CHRISTI JACOBSEN
MONTANA SECRETARY OF STATE

Petition Processing in MT Votes

2020 Election Administrator Certification Training
Updated March 2021

Montana Secretary of State
sosmt.gov • soselections@mt.gov

OVERVIEW

- Receiving Petitions Basics
- Creating Petitions
- Circulators
- Petition Preprocessing
- Processing Signatures
- Petition Reports
- Petition Policy
- Troubleshooting

Receiving Petitions

- **Start processing** as soon as you receive signed petitions.
- Every sheet or set of up to 25 petition sheets submitted together must have a **signature gatherer affidavit** with.
- If affidavits are submitted at the bottom of a pile of petition sheets, have the sponsor or signature gatherer sort them out.
  - You do not have to sort out which petitions belong with which signature gatherer – this is the responsibility of the sponsor and signature gatherer.
- When you receive petitions provide a receipt. Date & time stamp them. Process them in the order that you receive.
- Be sure to process as **one submittal** each petition sheet or set of sheets, up to 25 sheets submitted with **one affidavit**.
  - When you come to a new affidavit, even from the same signature gatherer, process it as a new submittal.
  - **One affidavit = one submittal** in MT Votes.

Acceptable Affidavits of Signature Gatherer

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

_____
Signature of Notary or Public Official

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

[SEAL/STAMP]

Updated July 25, 2019

Sample of a completed Unsworn Declaration affidavit.

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

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

AFFIDAVIT FILED WITH ELECTION ADMINISTRATOR

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

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

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

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

Daffy Duck
Signature of petition signature gatherer

123 Lakeview Blvd
Address of petition signature gatherer

Helena MT 59602
City, state and zip code

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

Insert the following within the text space below:
"I [Insert Name] declare under penalty of perjury that the foregoing is true and correct"

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

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

Dated on this 1st day of April, 2020 by

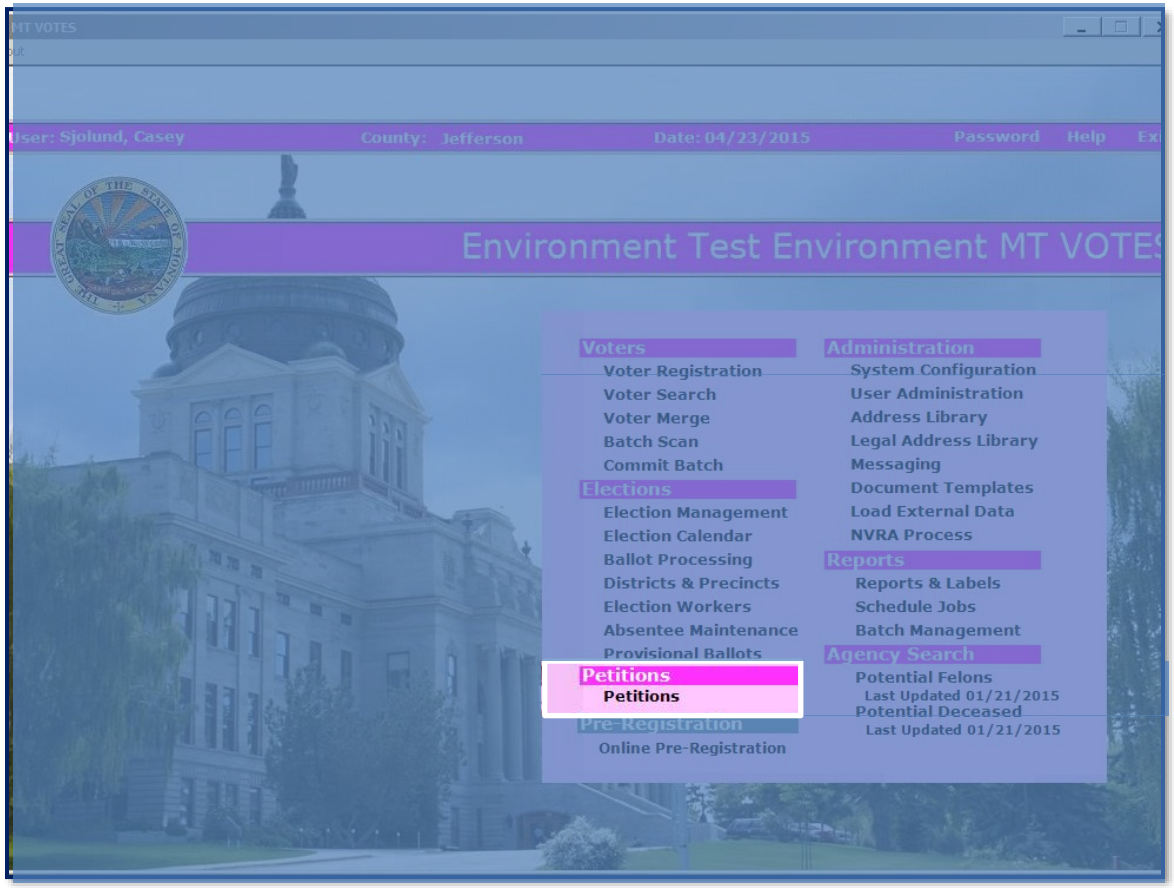
DAFFY DUCK
Printed Name of Signature Gatherer

Daffy Duck
Signature

Creating Petitions

Secretary of State
Corey Stapleton

To **Create** petitions in MT VOTES, click on **Petitions** in the Petitions menu.

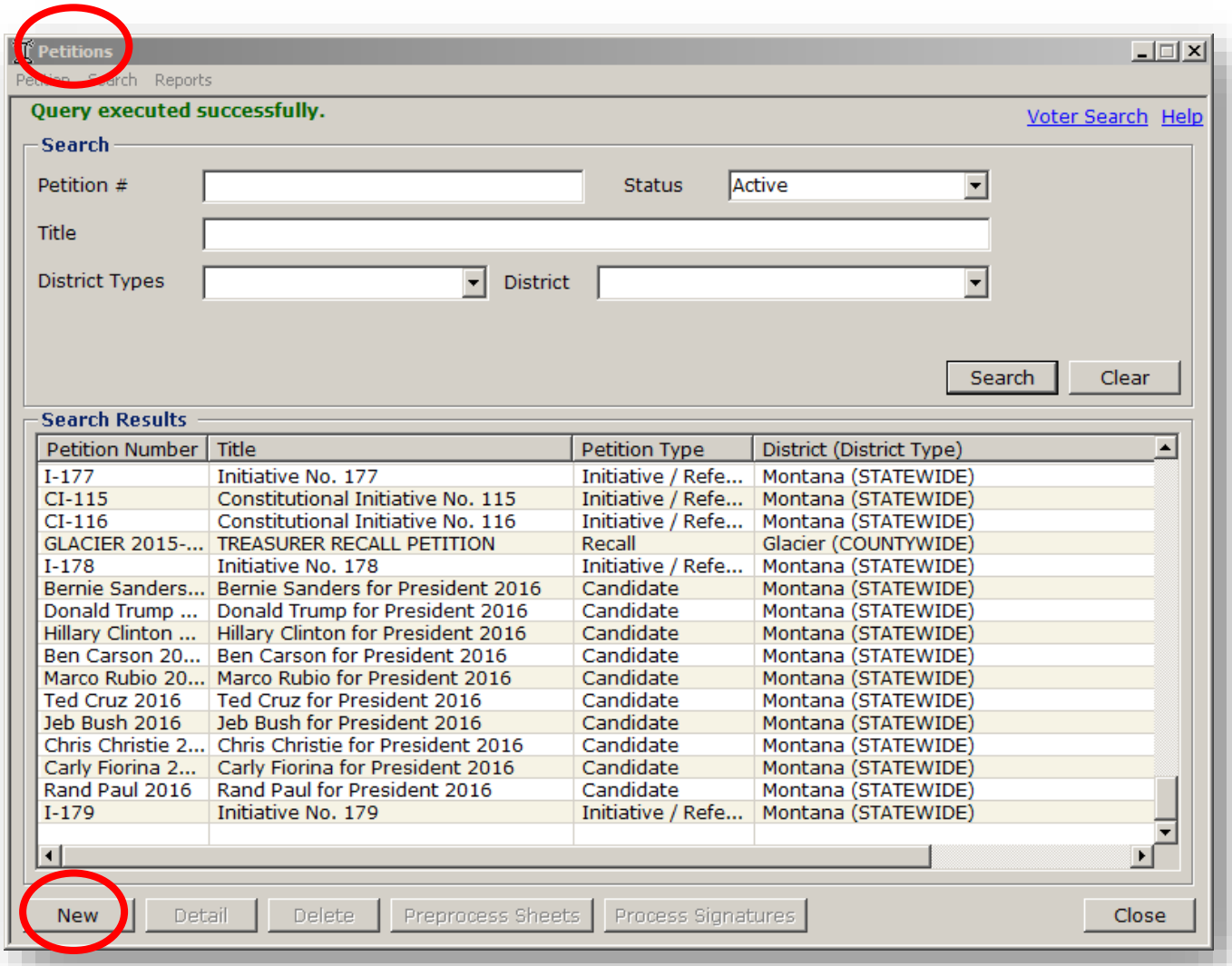


Creating Petitions

Petitions screen. (**Active** petitions will show by default.)

SOS will create any **statewide** petitions.

County election officials create **local** petitions by clicking **"New"**.



Creating Petitions

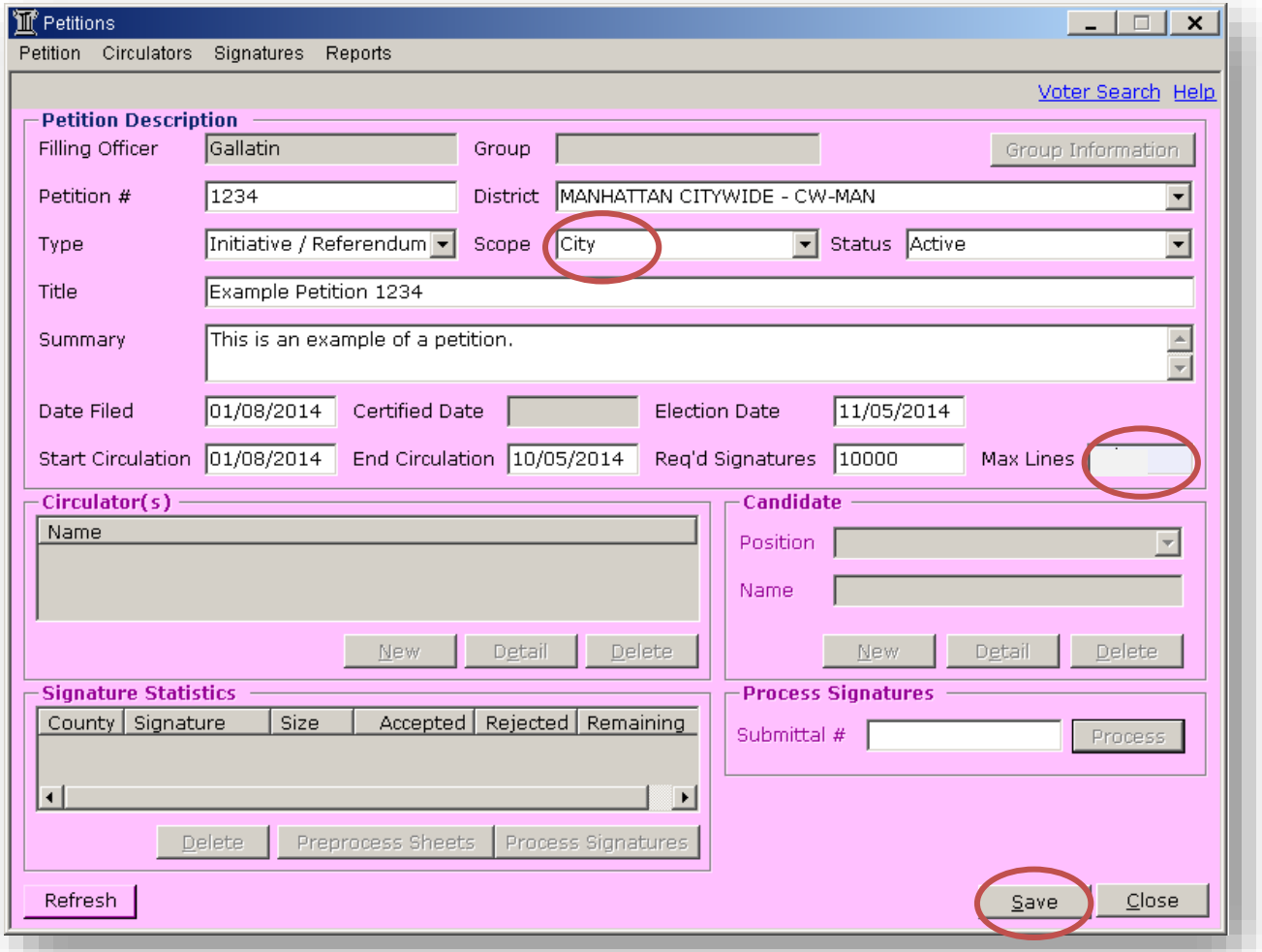
Example of filled fields:

Scope - choose correct political subdivision.

- Fill in all the petition fields information.

- Leave **Max Lines** field **blank.**

- Click **Save** to store the new Petition.



Circulators

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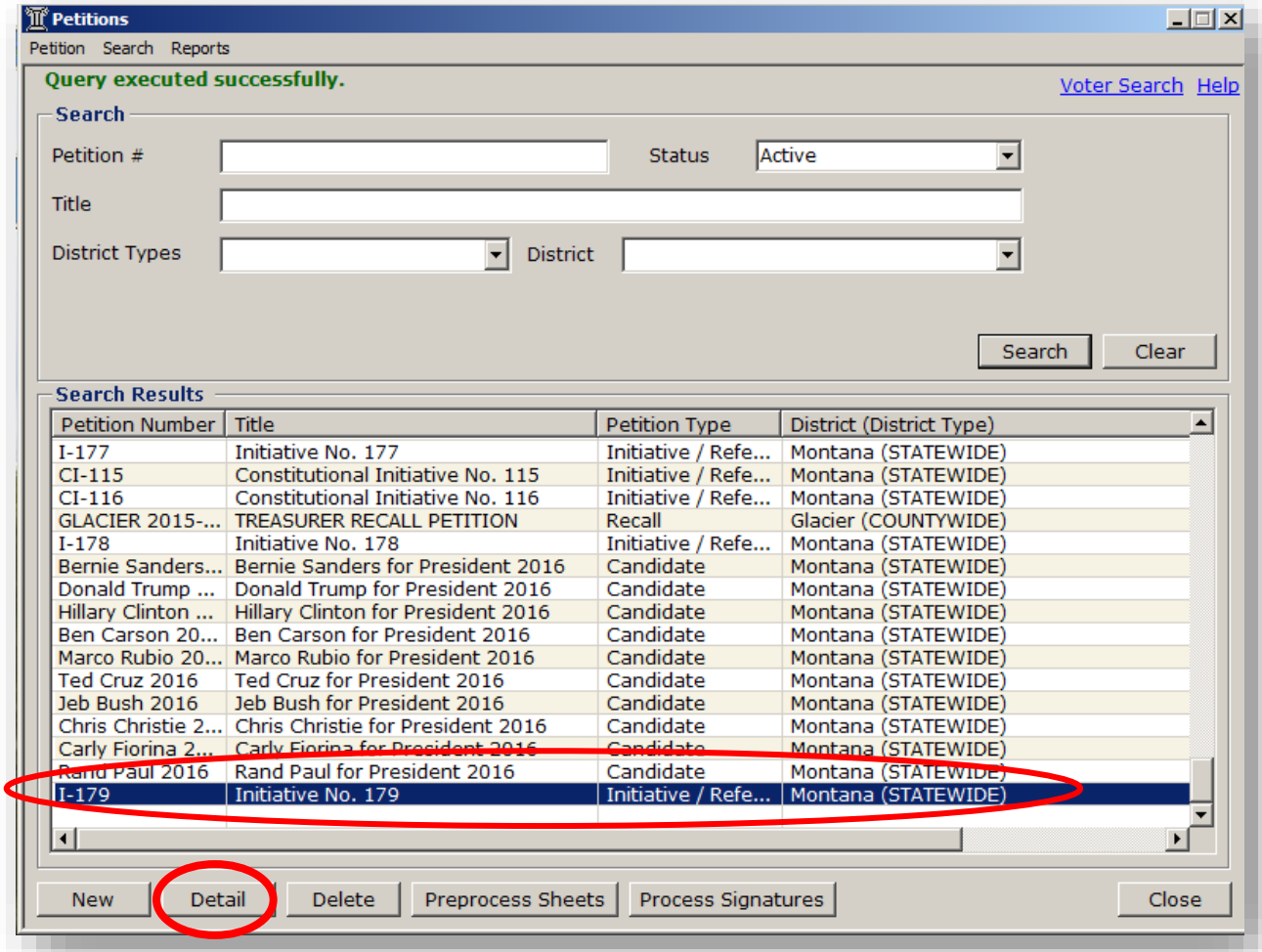
MONTANA SECRETARY OF STATE

Circulators are Signature Gatherers

Petitions Screen:

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

- Click **Detail.**

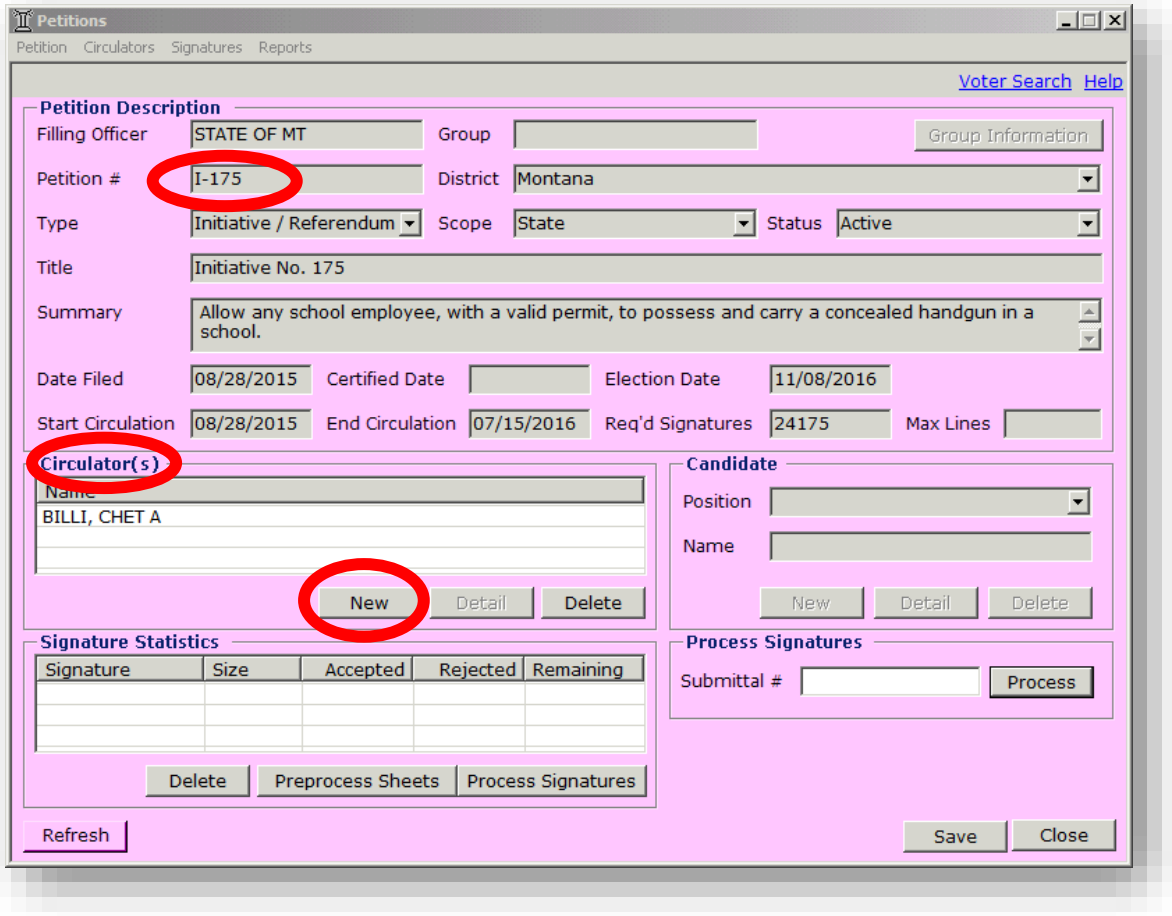


Circulators

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.



