Petition Processing in MT Votes

2020 Election Administrator Certification Training
Updated March 2021

Montana Secretary of State
sosmt.gov  •  soselections@mt.gov
OVERVIEW

• Receiving Petitions Basics
• Creating Petitions
• Circulators
• Petition Preprocessing
• Processing Signatures
• Petition Reports
• Petition Policy
• Troubleshooting
Receiving Petitions

• **Start processing** as soon as you receive signed petitions.

• Every sheet or set of up to 25 petition sheets submitted together must have a **signature gatherer affidavit** with.

• If affidavits are submitted at the bottom of a pile of petition sheets, have the sponsor or signature gatherer sort them out.
  – You do not have to sort out which petitions belong with which signature gatherer – this is the responsibility of the sponsor and signature gatherer.

• When you receive petitions provide a receipt. Date & time stamp them. Process them in the order that you receive.

• Be sure to process as **one submittal** each petition sheet or set of sheets, up to 25 sheets submitted with **one affidavit**.
  – When you come to a new affidavit, even from the same signature gatherer, process it as a new submittal.
  – **One affidavit = one submittal** in MT Votes.
Acceptable Affidavits of Signature Gatherer

Sample of a completed Unsworn Declaration affidavit.
Creating Petitions

To Create petitions in MT VOTES, click on Petitions in the Petitions menu.
Creating Petitions

Petitions screen. (Active petitions will show by default.)

SOS will create any statewide petitions.

County election officials create local petitions by clicking “New”.

Creating Petitions
Creating Petitions

Example of filled fields:

**Scope** - choose correct political subdivision.

- Fill in all the petition fields information.

- Leave **Max Lines** field blank.

- Click **Save** to store the new Petition.
Circulators are Signature Gatherers

Petitions Screen:
- To add circulators, click on the petition to select it.
- Click Detail.
Circulators

Ensure that you are in the right petition.

Is the circulator in the Circulator(s) area?

If not, then add them by clicking the New button in the Circulator(s) box.
Circulators

New Circulator:
Enter the last and/or first name of the Circulator and click Link to Voter.

It automatically fills or brings up a list of individuals with that name. (If the circulator is not registered, see the next slide.)

Click Save then Close if found here.
Circulators

If the circulator is **not a registered voter**, or not registered in your county (circulators are **not** required to be registered), then a search dialogue box will display.

You can click on the **State** button and **Search** statewide, then **Select** if found.

If not found, click **Close** to enter the circulator information manually.
If you determine that the circulator is not registered to vote, input the circulator’s information in the Name section and by clicking on the **Detail** button in the **Contact Information** section for address and contact information.
Circulators

Contact Detail
Enter the circulator’s address and contact info.
Click **Update** to store and then **Close**.
Click **Save** on the Circulators screen to save the record.

Note: **Close** here or **Close** on the found Circulator page takes you back to the Circulators screen.
Preprocessing submitted sheets.

The petition process is like an assembly line. There is work to do before you go to the next step.

Preprocessing Sheets is the first step.

Click Preprocess Sheets.
Petition Preprocessing

Click **Auto Assign** to give these sheets a Submittal number.

(A Submittal consists of petition sheet(s) submitted together by a single Circulator with a **single affidavit** attached.)

Select a **Circulator**.

In **Receive Bulk Sheets** area, enter accordingly. In this example we have 2 to enter in **Receive Sheets** for a submittal with 10 for **Last Good Line**.

**SEE NEXT 2 SLIDES** to make sure you know the correct **Last Good Line** quantity before you click **Save**.
Petition Preprocessing

Petition sheet formatted with 10 signature lines.

You will need to look through all pages of the Submittal to determine the sheet with the most good lines. (“last good line” means the number associated with the last signature line that has been written in, even if certain signature lines are later rejected).

Example, if there are 2 pages, one in which the last good line is 8, and the second in which the last good line is 10, then the Last Good Line entered would be 10, as in this sample page.
Petition Preprocessing

If there are lines 1-10 on the front of the sheet and no lines on the reverse, process it as one sheet in MT Votes, with Last Good Line quantity of 10.

