



Petition Processing in MT Votes

Office of Montana Secretary of State
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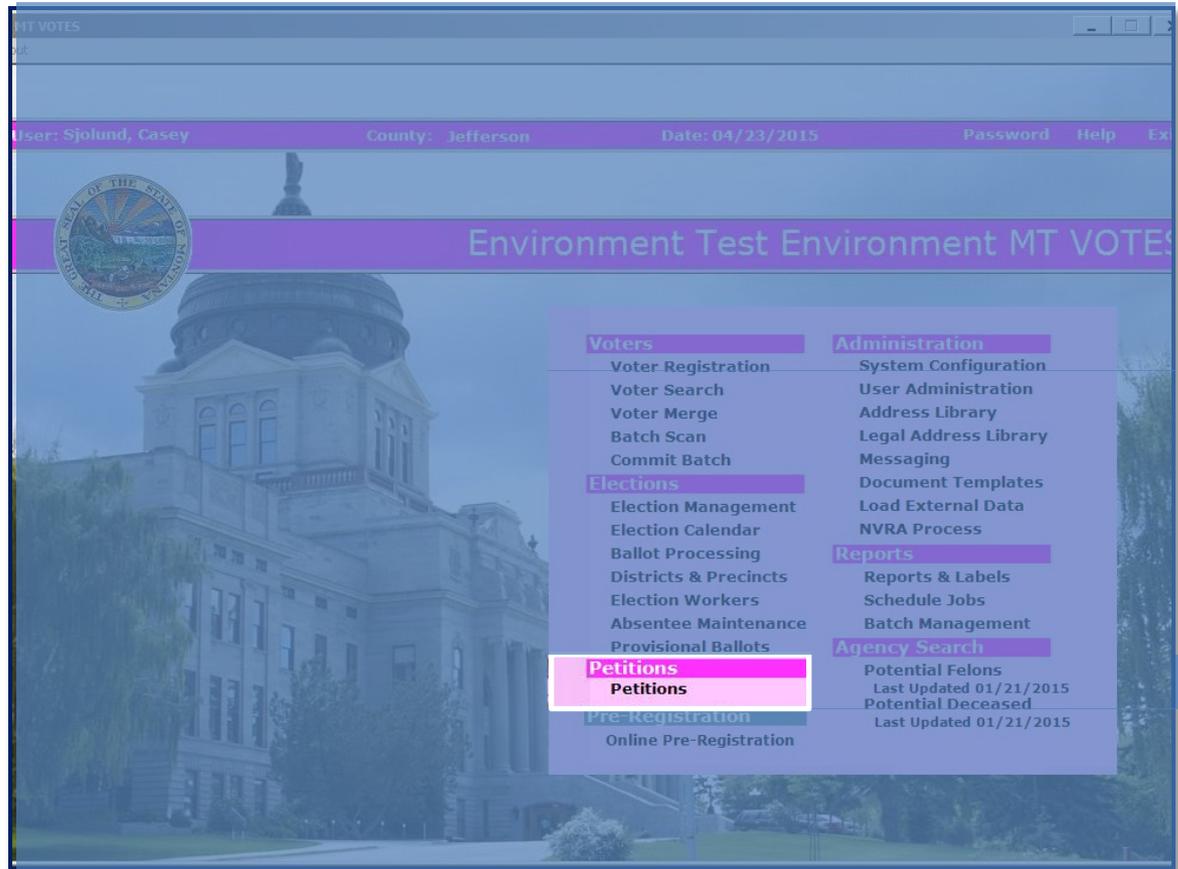
Online at <http://sos.mt.gov/Elections/Officials> under MT VOTES Training

PETITION PROCESSING

- Creating Petitions
- Circulators
- Petition Pre-Processing
- Processing Signatures
- Petition Reports
- Petition Policy

Creating Petitions

To create, petitions in MT VOTES, you can click on **Petitions** in the Petitions menu.



Creating Petitions

You will be brought to the Petitions area. (Only Active petitions will show up by default.)

The SOS will create **statewide, state district, and legislative** petitions. (If a petition does not appear on this list for such a petition, notify the SOS elections office.) County election officials need to create **local** petitions by clicking on **“New.”**

The screenshot shows a web application window titled "Petitions". At the top, there are navigation links for "Petitions", "Search", and "Reports". A green message states "Query executed successfully." with links for "Voter Search" and "Help".

The "Search" section contains the following fields:

- Petition #:
- Status:
- Title:
- District Types:
- District:

Buttons for "Search" and "Clear" are located at the bottom right of the search section.

The "Search Results" section displays a table with the following data:

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)

At the bottom of the window, there are buttons for "New", "Detail", "Delete", "Preprocess Sheets", "Process Signatures", and "Close". The "New" button is circled in red.

Creating Petitions

Here is an example of a local petition. Fill in all petition description information, leaving the “Max Lines” field blank as shown, and 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

Candidate

Position: []
Name: []
New Detail Delete

Signature Statistics

County	Signature	Size	Accepted	Rejected	Remaining

Delete Preprocess Sheets Process Signatures

Process Signatures

Submittal #: [] Process

Refresh Save Close

Circulators

Back in the Petitions area, to begin the process of adding circulators, click on the petition row for the petition in question to choose that petition, and then click the **Detail** button.

The screenshot shows the 'Petitions' application window. At the top, there is a menu bar with 'Petition', 'Search', and 'Reports'. Below the menu bar, a green message states 'Query executed successfully.' with links for 'Voter Search' and 'Help'. The search area contains several input fields: 'Petition #' (empty), 'Status' (set to 'Active'), 'Title' (empty), 'District Types' (empty), and 'District' (empty). There are 'Search' and 'Clear' buttons. Below the search area is a 'Search Results' section with a table. The table has four columns: 'Petition Number', 'Title', 'Petition Type', and 'District (District Type)'. The row for 'I-179' is highlighted in blue. At the bottom of the window, there are several buttons: 'New', 'Detail' (circled in blue), 'Delete', 'Preprocess Sheets', 'Process Signatures', and 'Close'.

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

To begin pre-processing signatures, the first thing you will want to do is to ensure that you are in the right petition, and that your circulator is in the **Circulator(s)** area. If they are not in the **Circulator(s)** area you will need to add them.

To add circulators, click the **New** button in the **Circulator(s)** box.

The screenshot shows the 'Petitions' application window. The 'Petition Description' section includes fields for Filing Officer (STATE OF MT), Petition # (I-175), Type (Initiative / Referendum), 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 'Circulator(s)' section is highlighted with a blue circle and contains a table with one entry: BILLI, CHET A. Below this table is a 'New' button, also highlighted with a blue circle, along with 'Detail' and 'Delete' buttons. The 'Signature Statistics' table is empty. The 'Candidate' and 'Process Signatures' sections are also visible.

Signature	Size	Accepted	Rejected	Remaining

Circulators

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

It should automatically fill or bring up a list of individuals with that name (if not, see next slide).

Click **Save** and then **Close**.