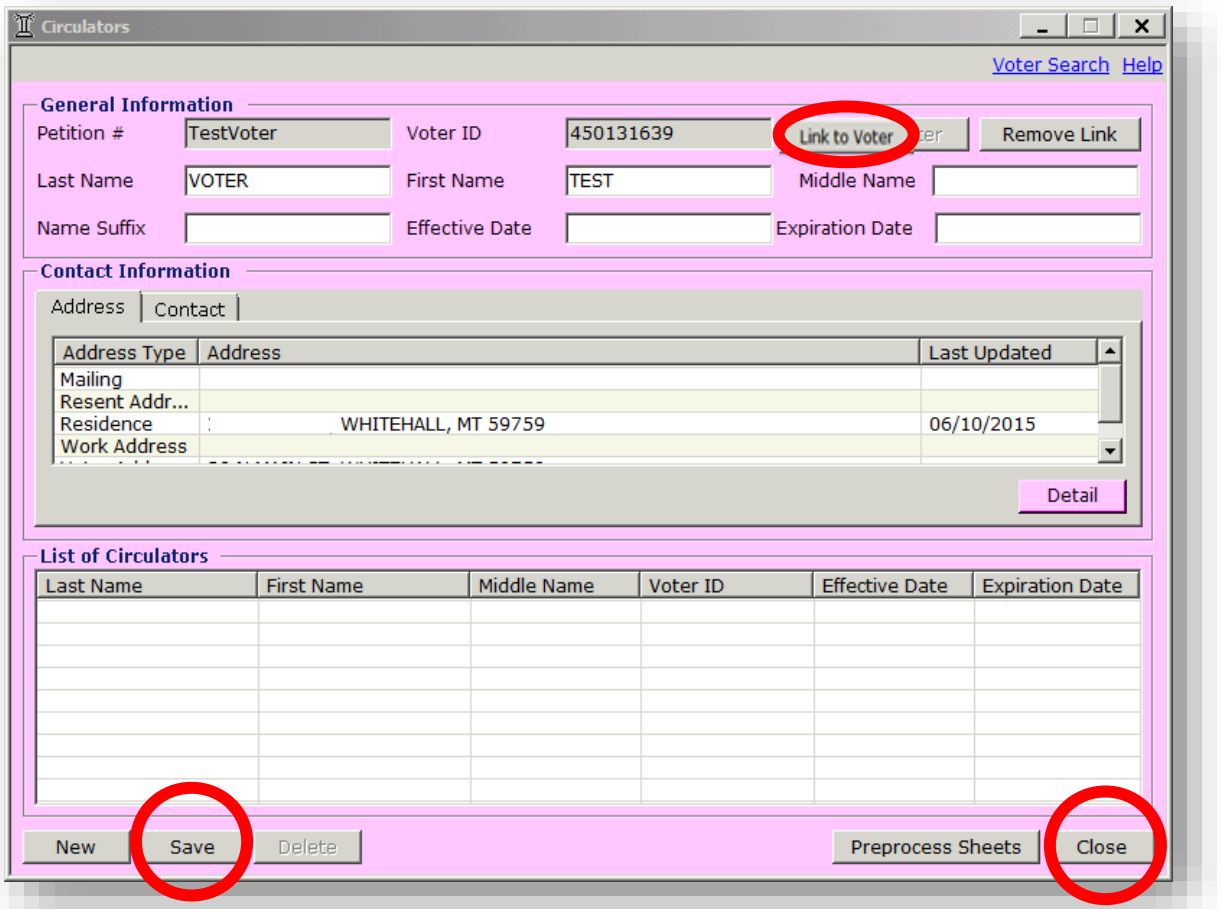
Circulators

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.

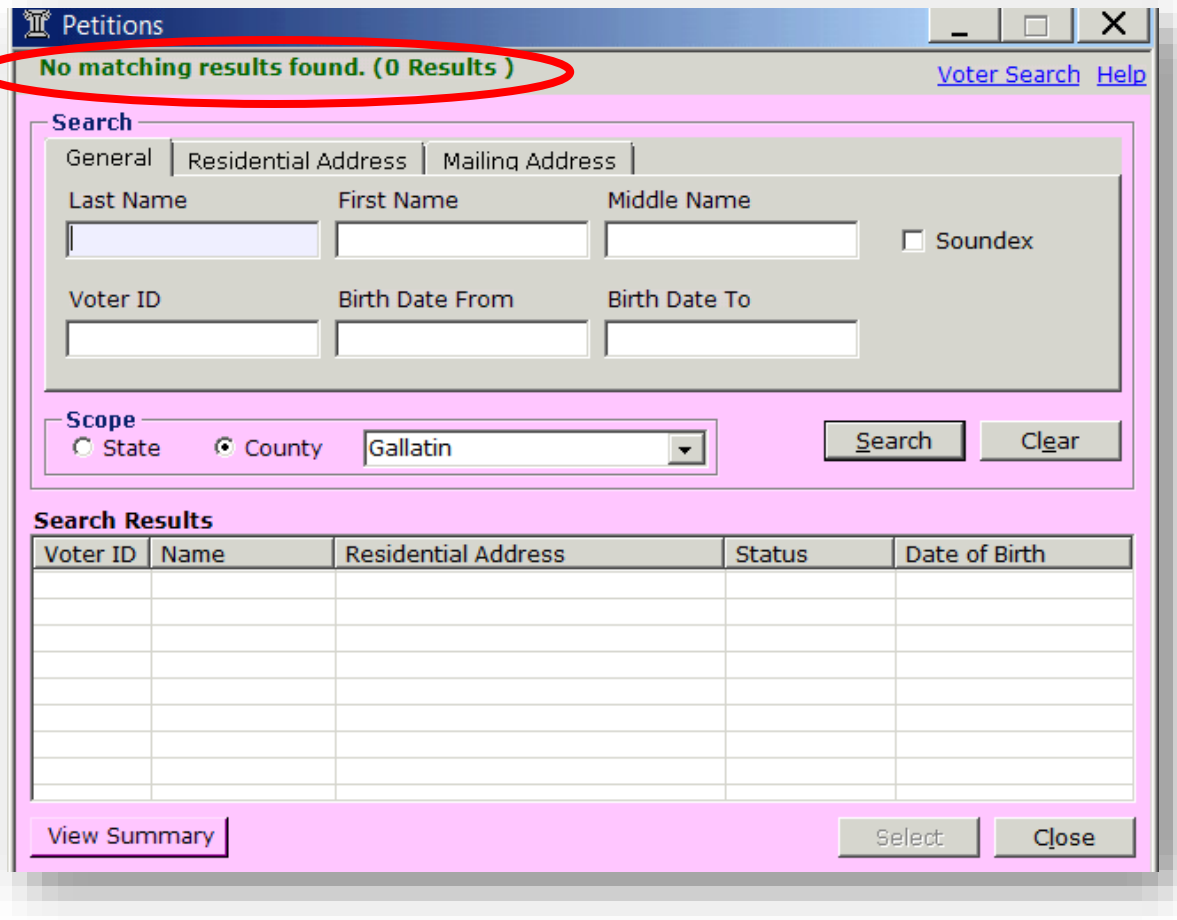


Circulators

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.

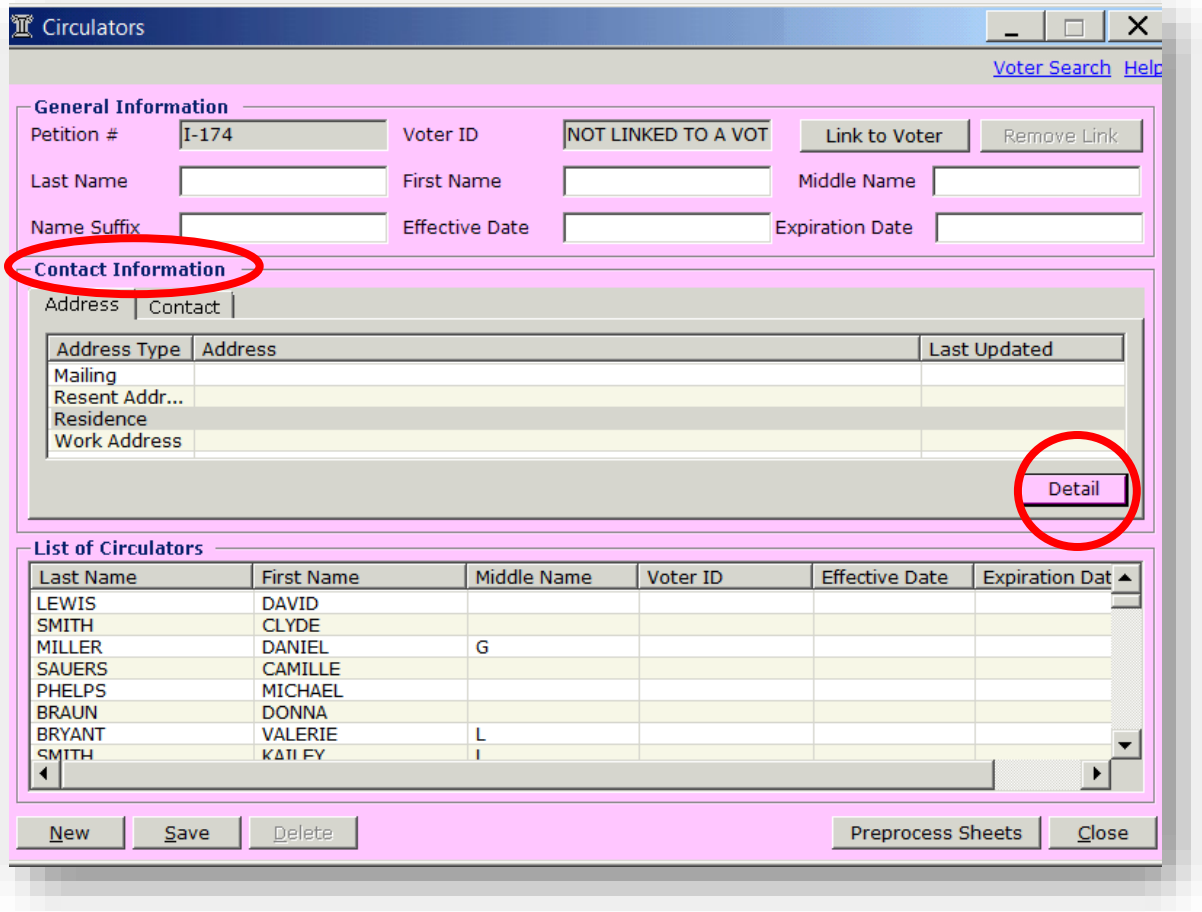
You can click on the **State** button and **Search** statewide, then **Select** if found.

If not found, click **Close** to enter the circulator information manually.



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.



Circulators

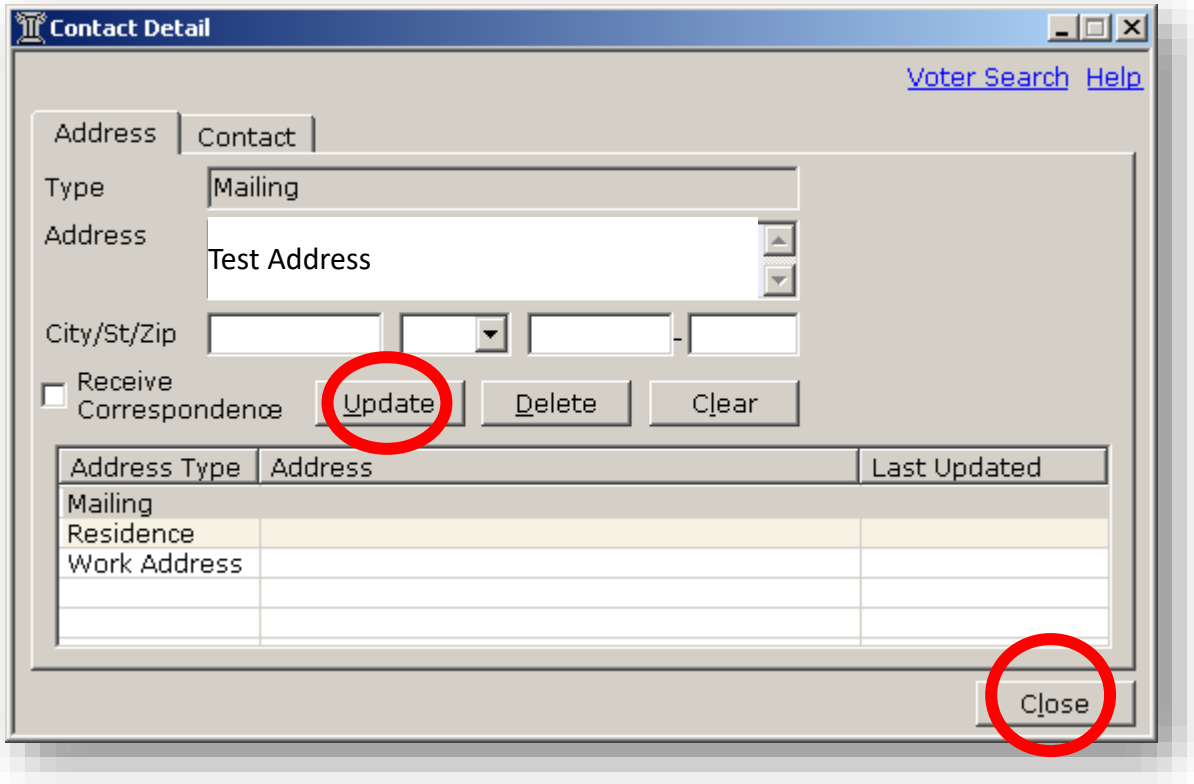
Contact Detail

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.



Petition Preprocessing

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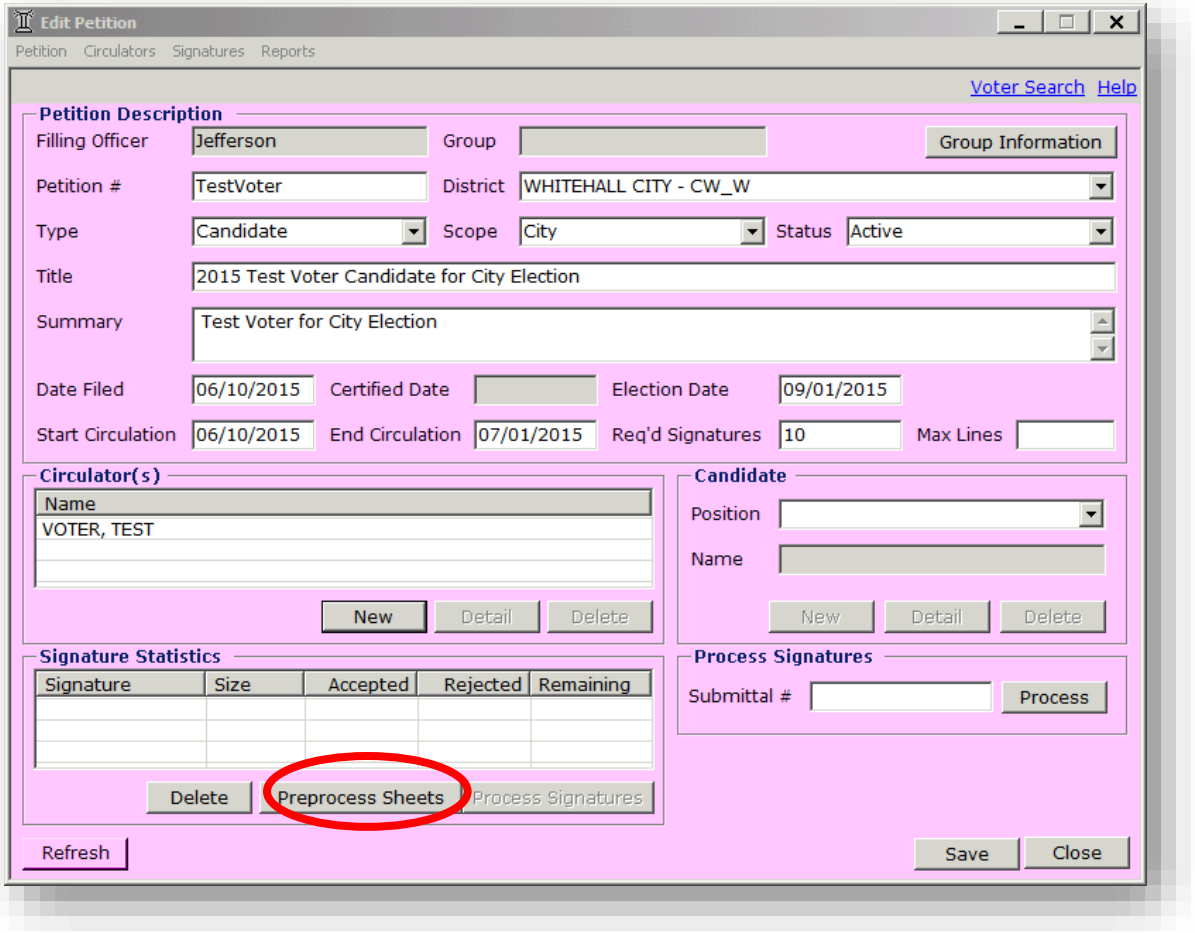
MONTANA SECRETARY OF STATE

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.**



Petition Preprocessing

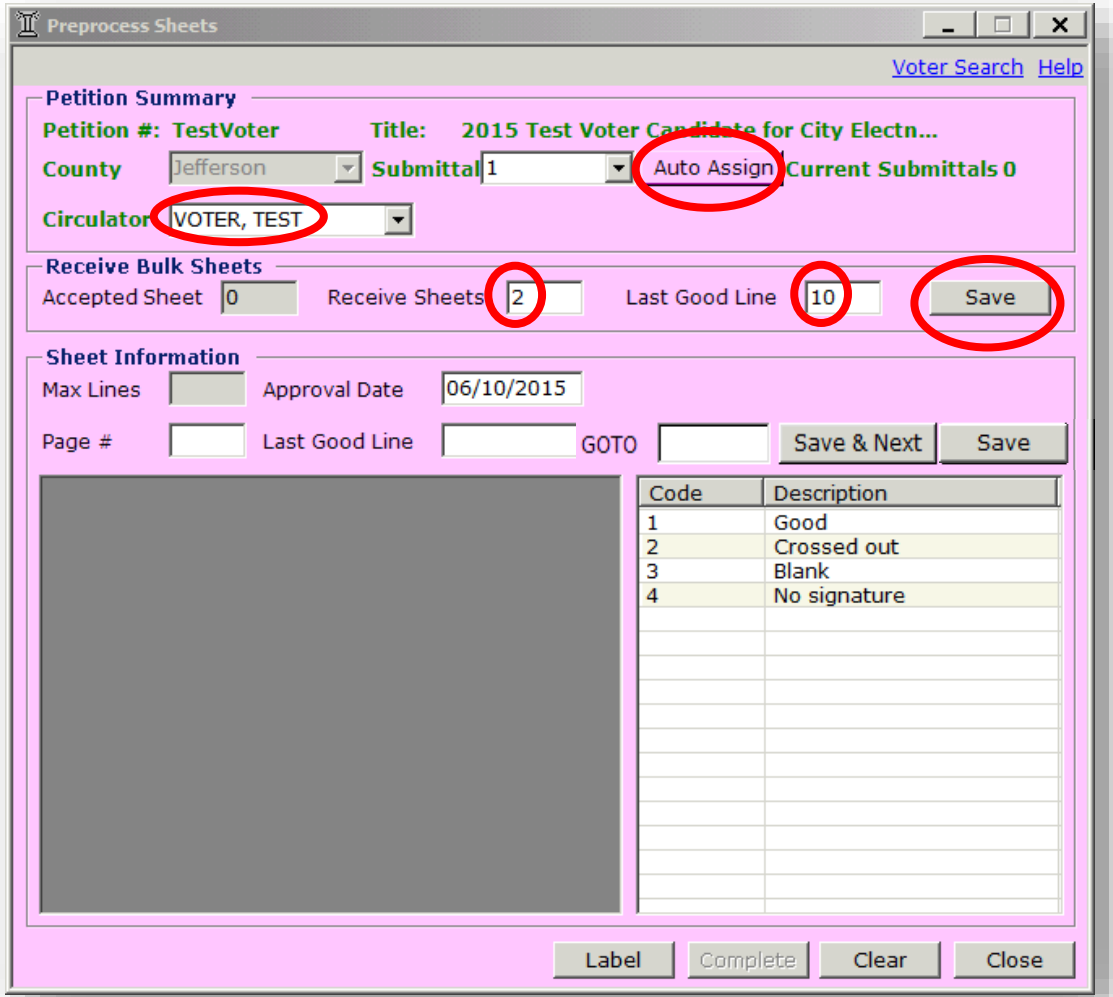
Click **Auto Assign** to give these sheets a Submittal number.

