



Secretary of State  
Corey Stapleton

# Petition Processing in MT Votes

2020 Election Administrator Certification Training  
Updated June 2020

*Montana Secretary of State*  
[sosmt.gov](http://sosmt.gov) • [soselections@mt.gov](mailto: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](http://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.

Dated on this 1st day of April, 2020 by

DAFFY DUCK  
Printed Name of Signature Gatherer

Daffy Duck  
Signature

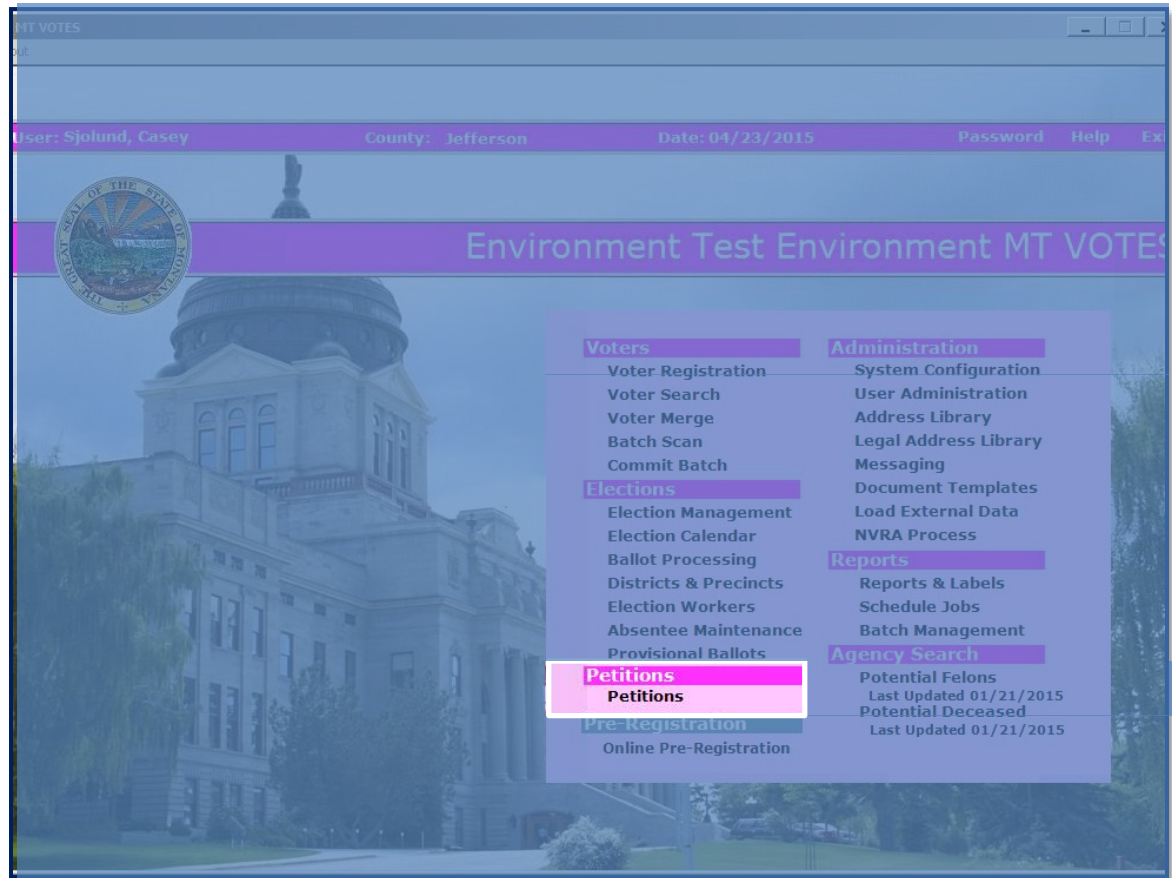
Where to file Petition and Affidavit:  
County Election Administrator's Office  
A list of county election offices may be found at: [sosmt.gov/elections](http://sosmt.gov/elections)

