

21st Biennial Election Law Seminar For County Chairs



Financing Primary Elections

Setting Up the Primary Fund

All primary funding must be deposited into the party's Primary Fund.

Funds must be kept separate from party contributions.

If the party does not have a Primary Fund, one must be set up.

If the party is unable to open a Primary Fund, the state party can act as fiscal agent.

The state party may, upon request of the chair, accept funding and act as fiscal agent. (TAC §81.136)

Setting Up the Primary Fund

Banks may require a letter of appointment from the state chair.

Use the EIN number to set up the account, *not your social security number*.

The bank account should be styled: “_____ County Democratic/Republican Primary Fund”.

Checks should be issued from the Primary Fund to pay non-contracted primary expenses.

All checks must be printed or stamped with the statement “Void After 180 Days”.



Primary Finance Cycle



Cycle begins November 1st preceding the year of the primary election through the last day of the month of the primary election, or the last day of the month of the runoff election, if applicable.



Primary Estimate payments can be issued beginning November 1st for county parties that submit a primary estimate through the online system – 75% of estimated costs issued ahead of election.



A Runoff Estimate may be submitted, if applicable. The deadline to submit primary estimates is not later than the 45th day before the general primary election, and for a runoff estimate, the 10th day after the general primary election.



Final Cost Reports and supporting documents must be submitted by August 31st.



Primary Finance Overview



Candidates submit application for place on ballot with filing fees to chair.



SOS sends estimate payments to chair once estimate statements are approved.



Filing fees and estimate payments shall be deposited into the party's Primary Fund.



County chair will pay for non-contracted services and items from Primary Fund.



Reimbursable services and items are limited to legally necessary expenses.

Primary Finance Overview (cont'd)



Estimate payments may be requested through online system beginning November 1st.



SOS will provide “pre-populated” figures in the Primary Estimate Statement.



Chairs may edit figures based on expected turnout or change in costs.



It is crucial that supporting documentation is kept organized.

Primary Finance Overview (cont'd)



Voting system vendors, ES&S and Hart, will be paid directly by SOS.



County Election Offices will be paid directly by SOS.



Contracts with County Election Offices should be executed as soon as possible.



Final Cost Reports will include costs from both Primary and Runoff (if applicable).



Final Cost Reports must be submitted by August 31st, 2024.

Contract with County

Meet with County to discuss contract as soon as possible.

Contract shall stipulate which entity will pay for each election cost, e.g. election workers.

For costs not legally reimbursable, contract shall identify which entity will absorb the cost.

Reimbursable Expenses

Any duties required by law
for chair to perform will be
reimbursed.

Parties will also be
reimbursed for
administrative costs up to
cap.

Category Overview



B1 – Ballot Printing



B2 – Programming



B3 – Logic/Accuracy Test Notice



B4 – Tech Support



Category Overview (cont'd)



B5 – Election Kits



B6 – Rental of County-Owned Equipment



B7 – Non-County-Owned Equipment



B8 – Equipment Preparation, Delivery and Receiving



B9 – Polling Location Rental



Category Overview (cont'd)



B10 – Precinct Workers



B11 – Polling Location Delivery Fee



B12 – Central Count Manager



B13 – Tabulation Supervisor



B14 – Assistant Tabulation Supervisor



Category Overview (cont'd)



B15 – Central Count Judges and Clerks



B16 – Early Voting Ballot Board Judges and Clerks



B17 – Provisional/Late Ballot Board Judges and Clerks



B18 – Supplies



Category Overview (cont'd)



B19 – Communication



B20 – Postage



B21 – Legal Fees (Party Only)



B22 – Security



B23 – Other Primary Costs



Category Overview (cont'd)



C1 – Office Rent



C2 – Office Personnel



C3 – Telephone & Utilities



C4 – Office Supplies



C5 - Printing



Category Overview (cont'd)



C6 - Computer



C7 – Bank Fees



E1 – Beginning Bank Balance



E2 – Candidate Filing Fees



F1 – Contributions



Polling Location Rental

Public Buildings:
No rental fees.

Public Buildings:
No custodial/utility fees.

Documentation:
List of locations with amounts
or written agreements.

Personnel – Precinct Workers

Workers are paid for actual time at polling place.