(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**.



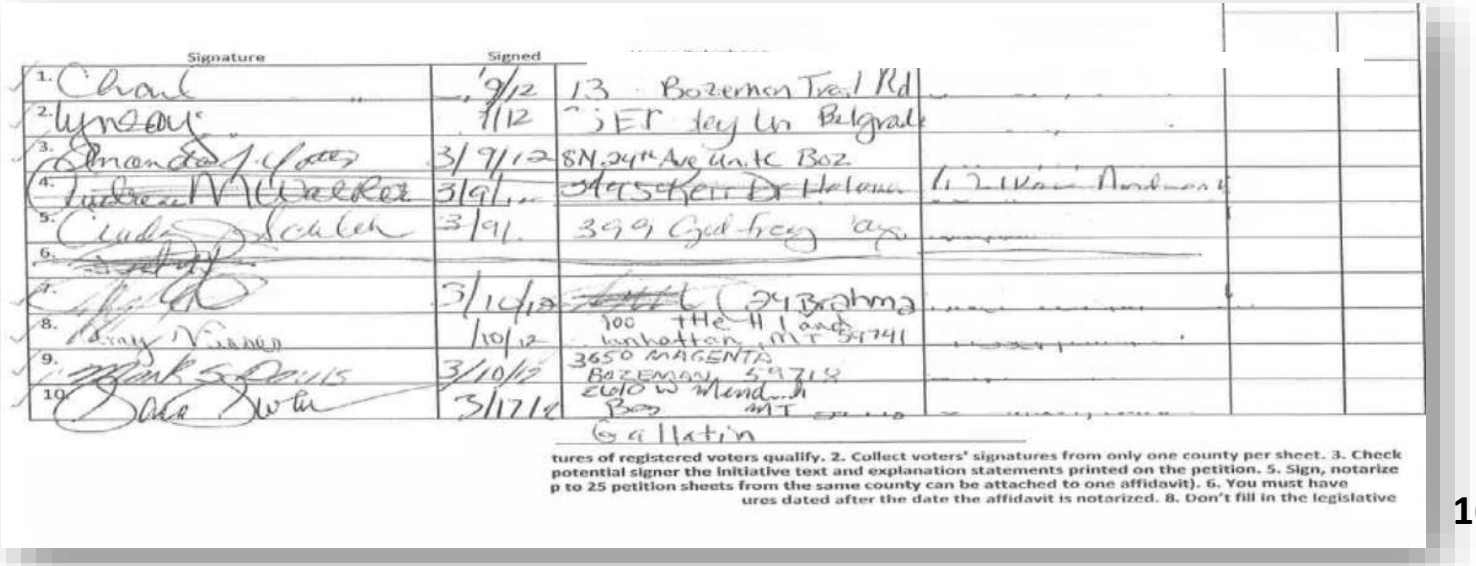
Petition Preprocessing

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



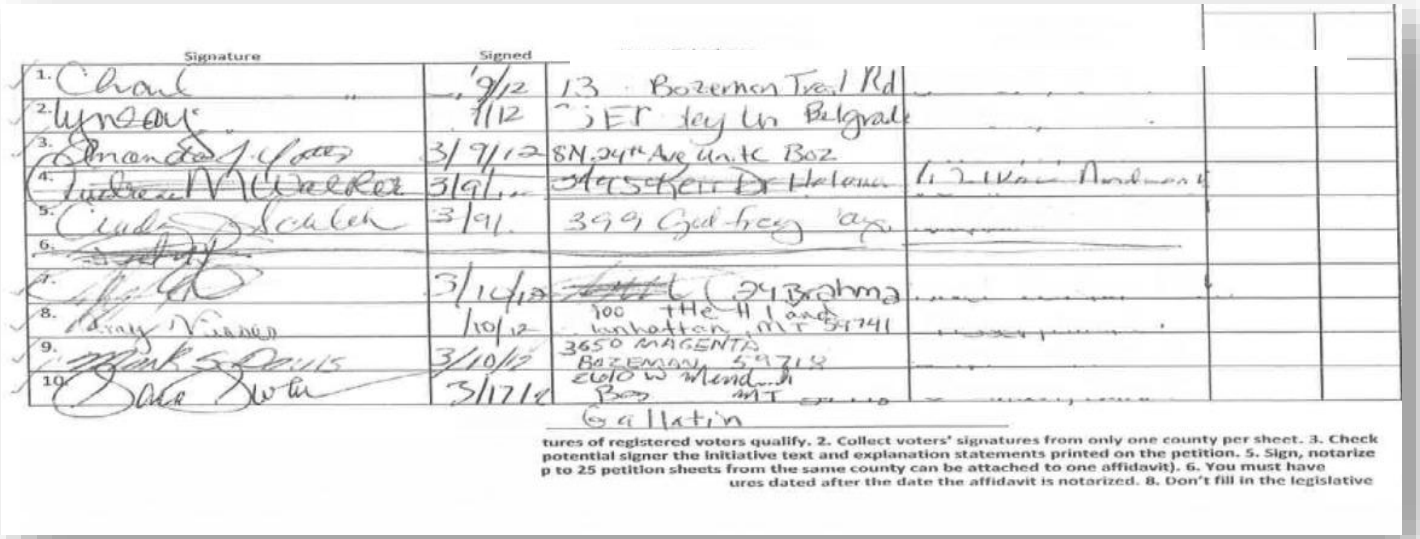
Petition Preprocessing

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

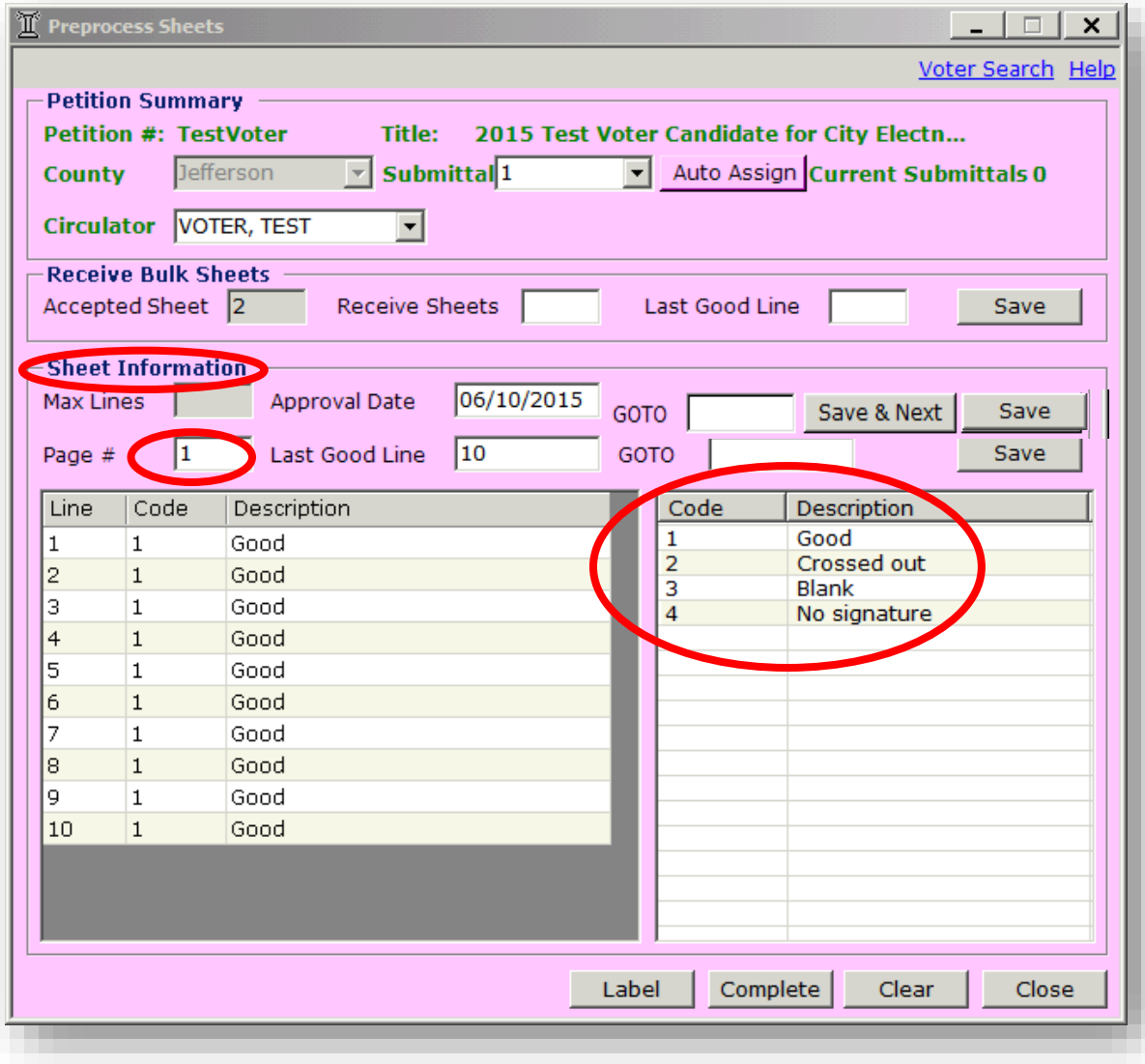


Petition Preprocessing

Sheet Information

In **Page #** field, enter **“1”** then tab to the next field. Enter the **Last Good Line** quantity for that page.

In the **Line-Code-Description** area, click on the Code column and enter each applicable number in the Code column to match the lines on page 1 of your petition. (See the Code reference key to the right.)



Petition Preprocessing

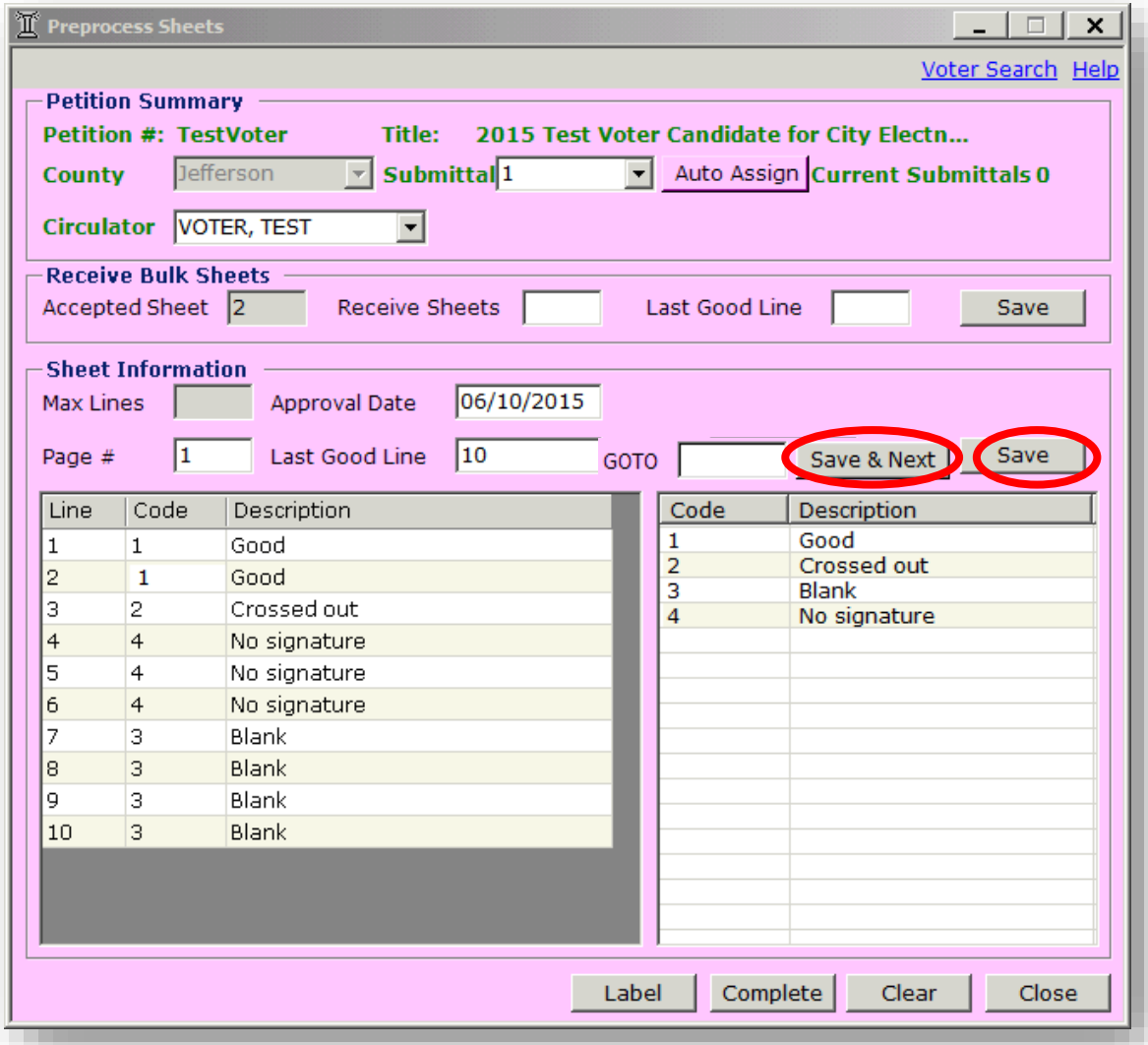
In this example, lines 1-2 have been given a status of **Good** (signature).

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.

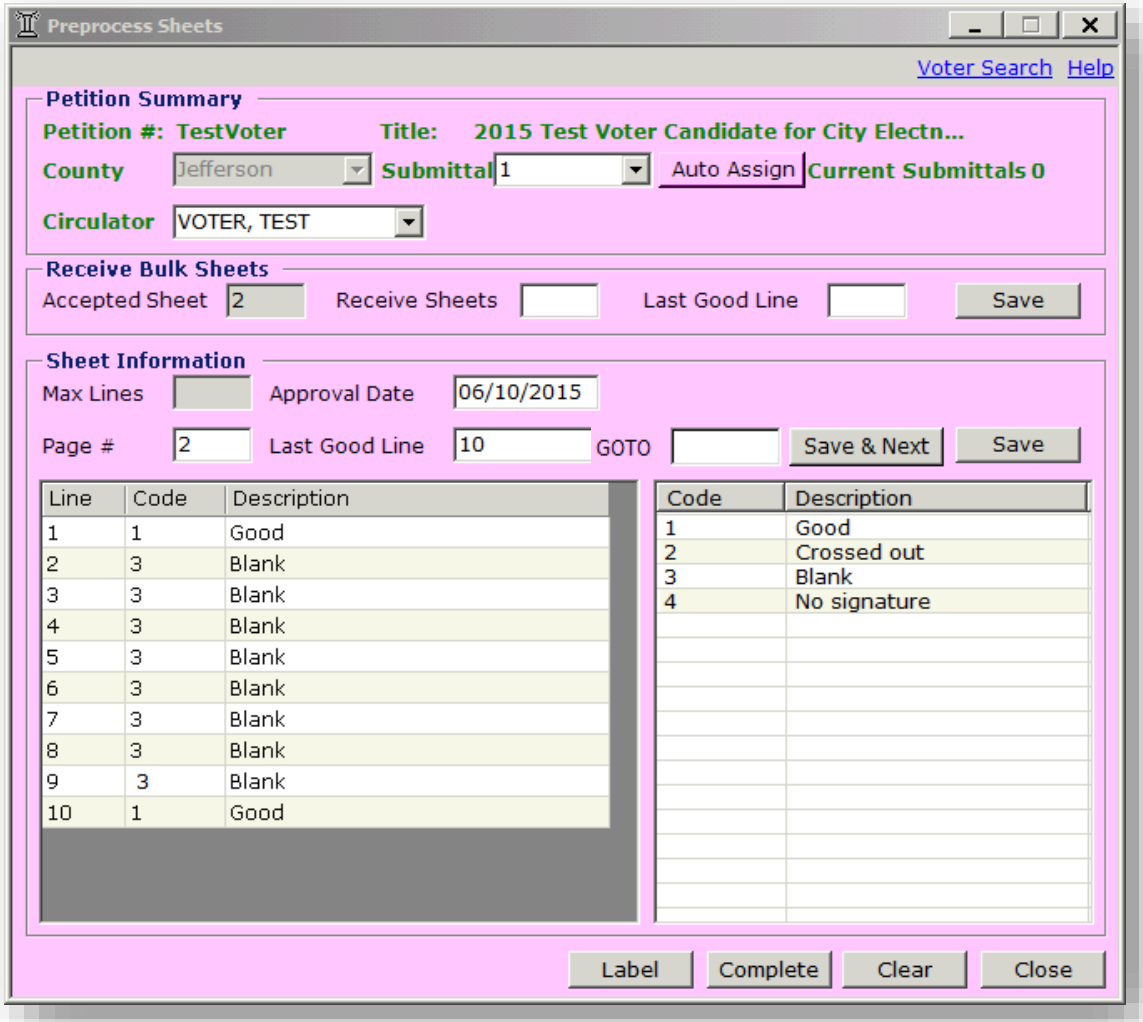


Petition Preprocessing

Repeat the process for Page #2 of the submittal and any additional pages.

WARNING: If you add more pages than needed, you will need to delete your submittal and start over **or** you'll need to process all signatures on the extra page(s) as blank lines.

Next, you can print a label to put on the affidavit.



