
Schedule No. 3

Elections Records Schedule

**Adopted by the Local Government
Records Committee, August 1996**
LAST REVISED – Sept. 2016

Before You Shred, Think Ahead

Introduction to Public Records Management

All public records have a specific value—whether administrative, fiscal, legal, historical, transitory (short-term) and whether created internally or received from an outside source. Some of them are so vital to government operation, that they must be preserved for perpetuity or protected to ensure continuity. Every local government entity is legally required to manage its public records in an orderly and systematic way.

Disposition & Destruction of Public Records

There are two different legal procedures that must be followed before it disposes of its public records. The first relates to records under ten years old. The second process relates to documents exceeding the ten-year retention limit.

- **Records Under Ten Years:** *Montana Local Government General Schedules* dictate how long a record must be kept before destruction or transfer. Before any action is taken, the agency must complete the *Request for Records Disposal or Transfer Authorization* form and submit it to the Montana Department of Administration, Local Government Services Bureau, P.O. Box 200547, Helena, MT 59620-0547. A template disposal form is located at [Request for Records Disposal. Instructions](#) for completing the form are also available.

Once approved by the Local Government Services Bureau and the Montana Historical Society, the form will be returned to you. You may then dispose of approved items ***that are not ten years old or older***. Complete and file the form after adding destruction completion signature and date.

- **Records Over Ten Years:** If there are records older than 10 years the process changes because by [Law 2-6-1205, MCA](#) non-confidential records must be held for 60 days before they are destroyed. The 60-day notice alerts entities like Montana Historical Society-State Archives, colleges/universities, historical museums, genealogy societies, and the general public who may want to obtain those documents.

To activate the 60 day notice complete the *Request for Records Disposal or Transfer Authorization form* and submit it to the Local Government Services Bureau. The Bureau then sends it to the Montana Historical Society who will forward the Request to the Secretary of State Records & Information Management (RIM) Division. The items will be posted on the Local Government Records list-serve for the 60-day notice period.

If you are contacted during the 60-day period, it must transfer the record(s) to the requesting party in the priority order shown in MCA 2-6-1205. The requesting party is required to pay all costs associated with the transfer. If no one has requested the records

after the 60-day period, they can be destroyed or deleted and the Request should be signed off by the person conducting final removal.

The Local Government Records Committee recommends that each local government agency adopt a policy to manage multiple requests for the same record(s).

Technical Assistance

All requests for technical assistance should be emailed to SOSLocalGovtRecCom@mt.gov.

ER3

*RM60 is a records disposal request form issued by the Local Government Records Committee. "No RM60 required" means that the records do not need to be submitted to the LGRC disposal subcommittee for approval before being disposed unless the records are over 10 years old.

FOR RECORD DISPOSAL SEE MCA 2-6-403 For the most current revision go to: www.sos.state.mt.us

Rev. 4-2017 This revision supersedes all previous versions of this schedule

MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE

DEPARTMENT: ELECTIONS

ITEM	RECORD TITLE AND DESCRIPTION	RETENTION TIME	COMMENTS
1.	ABSENTEE BALLOT ENVELOPES a. Returned/Verification (signed envelopes) b. Secrecy	a. & b. 1 year	NO RM60* REQUIRED
2.	ABSENTEE BALLOT LOGS a. Voter's Absentee ballot request-county and local elections b. Voter's absentee ballot request-state and federal elections c. Election administrator's certification of absentee ballots issued d. Confirmation letter to annual absentee voter	a. 1 year if no recount is pending. b. 2 years if no recount is pending. c. 1 year for county & local elections; 2 years for state and federal elections. d. 1 year	NO RM60* REQUIRED
3.	ADDRESS CONFIRMATION CARDS- Notification cards sent to voters that failed to vote in a General election or because mail ballot was returned as undeliverable; part of NVRA process.	2 years	NO RM60* REQUIRED
4.	AFFIDAVITS OF PUBLICATION (Notices of election) a. close of registration b. polling places c. notice of election d. notice-public test of election machine e. filing deadlines f. proof of publications	County and Local Government- 1 year State and Federal- 2 years***	NO RM60* REQUIRED
5.	AUDIT LOG- CENTRAL COUNTER or PRECINCT COUNTER	1 year for county & local elections. 2 years for state & federal elections.	NO RM60* REQUIRED
6.	AUTOMARK FLASHCARD –Necessary to mark the ballots or produce audio of ballot.	6 days after the canvass of the election if no recount or court action is pending.	NO RM60* REQUIRED

