
Schedule No. **3**

**Elections
Records
Schedule**

**Adopted by the Local Government
Records Committee, August 1996
Revision 1.4 Adopted April 2010**

MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE

DEPARTMENT: ELECTIONS

ITEM RECORD TITLE AND DESCRIPTION RETENTION TIME COMMENTS

1.	<p>ABSENTEE BALLOT ENVELOPES</p> <ul style="list-style-type: none"> a. Returned/Verification (signed envelopes) b. Secrecy 	a. & b. 1 year	
2.	<p>ABSENTEE BALLOT LOGS</p> <ul style="list-style-type: none"> a. Voter's Absentee ballot request-county and local elections b. Voter's absentee ballot request-state and federal elections c. Election administrator's certification of absentee ballots issued d. Voter's request to be on permanent absentee list e. Confirmation letter to permanent absentee voter 	<ul style="list-style-type: none"> a. 1 year if no recount is pending. b. 2 years if no recount is pending. c. 1 year for county & local elections; 2 years for state and federal elections. d. Permanent e. 1 year for county & local elections; 2 years for state and federal elections 	
3.	<p>ADDRESS CONFIRMATION CARDS- Notification cards sent to voters that failed to vote in a General election or because mail ballot was returned as undeliverable.</p>	Permanent- Microfilm if possible	
4.	<p>AFFIDAVITS OF PUBLICATION (Notices of election)</p> <ul style="list-style-type: none"> a. close of registration b. polling places c. notice of election d. notice-public test of election machine e. filing deadlines f. proof of publications 	<p>County and Local Government- 1 year</p> <p>State and Federal- 2 years***</p>	
5.	<p>AUDIT LOG- CENTRAL COUNTER or PRECINCT COUNTER</p>	<p>1 year for county & local elections.</p> <p>2 years for state & federal elections.</p>	
6.	<p>AUTOMARK FLASHCARD –Necessary to mark the ballots or produce audio of ballot.</p>	6 days after the canvass of the election if no recount or court action is pending.	
7.	<p>BALLOTS –COUNTY AND LOCAL GOVERNMENT-</p> <ul style="list-style-type: none"> a. Voted and un-voted and detached stubs b. Unused c. Unverified Provisional ballots d. Verified Provisional ballot secrecy envelopes and outer affirmation envelope. e. Test Ballots-Automark 	<ul style="list-style-type: none"> a. 1 year if no recount is pending * see MCA 13-1-303 b. 6 months c. and d. 1 year e. 1 year 	

MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE

DEPARTMENT: ELECTIONS

ITEM	RECORD TITLE AND DESCRIPTION	RETENTION TIME	COMMENTS
8.	BALLOTS –STATE AND FEDERAL a. Voted and un-voted and detached stubs b. Unused c. Unverified Provisional ballots d. Verified Provisional ballot secrecy envelopes and outer affirmation envelope. e. Test Ballots-Automark	a. 2 years* if no recount is pending (federal law) see Federal Law*** b. 6 months c. and d. 2 years e. 2 years	
9.	CANDIDATE FILING FORMS OR PETITIONS		See Clerk and Recorders Retention Schedule for filing and retention time of candidates financial statements and oaths of office.
10.	CANDIDATES- REGISTER OF	4 years	
11.	CANVASS BOOKS/RESULTS	County and Local Government- 1 year State and Federal- 2 years***	
12.	CERTIFICATION OF AUTOMARK TESTING	2 years if no recount is pending	
13.	CERTIFICATION OF TABULATION EQUIPMENT TESTING	2 years if no recount is pending	
14.	ELECTION SEAL LOG	2 years if no recount is pending	
15.	ELECTRONIC DEVICE or related software necessary to count ballots.	6 days after the canvass of the election if no recount or court action is pending.	
16.	INVOICES FOR ELECTION COSTS	Audit + 1 year	
17.	M 100 TAPE ROLLS- Tracks all activity on the M 100 machine.	2 years if no recount.	

