



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

Sample of a completed Unsworn Declaration affidavit.

 **Affidavit of Petition Signature Gatherer**

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

AFFIDAVIT FILED WITH ELECTION ADMINISTRATOR

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

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

Date on which the first signature **attached** was gathered

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

Signature of petition signature gatherer

Address of petition signature gatherer

City, state and zip code

NOTARY OR AUTHORIZED OFFICER – DO NOT FILL OUT THIS SECTION UNTIL AFTER THE SIGNATURES GATHERED HAVE BEEN ATTACHED TO THIS AFFIDAVIT

State of Montana
County of _____

Signed and sworn to before me this _____ day of _____, 20____ by _____
Printed Name of Signature Gatherer

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

Signature of Notary or Public Official

[SEAL/STAMP]

Updated July 25, 2019

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

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

AFFIDAVIT FILED WITH ELECTION ADMINISTRATOR

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

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

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

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

Daffy Duck
Signature of petition signature gatherer

123 Lakeview Blvd
Address of petition signature gatherer

Helena MT 59602
City, state and zip code

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

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

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

Dated on this 1st day of April, 2020 by
DAFFY DUCK
Printed Name of Signature Gatherer

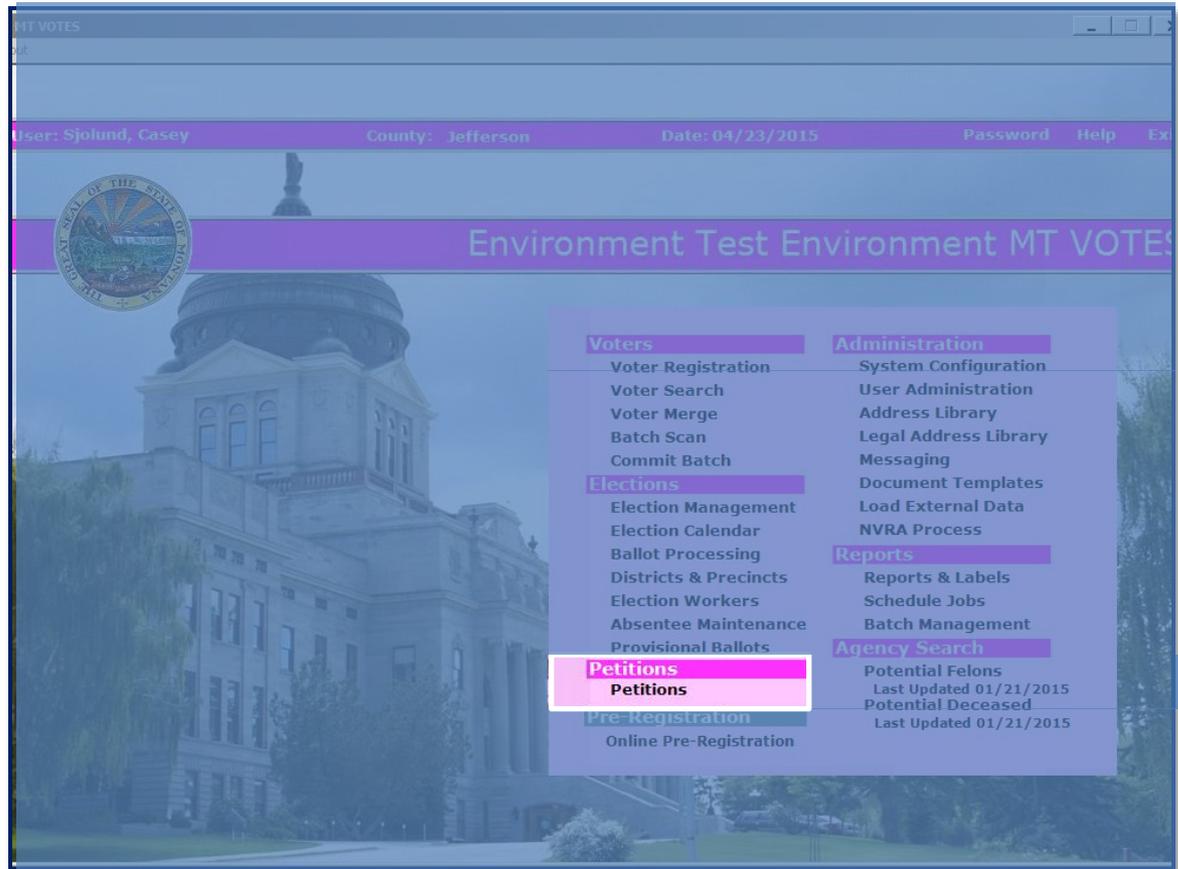
Daffy Duck
Signature

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”**.

Petitions

Query executed successfully. [Voter Search](#) [Help](#)

Search

Petition # Status **Active**

Title

District Types District

Search Results

Petition Number	Title	Petition Type	District (District Type)
I-177	Initiative No. 177	Initiative / Refe...	Montana (STATEWIDE)
CI-115	Constitutional Initiative No. 115	Initiative / Refe...	Montana (STATEWIDE)
CI-116	Constitutional Initiative No. 116	Initiative / Refe...	Montana (STATEWIDE)
GLACIER 2015-...	TREASURER RECALL PETITION	Recall	Glacier (COUNTYWIDE)
I-178	Initiative No. 178	Initiative / Refe...	Montana (STATEWIDE)
Bernie Sanders...	Bernie Sanders for President 2016	Candidate	Montana (STATEWIDE)
Donald Trump ...	Donald Trump for President 2016	Candidate	Montana (STATEWIDE)
Hillary Clinton ...	Hillary Clinton for President 2016	Candidate	Montana (STATEWIDE)
Ben Carson 20...	Ben Carson for President 2016	Candidate	Montana (STATEWIDE)
Marco Rubio 20...	Marco Rubio for President 2016	Candidate	Montana (STATEWIDE)
Ted Cruz 2016	Ted Cruz for President 2016	Candidate	Montana (STATEWIDE)
Jeb Bush 2016	Jeb Bush for President 2016	Candidate	Montana (STATEWIDE)
Chris Christie 2...	Chris Christie for President 2016	Candidate	Montana (STATEWIDE)
Carly Fiorina 2...	Carly Fiorina for President 2016	Candidate	Montana (STATEWIDE)
Rand Paul 2016	Rand Paul for President 2016	Candidate	Montana (STATEWIDE)
I-179	Initiative No. 179	Initiative / Refe...	Montana (STATEWIDE)

Creating Petitions

Example of filled fields:

Scope - choose correct political subdivision.