Similarly, if there are lines 1-10 on the front of the sheet and 11-20 on the reverse side of the sheet, this should be processed as one sheet in MT Votes with Last Good Line quantity of 20.

Click Save once you have entered the Last Good Line quantity in the Receive Bulk Sheets area.

Sample Petition Sheet

![Sample Petition Sheet]
Petition Preprocessing

Sheet Information

In Page # field, enter “1” then tab to the next field. Enter the Last Good Line quantity for that page.

In the Line-Code-Description area, click on the Code column and enter each applicable number in the Code column to match the lines on page 1 of your petition. (See the Code reference key to the right.)
Petition Preprocessing

In this example, lines 1-2 have been given a status of **Good** (signature).
Line 3 was **Crossed out**, lines 4-6 **No Signature**, lines 7-10 were **Blank**.

Move to the next page by clicking **Save & Next**.

On the last page, click only on **Save**, because clicking **Save & Next** adds pages to the submittal.
Petition Preprocessing

Repeat the process for Page #2 of the submittal and any additional pages.

WARNING: If you add more pages than needed, you will need to delete your submittal and start over or you’ll need to process all signatures on the extra page(s) as blank lines.

Next, you can print a label to put on the affidavit.
To print labels for your submittals, click the **Label** button at the bottom of the Preprocess Sheets page.

(If you choose not to print labels, be sure to manually number the petition affidavits with the applicable submittal number.)

Printing labels will allow you to use your handheld barcode scanner to enter the submittal number instead of keying it into the field.

**NOTICE:** If you want to print labels for all submittals, do not select a submittal in the “Submittal” dropdown and click the Label button. If you want to print one submittal, select the submittal in the “Submittal” dropdown and click the Label button.
Petition Preprocessing

Once done, click **Complete**, **Clear**, and **Close**.

*Click them in this order.*
Processing Signatures

You will be returned to the Petitions screen. You will now see the submittal in the **Signature Statistics** section at the bottom of the Petition page.

As you can see, in this example there are **12 out of 12** signatures **Remaining** to process.

Now, highlight the submittal you want to process and click the **Process Signatures** button.
Processing Signatures

Ensure that you are on the correct **Submittal**, and **Signature**, and click the **Next Unprocessed** button to start processing the signatures of this submittal.
Processing Signatures

Type in the Last and/or First Name of the signer and select Search. A list of potential matching voters will be displayed below.
NOTE:

It is **not recommended** to click on “Secondary Statewide Search” or “Search Statewide” since searching for people who are registered outside your county can be confusing.

If a voter *is* found in another county, then click “Not Registered”.

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*Signature Processing Screen*
Processing Signatures

Click on the appropriate voter record from the result list and click **Select** so it is the only record showing on the list. You cannot proceed until there is only one entry in the list.

If you want to verify that the searched voter is the voter who signed the petition, you can click on **Review Registration** or **Full Image**. These buttons will give you additional information on voter.
Processing Signatures

You have two options for each signature: **Accepted** or **Rejected**.

We’ll accept the signature of our Test Voter.

Choose the status of **Accepted**.

Click the **Save & Next** button to take you to the next line.
# Sample Petition Signature Sheet

Training Note: Counted or Not?

