SOE Handbook on Certifying Candidate Petitions

Florida Department
of State
Division of Elections
R.A. Gray Building,
Room 316
500 South Bronough Street
Tallahassee, FL 32399-0250
(850) 245-6280

Rule 1S-2.045, F.A.C.

DS-DE 134 (eff. 3/2015)

Table of Contents

Getting Started 2

Important to Remember 3

How to Select an Election 4

How to Search for a Candidate in Petitioning Status 7

How to Search for a Candidate in Non-Petitioning Status 10

How to Change a Candidate from Non-Petitioning to Petitioning Status 13

How to Enter an Affidavit of Undue Burden 16

How to Enter Valid and Invalid Petitions 20

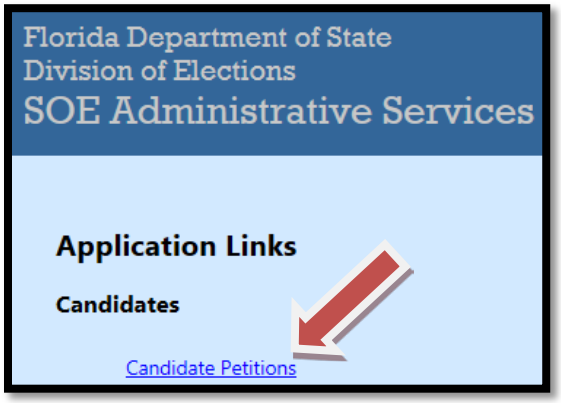
Candidates Qualifying by Random Sampling 28

Getting Started

Supervisors of Elections shall **electronically** certify verified candidate petitions to the Division of Elections using the Windows Live program for candidates who qualify with the Division of Elections.

Candidate petition certifications submitted by mail, email, or fax will not be accepted.

The Candidate Petitions application can be accessed via the Division's SOE Portal at https://soesecure.elections.myflorida.com/SOEAdminServices/ by clicking on the "**Candidate Petitions**" link.



All users must have a Windows Live ID and have been granted access to the Candidate Petition application by the county security manager. If additional users are needed, the security manager can grant existing users access to the application or can "invite" new users (on the 'Manage Security' page click on the '**Manual**' link for instructions). For more information regarding Windows Live ID refer to the Windows Live Id User Guide at http://soe.dos.state.fl.us/Manuals/WindowsLiveID_UserGuide.pdf.

Important to Remember

- A candidate becomes active when a properly executed Form DS-DE 9 is filed with the qualifying officer. Petitions signed and dated before the filing date of Form DS-DE 9 are not valid (except for federal and special district candidates).

- On the **Candidate Details** screen, the earliest date that a candidate can submit valid petitions for the office shown will appear next to **Petition Collection Starts**. However, if the candidate changes his or her office or party then **Last Office or Party Change Date** will be highlighted in **LARGE RED TYPE** and petitions are valid only after this date. It is extremely important that you verify the office, district and party on the candidate petition to ensure that it matches the current office, district and party.

- Both valid and invalid petitions need to be reported. If you have a batch of petitions submitted by a candidate that includes both valid and invalid signatures, you will need to enter data for both.

- If you receive petitions from a candidate and the candidate's name does not appear in the Petitioning Candidate List, the candidate will most likely be found in the Non-Petitioning Candidate List. A candidate in non-petitioning status is a candidate who has not already submitted petitions to a supervisor of elections office.

- If a candidate is not on either the petitioning or non-petitioning candidate list, the candidate has not filed as a candidate with the Division of Elections. The supervisor of elections office should contact the candidate and have the candidate call the Division of Elections at 850-245-6280 regarding the need to establish an active candidacy.

How to Select an Election

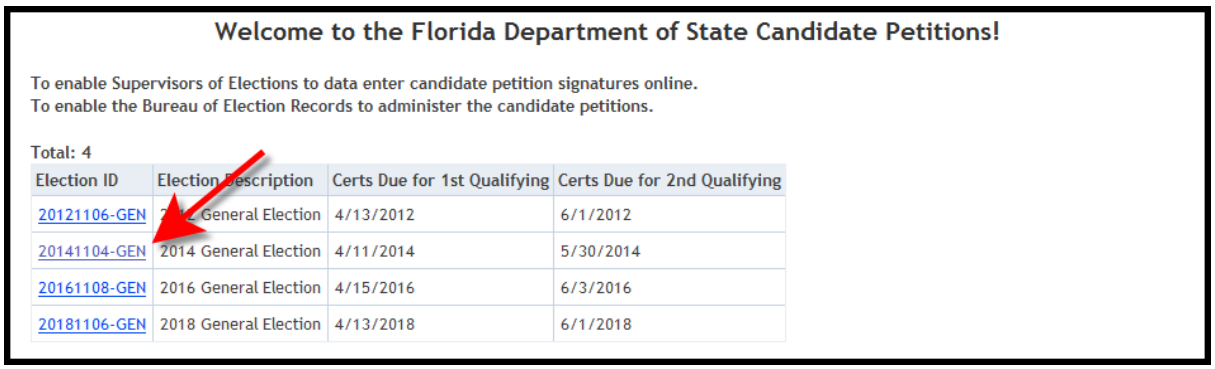
1. The application's "Home" screen lists the available elections from which to choose.

- **Election ID and Election Description:** Displays the election years for which certifications can be viewed (past elections) or updated and maintained (current and future elections).

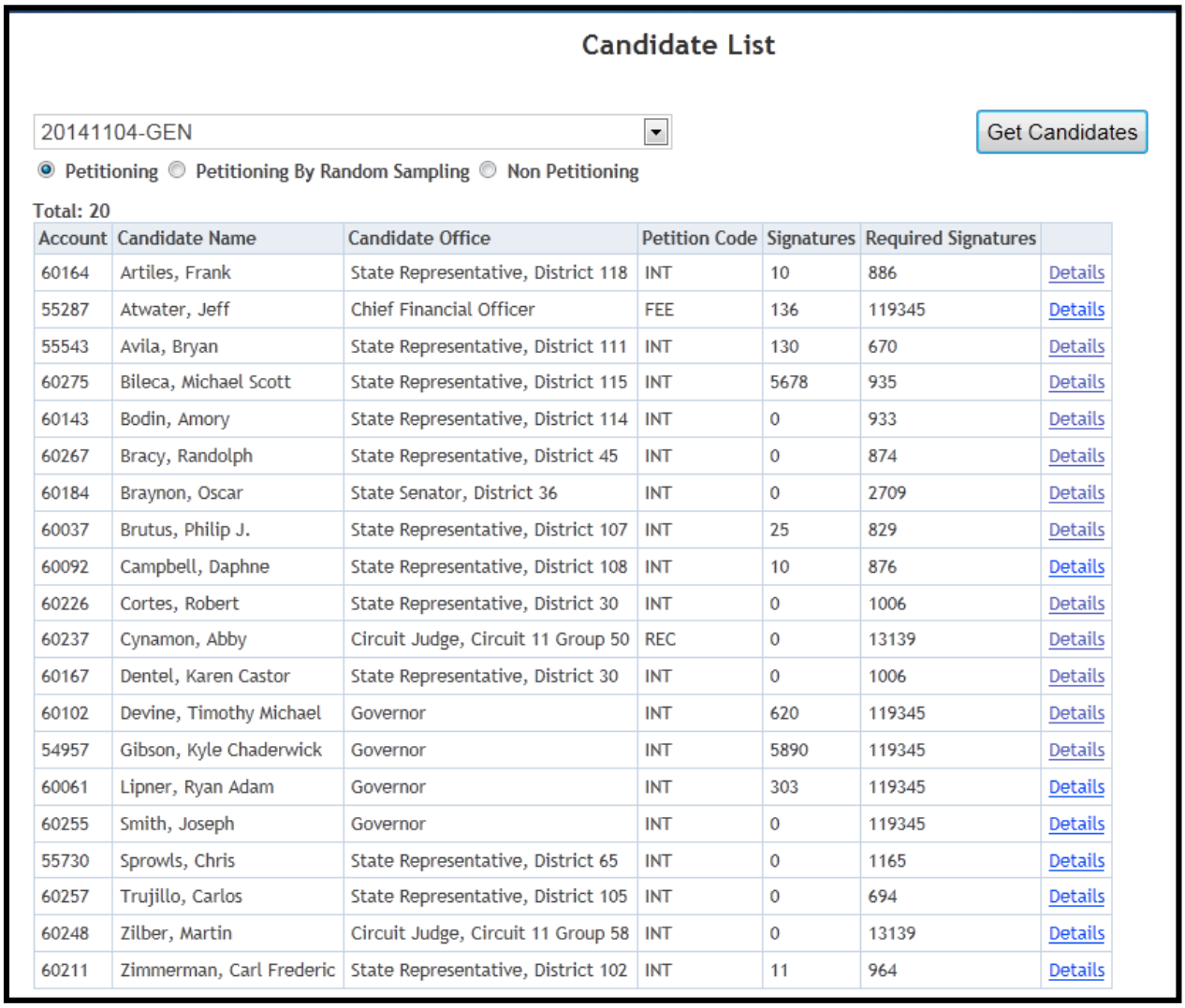
- **Certs Due for 1st Qualifying:** Displays the deadline for certifying petitions for the first qualifying period of the election year indicated.

- **Certs Due for 2nd Qualifying:** Displays the deadline for certifying petitions for the second qualifying period of the election year indicated.

2. Under **Election ID**, click on the appropriate election link.



3. This will bring you to the **Candidate List** screen.



Candidate List

20141104-GEN

Get Candidates

Petitioning Petitioning By Random Sampling Non Petitioning

Total: 20

Account	Candidate Name	Candidate Office	Petition Code	Signatures	Required Signatures	
60164	Artiles, Frank	State Representative, District 118	INT	10	886	Details
55287	Atwater, Jeff	Chief Financial Officer	FEE	136	119345	Details
55543	Avila, Bryan	State Representative, District 111	INT	130	670	Details
60275	Bileca, Michael Scott	State Representative, District 115	INT	5678	935	Details
60143	Bodin, Amory	State Representative, District 114	INT	0	933	Details
60267	Bracy, Randolph	State Representative, District 45	INT	0	874	Details
60184	Braynon, Oscar	State Senator, District 36	INT	0	2709	Details
60037	Brutus, Philip J.	State Representative, District 107	INT	25	829	Details
60092	Campbell, Daphne	State Representative, District 108	INT	10	876	Details
60226	Cortes, Robert	State Representative, District 30	INT	0	1006	Details
60237	Cynamon, Abby	Circuit Judge, Circuit 11 Group 50	REC	0	13139	Details
60167	Dentel, Karen Castor	State Representative, District 30	INT	0	1006	Details
60102	Devine, Timothy Michael	Governor	INT	620	119345	Details
54957	Gibson, Kyle Chaderwick	Governor	INT	5890	119345	Details
60061	Lipner, Ryan Adam	Governor	INT	303	119345	Details
60255	Smith, Joseph	Governor	INT	0	119345	Details
55730	Sprowls, Chris	State Representative, District 65	INT	0	1165	Details
60257	Trujillo, Carlos	State Representative, District 105	INT	0	694	Details
60248	Zilber, Martin	Circuit Judge, Circuit 11 Group 58	INT	0	13139	Details
60211	Zimmerman, Carl Frederic	State Representative, District 102	INT	11	964	Details

MENU OPTIONS:

- **Petitioning:** Displays candidates who have elected to qualify by petitions.
- **Petitioning By Random Sampling:** Displays candidates who have elected to qualify by random sampling.
- **Non-Petitioning:** Displays candidates who are not qualifying by petition or have not declared that they wish to qualify by petition.

HEADINGS:

- **Account:** Displays the account number assigned by the Division of Elections.
- **Candidate Name:** Lists candidates in alphabetical order and the office for which they are running.

  INT = The candidate intends to qualify by petition.

  INS = The candidate intends to qualify by random sampling.

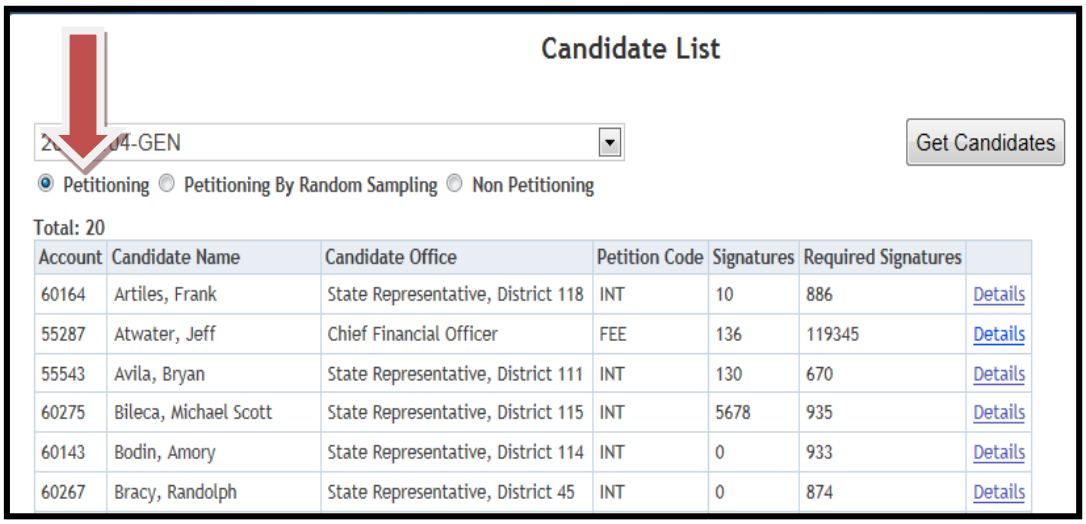
  REC = The candidate received the required number of valid petitions to qualify.