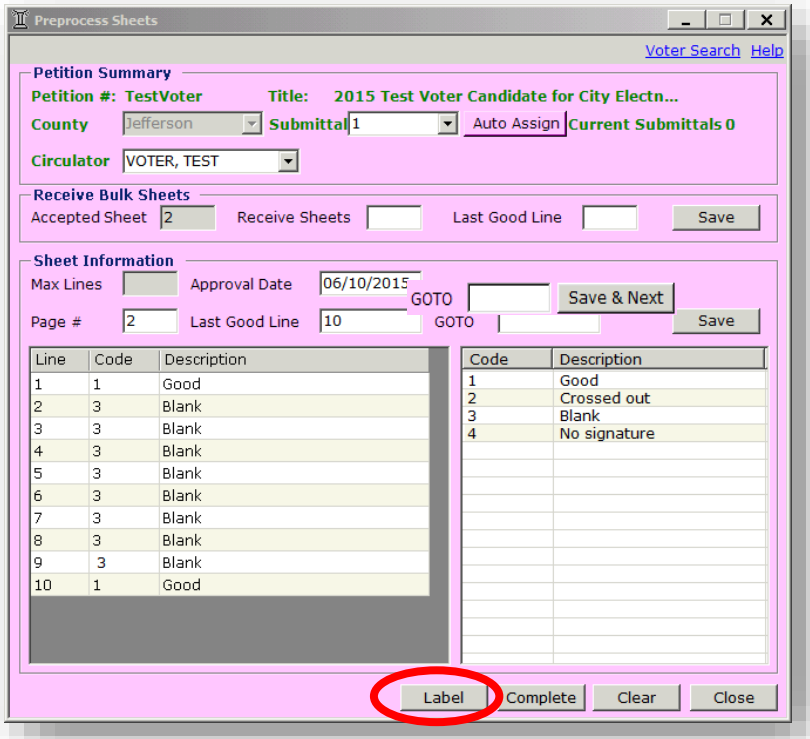
Petition Preprocessing

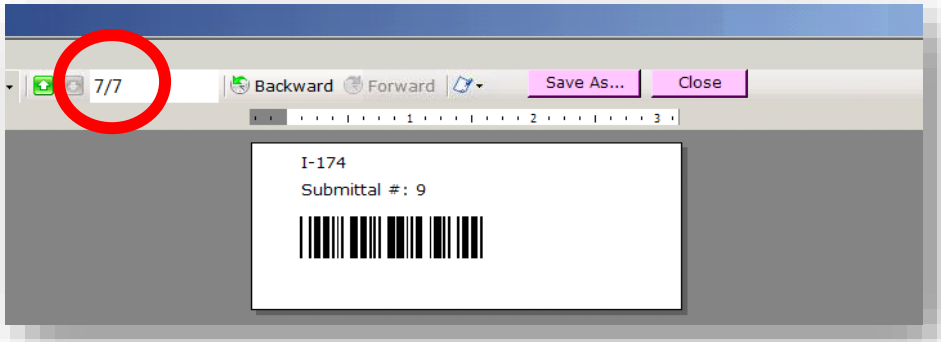
To print labels for your submittals, click the **Label** button at the bottom of the Preprocess Sheets page.

(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.

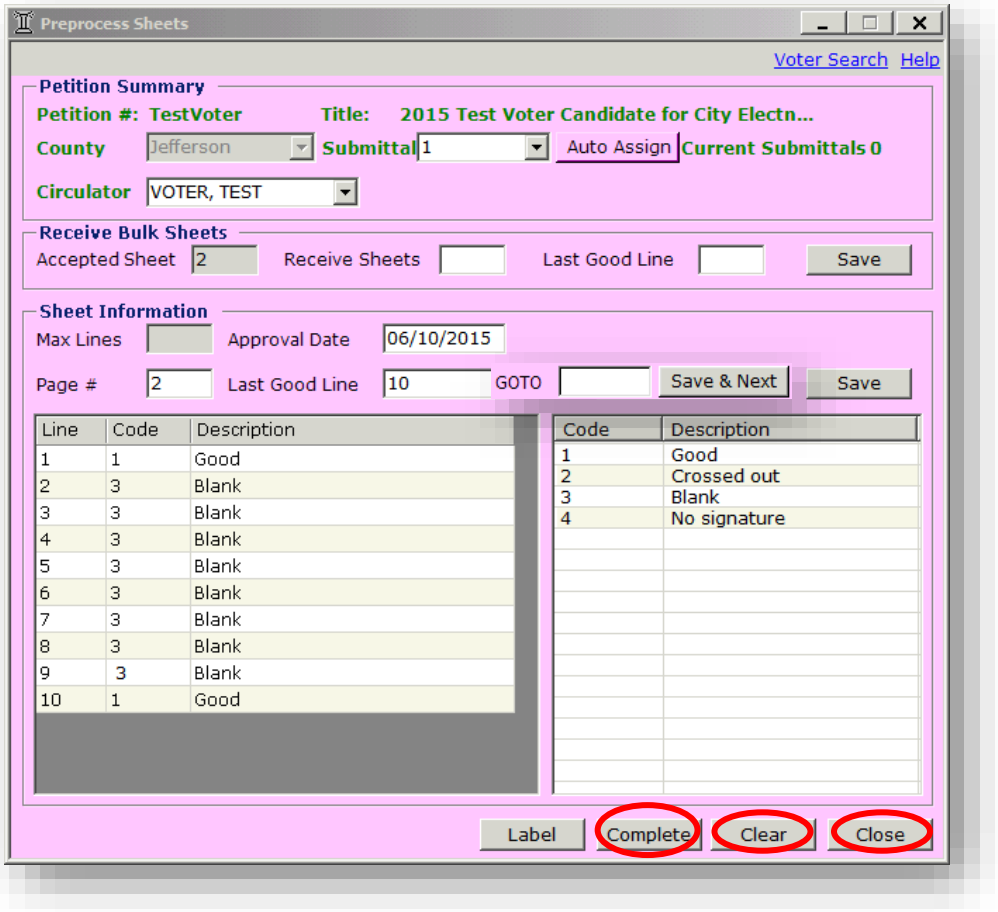




Petition Preprocessing

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

Click them in this order.



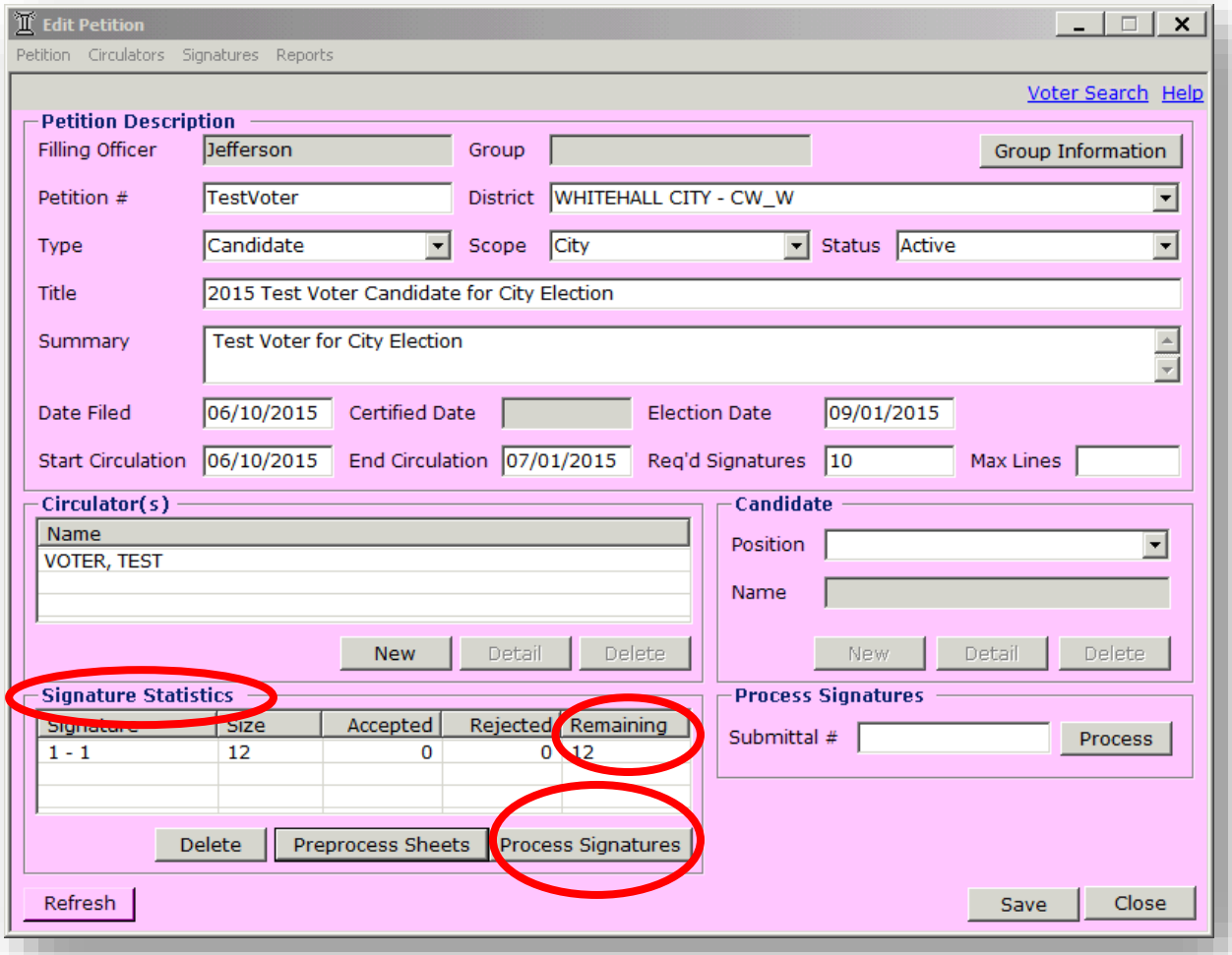
Processing Signatures

CHRISTI JACOBSEN
MONTANA SECRETARY OF STATE

You will be returned to the Petitions screen. You will now see the submittal in the **Signature Statistics** section at the bottom of the Petition page.

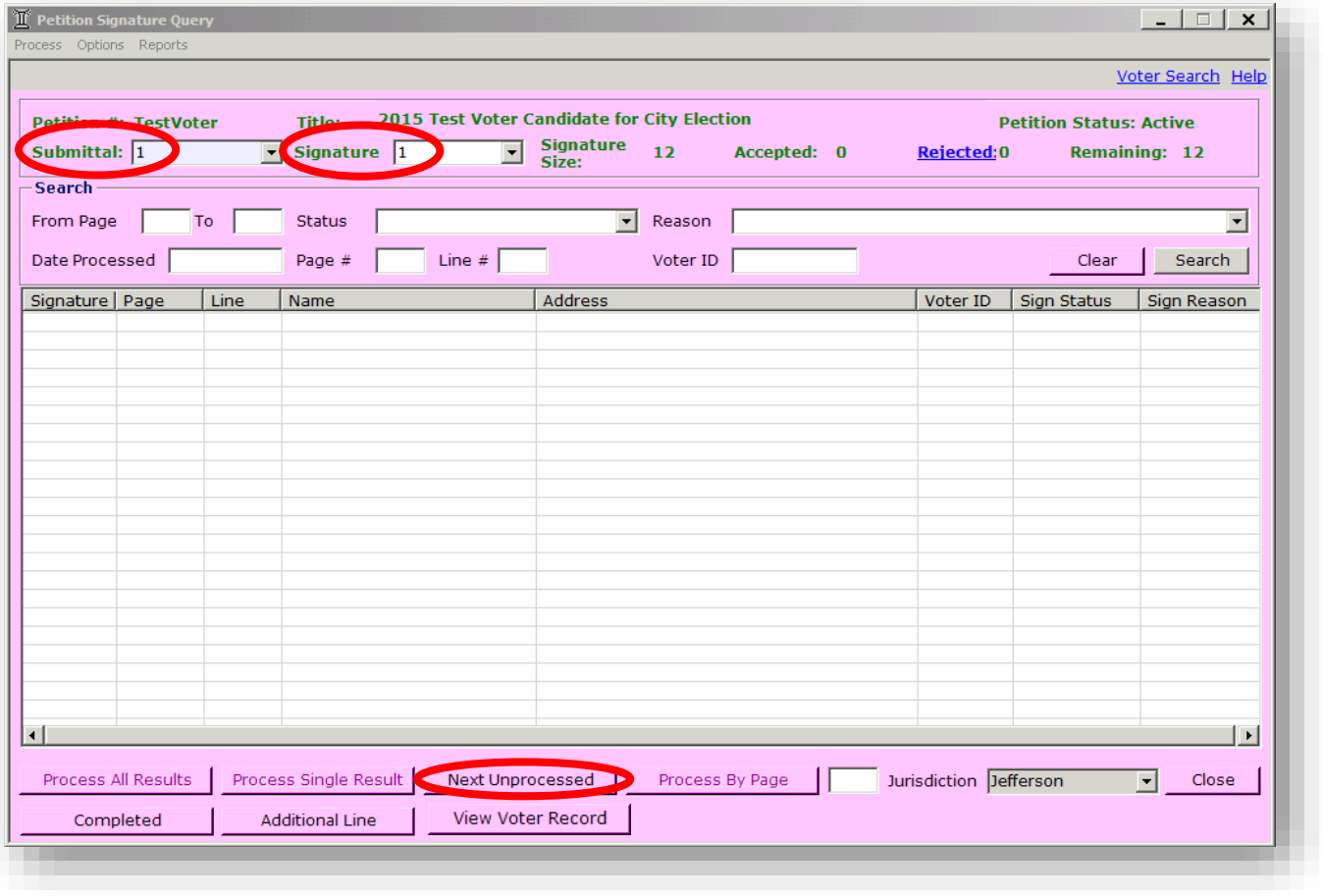
As you can see, in this example there are **12 out of 12** signatures **Remaining** to process.

Now, highlight the submittal you want to process and click the **Process Signatures** button.



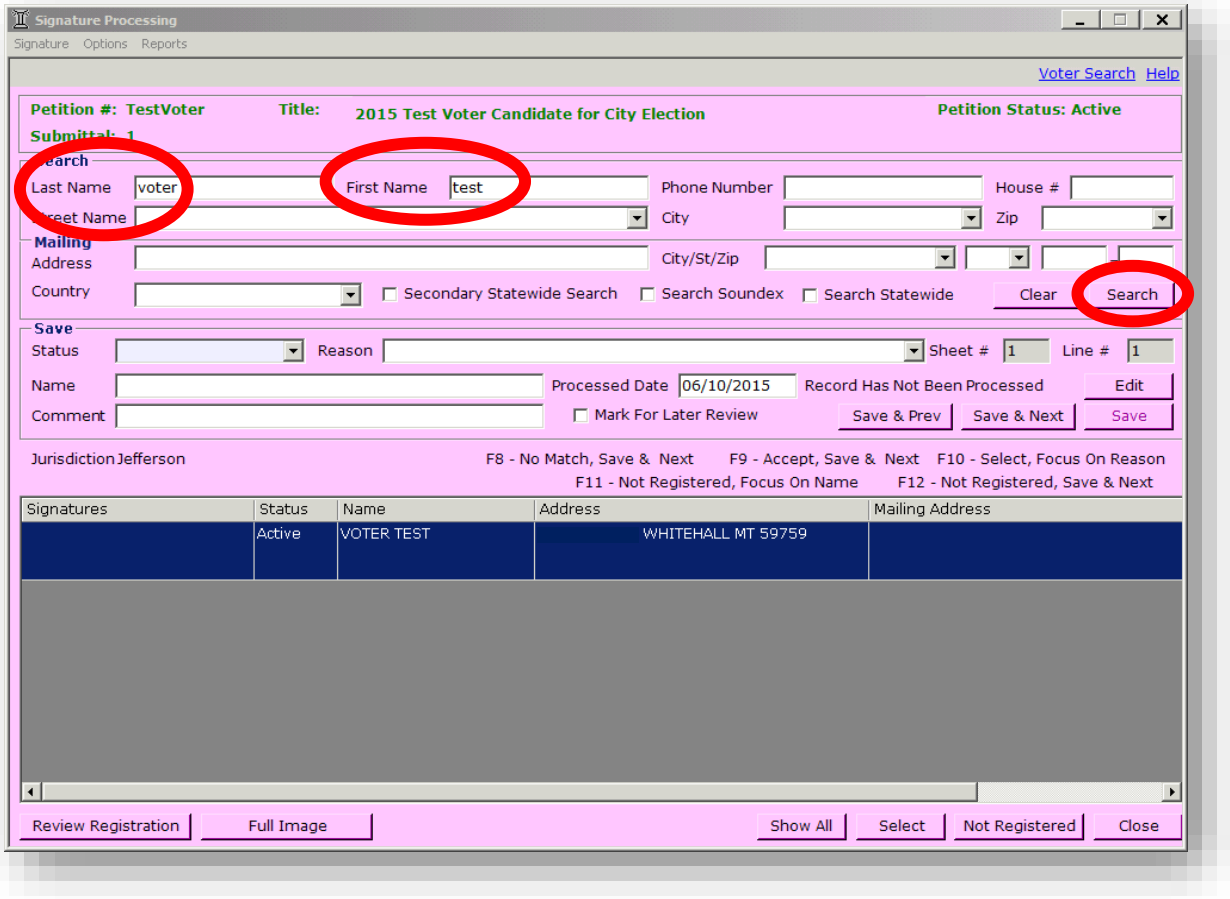
Processing Signatures

Ensure that you are on the correct **Submittal,** and **Signature**, and click the **Next Unprocessed** button to start processing the signatures of this submittal.



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.

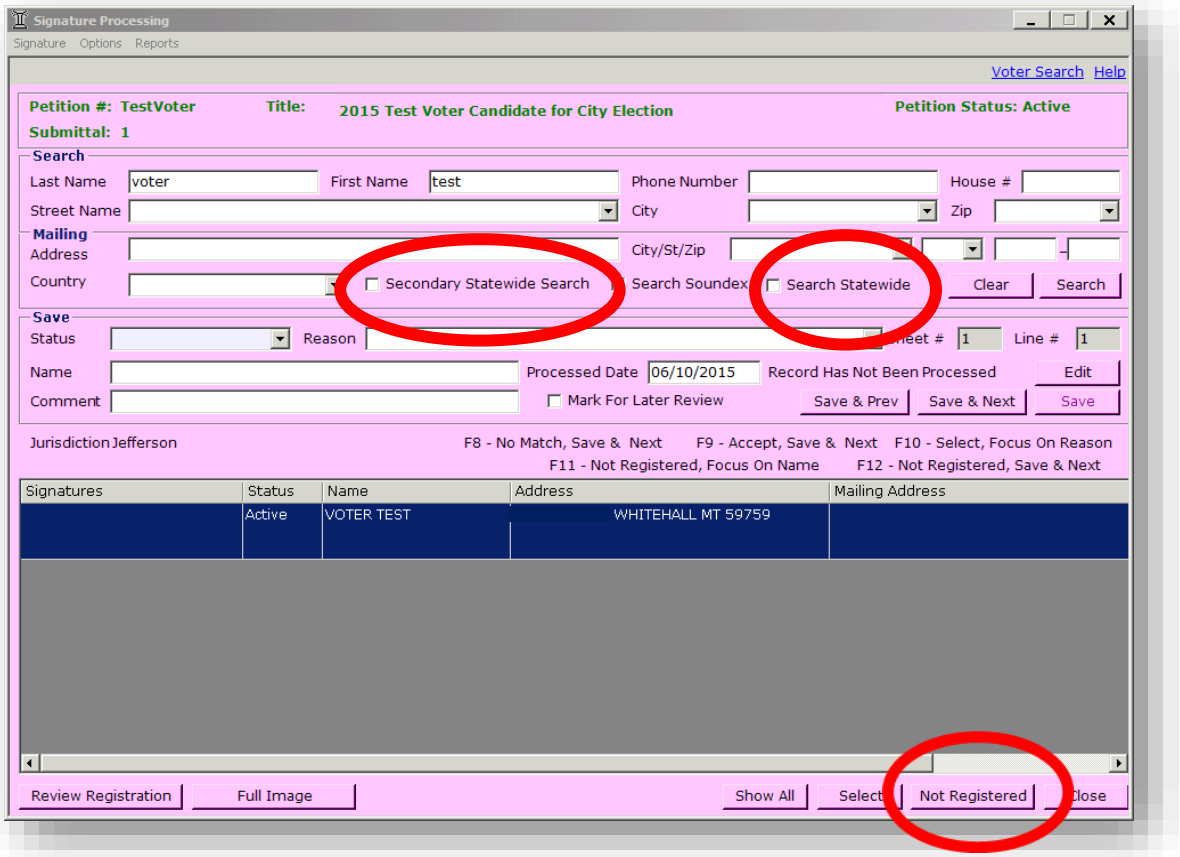


Processing Signatures

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.