- Fill in all the petition fields information.

- Leave **Max Lines** field blank.

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

Petitions
Petition Circulators Signatures Reports

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

Petition Description

Filling Officer: Gallatin Group: [Group Information](#)

Petition #: 1234 District: MANHATTAN CITYWIDE - CW-MAN

Type: Initiative / Referendum Scope: **City** Status: Active

Title: Example Petition 1234

Summary: This is an example of a petition.

Date Filed: 01/08/2014 Certified Date: Election Date: 11/05/2014

Start Circulation: 01/08/2014 End Circulation: 10/05/2014 Req'd Signatures: 10000 Max Lines:

Circulator(s)

Name:

Candidate

Position:

Name:

Signature Statistics

County	Signature	Size	Accepted	Rejected	Remaining
<input type="text"/>					

Process Signatures

Submittal #:

Circulators

Circulators are
Signature Gatherers

Petitions Screen:

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

- Click **Detail**.



CHRISTI JACOBSEN
MONTANA SECRETARY OF STATE

The screenshot shows the 'Petitions' application window. At the top, it says 'Query executed successfully.' Below that is a search form with fields for 'Petition #', 'Status' (set to 'Active'), 'Title', and 'District Types'. A 'Search' button is visible. Below the search form is a table of search results with columns: 'Petition Number', 'Title', 'Petition Type', and 'District (District Type)'. The row for 'I-179 Initiative No. 179 Initiative / Refe... Montana (STATEWIDE)' is highlighted in blue and circled in red. At the bottom of the window, there are buttons for 'New', 'Detail', 'Delete', 'Preprocess Sheets', 'Process Signatures', and 'Close'. The 'Detail' button is also circled in red.

Petition Number	Title	Petition Type	District (District Type)
I-177	Initiative No. 177	Initiative / Refe...	Montana (STATEWIDE)
CI-115	Constitutional Initiative No. 115	Initiative / Refe...	Montana (STATEWIDE)
CI-116	Constitutional Initiative No. 116	Initiative / Refe...	Montana (STATEWIDE)
GLACIER 2015-...	TREASURER RECALL PETITION	Recall	Glacier (COUNTYWIDE)
I-178	Initiative No. 178	Initiative / Refe...	Montana (STATEWIDE)
Bernie Sanders...	Bernie Sanders for President 2016	Candidate	Montana (STATEWIDE)
Donald Trump ...	Donald Trump for President 2016	Candidate	Montana (STATEWIDE)
Hillary Clinton ...	Hillary Clinton for President 2016	Candidate	Montana (STATEWIDE)
Ben Carson 20...	Ben Carson for President 2016	Candidate	Montana (STATEWIDE)
Marco Rubio 20...	Marco Rubio for President 2016	Candidate	Montana (STATEWIDE)
Ted Cruz 2016	Ted Cruz for President 2016	Candidate	Montana (STATEWIDE)
Jeb Bush 2016	Jeb Bush for President 2016	Candidate	Montana (STATEWIDE)
Chris Christie 2...	Chris Christie for President 2016	Candidate	Montana (STATEWIDE)
Carly Fiorina 2...	Carly Fiorina for President 2016	Candidate	Montana (STATEWIDE)
Rand Paul 2016	Rand Paul for President 2016	Candidate	Montana (STATEWIDE)
I-179	Initiative No. 179	Initiative / Refe...	Montana (STATEWIDE)

Circulators

Ensure that you are in the right **petition**.

Is the circulator in the **Circulator(s)** area?

If not, then add them by clicking the **New** button in the Circulator(s) box.

The screenshot shows the 'Petitions' application window. The 'Petition Description' section 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 contains a table with one entry: BILLI, CHET A. Below this table is a 'New' button, which is circled in red. Other sections include 'Candidate' and 'Process Signatures'. The 'Signature Statistics' table is empty.

Signature	Size	Accepted	Rejected	Remaining

Circulators

New Circulator:

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

It automatically fills or brings up a list of individuals with that name. (If the circulator is not registered, see the next slide.)

Click **Save** then **Close** if found here.

The screenshot shows the 'Circulators' application window. The 'General Information' section contains the following fields: Petition # (TestVoter), Voter ID (450131639), Last Name (VOTER), First Name (TEST), Name Suffix, Effective Date, Middle Name, and Expiration Date. The 'Link to Voter' button is circled in red. The 'Contact Information' section has tabs for 'Address' and 'Contact'. The 'Address' tab is active, showing a table with columns 'Address Type', 'Address', and 'Last Updated'. The table contains one row for 'Residence' with the address 'WHITEHALL, MT 59759' and the date '06/10/2015'. A 'Detail' button is located below the table. The 'List of Circulators' section is a 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, there are buttons for 'New', 'Save', 'Delete', 'Preprocess Sheets', and 'Close'. The 'Save' and 'Close' buttons are circled in red.

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

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

Circulators

If the circulator is **not a registered voter**, or not registered in your county (circulators are **not** required to be registered), then a **search** dialogue box will display.

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

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

The screenshot shows a web application window titled "Petitions". At the top, a green message states "No matching results found. (0 Results)", which is circled in red. Below this is a search form with three tabs: "General", "Residential Address", and "Mailing Address". The "General" tab is active, showing 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". A "Scope" section has radio buttons for "State" and "County", with "County" selected and a dropdown menu showing "Gallatin". "Search" and "Clear" buttons are to the right. Below the form is a "Search Results" table with columns for "Voter ID", "Name", "Residential Address", "Status", and "Date of Birth". The table is currently empty. At the bottom, there are "View Summary", "Select", and "Close" buttons.

Voter ID	Name	Residential Address	Status	Date of Birth

Circulators

If you determine that the circulator is not registered to vote, input the circulator's information in the Name section and by clicking on the **Detail** button in the **Contact Information** section for address and contact information.

The screenshot shows the 'Circulators' application window. The 'Contact Information' section is highlighted with a red circle, and the 'Detail' button is also circled in red. The 'List of Circulators' table is visible below.

General Information

Petition # Voter ID

Last Name First Name Middle Name

Name Suffix Effective Date Expiration Date

Contact Information

Address | Contact

Address Type	Address	Last Updated
Mailing		
Resent Addr...		
Residence		
Work Address		

List of Circulators

Last Name	First Name	Middle Name	Voter ID	Effective Date	Expiration Date
LEWIS	DAVID				
SMITH	CLYDE				
MILLER	DANIEL	G			
SAUERS	CAMILLE				
PHELPS	MICHAEL				
BRAUN	DONNA				
BRYANT	VALERIE	L			
SMITH	KATIE	I			

Circulators

Contact Detail

Enter the circulator's address and contact info.

