



CHRISTI JACOBSEN
MONTANA SECRETARY OF STATE



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.



Affidavit of Petition Signature Gatherer

An affidavit must be attached to each sheet or section submitted to the election administrator. Separate sheets of a petition may be fastened to this affidavit in sections of not more than 25 sheets.

AFFIDAVIT FILED WITH ELECTION ADMINISTRATOR

I, _____
(printed name of person who is the signature gatherer)

swear that I gathered the signatures on the petition to which this affidavit is attached on the stated dates, that I believe the signatures on the petition are genuine, are the signatures of the persons whose names they purport to be, and are the signatures of Montana electors who are registered at the address or have the telephone number following the person's signature, and that the signers knew the contents of the petition before signing the petition.

Date on which the first signature attached was gathered

(Do NOT sign on the line below before gathering the signatures on the petition(s) that you attach to this affidavit.)

Signature of petition signature gatherer

Address of petition signature gatherer

City, state and zip code

NOTARY OR AUTHORIZED OFFICER – DO NOT FILL OUT THIS SECTION UNTIL AFTER THE SIGNATURES GATHERED HAVE BEEN ATTACHED TO THIS AFFIDAVIT

State of Montana
County of _____

Signed and sworn to before me this _____ day of _____, 20____ by _____
Printed Name of Signature Gatherer

Where to file Petition and Affidavit:
County Election Administrator's Office
A list of county election offices may be found at: sosmt.gov/elections

Signature of Notary or Public Official

[SEAL/STAMP]

Updated July 25, 2019



Unsworn Declaration of Petition Signature Gatherer Under Penalty of Perjury Pursuant to §1-6-105

An affidavit as defined by 1-1-203 must be attached to each sheet or section submitted to the election administrator. Separate sheets of a petition may be fastened to this affidavit in sections of not more than 25 sheets.

AFFIDAVIT FILED WITH ELECTION ADMINISTRATOR

I, Daffy Duck
(printed name of person who is the signature gatherer)

swear that I gathered the signatures on the petition to which this affidavit is attached on the stated dates, that I believe the signatures on the petition are genuine, are the signatures of the persons whose names they purport to be, and are the signatures of Montana electors who are registered at the address or have the telephone number following the person's signature, and that the signers knew the contents of the petition before signing the petition.

10-19-2019
Date on which the first signature attached was gathered

(Do NOT sign on the line below before gathering the signatures on the petition(s) that you attach to this affidavit.)

Daffy Duck
Signature of petition signature gatherer

123 Lakeview Blvd
Address of petition signature gatherer

Helena MT 59602
City, state and zip code

1-6-105, MCA UNSWORN DECLARATION EXECUTED UNDER PENALTY OF PERJURY – DO NOT FILL OUT THIS SECTION UNTIL AFTER THE SIGNATURES GATHERED HAVE BEEN ATTACHED TO THIS AFFIDAVIT

Insert the following within the text space below:

"I [Insert Name] declare under penalty of perjury that the foregoing is true and correct"

I, Daffy Duck, declare under penalty of perjury that the foregoing is true and correct.

Where to file Petition and Affidavit:
County Election Administrator's Office
A list of county election offices may be found at: sosmt.gov/elections

Dated on this 1st day of April, 2020 by

DAFFY DUCK
Printed Name of Signature Gatherer

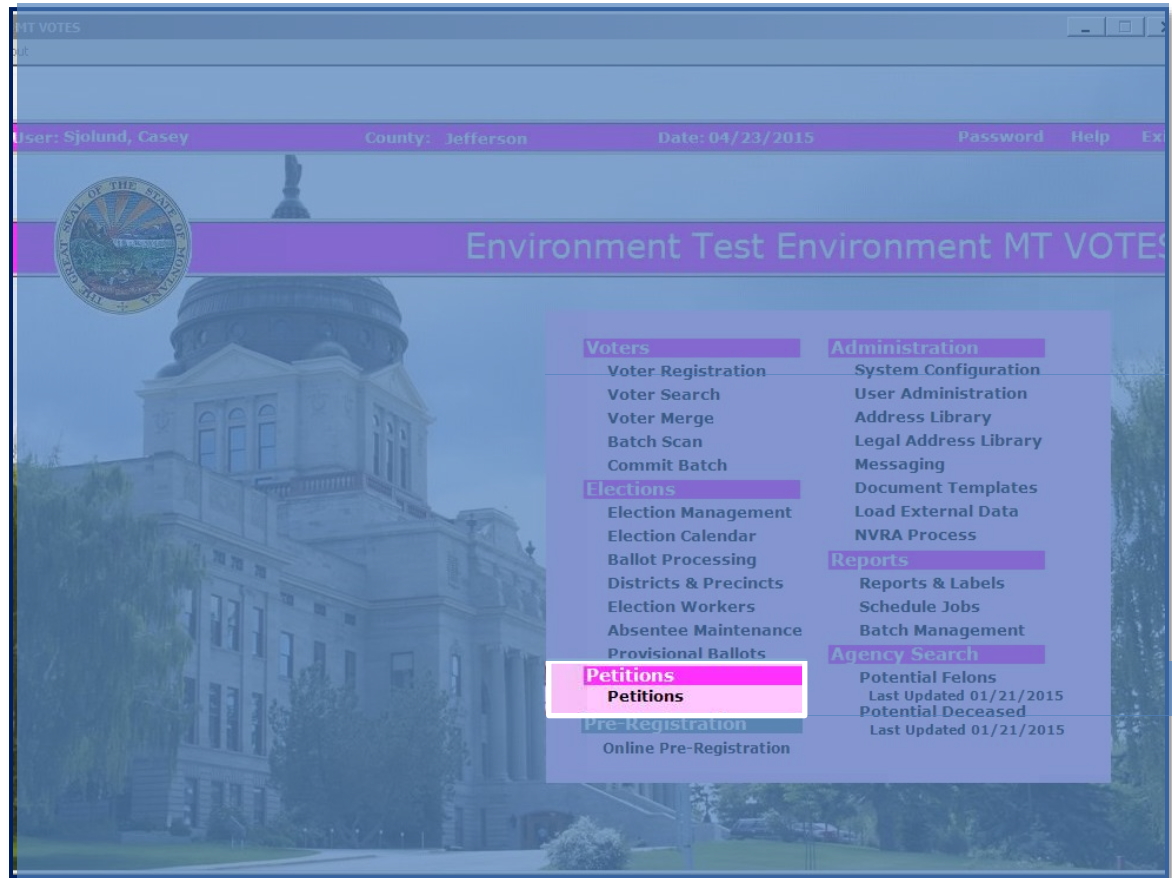
Daffy Duck
Signature

Creating Petitions

Secretary of State
Corey Stapleton



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**”.

Petitions

Query executed successfully. [Voter Search](#) [Help](#)

Search

Petition # Status

Title

District Types District

Search Results

Petition Number	Title	Petition Type	District (District Type)
I-177	Initiative No. 177	Initiative / Refe...	Montana (STATEWIDE)
CI-115	Constitutional Initiative No. 115	Initiative / Refe...	Montana (STATEWIDE)
CI-116	Constitutional Initiative No. 116	Initiative / Refe...	Montana (STATEWIDE)
GLACIER 2015-...	TREASURER RECALL PETITION	Recall	Glacier (COUNTYWIDE)
I-178	Initiative No. 178	Initiative / Refe...	Montana (STATEWIDE)
Bernie Sanders...	Bernie Sanders for President 2016	Candidate	Montana (STATEWIDE)
Donald Trump ...	Donald Trump for President 2016	Candidate	Montana (STATEWIDE)
Hillary Clinton ...	Hillary Clinton for President 2016	Candidate	Montana (STATEWIDE)
Ben Carson 20...	Ben Carson for President 2016	Candidate	Montana (STATEWIDE)
Marco Rubio 20...	Marco Rubio for President 2016	Candidate	Montana (STATEWIDE)
Ted Cruz 2016	Ted Cruz for President 2016	Candidate	Montana (STATEWIDE)
Jeb Bush 2016	Jeb Bush for President 2016	Candidate	Montana (STATEWIDE)
Chris Christie 2...	Chris Christie for President 2016	Candidate	Montana (STATEWIDE)
Carly Fiorina 2...	Carly Fiorina for President 2016	Candidate	Montana (STATEWIDE)
Rand Paul 2016	Rand Paul for President 2016	Candidate	Montana (STATEWIDE)
I-179	Initiative No. 179	Initiative / Refe...	Montana (STATEWIDE)

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.