ER4

*RM60 is a records disposal request form issued by the Local Government Records Committee. "No RM60 required" means that the records do not need to be submitted to the LGRC disposal subcommittee for approval before being disposed unless the records are over 10 years old.

FOR RECORD DISPOSAL SEE MCA 2-6-403 For the most current revision go to: www.sos.state.mt.us

Rev. 4-2017 This revision supersedes all previous versions of this schedule

MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE

DEPARTMENT: ELECTIONS

ITEM	RECORD TITLE AND DESCRIPTION	RETENTION TIME	COMMENTS
7.	BALLOTS –COUNTY AND LOCAL GOVERNMENT- a. Voted and un-voted and detached stubs b. Unused c. Unverified Provisional ballots d. Verified Provisional ballot secrecy envelopes and outer affirmation envelope. e. Test Ballots-Automark	a. 1 year if no recount is pending * see MCA 13-1-303 b. 6 months c. and d. 1 year e. 1 year	NO RM60* REQUIRED
8.	BALLOTS –STATE AND FEDERAL a. Voted and un-voted and detached stubs b. Unused c. Unverified Provisional ballots d. Verified Provisional ballot secrecy envelopes and outer affirmation envelope. e. Test Ballots-Automark	a. 2 years* if no recount is pending (federal law) see Federal Law*** b. 6 months c. and d. 2 years e. 2 years	NO RM60* REQUIRED
9.	CANDIDATE FILING FORMS OR PETITIONS		See Clerk and Recorders Retention Schedule for filing and retention time of candidate’s financial statements and oaths of office.
10.	CANDIDATES- REGISTER OF	4 years	NO RM60* REQUIRED
11.	CANVASS BOOKS/RESULTS	County and Local Government- 1 year State and Federal- 2 years***	NO RM60* REQUIRED
12.	CERTIFICATION OF AUTOMARK TESTING	2 years if no recount is pending	NO RM60* REQUIRED
13.	CERTIFICATION OF TABULATION EQUIPMENT TESTING	2 years if no recount is pending	NO RM60* REQUIRED

ER5

*RM60 is a records disposal request form issued by the Local Government Records Committee. “No RM60 required” means that the records do not need to be submitted to the LGRC disposal subcommittee for approval before being disposed unless the records are over 10 years old.

FOR RECORD DISPOSAL SEE MCA 2-6-403 For the most current revision go to: www.sos.state.mt.us

Rev. 4-2017 This revision supersedes all previous versions of this schedule

MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE

DEPARTMENT: ELECTIONS

ITEM	RECORD TITLE AND DESCRIPTION	RETENTION TIME	COMMENTS
14.	ELECTION SEAL LOG	2 years if no recount is pending	NO RM60* REQUIRED
15.	ELECTRONIC DEVICE or related software necessary to count ballots.	6 days after the canvass of the election if no recount or court action is pending.	NO RM60* REQUIRED
16.	INVOICES FOR ELECTION COSTS	Audit + 1 year	NO RM60* REQUIRED
17.	M 100 TAPE ROLLS- Tracks all activity on the M 100 machine.	2 years if no recount.	NO RM60* REQUIRED
18.	MAIL BALLOT ELECTIONS a. Secrecy envelopes b. Returned/Verification (signed envelope) c. Undeliverable envelopes d. Ballots e. Daily tally of mail ballots received f. Record of questioned ballots g. Transport box seal register h. Written plan-duplicate-original at Secretary of State office i. Replacement ballot register j. Record of ballot voted in person k. Place of deposit signature log l. Replacement ballot request	County and Local Government-1 year if no recount /court action is pending State- 2 years unless court action or recount is pending.	NO RM60* REQUIRED
19.	OFFICIAL RETURNS OF ELECTION	Permanent	
20.	PETITIONS- LOCAL	8 years Offer to State Archives if 65 years or older	Originals NO RM60* REQUIRED
21.	PETITIONS- STATEWIDE a. non-Presidential b. Presidential	a. 3 months after election** see MCA 13-27-305 b. 2 years***	Copies NO RM60* REQUIRED
22.	POLL AND TALLY BOOKS	4 years Offer to State Archives if 65 years or older	NO RM60* REQUIRED
23.	POST ELECTION AUDIT RECONCILIATION AND REPORT TO SECRETARY OF STATE	2 years if no recount is pending	NO RM60* REQUIRED
24.	PRECINCT MAPS	Permanent	