The screenshot shows the 'Circulators' application window. The window title is 'Circulators' and it has standard window controls (minimize, maximize, close) in the top right corner. There are two links in the top right: 'Voter Search' and 'Help'. The form is divided into two main sections: 'General Information' and 'Contact Information'. The 'General Information' section contains several input fields: 'Petition #' (TestVoter), 'Voter ID' (450131639), 'Last Name' (VOTER), 'First Name' (TEST), 'Name Suffix' (empty), 'Effective Date' (empty), and 'Expiration Date' (empty). There are two buttons: 'Link to Voter' (circled in blue) and 'Remove Link'. The 'Contact Information' section has a tabbed interface with 'Address' and 'Contact' tabs. The 'Address' tab is active, showing a table with columns 'Address Type', 'Address', and 'Last Updated'. The table has four rows: 'Mailing', 'Resent Addr...', 'Residence' (with address '20 N MAIN ST, WHITEHALL, MT 59759' and date '06/10/2015'), and 'Work Address'. A 'Detail' button is at the bottom right of this section. Below the 'Contact Information' section is a 'List of Circulators' table with columns: 'Last Name', 'First Name', 'Middle Name', 'Voter ID', 'Effective Date', and 'Expiration Date'. The table is currently empty. At the bottom of the window are several buttons: 'New', 'Save' (circled in blue), 'Delete', 'Preprocess Sheets', and 'Close' (circled in blue).

Address Type	Address	Last Updated
Mailing		
Resent Addr...		
Residence	20 N MAIN ST, 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 the county chosen (circulators are never required to be registered voters, and for *candidate* petitions, are not required to be Montana residents), a search dialogue box will display.

The screenshot shows a software window titled "Petitions" with a search interface. At the top, a green message states "No matching results found. (0 Results)". The search form includes tabs for "General", "Residential Address", and "Mailing Address". Under "General", there are input fields for "Last Name", "First Name", and "Middle Name", along with a "Soundex" checkbox. Below these are fields for "Voter ID", "Birth Date From", and "Birth Date To". The "Scope" section has radio buttons for "State" and "County", with "County" selected and "Gallatin" chosen in the dropdown menu. "Search" and "Clear" buttons are present. The "Search Results" section contains an empty table with columns: "Voter ID", "Name", "Residential Address", "Status", and "Date of Birth". At the bottom, there are "View Summary", "Select", and "Close" buttons.

Voter ID	Name	Residential Address	Status	Date of Birth

Circulators

If you've verified that the circulator is not registered to vote, manually input the circulator's information by clicking on the **Detail** button in the **Contact Information** section.

The screenshot shows the 'Circulators' application window. The 'Contact Information' section is highlighted with a pink border and contains a 'Detail' button circled in red. Below it is a 'List of Circulators' table with columns for Last Name, First Name, Middle Name, Voter ID, Effective Date, and Expiration Date. The table lists several circulators, including Lewis, Smith, Miller, Sauers, Phelps, Braun, Bryant, and Smith. At the bottom of the window are buttons for 'New', 'Save', 'Delete', 'Preprocess Sheets', and 'Close'.

General Information

Petition # I-174 Voter ID NOT LINKED TO A VOT

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	Y			

Circulators

The **Contact Detail** screen will display and the circulator's address and contact info can be manually entered. Click the **Update** button to store their information and then click **Close**.

Address | Contact

Type: Mailing

Address: Test Address

City/St/Zip: [] - []

Receive Correspondence

Update Delete Clear

Address Type	Address	Last Updated
Mailing		
Residence		
Work Address		

Close

Petition Pre-Processing

You are now ready to start **Pre-Processing** sheets.

You should look at the petition process like an assembly line. There is basic work before you move to the next step in the process.

Preprocessing Sheets is the first step in the process.

Click **Preprocess Sheets**.

Edit Petition

Petition Circulators Signatures Reports

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

Petition Description

Filling 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](#)

Candidate

Position: []

Name: []

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

Signature Statistics

Signature	Size	Accepted	Rejected	Remaining

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

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

Petition Pre-Processing

Click **Auto Assign** to give these sheets a Submittal number. (A **Submittal** consists of a petition sheet or set of sheets submitted together by a single Circulator with a single affidavit attached.)

Select a **Circulator**.

For this example we will pretend we received 2 sheets with 10 **Last Good Lines**. So in the **Receive Bulk Sheets** section, enter “2” in the **Receive Sheets** field and “10” in the **Last Good Line** field. Click **Save**.

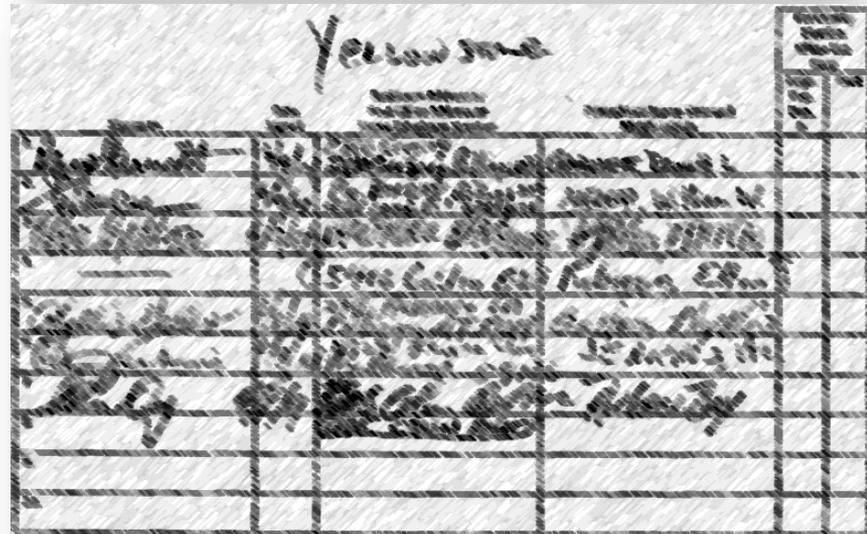
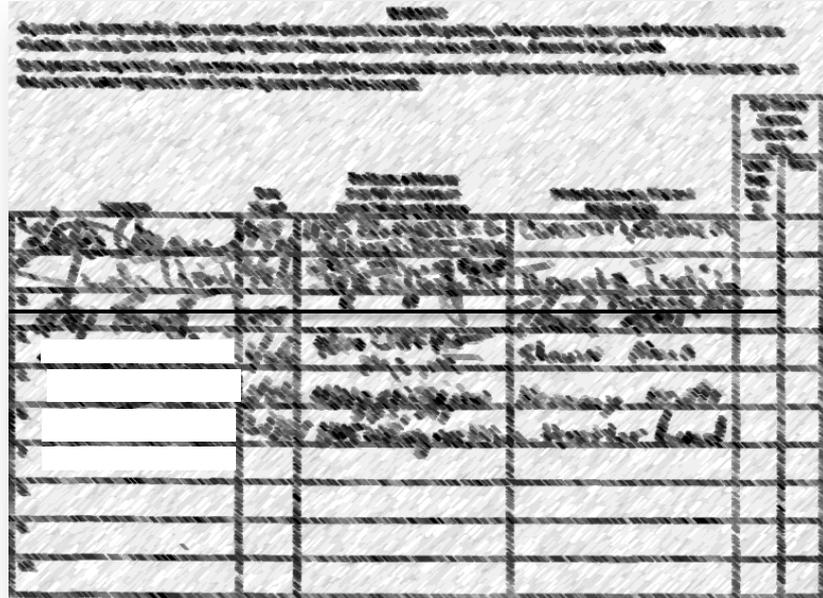
The screenshot shows the 'Preprocess Sheets' application window. The 'Petition Summary' section includes fields for 'Petition #:' (TestVoter), 'Title:' (2015 Test Voter Candidate for City Electn...), 'County:' (Jefferson), 'Submittal:' (1), 'Circulator:' (VOTER, TEST), and 'Current Submittals:' (0). The 'Auto Assign' button is circled in blue. The 'Receive Bulk Sheets' section includes 'Accepted Sheet' (0), 'Receive Sheets' (2), 'Last Good Line' (10), and a 'Save' button, all of which are circled in blue. The 'Sheet Information' section includes 'Max Lines', 'Approval Date' (06/10/2015), 'Page #', 'Last Good Line', 'GOTO', and a 'Save' button. A table with 4 columns (Code, Description) and 4 rows (1 Good, 2 Crossed out, 3 Blank, 4 No signature) is visible. The bottom of the window has buttons for 'Label', 'Complete', 'Clear', and 'Close'.