<table>
<thead>
<tr>
<th></th>
<th>Counted or Not?</th>
<th>Signature</th>
<th>Date Signed</th>
<th>Residence Address or P.O. Address or Home Phone</th>
<th>Printed Last Name, First and Middle Initials</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Not counted: All information is illegible</td>
<td>Vladimir</td>
<td>1-7</td>
<td>1 Crimea Way, Kiev, Russia</td>
<td>Putin, V</td>
</tr>
<tr>
<td>2</td>
<td>Not counted: Not registered in Montana</td>
<td>G. R. Tall</td>
<td>1-7</td>
<td>100 South Western, Helena, MT 59601</td>
<td>Tall, G.R.</td>
</tr>
<tr>
<td>3</td>
<td>Counted: Even though the signature on file is <em>Gerry Tall</em>, count if the signature on file, when taken as a whole, matches the one on file</td>
<td>Skip Tracy</td>
<td>1-7</td>
<td>100 Mountain Ave.</td>
<td>Tracy, S.M.</td>
</tr>
<tr>
<td>4</td>
<td>Not counted: Elector provided no residence address, PO Box, or phone #</td>
<td>G. R. Tall</td>
<td>1-7</td>
<td>100 South West, Helena, MT</td>
<td>Tall, G.R.</td>
</tr>
<tr>
<td>5</td>
<td>Not counted: Attempted duplicate of Signature 3</td>
<td>Sherry Bobbins</td>
<td>1-7</td>
<td>100 Yell Lane, Billings, MT</td>
<td>White, M. R.</td>
</tr>
<tr>
<td>6</td>
<td>Counted: Even though no town or city listed, as long as you can identify the voter</td>
<td>Moe White</td>
<td>1-7</td>
<td>100 1st, Helena, MT 59101</td>
<td>Anders, E.</td>
</tr>
</tbody>
</table>

County: Lewis and Clark
Processing Signatures

You are now ready to process your next signature line.

As you can see you are still on Sheet # 1 but are now on Line # 2.

We will pretend that this individual is not a registered voter.
Processing Signatures

You have two Rejection options:

1) If the voter is **not registered**, the most efficient option is to enter the name in the Save area and click **Not Registered** at the bottom of the screen. This will pre-fill the Status and the reason as Not Registered.

2) Or, you can enter the **Status**, and choose the specific **Reason** for rejection from the drop-down.

Then click **Save and Next**.
Processing Signatures

On the next line, try to add the same voter that you accepted from Line 1. Since you accepted the signature, you should receive a pop-up screen warning that they have *already signed* the petition.

Reject this signature as a Duplicate.

Click **Save & Next.**
Processing Signatures

Rejection Reasons:

- **Not Registered** means not registered in your county (even if the signer is registered in another county):
  - Type the voter’s name in the **Name** field below the Status field. This will display the name on the summary so you know whose signature was rejected; otherwise, if you receive an inquiry about whether a signature was rejected, you won’t be able to find the signer’s name.
- **Duplicate** means there is already an accepted signature for the signer.
- **Out of District** no longer exist, use **Not Registered in County/District**.
Processing Signatures

Continue to add voters for the associated lines.

When you reach the end of the petition you should see a message at the top of your screen that says “No unprocessed signatures with a page number greater than the number you entered on the Preprocessed Sheets screen.”

When you receive this message, click Close.
Processing Signatures

You will now see a **Summary** of your submittal.

If you notice an error on this screen you can click on the line and correct that record.

When all lines have been processed correctly, click the **Completed** button and then the **Close** button which will bring you back to the main Petitions screen.

The Petitions screen will now include a summary of the submittal.
Processing Signatures

Review of Options on Petition Signature Query Screen

1) **Process All Results**: Selects all signature lines for the submittal you selected. You normally would select this option if this is the first time anyone has processed signatures for this petition.

2) **Process Single Result**: After highlighting a specific line on a specific page, click this button to process that signature line only.

3) **Next Unprocessed**: Takes you to the next signature line that hasn't been processed yet. If one or more signatures have already been processed during a previous session, this is the only button that is active.
Processing Signatures

Review of Options on Petition Signature Query Screen

4) **Process By Page**: Use this option when you want to work with the signatures on a specific page. This is greyed out by default; to click on it you must first enter the page number in the input area to the right of the button, then press Tab.

5) **Completed**: Use this to indicate that the petition processing for a submittal is finished.

6) **Additional Line**: Allows you to add a line to a petition submittal.

7) **View Voter Record** is new. It allows you to access the voter’s record in case you need to view more information in the record.
Before a petition can be closed, you will need to ensure all circulators are entered, all sheets have been preprocessed for every submittal, and all signatures have been processed.
For local (City/County/Special District) petitions, when the entirety of the petition has been completed, the election administrator will need to change its status on the Edit Petition screen.