ER6

*RM60 is a records disposal request form issued by the Local Government Records Committee. "No RM60 required" means that the records do not need to be submitted to the LGRC disposal subcommittee for approval before being disposed unless the records are over 10 years old.

FOR RECORD DISPOSAL SEE MCA 2-6-403 For the most current revision go to: www.sos.state.mt.us

Rev. 4-2017 This revision supersedes all previous versions of this schedule

MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE

DEPARTMENT: ELECTIONS

ITEM	RECORD TITLE AND DESCRIPTION	RETENTION TIME	COMMENTS
25.	PRECINCT REGISTERS	4 years Offer to State Archives if 65 years or older	Historic value
26.	ELECTIONS – REGISTRATION a. Voter Confirmation Card – returned as undeliverable b. Cancellation Notice from other Counties or States c. Death Notice from other Counties or States d. Lists of Purged Voters – canceled voters purged from the statewide system by SOS.	a. 5 years b. 4 years c. 4 years d. 5 years	NO RM60* REQUIRED
27.	REGISTRATION CARDS	Permanent- Original and latest change of address or cancellation	Microfilm if possible
28.	RESOLUTIONS CALLING FOR ELECTION a. special district b. school c. county	Original- Permanent Duplicate copies- 1 year	

* In addition to retaining the ballots, you will need to keep any electronic device or related software necessary to read the ballots. For example, if you use a ballot that does not have the names of the candidates printed directly on the ballot, but use an electronic counting board to do the canvass, you need to save the counting board. You will need to retain anything necessary to run a recount.

** Unless a court action is pending on the sufficiency of the petition.

***FEC Regulations require everything pertaining to Federal elections must be retained for 2 years

ER7

*RM60 is a records disposal request form issued by the Local Government Records Committee. "No RM60 required" means that the records do not need to be submitted to the LGRC disposal subcommittee for approval before being disposed unless the records are over 10 years old.

FOR RECORD DISPOSAL SEE MCA 2-6-403 For the most current revision go to: www.sos.state.mt.us

Rev. 4-2017 This revision supersedes all previous versions of this schedule

MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE

DEPARTMENT: ELECTIONS

<i>Revisions to Schedule</i>				
Date	Revision	Change		
11-2003	1	<p>ITEM 5 <u>BALLOTS –COUNTY AND LOCAL GOVERNMENT</u> Added: c. Unverified Provisional ballots d. Verified Provisional ballot secrecy envelopes and outer affirmation envelope Retention time for c. and d. 1 year</p> <p>ITEM 6 <u>BALLOTS –STATE AND FEDERAL</u> Added: c. Unverified Provisional ballots d. Verified Provisional ballot secrecy envelopes and outer affirmation envelope Retention time for c. and d. 2 years</p>		
10-2006	2	<p>ITEM 1 <u>ABSENTEE BALLOT LOGS</u> Revised:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> a. Voter’s Absentee ballot request-county and local elections b. Voter’s absentee ballot request-state and federal elections c. Election administrator’s certification of absentee ballots issued d. Voter’s request to be on permanent absentee list e. Confirmation letter to permanent absentee voter </td> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> a. 1 year if no recount is pending. b. 2 years if no recount is pending. c. 1 year for county & local elections; 2 years for state and federal elections. d. Permanent e. 1 year for county & local elections; 2 years for state and federal elections. </td> </tr> </table> <p>Deleted Citation: 4 years see MCA 13-13-233</p> <p>ITEM 2 <u>ABSENTEE BALLOT ENVELOPES</u> Changed: Retention time - 1 year</p>	<ul style="list-style-type: none"> a. Voter’s Absentee ballot request-county and local elections b. Voter’s absentee ballot request-state and federal elections c. Election administrator’s certification of absentee ballots issued d. Voter’s request to be on permanent absentee list e. Confirmation letter to permanent absentee voter 	<ul style="list-style-type: none"> a. 1 year if no recount is pending. b. 2 years if no recount is pending. c. 1 year for county & local elections; 2 years for state and federal elections. d. Permanent e. 1 year for county & local elections; 2 years for state and federal elections.
<ul style="list-style-type: none"> a. Voter’s Absentee ballot request-county and local elections b. Voter’s absentee ballot request-state and federal elections c. Election administrator’s certification of absentee ballots issued d. Voter’s request to be on permanent absentee list e. Confirmation letter to permanent absentee voter 	<ul style="list-style-type: none"> a. 1 year if no recount is pending. b. 2 years if no recount is pending. c. 1 year for county & local elections; 2 years for state and federal elections. d. Permanent e. 1 year for county & local elections; 2 years for state and federal elections. 			