Click **Update** to store and then **Close**.

Click **Save** on the Circulators screen to save the record.

Note: **Close** here or **Close** on the found Circulator page takes you back to the Circulators screen.

The screenshot shows a window titled "Contact Detail" with a blue title bar. In the top right corner, there are links for "Voter Search" and "Help". The window has two tabs: "Address" (selected) and "Contact". The form contains the following fields:

- Type: Mailing
- Address: Test Address
- City/St/Zip: Three input fields with a dropdown arrow between the second and third.
- Receive Correspondence: An unchecked checkbox.
- Buttons: Update, Delete, and Clear.

Below the form is a table with three columns: Address Type, Address, and Last Updated.

Address Type	Address	Last Updated
Mailing		
Residence		
Work Address		

At the bottom right of the window, there is a "Close" button. Both the "Update" button and the "Close" button are circled in red.

Petition Preprocessing



CHRISTI JACOBSEN
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.

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

- Petition Description:** Filing Officer: Jefferson; Group: [empty]; 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: [empty]; Election Date: 09/01/2015; Start Circulation: 06/10/2015; End Circulation: 07/01/2015; Req'd Signatures: 10; Max Lines: [empty].
- Circulator(s):** Name: VOTER, TEST; Buttons: New, Detail, Delete.
- Candidate:** Position: [empty]; Name: [empty]; Buttons: New, Detail, Delete.
- Signature Statistics:** Table with columns: Signature, Size, Accepted, Rejected, Remaining.
- Process Signatures:** Submittal #: [empty]; Button: Process.
- Buttons:** Delete, Preprocess Sheets (circled in red), Process Signatures, Refresh, Save, Close.

Petition Preprocessing

Petition sheet formatted with 10 signature lines.

You will need to look through **all pages** of the Submittal to determine the sheet with the most good lines. (“last good line” means the number associated with the last signature line that has been written in, even if certain signature lines are **later rejected**).

Example, if there are 2 pages, one in which the last good line is **8**, and the second in which the last good line is **10**, then the **Last Good Line** entered would be **10**, as in this sample page.

Sample
Petition
Sheet

	Signature	Signed	
1.	Chant	3/9/12	13 Bozeman Trail Rd
2.	Lynsay	3/11/12	517 Jay Ln Belgrade
3.	Amanda J. Jones	3/9/12	8N. 24th Ave Unit C Boz
4.	Andrew Michael Rea	3/9/12	11200 N. Ardmore
5.	Clara Scaler	3/9/12	399 God-frey Ave
6.			
7.		3/14/12	24 Brahma
8.	Tracy Vinner	1/10/12	100 THE HILL WILKINSON MT 59741
9.	Mark S. Davis	3/10/12	3650 MAGENTA BOZEMAN MT 59718
10.	Sue Swin	3/17/12	210 W Mendon Boz MT

Callatin

tures of registered voters qualify. 2. Collect voters' signatures from only one county per sheet. 3. Check potential signer the initiative text and explanation statements printed on the petition. 5. Sign, notarize p to 25 petition sheets from the same county can be attached to one affidavit). 6. You must have ures dated after the date the affidavit is notarized. 8. Don't fill in the legislative

Petition Preprocessing

If there are lines 1-10 on the front of the sheet and no lines on the reverse, process it as **one sheet** in MT Votes, with **Last Good Line** quantity of 10.

Similarly, if there are lines 1-10 on the front of the sheet and 11-20 on the reverse side of the sheet, this should be processed as **one sheet** in MT Votes with **Last Good Line** quantity of 20.

Click **Save** once you have entered the **Last Good Line** quantity in the **Receive Bulk Sheets** area.

Sample Petition Sheet

Signature	Signed			
1. <i>Chant</i>	9/12	13	Bozeman Trail Rd	
2. <i>Lynsay</i>	11/12		517 Jay Ln Belgrade	
3. <i>Shanice J. Jones</i>	3/9/12	8N.24th Ave Unit C Boz		
4. <i>Ludovick Walker</i>	3/9/12	415 S. Kent Dr Helena	1721 W. Anderson	
5. <i>Cindy Scatch</i>	3/9/12	399 Godfrey Ave		
6. <i>[Signature]</i>				
7. <i>[Signature]</i>	3/14/12	24 Brahma		
8. <i>Daisy V. Jones</i>	1/01/12	700 THE H Land Whitton, MT 59741		
9. <i>Mark S. Davis</i>	3/10/12	3650 MAGENTA BOZEMAN 59718		
10. <i>Dale Swin</i>	3/12/12	610 W Mendocino Boz MT		
		Gallatin		

atures of registered voters qualify. 2. Collect voters' signatures from only one county per sheet. 3. Check potential signer the initiative text and explanation statements printed on the petition. 5. Sign, notarize p to 25 petition sheets from the same county can be attached to one affidavit). 6. You must have ures dated after the date the affidavit is notarized. 8. Don't fill in the legislative

Petition Preprocessing

Sheet Information

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

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

Preprocess Sheets

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

Petition Summary

Petition #: TestVoter **Title:** 2015 Test Voter Candidate for City Electn...

County: Jefferson **Submittal:** 1 **Auto Assign:** **Current Submittals:** 0

Circulator: VOTER, TEST

Receive Bulk Sheets

Accepted Sheet: 2 **Receive Sheets:** **Last Good Line:** **Save**

Sheet Information

Max Lines: **Approval Date:** 06/10/2015 **GOTO:** **Save & Next** **Save**

Page #: 1 **Last Good Line:** 10 **GOTO:** **Save**

Line	Code	Description
1	1	Good
2	1	Good
3	1	Good
4	1	Good
5	1	Good
6	1	Good
7	1	Good
8	1	Good
9	1	Good
10	1	Good

Code	Description
1	Good
2	Crossed out
3	Blank
4	No signature

Label **Complete** **Clear** **Close**

Petition Preprocessing

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

Line 3 was **Crossed out**, lines 4-6 **No Signature**, lines 7-10 were **Blank**.

Move to the next page by clicking **Save & Next**.

On the last page, click only on **Save**, because clicking **Save & Next** adds pages to the submittal.

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 #: 1 Last Good Line: 10 GOTO: Save & Next Save

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	3	Blank		
8	3	Blank		
9	3	Blank		
10	3	Blank		

Label Complete Clear Close

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.