In this example, the petition is Not Qualified. (For statewide petitions, the Secretary of State’s office will change the status.)
Petition signers may fill out a voter registration form before signing a petition. However, until the voter registration application is processed, the individual is not a registered elector.

Accept the signature on a petition if the person is registered by the time you check the signature, assuming that there is no other reason to reject the petition.

It is not the burden of the SOS or election administrators to prevent non-registered electors from signing a petition. Similarly, it is not your burden to enter voter registration applications before you check petition signatures, although ideally you would be up to date with any voter registrations.
Petition Reports

At any time there are several reports that you can run from various locations within the Petitions Module. See Appendix B for these reports.
Searches can also be run from the Petition Signature Query screen, including a search for all signatures accepted, signatures rejected by reason, and you can search by page # and line # as well.
Petition Reports

The petition reports are also available through the Reports and Labels module.

The report that is most often used is **PM-009 Petition Certification – Statistics by House District**. This is the report you will complete and send to the Secretary of State’s office when processing any statewide petitions.
Petition Reports

Once in the Reports module

1st – Click Petitions

2nd – Select PM-009

3rd – Select Petition Type

4th – Select Petition Name

5th – Choose the Petition Submittal(s) you wish to certify

6th – Click Run Report
Petition Reports

For statewide ballot issue petitions, legislative, state district, or statewide candidate petitions, you will print, fill out, place your county seal on the **PM-009 Petition Certification**. Attach it to the original signed petitions and original affidavit. Send it to the SOS by certified mail, within 4 weeks of your receiving.

**NOTE**: For statewide candidate petitions and statewide party qualification petitions, send them so they are received by the SOS within 1 week of when you receive them, and no later than the final deadline for candidate filing.

Before you send the original signed petitions, affidavits and certifications, you **must make copies** to keep in your office.
The question often arises about whether to provide **one PM-009 for multiple submittals**, or to provide a **separate PM-009 report for each submittal**.

- Either is acceptable. If you have a **large number of signature pages**, say 25 pages, use one PM-009 for each submittal and affidavit.
- However, if you have multiple submittals with few signatures, these can be certified under one **PM-009**.

So, **One Affidavit still = One Submittal**, but with no more than 25 sheets. And, **multiple submittals can be in one PM-009 report**.
PM-009 Petition Certification Reports

Remember to date, sign, and affix the county seal to the PM-009 report. Make and keep a **copy** of the certifications, signed petitions and affidavits.

<table>
<thead>
<tr>
<th>HouseDistrict No</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>HD-043</td>
<td>1</td>
</tr>
<tr>
<td>HD-044</td>
<td>2</td>
</tr>
<tr>
<td>HD-045</td>
<td>1</td>
</tr>
<tr>
<td>HD-051</td>
<td>1</td>
</tr>
<tr>
<td>HD-052</td>
<td>2</td>
</tr>
</tbody>
</table>

**Petition Summary**

<table>
<thead>
<tr>
<th>HouseDistrict No</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>HD-043</td>
<td>1</td>
</tr>
<tr>
<td>HD-044</td>
<td>2</td>
</tr>
<tr>
<td>HD-045</td>
<td>1</td>
</tr>
<tr>
<td>HD-051</td>
<td>1</td>
</tr>
<tr>
<td>HD-052</td>
<td>2</td>
</tr>
</tbody>
</table>

Grand Total: 7

Signature: Skip Tracy

Date signed: 6-24-14

[County seal]

Montana VOTES
Petition Policy

1. A calendar, including the deadlines for statewide petitions to be submitted to county election offices, and for election administrators to file certified ballot issue petitions with the Secretary of State’s office, can be found on the SOS website at [http://sosmt.gov/Elections/Ballot_Issues](http://sosmt.gov/Elections/Ballot_Issues).

2. State law requires that for statewide ballot issues, circulators cannot be paid per signature. This only applies to statewide ballot issues, not local petitions or any candidate petitions; circulators do not need to be registered voters; and you are not responsible for policing these requirements.

