absentee **Undeliverable** envelopes as soon as they come in, so that:
  - The SOS can get accurate absentee information, especially for UOCAVA voters; and
  - Voters are able to check **My Voter Page** and find out that their ballot is Undeliverable.

* Also scan in ballot envelopes that are received **too late to count**, unless you have closed your election.
Review

* Each of the **flow charts** in this presentation is copied on the next two slides for easy reference.
Absentee Flow Chart 1 (sending, receiving, rejecting)

- **Send ballots and instructions to voters**
- **Receive marked ballot**
- **Verify signature in MT Votes**
- **Scan barcode into MT Votes**
- **Accept/reject ballot in MT Votes**
- **Place rejected ballots in secure, sealed container**
Absentee Flow Chart 2
(after signature verification)

For accepted ballots, remove secrecy envelope from signature envelope

Count/tabulate ballots

Open secrecy envelopes

Deliver secrecy envelopes to polls if counting at polls

Deposit secrecy envelope in secure sealed container

Seal and secure counted ballots

Report results
1) Can voters request an absentee ballot without stating a reason?

- Yes. Since **October 1, 1999**, voters can request absentee ballots without specifying a reason and without having to be absent on election day.
2) Once absentee ballots are printed and available for issuance, do we have to provide them to people who come into our office to request them, even if they come in before the first day ballots are to be mailed?

- Yes. (If they instead request to have the ballots mailed to them, mail them out the same day you mail your other absentee ballots.)
3) Can an interest group member mail a voter registration or absentee application in the same envelope as campaign literature if that envelope is marked to resemble a mailing from an election office?

- No. This is specifically prohibited in law, 13-35-603.
Absentegee FAQs

* 4) Can an interest group mail, or advise an individual to mail, a VR application or absentee application to any address **other than the county EA’s office**?

- **No.** This is also specifically prohibited in law, 13-35-604. However, the law does not prohibit an interest group member from taking such applications **in person** and submitting them to the election office.
5) Can a member of an interest group pick up people’s ballots at the election office in order to deliver them to voters?

- Yes, an interest group member can pick up ballots as long as the voter signs a form stating that the person is authorized to do so, and the person has not already picked up ballots for four other electors.
6) Can a person from an interest group pick up ballots from voters and submit them?

- Yes. Just as there is no prohibition on a family member dropping off ballots at the election office, there is no prohibition on interest groups doing so.
- However, you may wish to warn voters about giving their ballots to people who they do not know.
7) Can an absentee voter come into the election office and get a new ballot after the voter’s original absentee ballot has been submitted and received by the election office but not processed, for example if the voter changes his or her mind?

- No. Once a ballot is received by your office, it is determined under Montana law to be voted. Since electors cannot vote a ballot more than once, they cannot receive a replacement ballot in this situation.
8) Are we allowed to do early preparation (removing the ballots from the secrecy envelopes) the weekend or week before the election?

- No. Early preparation can only be done one (1) business day before election day.
9) Can we process as absentee ballots the ballots that were issued to voters who signed the precinct register?

- No. This would make it difficult to provide accurate absentee totals, since MT Votes would track them as absentee voters rather than polling place voters.
- This could also make it appear that voters who were not eligible for absentee ballots (due to the application deadline) were provided with them, thereby raising concerns about the election.
10) Can we issue absentee ballots as provisional ballots and not track them anywhere in MT Votes as absentee?

- No. Again, this would make it difficult to provide accurate absentee totals, since MT Votes would track them only as provisional voters rather than as absentee voters.
- This could also make it appear that voters who were eligible for absentee ballots were not provided with them, again raising concerns about the election.
What is the harm in generating regular absentees in MT Votes at the same time as generating UOCAVA absentees?

- This can cause a multitude of problems with sent dates that appear to indicate that the voters were sent ballots much earlier than is accurate.
- It can cause major issues when voters move within the county or to another county after the absentees are generated in MT Votes.
- Before each federal election, the SOS provides email guidance regarding when absentees can be generated.
Absentee Questions