# Creating Petitions

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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

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Circulators are  
Signature Gatherers

Petitions Screen:

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

The screenshot shows the "Petitions" application window. At the top, there's a "Query executed successfully." message. Below it is a search form with fields for "Petition #", "Title", "District Types", and "District", along with a "Status" dropdown menu set to "Active". There are "Search" and "Clear" buttons. Below the search form is a "Search Results" table. The table has four columns: "Petition Number", "Title", "Petition Type", and "District (District Type)". The table lists various petitions, including "Initiative No. 177", "Constitutional Initiative No. 115", "Initiative No. 178", and several "Candidate" petitions for the 2016 US Presidential election. The last row, "I-179 Initiative No. 179", is highlighted with a red circle. At the bottom of the window, there are buttons for "New", "Detail", "Delete", "Preprocess Sheets", "Process Signatures", and "Close". The "Detail" button is also circled in red.

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 fields: Filing Officer (STATE OF MT), Group (empty), Petition # (I-175, circled in red), District (Montana), Type (Initiative / Referendum), Scope (State), Status (Active), Title (Initiative No. 175), and Summary (Allow any school employee, with a valid permit, to possess and carry a concealed handgun in a school). The 'Date Filed' is 08/28/2015, 'Certified Date' is empty, 'Election Date' is 11/08/2016, 'Start Circulation' is 08/28/2015, 'End Circulation' is 07/15/2016, 'Req'd Signatures' is 24175, and 'Max Lines' is empty. The 'Circulator(s)' section has a table with one entry: BILLI, CHET A. The 'New' button in this section is circled in red. The 'Signature Statistics' table has columns: Signature, Size, Accepted, Rejected, Remaining. The 'Process Signatures' section has a 'Submittal #' field and a 'Process' button. The 'Candidate' section has a 'Position' dropdown and a 'Name' field. The 'Refresh' button is at the bottom left, and 'Save' and 'Close' buttons are at the bottom right.

**Petitions**  
Petition Circulators Signatures Reports

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

**Petition Description**

Filing Officer: STATE OF MT Group:  [Group Information](#)

Petition #: I-175 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:  Election Date: 11/08/2016

Start Circulation: 08/28/2015 End Circulation: 07/15/2016 Req'd Signatures: 24175 Max Lines:

**Circulator(s)**

Name
BILLI, CHET A

**Signature Statistics**

Signature	Size	Accepted	Rejected	Remaining

**Candidate**

Position:  Name:

**Process Signatures**

Submittal #:

# 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 fields for Petition # (TestVoter), Voter ID (450131639), Last Name (VOTER), First Name (TEST), Name Suffix, Effective Date, Middle Name, and Expiration Date. The 'Link to Voter' button is circled in red. The 'Contact Information' section has tabs for Address and Contact, with a table showing Address Type, Address, and Last Updated. The 'List of Circulators' table is empty. The 'Save' and 'Close' buttons at the bottom are also circled in red.