  FEE = The candidate paid the qualifying fee.

- **Candidate Office:** Displays the office and district number (if applicable) for which the candidate has filed to run.
- **Signatures:** Displays the number of valid signatures certified to date.
- **Required Signatures:** Displays the total number of valid signatures needed in order to qualify by petition for the office listed.

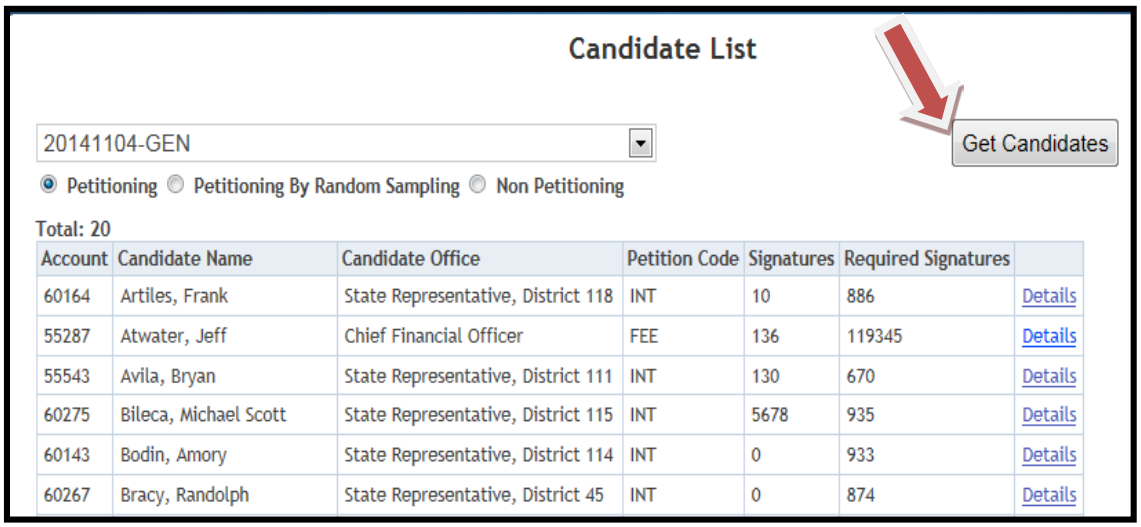
How to Search for a Candidate in Petitioning Status

1. Click the circle next to **Petitioning**.



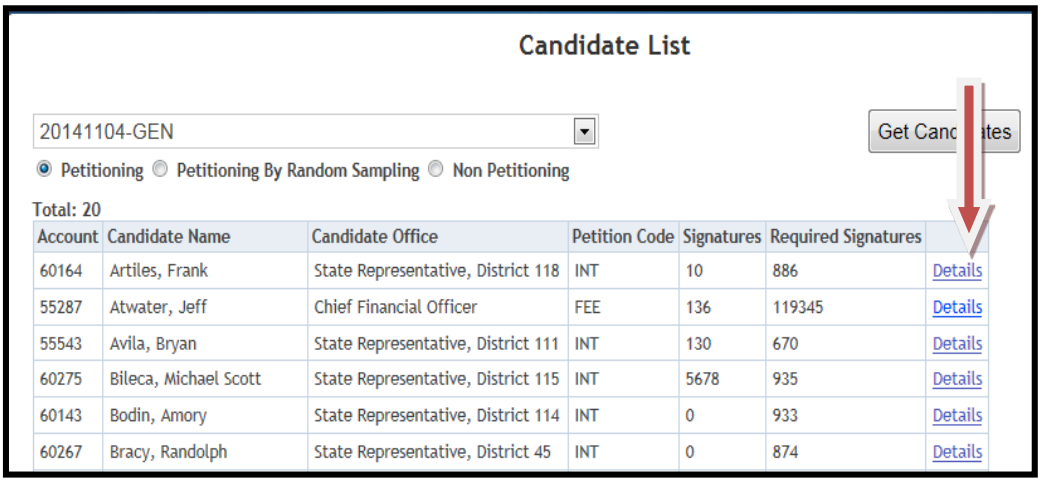
Account	Candidate Name	Candidate Office	Petition Code	Signatures	Required Signatures	
60164	Artiles, Frank	State Representative, District 118	INT	10	886	Details
55287	Atwater, Jeff	Chief Financial Officer	FEE	136	119345	Details
55543	Avila, Bryan	State Representative, District 111	INT	130	670	Details
60275	Bileca, Michael Scott	State Representative, District 115	INT	5678	935	Details
60143	Bodin, Amory	State Representative, District 114	INT	0	933	Details
60267	Bracy, Randolph	State Representative, District 45	INT	0	874	Details

2. Click **Get Candidates**.



Account	Candidate Name	Candidate Office	Petition Code	Signatures	Required Signatures	
60164	Artiles, Frank	State Representative, District 118	INT	10	886	Details
55287	Atwater, Jeff	Chief Financial Officer	FEE	136	119345	Details
55543	Avila, Bryan	State Representative, District 111	INT	130	670	Details
60275	Bileca, Michael Scott	State Representative, District 115	INT	5678	935	Details
60143	Bodin, Amory	State Representative, District 114	INT	0	933	Details
60267	Bracy, Randolph	State Representative, District 45	INT	0	874	Details

3. Click the **Details** link to view additional information on a candidate.



4. Clicking **Details** will bring you to the **Candidate Details** screen.

- **Office:** Displays the current office for which the candidate is running.
- **Party:** Displays the applicable party affiliation of the candidate.
- **Status:** Displays the current filing status of the candidate.
- **Petition Code:**

  INT = The candidate intends to qualify by petition.

  INS = The candidate intends to qualify by random sampling.

  REC = The candidate received the required number of valid petitions to qualify.

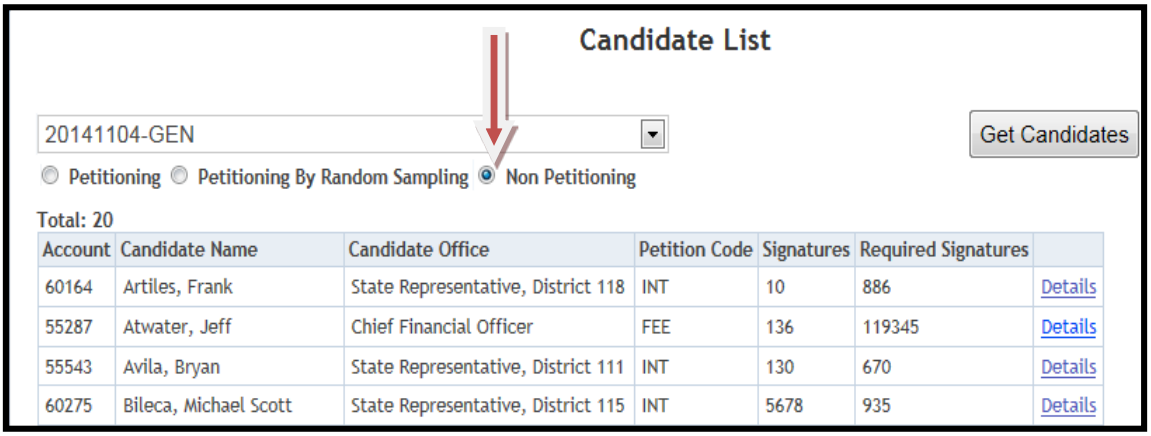
  FEE = The candidate paid the qualifying fee.

- **Undue Burden Effective Date:** Displays the date the candidate filed an Affidavit of Undue Burden with your office.
- **Last Office or Party Change Date:** If a candidate makes an office or party change, the date this occurred will be displayed here in **LARGE RED TYPE**.

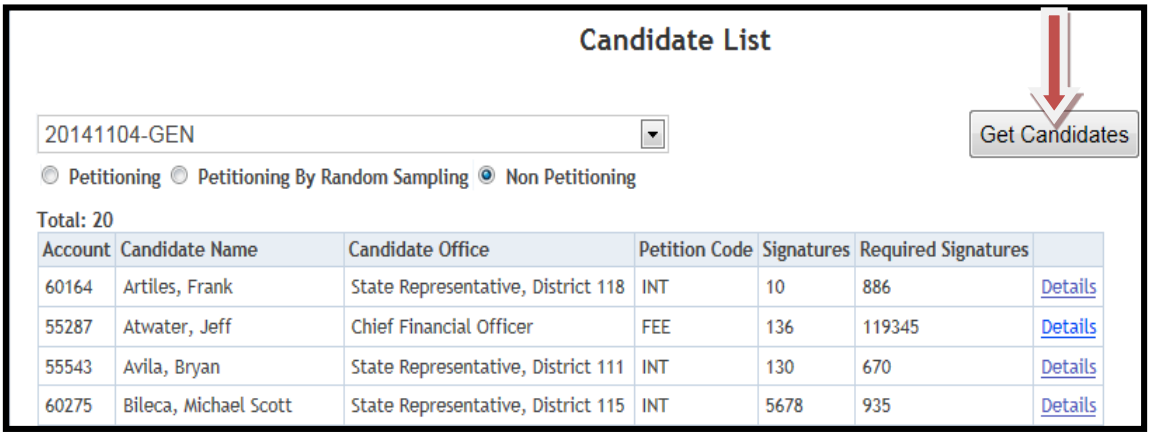
- **Petition Collection Starts:** Displays the earliest date that the candidate can submit petitions for the office shown unless there is a date for Last office or Party Change Date.
- **Petition Collection Ends:** Displays the last date the candidate can submit valid petitions for the office shown.
- **Petition Cert. Ends:** Displays the last date that the Supervisor of Elections can certify valid petitions for the candidate shown.
- **Candidate Petitions Verified:** By using the drop-down arrow and choosing a county (or all counties), you can click **Get Petitions** and view the number of verified petitions for the candidate to date.
- **Back to Candidate List:** Returns you to the **Candidate List** screen.
- **Edit Candidate:** Click this link to change a candidate from **Non-Petitioning** to **Petitioning** and to enter the date the Affidavit of Undue Burden was filed.
- **Add New Petition:** Click this link to enter valid and invalid petitions.

How to Search for a Candidate in Non-Petitioning Status

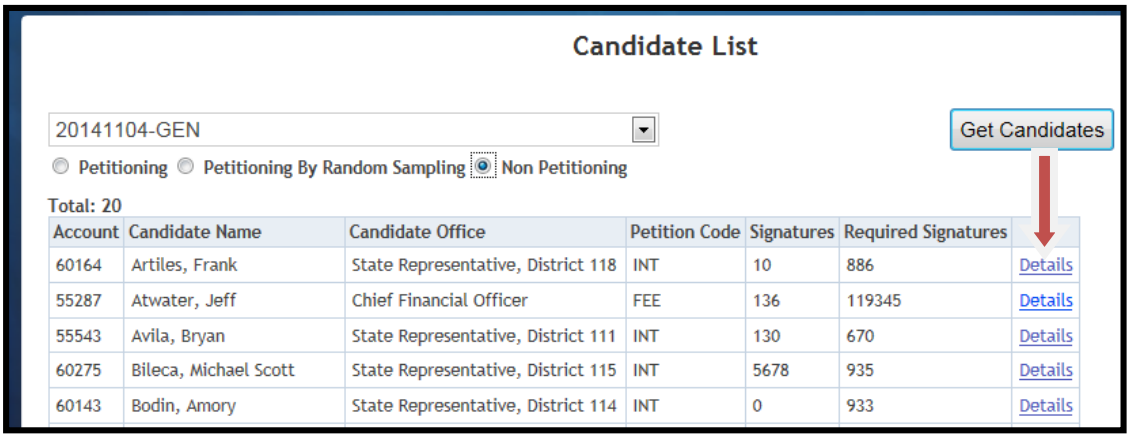
1. Click the circle next to **Non-Petitioning**.



2. Click **Get Candidates**.



3. The candidates who have submitted a Form DS-DE 9 with the Division of Elections, but have not indicated their intent to qualify by the petition method, will appear in alphabetical order. Click the **Details** link to view additional information on a candidate.



Account	Candidate Name	Candidate Office	Petition Code	Signatures	Required Signatures	
60164	Artiles, Frank	State Representative, District 118	INT	10	886	Details
55287	Atwater, Jeff	Chief Financial Officer	FEE	136	119345	Details
55543	Avila, Bryan	State Representative, District 111	INT	130	670	Details
60275	Bileca, Michael Scott	State Representative, District 115	INT	5678	935	Details
60143	Bodin, Amory	State Representative, District 114	INT	0	933	Details

4. Clicking **Details** will bring you to the **Candidate Details** screen.

- **Office:** Displays the current office for which the candidate is running.

- **Party:** Displays the applicable party affiliation of the candidate.

- **Status:** Displays the current filing status of the candidate.

- **Petition Code:**

  INT = The candidate intends to qualify by petition.

  INS = The candidate intends to qualify by random sampling.

  REC = The candidate received the required number of valid petitions to qualify.

  FEE = The candidate paid the qualifying fee.

- **Undue Burden Effective Date:** Displays the date the candidate filed an Affidavit of Undue Burden.

- **Last Office or Party Change Date:** If a candidate makes an office or party change, the date this occurred will be displayed here in **LARGE RED TYPE**.

- **Petition Collection Starts:** Displays the earliest date that the candidate can submit valid petitions for the office shown unless there is a date for Last office or Party Change Date.

- **Petition Collection Ends:** Displays the last date the candidate can submit valid petitions for the office shown (if the candidate decides to collect petitions).

- **Petition Cert. Ends:** Displays the last date that the Supervisor of Elections can certify valid petitions for the candidate shown (if the candidate decides to collect petitions).