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 & Next Save

Line	Code	Description
1	1	Good
2	3	Blank
3	3	Blank
4	3	Blank
5	3	Blank
6	3	Blank
7	3	Blank
8	3	Blank
9	3	Blank
10	1	Good

Code	Description
1	Good
2	Crossed out
3	Blank
4	No signature

Label Complete Clear Close

Petition Preprocessing

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

(If you choose not to print labels, be sure to **manually number the petition affidavits** with the applicable submittal number.)

Printing labels will allow you to use your handheld barcode scanner to enter the submittal number instead of keying it into the field.

NOTICE: If you want to print labels for all submittals, do not select a submittal in the “Submittal” dropdown and click the Label button. If you want to print one submittal, select the submittal in the “Submittal” dropdown and click the Label button.

Preprocess Sheets

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

Petition Summary

Petition #: TestVoter Title: 2015 Test Voter Candidate for City Electn...

County: Jefferson Submittal: 1 Auto Assign Current Submittals 0

Circulator: VOTER, TEST

Receive Bulk Sheets

Accepted Sheet: 2 Receive Sheets: Last Good Line: Save

Sheet Information

Max Lines: Approval Date: 06/10/2015 GOTO: Save & Next

Page #: 2 Last Good Line: 10 GOTO: Save

Line	Code	Description
1	1	Good
2	3	Blank
3	3	Blank
4	3	Blank
5	3	Blank
6	3	Blank
7	3	Blank
8	3	Blank
9	3	Blank
10	1	Good

Code	Description
1	Good
2	Crossed out
3	Blank
4	No signature

Label Complete Clear Close

7/7 Backward Forward Save As... Close

I-174
Submittal #: 9

Petition Preprocessing

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

Click them in this order.

Petition Summary

Petition #: TestVoter Title: 2015 Test Voter Candidate for City Electn...

County: Jefferson Submittal: 1 Auto Assign Current Submittals 0

Circulator: VOTER, TEST

Receive Bulk Sheets

Accepted Sheet: 2 Receive Sheets: Last Good Line: Save

Sheet Information

Max Lines: Approval Date: 06/10/2015

Page #: 2 Last Good Line: 10 GOTO: Save & Next: Save

Line	Code	Description
1	1	Good
2	3	Blank
3	3	Blank
4	3	Blank
5	3	Blank
6	3	Blank
7	3	Blank
8	3	Blank
9	3	Blank
10	1	Good

Code	Description
1	Good
2	Crossed out
3	Blank
4	No signature

Label Complete Clear Close

Processing Signatures



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.

Edit Petition

Petition Circulators Signatures Reports

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

Petition Description

Filing Officer: Jefferson Group: [] [Group Information](#)

Petition #: TestVoter District: WHITEHALL CITY - CW_W

Type: Candidate Scope: City Status: Active

Title: 2015 Test Voter Candidate for City Election

Summary: Test Voter for City Election

Date Filed: 06/10/2015 Certified Date: [] Election Date: 09/01/2015

Start Circulation: 06/10/2015 End Circulation: 07/01/2015 Req'd Signatures: 10 Max Lines: []

Circulator(s)

Name
VOTER, TEST

New Detail Delete

Candidate

Position: []

Name: []

New Detail Delete

Signature Statistics

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

Delete Preprocess Sheets Process Signatures

Refresh

Process Signatures

Submittal #: [] Process

Save Close

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.

The screenshot shows the 'Signature Processing' application window. At the top, it displays 'Petition #: TestVoter', 'Title: 2015 Test Voter Candidate for City Election', and 'Petition Status: Active'. Below this is a search section with fields for 'Last Name' (containing 'voter'), 'First Name' (containing 'test'), 'Phone Number', 'House #', 'Street Name', 'City', and 'Zip'. A 'Search' button is highlighted with a red circle. Below the search fields are 'Mailing Address' and 'Country' fields, along with checkboxes for 'Secondary Statewide Search', 'Search Soundex', and 'Search Statewide'. A 'Clear' button is also present. The 'Save' section includes 'Status', 'Reason', 'Sheet #', and 'Line #' fields, along with 'Name', 'Processed Date' (06/10/2015), and 'Record Has Not Been Processed' fields. There are buttons for 'Edit', 'Mark For Later Review', 'Save & Prev', 'Save & Next', and 'Save'. The 'Jurisdiction' is set to 'Jefferson'. Below this is a table of search results:

Signatures	Status	Name	Address	Mailing Address
	Active	VOTER TEST	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

NOTE:

It is **not recommended** to click on “**Secondary Statewide Search**” or “**Search Statewide**” since searching for people who are registered outside your county can be confusing.

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

Signature Processing

Signature Options Reports

Voter Search Help

Petition #: TestVoter Title: 2015 Test Voter Candidate for City Election Petition Status: Active

Submittal: 1

Search

Last Name voter First Name test Phone Number House #

Street Name City Zip

Mailing

Address City/St/Zip

Country Secondary Statewide Search Search Soundex Search Statewide Clear Search

Save

Status Reason Sheet # 1 Line # 1

Name Processed Date 06/10/2015 Record Has Not Been Processed Edit

Comment Mark For Later Review Save & Prev Save & Next Save

Jurisdiction Jefferson F8 - No Match, Save & Next F9 - Accept, Save & Next F10 - Select, Focus On Reason
F11 - Not Registered, Focus On Name F12 - Not Registered, Save & Next