Petition Pre-Processing

To the right is a petition sheet formatted with 10 signature lines.

You will need to look through all pages in 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 information in it, even if certain signature lines are later rejected).

For example, if in the Submittal there are **2 sheets**, one in which the last ‘good’ line is **6**, and the second in which the last good line is **7**, then the last good line would be **7**, not 10.



Petition Pre-Processing

In the **Sheet Information** section enter Page # “1” then tab to the **Last Good Line** section to bring up the sheet in the display box.

In the Line-Code-Description area, you will click on the Code column and manually 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 and the next slide.)

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 #: 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 Pre-Processing

As you can see, Lines 1-2 have been given a status of **Good** (signature), Line 3 was **Crossed out**, Lines 4-7 had **No Signature**, and 8-10 were **Blank**.

To save this submittal, click **Save**. **ONLY CLICK SAVE ONCE per page.** Clicking save more than once per page will continue to add pages to the submittal. (WARNING: If you add more pages than needed, you may need to delete your submittal and start over.)

The screenshot shows the 'Preprocess Sheets' application window. The title bar reads 'Preprocess Sheets' and includes standard window controls. In the top right corner, there are links for 'Voter Search' and 'Help'. The main interface is divided into several sections:

- Petition Summary:** Displays '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 input fields for 'Accepted Sheet' (value: 2), 'Receive Sheets', and 'Last Good Line', with a 'Save' button.
- Sheet Information:** Includes 'Max Lines', 'Approval Date' (06/10/2015), 'Page #' (1), 'Last Good Line' (10), and a 'GOTO' field. A 'Save' button is circled in blue.
- Table:** A table with two columns: 'Line' and 'Code' on the left, and 'Code' and 'Description' on the right. The data rows are as follows:

Line	Code	Description	Code	Description
1	1	Good	1	Good
2	1	Good	2	Crossed out
3	2	Crossed out	3	Blank
4	4	No signature	4	No signature
5	4	No signature		
6	4	No signature		
7	4	No signature		
8	3	Blank		
9	3	Blank		
10	3	Blank		
- Bottom Buttons:** 'Label', 'Complete', 'Clear', and 'Close'.

Petition Pre-Processing

To Print Labels for your submittals, Click the **Label** button at the bottom of the Preprocess Sheets page, and put the label on the applicable affidavit. (If you choose not to print labels, just manually number the affidavit with the applicable submittal number.)

This will allow you to use your handheld barcode scanner later, during **Petition Processing**, to scan the submittal number instead of keying it into the field.

NOTICE: At the top of the print screen page you can see that this is page 7/7. You want to go to the end page to print the last label. If you don't, you will get a label for the previous submittal numbers that have already been processed. Remember, you are not required to print labels, but if you use them you should affix them to the signature gatherer's affidavit.

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

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

1 2 3

I-174
Submittal #: 9

Petition Pre-Processing

If you choose to print and affix the label, you will need to put it on the affidavit, ideally in one of the locations in the example to the right.

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.

_____ on which the first signature **attached** was gathered
(Do not write on this line)

NOTARY OR AUTHORIZED OFFICER – DO NOT FILL OUT

State of Montana _____
County of _____
Signed and sworn to before me this _____ day of _____, 20____

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

[SEAL/STAMP]

My commission expires: _____, 20____

Updated February 21, 2014

I-174 Submittal #: 9 (with barcode)

I-174 Submittal #: 9 (with barcode)

I-174 Submittal #: 9 (with barcode)

These are examples of acceptable places where you could affix the label. Try not to place the label in a way that it obscures any of the writing on the Affidavit.

Petition Pre-Processing

Repeat the process for Page #2 and any additional pages, and **CLICK Save on your last page, even if there is only one page.**

Once you are done with the last page of a submittal and have clicked **Save**, click **Complete, Clear** and **Close**.

Make sure it is done in this order. (WARNING: If you hit Save too many times, you may need to delete your submittal and start over.)

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

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

Processing Signatures

You should now see the submittal in the **Signature Statistics** section at the bottom of the **Edit Petition** page.

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

So now click the **Process Signatures** button.

Edit Petition

Petition Circulators Signatures Reports

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

Petition Description

Filling 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

Candidate

Position: []

Name: []

New Detail Delete

Signature Statistics

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

Delete Preprocess Sheets **Process Signatures**

Process Signatures

Submittal #: [] [Process](#)

Refresh Save Close

Processing Signatures

You can now start processing signatures.

Type in the **Last** and/or **First** Name and select **Search**. A list of potential matching voters will be displayed at the bottom of the screen.

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 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	20 N MAIN ST WHITEHALL MT 59759	

Review Registration Full Image Show All Select Not Registered Close

Processing Signatures

Click on the appropriate voter record from the 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 information on the existing voter in the system.

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 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	20 N MAIN ST WHITEHALL MT 59759	

Review Registration Full Image Show All Select Not Registered Close

Processing Signatures

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

If you **Reject** the signature, you must select a **Reason** for rejection. Also, if you reject a signature because the voter is not registered, type in 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.

We'll accept the signature of our Test Voter.

Choose the status of Accepted, and click the **Save & Next** button in the middle of the page, which will bring 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

Save

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

Name: Processed Date: 06/11/2015 Record Has Not Been Processed Mark For Later Review

Comment:

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	20 N MAIN ST WHITEHALL MT 59759	

Processing Signatures

You are now ready to enter your next 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. Enter their name in the Save box area and click **Not Registered** at the bottom of the screen.

Then click **Save and Next**.

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

Save

Status Reason Sheet # Line #

Name Processed Date 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
------------	--------	------	---------	-----------------

Processing Signatures

Now on your next line, try to add the same voter that you added from Sheet 1. You should receive a red bubble warning that they have already signed the petition.

Reject this signature as a duplicate.

Click **Save & Next**.