- **Back to Candidate List:** Returns you to the **Candidate List** screen.

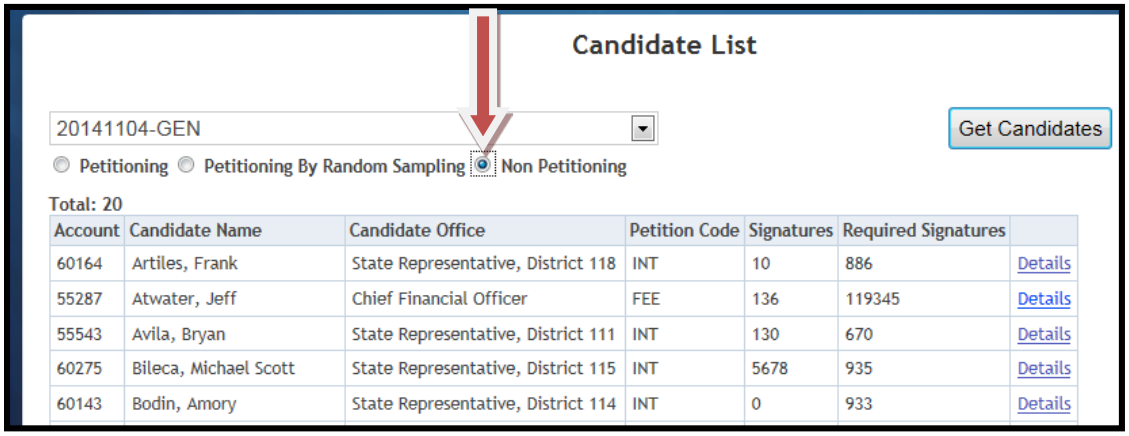
- **Edit Candidate:** Click this link to change a candidate from **Non-Petitioning** to **Petitioning** and to enter the date the Affidavit of Undue Burden was filed.

- **Candidate Petitions Verified:** Because this is a **Non-Petitioning** candidate, the display should read **There are no Petition records to display**.

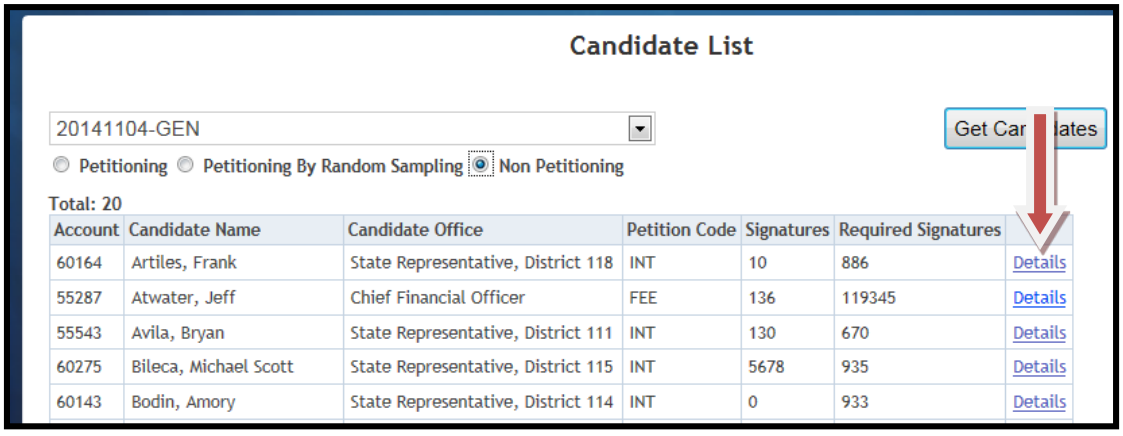
How to Change a Candidate from Non-Petitioning to Petitioning Status

1. If you receive petitions from a candidate who is not already listed on the **Petitioning** list, you will need to change the candidate's status from **Non-Petitioning** to **Petitioning**. **NOTE**: If the candidate is opting to do random sampling, then you will need to contact the Division so it can set the appropriate status and notify all counties involved.

2. On the **Candidate List** screen, click the option for **Non-Petitioning** then click on the **Get Candidates** button.



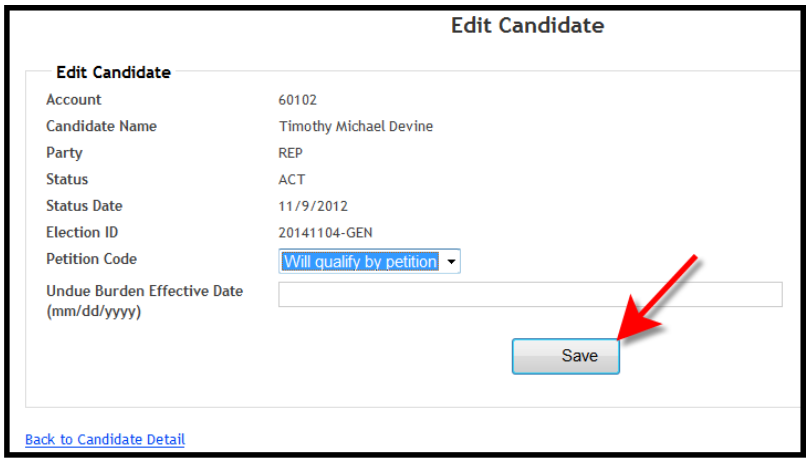
3. Click the **Details** link next to the candidate you want to change to **Petitioning**.



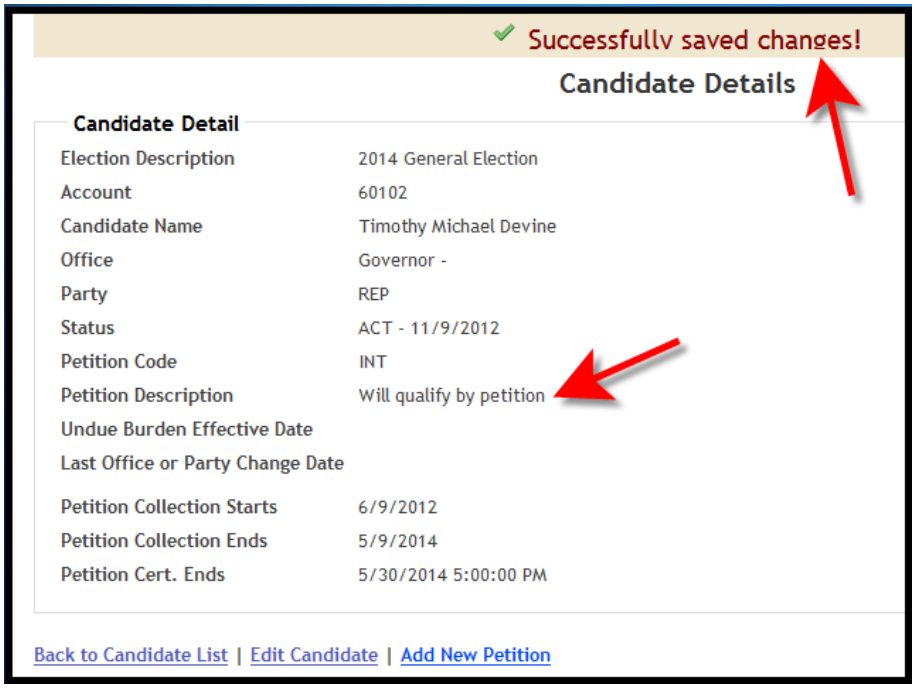
4. Click **Edit Candidate**.

5. Next to **Petition Code**, use the drop-down arrow and choose **Will qualify by petition**. **IMPORTANT:** If the candidate has also filed an Affidavit of Undue Burden with your office, enter the date the Affidavit was filed next to **Undue Burden Effective Date (mm/dd/yyyy)**.

6. Click **Save**.

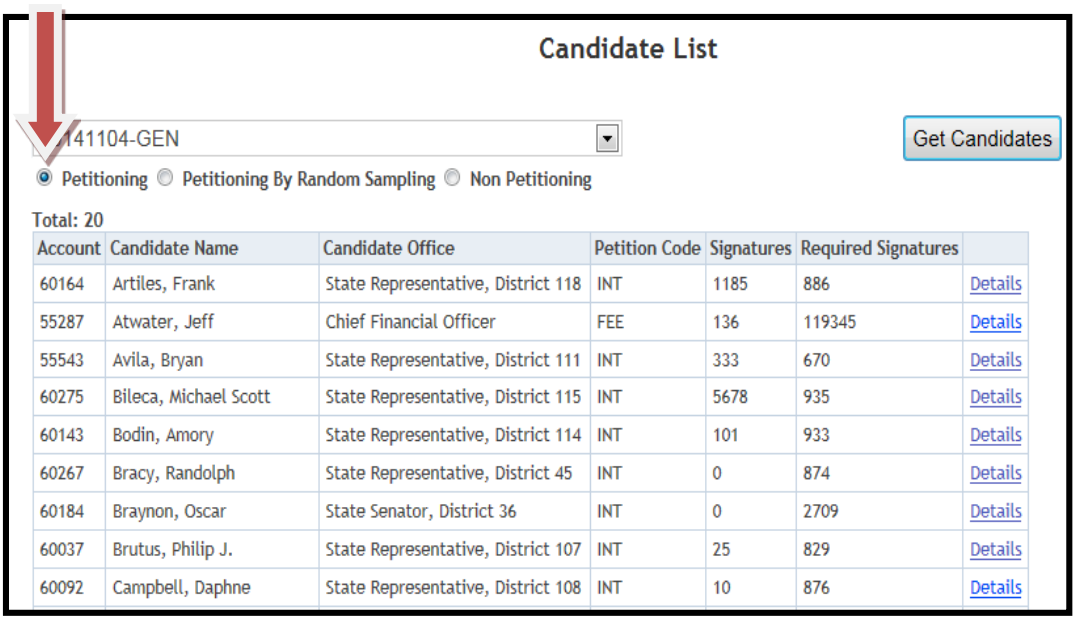


7. If the status change was successful, **"Successfully saved changes!"** will appear at the top of the screen and the **Petition Description** will state **Will qualify by petition**. This will also move the candidate from the **Non-Petitioning** list to the **Petitioning** list.



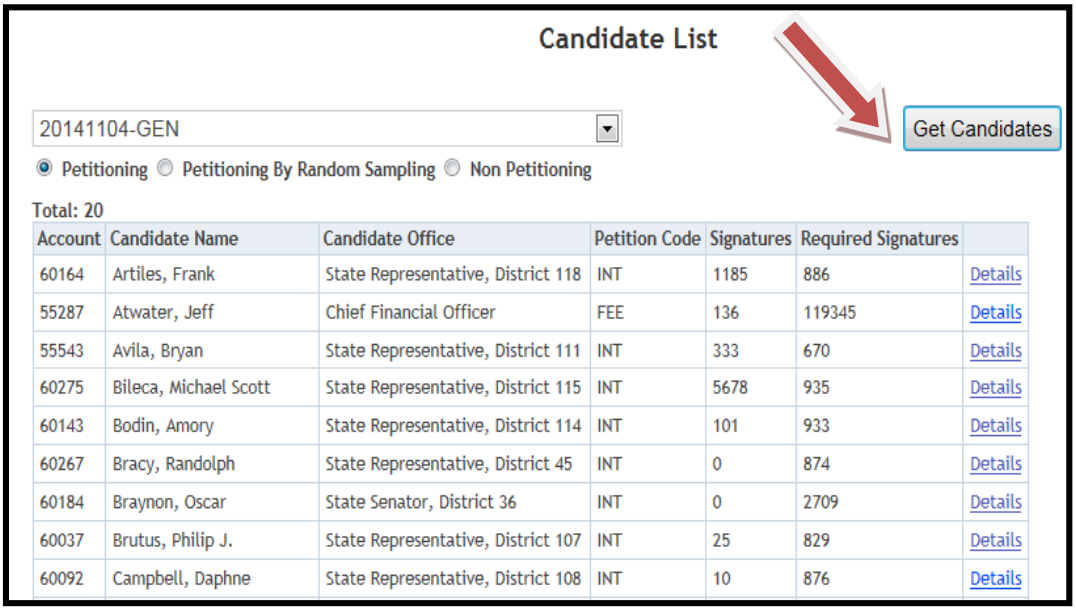
How to Enter an Affidavit of Undue Burden

1. Click the circle next to **Petitioning**.



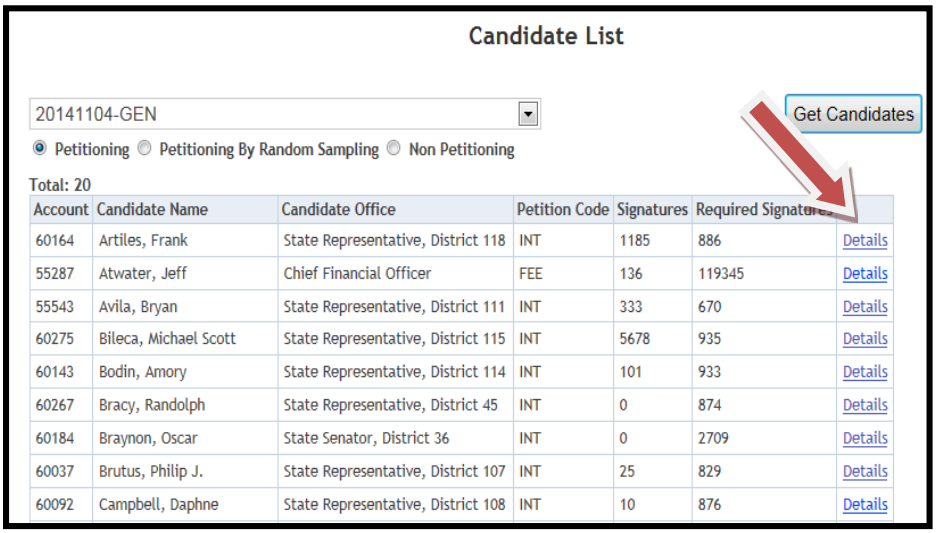
Account	Candidate Name	Candidate Office	Petition Code	Signatures	Required Signatures	
60164	Artiles, Frank	State Representative, District 118	INT	1185	886	Details
55287	Atwater, Jeff	Chief Financial Officer	FEE	136	119345	Details
55543	Avila, Bryan	State Representative, District 111	INT	333	670	Details
60275	Bileca, Michael Scott	State Representative, District 115	INT	5678	935	Details
60143	Bodin, Amory	State Representative, District 114	INT	101	933	Details
60267	Bracy, Randolph	State Representative, District 45	INT	0	874	Details
60184	Braynon, Oscar	State Senator, District 36	INT	0	2709	Details
60037	Brutus, Philip J.	State Representative, District 107	INT	25	829	Details
60092	Campbell, Daphne	State Representative, District 108	INT	10	876	Details