3. Notarized Affidavit of Signature Gatherer or the new affidavit, Unsworn Declaration of Signature Gatherer must be completed for each submittal. A submittal can be up to 25 petition sheets. For example, if a signature gatherer provides 35 petition sheets, then they will have to have 2 affidavits attached. (1 affidavit for 25 pages and the second for the 10 remaining pages).
4. If you are unsure of an answer to a statewide petition policy question, review the Petitions Processing Tips document in MT Votes SharePoint where you found this guide. It can also be found on the Election Official Resources page. Or, contact the Secretary of State’s elections division at soselections@mt.gov or (406) 444-9608.

The address for mailing statewide petitions is:
Montana Secretary of State
Elections and Voter Services
PO Box 202801
Helena, MT 59620-2801

5. For a local petition, refer to 7-5-101 through 7-5-140, MCA and ask your city or county attorney for assistance. If they are unsure have them contact the Secretary of State’s office at 406-444-9608.
Troubleshooting

• If you are having trouble with getting your petitions processed by the applicable deadline(s), please contact us so that we can assist, since there is no option to extend the deadlines.

• Remember that **statewide** candidate and **political party** qualification petitions need to be processed and sent to the SOS office so that they are received by the SOS within one week of submission to your office.
Troubleshooting

• If you accidentally create **more sheets** in a petition than you need, and you cannot delete the extra sheet(s), just process that sheet’s lines as blank lines, rather than deleting the entire submittal.

• **Please feel free** to reach out to the SOS office with any questions. Also, consider reaching out to other county elections administrators for tips or best practices.
These are the explanations of the sample petition signature sheet for examples of signatures with issues from slide 29:

1. If the signature and other identifying information on the petition is illegible, the signature **cannot** be counted.

2. If the signer is not registered to vote in your county, the signature **cannot** be counted.

3. If, for example, the person signed their registration card with their full name, but signs the petition with initials and their last name, **count** it if the signature taken as a whole is sufficiently similar to the one on file.
4. If the signer does not provide an address nor a telephone number, then the signature cannot be counted.

5. If the signer has already signed the same petition (duplicate signature), the second signature cannot be counted. MT Votes will flag a duplicate.

6. If the signer provides a residence address but not the city or town, you can still count the signature unless there is another reason to reject it.

7. If the signer is registered in a different county than your county, the signature cannot be counted.
Reviewing Signatures

8. If the address or phone number provided by the signer does not match the one on file, but the signature matches and there is no other reason to disqualify the signature, you can still count the signature.

Other tips:
• **Check each** petition signature against the signature on file.
• You **do not** accept the signatures of provisionally registered electors, since they are not legally registered.
• You **accept** the signatures of inactive electors, since they are legally registered.
• You **do not** accept a petition signature if there is a major technical issue with the signature.
• **Accept** a petition signature even if, despite minor technical issues, you believe that the signature is genuine.
Appendix B - Reports

Petition Reports

The **Circulators Report**, also known as the **PM-001 Report**, displays all circulators entered for a petition.

![Circulators Report Example](image)
Petition Reports

The Petition Processing Statistics Report, is the PM-003 Report. It shows the number of accepted and rejected signatures on the petition, and the reasons for the rejected signatures.

<table>
<thead>
<tr>
<th>County: Lake</th>
<th>User Name: User, Lake</th>
</tr>
</thead>
<tbody>
<tr>
<td>Petition Processing Statistics Report</td>
<td>Date: 01/02/2020</td>
</tr>
<tr>
<td>Petition Name: Initiative No. 102</td>
<td>Report No.: PM-003</td>
</tr>
<tr>
<td>Date Filed: 04/15/2015</td>
<td></td>
</tr>
<tr>
<td>Petition Expires: 07/15/2016</td>
<td></td>
</tr>
<tr>
<td>Minimum Signatures Required: 24175</td>
<td></td>
</tr>
<tr>
<td>Total Signatures Processed: 42467</td>
<td></td>
</tr>
</tbody>
</table>