The screenshot shows the 'Signature Processing' application window. At the top, there is a menu bar with 'Signature', 'Options', and 'Reports'. Below the menu bar, a red error message reads 'Invalid entry. Please review errors.' with links for 'Voter Search' and 'Help'. The main form area is pink and contains the following information:

- Petition #: TestVoter Title: 2015 Test Voter Candidate for City Election Petition Status: Active
- Submittal: 1
- Search fields: Last Name (voter), First Name (test), Phone Number, House #, Street Name, City, Zip, Address, City/St/Zip, Country.
- Buttons: Clear, Search, Secondary Statewide Search, Search Soundex, Search Statewide.
- Status: Rejected Reason: Duplicate - DUP Page # 2 Line # 1
- Name: [Redacted] Processed Date: 06/11/2015 Record Has Not Been Processed Edit
- Comment: [Redacted] 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	20 N MAIN ST WHITEHALL MT 59759	

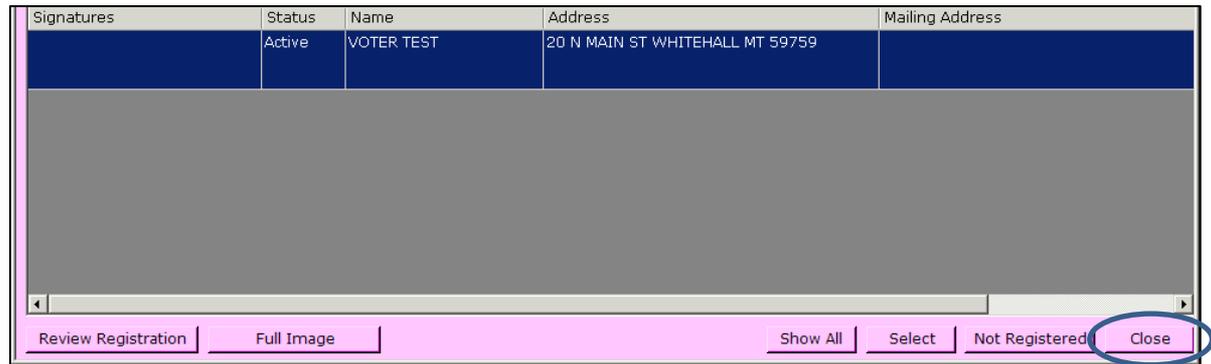
At the bottom of the window, there are buttons for 'Review Registration', 'Full Image', 'Show All', 'Select', 'Not Registered', and 'Close'.

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.”

Click **Close**.



The screenshot shows a web application interface with a table of signatures and a navigation bar. The table has five columns: Signatures, Status, Name, Address, and Mailing Address. The first row of data shows 'Active' status, 'VOTER TEST' name, and '20 N MAIN ST WHITEHALL MT 59759' address. The Mailing Address column is empty. Below the table is a navigation bar with buttons for 'Review Registration', 'Full Image', 'Show All', 'Select', 'Not Registered', and 'Close'. The 'Close' button is circled in red.

Signatures	Status	Name	Address	Mailing Address
	Active	VOTER TEST	20 N MAIN ST 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 of a **Submittal** have been processed, click the **Completed** button and then the **Close** button which will bring you back to the Petitions screen. The Petitions screen will now include a summary of the submittal.

The screenshot shows a web application window titled "Petition Signature Query". At the top, it says "Query executed successfully. Showing 12 results." Below this, there is a summary section with the following information:

- 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

Below the summary is a search section with fields for "From Page", "To", "Status", "Reason", "Date Processed", "Page #", "Line #", and "Voter ID". There are "Clear" and "Search" buttons.

The main part of the screen is a table with the following columns: Signature, Page, Line, Name, Address, Voter ID, Sign Status, and Sign Reason. The table contains 12 rows of data:

Signature	Page	Line	Name	Address	Voter ID	Sign Status	Sign Reason
1	1	1	VOTER, TEST	20 N MAIN ST WHITEHALL MT 59759	450131...	Accepted	
1	1	2	Name not registered			Rejected	Not Regist...
1	2	1	VOTER, TEST	20 N MAIN ST WHITEHALL MT 59759	450131...	Rejected	Duplicate
1	2	2	Joe Schmoe			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...

At the bottom of the window, there are several buttons: "Process All Results", "Process Single Result", "Next Unprocessed", "Process By Page", "Jurisdiction" (set to Jefferson), "Completed", "Additional Line", and "Close". The "Completed" and "Close" buttons are circled in red.

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:

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

Candidate

Position:

Name:

Signature Statistics

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

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
did not qualify. (For
**statewide, state district,
and legislative** petitions, the
Secretary of State's office
will change the status.)

The screenshot shows the 'Edit Petition' interface with the following details:

- Message:** The record has been updated successfully.
- Petition Description:**
 - Filling Officer: Gallatin
 - Group: [Empty]
 - Petition #: 1234
 - District: MANHATTAN CITYWIDE - CW-MAN
 - Type: Initiative / Referendum
 - Scope: City
 - Status: Not Qualified (circled in blue)
 - Title: Example Petition 1234
 - Summary: This is an example of a petition.
 - Date Filed: 01/08/2014
 - Certified Date: [Empty]
 - 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: MURRAY, ZACHARY ROBERT
 - Buttons: New, Detail, Delete
- Candidate:**
 - Position: [Empty]
 - Name: [Empty]
 - Buttons: New, Detail, Delete
- Signature Statistics:**

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

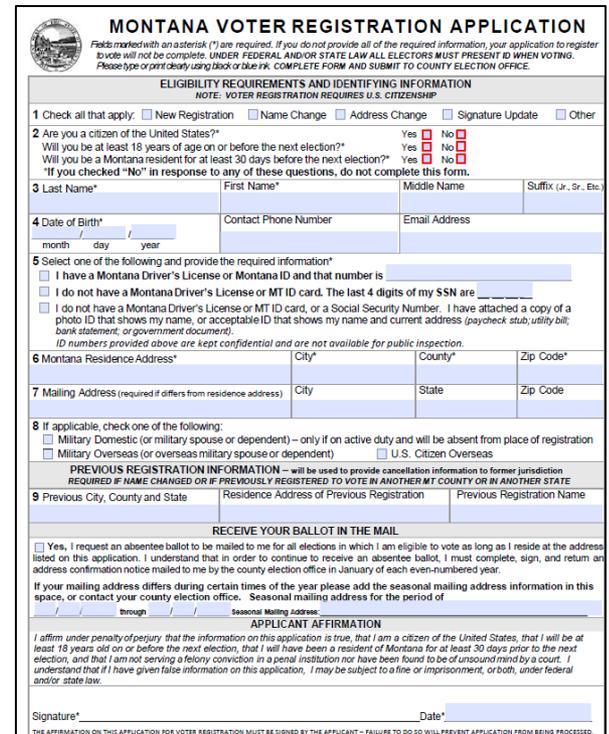
Buttons: Delete, Preprocess Sheets, Process Signatures
- Process Signatures:**
 - Submittal #: [Empty]
 - Button: Process
- Footer:** Refresh, Save, Close

Processing Signatures

Petition signers may fill out a voter registration form before signing a petition. However, until the 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 voter registration processing.



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 or blue 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 Suffix (jr., Sr., Etc.)