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

Last Name	First Name	Middle Name	Voter ID	Effective Date	Expiration Date

# 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

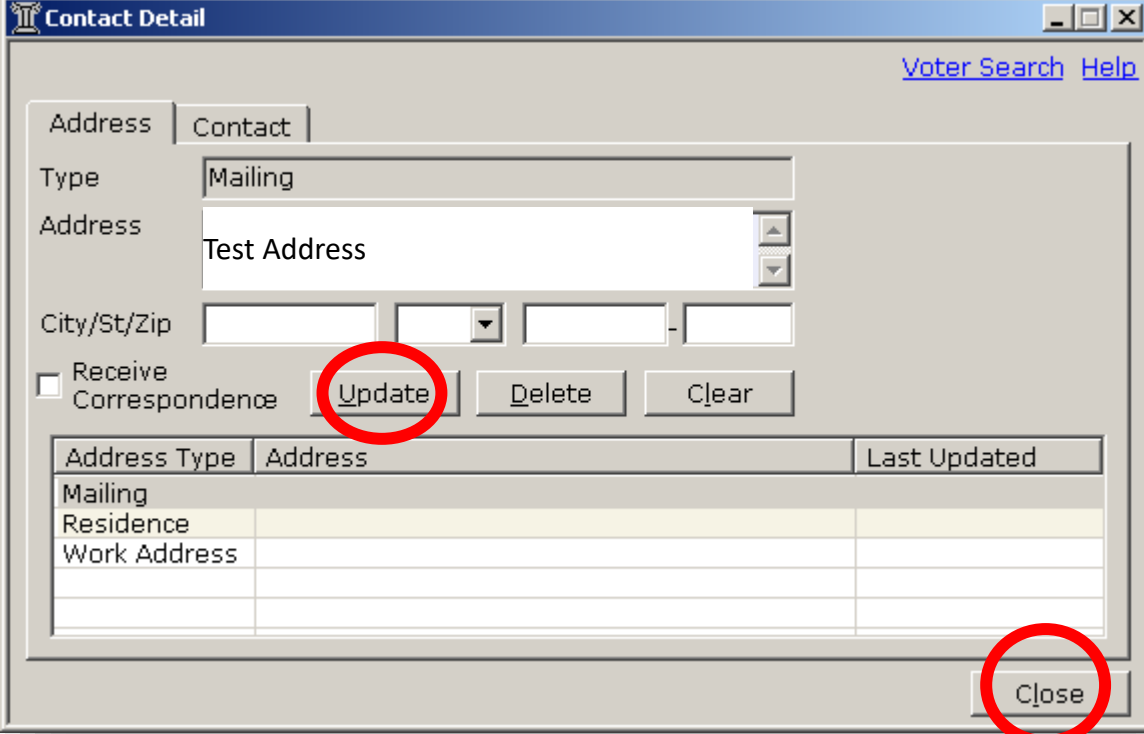
## Contact Detail

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

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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.**

The screenshot shows the 'Edit Petition' web application. The interface is divided into several sections. The 'Petition Description' section at the top contains fields for Filling Officer (Jefferson), Group, Petition # (TestVoter), District (WHITEHALL CITY - CW\_W), Type (Candidate), Scope (City), Status (Active), Title (2015 Test Voter Candidate for City Election), and Summary (Test Voter for City Election). Below this are date fields for 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), and Max Lines. The 'Circulator(s)' section has a table with one entry: VOTER, TEST. The 'Candidate' section has fields for Position and Name. The 'Signature Statistics' section has a table with columns: Signature, Size, Accepted, Rejected, and Remaining. At the bottom, there are buttons for 'Delete', 'Preprocess Sheets' (which is circled in red), and 'Process Signatures'. There are also 'Refresh', 'Save', and 'Close' buttons.

# 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>lynson</i>	7/12	517 Jay Ln Belgrade
3. <i>Shonda J. Jones</i>	3/9/12	SN 24th Ave Unit C Boz
4. <i>Andrew McFarlane</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>Gray Vinner</i>	10/12	100 THE HILL
9. <i>Mark S. Davis</i>	3/10/12	3650 MAGENTA
10. <i>Sue Smith</i>	3/17/12	BOZEMAN 59718

2010 W Mendon  
Boz MT  
Collection

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

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.)

**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** **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 # (TestVoter), Title (2015 Test Voter Candidate for City Electn...), County (Jefferson), Submittal (1), Circulator (VOTER, TEST), and Current Submittals (0). The 'Receive Bulk Sheets' section has fields for Accepted Sheet (2), Receive Sheets, Last Good Line, and a Save button. The 'Sheet Information' section includes Max Lines, Approval Date (06/10/2015), Page # (1), Last Good Line (10), and buttons for Save & Next and Save. Two tables show line status: the left table lists lines 1-10 with codes and descriptions, and the right table shows a summary of the first four lines.