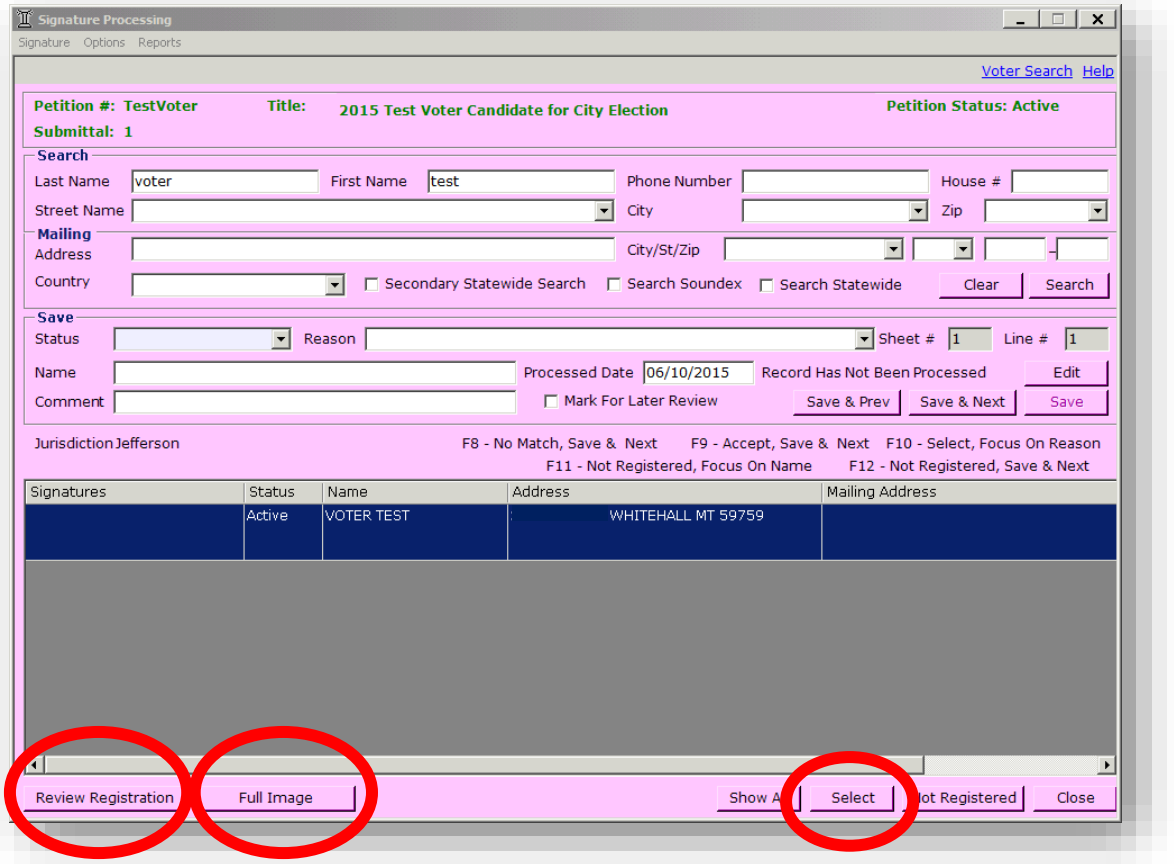
If a voter ***is*** found in another county, then click "**Not Registered**".



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.



Processing Signatures

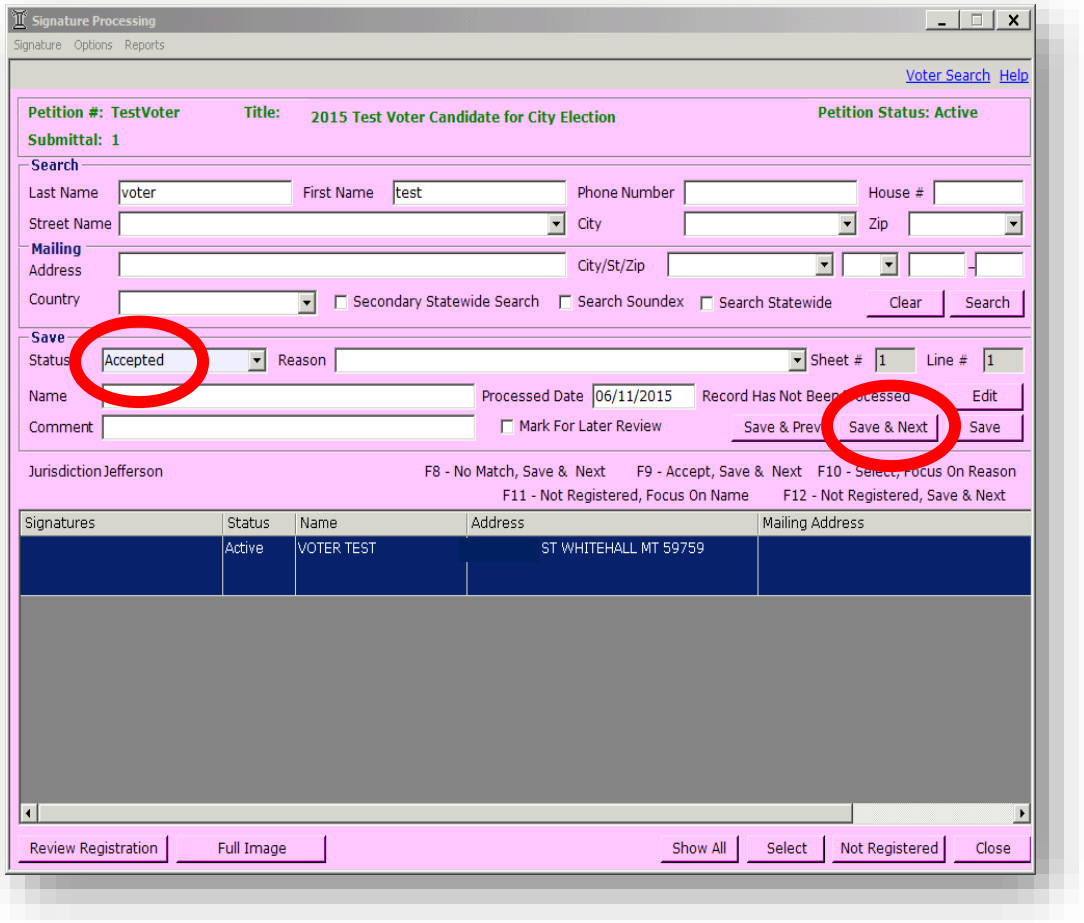
You have two options for each signature:

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.



See Appendix A for explanations of these samples

Sample Petition Signature Sheet

	Training Note: Counted or Not?	Signature	Date Signed	Residence Address or P.O. Address or Home Phone	Printed Last Name, First and Middle Initials	For County Election Office Use Only: Legis. Rep. Dist. #	For County Election Office Use Only: Rsvd
1	Not counted: All information is illegible	*illegible*	1-7	*illegible*	*illegible*	Signers do not fill in this section; it is for optional election office use only	
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 *Gerry Tall*, 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.		

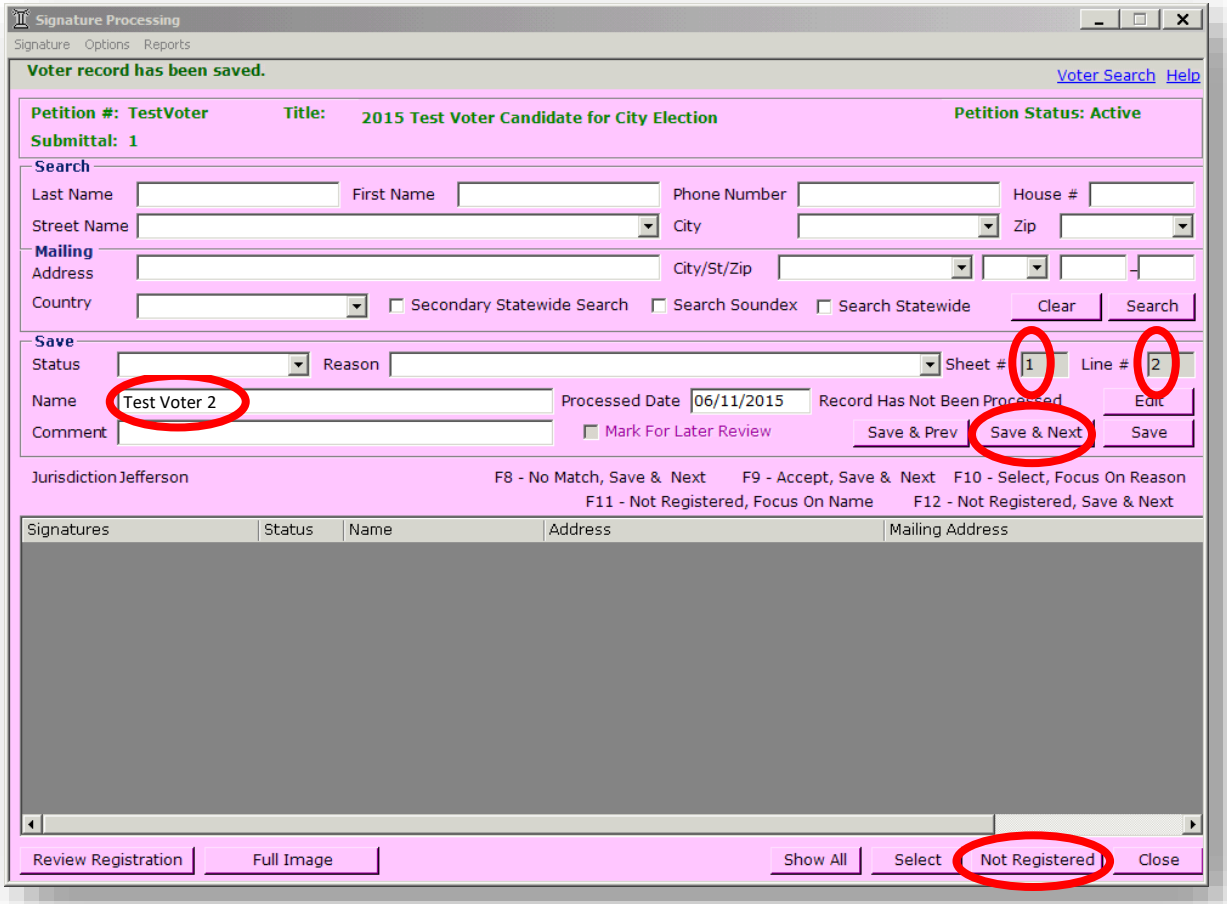
County: Lewis and Clark

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.

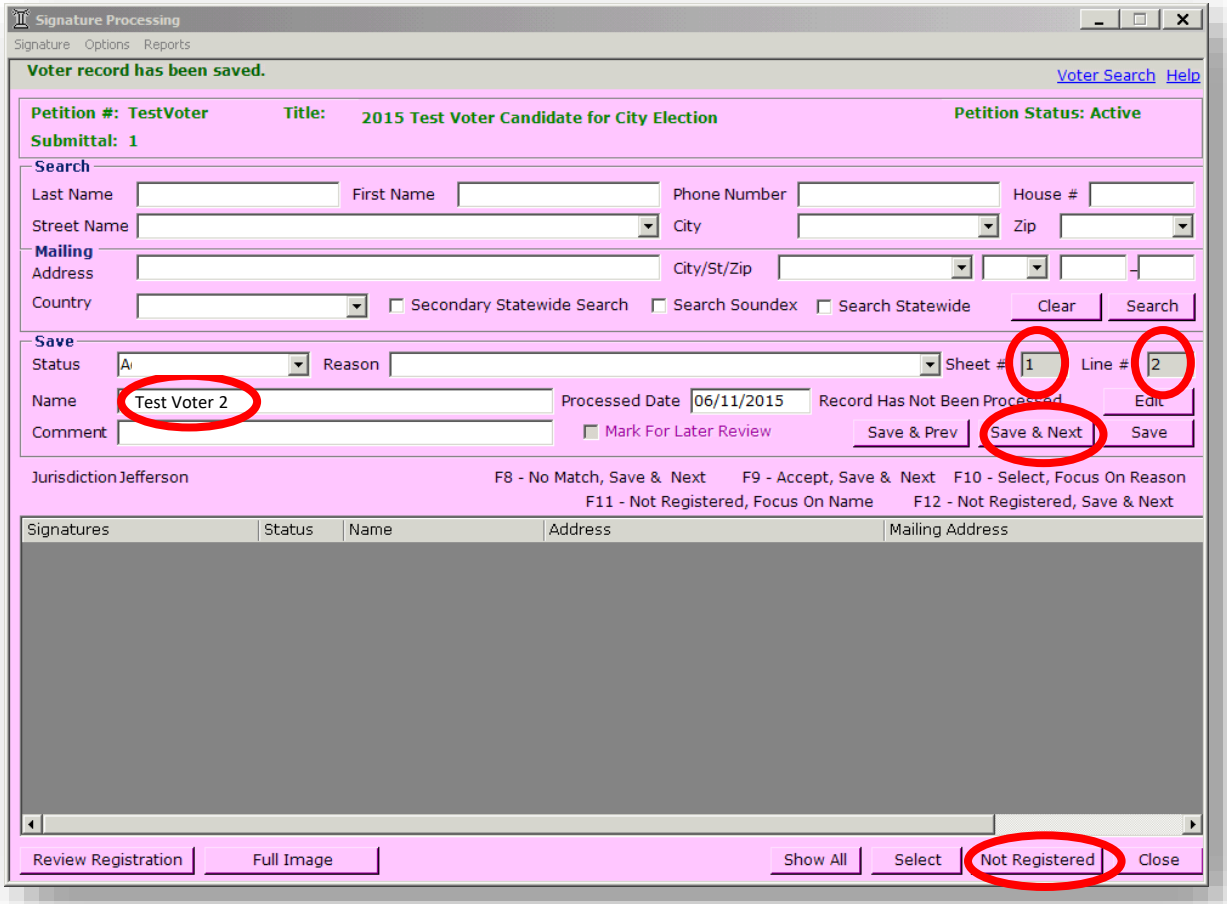


Processing Signatures

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.



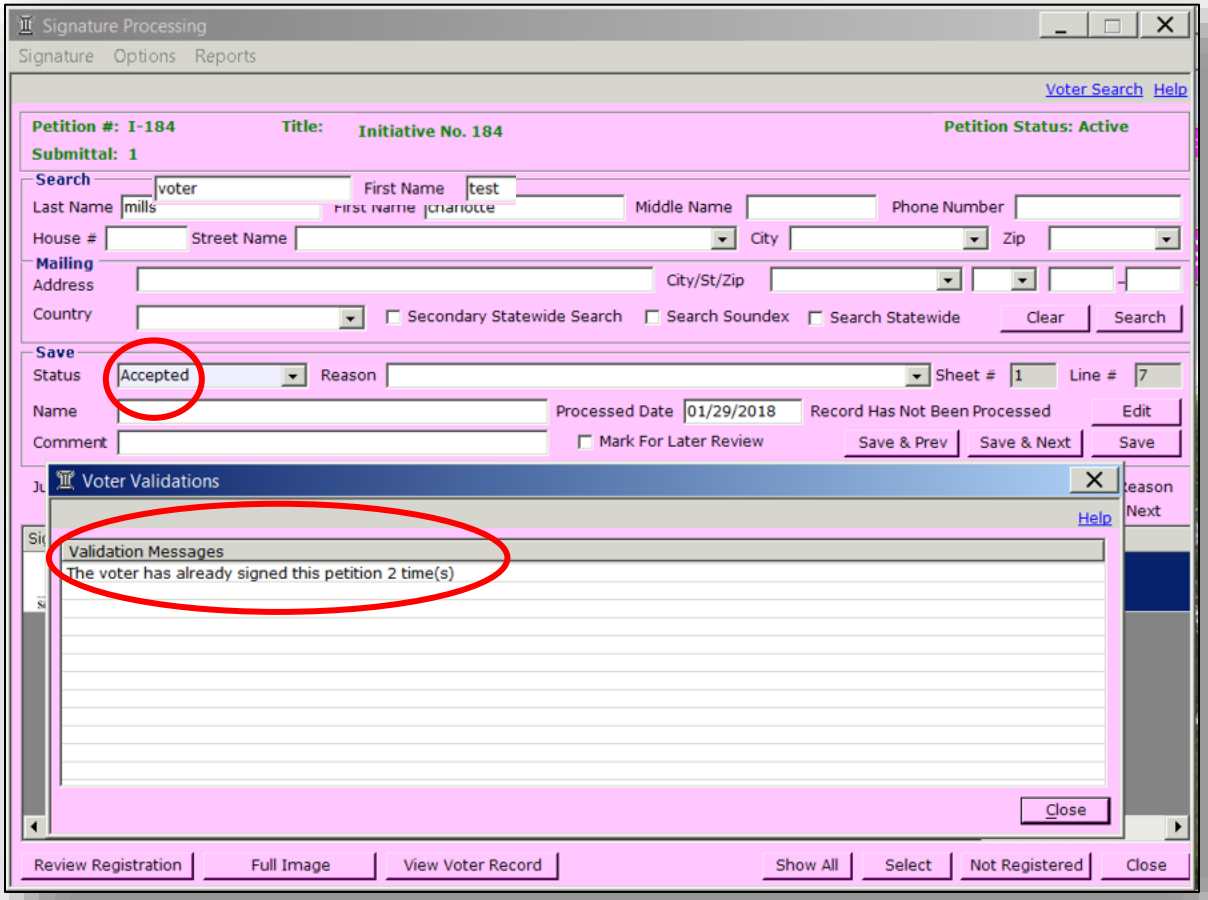
Then click **Save and Next.**

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**.

