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Schedule No. 3

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# Elections Records Schedule

**Adopted by the Local Government  
Records Committee, August 1996**

**LAST REVISED – MAY 2013**

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**MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE**

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**DEPARTMENT: ELECTIONS**

<b>ITEM</b>	<b>RECORD TITLE AND DESCRIPTION</b>	<b>RETENTION TIME</b>	<b>COMMENTS</b>
1.	ABSENTEE BALLOT ENVELOPES a. Returned/Verification (signed envelopes) b. Secrecy	a. & b. 1 year	
2.	ABSENTEE BALLOT LOGS 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. Confirmation letter to annual absentee voter	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. 1 year	
3.	ADDRESS CONFIRMATION CARDS- Notification cards sent to voters that failed to vote in a General election or because mail ballot was returned as undeliverable; part of NVRA process.	2 years	
4.	AFFIDAVITS OF PUBLICATION (Notices of election) 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	County and Local Government- 1 year  State and Federal- 2 years***	
5.	AUDIT LOG- CENTRAL COUNTER or PRECINCT COUNTER	1 year for county & local elections. 2 years for state & federal elections.	
6.	AUTOMARK FLASHCARD –Necessary to mark the ballots or produce audio of ballot.	6 days after the canvass of the election if no recount or court action is pending.	

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**MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE**

**DEPARTMENT: ELECTIONS**

<b>ITEM</b>	<b>RECORD TITLE AND DESCRIPTION</b>	<b>RETENTION TIME</b>	<b>COMMENTS</b>
7.	BALLOTS –COUNTY AND LOCAL GOVERNMENT- 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. 1 year if no recount is pending * see MCA 13-1-303 b. 6 months c. and d. 1 year e. 1 year	
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	

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**MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE**

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**DEPARTMENT: ELECTIONS**

<b>ITEM</b>	<b>RECORD TITLE AND DESCRIPTION</b>	<b>RETENTION TIME</b>	<b>COMMENTS</b>
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.	
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	

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## MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE

**DEPARTMENT: ELECTIONS**

<b>ITEM</b>	<b>RECORD TITLE AND DESCRIPTION</b>	<b>RETENTION TIME</b>	<b>COMMENTS</b>
25.	PRECINCT REGISTERS	4 years	Historic value
26.	ELECTIONS – REGISTRATION a. Voter Confirmation Card – returned as undeliverable b. Cancellation Notice from other Counties or States c. Death Notice from other Counties or States d. Lists of Purged Voters – canceled voters purged from the statewide system by SOS.	a. 5 years b. 4 years c. 4 years d. 5 years	
27.	REGISTRATION CARDS	Permanent- Original and latest change of address or cancellation	Microfilm if possible
28.	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

**MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE**

**DEPARTMENT: ELECTIONS**

<i>Revisions to Schedule</i>				
Date	Revision	Change		
11-2003	1	<p>ITEM 5 <u>BALLOTS –COUNTY AND LOCAL GOVERNMENT</u>  <b>Added:</b>                      c. Unverified Provisional ballots                      d. Verified Provisional ballot secrecy envelopes and outer affirmation envelope  <b>Retention</b> time for c. and d. 1 year</p> <p>ITEM 6 <u>BALLOTS –STATE AND FEDERAL</u>  <b>Added:</b>                      c. Unverified Provisional ballots                      d. Verified Provisional ballot secrecy envelopes and outer affirmation envelope  <b>Retention</b> time for c. and d. 2 years</p>		
10-2006	2	<p>ITEM 1 <u>ABSENTEE BALLOT LOGS</u>  <b>Revised:</b></p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> <li>a. Voter’s Absentee ballot request-county and local elections</li> <li>b. Voter’s absentee ballot request-state and federal elections</li> <li>c. Election administrator’s certification of absentee ballots issued</li> <li>d. Voter’s request to be on permanent absentee list</li> <li>e. Confirmation letter to permanent absentee voter</li> </ul> </td> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> <li>a. 1 year if no recount is pending.</li> <li>b. 2 years if no recount is pending.</li> <li>c. 1 year for county &amp; local elections; 2 years for state and federal elections.</li> <li>d. Permanent</li> <li>e. 1 year for county &amp; local elections; 2 years for state and federal elections.</li> </ul> </td> </tr> </table> <p><b>Deleted Citation:</b>                      4 years see MCA 13-13-233</p> <p>ITEM 2 <u>ABSENTEE BALLOT ENVELOPES</u>  <b>Changed:</b>                      Retention time - 1 year</p> <p>ITEM 3 <u>ADDRESS CONFIRMATION CARDS</u>  <b>Added:</b>                      “or because mail ballot was returned as undeliverable.”</p>	<ul style="list-style-type: none"> <li>a. Voter’s Absentee ballot request-county and local elections</li> <li>b. Voter’s absentee ballot request-state and federal elections</li> <li>c. Election administrator’s certification of absentee ballots issued</li> <li>d. Voter’s request to be on permanent absentee list</li> <li>e. Confirmation letter to permanent absentee voter</li> </ul>	<ul style="list-style-type: none"> <li>a. 1 year if no recount is pending.</li> <li>b. 2 years if no recount is pending.</li> <li>c. 1 year for county &amp; local elections; 2 years for state and federal elections.</li> <li>d. Permanent</li> <li>e. 1 year for county &amp; local elections; 2 years for state and federal elections.</li> </ul>
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*Revisions to Schedule*