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

# 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.

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

- 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). There is an 'Auto Assign' button.
- 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. It also has 'Save & Next' and 'Save' buttons.
- Tables:** Two tables are displayed side-by-side. The left table has 10 rows with columns 'Line', 'Code', and 'Description'. The right table has 4 rows with columns 'Code' and 'Description'.
- Buttons:** At the bottom right, there are 'Label', 'Complete', 'Clear', and 'Close' buttons.

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

# 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. At the top right are links for 'Voter Search' and 'Help'. The 'Petition Summary' section includes fields for 'Petition #' (TestVoter), 'Title' (2015 Test Voter Candidate for City Electn...), 'County' (Jefferson), 'Submittal' (1), 'Auto Assign', 'Current Submittals' (0), and 'Circulator' (VOTER, TEST). The 'Receive Bulk Sheets' section has 'Accepted Sheet' (2), 'Receive Sheets', 'Last Good Line', and a 'Save' button. The 'Sheet Information' section includes 'Max Lines', 'Approval Date' (06/10/2015), 'Page #' (2), 'Last Good Line' (10), 'GOTO', 'Save & Next', and 'Save' buttons. Below these are two tables: a main table with 10 lines and a smaller table on the right with 4 lines. At the bottom are 'Label', 'Complete', 'Clear', and 'Close' buttons, with 'Complete', 'Clear', and 'Close' circled in red.

**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

# Processing Signatures

Secretary of State  
Corey Stapleton



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

Search

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.

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:

Mailing

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

Save

Status: Accepted Reason: Sheet #: 1 Line #: 1

Name: 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
	Active	VOTER TEST	ST WHITEHALL MT 59759	

Review Registration Full Image Show All Select Not Registered Close

# 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	<del>Vladimir Putin</del>	1-7	<del>WvZzKwA</del>	<del>AwKkww</del>		
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' application window. At the top, a green status bar reads 'Voter record has been saved.' with links for 'Voter Search' and 'Help'. The main form area has a pink header with 'Petition #: TestVoter', 'Title: 2015 Test Voter Candidate for City Election', and 'Petition Status: Active'. Below this, a 'Submittal: 1' label is present. The 'Search' section includes fields for Last Name, First Name, Phone Number, House #, Street Name, City, and Zip. The 'Mailing' section includes Address, City/St/Zip, and Country. A 'Save' section at the bottom of the form 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'. There are buttons for 'Save & Prev', 'Save & Next', and 'Save'. The 'Save & Next' button is circled in red. Below the form, there are keyboard shortcuts: 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. At the very bottom, there are buttons for 'Review Registration', 'Full Image', 'Show All', 'Select', 'Not Registered' (circled in red), and 'Close'.

# 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 divided into several sections: 'Petition #', 'Title', and 'Petition Status' (all in green); 'Submittal: 1'; a 'Search' section with fields for Last Name, First Name, Middle Name, and Phone Number; a 'Mailing' section with fields for Address, City/St/Zip, and Country; and a 'Save' section with a 'Status' dropdown menu (set to 'Accepted'), a 'Reason' field, and 'Sheet #' and 'Line #' fields. Below these are fields for 'Name', 'Comment', and 'Processed Date' (01/29/2018). There are also checkboxes for 'Mark For Later Review' and 'Record Has Not Been Processed', and buttons for 'Save & Prev', 'Save & Next', and 'Save'. A 'Voter Validations' pop-up window is overlaid on the main form, showing a 'Validation Messages' section with the text 'The voter has already signed this petition 2 time(s)'. The pop-up has a 'Close' button at the bottom right. At the bottom of the main window, there are 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**.