Petitions

Petition Circulators Signatures Reports

[Voter Search](#) [Help](#)

Petition Description

Filling Officer: Gallatin Group: [Group Information](#)

Petition #: 1234 District: MANHATTAN CITYWIDE - CW-MAN

Type: Initiative / Referendum Scope: City Status: Active

Title: Example Petition 1234

Summary: This is an example of a petition.

Date Filed: 01/08/2014 Certified Date: Election Date: 11/05/2014

Start Circulation: 01/08/2014 End Circulation: 10/05/2014 Req'd Signatures: 10000 Max Lines:

Circulator(s)

Name:

[New](#) [Detail](#) [Delete](#)

Signature Statistics

County	Signature	Size	Accepted	Rejected	Remaining
<input type="text"/>					

[Delete](#) [Preprocess Sheets](#) [Process Signatures](#)

[Refresh](#)

Candidate

Position:

Name:

[New](#) [Detail](#) [Delete](#)

Process Signatures

Submittal #: [Process](#)

[Save](#) [Close](#)

Circulators

Circulators are
Signature Gatherers

Petitions Screen:

- To add circulators,
click on the petition
to select it.

- Click **Detail**.



CHRISTI JACOBSEN
MONTANA SECRETARY OF STATE



Petitions Petition Search Reports

Query executed successfully. [Voter Search](#) [Help](#)

Search

Petition # Status

Title

District Types District

Search Results

Petition Number	Title	Petition Type	District (District Type)
I-177	Initiative No. 177	Initiative / Refe...	Montana (STATEWIDE)
CI-115	Constitutional Initiative No. 115	Initiative / Refe...	Montana (STATEWIDE)
CI-116	Constitutional Initiative No. 116	Initiative / Refe...	Montana (STATEWIDE)
GLACIER 2015-...	TREASURER RECALL PETITION	Recall	Glacier (COUNTYWIDE)
I-178	Initiative No. 178	Initiative / Refe...	Montana (STATEWIDE)
Bernie Sanders...	Bernie Sanders for President 2016	Candidate	Montana (STATEWIDE)
Donald Trump ...	Donald Trump for President 2016	Candidate	Montana (STATEWIDE)
Hillary Clinton ...	Hillary Clinton for President 2016	Candidate	Montana (STATEWIDE)
Ben Carson 20...	Ben Carson for President 2016	Candidate	Montana (STATEWIDE)
Marco Rubio 20...	Marco Rubio for President 2016	Candidate	Montana (STATEWIDE)
Ted Cruz 2016	Ted Cruz for President 2016	Candidate	Montana (STATEWIDE)
Jeb Bush 2016	Jeb Bush for President 2016	Candidate	Montana (STATEWIDE)
Chris Christie 2...	Chris Christie for President 2016	Candidate	Montana (STATEWIDE)
Carly Fiorina 2...	Carly Fiorina for President 2016	Candidate	Montana (STATEWIDE)
Rand Paul 2016	Rand Paul for President 2016	Candidate	Montana (STATEWIDE)
I-179	Initiative No. 179	Initiative / Refe...	Montana (STATEWIDE)

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.

The screenshot shows the 'Petitions' application window. The 'Petition Description' section contains the following information:

- Filing Officer: STATE OF MT
- Petition #: I-175 (circled in red)
- Group: [Empty]
- District: Montana
- Type: Initiative / Referendum
- Scope: State
- Status: Active
- Title: Initiative No. 175
- Summary: Allow any school employee, with a valid permit, to possess and carry a concealed handgun in a school.
- Date Filed: 08/28/2015
- Certified Date: [Empty]
- Election Date: 11/08/2016
- Start Circulation: 08/28/2015
- End Circulation: 07/15/2016
- Req'd Signatures: 24175
- Max Lines: [Empty]

The 'Circulator(s)' section (circled in red) contains a table with one entry:

Name
BILLI, CHET A

Below the table is a 'New' button (circled in red), along with 'Detail' and 'Delete' buttons.

The 'Signature Statistics' section contains a table with the following columns: Signature, Size, Accepted, Rejected, Remaining.

The 'Candidate' section contains a 'Position' dropdown and a 'Name' text box, with 'New', 'Detail', and 'Delete' buttons below.

The 'Process Signatures' section contains a 'Submittal #' text box and a 'Process' button.

At the bottom of the window are 'Refresh', 'Save', and 'Close' buttons.

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.

The screenshot shows the 'Circulators' application window. The 'General Information' section contains the following fields:

Petition #	Voter ID	Last Name	First Name	Middle Name	Name Suffix	Effective Date	Expiration Date
TestVoter	450131639	VOTER	TEST				

The 'Link to Voter' button is circled in red. The 'Contact Information' section has tabs for 'Address' and 'Contact'. The 'Address' tab is selected, showing a table with the following data:

Address Type	Address	Last Updated
Mailing		
Resident Addr...		
Residence	WHITEHALL, MT 59759	06/10/2015
Work Address		

The 'List of Circulators' table is empty. The 'Save' and 'Close' buttons at the bottom are circled in red.

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.

Petitions

No matching results found. (0 Results)

[Voter Search](#) [Help](#)

Search

General | Residential Address | Mailing Address

Last Name

First Name

Middle Name

☐ Soundex

Voter ID

Birth Date From

Birth Date To

Scope

☐ State ☒ County

Gallatin

Search

Clear

Search Results

Voter ID	Name	Residential Address	Status	Date of Birth

[View Summary](#)

Select

Close

Circulators

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.

The screenshot shows the 'Circulators' application window. The 'Contact Information' section is highlighted with a red circle. Below it, the 'Detail' button is also circled in red. The 'List of Circulators' table is visible at the bottom.

General Information

Petition # Voter ID

Last Name First Name Middle Name

Name Suffix Effective Date Expiration Date

Contact Information

Address | Contact

Address Type	Address	Last Updated
Mailing		
Resident Addr...		
Residence		
Work Address		

List of Circulators

Last Name	First Name	Middle Name	Voter ID	Effective Date	Expiration Date
LEWIS	DAVID				
SMITH	CLYDE				
MILLER	DANIEL	G			
SAUERS	CAMILLE				
PHELPS	MICHAEL				
BRAUN	DONNA				
BRYANT	VALERIE	L			
SMITH	KATIE	I			