2. Click **Get Candidates**.



Account	Candidate Name	Candidate Office	Petition Code	Signatures	Required Signatures	
60164	Artiles, Frank	State Representative, District 118	INT	1185	886	Details
55287	Atwater, Jeff	Chief Financial Officer	FEE	136	119345	Details
55543	Avila, Bryan	State Representative, District 111	INT	333	670	Details
60275	Bileca, Michael Scott	State Representative, District 115	INT	5678	935	Details
60143	Bodin, Amory	State Representative, District 114	INT	101	933	Details
60267	Bracy, Randolph	State Representative, District 45	INT	0	874	Details
60184	Braynon, Oscar	State Senator, District 36	INT	0	2709	Details
60037	Brutus, Philip J.	State Representative, District 107	INT	25	829	Details
60092	Campbell, Daphne	State Representative, District 108	INT	10	876	Details

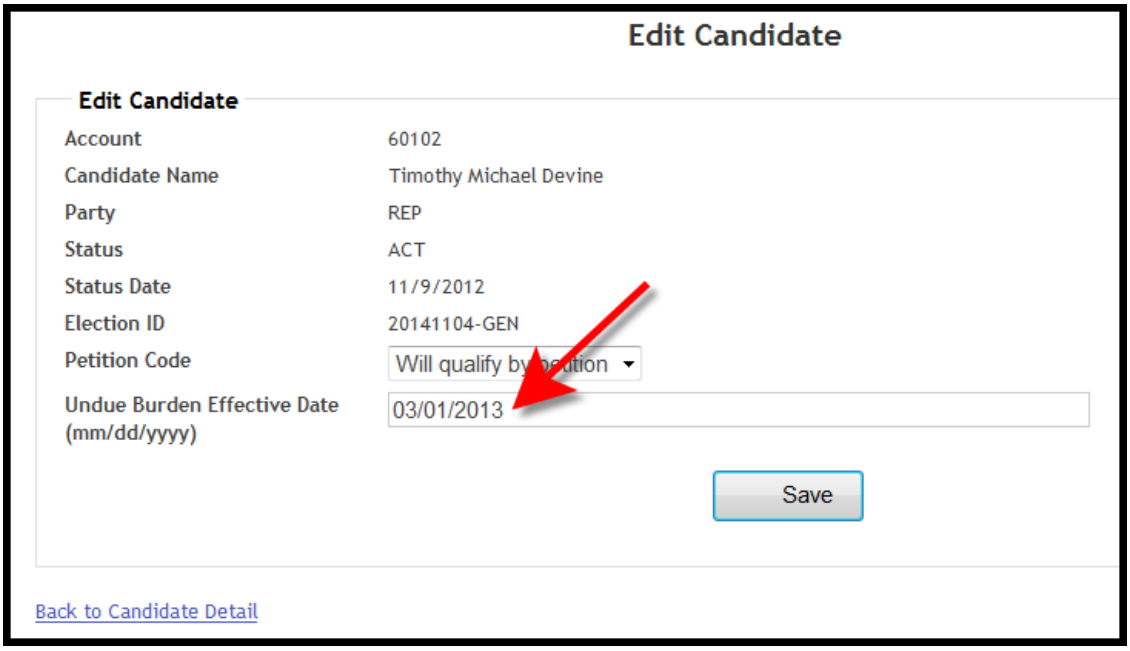
3. Click the **Details** link next to the candidate.



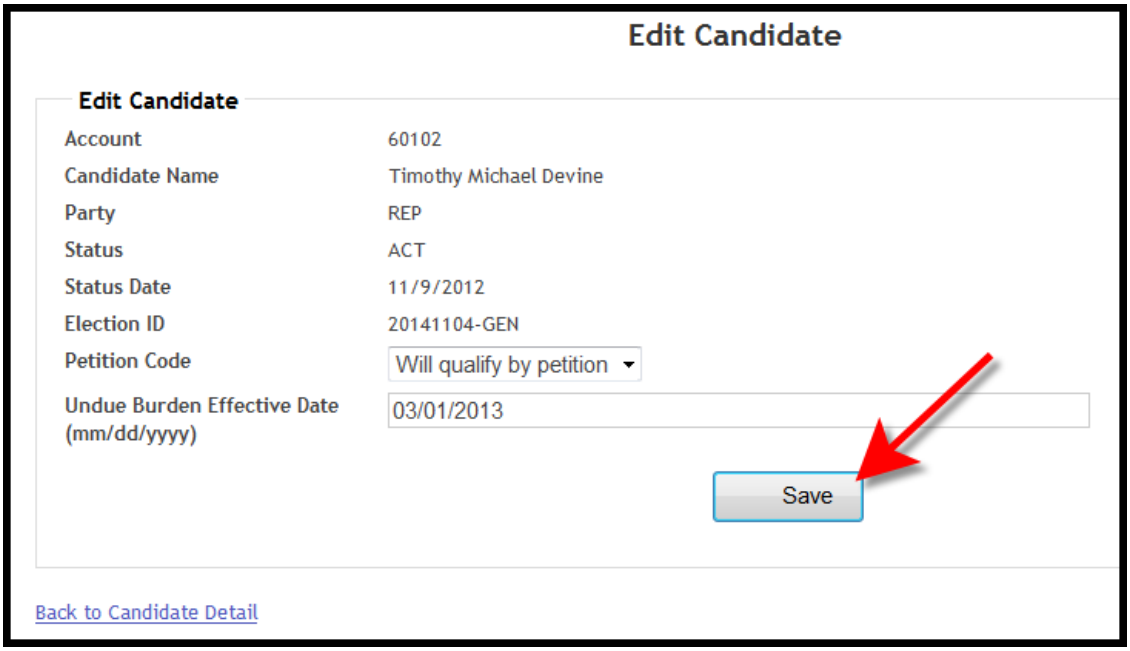
Account	Candidate Name	Candidate Office	Petition Code	Signatures	Required Signatures	
60164	Artiles, Frank	State Representative, District 118	INT	1185	886	Details
55287	Atwater, Jeff	Chief Financial Officer	FEE	136	119345	Details
55543	Avila, Bryan	State Representative, District 111	INT	333	670	Details
60275	Bileca, Michael Scott	State Representative, District 115	INT	5678	935	Details
60143	Bodin, Amory	State Representative, District 114	INT	101	933	Details
60267	Bracy, Randolph	State Representative, District 45	INT	0	874	Details
60184	Braynon, Oscar	State Senator, District 36	INT	0	2709	Details
60037	Brutus, Philip J.	State Representative, District 107	INT	25	829	Details
60092	Campbell, Daphne	State Representative, District 108	INT	10	876	Details

4. Click **Edit Candidate**.

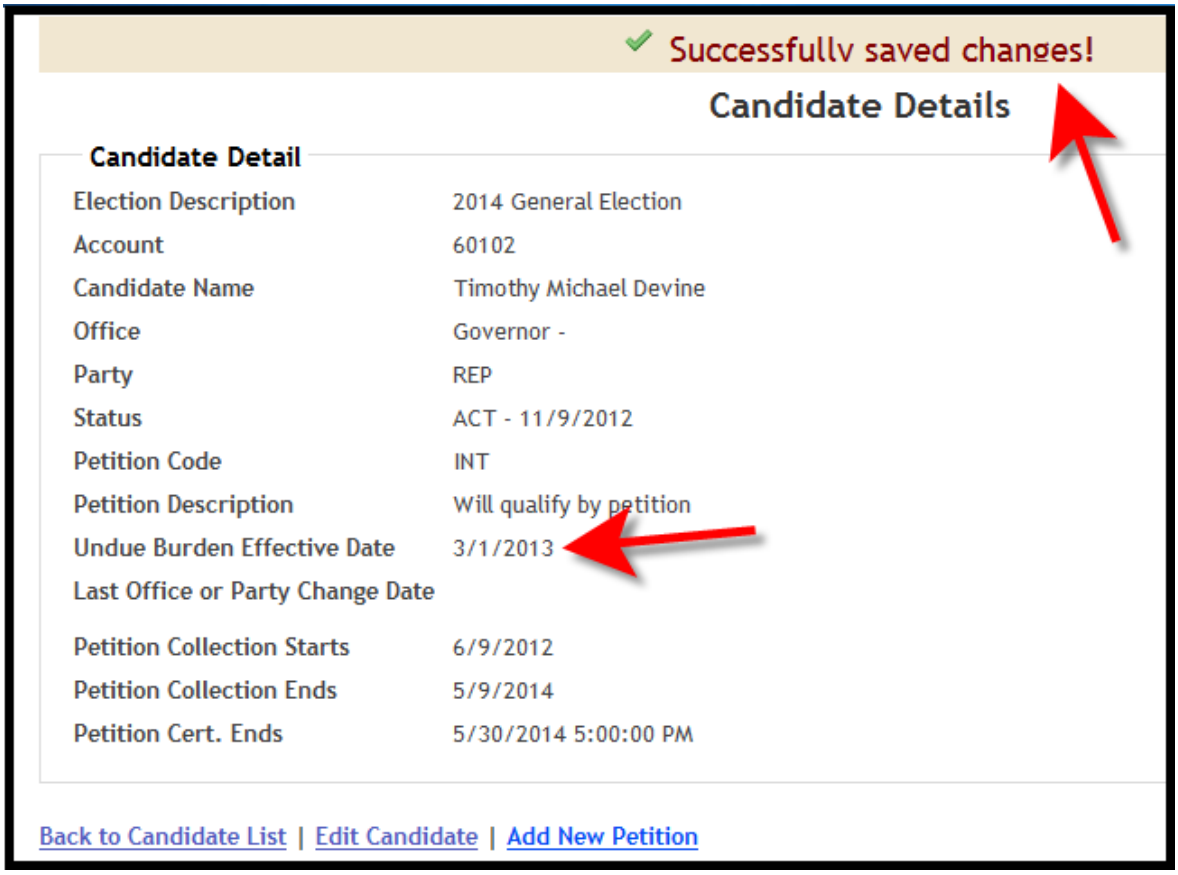
5. Next to **Undue Burden Effective Date (mm/dd/yyyy)**, enter the date the Affidavit of Undue Burden was filed with your office.



6. Click **Save**.



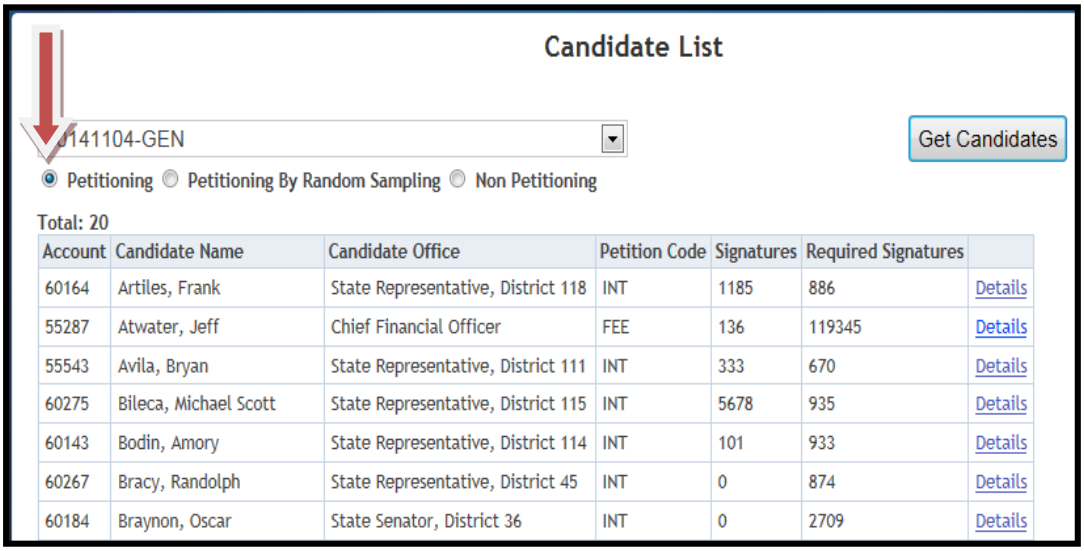
7. If the change was successful, "**Successfully saved changes!"** will appear at the top of the screen and the **Undue Burden Effective Date** will show the date you entered.