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DEPARTMENT: ELECTIONS

ITEM	RECORD TITLE AND DESCRIPTION	RETENTION TIME	COMMENTS
18.	MAIL BALLOT ELECTIONS a. Secrecy envelopes b. Returned/Verification (signed envelope) c. Undeliverable envelopes d. Ballots e. Daily tally of mail ballots received f. Record of questioned ballots g. Transport box seal register h. Written plan-duplicate-original at Secretary of State office i. Replacement ballot register j. Record of ballot voted in person k. Place of deposit signature log l. Replacement ballot request	County and Local Government-1 year if no recount /court action is pending State- 2 years unless court action or recount is pending.	
19.	OFFICIAL RETURNS OF ELECTION	Permanent	
20.	PETITIONS- LOCAL	8 years	Originals
21.	PETITIONS- STATEWIDE a. non-Presidential b. Presidential	a. 3 months after election** see MCA 13-27-305 b. 2 years***	Copies
22.	POLL AND TALLY BOOKS	4 years	
23.	POST ELECTION AUDIT RECONCILIATION AND REPORT TO SECRETARY OF STATE	2 years if no recount is pending	
24.	PRECINCT MAPS	Permanent	
25.	PRECINCT REGISTERS	4 years	Historic value
26.	REGISTRATION CARDS	Permanent- Original and latest change of address or cancellation	Microfilm if possible
27.	RESOLUTIONS CALLING FOR ELECTION a. special district b. school c. county	Original- Permanent Duplicate copies- 1 year	

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

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

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

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DEPARTMENT: ELECTIONS

ITEM	RECORD TITLE AND DESCRIPTION	RETENTION TIME	COMMENTS
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REVISED Rev 1.1 11-2003

ITEM 5 BALLOTS –COUNTY AND LOCAL GOVERNMENT- Added:

- c. Unverified Provisional ballots Retention time c. and d. 1 year
- d. Verified Provisional ballot secrecy envelopes and outer affirmation envelope

ITEM 6 Added: BALLOTS –STATE AND FEDERAL Added:

- c. Unverified Provisional ballots Retention time c. and d. 2 years
- d. Verified Provisional ballot secrecy envelopes and outer affirmation envelope

REVISED Rev. 1.2 10-2006

Item 1 ABSENTEE BALLOT LOGS revised as shown below

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| 1. ABSENTEE BALLOT LOGS | a. 1 year if no recount is pending. | Deleted:4 years see MCA 13-13-233. |
| a. Voter's Absentee ballot request-county and local elections | b. 2 years if no recount is pending. | |
| b. Voter's absentee ballot request-state and federal elections | c. 1 year for county & local elections; 2 years for state and federal elections. | |
| c. Election administrator's certification of absentee ballots issued | d. Permanent | |
| d. Voter's request to be on permanent absentee list | e. 1 year for county & local elections; 2 years for state and federal elections. | |
| e. Confirmation letter to permanent absentee voter | | |

Item 2: ABSENTEE BALLOT ENVELOPES- Changed retention time to 1 year.

Item 3. ADDRESS CONFIRMATION CARDS -Added "or because mail ballot was returned as undeliverable."

New Item #5 - AUDIT LOG **Note: all items after this are renumbered**

New Item #6 - AUTOMARK FLASHCARD

Item #7 -BALLOTS-COUNTY AND LOCAL GOVERNMENT- Deleted from a. "Includes signed affirmation envelopes and undelivered or returned envelopes from mail ballot elections"

Item #8 BALLOTS-STATE AND FEDERAL Deleted from a. "Includes signed affirmation envelopes and undelivered or returned envelopes from mail ballot elections"

Item #9 CANDIDATE FILING SHEETS OR PETITIONS –replaced "SHEETS" with "FORMS"; Ret. Time - deleted "Terms of office"; Comments added "See Clerk and Records Retention Schedule for filing and retention time of candidates financial statements and oaths of office."

New Item #12 - ELECTRONIC DEVICE

New Item #13 -INVOICES FOR ELECTION COSTS

REVISION 1.3 10-2009

Item s# 7a. & 8 a.) added "and detached stubs"

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ITEM RECORD TITLE AND DESCRIPTION RETENTION TIME COMMENTS

REVISED 1.4 4-2010

Face Sheet -Corrected adopted date from April 2005 to August 1996 & added Rev 1.4 and date adopted April 2010

Items # 7 e. & 8 e. added: Test Ballots-Automark

7.e 1 year

8.e 2 years

New Items: #12, 13, 14, 17, and 23

Note: all items starting with # 12 are renumbered.

12.	CERTIFICATION OF AUTOMARK TESTING	2 years if no recount is pending
13.	CERTIFICATION OF TABULATION EQUIPMENT TESTING	2 years if no recount is pending
14.	ELECTION SEAL LOG	2 years if no recount is pending
17.	M 100 TAPE ROLLS- Tracks all activity on the M 100 machine.	2 years if no recount.
23.	POST ELECTION AUDIT RECONCILIATION AND REPORT TO SECRETARY OF STATE	2 years if no recount is pending