ER8

*RM60 is a records disposal request form issued by the Local Government Records Committee. “No RM60 required” means that the records do not need to be submitted to the LGRC disposal subcommittee for approval before being disposed unless the records are over 10 years old.

FOR RECORD DISPOSAL SEE MCA 2-6-403 For the most current revision go to: www.sos.state.mt.us

Rev. 4-2017 This revision supersedes all previous versions of this schedule

Revisions to Schedule

Date	Revision	Change
10-2006 (cont.)	2 (cont.)	<p>ITEM 3 <u>ADDRESS CONFIRMATION CARDS</u> Added: “or because mail ballot was returned as undeliverable.”</p> <p>ITEM 5 <u>AUDIT LOG</u> New (all items after this are renumbered)</p> <p>ITEM 6 <u>AUTOMARK FLASHCARD</u> New</p> <p>ITEM 7 <u>BALLOTS-COUNTY AND LOCAL GOVERNMENT</u> Deleted from: a. “Includes signed affirmation envelopes and undelivered or returned envelopes from mail ballot elections”</p> <p>ITEM 8 <u>BALLOTS-STATE AND FEDERAL</u> Deleted from a. : “Includes signed affirmation envelopes and undelivered or returned envelopes from mail ballot elections”</p> <p>ITEM 9 <u>CANDIDATE FILING SHEETS OR PETITIONS</u> Replaced: “SHEETS” with “FORMS” Deleted : Retention Time - “Terms of office” Comments added: “See Clerk and Recorders Retention Schedule for filing and retention time of candidate’s financial statements and oaths of office.”</p> <p>ITEM 15 <u>ELECTRONIC DEVICE</u> New</p> <p>ITEM 16 <u>INVOICES FOR ELECTION COSTS</u> New</p>
10-2009	3	<p>ITEM 7 <u>BALLOTS –COUNTY AND LOCAL GOVERNMENT</u> & ITEM 8 <u>BALLOTS – BALLOTS –STATE AND FEDERAL</u> Added to: a. “...and detached stubs”</p>
4-2010	4	<p><u>FACE SHEET</u> Correction: Changed adopted date from April 2005 to August 1996 & added Rev. 1.4 April 2010</p> <p>ITEM 7 <u>BALLOTS –COUNTY AND LOCAL GOVERNMENT</u> Added: e. Test Ballots-Automark; Retention: 1 year</p> <p>ITEM 8 <u>BALLOTS – BALLOTS –STATE AND FEDERAL</u> Added: e. Test Ballots-Automark; Retention: 2 years</p>

ER9

*RM60 is a records disposal request form issued by the Local Government Records Committee. “No RM60 required” means that the records do not need to be submitted to the LGRC disposal subcommittee for approval before being disposed unless the records are over 10 years old.

