Topics Covered

• Accessing the Petition Module
• Searching for Petitions
• Creating new Petitions
• Petition Details
• Petition Circulators
• Processing Sheets
• Processing Signatures
• Closing Petitions
Click on the Petitions link to access the Petition Module
Currently active petitions will automatically display under the search results.
Other Search criteria can be entered and a search ran to bring up other search's
Petition details can be viewed by selecting a listed petition and clicking the detail button.
Previously entered petition details will display.
You can also create a new petition by clicking the new button.
A blank petition details screen will display.
Fill in all petition description information and click Save to store the new Petition.
The petition will be stored and you can begin to enter Circulators. Click the New button to add them.
A blank circulator’s screen will display. Enter a circulator’s name and click Link to Voter if they are a registered MT Voter.
If they are not a registered voter, or not registered in your county, a search dialogue box will display.
If you can find an existing voter record the voter’s information will populate on the circulator screen.
If you’ve verified no voter record exists, manually input the circulator’s information by hitting the detail button.
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.
When all circulator information has been linked or manually entered click save and then close.
Back on the petition detail screen the new circulator will be listed under circulators.
Once all circulators have been entered you can move on to the Preprocess Sheets process. Click the Preprocess Sheets button to begin.
The Preprocess Sheets screen will display
First enter Petition Summary Information, which includes the submittal # and circulator.
Under Receive Bulk Sheets, enter the total number of received sheets in the submittal. Example: If you received 3 pages of signatures and 1 affidavit, that would equal 3 sheets.
Enter Last Good line. This is the maximum number of signed lines you have on any one sheet in the submittal. Click Save. Example: If pg 1 has 10 lines, pg 2 has 8 lines, & pg 3 has 9 lines, you would enter 10.
Under Sheet information enter page # 1 then tab to the last good Line field to bring up the sheet in the display box.
In the code field for each line change the number as needed to update the line description. Refer to the key on the left for the code to use.

<table>
<thead>
<tr>
<th>Line</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
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<td>2</td>
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<tr>
<td>1</td>
<td>1</td>
<td>Good</td>
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<td>1</td>
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<td>Good</td>
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<td>4</td>
<td>No signature</td>
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<tr>
<td>8</td>
<td>1</td>
<td>Good</td>
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<td>10</td>
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<td>9</td>
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<td>8</td>
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<td>Good</td>
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<tr>
<td>8</td>
<td>1</td>
<td>Good</td>
</tr>
</tbody>
</table>

Montana Secretary of State Linda McCulloch
2014 Election Official Certification Training
Once all lines have been updated as needed click save. This will change the page number to the next page to update. Update lines as needed and click save to move through all of the pages.
Be careful not to hit Save to many times, as doing so will add more pages to your submittal. Be sure to stop if the Page number is greater than the number of accepted sheets. Do not hit save again!
When all sheets have been set up, click the Complete button, then the Clear Button, and finally Close.
The Submittal will now show under the list of Signature Statistics.
To process signatures select a submittal and then click the process signatures button.
The Petition Signature Query screen will display.
Click the Next Unprocessed button to begin processing signatures
The Signature Processing screen will display. Input the first signer’s information at the top and click search.
A list of potential matching voters will be displayed at the bottom of the screen.
Click on the appropriate voter record from the list and click the Select button so it is the only record showing in the list. You cannot proceed until there is only one entry in the list.
Verify if the signature and information is correct and matches what you have by clicking the Review Registration and Full Image buttons as needed to see the corresponding information.
When ready enter in a status of accepted or rejected and a status reason if needed.
When rejecting a signature because there is no corresponding voter record in the system, it is a good idea to put the voter’s name in the field below the status reason. This is so it will be displayed on the summary who it is that is being rejected.
Petition signers may fill out a voter registration form before signing a petition. However, until the voter registration application is processed by the election office the individual is not a registered elector.

The Secretary of State advises county election officials to accept the signature on a petition if the person is registered by the time you check the signature, assuming there is no other reason to reject the petition.

It is not the burden of the Secretary of State or the 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.
When done verifying the signature and entering the status, click the Save & Next button to continue to the next line.
Repeat the steps in slides 33 – 39 until all signed lines of the submittal have been processed. Once all lines have been processed an alert will show letting you know.

Click the Close button.
All processed lines will display for review, and when ready you can click the Completed button and close out of the signature processing screen.
Before the petition can close you will need to ensure all circulators are entered, you have preprocessed sheets for every submittal, and processed all signatures.
When the entirety of the petition has been completed its status will be changed by the election administrator if it is in the county only, or by the secretary of state’s office if it is statewide.
Reports

At any time there are several reports that you can run from this Query screen.
The circulator report displays all circulators entered for a petition.
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.
Note: Please be careful about releasing statewide 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 statewide petition totals.
The Petition Signers Report shows the names of all signers on the petition.
The Petition Signature Statistic Report will display statistics for the petition submittals and signatures.
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.
Reports can also be run from the Reports & Labels module.
Once in the main reports page, go to the Petitions link
The report that is most often used is the PM-009 which gives the number of verified signatures by House District. This is the report that you will complete and send in to the Secretary of State’s office when processing statewide petitions.
If processing a statewide petition, select the name under the Petition Name field, the Petition Type and Submittal desired.
The PM-009 Petition Certification will be attached to the original copy of the signed petitions, completed, and sent into the SOS by certified mail, within 4 weeks of your receipt of the signed ballot issue petitions.

Note: For statewide candidate petitions and statewide party qualification petitions, send them so that they are received by the SOS within 1 week of when you receive them, and not later than the final deadline for candidate filing.
Petition Basics to Remember

1. Before you send the original statewide petitions, you must make copies of these petitions to keep in your office.

2. The deadlines for 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 sos.mt.gov/Elections/Ballot_Issues. Some deadlines are also listed on the election calendar.

3. State law requires that for statewide ballot issues, signature gatherers must be MT residents, and cannot be paid per signature. They do not need to be registered voters, and you are not responsible for policing these requirements.

4. Counties can no longer print the abbreviated ballot language – the law was changed when the Attorney General at the time went to vote and found that the polling place did not have the complete text available as required by law. He initiated a bill in the next session to remove the abbreviated ballot option.
5. 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 brings in 35 petition sheets they will have to have 2 affidavits attached. (1 for 25 pages and the second one for the 10 remaining pages)

6. 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.

7. 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 Module Guide.

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

1-866-541-6767  ▪  soshelpdesk@mt.gov