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

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

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

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

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

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

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

RECEIVE YOUR BALLOT IN THE MAIL
 Yes, I request an absentee ballot to be mailed to me for all elections in which I am eligible to vote as long as I reside at the address listed on this application. I understand that in order to continue to receive an absentee ballot, I must complete, sign, and return an address confirmation notice mailed to me by the county election office in January of each even-numbered year.
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 _____

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.

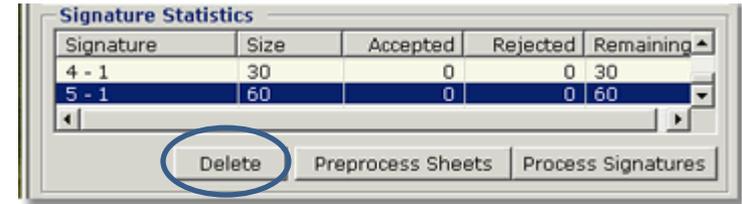
Deleting a Petition Submittal

To delete a Petition Submittal, go back to the home screen of MT VOTES and choose Petitions.

Next, choose the petition for which you wish to delete a submittal by double-clicking on it or by clicking on it once and then clicking **Detail**.

In the **Signature Statistics** section, find and click on the petition submittal in question.

Next, click on **Delete** to delete the submittal.



Signature	Size	Accepted	Rejected	Remaining
4 - 1	30	0	0	30
5 - 1	60	0	0	60

Buttons: Delete, Preprocess Sheets, Process Signatures

Petition Reports

At any time there are several reports that you can run from the Petition Signature Query screen.

Petition Signature Query

Process Options Reports

Query executed: **Circulators** 13 results. [Voter Search](#) [Help](#)

Petition #: **DIVIDE SEELEY LAKE FIRE DISTRICT** Petition Status: **Active**

Submittal: 1 Signature 1 Signature Size: 13 Accepted: 1 Rejected: 2 Remaining: 10

Search

From Page To Status Reason

Date Signed Page # Line # Voter ID

Signature	Page	Line	Name	Address	Voter ID	Sign Status	Sign Reason
1	1	2				Accepted	
1	1	4				Rejected	Not Regist...
1	1	5				Rejected	Duplicate
1	2	1					
1	2	2					
1	2	3					
1	2	4					
1	2	5					
1	3	1					
1	3	2					
1	3	3					
1	3	4					
1	3	5					

Jurisdiction

Petition Reports

The **Circulators Report** displays all circulators entered for a petition.

The screenshot shows a web browser window with the title 'Reports'. The address bar contains '1/1'. The page content is as follows:

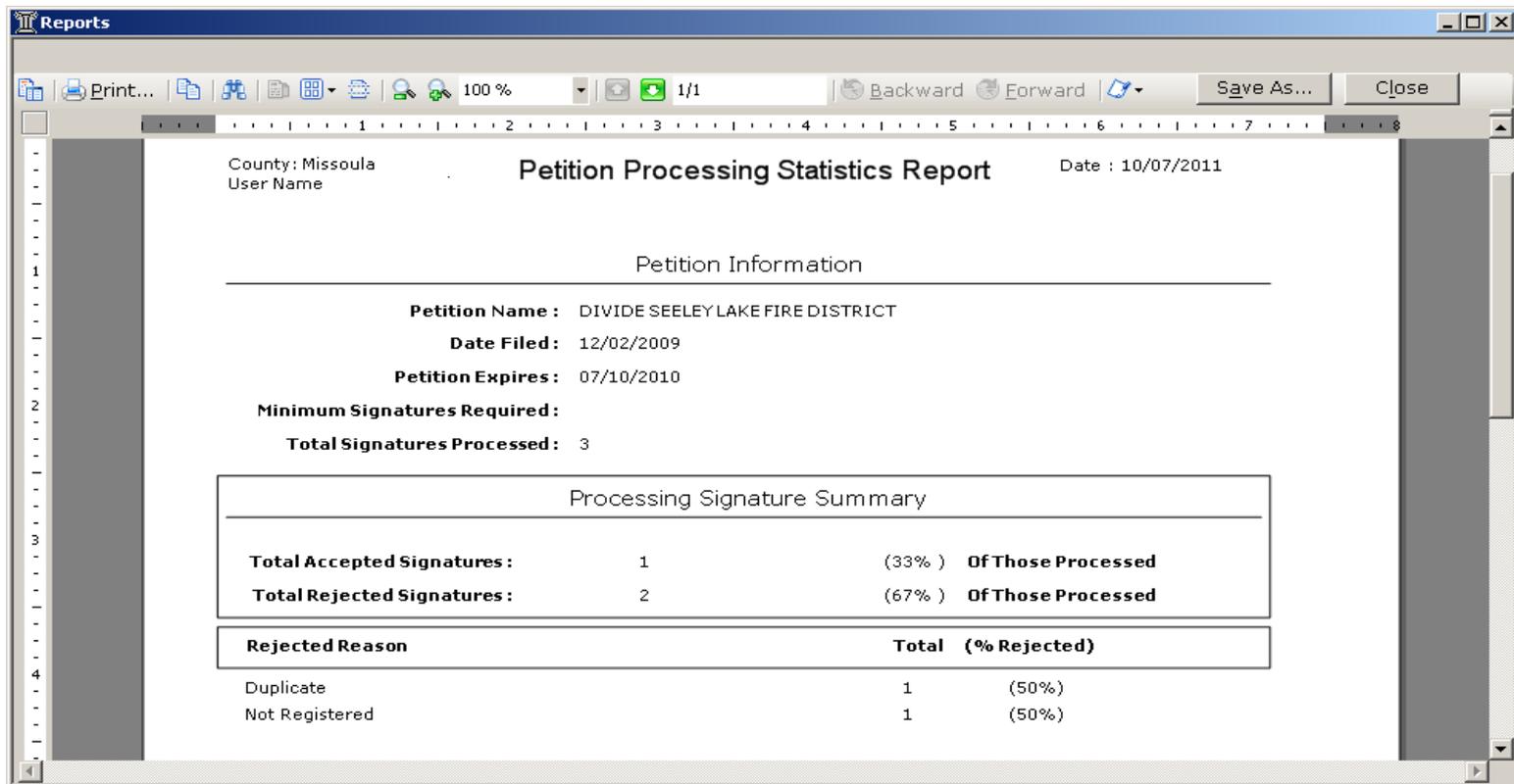
County: Missoula	Circulators Report	Date : 10/07/2011
User Name		

Petition #	03-01	Status	Active
Title	DIVIDE SEELEY LAKE FIRE DISTRICT		
Type	Initiative / Referendum	Party	
Received Date	12/02/2009	District	SEELEY LAKE FIRE
Petition Scope	City		

Name	Address	City	Phone
DOE, JOHN			
SMITH, JANET L			

Petition Reports

The **Petition Processing Statistics Report** shows the number of accepted and rejected signatures on the petition, as well as the reasons for the rejected signatures.