Circulators

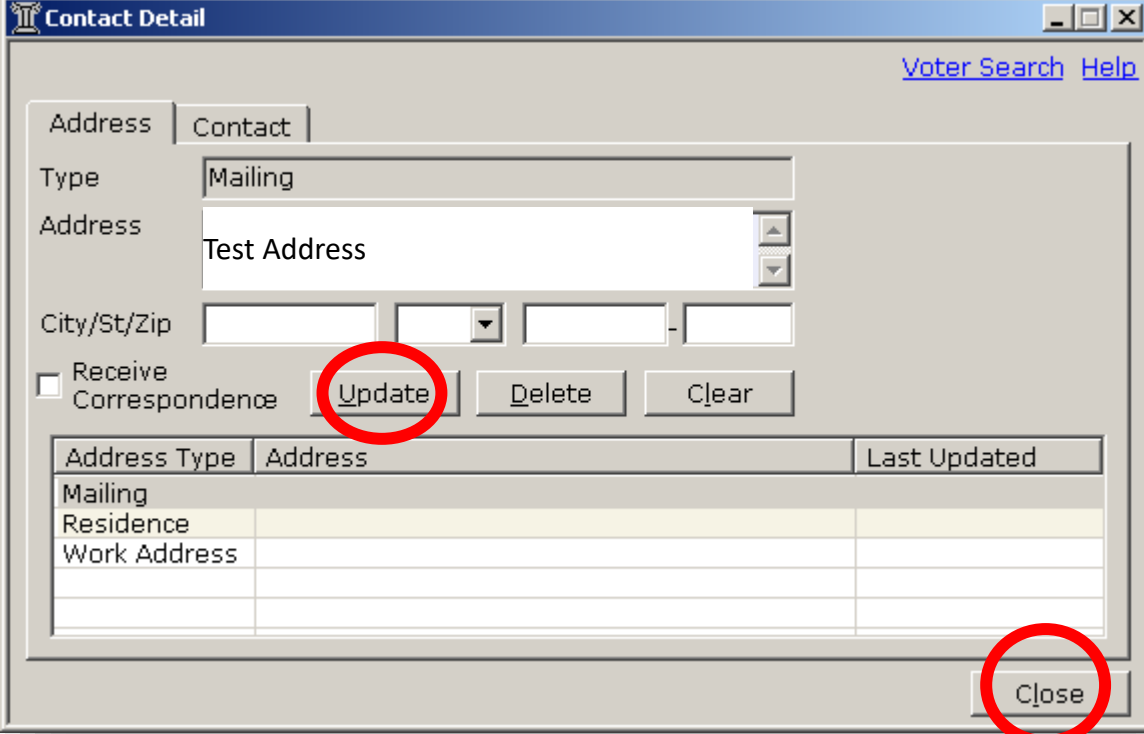
Contact Detail

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.



The screenshot shows a 'Contact Detail' window with a blue title bar and standard window controls. In the top right corner, there are links for 'Voter Search' and 'Help'. The window has two tabs: 'Address' and 'Contact', with 'Contact' currently selected. Below the tabs, there are input fields for 'Type' (set to 'Mailing'), 'Address' (containing 'Test Address'), and 'City/St/Zip' (with separate boxes for each part). A checkbox labeled 'Receive Correspondence' is unchecked. To the right of this checkbox are three buttons: 'Update', 'Delete', and 'Clear'. The 'Update' button is circled in red. Below these fields is a table with three columns: 'Address Type', 'Address', and 'Last Updated'. The table contains three rows: 'Mailing', 'Residence', and 'Work Address'. The 'Residence' row is highlighted in yellow. At the bottom right of the window, there is a 'Close' button, which is also circled in red.

Address Type	Address	Last Updated
Mailing		
Residence		
Work Address		

Petition Preprocessing

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.



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MONTANA SECRETARY OF STATE

Edit Petition

Petition Circulators Signatures Reports

[Voter Search](#) [Help](#)

Petition Description

Filing Officer: Group: [Group Information](#)

Petition #: District:

Type: Scope: Status:

Title:

Summary:

Date Filed: Certified Date: Election Date:

Start Circulation: End Circulation: Req'd Signatures: Max Lines:

Circulator(s)

Name
VOTER, TEST

[New](#) [Detail](#) [Delete](#)

Signature Statistics

Signature	Size	Accepted	Rejected	Remaining

[Delete](#) [Preprocess Sheets](#) [Process Signatures](#)

[Refresh](#)

Candidate

Position:

Name:

[New](#) [Detail](#) [Delete](#)

Process Signatures

Submittal #: [Process](#)

[Save](#) [Close](#)

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**.

[illegible]

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.

Sample Petition Sheet

Signature	Signed	
1. <i>Chant</i>	9/12	13 Bozeman Trail Rd
2. <i>Lynsey</i>	7/12	517 Jay Ln Belgrade
3. <i>Shonda J. Jones</i>	3/9/12	SN 24th Ave Unit C Boz
4. <i>Andrea M. McRee</i>	3/9/12	1455 Kent Dr Helena
5. <i>Clara Schuler</i>	3/9/12	399 Galtway Ave
6. <i>[Signature]</i>		
7. <i>[Signature]</i>	3/14/12	243 Brahma
8. <i>Tracy Vinner</i>	10/12	100 THE HILL Winnetka MT 59741
9. <i>Mark S. Davis</i>	3/10/12	3650 MAGENTA BOZEMAN MT 59718
10. <i>Sue Smith</i>	3/17/12	2010 W Mendon Boz MT

1. Signatures of registered voters qualify. 2. Collect voters' signatures from only one county per sheet. 3. Check potential signer the initiative text and explanation statements printed on the petition. 5. Sign, notarize p to 25 petition sheets from the same county can be attached to one affidavit). 6. You must have signatures dated after the date the affidavit is notarized. 8. Don't fill in the legislative

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

Signature	Signed	
1. <i>Chant</i>	9/12	13 Bozeman Trail Rd
2. <i>Lynsey</i>	7/12	515 E Jay Ln Belgrade
3. <i>Shonda J. Jones</i>	3/9/12	8N. 24th Ave Unit C Boz
4. <i>Andrew Walker</i>	3/9/12	4155 Kent Dr Helena
5. <i>Cindy Schuler</i>	3/9/12	399 Gid-Hey Ave
6. <i>[Signature]</i>		
7. <i>[Signature]</i>	3/14/12	243 Brahma
8. <i>[Signature]</i>	1/10/12	100 THE H Land Whitton MT 59741
9. <i>[Signature]</i>	3/10/12	3650 MAGENTA BOZEMAN MT 59718
10. <i>[Signature]</i>	3/12/12	6010 W Mendota Boz MT

Gallatin

tures of registered voters qualify. 2. Collect voters' signatures from only one county per sheet. 3. Check potential signer the initiative text and explanation statements printed on the petition. 5. Sign, notarize p to 25 petition sheets from the same county can be attached to one affidavit). 6. You must have ures dated after the date the affidavit is notarized. 8. Don't fill in the legislative

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 Summary

Petition #: TestVoter Title: 2015 Test Voter Candidate for City Electn...
County: Jefferson Submittal: 1 Auto Assign Current Submittals: 0
Circulator: VOTER, TEST

Receive Bulk Sheets

Accepted Sheet: 2 Receive Sheets: Last Good Line: Save

Sheet Information

Max Lines: Approval Date: 06/10/2015 GOTO: Save & Next Save
Page #: 1 Last Good Line: 10 GOTO: Save

Line	Code	Description
1	1	Good
2	1	Good
3	1	Good
4	1	Good
5	1	Good
6	1	Good
7	1	Good
8	1	Good
9	1	Good
10	1	Good

Code	Description
1	Good
2	Crossed out
3	Blank
4	No signature

Label Complete Clear Close

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.

The screenshot shows the 'Preprocess Sheets' application window. The 'Petition Summary' section includes fields for 'Petition #', 'Title', 'County', 'Submittal', 'Circulator', and 'Current Submittals'. The 'Receive Bulk Sheets' section has fields for 'Accepted Sheet', 'Receive Sheets', and 'Last Good Line', along with a 'Save' button. The 'Sheet Information' section includes fields for 'Max Lines', 'Approval Date', 'Page #', and 'Last Good Line', along with a 'GOTO' field and 'Save & Next' and 'Save' buttons. The 'Save & Next' and 'Save' buttons are circled in red. Below these sections are two tables: 'Line' and 'Code' with 'Description'.

Line	Code	Description
1	1	Good
2	1	Good
3	2	Crossed out
4	4	No signature
5	4	No signature
6	4	No signature
7	3	Blank
8	3	Blank
9	3	Blank
10	3	Blank

Code	Description
1	Good
2	Crossed out
3	Blank
4	No signature

At the bottom of the window are buttons for 'Label', 'Complete', 'Clear', and 'Close'.