How to Enter Valid and Invalid Petitions

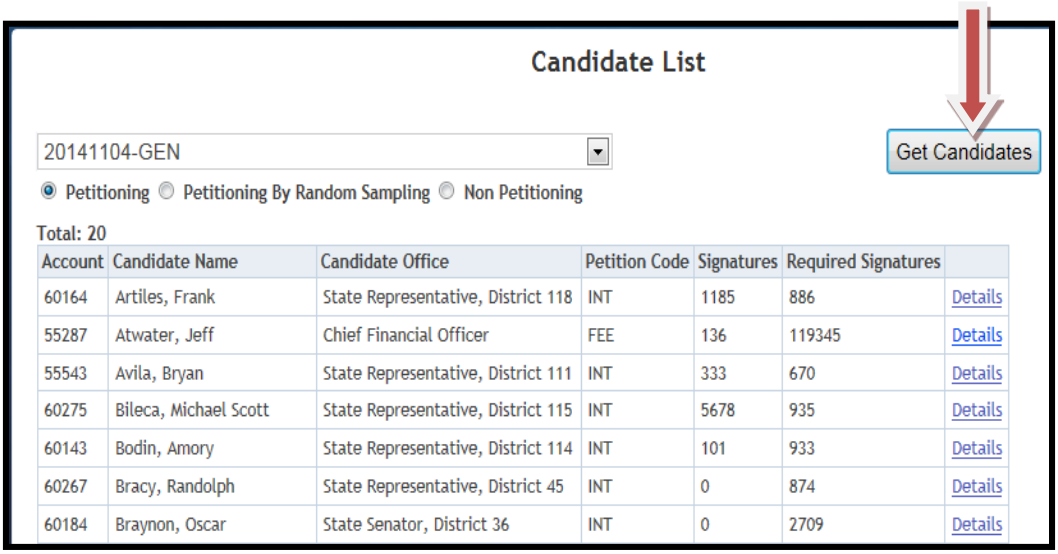
IMPORTANT: Please remember that you must record not only the number of valid petitions verified, but also the number of invalid petitions verified.

1. Click the circle next to **Petitioning**.



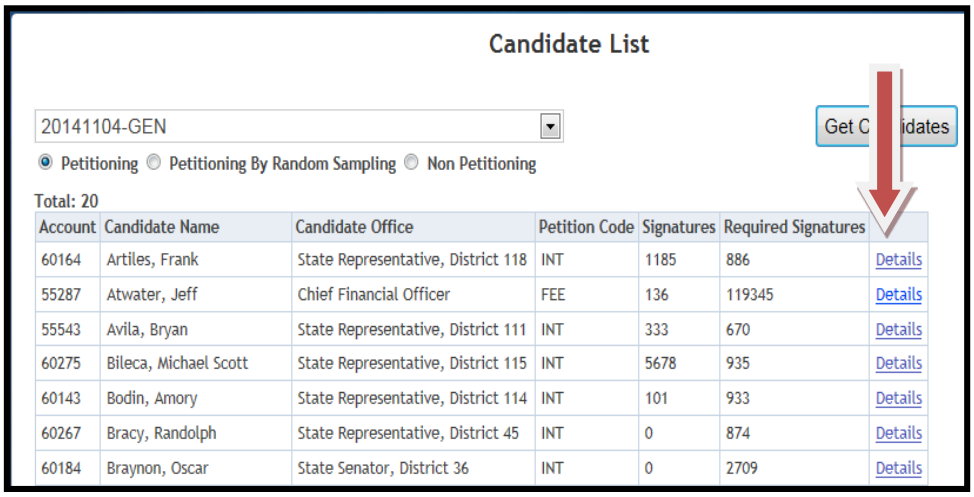
Account	Candidate Name	Candidate Office	Petition Code	Signatures	Required Signatures	
60164	Artiles, Frank	State Representative, District 118	INT	1185	886	Details
55287	Atwater, Jeff	Chief Financial Officer	FEE	136	119345	Details
55543	Avila, Bryan	State Representative, District 111	INT	333	670	Details
60275	Bileca, Michael Scott	State Representative, District 115	INT	5678	935	Details
60143	Bodin, Amory	State Representative, District 114	INT	101	933	Details
60267	Bracy, Randolph	State Representative, District 45	INT	0	874	Details
60184	Braynon, Oscar	State Senator, District 36	INT	0	2709	Details

2. Click **Get Candidates**.



Account	Candidate Name	Candidate Office	Petition Code	Signatures	Required Signatures	
60164	Artiles, Frank	State Representative, District 118	INT	1185	886	Details
55287	Atwater, Jeff	Chief Financial Officer	FEE	136	119345	Details
55543	Avila, Bryan	State Representative, District 111	INT	333	670	Details
60275	Bileca, Michael Scott	State Representative, District 115	INT	5678	935	Details
60143	Bodin, Amory	State Representative, District 114	INT	101	933	Details
60267	Bracy, Randolph	State Representative, District 45	INT	0	874	Details
60184	Braynon, Oscar	State Senator, District 36	INT	0	2709	Details

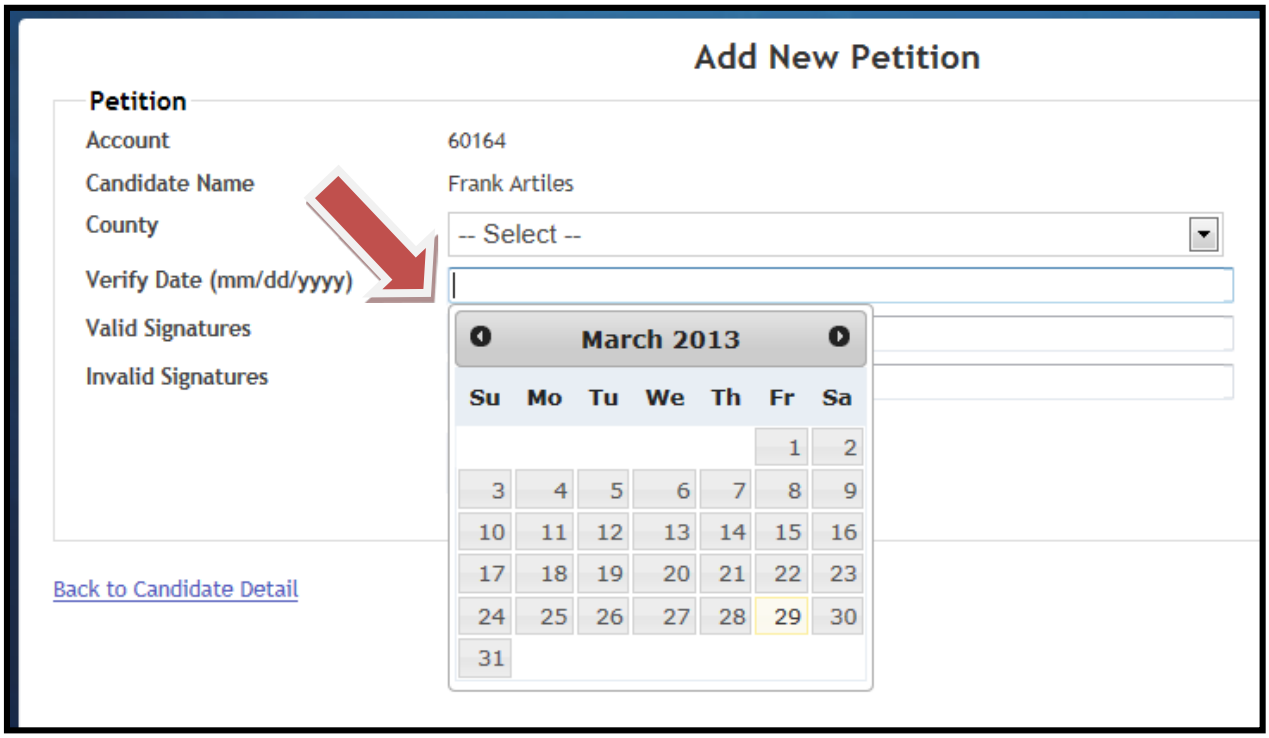
3. Click the **Details** link next to the candidate.



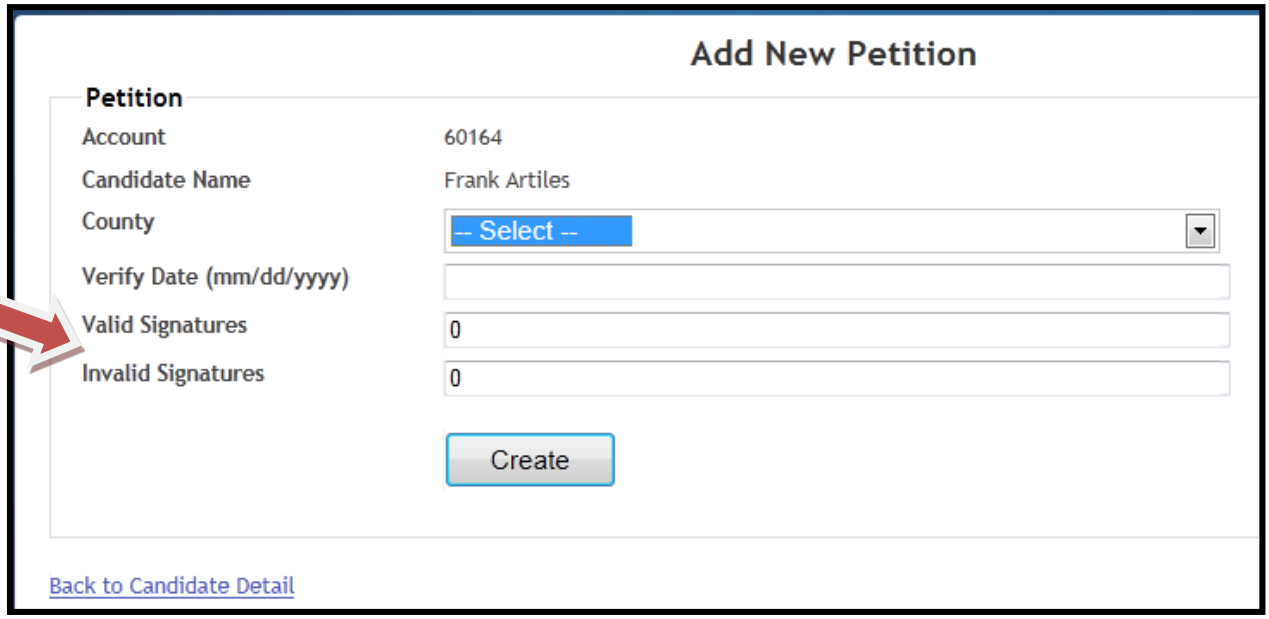
4. Click **Add New Petition**.

5. Next to **County**, your county name will be pre-populated.

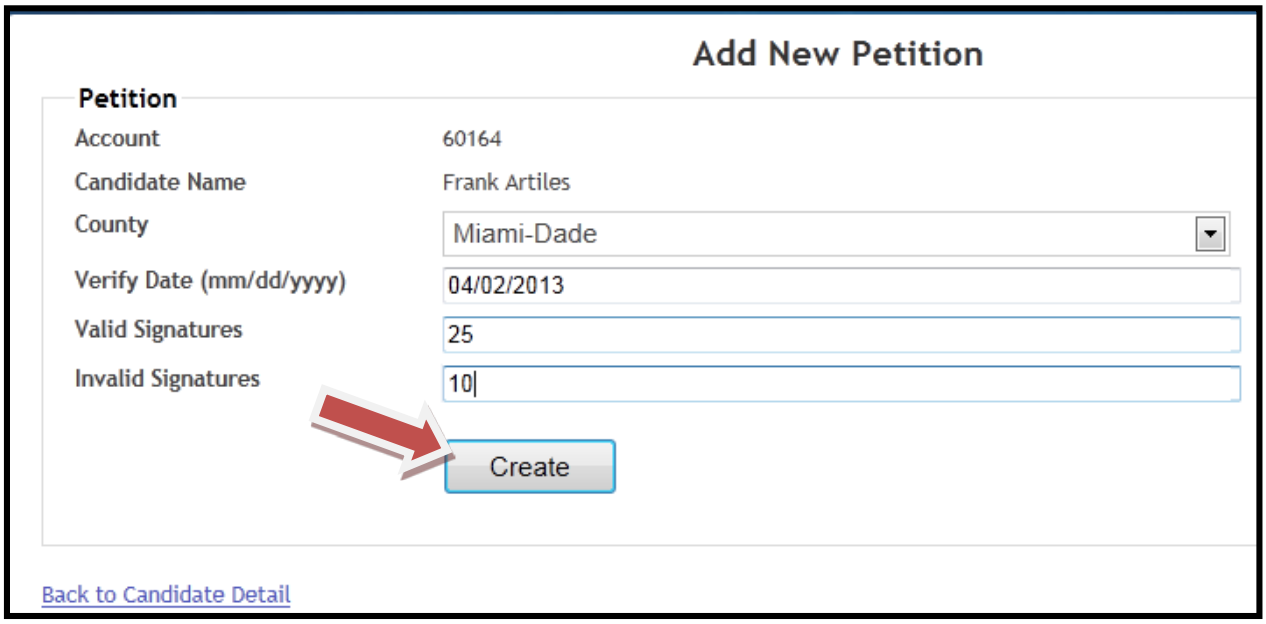
6. Next to **Verify Date (mm/dd/yyyy)**, select the date you verified the petitions.