<b>Petition #: I-187</b>		<b>Title: Initiative No. 187</b>		<b>Petition Status: Active</b>						
<b>Submittal: 1</b>										
<b>Search</b>										
Last Name		First Name		Middle Name						
House #		Street Name		City						
Mailing Address		City/St/Zip		Zip						
Country		<input type="checkbox"/> Secondary Statewide Search		<input type="checkbox"/> Search Soundex						
		<input type="checkbox"/> Search Statewide		Clear Search						
<b>Save</b>										
Status		Reason		Sheet # 1 Line # 3						
Name		<div>Not Registered in County/District - NR Duplicate - DUP Signature No Match - SNM Illegible - IL Blank Line - BL Crossed Out - C Withdrawn - WD Other - OTH</div>		Been Processed						
Comment				Save & Next						
				Save						
Jurisdiction Beaverhead				F7 - Select, Focus On Reason						
F7 - Sa				- 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

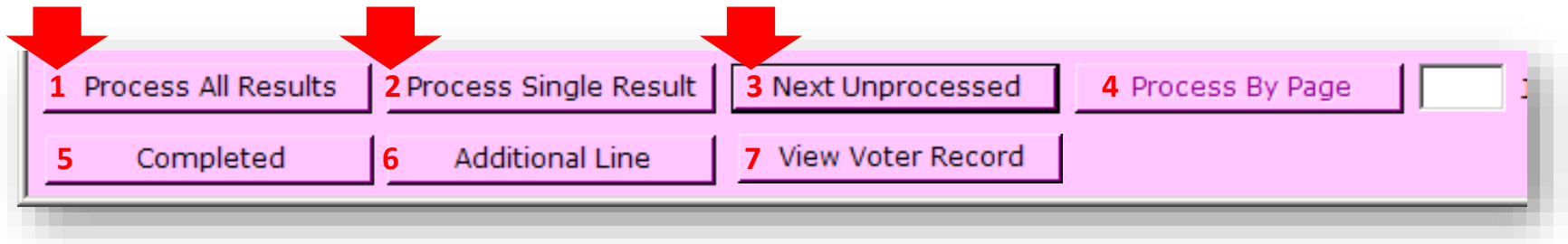
Search  
From Page  To  Status  Reason   
Date Processed  Page #  Line #  Voter ID

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...

# 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

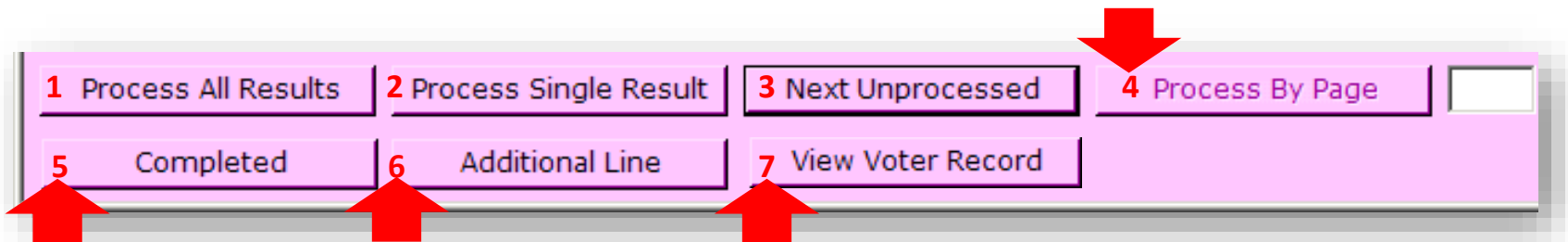
## Review of Options on Petition Signature Query Screen

**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](#)

**Candidate**

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

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

**Signature Statistics**

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

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

**Process Signatures**

Submittal #: [Process](#)

[Refresh](#) [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 card 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

Secretary of State  
Corey Stapleton



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

See Appendix B for these reports.