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.

Petition Summary		
Petition #:	TestVoter	Title: 2015 Test Voter Candidate for City Electn...
County	Jefferson	Submittal 1 Auto Assign Current Submittals 0
Circulator	VOTER, TEST	

Receive Bulk Sheets		
Accepted Sheet	2	Receive Sheets
Last Good Line		Save

Sheet Information		
Max Lines		Approval Date 06/10/2015
Page #	2	Last Good Line 10 GOTO Save & Next Save

Line	Code	Description
1	1	Good
2	3	Blank
3	3	Blank
4	3	Blank
5	3	Blank
6	3	Blank
7	3	Blank
8	3	Blank
9	3	Blank
10	1	Good

Code	Description
1	Good
2	Crossed out
3	Blank
4	No signature

Label
Complete
Clear
Close

Petition Preprocessing

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.

Preprocess Sheets

[Voter Search](#) [Help](#)

Petition Summary

Petition #: TestVoter Title: 2015 Test Voter Candidate for City Electn...

County: Jefferson Submittal: 1 Auto Assign Current Submittals: 0

Circulator: VOTER, TEST

Receive Bulk Sheets

Accepted Sheet: 2 Receive Sheets: Last Good Line: Save

Sheet Information

Max Lines: Approval Date: 06/10/2015 GOTO: Save & Next

Page #: 2 Last Good Line: 10 GOTO: Save

Line	Code	Description
1	1	Good
2	3	Blank
3	3	Blank
4	3	Blank
5	3	Blank
6	3	Blank
7	3	Blank
8	3	Blank
9	3	Blank
10	1	Good

Code	Description
1	Good
2	Crossed out
3	Blank
4	No signature

Label Complete Clear Close

7/7 Backward Forward Save As... Close

I-174
Submittal #: 9

Barcode

Petition Preprocessing

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

Click them in this order.

The screenshot shows the 'Preprocess Sheets' application window. It contains several sections for data entry and processing:

- Petition Summary:** Includes fields for 'Petition #' (TestVoter), 'Title' (2015 Test Voter Candidate for City Electn...), 'County' (Jefferson), 'Submittal' (1), 'Circulator' (VOTER, TEST), and 'Current Submittals' (0).
- Receive Bulk Sheets:** Includes 'Accepted Sheet' (2), 'Receive Sheets' (empty), 'Last Good Line' (empty), and a 'Save' button.
- Sheet Information:** Includes 'Max Lines' (empty), 'Approval Date' (06/10/2015), 'Page #' (2), 'Last Good Line' (10), and a 'GOTO' field.
- Tables:** Two tables are displayed side-by-side, showing line numbers, codes, and descriptions.

At the bottom of the window, there are four buttons: 'Label', 'Complete', 'Clear', and 'Close'. The 'Complete', 'Clear', and 'Close' buttons are circled in red, indicating the sequence of actions to be taken.

Line	Code	Description
1	1	Good
2	3	Blank
3	3	Blank
4	3	Blank
5	3	Blank
6	3	Blank
7	3	Blank
8	3	Blank
9	3	Blank
10	1	Good

Code	Description
1	Good
2	Crossed out
3	Blank
4	No signature

Processing Signatures



CHRISTI JACOBSEN
MONTANA SECRETARY OF STATE



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.

Edit Petition

Petition Circulators Signatures Reports

[Voter Search](#) [Help](#)

Petition Description

Filing Officer: Jefferson Group: [] [Group Information](#)

Petition #: TestVoter District: WHITEHALL CITY - CW_W

Type: Candidate Scope: City Status: Active

Title: 2015 Test Voter Candidate for City Election

Summary: Test Voter for City Election

Date Filed: 06/10/2015 Certified Date: [] Election Date: 09/01/2015

Start Circulation: 06/10/2015 End Circulation: 07/01/2015 Req'd Signatures: 10 Max Lines: []

Circulator(s)

Name
VOTER, TEST

New Detail Delete

Signature Statistics

Signature	Size	Accepted	Rejected	Remaining
1 - 1	12	0	0	12

Delete Preprocess Sheets Process Signatures

Candidate

Position: []

Name: []

New Detail Delete

Process Signatures

Submittal #: [] Process

Refresh Save Close

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.

[illegible]

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.

Signature Processing
Signature Options Reports

Voter Search Help

Petition #: TestVoter Title: 2015 Test Voter Candidate for City Election Petition Status: Active

Submit: 1

Last Name voter First Name test Phone Number House #

Street Name City Zip

Mailing Address City/St/Zip

Country ☐ Secondary Statewide Search ☐ Search Soundex ☐ Search Statewide Clear Search

Save

Status Reason Sheet # 1 Line # 1

Name Processed Date 06/10/2015 Record Has Not Been Processed Edit

Comment ☐ Mark For Later Review Save & Prev Save & Next Save

Jurisdiction Jefferson F8 - No Match, Save & Next F9 - Accept, Save & Next F10 - Select, Focus On Reason
F11 - Not Registered, Focus On Name F12 - Not Registered, Save & Next

Signatures	Status	Name	Address	Mailing Address
	Active	VOTER TEST	WHITEHALL MT 59759	

Review Registration Full Image Show All Select Not Registered Close

Processing Signatures

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**”.

Signature Processing

Signature Options Reports

Voter Search Help

Petition #: TestVoter Title: 2015 Test Voter Candidate for City Election Petition Status: Active

Submittal: 1

Search

Last Name: voter First Name: test Phone Number: House #: Street Name: City: Zip: City/St/Zip: Country: ☐ Secondary Statewide Search Search Soundex ☐ Search Statewide Clear Search

Mailing

Address: City/St/Zip: Country: ☐ Secondary Statewide Search Search Soundex ☐ Search Statewide Clear Search

Save

Status: Reason: Name: Comment: Processed Date: 06/10/2015 Record Has Not Been Processed Edit Mark For Later Review Save & Prev Save & Next Save

Jurisdiction: Jefferson F8 - No Match, Save & Next F9 - Accept, Save & Next F10 - Select, Focus On Reason F11 - Not Registered, Focus On Name F12 - Not Registered, Save & Next

Signatures	Status	Name	Address	Mailing Address
	Active	VOTER TEST	WHITEHALL MT 59759	

Review Registration Full Image Show All Select Not Registered Close

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.

Signature Processing
Signature Options Reports

[Voter Search](#) [Help](#)

Petition #: TestVoter **Title:** 2015 Test Voter Candidate for City Election **Petition Status:** Active
Submittal: 1

Search
Last Name: voter First Name: test Phone Number: City: House #: Street Name: City: Zip: Country: ☐ Secondary Statewide Search ☐ Search Soundex ☐ Search Statewide

Mailing
Address: City/St/Zip: Country: ☐ Secondary Statewide Search ☐ Search Soundex ☐ Search Statewide

Save
Status: Reason: Sheet #: 1 Line #: 1
Name: Processed Date: 06/10/2015 Record Has Not Been Processed
Comment: ☐ Mark For Later Review

Jurisdiction: Jefferson F8 - No Match, Save & Next F9 - Accept, Save & Next F10 - Select, Focus On Reason
F11 - Not Registered, Focus On Name F12 - Not Registered, Save & Next

Signatures	Status	Name	Address	Mailing Address
	Active	VOTER TEST	WHITEHALL MT 59759	

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.