County: Missoula
User Name

Petition Processing Statistics Report

Date : 10/07/2011

Petition Information

Petition Name : DIVIDE SEELEYLAKE FIRE DISTRICT
Date Filed : 12/02/2009
Petition Expires : 07/10/2010
Minimum Signatures Required :
Total Signatures Processed : 3

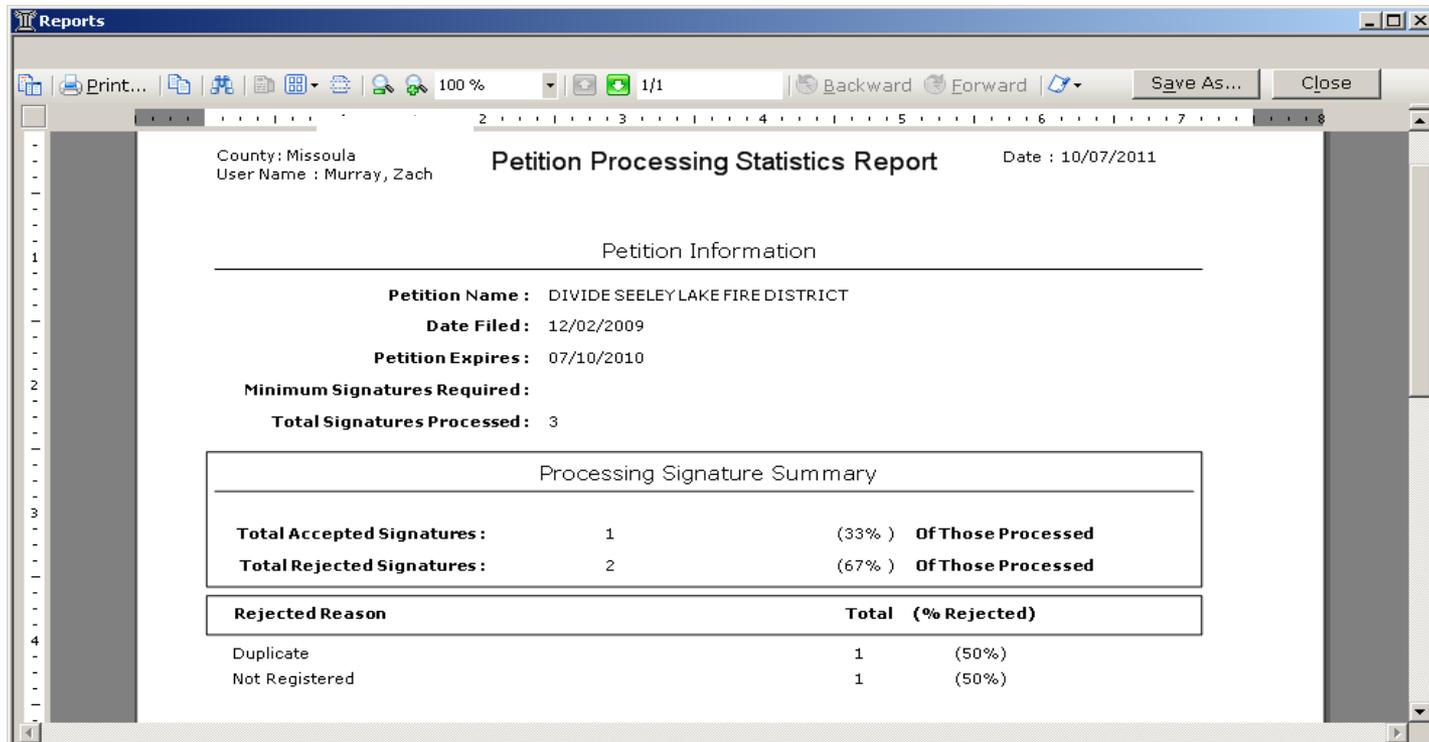
Processing Signature Summary

Total Accepted Signatures :	1	(33%)	Of Those Processed
Total Rejected Signatures :	2	(67%)	Of Those Processed

Rejected Reason	Total	(% Rejected)
Duplicate	1	(50%)
Not Registered	1	(50%)

Petition Reports

Note: Please be careful about releasing **statewide, state district, or legislative** petition totals. Petition sponsors or opponents may think the totals are just for your county. When possible, refer people to the Secretary of State for these petition totals, but not for local petition totals or local petition questions.



County: Missoula
User Name : Murray, Zach

Petition Processing Statistics Report Date : 10/07/2011

Petition Information

Petition Name : DIVIDE SEELEY LAKE FIRE DISTRICT
Date Filed : 12/02/2009
Petition Expires : 07/10/2010
Minimum Signatures Required :
Total Signatures Processed : 3

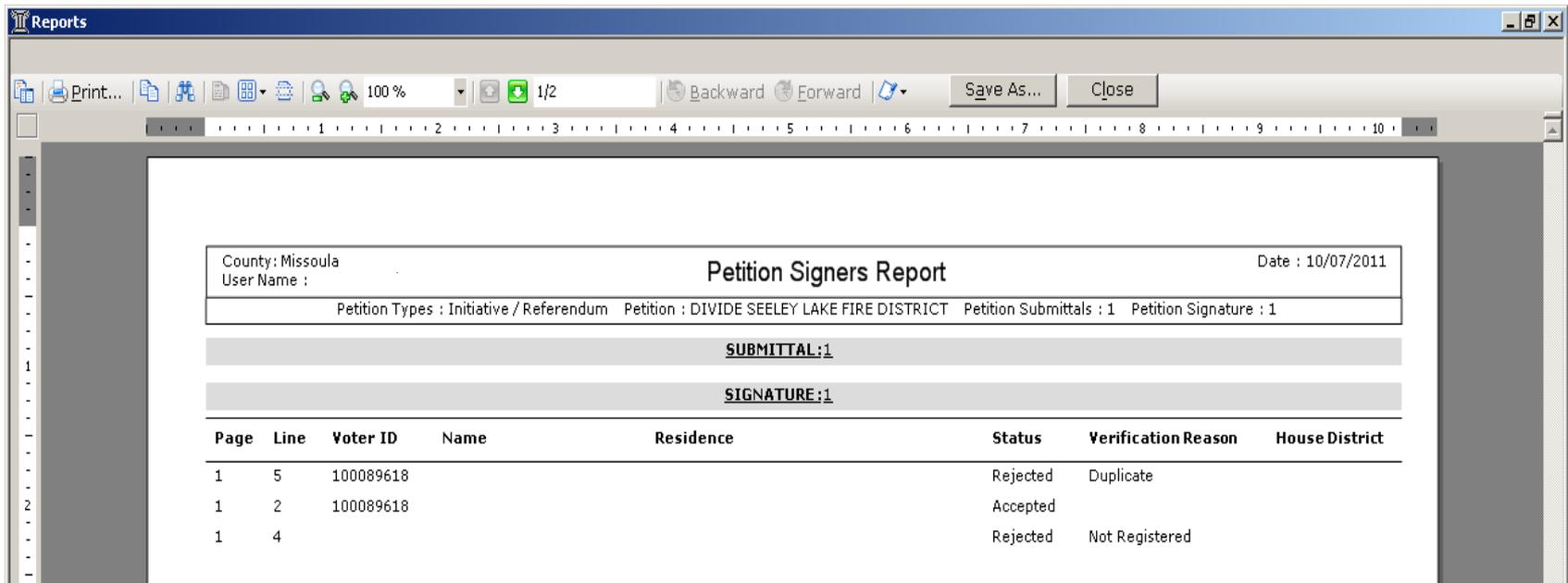
Processing Signature Summary

Rejected Reason	Total	(% Rejected)
Duplicate	1	(50%)
Not Registered	1	(50%)

Total Accepted Signatures : 1 (33%) **Of Those Processed**
Total Rejected Signatures : 2 (67%) **Of Those Processed**

Petition Reports

The Petition Signers Report shows the names of all signers on the petition.