A Delivery Fee is reimbursable up to \$25 per polling location.
(Must be split if joint.)

Precinct workers may be reimbursed up to \$12 per hour.

May be compensated for two hours before polls open and two hours after polls close – training hours may not be included.

Compensation Sheets/Spreadsheet must include the date and hours worked.

Office Rental (year-round)

Only reimbursed up to party's administrative cost cap.

SOS may only reimburse 30% of rent for an office held longer than the duration of the Primary.

A primary office in addition to an existing party office is not eligible for reimbursement by SOS.

SOS will not reimburse for an office space where the party chair, chair's spouse, or chair's family has financial interest.

Lease agreement must be provided in order for party to receive reimbursement from SOS.

Telephone & Utilities will also be reimbursed at 30% for year round office rental.

Office Rental (Primary Only)

Only reimbursed up to party's administrative cost cap.

SOS will reimburse 100% of an office lease held only from November to the final month of the Primary or Runoff (if applicable).

If the office is only held for the duration of the Primary, 3 competitive bids must be acquired.

SOS will not reimburse for an office space where the party chair, chair's spouse, or chair's family has financial interest.

Lease agreement must be provided in order for party to receive reimbursement from SOS.

Telephone & Utilities will also be reimbursed at 100% for offices leased solely for the primary.

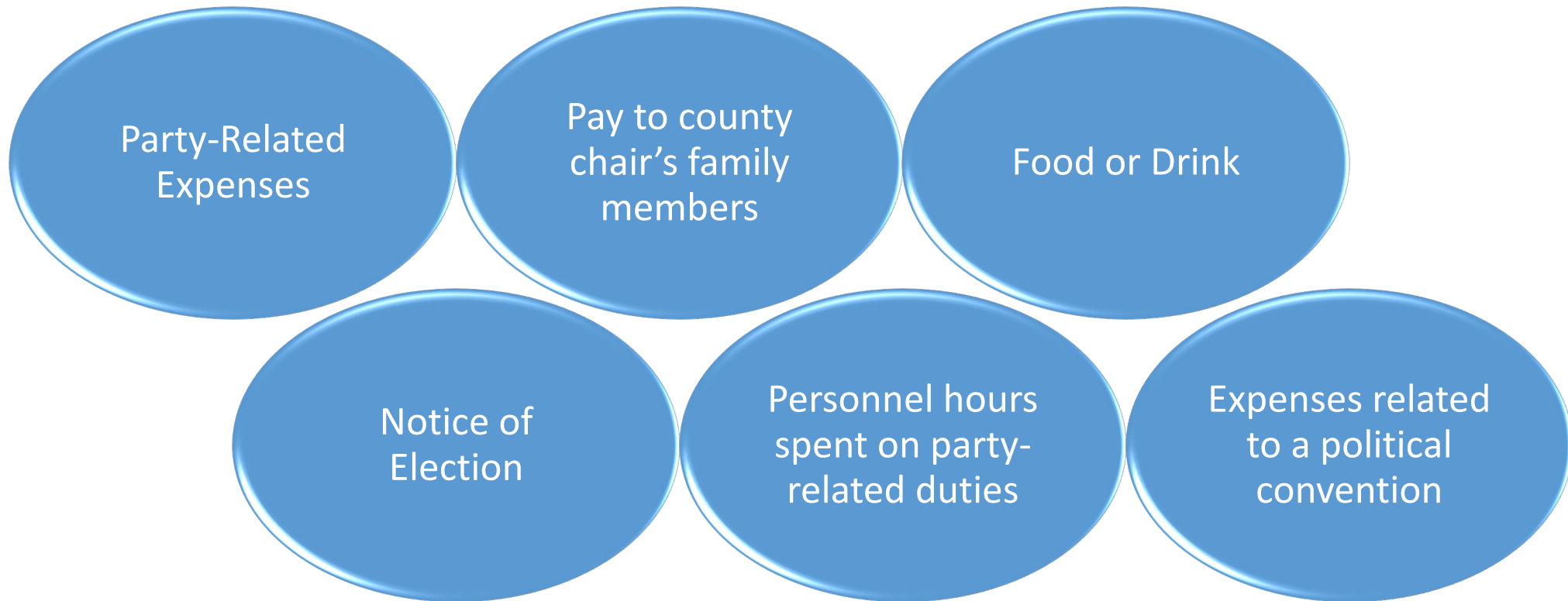
Computer Purchase

May only be reimbursed
every other Primary cycle.
(Every 4 years.)