The screenshot shows the 'Signature Processing' application window. At the top, it displays 'Petition #: TestVoter', 'Title: 2015 Test Voter Candidate for City Election', and 'Petition Status: Active'. Below this is a 'Search' section with fields for Last Name (voter), First Name (test), Phone Number, House #, Street Name, City, and Zip. A 'Mailing' section includes fields for Address, City/St/Zip, and Country, along with checkboxes for 'Secondary Statewide Search', 'Search Soundex', and 'Search Statewide'. The 'Save' section has a 'Status' dropdown menu set to 'Accepted' (highlighted with a red circle), a 'Reason' field, and a 'Processed Date' of 06/11/2015. The 'Save & Next' button is also highlighted with a red circle. At the bottom, there is a table with columns: Signatures, Status, Name, Address, and Mailing Address. The table contains one row with 'Active' status, 'VOTER TEST' name, and 'ST WHITEHALL MT 59759' address. The bottom of the window features buttons for 'Review Registration', 'Full Image', 'Show All', 'Select', 'Not Registered', and 'Close'.

Signatures	Status	Name	Address	Mailing Address
	Active	VOTER TEST	ST WHITEHALL MT 59759	

Sample Petition Signature Sheet

						For County Election Office Use Only	
Training Note: Counted or Not?		Signature	Date Signed	Residence Address or P.O. Address or Home Phone	Printed Last Name, First and Middle Initials	Legis. Rep. Dist. #	Rsvd
1	Not counted: All information is illegible	Vladimir Putin	1-7	WvZzKwA	AwKkww		
2	Not counted: Not registered in Montana	Vladimir Putin	1-7	1 Crimea Way, Kiev, Russia	Putin, V		
3	Counted: Even though the signature on file is <i>Gerry Tall</i> , count if the signature on file, when taken as a whole, matches the one on file	G. R. Tall	1-7	100 South Western, Helena, MT 59601	Tall, G.R.		
4	Not counted: Elector provided no residence address, PO Box, or phone #	Skip Tracy	1-7		Tracy, S.M.		
5	Not counted: Attempted duplicate of Signature 3	G. R. Tall	1-7	100 South West, Helena, MT	Tall, G.R.		
6	Counted: Even though no town or city listed, as long as you can identify the voter	Sherry Bobbins	1-7	100 Mountain Ave.	S.C. Bobbins		
7	Not counted: Not registered in county indicated below.	Moe White	1-7	100 Yell Lane, Billings, MT	White, M. R.		
8	Counted: Even though address does not match address on file, since signature matches	Ed Anders	1-7	100 1st, Helena, MT 59101	Anders, E.		

Signers do not fill in this section; it is for optional election office use only

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.

Signature Processing

Signature Options Reports

Voter record has been saved. [Voter Search](#) [Help](#)

Petition #: TestVoter Title: 2015 Test Voter Candidate for City Election Petition Status: Active

Submittal: 1

Search

Last Name First Name Phone Number House #

Street Name City Zip

Mailing

Address City/St/Zip

Country ☐ Secondary Statewide Search ☐ Search Soundex ☐ Search Statewide [Clear](#) [Search](#)

Save

Status Reason Sheet # 1 Line # 2

Name Test Voter 2 Processed Date 06/11/2015 Record Has Not Been Processed [Edit](#)

Comment ☐ Mark For Later Review [Save & Prev](#) [Save & Next](#) [Save](#)

Jurisdiction Jefferson F8 - No Match, Save & Next F9 - Accept, Save & Next F10 - Select, Focus On Reason
F11 - Not Registered, Focus On Name F12 - Not Registered, Save & Next

Signatures	Status	Name	Address	Mailing Address
------------	--------	------	---------	-----------------

[Review Registration](#) [Full Image](#) [Show All](#) [Select](#) [Not Registered](#) [Close](#)

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**.

The screenshot shows the 'Signature Processing' software window. At the top, a green status bar says 'Voter record has been saved.' Below this, the 'Petition #' is 'TestVoter' and the 'Title' is '2015 Test Voter Candidate for City Election'. The 'Petition Status' is 'Active'. The 'Submittal' is '1'. The 'Search' section contains fields for Last Name, First Name, Phone Number, House #, Street Name, City, and Zip. The 'Mailing' section contains fields for Address, City/St/Zip, and Country. The 'Save' section has a Status dropdown set to 'A', a Reason dropdown, and a Name field containing 'Test Voter 2'. The 'Processed Date' is '06/11/2015'. The 'Record Has Not Been Processed' checkbox is checked. The 'Save & Next' button is circled in red. The 'Sheet #' is '1' and the 'Line #' is '2', both circled in red. The bottom of the window has a 'Review Registration' button, a 'Full Image' button, a 'Show All' button, a 'Select' button, a 'Not Registered' button (circled in red), and a 'Close' button.

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**.

The screenshot displays the 'Signature Processing' application window. At the top, there are tabs for 'Signature', 'Options', and 'Reports'. The main form area is pink and contains the following fields: 'Petition #: I-184', 'Title: Initiative No. 184', and 'Petition Status: Active'. Below this is a 'Submittal: 1' section with a 'Search' button. The search fields include 'Last Name' (mills), 'First Name' (test), 'Middle Name', and 'Phone Number'. There are also fields for 'House #', 'Street Name', 'City', 'Zip', and 'Country'. A 'Mailing Address' section is also present. The 'Save' section has a 'Status' dropdown menu with 'Accepted' selected (circled in red), a 'Reason' field, and 'Sheet #' and 'Line #' fields. There are buttons for 'Name', 'Comment', 'Processed Date' (01/29/2018), 'Record Has Not Been Processed', 'Edit', 'Mark For Later Review', 'Save & Prev', 'Save & Next', and 'Save'. A 'Voter Validations' pop-up window is open, showing a 'Validation Messages' section with the message 'The voter has already signed this petition 2 time(s)' (circled in red). The bottom of the window has a navigation bar with buttons for 'Review Registration', 'Full Image', 'View Voter Record', 'Show All', 'Select', 'Not Registered', and 'Close'.

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**.

Petition #: I-187		Title: Initiative No. 187		Petition Status: Active						
Submittal: 1										
Search										
Last Name <input type="text"/>		First Name <input type="text"/>		Middle Name <input type="text"/>						
House # <input type="text"/>		Street Name <input type="text"/>		City <input type="text"/>						
Mailing Address <input type="text"/>		City/St/Zip <input type="text"/>		Zip <input type="text"/>						
Country <input type="text"/>		<input type="checkbox"/> Secondary Statewide Search		<input type="checkbox"/> Search Soundex						
		<input type="checkbox"/> Search Statewide		<input type="button" value="Clear"/> <input type="button" value="Search"/>						
Save										
Status <input type="text" value="Rejected"/>		Reason <input type="text" value="Not Registered in County/District - NR"/>		Sheet # <input type="text" value="1"/> Line # <input type="text" value="3"/>						
Name <input type="text"/>				<input type="button" value="Edit"/>						
Comment <input type="text"/>				<input type="button" value="Save & Next"/> <input type="button" value="Save"/>						
Jurisdiction Beaverhead		F7 - Sa		F10 - Select, Focus On Reason						
		Other - OTH		- Not Registered, Save & Next						
<table border="1"><thead><tr><th>Signatures</th><th>Status</th><th>Name</th><th>Address</th><th>Mailing Address</th></tr></thead></table>						Signatures	Status	Name	Address	Mailing Address
Signatures	Status	Name	Address	Mailing Address						

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**.

Signatures	Status	Name	Address	Mailing Address
	Active	VOTER TEST	WHITEHALL MT 59759	

[Review Registration](#) [Full Image](#) [Show All](#) [Select](#) [Not Registered](#) [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.