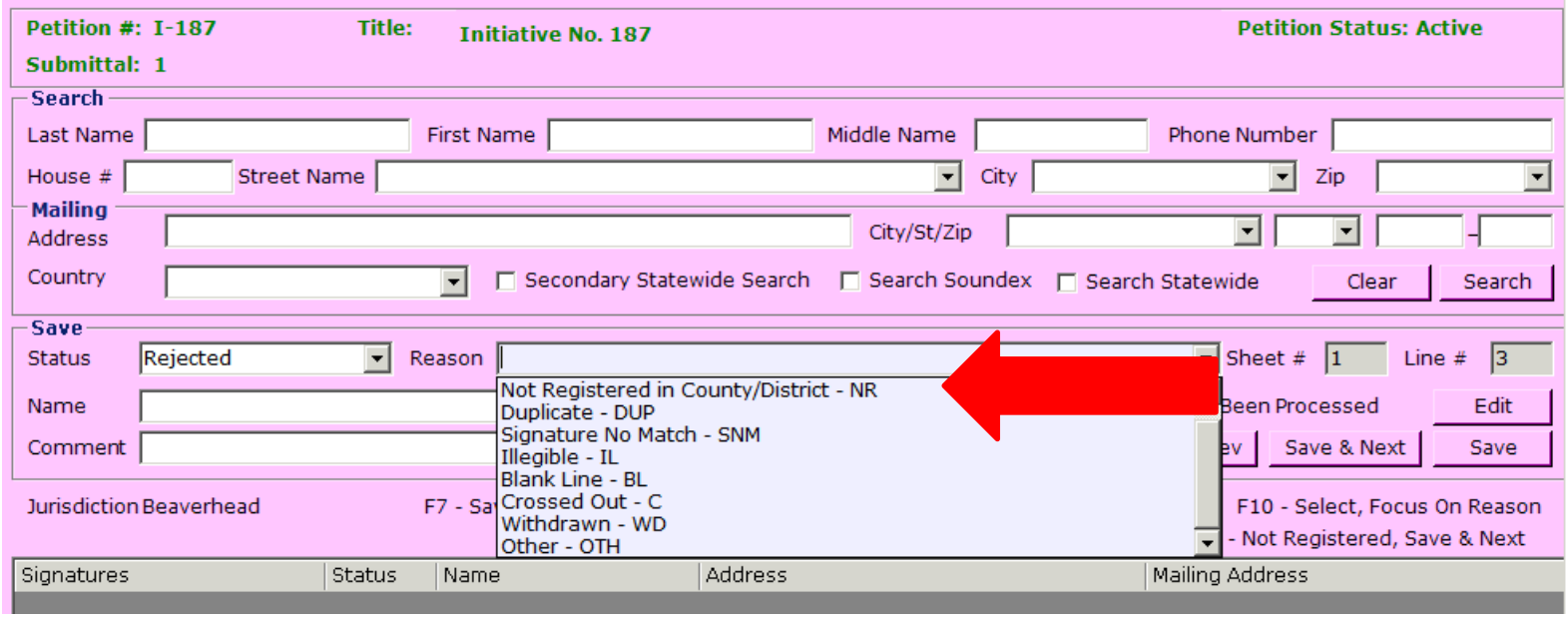
Click **Save & Next.**



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.**

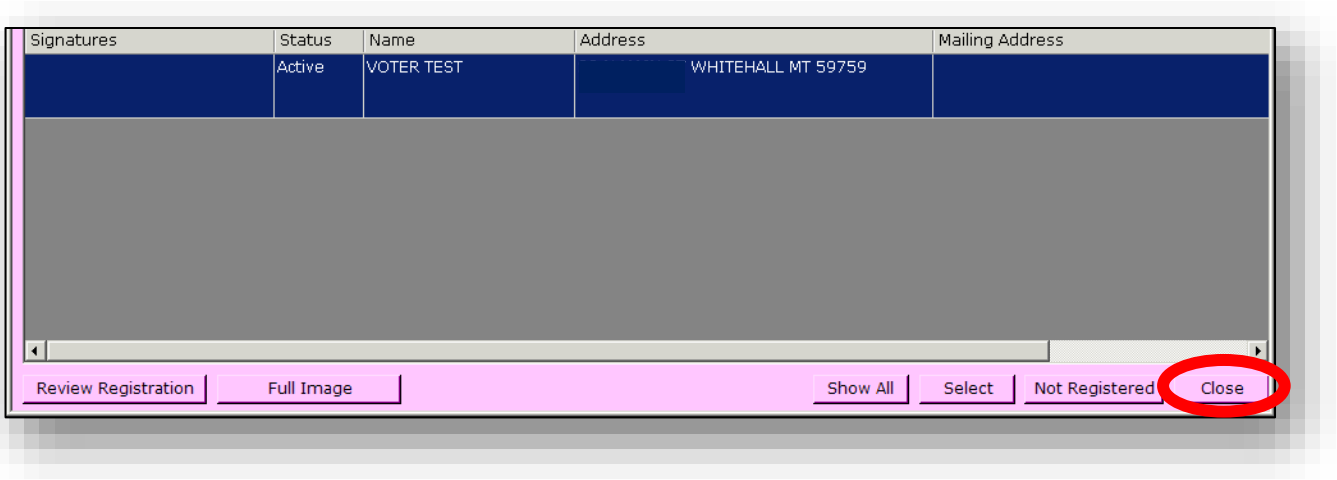


Processing Signatures

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.**



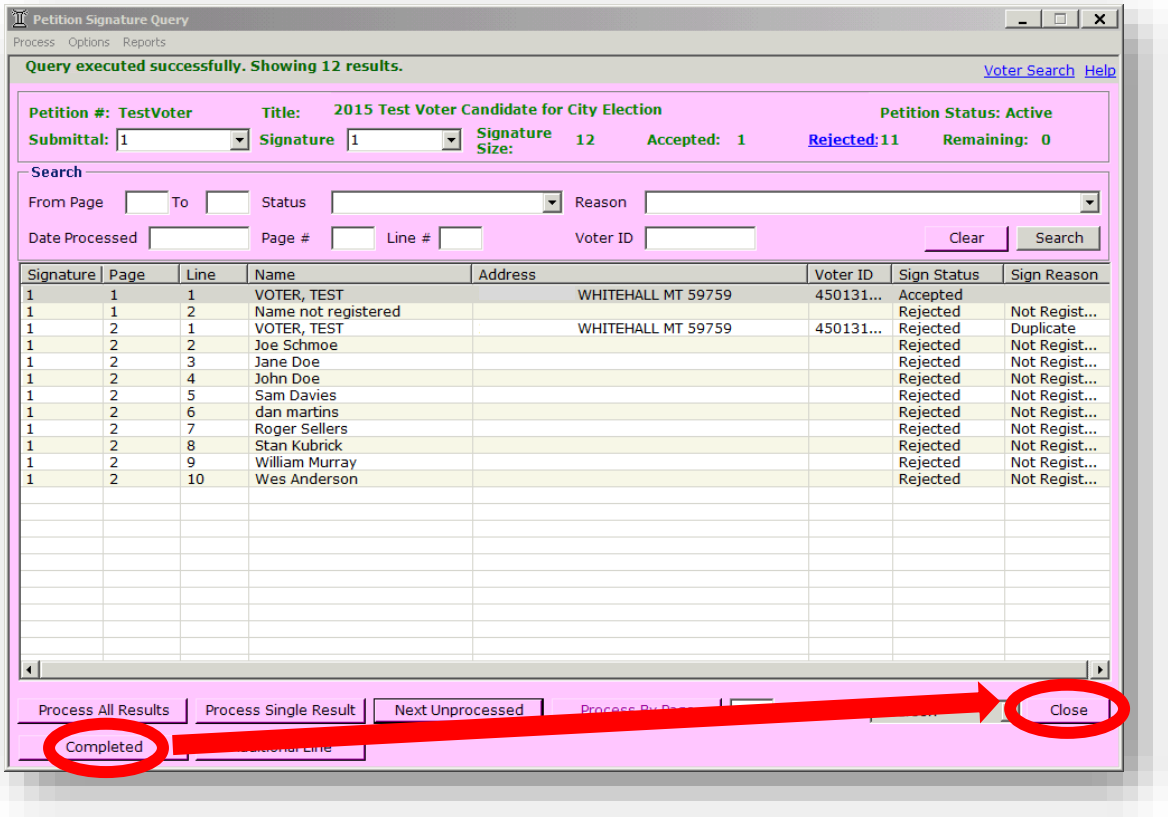
Processing Signatures

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.



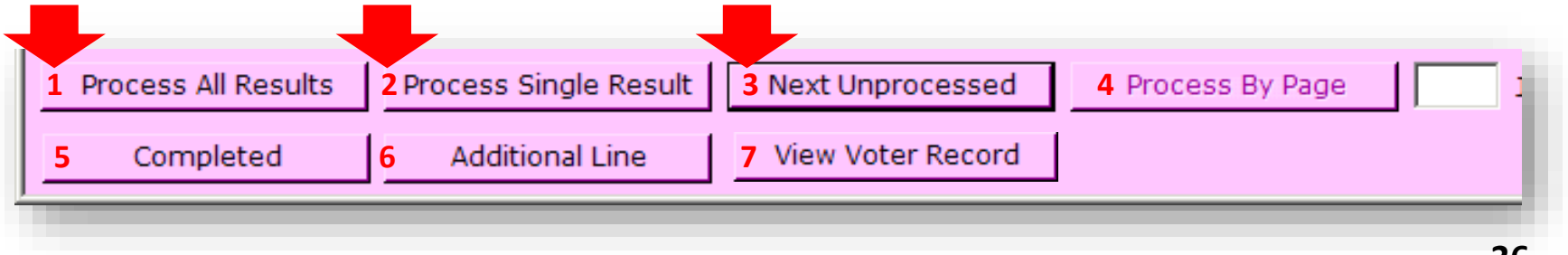
Processing Signatures

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

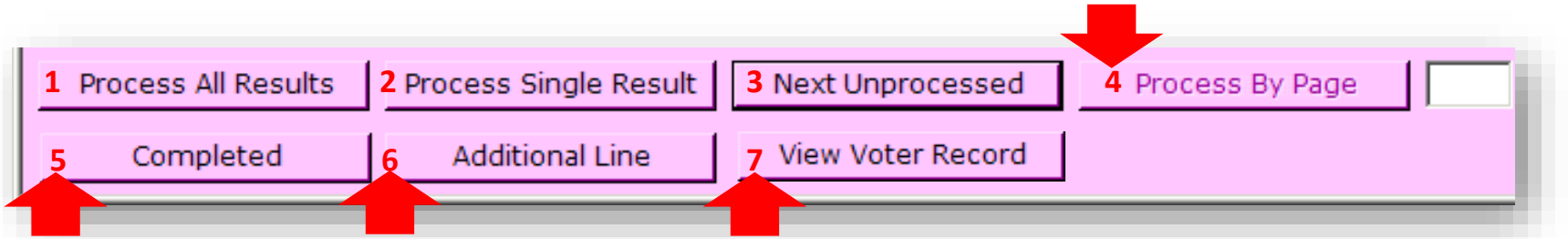
Review of Options on Petition Signature Query Screen

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.

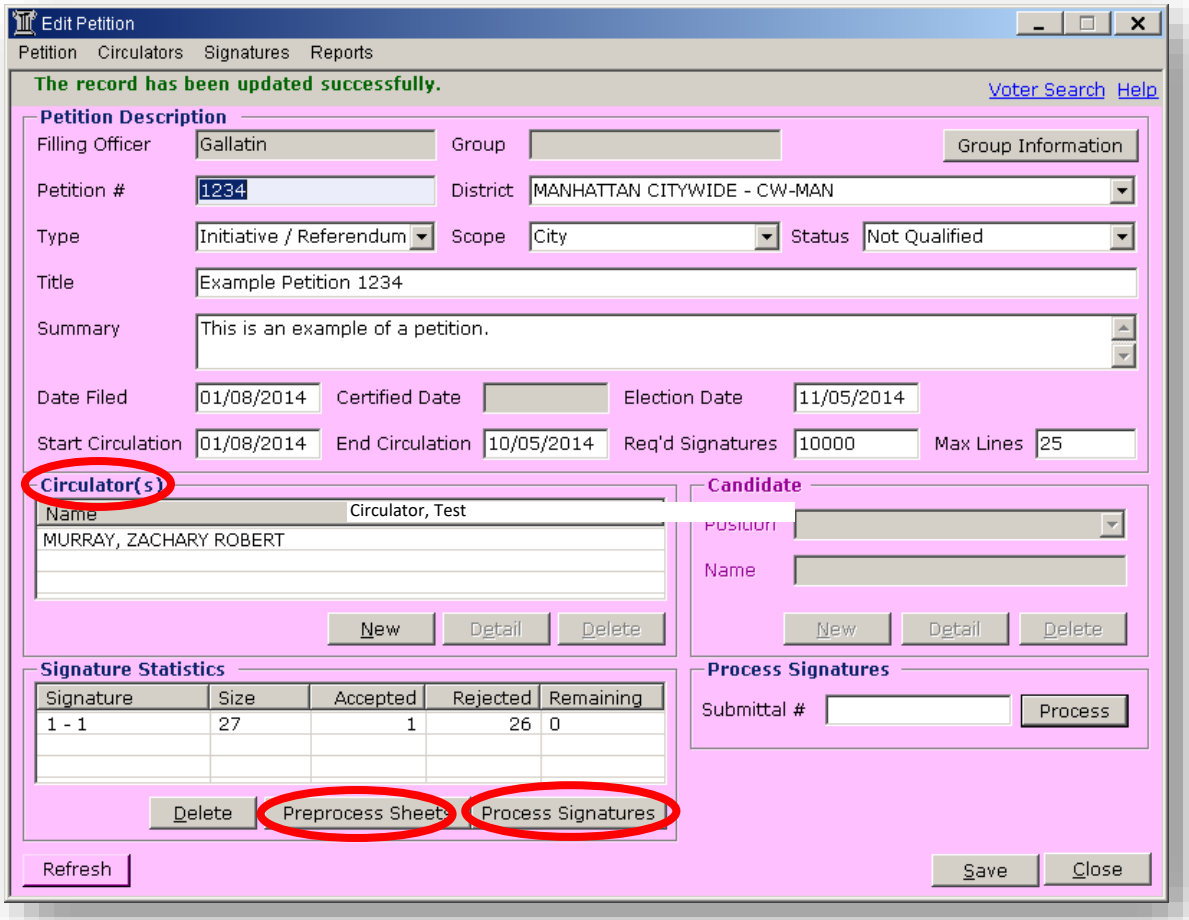
6) Additional Line: Allows you to add a line to a petition submittal.

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

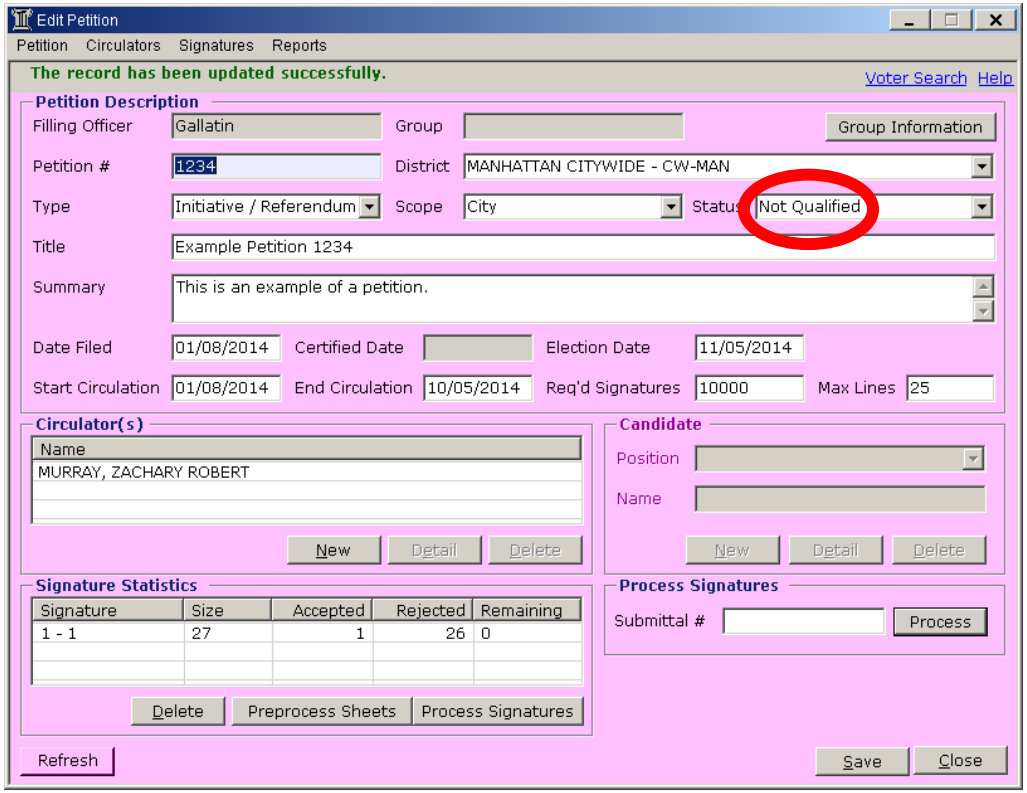
Before a petition can be closed, you will need to ensure all **circulators** are **entered**, all **sheets** have been **preprocessed** for every submittal, and all signatures have been **processed**.



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.)

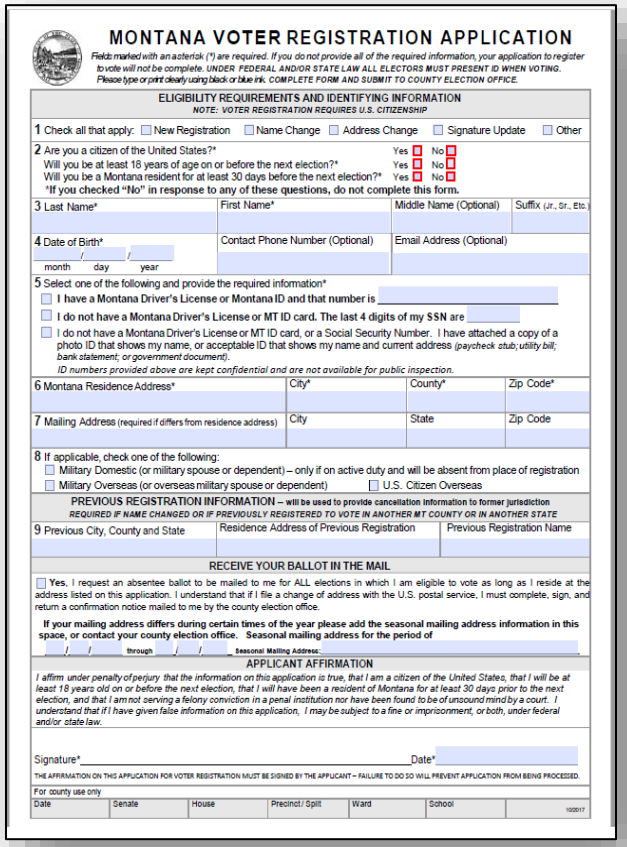


Processing Signatures

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 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 (Optional)	Suffix (Jr., Sr., Etc.)

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

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

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

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

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

PREVIOUS REGISTRATION INFORMATION – will be used to provide cancellation information to former jurisdiction

REQUIRED IF NAME CHANGED OR IF PREVIOUSLY REGISTERED TO VOTE IN ANOTHER MT COUNTY OR IN ANOTHER STATE

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

RECEIVE YOUR BALLOT IN THE MAIL

☐ Yes, I request an absentee ballot to be mailed to me for ALL elections in which I am eligible to vote as long as I reside at the address listed on this application. I understand that if I file a change of address with the U.S. postal service, I must complete, sign, and return a confirmation notice mailed to me by the county election office.