Date	Revision	Change			
10-2006 (cont.)	2 (cont.)	<p>ITEM 5 <u>AUDIT LOG</u> <b>New</b> (all items after this are renumbered)</p> <p>ITEM 6 <u>AUTOMARK FLASHCARD</u> <b>New</b></p> <p>ITEM 7 <u>BALLOTS-COUNTY AND LOCAL GOVERNMENT</u> <b>Deleted</b> from: a. "Includes signed affirmation envelopes and undelivered or returned envelopes from mail ballot elections"</p> <p>ITEM 8 <u>BALLOTS-STATE AND FEDERAL</u> <b>Deleted</b> from a. : "Includes signed affirmation envelopes and undelivered or returned envelopes from mail ballot elections"</p> <p>ITEM 9 <u>CANDIDATE FILING SHEETS OR PETITIONS</u> <b>Replaced:</b> "SHEETS" with "FORMS" <b>Deleted :</b> Retention Time - "Terms of office" <b>Comments added:</b> "See Clerk and Recorders Retention Schedule for filing and retention time of candidates financial statements and oaths of office."</p> <p>ITEM 15 <u>ELECTRONIC DEVICE</u> <b>New</b></p> <p>ITEM 16 <u>INVOICES FOR ELECTION COSTS</u> <b>New</b></p>			
10-2009	3	<p>ITEM 7 <u>BALLOTS –COUNTY AND LOCAL GOVERNMENT</u> &amp; ITEM 8 <u>BALLOTS – BALLOTS –STATE AND FEDERAL</u> <b>Added</b> to: a. "...and detached stubs"</p>			
4-2010	4	<p><u>FACE SHEET</u> <b>Correction:</b> Changed adopted date from April 2005 to August 1996 &amp; added Rev. 1.4 April 2010</p> <p>ITEM 7 <u>BALLOTS –COUNTY AND LOCAL GOVERNMENT</u> <b>Added:</b> e. Test Ballots-Automark; Retention: 1 year</p> <p>ITEM 8 <u>BALLOTS – BALLOTS –STATE AND FEDERAL</u> <b>Added:</b> e. Test Ballots-Automark; Retention: 2 years</p> <p><b>NEW ITEMS:</b> 12, 13, 14, 17, and 23 <b>Note: all items starting with # 12 are renumbered.</b></p> <table border="1" data-bbox="701 1787 1481 1879"> <tr> <td data-bbox="701 1787 773 1879">12.</td> <td data-bbox="773 1787 1206 1879">CERTIFICATION OF AUTOMARK TESTING</td> <td data-bbox="1206 1787 1481 1879">2 years if no recount is pending</td> </tr> </table>	12.	CERTIFICATION OF AUTOMARK TESTING	2 years if no recount is pending
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23.	POST ELECTION AUDIT RECONCILIATION AND REPORT TO SECRETARY OF STATE	2 years if no recount is pending												
5-2012	5	<p><b>Changed:</b> ITEM 26 to <u>ELECTIONS – REGISTRATION</u></p> <ul style="list-style-type: none"> <li>a. Voter Confirmation Card – returned as undeliverable (5yrs)</li> <li>b. Cancellation Notice from other Counties or States (4 yrs)</li> <li>c. Death Notice from other Counties or States (4 yrs)</li> </ul> <p><b>Moved:</b> Former ITEM 26 <u>REGISTRATION CARDS</u> to ITEM 27 Former ITEM 27 <u>RESOLUTIONS CALLING FOR ELECTION</u> to ITEM 28</p>												
5-2013	6	<p>ITEM 26 <u>ELECTIONS – REGISTRATION</u></p> <p><b>Added:</b> d. Lists of Purged Voters – canceled voters purged from the statewide system by SOS (5 years)</p> <p>ITEM 3 <u>ADDRESS CONFIRMATION CARDS</u></p> <p><b>Changed:</b> Retention period from “Permanent- Microfilm if possible” to “2 years”.</p> <p>ITEM 2 <u>ABSENTEE BALLOT LOGS</u></p> <p><b>Deleted:</b> d. Voter’s request to be on permanent absentee list (Permanent)</p> <p><b>Changed:</b> e. Confirmation letter to permanent absentee voter to d.; the word “permanent” to “annual”; retention time from “1 year for county &amp; local elections; 2 years for state and federal elections” to “1 year”.</p>												