Petition Signature Query
Process Options Reports

Query executed successfully. Showing 12 results. [Voter Search](#) [Help](#)

Petition #: TestVoter Title: 2015 Test Voter Candidate for City Election Petition Status: Active
Submittal: 1 Signature 1 Signature Size: 12 Accepted: 1 Rejected: 11 Remaining: 0

Search
From Page To Status Reason
Date Processed Page # Line # Voter ID Clear Search

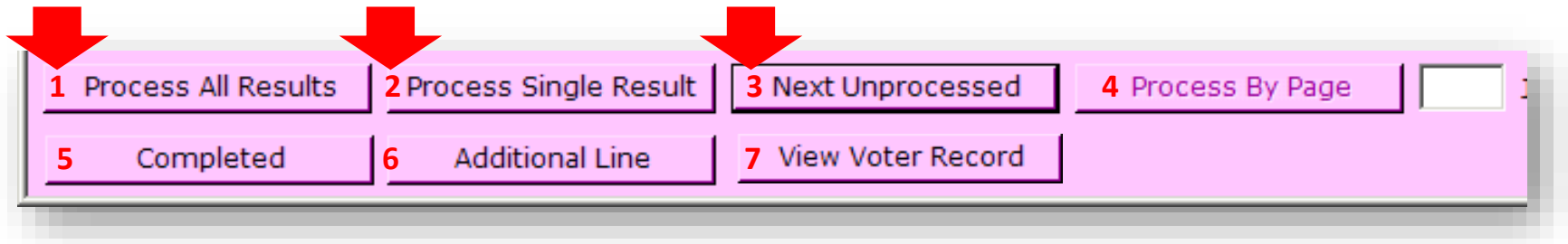
Signature	Page	Line	Name	Address	Voter ID	Sign Status	Sign Reason
1	1	1	VOTER, TEST	WHITEHALL MT 59759	450131...	Accepted	
1	1	2	Name not registered			Rejected	Not Regist...
1	2	1	VOTER, TEST	WHITEHALL MT 59759	450131...	Rejected	Duplicate
1	2	2	Joe Schmo			Rejected	Not Regist...
1	2	3	Jane Doe			Rejected	Not Regist...
1	2	4	John Doe			Rejected	Not Regist...
1	2	5	Sam Davies			Rejected	Not Regist...
1	2	6	dan martins			Rejected	Not Regist...
1	2	7	Roger Sellers			Rejected	Not Regist...
1	2	8	Stan Kubrick			Rejected	Not Regist...
1	2	9	William Murray			Rejected	Not Regist...
1	2	10	Wes Anderson			Rejected	Not Regist...

Process All Results Process Single Result Next Unprocessed Process By Date
Completed Close

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

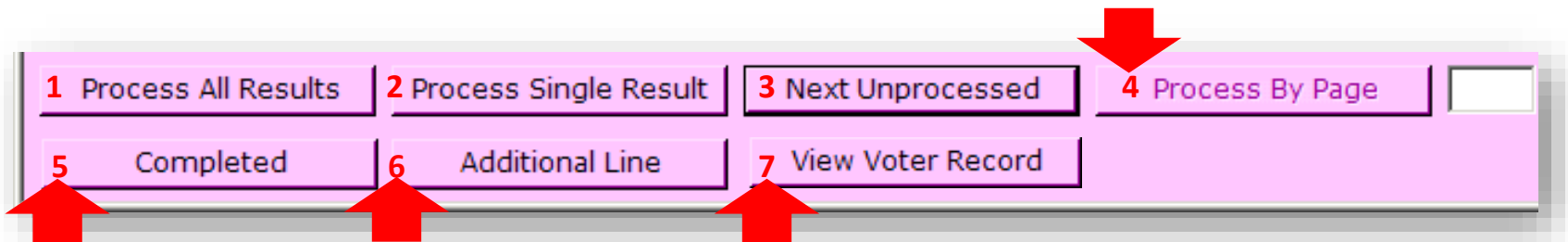
Review of Options on Petition Signature Query Screen

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.



Processing Signatures

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**.

Edit Petition

Petition Circulators Signatures Reports

The record has been updated successfully. [Voter Search](#) [Help](#)

Petition Description

Filing Officer: Gallatin Group: [Group Information](#)

Petition #: 1234 District: MANHATTAN CITYWIDE - CW-MAN

Type: Initiative / Referendum Scope: City Status: Not Qualified

Title: Example Petition 1234

Summary: This is an example of a petition.

Date Filed: 01/08/2014 Certified Date: Election Date: 11/05/2014

Start Circulation: 01/08/2014 End Circulation: 10/05/2014 Req'd Signatures: 10000 Max Lines: 25

Circulator(s)

Name	Circulator, Test
MURRAY, ZACHARY ROBERT	

[New](#) [Detail](#) [Delete](#)

Signature Statistics

Signature	Size	Accepted	Rejected	Remaining
1 - 1	27	1	26	0

[Delete](#) [Preprocess Sheet](#) [Process Signatures](#)

[Refresh](#)

Candidate

Position: Name: [New](#) [Detail](#) [Delete](#)

Process Signatures

Submittal #: [Process](#)

[Save](#) [Close](#)

Processing Signatures

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.)

The screenshot shows the 'Edit Petition' interface with a green success message at the top: 'The record has been updated successfully.' Below this, the 'Petition Description' section contains the following fields:

- Filling Officer: Gallatin
- Petition #: 1234
- Type: Initiative / Referendum
- Title: Example Petition 1234
- Summary: This is an example of a petition.
- Date Filed: 01/08/2014
- Start Circulation: 01/08/2014
- Certified Date: (empty)
- End Circulation: 10/05/2014
- Election Date: 11/05/2014
- Req'd Signatures: 10000
- Max Lines: 25

The 'Status' dropdown menu is set to 'Not Qualified' and is circled in red. Other dropdowns include 'Group' (empty) and 'District' (MANHATTAN CITYWIDE - CW-MAN).

Below the petition details are two sections:

- Circulator(s)**: A table with one entry: MURRAY, ZACHARY ROBERT. Buttons: New, Detail, Delete.
- Candidate**: Fields for Position and Name. Buttons: New, Detail, Delete.

The **Signature Statistics** table is shown below:

Signature	Size	Accepted	Rejected	Remaining
1 - 1	27	1	26	0

Buttons below the table: Delete, Preprocess Sheets, Process Signatures.

The **Process Signatures** section includes a 'Submittal #' field and a 'Process' button.


At the bottom, there is a 'Refresh' button on the left and 'Save' and 'Close' buttons on the right.

Processing Signatures

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.

 **MONTANA VOTER REGISTRATION APPLICATION**
Fields marked with an asterisk (*) are required. If you do not provide all of the required information, your application to register to vote will not be complete. UNDER FEDERAL AND/OR STATE LAW ALL ELECTORS MUST PRESENT ID WHEN VOTING. Please type or print clearly using black ink. COMPLETE FORM AND SUBMIT TO COUNTY ELECTION OFFICE.

ELIGIBILITY REQUIREMENTS AND IDENTIFYING INFORMATION
NOTE: VOTER REGISTRATION REQUIRES U.S. CITIZENSHIP

1 Check all that apply: ☐ New Registration ☐ Name Change ☐ Address Change ☐ Signature Update ☐ Other

2 Are you a citizen of the United States? ☐ Yes ☐ No
Will you be at least 18 years of age on or before the next election? ☐ Yes ☐ No
Will you be a Montana resident for at least 30 days before the next election? ☐ Yes ☐ No
*If you checked "No" in response to any of these questions, do not complete this form.

3 Last Name* First Name* Middle Name (Optional) Suffix (jr., sr., etc.)

4 Date of Birth* Contact Phone Number (Optional) Email Address (Optional)
month / day / year

5 Select one of the following and provide the required information*
☐ I have a Montana Driver's License or Montana ID and that number is _____
☐ I do not have a Montana Driver's License or MT ID card. The last 4 digits of my SSN are _____
☐ I do not have a Montana Driver's License or MT ID card, or a Social Security Number. I have attached a copy of a photo ID that shows my name, or acceptable ID that shows my name and current address (paycheck stub; utility bill; bank statement; or government document).
ID numbers provided above are kept confidential and are not available for public inspection.