A screenshot of the "Petitions" module interface. The "Reports" tab is selected and highlighted with a red circle. The interface includes fields for "Filing Officer" (Ravalli), "Petition #" (TEST), "Type" (Other), "Scope" (County), "Status" (Inactive), "Title" (TEST), and "Summary" (TEST). It also has date fields for "Date Filed" (07/17/2002), "Certified Date", "Election Date", "Start Circulation" (07/17/2002), "End Circulation", "Req'd Signatures", and "Max Lines". There are sections for "Circulator(s)" and "Candidate" with "New", "Detail", and "Delete" buttons. A "Signature Statistics" table is visible at the bottom, and a "Refresh" button is at the bottom left. The "Reports" dropdown menu shows options: "Circulators", "Petition Processing Statistics", "Petition Signers", and "Petition Signature Statistics".

County	Signature	Size	Accepted	Rejected	Remaining

# 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: Page #: Line #: Voter ID: 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...

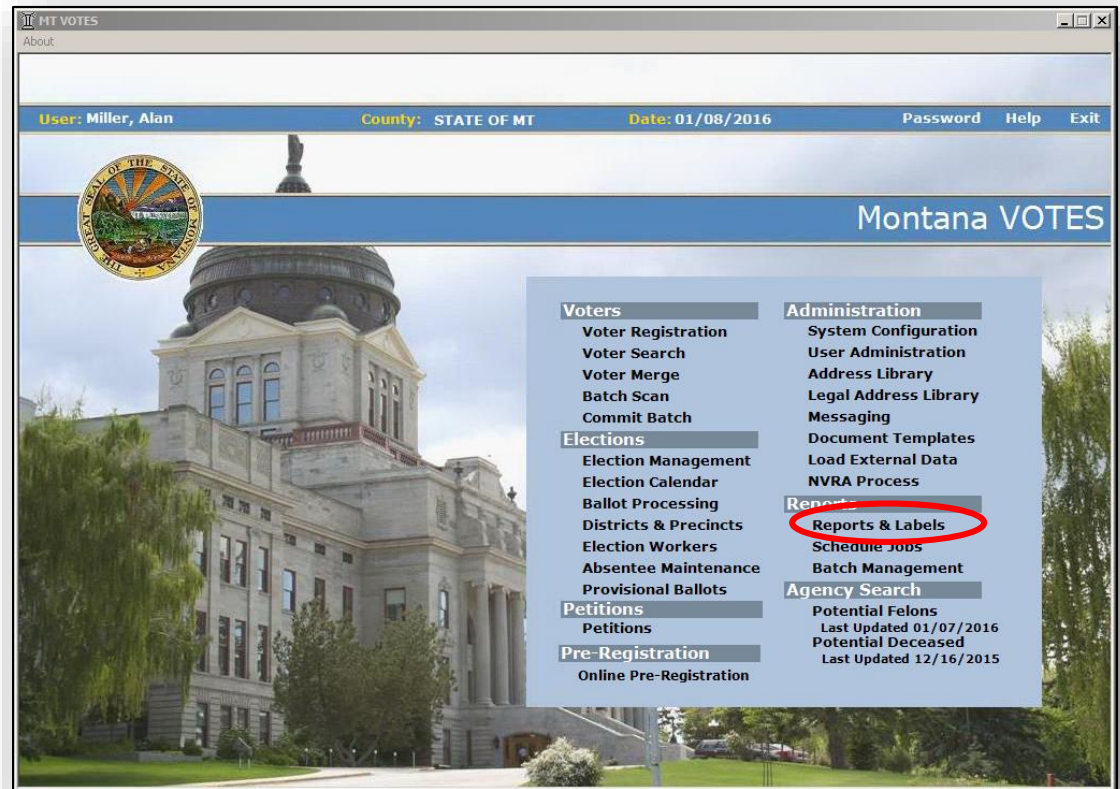
Process All Results Process Single Result Next Unprocessed Process By Page Jurisdiction: Gallatin Close

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

1<sup>st</sup> – Click **Petitions**

2<sup>nd</sup> – Select **PM-009**

3<sup>rd</sup> – Select **Petition Type**

4<sup>th</sup> – Select **Petition Name**

5<sup>th</sup> – Choose the **Petition Submittal(s)** you wish to certify

6<sup>th</sup> – 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 a checkbox for 'All Submittals' is also visible, highlighted with a red '5th' arrow.