### Petition Information

<table>
<thead>
<tr>
<th>Petition Name</th>
<th>Petition Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiative No. 102</td>
<td>Initiative / Referendum</td>
</tr>
</tbody>
</table>

### Processing Signature Summary

<table>
<thead>
<tr>
<th>Total Accepted Signatures: 27825</th>
<th>Of Those Processed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Rejected Signatures: 13361</td>
<td>Of Those Processed</td>
</tr>
<tr>
<td>Total Blank Line/Crossed Out Signatures: 1281</td>
<td>Of Those Processed</td>
</tr>
</tbody>
</table>

### Rejected Reason

<table>
<thead>
<tr>
<th>Rejected Reason</th>
<th>Total</th>
<th>(%) Rejected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>59</td>
<td>(.4%)</td>
</tr>
<tr>
<td>Duplicate</td>
<td>1238</td>
<td>(9.2%)</td>
</tr>
<tr>
<td>Illegible</td>
<td>765</td>
<td>(5.7%)</td>
</tr>
<tr>
<td>DO NOT USE</td>
<td>883</td>
<td>(6.4%)</td>
</tr>
<tr>
<td>Signature No Match</td>
<td>771</td>
<td>(5.7%)</td>
</tr>
<tr>
<td>Not Registered in County/District</td>
<td>9859</td>
<td>(72.3%)</td>
</tr>
</tbody>
</table>
The **Petition Signers Report**, also known as the **PM-005 Report**, shows the names of all signers on the petition. It has been updated to include **Submittal #**, **Circulator**, and **Processed Date**.

![Petition Signers Report](image)
Petition Reports

The Petition Signature Statistics Report, also known as the PM-006 Report, will display statistics for the petition submittals and signatures.
Petition Reports

Note: Please be careful about releasing statewide petition totals. Petition sponsors or opponents may think the totals are just for your county. Please refer people to the Secretary of State’s office for statewide petition totals.

For local petitions, you may provide totals. PM-003 and PM-009 are useful reports for this purpose. Use a disclaimer if they are not final.
Appendix C

Quick Reference: Petition Processing
Montana Secretary of State
sosmt.gov • soselections@mt.gov

1) For detailed steps on petition processing in MT Votes, go to MT Votes SharePoint. Find under Forms Files and Documents, MT Votes Training, then Petitions. For Tips on processing ballot issue and candidate petitions, visit the Election Officials Resource page. Scroll down and click on Petition Processing Tips and Quick Reference.

2) Check to make sure that both the petition sheets and affidavit are included in the documents submitted to your office. Make sure they are organized, and affidavits are complete before submitting.

3) Provide a receipt documenting how many pages were submitted.

4) If possible, link the circulator to a voter record in MT Votes; if the circulator is not registered to vote, enter the circulator’s information manually.

5) Check each signature. A signature may be counted if the signature, taken as a whole, bears enough similarity to the signature on the registration form to provide reasonable certainty of its authenticity.

6) For statewide ballot issue petitions and statewide candidate or state district candidate petitions, certify the petitions using the MT Votes PM-009 report. Make copies for your records. Using paper or binder clips, attach the signed original certification report to the original affidavit and original signed petition(s), then mail to the SOS by certified mail to PO Box 202801, Helena, MT 59620-2801 so that they are received by the deadline.

7) Call 406-444-9608 or email soselections@mt.gov if you have questions about statewide ballot issue petitions or statewide candidate or state district candidate petitions.

<table>
<thead>
<tr>
<th>Count Signature</th>
<th>Do Not Count Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sufficiently Similar Signature</td>
<td>Non-Matching Signature</td>
</tr>
<tr>
<td>Inactive Registrant</td>
<td>Provisional Registrant</td>
</tr>
<tr>
<td>Late Registrant</td>
<td>Pending-Incomplete Registrant</td>
</tr>
<tr>
<td>Address or Phone # do not match VR record</td>
<td>No Address and No Phone #</td>
</tr>
<tr>
<td>Registered in your county</td>
<td>Not registered in your county</td>
</tr>
</tbody>
</table>