If your mailing address differs during certain times of the year please add the seasonal mailing address information in this space, or contact your county election office. Seasonal mailing address for the period of
__/__/__ through __/__/__ Seasonal Mailing Address: _____

APPLICANT AFFIRMATION

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

Signature* _____ Date* _____

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

For county use only

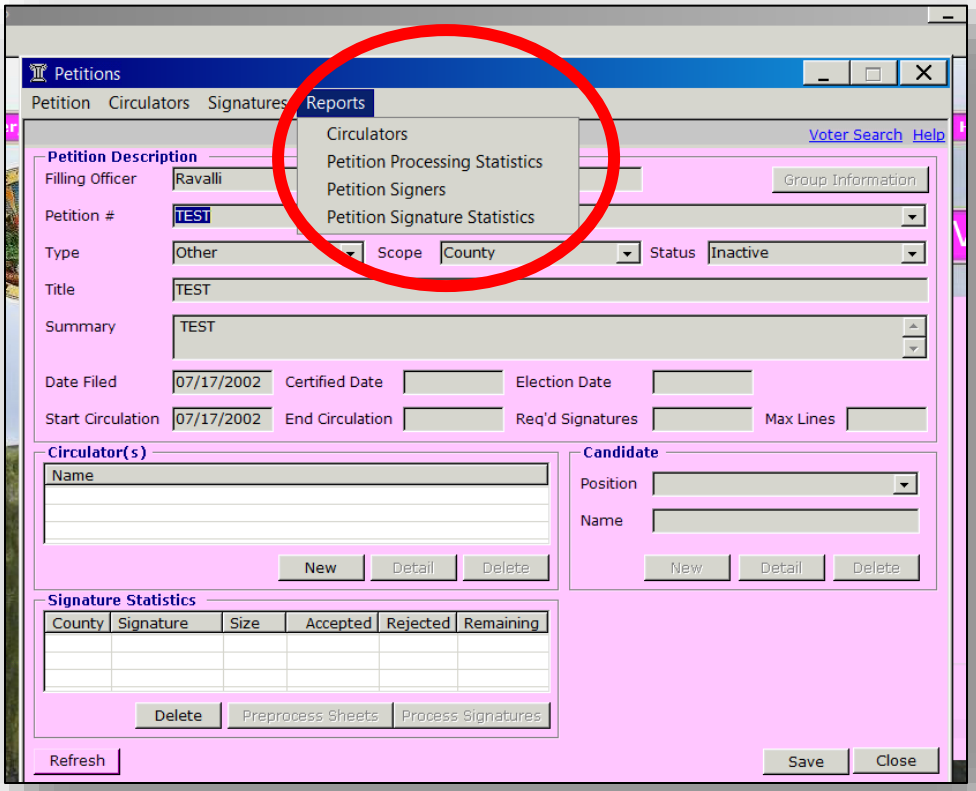
Date	Senate	House	Precinct / Split	Ward	School	100017

Petition Reports

CHRISTI JACOBSEN
MONTANA SECRETARY OF STATE

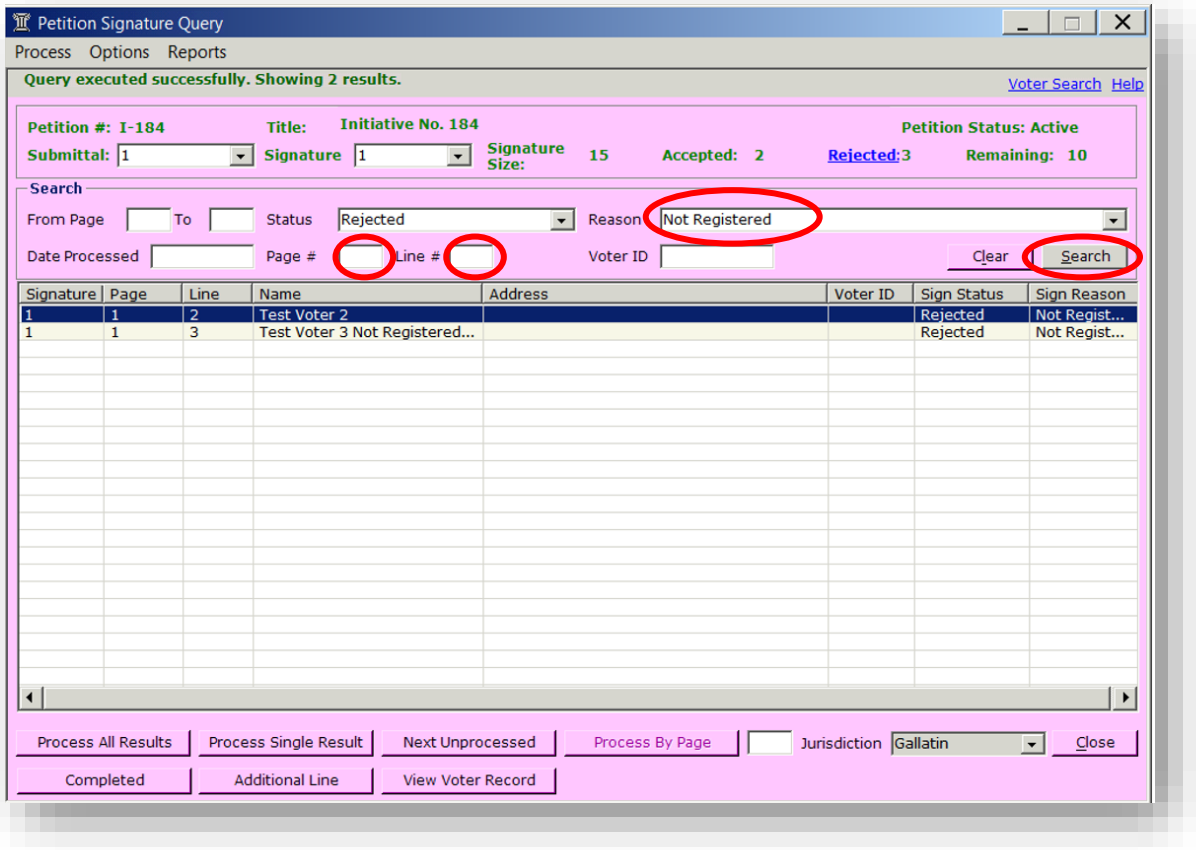
At any time there are several reports that you can run from various locations within the Petitions Module.

See Appendix B for these reports.



Petition Reports

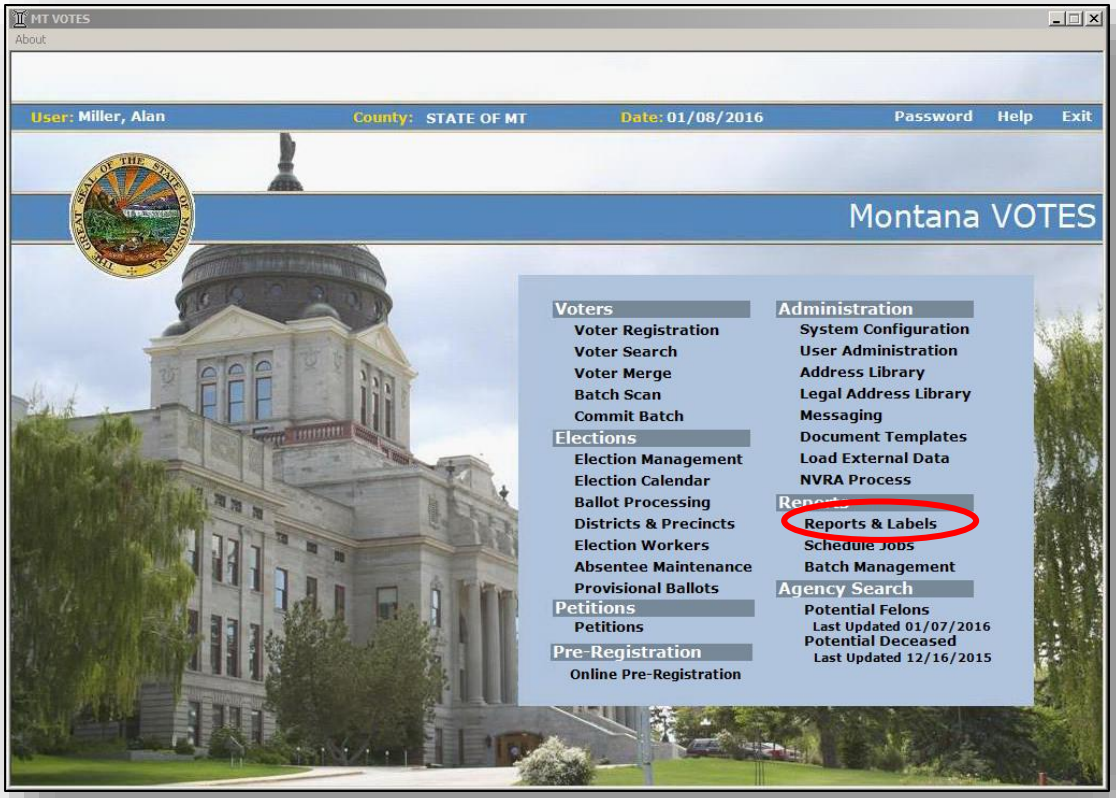
Searches can also be run from the **Petition Signature Query** screen, including a search for all signatures accepted, signatures rejected by reason, and you can search by page # and line # as well.



Petition Reports

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

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



Petition Reports

Once in the Reports module

1st – Click **Petitions**

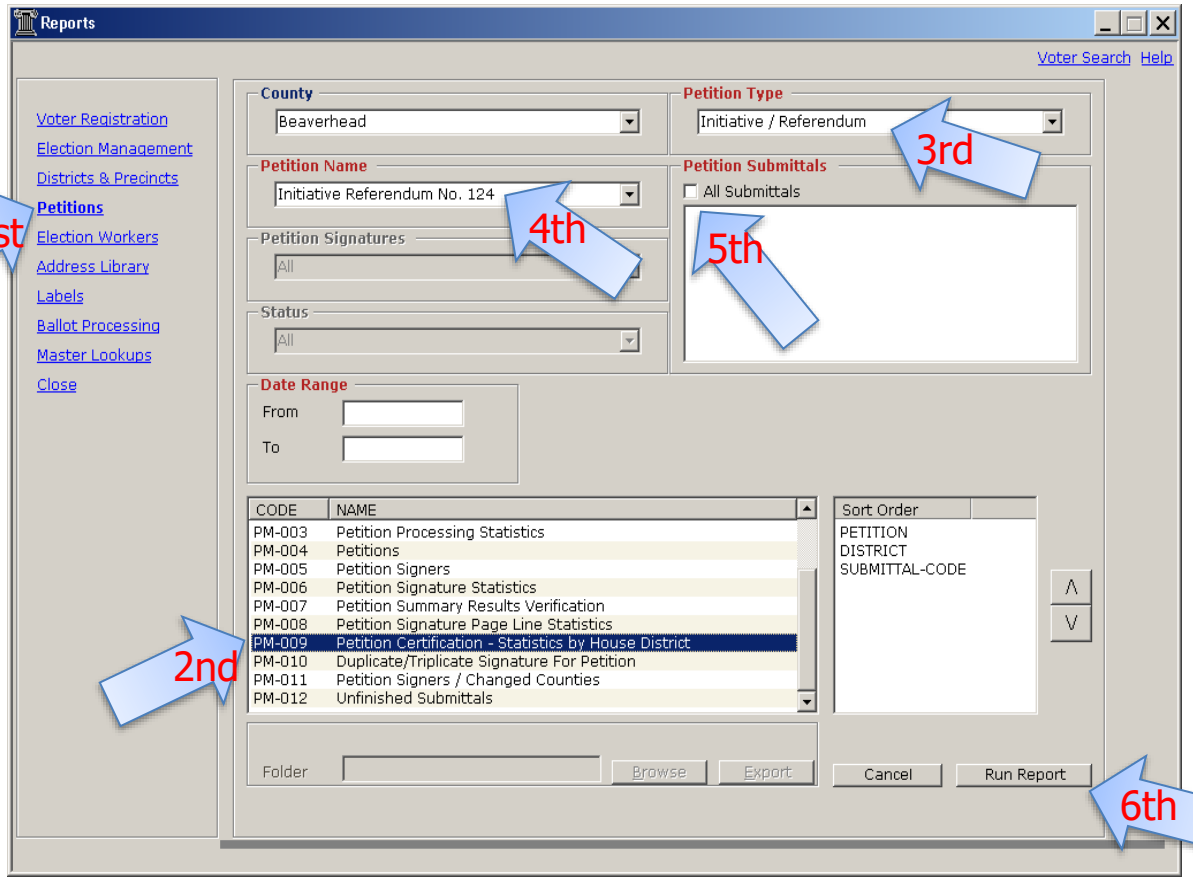
2nd – Select **PM-009**

3rd – Select **Petition Type**

4th – Select **Petition Name**

5th – Choose the **Petition Submittal(s)** you wish to certify

6th – Click **Run Report**

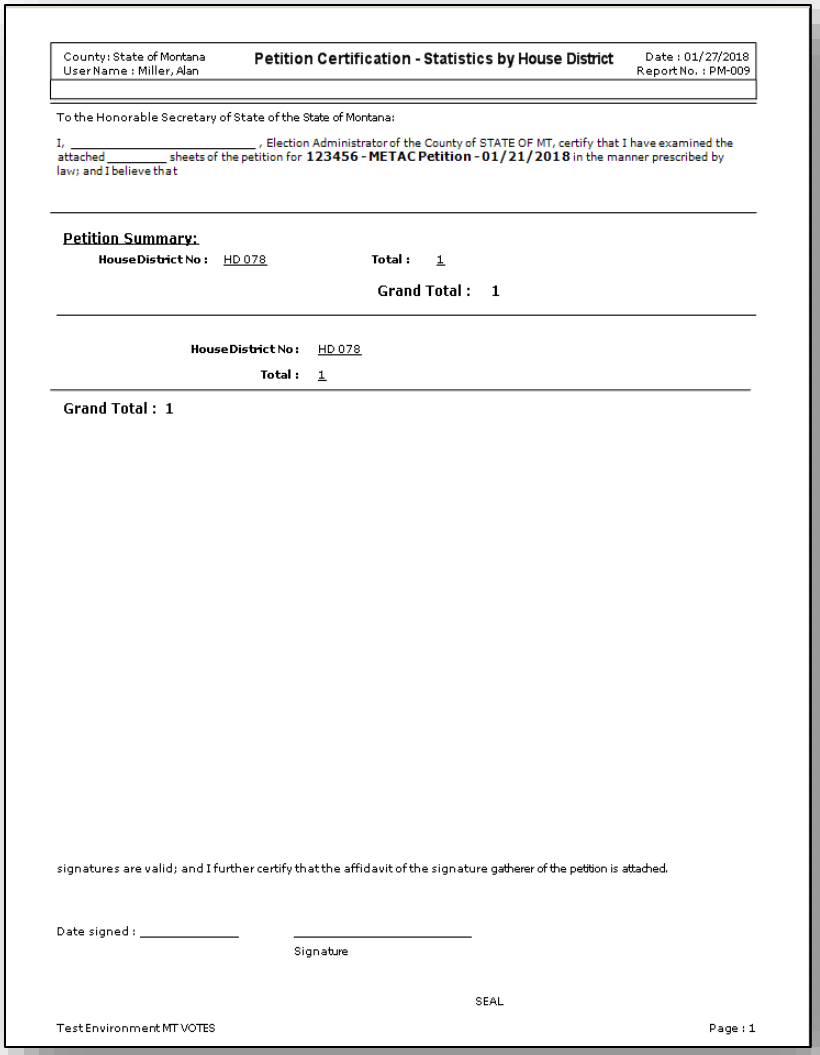


Petition Reports

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
User Name : Miller, Alan

Petition Certification - Statistics by House District

Date : 01/27/2018
Report No. : PM-009

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

I, _____, Election Administrator of the County of STATE OF MT, certify that I have examined the attached _____ sheets of the petition for **123456 - METAC Petition - 01/21/2018** in the manner prescribed by law; and I believe that

Petition Summary:

House District No : HD 078 **Total :** 1

Grand Total : 1

House District No : HD 078
Total : 1

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

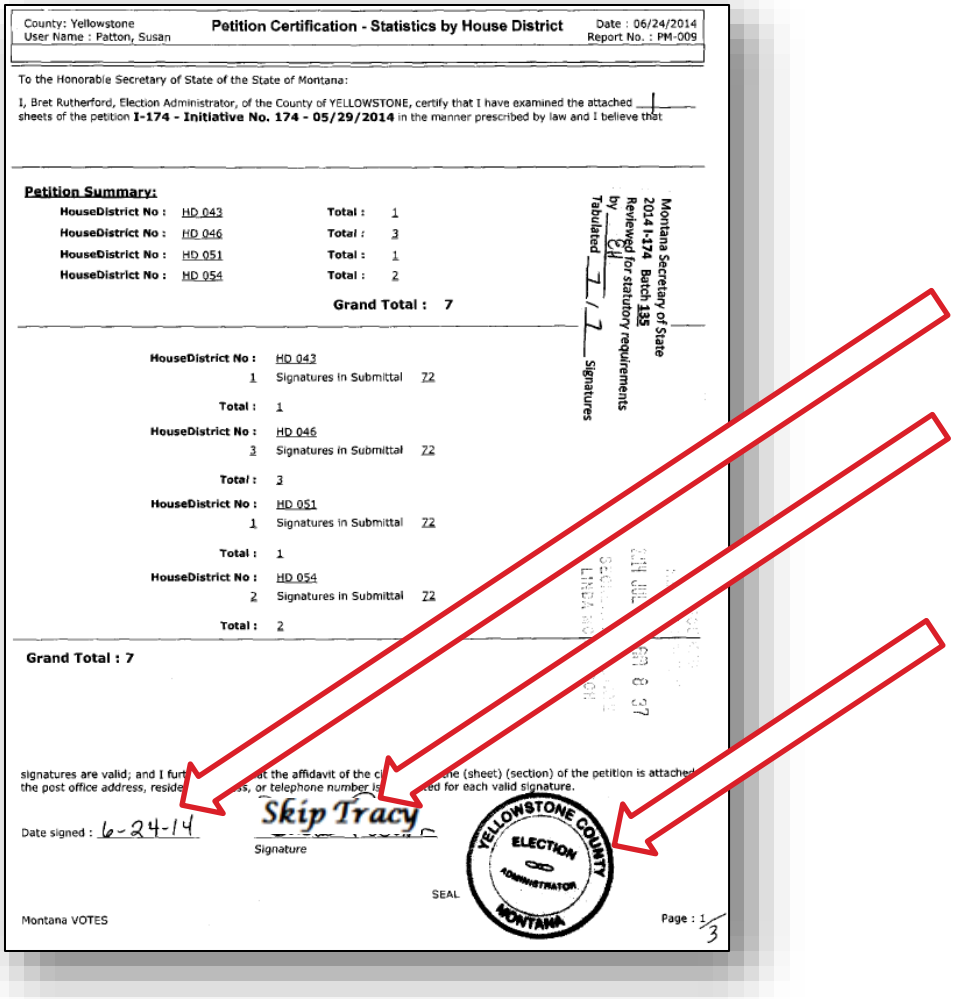
The question often arises about whether to provide **one PM-009 for multiple submittals**, or to provide a **separate PM-009 report for each submittal**.

- 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.

PM-009 Petition Certification Reports



County: Yellowstone
User Name : Patton, Susan

Petition Certification - Statistics by House District

Date : 06/24/2014
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 :	HD 043	**Total :**	1
HouseDistrict No :	HD 046	**Total :**	3
HouseDistrict No :	HD 051	**Total :**	1
HouseDistrict No :	HD 054	**Total :**	2

Grand Total : 7

Montana Secretary of State
2014 I-174 Batch 135
Reviewed for statutory requirements
by EH
Tabulated 7 / 7 Signatures

HouseDistrict No :	HD 043	
1	Signatures in Submittal	72
Total :	1	
HouseDistrict No :	HD 046	
3	Signatures in Submittal	72
Total :	3	
HouseDistrict No :	HD 051	
1	Signatures in Submittal	72
Total :	1	
HouseDistrict No :	HD 054	
2	Signatures in Submittal	72
Total :	2	

Grand Total : 7

signatures are valid; and I fur… at the affidavit of the c… …ne (sheet) (section) of the petition is attached… the post office address, reside… …ss, or telephone number is… …ed for each valid signature.

Date signed : 6-24-14

Skip Tracy
Signature

SEAL

YELLOWSTONE COUNTY ELECTION ADMINISTRATOR MONTANA

Montana VOTES

Page : 1/3

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

CHRISTI JACOBSEN
MONTANA SECRETARY OF STATE

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

2. State law requires that for **statewide ballot issues**, circulators **cannot be paid per signature**. This only applies to statewide ballot issues, not local petitions or any candidate petitions; circulators do not need to be registered voters; and you are not responsible for policing these requirements.

3. Notarized **Affidavit of Signature Gatherer** or the new affidavit, **Unsworn Declaration of Signature Gatherer** must be completed for each submittal. A submittal can be **up to 25 petition sheets**. For example, if a signature gatherer provides 35 petition sheets, then they will have to have 2 affidavits attached. (1 affidavit for 25 pages and the second for the 10 remaining pages).

Petition Policy

4. If you are unsure of an answer to a **statewide petition policy question**, review the Petitions Processing Tips document in MT Votes SharePoint where you found this guide. It can also be found on the Election Official Resources page. Or, contact the Secretary of State's elections division at soselections@mt.gov or (406) 444-9608.

The address for mailing statewide petitions is:

Montana Secretary of State

Elections and Voter Services

PO Box 202801

Helena, MT 59620-2801

5. For a **local petition**, refer to 7-5-101 through 7-5-140, MCA and ask your city or county attorney for assistance. If they are unsure have them contact the Secretary of State's office at 406-444-9608.

Troubleshooting

CHRISTI JACOBSEN
MONTANA SECRETARY OF STATE

- If you are having trouble with getting your petitions processed by the applicable deadline(s), please contact us so that we can assist, since there is no option to extend the deadlines.
- Remember that **statewide** candidate and **political party** qualification petitions need to be processed and sent to the SOS office so that they are received by the SOS within one week of submission to your office.

Troubleshooting

CHRISTI JACOBSEN
MONTANA SECRETARY OF STATE

- If you accidentally create **more sheets** in a petition than you need, and you cannot delete the extra sheet(s), just process that sheet's lines as blank lines, rather than deleting the entire submittal.