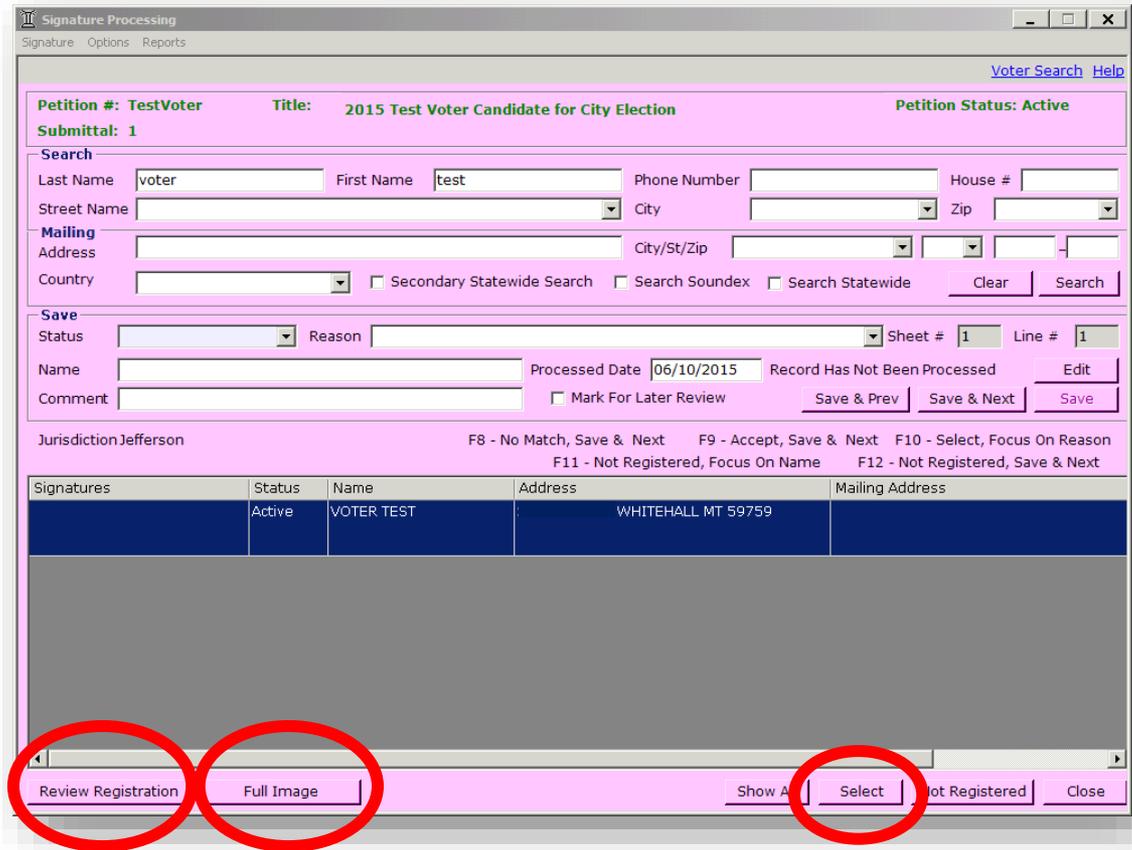
Signatures	Status	Name	Address	Mailing Address
	Active	VOTER TEST	WHITEHALL MT 59759	

Review Registration Full Image Show All Select Not Registered Close

Processing Signatures

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.

Signature Processing

Signature Options Reports

Voter Search Help

Petition #: TestVoter Title: 2015 Test Voter Candidate for City Election Petition Status: Active

Submittal: 1

Search

Last Name voter First Name test Phone Number House #

Street Name City Zip

Mailing

Address City/St/Zip

Country Secondary Statewide Search Search Soundex Search Statewide Clear Search

Save

Status Accepted Reason Sheet # 1 Line # 1

Name Processed Date 06/11/2015 Record Has Not Been Processed Edit

Comment Mark For Later Review Save & Prev Save & Next Save

Jurisdiction Jefferson F8 - No Match, Save & Next F9 - Accept, Save & Next F10 - Select, Focus On Reason F11 - Not Registered, Focus On Name F12 - Not Registered, Save & Next

Signatures	Status	Name	Address	Mailing Address
	Active	VOTER TEST	ST WHITEHALL MT 59759	

Review Registration Full Image Show All Select Not Registered Close

See Appendix A for explanations of these samples

Sample Petition Signature Sheet

							For County Election Office Use Only	
Training Note: Counted or Not?		Signature	Date Signed	Residence Address or P.O. Address or Home Phone	Printed Last Name, First and Middle Initials	Legis. Rep. Dist. #	Rsvd	
1	Not counted: All information is illegible	Vladimir Putin	1-7	WZZKONAW	AWKOW			
2	Not counted: Not registered in Montana	Vladimir Putin	1-7	1 Crimea Way, Kiev, Russia	Putin, V			
3	Counted: Even though the signature on file is <i>Gerry Tall</i> , count if the signature on file, when taken as a whole, matches the one on file	G. R. Tall	1-7	100 South Western, Helena, MT 59601	Tall, G.R.			
4	Not counted: Elector provided no residence address, PO Box, or phone #	Skip Tracy	1-7		Tracy, S.M.			
5	Not counted: Attempted duplicate of Signature 3	G.R. Tall	1-7	100 South West, Helena, MT	Tall, G.R.			
6	Counted: Even though no town or city listed, as long as you can identify the voter	Sherry Bobbins	1-7	100 Mountain Ave.	S.C. Bobbins			
7	Not counted: Not registered in county indicated below.	Moe White	1-7	100 Yell Lane, Billings, MT	White, M. R.			
8	Counted: Even though address does not match address on file, since signature matches	Ed Anders	1-7	100 1st, Helena, MT 59101	Anders, E.			

Signers do not fill in this section; it is for optional election office use only

Processing Signatures

You are now ready to process your next signature line.

As you can see you are still on **Sheet # 1** but are now on **Line # 2**.

We will pretend that this individual is **not** a registered voter.

Signature Processing
Signature Options Reports

Voter record has been saved. [Voter Search](#) [Help](#)

Petition #: TestVoter **Title:** 2015 Test Voter Candidate for City Election **Petition Status:** Active
Submittal: 1

Search
Last Name First Name Phone Number House #
Street Name City Zip

Mailing
Address City/St/Zip
Country Secondary Statewide Search Search Soundex Search Statewide

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

You have two Rejection options:

- 1) If the voter is **not registered**, the most efficient option is to enter the name in the Save area and click **Not Registered** at the bottom of the screen. This will pre-fill the Status and the reason as Not Registered.
- 2) Or, you can enter the **Status**, and choose the specific **Reason** for rejection from the drop-down.

Then click **Save and Next**.

The screenshot shows the 'Signature Processing' application window. At the top, a green message states 'Voter record has been saved.' The main form displays the following information:

- Petition #:** TestVoter
- Title:** 2015 Test Voter Candidate for City Election
- Petition Status:** Active
- Submittal:** 1

The form includes sections for Search, Mailing, and Save. In the Save section, the Name field contains 'Test Voter 2' and the Status dropdown is set to 'A'. The Sheet # is 1 and Line # is 2. The 'Save & Next' button is highlighted with a red circle. At the bottom of the window, the 'Not Registered' button is also highlighted with a red circle.

Buttons at the bottom of the window include: Review Registration, Full Image, Show All, Select, Not Registered, and Close.

Processing Signatures

On the next line, try to add the same voter that you accepted from Line 1. Since you accepted the signature, you should receive a pop-up screen warning that they have **already signed** the petition.

Reject this signature as a **Duplicate**.

Click **Save & Next**.