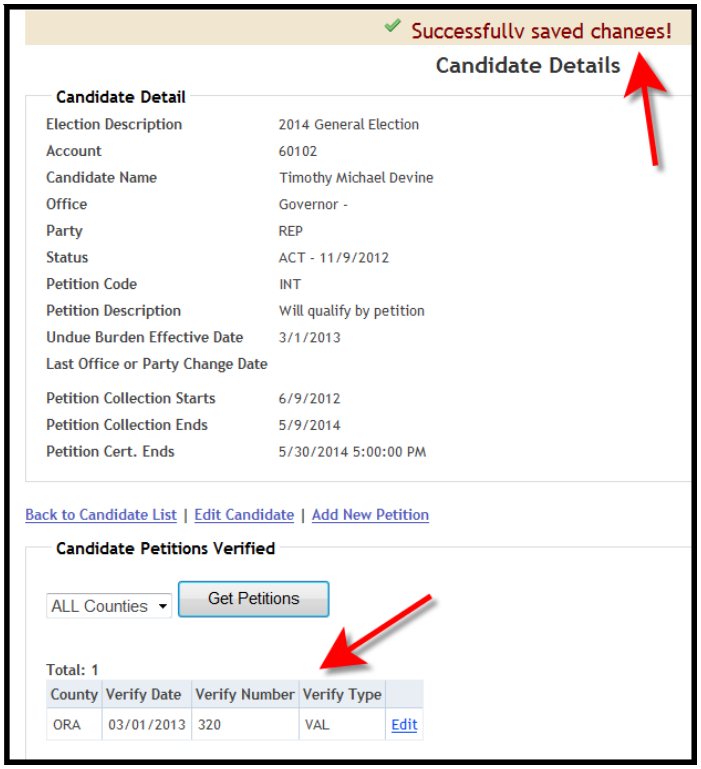
7. Next to **Valid and Invalid Signatures**, enter the amount of appropriate signatures for each respective category.



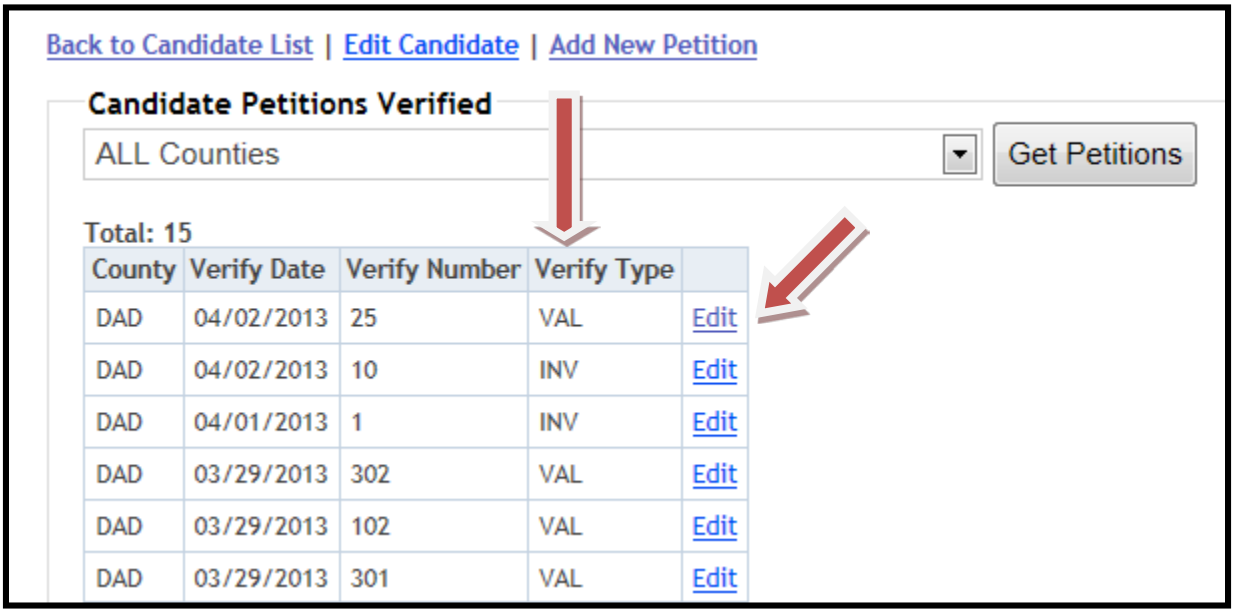
8. Click **Create**.



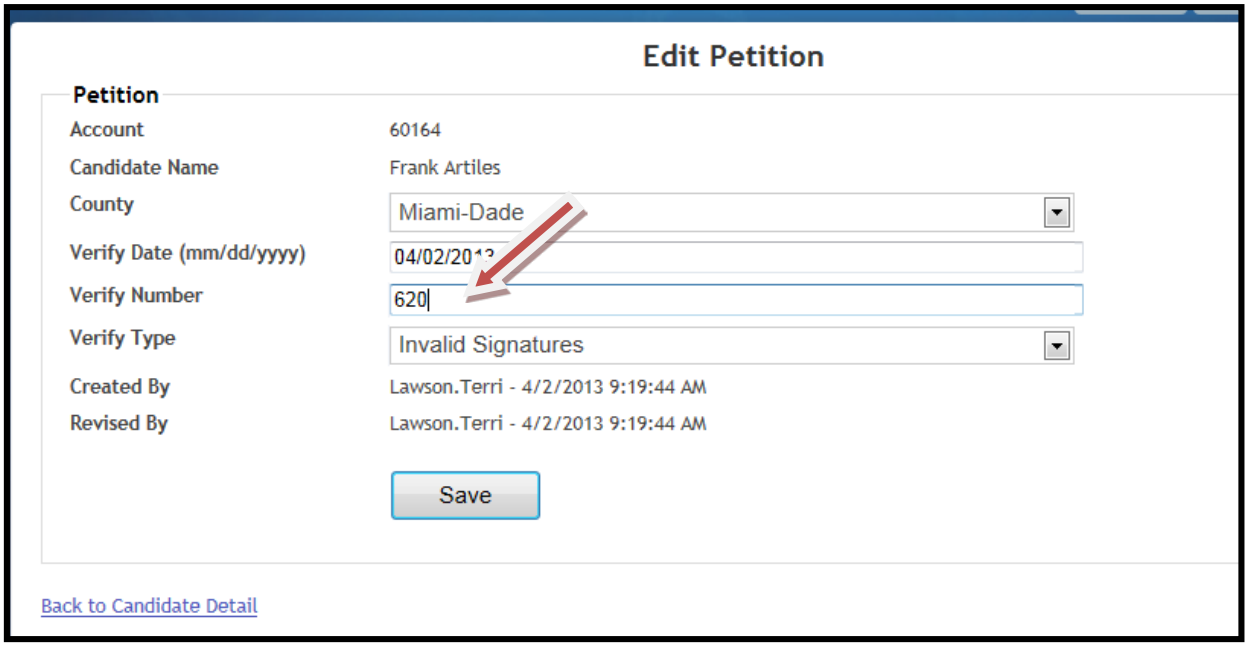
9. If the entry was successful, **"Successfully saved changes!"** will appear at the top of the screen, and the total verified will be added to the table at the bottom of the screen.



10. If you need to edit the information previously entered, click **Edit next to the appropriate Verify Type (valid or invalid)**.

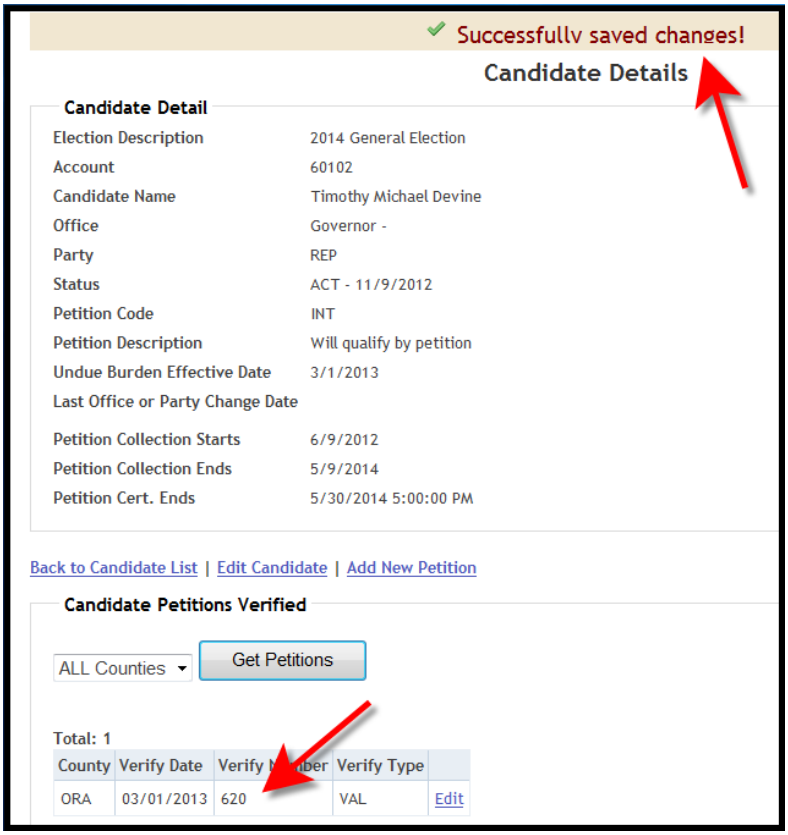


11. Make the necessary changes.



12. Click **Save**.

13. If the change was successful, **"Successfully saved changes!"** will appear at the top of the screen, and the table will reflect the changes made.



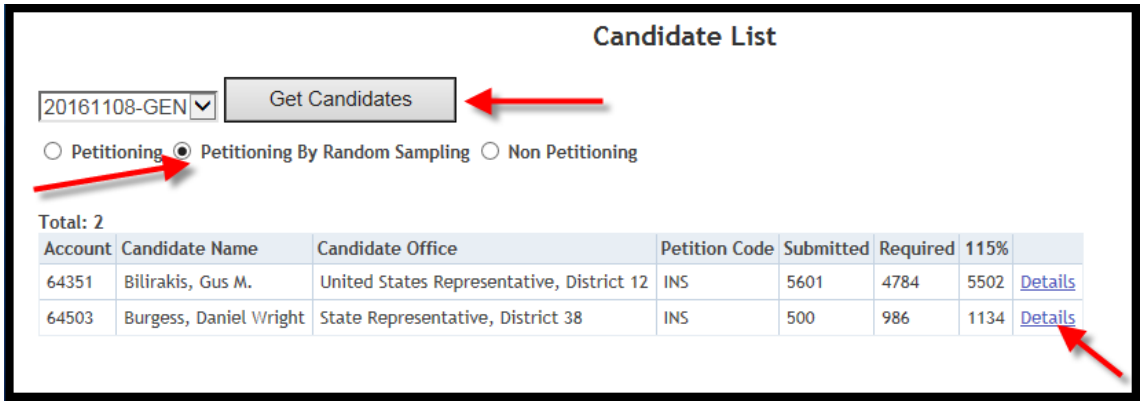
14. Once you have entered and saved all the data in the database and are ready to exit, click on the **Exit** button.

15. After clicking on the **Exit** button, two options will be presented (as shown below)---- **Exit this application and return to SOE Administrative Services** and **Exit this application and Sign out of Windows Live**. Click on desired option.

Candidates Qualifying by Random Sampling

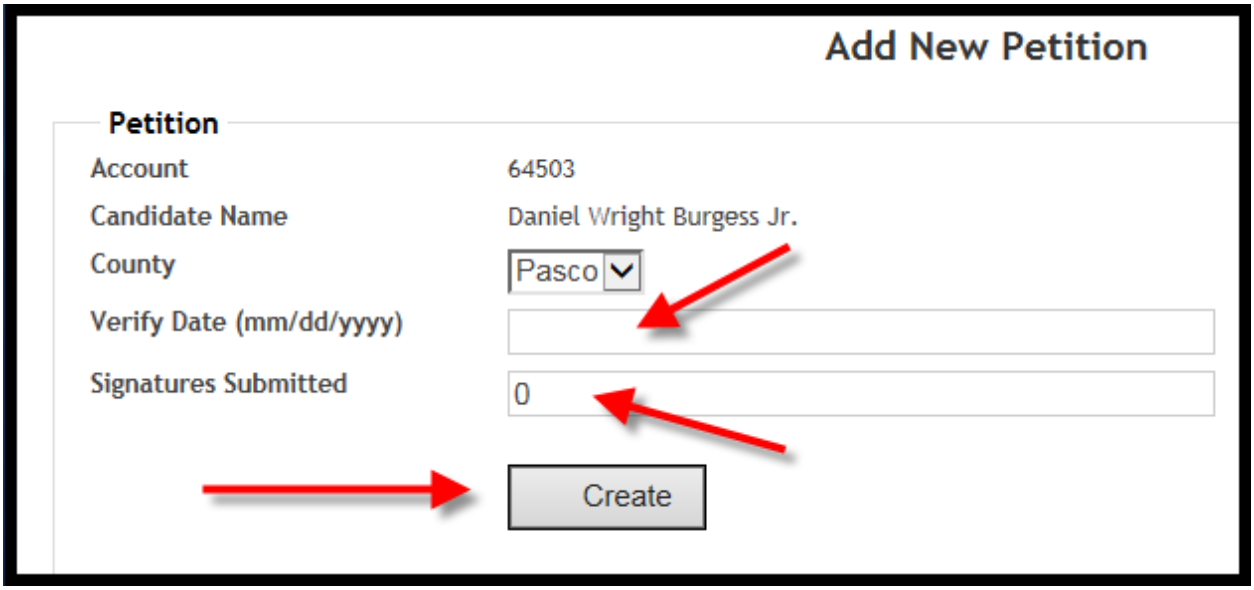
Single County Candidates

1. To view the list of Petitioning By Random Sample candidates, highlight the circle button by **Petitioning By Random Sampling** then click **Get Candidates**. Select the candidate for which data needs to be entered by clicking on the **Details** link.