- **Please feel free** to reach out to the SOS office with any questions. Also, consider reaching out to other county elections administrators for tips or best practices.

Appendix A

Sample Signatures Sheet

These are the explanations of the sample petition signature sheet for examples of signatures with issues from slide 29:

1. If the signature and other identifying information on the petition is illegible, the signature **cannot** be counted.

2. If the signer is not registered to vote in your county, the signature **cannot** be counted.

3. If, for example, the person signed their registration card with their full name, but signs the petition with initials and their last name, **count** it if the signature taken as a whole is sufficiently similar to the one on file.

Reviewing Signatures

4. If the signer does not provide an address nor a telephone number, then the signature **cannot** be counted.

5. If the signer has already signed the same petition (duplicate signature), the second signature **cannot** be counted. MT Votes will flag a duplicate.

6. If the signer provides a residence address but **not** the city or town, you can still **count** the signature unless there is another reason to reject it.

7. If the signer is registered in a different county than your county, the signature **cannot** be counted.

Reviewing Signatures

8. If the address or phone number provided by the signer does not match the one on file, but the signature matches and there is no other reason to disqualify the signature, you can still **count** the signature.

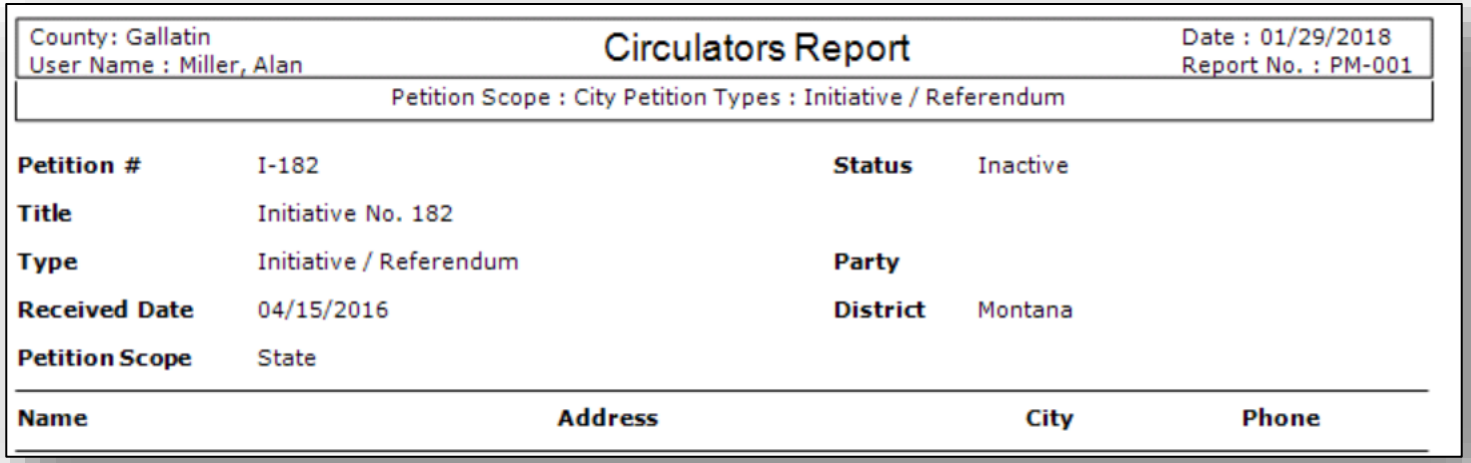
Other tips:

- **Check each** petition signature against the signature on file.
- You **do not** accept the signatures of **provisionally registered** electors, since they are not legally registered.
- You **accept** the signatures of **inactive** electors, since they are legally registered.
- You **do not** accept a petition signature if there is a major technical issue with the signature.
- **Accept** a petition signature even if, despite minor technical issues, you believe that the signature is genuine.

Appendix B - Reports

Petition Reports

The **Circulators Report,** also known as the **PM-001 Report**, displays all circulators entered for a petition.



County: Gallatin
User Name : Miller, Alan

Circulators Report

Date : 01/29/2018
Report No. : PM-001

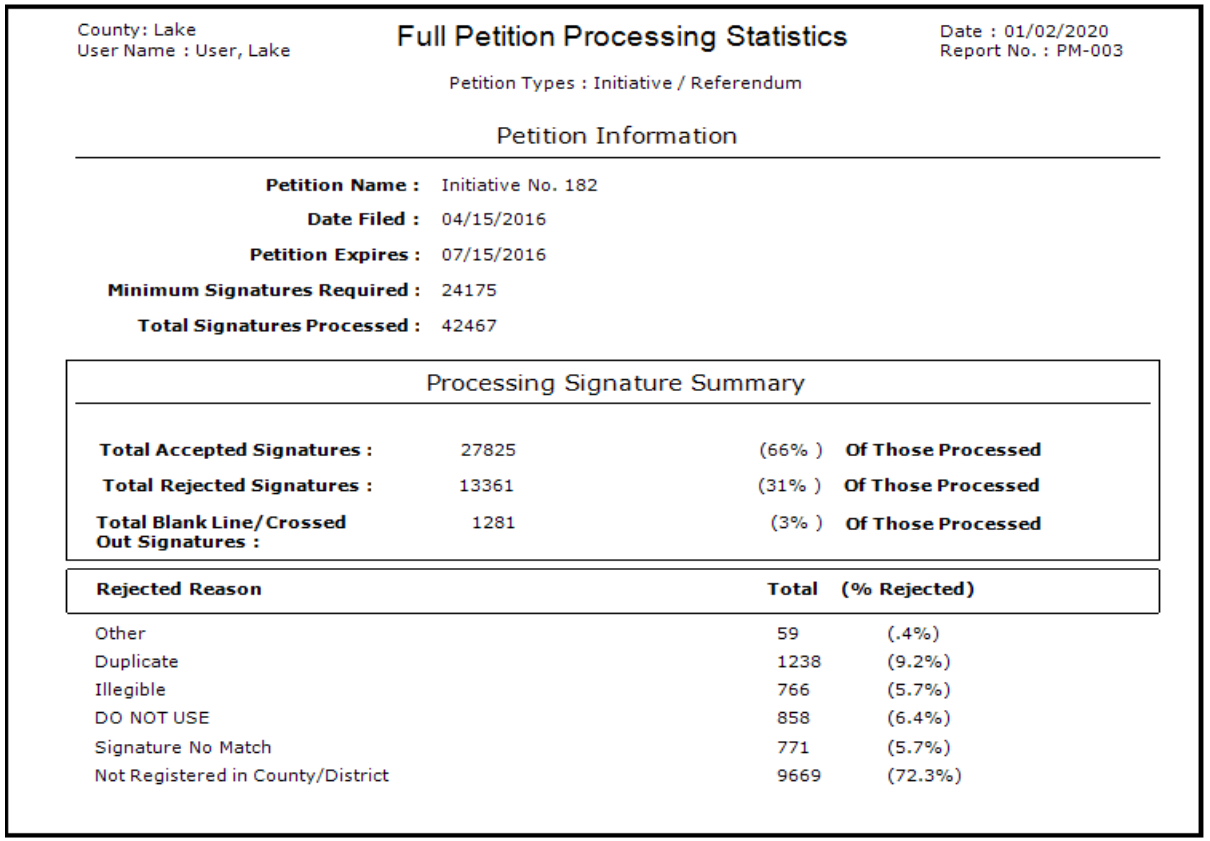
Petition Scope : City Petition Types : Initiative / Referendum

Petition #	I-182	**Status**	Inactive
Title	Initiative No. 182		
Type	Initiative / Referendum	**Party**	
Received Date	04/15/2016	**District**	Montana
Petition Scope	State		

Name	Address	City	Phone

Petition Reports

The **Petition Processing Statistics Report**, is the **PM-003 Report**. It shows the number of accepted and rejected signatures on the petition, and the reasons for the rejected signatures.



County: Lake
User Name : User, Lake

Full Petition Processing Statistics

Date : 01/02/2020
Report No. : PM-003

Petition Types : Initiative / Referendum

Petition Information

Petition Name :	Initiative No. 182
Date Filed :	04/15/2016
Petition Expires :	07/15/2016
Minimum Signatures Required :	24175
Total Signatures Processed :	42467

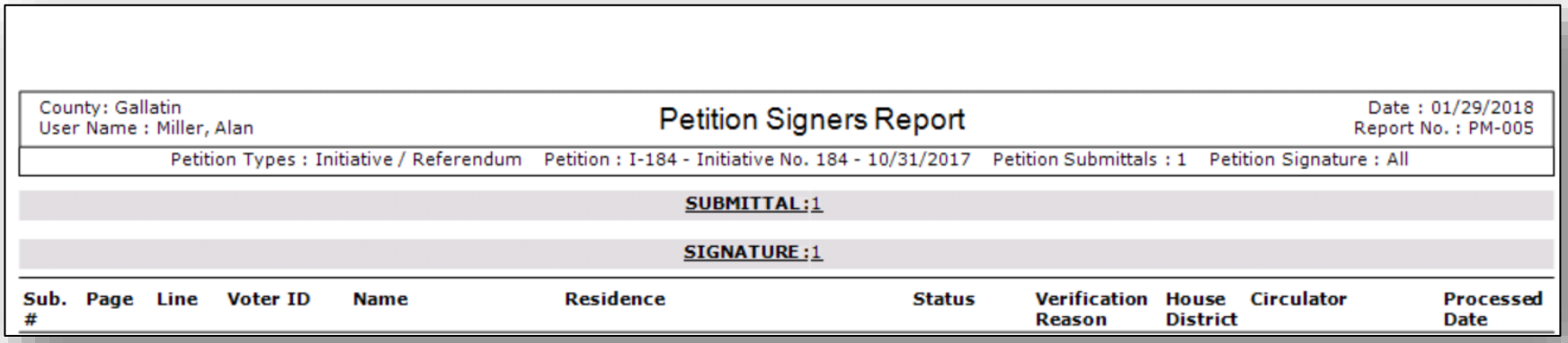
Processing Signature Summary

Total Accepted Signatures :	27825	(66%)	**Of Those Processed**
Total Rejected Signatures :	13361	(31%)	**Of Those Processed**
Total Blank Line/Crossed Out Signatures :	1281	(3%)	**Of Those Processed**

Rejected Reason	**Total**	**(% Rejected)**
Other	59	(.4%)
Duplicate	1238	(9.2%)
Illegible	766	(5.7%)
DO NOT USE	858	(6.4%)
Signature No Match	771	(5.7%)
Not Registered in County/District	9669	(72.3%)

Petition Reports

The **Petition Signers Report,** also known as the **PM-005 Report,** shows the names of all signers on the petition. It has been updated to included **Submittal #**, **Circulator**, and **Processed Date**.



County: Gallatin
User Name : Miller, Alan

Petition Signers Report

Date : 01/29/2018
Report No. : PM-005

Petition Types : Initiative / Referendum Petition : I-184 - Initiative No. 184 - 10/31/2017 Petition Submittals : 1 Petition Signature : All

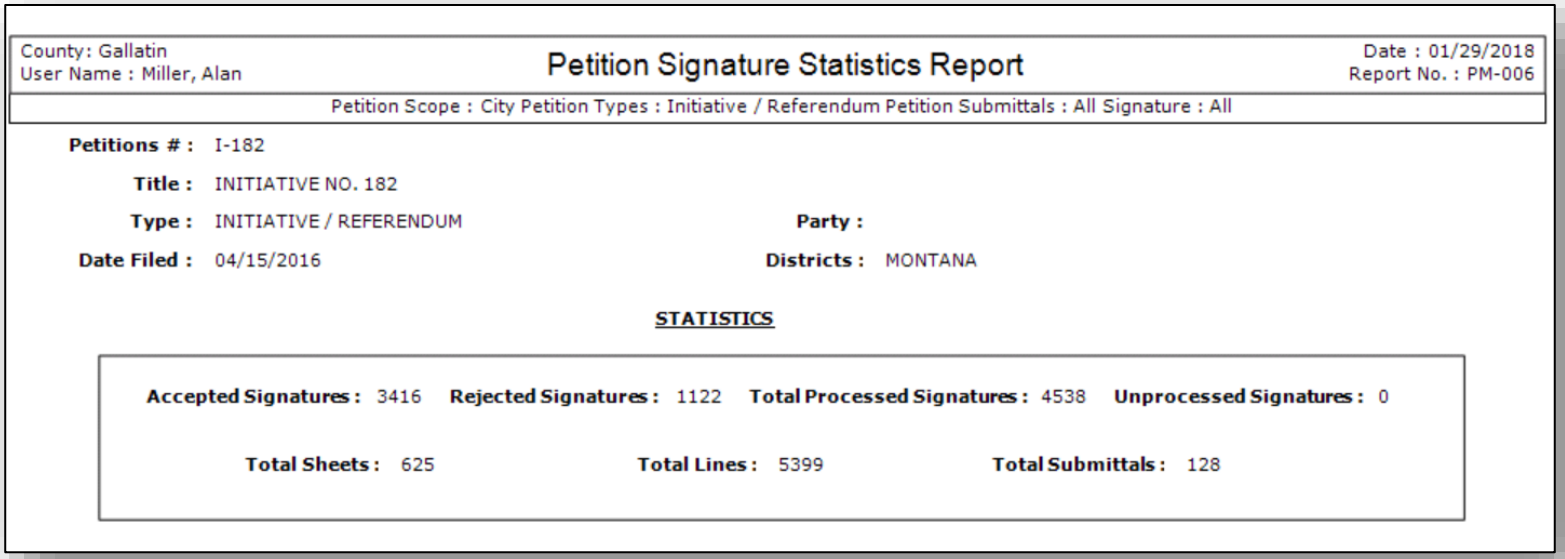
SUBMITTAL:1

SIGNATURE:1

Sub. #	Page	Line	Voter ID	Name	Residence	Status	Verification Reason	House District	Circulator	Processed Date

Petition Reports

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



County: Gallatin
User Name : Miller, Alan

Petition Signature Statistics Report

Date : 01/29/2018
Report No. : PM-006

Petition Scope : City Petition Types : Initiative / Referendum Petition Submittals : All Signature : All

Petitions # : I-182
Title : INITIATIVE NO. 182
Type : INITIATIVE / REFERENDUM
Party :
Date Filed : 04/15/2016
Districts : MONTANA

STATISTICS

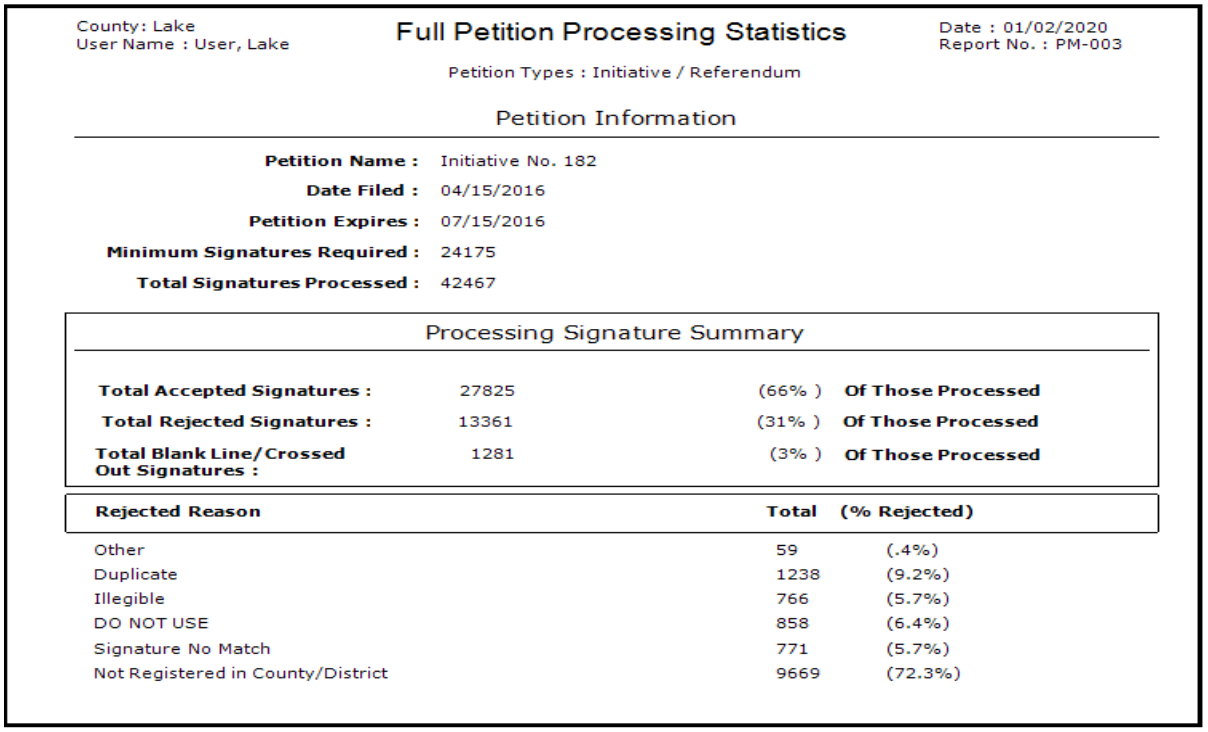
Accepted Signatures : 3416 **Rejected Signatures :** 1122 **Total Processed Signatures :** 4538 **Unprocessed Signatures :** 0

Total Sheets : 625 **Total Lines :** 5399 **Total Submittals :** 128

Petition Reports

Note: Please be careful about releasing **statewide** petition totals. Petition sponsors or opponents may think the totals are just for your county. Please refer people to the Secretary of State's office for **statewide** petition totals.

For local petitions, you may provide totals. PM-003 and PM-009 are useful reports for this purpose. Use a disclaimer if they **are not** final.



County: Lake
User Name : User, Lake

Full Petition Processing Statistics

Date : 01/02/2020
Report No. : PM-003

Petition Types : Initiative / Referendum

Petition Information

Petition Name :	Initiative No. 182
Date Filed :	04/15/2016
Petition Expires :	07/15/2016
Minimum Signatures Required :	24175
Total Signatures Processed :	42467

Processing Signature Summary

Total Accepted Signatures :	27825	(66%)	**Of Those Processed**
Total Rejected Signatures :	13361	(31%)	**Of Those Processed**
Total Blank Line/Crossed Out Signatures :	1281	(3%)	**Of Those Processed**

Rejected Reason	**Total**	**(% Rejected)**
Other	59	(.4%)
Duplicate	1238	(9.2%)
Illegible	766	(5.7%)
DO NOT USE	858	(6.4%)
Signature No Match	771	(5.7%)
Not Registered in County/District	9669	(72.3%)

Appendix C

Quick Reference: Petition Processing

Montana Secretary of State
sosmt.gov • soselections@mt.gov

1) For **detailed steps** on petition processing in MT Votes, go to MT Votes SharePoint. Find under Forms Files and Documents, MT Votes Training, then Petitions. For **Tips** on processing ballot issue and candidate petitions, visit the Election Officials Resource page. Scroll down and click on Petition Processing Tips and Quick Reference.

2) Check to make sure that **both the petition sheets and affidavit** are included in the documents submitted to your office. Make sure they are organized, and affidavits are complete before submitting.

3) **Provide a receipt** documenting how many pages were submitted.

4) If possible, **link the circulator** to a voter record in MT Votes; if the circulator is not registered to vote, enter the circulator's information manually.

5) **Check each signature**. A signature may be counted if the signature, taken as a whole, bears enough similarity to the signature on the registration form to provide reasonable certainty of its authenticity.

6) For statewide ballot issue petitions and statewide candidate or state district candidate petitions, certify the petitions using the **MT Votes PM-009 report**. Make copies for your records. Using paper or binder clips, attach the signed original certification report to the original affidavit and original signed petition(s), then mail to the SOS by certified mail to PO Box 202801, Helena, MT 59620-2801 so that they are received by the deadline.

7) Call **406-444-9608 or email soselections@mt.gov** if you have questions about statewide ballot issue petitions or statewide candidate or state district candidate petitions.

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

Updated January 2020