The screenshot displays the 'Signature Processing' application window. At the top, it shows 'Petition #: I-184', 'Title: Initiative No. 184', and 'Petition Status: Active'. Below this is a search form with fields for 'Last Name' (mills), 'First Name' (test), 'Middle Name', and 'Phone Number'. The 'Status' dropdown menu is set to 'Accepted' and is circled in red. A 'Voter Validations' pop-up window is open, showing a message: 'The voter has already signed this petition 2 time(s)', which is also circled in red. The interface includes various buttons like 'Save & Next', 'Edit', and 'Close'.

Processing Signatures

Rejection Reasons:

- **Not Registered** means not registered in your county (even if the signer *is* registered in another county):
 - Type the voter's name in the **Name** field below the Status field. This will display the name on the summary so you know whose signature was rejected; otherwise if you receive an inquiry about whether a signature was rejected, you won't be able to find the signer's name.
- **Duplicate** means there is already an accepted signature for the signer.
- **Out of District** no longer exist, use **Not Registered in County/District**.

Petition #: I-187 Title: Initiative No. 187 Petition Status: Active
Submittal: 1

Search
Last Name [] First Name [] Middle Name [] Phone Number []
House # [] Street Name [] City [] Zip []

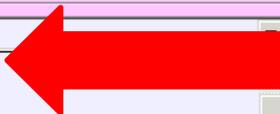
Mailing
Address [] City/St/Zip [] [] []
Country [] Secondary Statewide Search Search Soundex Search Statewide [Clear] [Search]

Save
Status: Rejected Reason: [] Sheet # 1 Line # 3
Name: []
Comment: []
Jurisdiction: Beaverhead F7 - Sa

Not Registered in County/District - NR
Duplicate - DUP
Signature No Match - SNM
Illegible - IL
Blank Line - BL
Crossed Out - C
Withdrawn - WD
Other - OTH

Been Processed [Edit]
[] [Save & Next] [Save]
F10 - Select, Focus On Reason
- Not Registered, Save & Next

Signatures	Status	Name	Address	Mailing Address
------------	--------	------	---------	-----------------

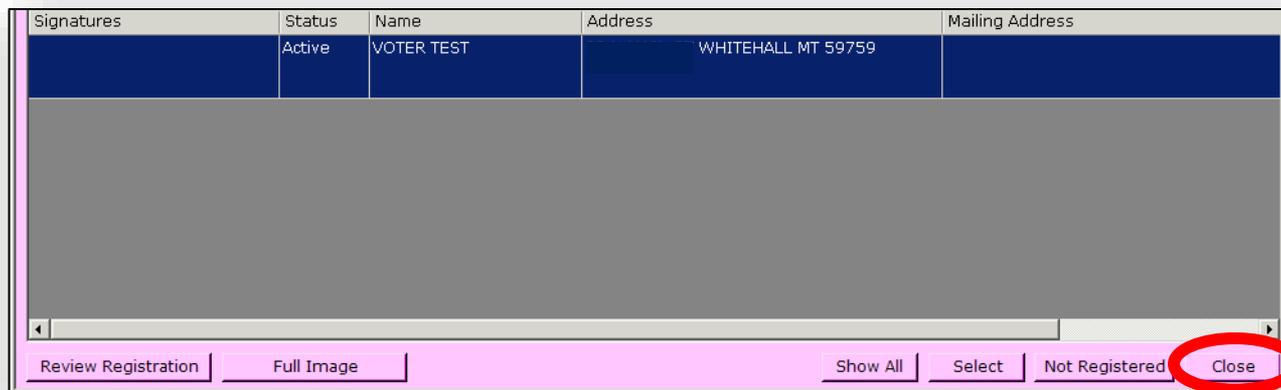


Processing Signatures

Continue to add voters for the associated lines.

When you reach the end of the petition you should see a message at the top of your screen that says **“No unprocessed signatures with a page number greater than the number you entered on the Preprocessed Sheets screen.”**

When you receive this message, click **Close**.



The screenshot shows a web application interface with a table of signatures. The table has five columns: Signatures, Status, Name, Address, and Mailing Address. The first row of data shows 'Active' status, 'VOTER TEST' name, and 'WHITEHALL MT 59759' address. 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	WHITEHALL MT 59759	

Review Registration Full Image Show All Select Not Registered **Close**

Processing Signatures

You will now see a **Summary** of your submittal.

If you notice an error on this screen you can click on the line and correct that record.

When all lines have been processed correctly, click the **Completed** button and then the **Close** button which will bring you back to the main Petitions screen.

The Petitions screen will now include a summary of the submittal.

The screenshot shows a web application window titled "Petition Signature Query". The main content area is pink and contains the following information:

- Query executed successfully. Showing 12 results.
- 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 this is a search section with fields for From Page, To, Status, Reason, Date Processed, Page #, Line #, and Voter ID. A "Clear" and "Search" button are also present.

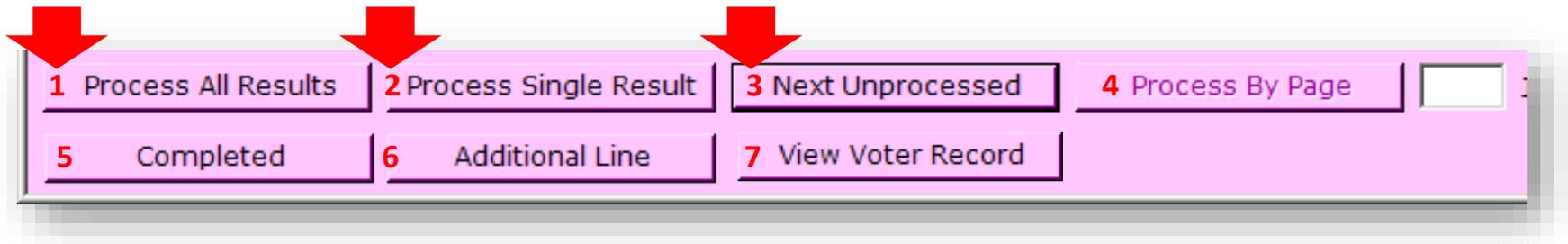
Signature	Page	Line	Name	Address	Voter ID	Sign Status	Sign Reason
1	1	1	VOTER, TEST	WHITEHALL MT 59759	450131...	Accepted	
1	1	2	Name not registered			Rejected	Not Regist...
1	2	1	VOTER, TEST	WHITEHALL MT 59759	450131...	Rejected	Duplicate
1	2	2	Joe Schmo			Rejected	Not Regist...
1	2	3	Jane Doe			Rejected	Not Regist...
1	2	4	John Doe			Rejected	Not Regist...
1	2	5	Sam Davies			Rejected	Not Regist...
1	2	6	dan martins			Rejected	Not Regist...
1	2	7	Roger Sellers			Rejected	Not Regist...
1	2	8	Stan Kubrick			Rejected	Not Regist...
1	2	9	William Murray			Rejected	Not Regist...
1	2	10	Wes Anderson			Rejected	Not Regist...