6 Montana Residence Address* City* County* Zip Code*

7 Mailing Address (required if differs from residence address) City State Zip Code

8 If applicable, check one of the following:
☐ Military Domestic (or military spouse or dependent) – only if on active duty and will be absent from place of registration
☐ Military Overseas (or overseas military spouse or dependent) ☐ U.S. Citizen Overseas

PREVIOUS REGISTRATION INFORMATION – will be used to provide cancellation information to former jurisdiction
REQUIRED IF NAME CHANGED OR IF PREVIOUSLY REGISTERED TO VOTE IN ANOTHER MT COUNTY OR IN ANOTHER STATE

9 Previous City, County and State Residence Address of Previous Registration Previous Registration Name

RECEIVE YOUR BALLOT IN THE MAIL
☐ Yes, I request an absentee ballot to be mailed to me for ALL elections in which I am eligible to vote as long as I reside at the address listed on this application. I understand that if I file a change of address with the U.S. postal service, I must complete, sign, and return a confirmation notice mailed to me by the county election office.
If your mailing address differs during certain times of the year please add the seasonal mailing address information in this space, or contact your county election office. Seasonal mailing address for the period of _____ through _____
Seasonal Mailing Address: _____

APPLICANT AFFIRMATION
I affirm under penalty of perjury that the information on this application is true, that I am a citizen of the United States, that I will be at least 18 years old on or before the next election, that I will have been a resident of Montana for at least 30 days prior to the next election, and that I am not serving a felony conviction in a penal institution nor have been found to be of unsound mind by a court. I understand that if I have given false information on this application, I may be subject to a fine or imprisonment, or both, under federal and/or state law.

Signature* Date*

THE AFFIRMATION ON THIS APPLICATION FOR VOTER REGISTRATION MUST BE SIGNED BY THE APPLICANT – FAILURE TO DO SO WILL PREVENT APPLICATION FROM BEING PROCESSED.

For county use only
Date Senate House Precinct / Split Ward School 100817

Petition Reports



CHRISTI JACOBSEN
MONTANA SECRETARY OF STATE

At any time there are several reports that you can run from various locations within the Petitions Module.

See Appendix B for these reports.

The screenshot shows the 'Petitions' module interface. A red circle highlights the 'Reports' menu, which contains the following options:

- Circulators
- Petition Processing Statistics
- Petition Signers
- Petition Signature Statistics

The main form displays the following fields and sections:

- Petition Description:**
 - Filing Officer: Ravalli
 - Petition #: TEST
 - Type: Other
 - Scope: County
 - Status: Inactive
 - Title: TEST
 - Summary: TEST
 - Date Filed: 07/17/2002
 - Certified Date:
 - Election Date:
 - Start Circulation: 07/17/2002
 - End Circulation:
 - Req'd Signatures:
 - Max Lines:
- Circulator(s):**
 - Name:
 - Buttons: New, Detail, Delete
- Candidate:**
 - Position:
 - Name:
 - Buttons: New, Detail, Delete
- Signature Statistics:**

County	Signature	Size	Accepted	Rejected	Remaining

Buttons: Delete, Preprocess Sheets, Process Signatures
- Footer:** Refresh, Save, Close

Petition 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 Signature Query

Process Options Reports

Query executed successfully. Showing 2 results. [Voter Search](#) [Help](#)

Petition #: I-184 Title: Initiative No. 184 Petition Status: Active

Submittal: 1 Signature 1 Signature Size: 15 Accepted: 2 Rejected: 3 Remaining: 10

Search

From Page 1 To 1 Status: Rejected Reason: Not Registered

Date Processed 1/1/2012 Page # 1 Line # 1 Voter ID 1 Clear Search

Signature	Page	Line	Name	Address	Voter ID	Sign Status	Sign Reason
1	1	2	Test Voter 2			Rejected	Not Regist...
1	1	3	Test Voter 3 Not Registered...			Rejected	Not Regist...

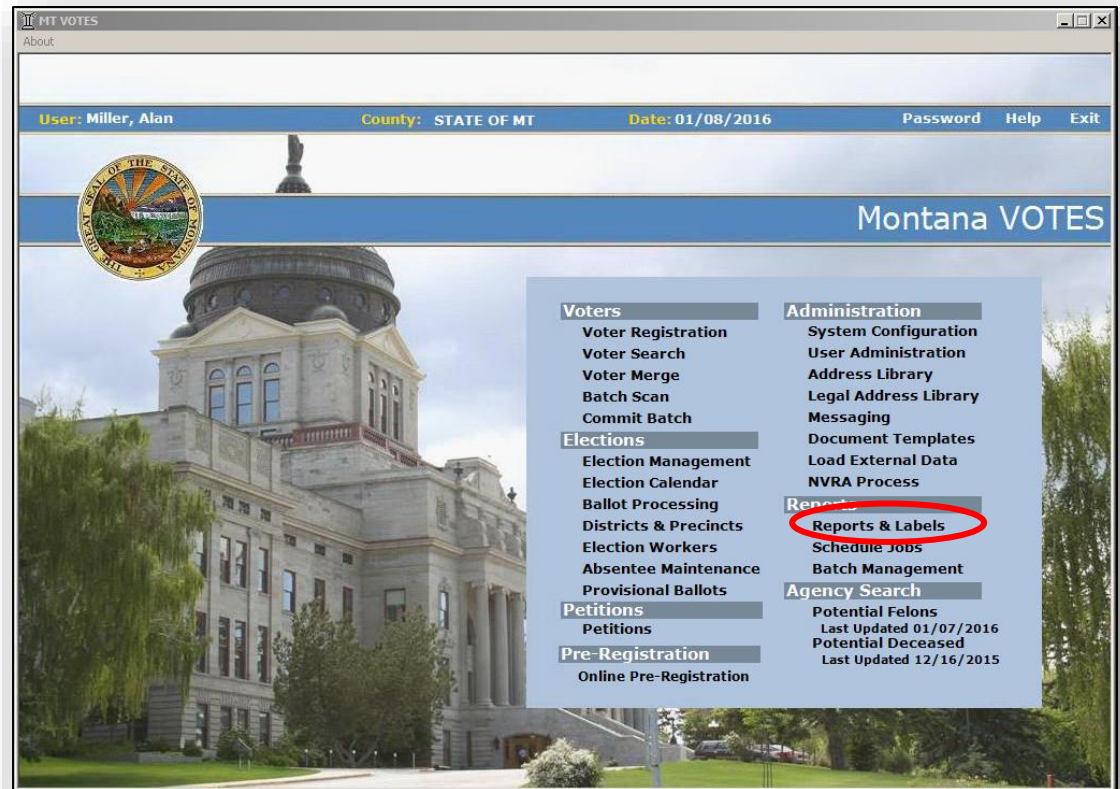
Process All Results Process Single Result Next Unprocessed Process By Page Jurisdiction Gallatin Close

Completed Additional Line View Voter Record

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**

The screenshot shows the 'Reports' module interface. On the left is a navigation menu with links: Voter Registration, Election Management, Districts & Precincts, **Petitions** (highlighted with a red '1st' arrow), Election Workers, Address Library, Labels, Ballot Processing, Master Lookups, and Close. The main area contains several filters: County (Beaverhead), Petition Type (Initiative / Referendum, highlighted with a red '3rd' arrow), Petition Name (Initiative Referendum No. 124, highlighted with a red '4th' arrow), Petition Signatures (All), Status (All), and Date Range (From/To). Below these is a table of report codes and names. PM-009, 'Petition Certification - Statistics by House District', is highlighted with a red '2nd' arrow. To the right of the table is a 'Sort Order' section with options: PETITION, DISTRICT, and SUBMITTAL-CODE. At the bottom right are buttons for Folder, Browse, Export, Cancel, and Run Report (highlighted with a red '6th' arrow). A 'Petition Submittals' section with an 'All Submittals' checkbox is also visible, with a red '5th' arrow pointing to it.