County: Missoula
User Name :
Date : 10/07/2011

Petition Signers Report

Petition Types : Initiative / Referendum Petition : DIVIDE SEELEY LAKE FIRE DISTRICT Petition Submittals : 1 Petition Signature : 1

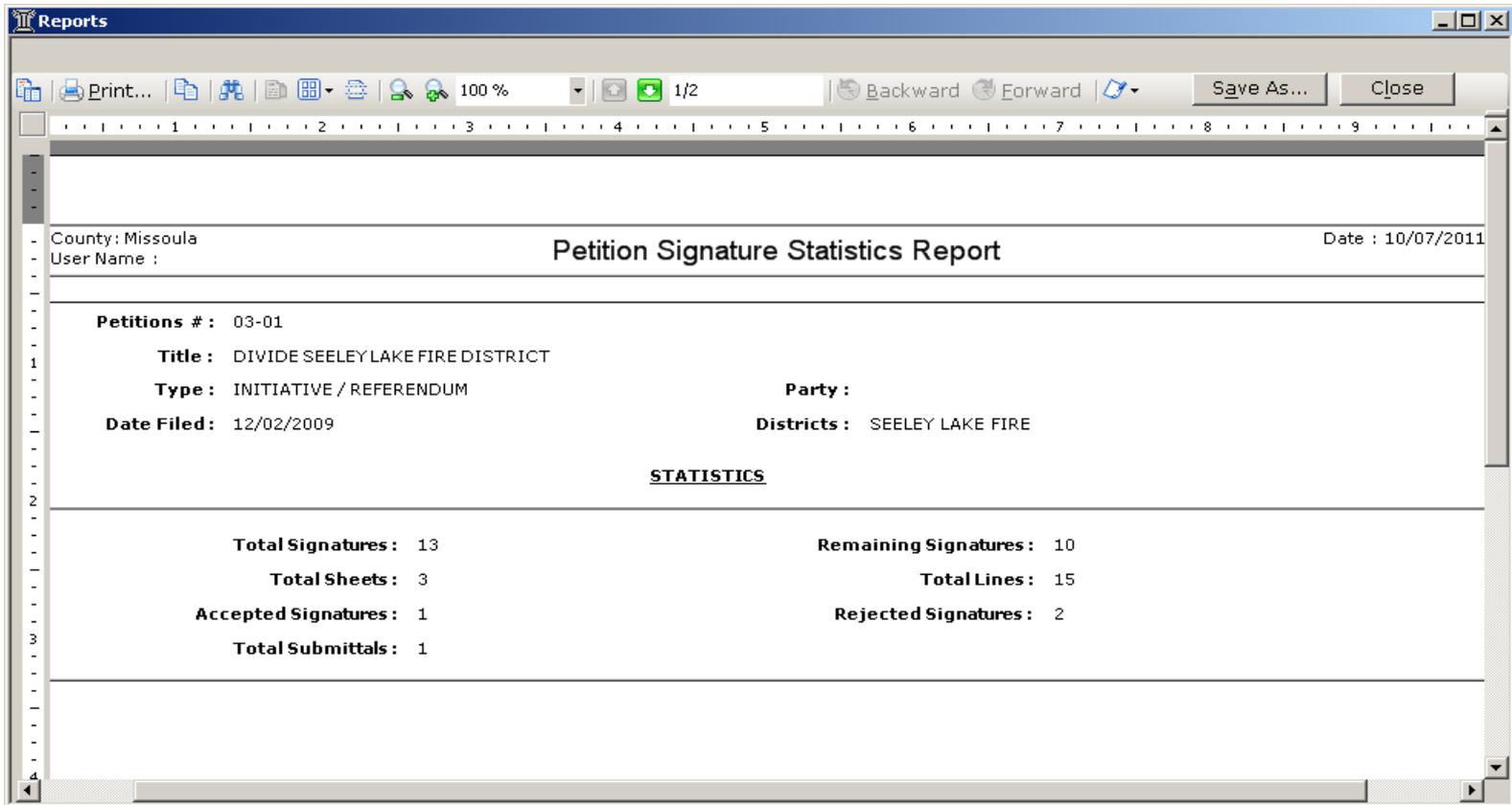
SUBMITTAL:1

SIGNATURE:1

Page	Line	Voter ID	Name	Residence	Status	Verification Reason	House District
1	5	100089618			Rejected	Duplicate	
1	2	100089618			Accepted		
1	4				Rejected	Not Registered	

Petition Reports

The Petition Signature Statistics Report will display statistics for the petition submittals and signatures.



County: Missoula
User Name :

Petition Signature Statistics Report

Date : 10/07/2011

Petitions # : 03-01
Title : DIVIDE SEELEY LAKE FIRE DISTRICT
Type : INITIATIVE / REFERENDUM
Date Filed : 12/02/2009

Party :
Districts : SEELEY LAKE FIRE

STATISTICS

Total Signatures : 13	Remaining Signatures : 10
Total Sheets : 3	Total Lines : 15
Accepted Signatures : 1	Rejected Signatures : 2
Total Submittals : 1	

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.