At the bottom of the window, there are several buttons: "Process All Results", "Process Single Result", "Next Unprocessed", "Process By Date", "Completed", and "Close". The "Completed" and "Close" buttons are circled in red, and a red arrow points from the "Completed" button to the "Close" button.

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

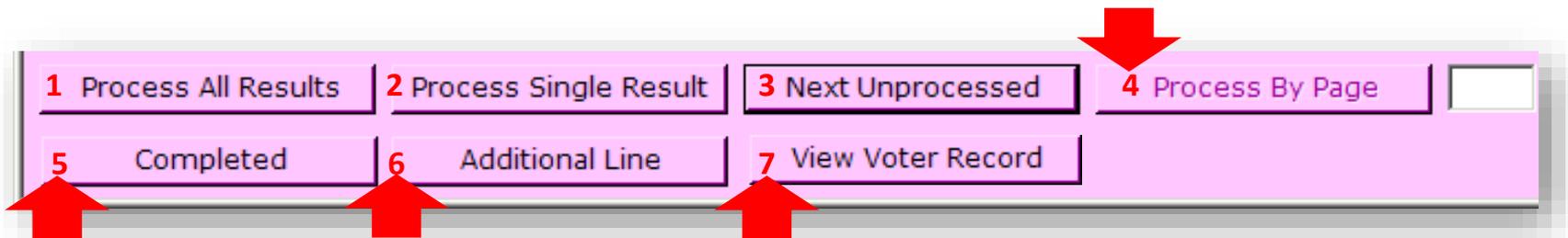
Review of Options on Petition Signature Query Screen

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**.

The record has been updated successfully. [Voter Search](#) [Help](#)

Petition Description

Filing Officer: Gallatin Group: [Group Information](#)

Petition #: 1234 District: MANHATTAN CITYWIDE - CW-MAN

Type: Initiative / Referendum Scope: City Status: Not Qualified

Title: Example Petition 1234

Summary: This is an example of a petition.

Date Filed: 01/08/2014 Certified Date: Election Date: 11/05/2014

Start Circulation: 01/08/2014 End Circulation: 10/05/2014 Req'd Signatures: 10000 Max Lines: 25

Circulator(s)

Name	Group
MURRAY, ZACHARY ROBERT	Circulator, Test
<input type="text"/>	<input type="text"/>

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

Signature Statistics

Signature	Size	Accepted	Rejected	Remaining
1 - 1	27	1	26	0
<input type="text"/>				

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

Candidate

Position:

Name:

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

Process Signatures

Submittal #: [Process](#)

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

Processing Signatures

For local (City/County/
Special District) petitions,
when the entirety of the
petition has been
completed, the election
administrator will need to
change its status on the Edit
Petition screen.

In this example, the petition
is Not Qualified. (For
statewide petitions, the
Secretary of State's office
will change the status.)

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

- Status:** Not Qualified (highlighted with a red circle)
- Petition #:** 1234
- District:** MANHATTAN CITYWIDE - CW-MAN
- Type:** Initiative / Referendum
- Scope:** City
- Title:** Example Petition 1234
- Summary:** This is an example of a petition.
- Date Filed:** 01/08/2014
- 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

Signature Statistics

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

Process Signatures

Submission # [] [Process]

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.

NOTE: VOTER REGISTRATION REQUIRES U.S. CITIZENSHIP

ELIGIBILITY REQUIREMENTS AND IDENTIFYING INFORMATION

1 Check all that apply: New Registration Name Change Address Change Signature Update Other

2 Are you a citizen of the United States?* Yes No
Will you be at least 18 years of age on or before the next election?* Yes No
Will you be a Montana resident for at least 30 days before the next election?* Yes No
*If you checked "No" in response to any of these questions, do not complete this form.

3 Last Name* First Name* Middle Name (Optional) Suffix (jr., sr., etc.)

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

5 Select one of the following and provide the required information*
 I have a Montana Driver's License or Montana ID 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	100917
------	--------	-------	------------------	------	--------	--------

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.

The screenshot shows the 'Petitions' module interface. A red circle highlights the 'Reports' dropdown menu, which contains the following options: Circulators, Petition Processing Statistics, Petition Signers, and Petition Signature Statistics. The main form includes fields for Filing Officer (Ravalli), Petition # (TEST), Type (Other), Scope (County), Status (Inactive), Title (TEST), and Summary (TEST). It also has date fields for Date Filed (07/17/2002), Start Circulation (07/17/2002), and Election Date. There are sections for Circulator(s) and Candidate, each with Name and Position fields and New, Detail, and Delete buttons. At the bottom, there is a 'Signature Statistics' table with columns for County, Signature, Size, Accepted, Rejected, and Remaining, and buttons for Delete, Preprocess Sheets, and Process Signatures. A Refresh button is at the bottom left, and Save and Close buttons are at the bottom right.

County	Signature	Size	Accepted	Rejected	Remaining

Petition Reports

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

The screenshot shows the 'Petition Signature Query' application window. The title bar reads 'Petition Signature Query'. Below the title bar are menu options: 'Process', 'Options', and 'Reports'. A status message says 'Query executed successfully. Showing 2 results.' with links for 'Voter Search' and 'Help'. The main area displays petition details: 'Petition #: I-184', 'Title: Initiative No. 184', and 'Petition Status: Active'. Below this are fields for 'Submittal: 1', 'Signature 1', 'Signature Size: 15', 'Accepted: 2', 'Rejected: 3', and 'Remaining: 10'. A search section includes 'From Page', 'To', 'Status: Rejected', 'Reason: Not Registered', 'Date Processed', 'Page #', 'Line #', and 'Voter ID'. There are 'Clear' and 'Search' buttons. A table below shows two results:

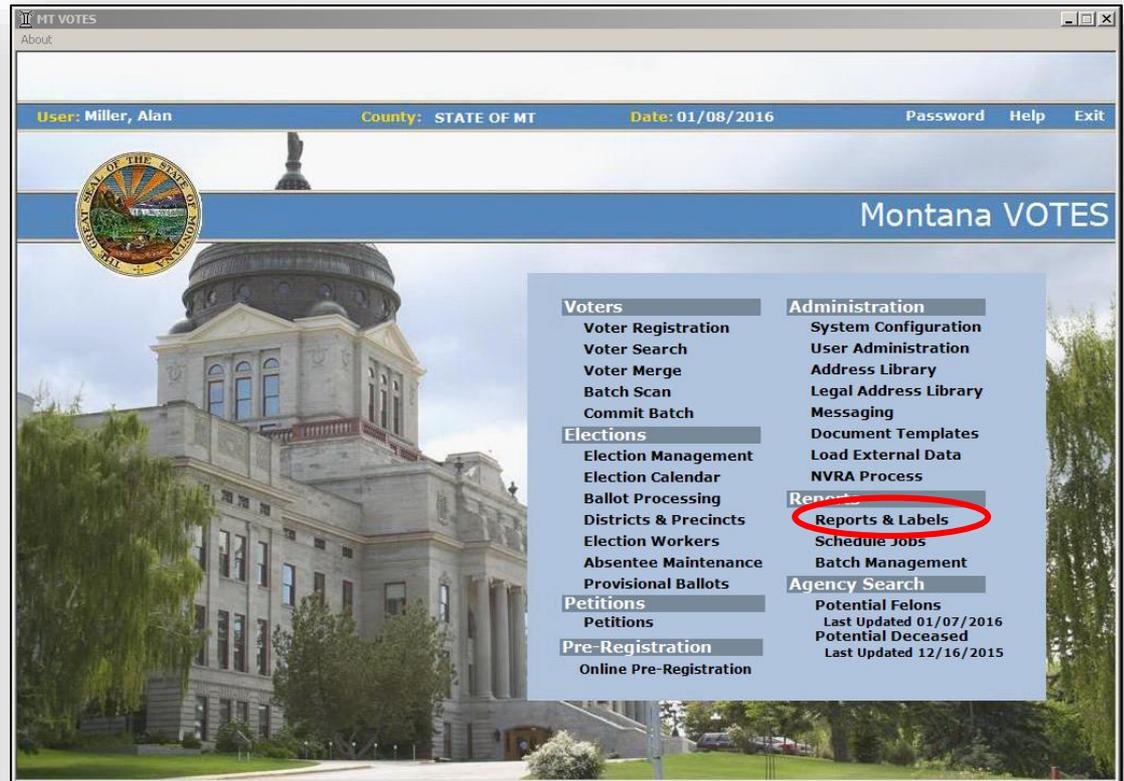
Signature	Page	Line	Name	Address	Voter ID	Sign Status	Sign Reason
1	1	2	Test Voter 2			Rejected	Not Regist...
1	1	3	Test Voter 3 Not Registered...			Rejected	Not Regist...

At the bottom, there are buttons for 'Process All Results', 'Process Single Result', 'Next Unprocessed', 'Process By Page', 'Jurisdiction: Gallatin', and 'Close'. Below these are 'Completed', 'Additional Line', and 'View Voter Record' buttons.

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**

The screenshot shows the 'Reports' window with the following fields and options:

- County:** Beaverhead
- Petition Type:** Initiative / Referendum
- Petition Name:** Initiative Referendum No. 124
- Petition Submittals:** All Submittals
- Petition Signatures:** All
- Status:** All
- Date Range:** From: [] To: []
- Table:**

CODE	NAME	Sort Order
PM-003	Petition Processing Statistics	PETITION
PM-004	Petitions	DISTRICT
PM-005	Petition Signers	SUBMITTAL-CODE
PM-006	Petition Signature Statistics	
PM-007	Petition Summary Results Verification	
PM-008	Petition Signature Page Line Statistics	
PM-009	Petition Certification - Statistics by House District	
PM-010	Duplicate/Triplicate Signature For Petition	
PM-011	Petition Signers / Changed Counties	
PM-012	Unfinished Submittals	
- Folder:** []
- Buttons:** Browse, Export, Cancel, Run Report

Numbered arrows indicate the following steps:

- 1st: Click **Petitions** in the left sidebar.
- 2nd: Select **PM-009** in the table.
- 3rd: Select **Initiative / Referendum** in the **Petition Type** dropdown.
- 4th: Select **Initiative Referendum No. 124** in the **Petition Name** dropdown.
- 5th: Check **All Submittals** in the **Petition Submittals** section.
- 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 UserName : 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:

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

HouseDistrict No : <u>HD.078</u>	Total : <u>1</u>
----------------------------------	------------------

Grand Total : 1

signatures are valid; and I further certify that the affidavit of the signature gatherer of the petition is attached.

Date signed : _____

Signature _____

SEAL

TestEnvironment.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.

County: State of Montana
Legislative Session: 2023-2024
Date: 01/27/2024
Report No.: 100000

Petition Certification - Statistics by House District

To the Honorable Secretary of State of the State of Montana:
I, _____, Clerk of the Senate of the State of Montana, do hereby certify that I have examined the attached _____ Petition-Adoption of the Constitution of the State of Montana and the same is in accordance with the provisions of Article XVII, Section 2, of the Montana Constitution.

House District No.	Total
15, 022	1
Grand Total:	1

House District No.: 15, 022
Total: 1
Grand Total: 1

Signatures are valid, and I further certify that the affidavit of the signature petitioner of the petition is attached.

Date signed: _____
Signature: _____
SEAL

Ballot Administration Unit (BAU) Page: 1

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 **1-174 - Initiative No. 174 - 05/29/2014** in the manner prescribed by law and I believe that _____

Petition Summary:

HouseDistrict No : <u>HD_043</u>	Total : 1
HouseDistrict No : <u>HD_046</u>	Total : 3
HouseDistrict No : <u>HD_051</u>	Total : 1
HouseDistrict No : <u>HD_054</u>	Total : 2
Grand Total : 7	

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 further certify that the affidavit of the certifier (sheet) (section) of the petition is attached to the post office address, residence address, or telephone number is _____ for each valid signature.

Date signed : 6-24-14
Signature: Skip Tracy
Signature

SEAL

Montana VOTES

Page : 1 / 3

Montana Secretary of State
2014-174 Ballot Box
Reviewed for statutory requirements
by CR
Tabulated 1/1 Signatures

2014 JUN 24 8:37
YELLOWSTONE COUNTY
ELECTION ADMINISTRATOR

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		Circulators Report		Date : 01/29/2018	
User Name : Miller, Alan				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		
<hr/>		
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		
<hr/>		
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
<hr/>		
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					
<u>SUBMITTAL:1</u>										
<u>SIGNATURE:1</u>										
Sub. #	Page	Line	Voter ID	Name	Residence	Status	Verification Reason	House District	Circulator	Processed Date

Petition Reports

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

County: Gallatin User Name : Miller, Alan	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	
<u>STATISTICS</u>		
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		
<hr/>		
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		
<hr/>		
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
<hr/>		
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