2. To add new petitions for the selected candidate, click on **Add New Petition**.

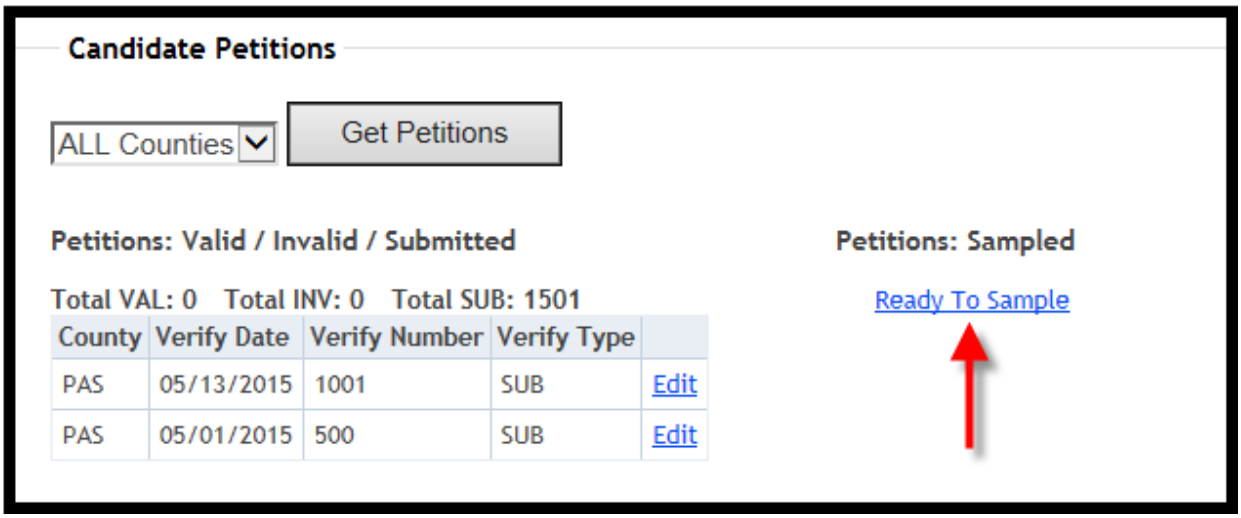
3. Click on the empty box next to Verify Date (mm/dd/yyyy) and select appropriate date. Enter to the number of signatures submitted by the candidate in the line titled **Verify Number**. Click on **Create** when finished.



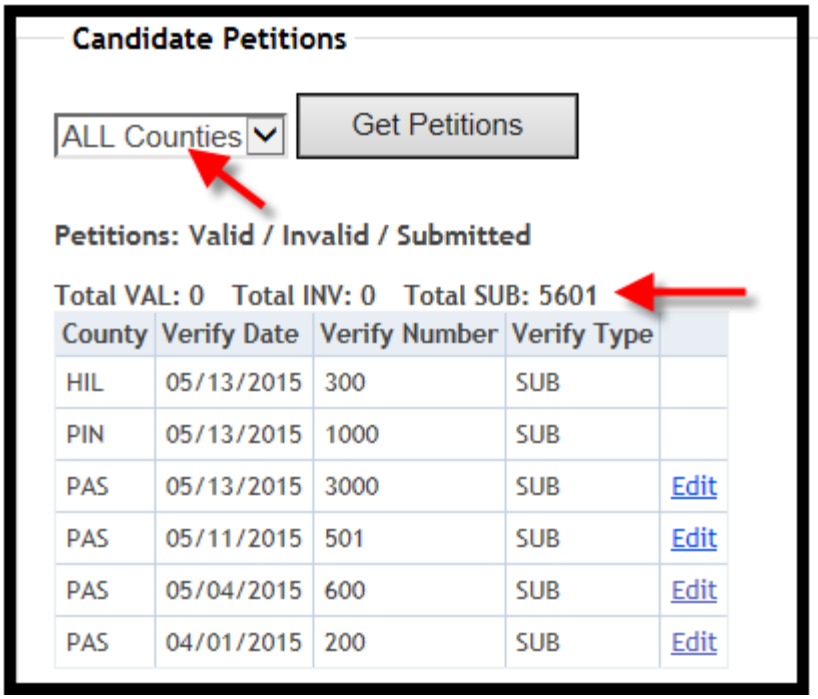
This will take you back to the **Candidate Details** page. Until the required number of signatures have been submitted, the system will indicate "Not Ready To Sample."

Repeat step 3 for each new petition batch.

4. Once the required number of petitions have been received/entered, you will see "**Ready to Sample**." Click on "**Ready to Sample**."

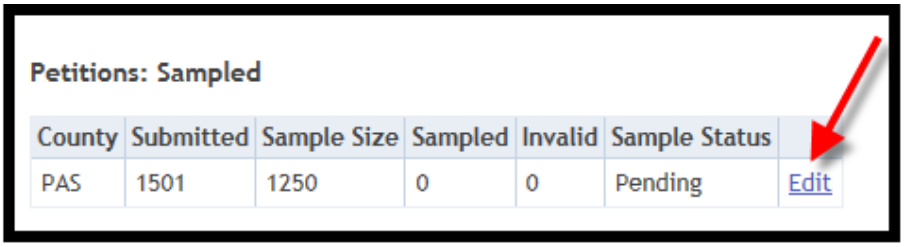


5. You will then see a list of all counties for this candidate and the total number of submitted petitions.



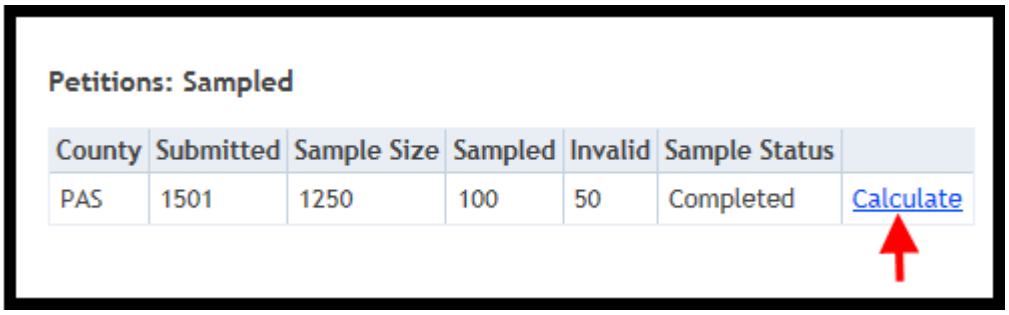
6. Click in the boxes verifying that you have contacted the candidate and that all petitions have been entered in the system. Click on **Create Sample**.

7. Click on **Edit**.

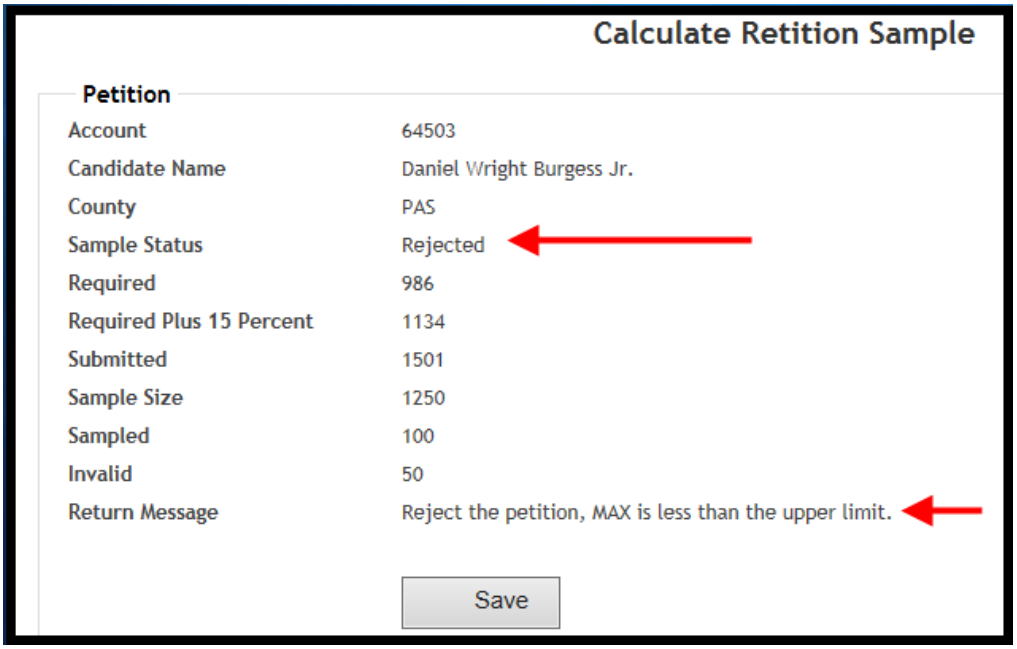


8. For single county candidates, each sample size will be 100. Verify the 100 signatures and enter the number of invalid petitions within the sample. Click on **Save**.

9. Click on **Calculate.**



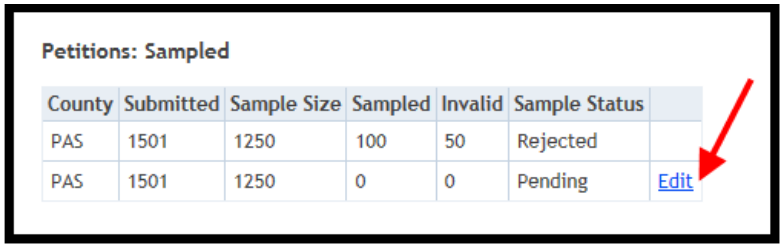
10. The system will determine whether the sample is sufficient or rejected.



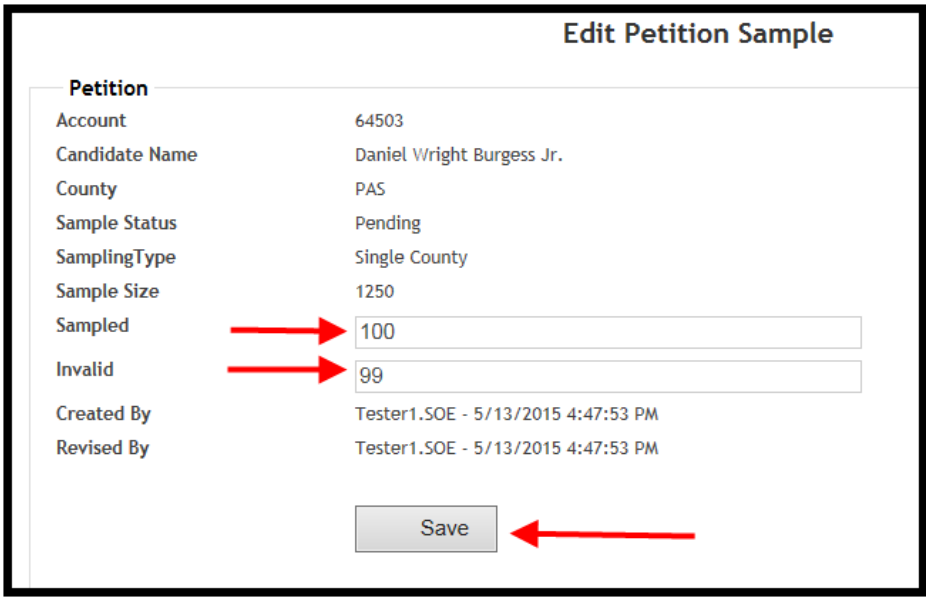
11. Click on Save.

12. If sample was rejected, click on **Ready to Sample**. Click in the boxes verifying that you have contacted the candidate and that all petitions have been entered in the system. Click on **Create Sample**.

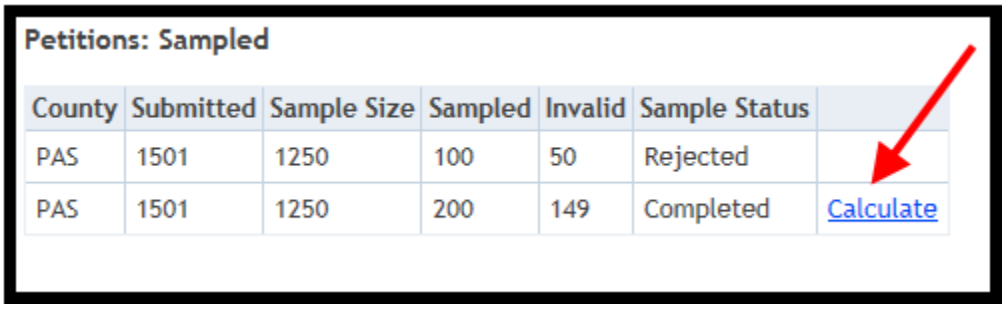
13. Click on **Edit**.