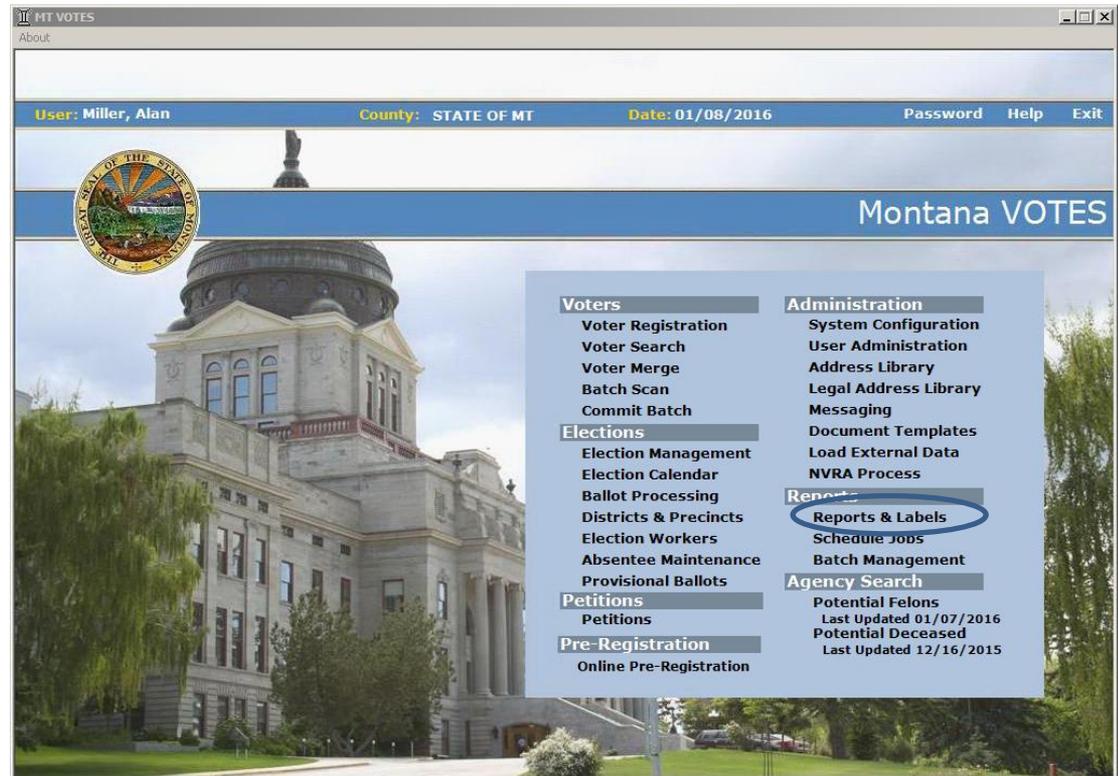
The screenshot shows the 'Petition Signature Query' application window. At the top, it displays the petition details: Petition # 03-01, Title: DIVIDE SEELEY LAKE FIRE DISTRICT, and Petition Status: Active. Below this, search filters are set: Submittal: 1, Signature: 1, Signature Size: 13, Accepted: 1, Rejected: 2, and Remaining: 10. A search section includes fields for From Page, To, Status, Reason, Date Signed, Page #, Line #, and Voter ID, with Clear and Search buttons. The main area is a table with columns: Signature, Page, Line, Name, Address, Voter ID, Sign Status, and Sign Reason. The table contains 13 rows of data, with the first three rows having non-empty Sign Status and Sign Reason values. At the bottom, there are buttons for Process All Results, Process Single Result, Next Unprocessed, Process By Page, and a Jurisdiction dropdown menu set to Missoula, along with a Close button and a status bar with Completed and Additional Line buttons.

Signature	Page	Line	Name	Address	Voter ID	Sign Status	Sign Reason
1	1	2				Accepted	
1	1	4				Rejected	Not Regist...
1	1	5				Rejected	Duplicate
1	2	1					
1	2	2					
1	2	3					
1	2	4					
1	2	5					
1	3	1					
1	3	2					
1	3	3					
1	3	4					
1	3	5					

Petition Reports

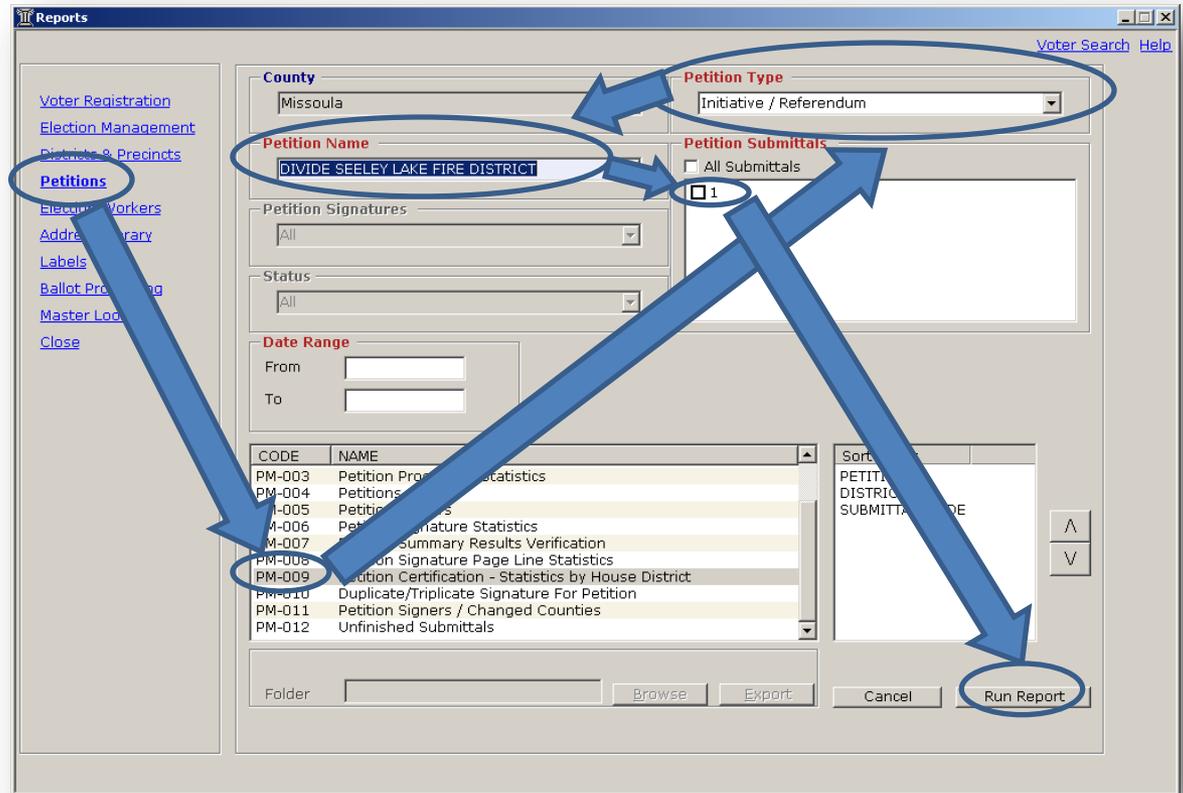
Several petition reports are available through the **Reports and Labels** module.

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



Petition Reports

Once in the Reports module, choose **Petitions**, then if processing a statewide petition, select **PM-009**, then the **Petition Type**, then the **Petition Name**, then the **Petition Submittal**, then **Run Report**.



Petition Policy

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

Candidate deadlines are at <http://sos.mt.gov/Elections/documents/Candidate-Calendar.pdf>.

2. Before you send original statewide, state district, or legislative petitions, you must make **copies** of these petitions to keep in your office.

Petition Policy

3. State law requires that for **statewide ballot issues**, signature gatherers must be MT residents, and cannot be paid per signature.

These requirements only apply to statewide ballot issues, **not local petitions or any candidate petitions**. Signature gatherers do not need to be registered voters, and **you are not responsible for policing these requirements**.

4. A notarized **Affidavit 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 they will have to have 2 affidavits attached. (1 affidavit for 25 pages and the second affidavit for the 10 remaining pages).

Petition Policy

5. If you are not sure of the answer to a **statewide petition question**, contact the Secretary of State's office elections division at soselections@mt.gov or at (406) 444-5346. The address for mailing statewide petitions is: **Montana Secretary of State, Elections and Government Services, PO Box 202801, Helena, MT 59620-2801.**

6. 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 of the answer have them contact the Secretary of State's office.

Thank you for reviewing this MT Votes Petitions Processing Guide.

As always, please contact your MT Votes Help Desk with any further questions or concerns.



1-866-541-6767

soshelpdesk@mt.gov