CODE	NAME
PM-003	Petition Processing Statistics
PM-004	Petitions
PM-005	Petition Signers
PM-006	Petition Signature Statistics
PM-007	Petition Summary Results Verification
PM-008	Petition Signature Page Line Statistics
PM-009	Petition Certification - Statistics by House District
PM-010	Duplicate/Triplicate Signature For Petition
PM-011	Petition Signers / Changed Counties
PM-012	Unfinished Submittals

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.

County: State of Montana UserName : Miller, Alan	Petition Certification - Statistics by House District	Date : 01/27/2018 Report No. : PM-009
To the Honorable Secretary of State of the State of Montana:		
I, _____, Election Administrator of the County of STATE OF MT, certify that I have examined the attached _____ sheets of the petition for 123456 - METAC Petition - 01/21/2018 in the manner prescribed by law; and I believe that		
Petition Summary:		
House District No : <u>HD 078</u>	Total : <u>1</u>	Grand Total : <u>1</u>
House District No : <u>HD 078</u>		
Total : <u>1</u>		
Grand Total : <u>1</u>		
signatures are valid; and I further certify that the affidavit of the signature gatherer of the petition is attached.		
Date signed : _____	Signature _____	
		SEAL
Test Environment MT VOTES		Page : 1

Petition Reports

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.

The image shows a stack of 10 identical PM-009 Petition Certification forms. The top form is clearly visible and contains the following information:

County: State of Montana
County Name: Yellowstone
Petition Certification - Statistics by House District
Date: 01/27/2024
Page No.: 100000

To the Honorable Secretary of State of the State of Montana:
I, _____, Clerk of the County of _____, do hereby certify that I have examined the
affidavit of _____, Clerk of the County of _____, and find that the same is true and correct.

Petition Summary:
House District No.: 15-020
Total: 1
Grand Total: 1

House District No.: 15-020
Total: 1
Grand Total: 1

Signatures are valid, and I further certify that the affidavit of the signature of the petitioner is attached.

Date signed: _____
Signature: _____
SEAL
Text: Enclosure 07/07/2024 Page: 1

PM-009 Petition Certification Reports

County: Yellowstone		Petition Certification - Statistics by House District		Date: 06/24/2014	
User Name: Patton, Susan				Report No.: PM-009	

To the Honorable Secretary of State of the State of Montana:

I, Bret Rutherford, Election Administrator, of the County of YELLOWSTONE, certify that I have examined the attached sheets of the petition **I-174 - Initiative No. 174 - 05/29/2014** in the manner prescribed by law and I believe that

Petition Summary:

HouseDistrict No: <u>HD_043</u>	Total: 1
HouseDistrict No: <u>HD_046</u>	Total: 3
HouseDistrict No: <u>HD_051</u>	Total: 1
HouseDistrict No: <u>HD_054</u>	Total: 2
Grand Total: 7	

HouseDistrict No: <u>HD_043</u>	1	Signatures in Submittal	22
Total:	1		
HouseDistrict No: <u>HD_046</u>	3	Signatures in Submittal	22
Total:	3		
HouseDistrict No: <u>HD_051</u>	1	Signatures in Submittal	22
Total:	1		
HouseDistrict No: <u>HD_054</u>	2	Signatures in Submittal	22
Total:	2		
Grand Total: 7			

signatures are valid; and I further certify that the affidavit of the county clerk, or telephone number is _____

Date signed: 6-24-14

Signature: Skip Tracy

SEAL

Montana VOTES

Page: 1/3

Montana Secretary of State
2014 I-174 Ballot Box
Reviewed for statutory requirements
by CR
Tabulated 7/7 Signatures

YELLOWSTONE COUNTY
ELECTION
ADMINISTRATOR
MONTANA

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.

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.
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).

Petition Policy

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



CHRISTI JACOBSEN
MONTANA SECRETARY OF STATE



- 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.

Appendix A

Sample Signatures Sheet

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.

Reviewing Signatures

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.

County: Gallatin User Name : Miller, Alan		Circulators Report		Date : 01/29/2018 Report No. : PM-001	
Petition Scope : City Petition Types : Initiative / Referendum					
Petition #	I-182	Status	Inactive		
Title	Initiative No. 182				
Type	Initiative / Referendum	Party			
Received Date	04/15/2016	District	Montana		
Petition Scope	State				
Name	Address	City	Phone		

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.

County: Lake User Name : User, Lake	Full Petition Processing Statistics Petition Types : Initiative / Referendum	Date : 01/02/2020 Report No. : PM-003
Petition Information		
Petition Name : Initiative No. 182		
Date Filed : 04/15/2016		
Petition Expires : 07/15/2016		
Minimum Signatures Required : 24175		
Total Signatures Processed : 42467		
Processing Signature Summary		
Total Accepted Signatures :	27825	(66%) Of Those Processed
Total Rejected Signatures :	13361	(31%) Of Those Processed
Total Blank Line/ Crossed Out Signatures :	1281	(3%) Of Those Processed
Rejected Reason	Total	(% Rejected)
Other	59	(.4%)
Duplicate	1238	(9.2%)
Illegible	766	(5.7%)
DO NOT USE	858	(6.4%)
Signature No Match	771	(5.7%)
Not Registered in County/District	9669	(72.3%)

Petition Reports

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 included **Submittal #**,
Circulator, and **Processed Date**.

County: Gallatin User Name : Miller, Alan		Petition Signers Report				Date : 01/29/2018 Report No. : PM-005				
Petition Types : Initiative / Referendum Petition : I-184 - Initiative No. 184 - 10/31/2017 Petition Submittals : 1 Petition Signature : All										
<u>SUBMITTAL:1</u>										
<u>SIGNATURE:1</u>										
Sub. #	Page	Line	Voter ID	Name	Residence	Status	Verification Reason	House District	Circulator	Processed Date

Petition Reports

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

County: Gallatin User Name : Miller, Alan	Petition Signature Statistics Report	Date : 01/29/2018 Report No. : PM-006
Petition Scope : City Petition Types : Initiative / Referendum Petition Submittals : All Signature : All		
Petitions # : I-182		
Title : INITIATIVE NO. 182		
Type : INITIATIVE / REFERENDUM		
Party :		
Date Filed : 04/15/2016		
Districts : MONTANA		
<u>STATISTICS</u>		
Accepted Signatures : 3416 Rejected Signatures : 1122 Total Processed Signatures : 4538 Unprocessed Signatures : 0		
Total Sheets : 625 Total Lines : 5399 Total Submittals : 128		

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.

County: Lake User Name : User, Lake	Full Petition Processing Statistics Petition Types : Initiative / Referendum	Date : 01/02/2020 Report No. : PM-003
Petition Information		
Petition Name : Initiative No. 182		
Date Filed : 04/15/2016		
Petition Expires : 07/15/2016		
Minimum Signatures Required : 24175		
Total Signatures Processed : 42467		
Processing Signature Summary		
Total Accepted Signatures :	27825	(66%) Of Those Processed
Total Rejected Signatures :	13361	(31%) Of Those Processed
Total Blank Line/Crossed Out Signatures :	1281	(3%) Of Those Processed
Rejected Reason	Total	(% Rejected)
Other	59	(.4%)
Duplicate	1238	(9.2%)
Illegible	766	(5.7%)
DO NOT USE	858	(6.4%)
Signature No Match	771	(5.7%)
Not Registered in County/District	9669	(72.3%)

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.

Count Signature	Do Not Count Signature
Sufficiently Similar Signature	Non-Matching Signature
Inactive Registrant	Provisional Registrant
Late Registrant	Pending-Incomplete Registrant
Address or Phone # do not match VR record	No Address and No Phone #
Registered in your county	Not registered in your county

Updated January 2020