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
<b>PM-009</b>	<b>Petition Certification - Statistics by House District</b>
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	<b>Petition Certification - Statistics by House District</b>	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:**

HouseDistrict No : <u>HD 078</u>	Total : <u>1</u>
Grand Total : 1	

---

HouseDistrict No : <u>HD 078</u>	Total : <u>1</u>
Grand Total : 1	

---

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.

[illegible]

# 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
<b>Grand Total: 7</b>	

---

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

---

signatures are valid; and I further certify that the affidavit of the petitioner, and the post office address, residence, or telephone number is correct.

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 CH  
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

Secretary of State  
Corey Stapleton



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).



# 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](mailto: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

Secretary of State  
Corey Stapleton



- 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

Secretary of State  
Corey Stapleton



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

# 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	<b>Full Petition Processing Statistics</b> Petition Types : Initiative / Referendum	Date : 01/02/2020 Report No. : PM-003
<b>Petition Information</b>		
<b>Petition Name :</b> Initiative No. 182		
<b>Date Filed :</b> 04/15/2016		
<b>Petition Expires :</b> 07/15/2016		
<b>Minimum Signatures Required :</b> 24175		
<b>Total Signatures Processed :</b> 42467		
<b>Processing Signature Summary</b>		
<b>Total Accepted Signatures :</b>	27825	(66% ) <b>Of Those Processed</b>
<b>Total Rejected Signatures :</b>	13361	(31% ) <b>Of Those Processed</b>
<b>Total Blank Line/ Crossed Out Signatures :</b>	1281	(3% ) <b>Of Those Processed</b>
<b>Rejected Reason</b>	<b>Total</b>	<b>(% Rejected)</b>
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	<b>Petition Signature Statistics Report</b>	Date : 01/29/2018 Report No. : PM-006
Petition Scope : City Petition Types : Initiative / Referendum Petition Submittals : All Signature : All		
<b>Petitions # :</b> I-182		
<b>Title :</b> INITIATIVE NO. 182		
<b>Type :</b> INITIATIVE / REFERENDUM		
<b>Party :</b>		
<b>Date Filed :</b> 04/15/2016		
<b>Districts :</b> MONTANA		
<b><u>STATISTICS</u></b>		
<b>Accepted Signatures :</b> 3416 <b>Rejected Signatures :</b> 1122 <b>Total Processed Signatures :</b> 4538 <b>Unprocessed Signatures :</b> 0		
<b>Total Sheets :</b> 625 <b>Total Lines :</b> 5399 <b>Total Submittals :</b> 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	<b>Full Petition Processing Statistics</b> Petition Types : Initiative / Referendum	Date : 01/02/2020 Report No. : PM-003
<b>Petition Information</b>		
<b>Petition Name :</b> Initiative No. 182		
<b>Date Filed :</b> 04/15/2016		
<b>Petition Expires :</b> 07/15/2016		
<b>Minimum Signatures Required :</b> 24175		
<b>Total Signatures Processed :</b> 42467		
<b>Processing Signature Summary</b>		
<b>Total Accepted Signatures :</b>	27825	(66% ) <b>Of Those Processed</b>
<b>Total Rejected Signatures :</b>	13361	(31% ) <b>Of Those Processed</b>
<b>Total Blank Line/Crossed Out Signatures :</b>	1281	(3% ) <b>Of Those Processed</b>
<b>Rejected Reason</b>	<b>Total</b>	<b>(% Rejected)</b>
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](http://sosmt.gov) • [soselections@mt.gov](mailto: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](mailto: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