FOR RECORD DISPOSAL SEE MCA 2-6-403 For the most current revision go to: www.sos.state.mt.us

Rev. 4-2017 This revision supersedes all previous versions of this schedule

Revisions to Schedule

Date	Revision	Change															
4-2010 (cont.)	4 (cont.)	<p>NEW ITEMS: 12, 13, 14, 17, and 23 Note: all items starting with # 12 are renumbered.</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;">12.</td> <td>CERTIFICATION OF AUTOMARK TESTING</td> <td style="text-align: center;">2 years if no recount is pending</td> </tr> <tr> <td style="text-align: center;">13.</td> <td>CERTIFICATION OF TABULATION EQUIPMENT TESTING</td> <td style="text-align: center;">2 years if no recount is pending</td> </tr> <tr> <td style="text-align: center;">14.</td> <td>ELECTION SEAL LOG</td> <td style="text-align: center;">2 years if no recount is pending</td> </tr> <tr> <td style="text-align: center;">17.</td> <td>M 100 TAPE ROLLS- Tracks all activity on the M 100 machine.</td> <td style="text-align: center;">2 years if no recount.</td> </tr> <tr> <td style="text-align: center;">23.</td> <td>POST ELECTION AUDIT RECONCILIATION AND REPORT TO SECRETARY OF STATE</td> <td style="text-align: center;">2 years if no recount is pending</td> </tr> </table>	12.	CERTIFICATION OF AUTOMARK TESTING	2 years if no recount is pending	13.	CERTIFICATION OF TABULATION EQUIPMENT TESTING	2 years if no recount is pending	14.	ELECTION SEAL LOG	2 years if no recount is pending	17.	M 100 TAPE ROLLS- Tracks all activity on the M 100 machine.	2 years if no recount.	23.	POST ELECTION AUDIT RECONCILIATION AND REPORT TO SECRETARY OF STATE	2 years if no recount is pending
12.	CERTIFICATION OF AUTOMARK TESTING	2 years if no recount is pending															
13.	CERTIFICATION OF TABULATION EQUIPMENT TESTING	2 years if no recount is pending															
14.	ELECTION SEAL LOG	2 years if no recount is pending															
17.	M 100 TAPE ROLLS- Tracks all activity on the M 100 machine.	2 years if no recount.															
23.	POST ELECTION AUDIT RECONCILIATION AND REPORT TO SECRETARY OF STATE	2 years if no recount is pending															
5-2012	5	<p>Changed: ITEM 26 to <u>ELECTIONS – REGISTRATION</u></p> <ul style="list-style-type: none"> a. Voter Confirmation Card – returned as undeliverable (5yrs) b. Cancellation Notice from other Counties or States (4 yrs) c. Death Notice from other Counties or States (4 yrs) <p>Moved: Former ITEM 26 <u>REGISTRATION CARDS</u> to ITEM 27 Former ITEM 27 <u>RESOLUTIONS CALLING FOR ELECTION</u> to ITEM 28</p>															
5-2013	6	<p>ITEM 26 <u>ELECTIONS – REGISTRATION</u> Added: d. Lists of Purged Voters – canceled voters purged from the statewide system by SOS (5 years)</p> <p>ITEM 3 <u>ADDRESS CONFIRMATION CARDS</u> Changed: Retention period from “Permanent- Microfilm if possible” to “2 years”.</p> <p>ITEM 2 <u>ABSENTEE BALLOT LOGS</u> Deleted: d. Voter’s request to be on permanent absentee list (Permanent)</p> <p>Changed: e. Confirmation letter to permanent absentee voter to d.; the word “permanent” to “annual”; retention time from “1 year for county & local elections; 2 years for state and federal elections” to “1 year”.</p>															
4-2017	various	Added “NO RM 60 REQUIRED” to comments as appropriate.															

ER10

*RM60 is a records disposal request form issued by the Local Government Records Committee. “No RM60 required” means that the records do not need to be submitted to the LGRC disposal subcommittee for approval before being disposed unless the records are over 10 years old.

FOR RECORD DISPOSAL SEE MCA 2-6-403 For the most current revision go to: www.sos.state.mt.us

Rev. 4-2017 This revision supersedes all previous versions of this schedule