14. Select a new sample size of 100 and enter the number of invalid petitions within the sample. Click on **Save**.



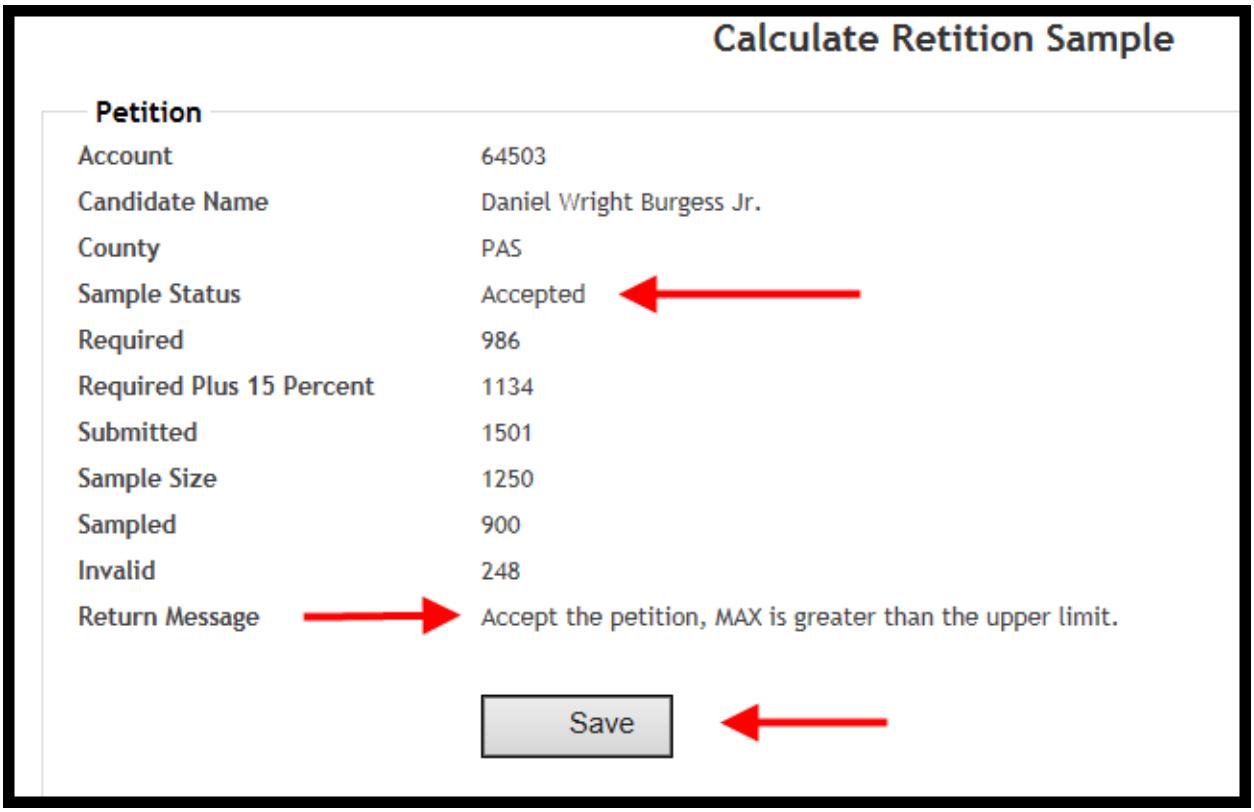
15. Click on **Calculate**.



Petitions: Sampled

County	Submitted	Sample Size	Sampled	Invalid	Sample Status	
PAS	1501	1250	100	50	Rejected	
PAS	1501	1250	200	149	Completed	Calculate

16. Continue to sample in batches of 100 and enter the number of invalid petitions until the sample status changes to "Accepted." Click on Save.



Calculate Retition Sample

Petition

Account	64503
Candidate Name	Daniel Wright Burgess Jr.
County	PAS
Sample Status	Accepted
Required	986
Required Plus 15 Percent	1134
Submitted	1501
Sample Size	1250
Sampled	900
Invalid	248
Return Message	Accept the petition, MAX is greater than the upper limit.

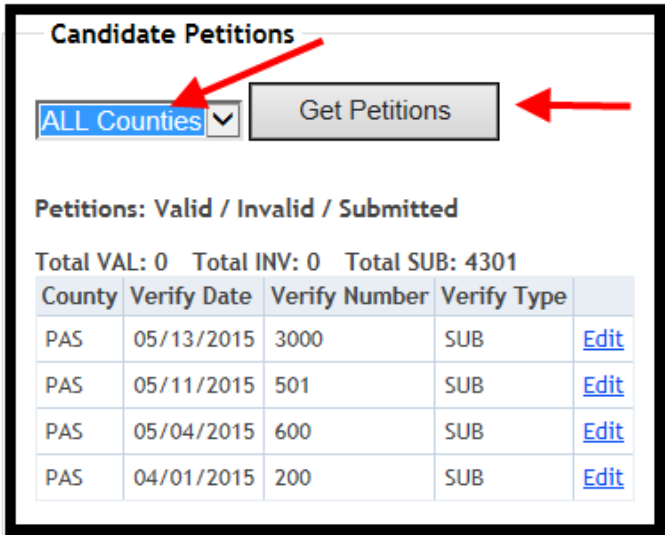
Save

17. Once you have completed sampling, notify the Division that you are finished.

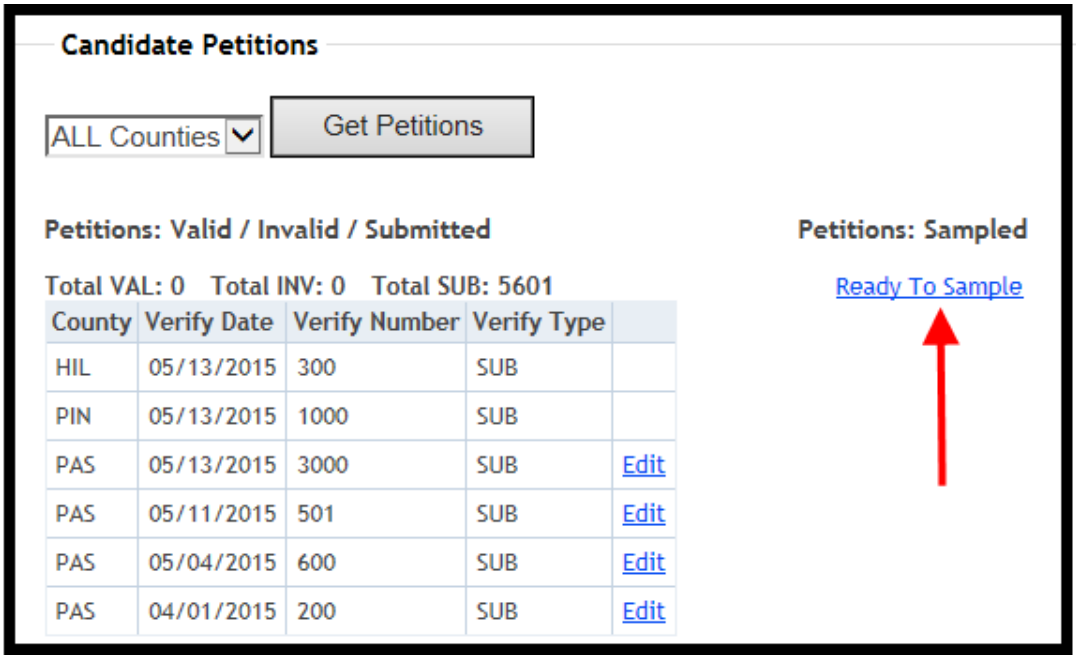
Multi- County Candidates

Follow steps 1 - 4 for single county candidates. Once the appropriate sample size is received, you will be contacted by the Division to let you know to begin the sampling process.

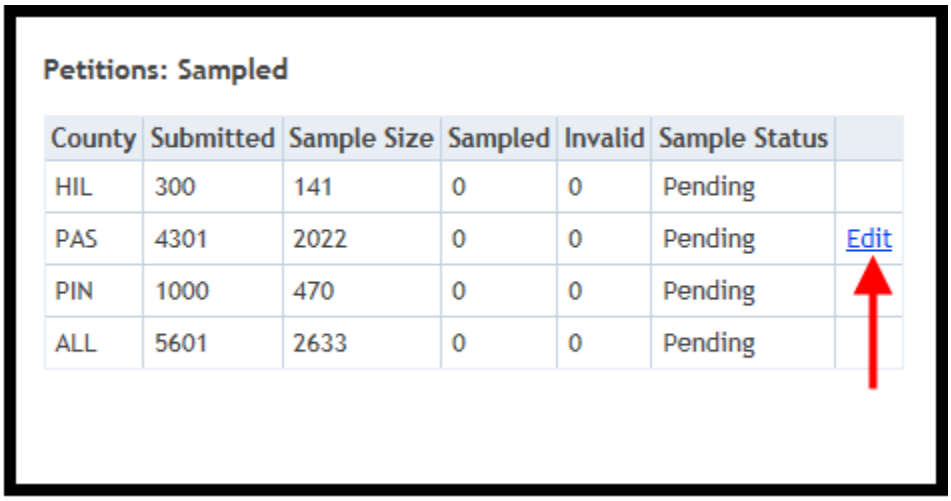
1. Select "All Counties" in the drop-down list and then click on **Get Petitions.**



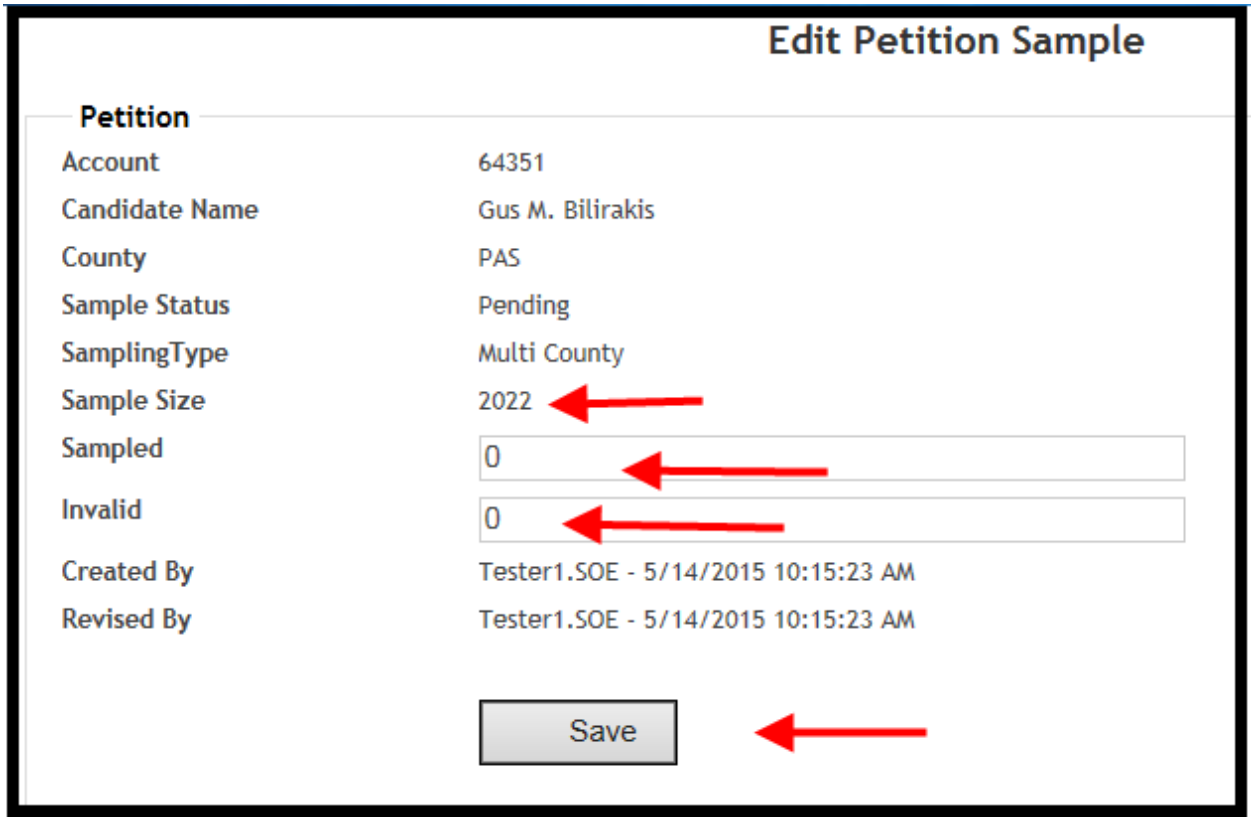
2. You will see petitions from all counties in the district. Click on **Ready to Sample**.



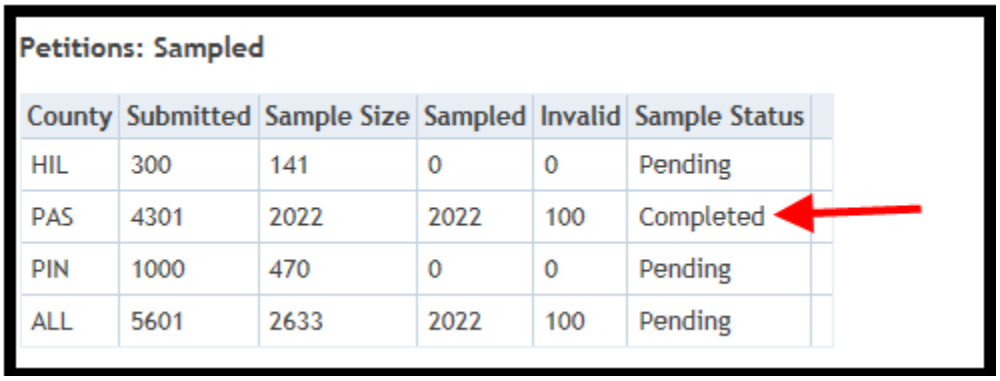
3. Click on **Edit** by your county.



4. The program indicates how many petitions must be sampled. Enter the number in "**Sampled**" field. Enter the number of invalid petitions in the "**Invalid**" field. Click on **Save**.



5. Your **Sample Status** will change to Completed.



Petitions: Sampled

County	Submitted	Sample Size	Sampled	Invalid	Sample Status
HIL	300	141	0	0	Pending
PAS	4301	2022	2022	100	Completed
PIN	1000	470	0	0	Pending
ALL	5601	2633	2022	100	Pending

6. Notify the Division when you have completed your sampling. Once all counties have completed sampling, the Division will notify the candidate whether the petition requirements were met.