Computer is property of
county executive
committee, not chair.

Invoice with serial number
must be submitted to SOS
to be reimbursed.

Non-Reimbursable Party Expenses



Non-Reimbursable County Expenses

Statutorily
required duties
and election
officer pay

Everyday
Supplies

Ballot Boxes &
Booths

Purchase of
removable
media devices

Early Voting
Expenses

Employee time
during normal
business hours

Postage for Mail
Ballots

Submitting your Final Cost Report

EMR Registration

- Previous links to various systems, such as Primary Finance, County and Precinct Chair Candidate Filing, and County and Precinct Chair Contact Information, have been replaced with the new single sign-on interface.
- Once a user logs in successfully, that user will see links to all applications to which they have access.



Navigating our Website

Hover your cursor over “Elections & Voting” and select “Conducting Elections”

The screenshot shows the Texas Secretary of State website. At the top right, there are links for Media, Site Map, Help, Contact, and En Español. The main header includes the Texas Secretary of State logo and the name Jane Nelson. Below the header is a navigation bar with several menu items: About SOS, Elections & Voting, Business Services, Notary & Apostilles, Rules & Meetings, International Relations, and Forms & Other Services. The 'Elections & Voting' menu is highlighted with an orange box, and a dropdown menu is visible below it. The dropdown menu contains the following items: VoteTexas.gov - Voter Information, Voter Registration Resources, Conducting Elections (highlighted with an orange arrow), Candidate Information, Officials and Officeholders, Election Results, Audit Program, Training and Educational Resources, Election Funds Management, Forms, Resources and Legal Library, and Voting Systems. The main content area features a large blue banner with the text 'Welcome to the Texas Secretary of State' and a photo of Secretary Jane Nelson. The banner also includes the text: 'Whether you are filing a business, wish to learn more about voting, or need assistance with another service, the Texas Secretary of State is here to serve you.'



Navigating our Website

Conducting Your Elections

Laws and Procedures Pertaining to:

- [County Chairs of Political Parties](#)
- [County Election and Voter Registration Officials](#)
- [Local Election Official \(Cities, Schools, and Other Political Subdivisions\)](#)

Click here to access Laws and Procedures Pertaining to County Chairs.

Notable Links

- [Texas Election Security Update](#)
- [Election Officials and Officeholders](#)
- [Election Forms](#)
- **Revised:** [Election Complaint to the Secretary of State \(PDF\)](#)
- [Elections Acronyms and Abbreviations](#)
- **Revised:** [Elections Glossary \(For All Election Officials\)](#)
- [Glossary of Spanish Terminology/Términos de Elecciones](#)
- [Texas Election Code](#) (Texas Legislative Council)



Voter ID Requirements

REVISED:

- Acceptable Forms of Identification (PDF)
- Notice of Acceptable Identification Poster (English) 8.5x11 (PDF)
- 11x17 (PDF)
- 24x36 (PDF)
- Notice of Acceptable Identification Poster (Spanish) 8.5x11 (PDF)



Navigating our Website

Laws and Procedures Pertaining to County Chairs of Political Parties

2023 Election Advisories and Memos

- **New:** [No.2023-12](#) - Texas Certification Procedures for Electronic Pollbooks
- **New:** [No.2023-11](#) - NEW LAW: Election Precincts and Polling Places – Senate Bill 924
- [No.2023-10](#) - NEW LAW: Changes to Early Voting by Personal Appearance – House Bill 1217
- [No.2023-09](#) - November 7, 2023 Election Law Calendar
- [No.2023-08](#) - 2023 Legislative Summary – 88th Regular Session and Second Special Session
- [No.2023-07](#) - Volunteer Deputy Registrars
- [No.2023-06](#) - Appointment Procedures for County Election Precinct Presiding and Alternate Judges, Election Clerks, Early Voting Ballot Board Members, Signature Verification Committee Members, and Central Counting Station Personnel
- [No.2023-05](#) - Exemptions to Voting System Accessibility

Election Forms

General Election Information

- [Current Election Information](#)
- [Important Election Dates 2023-2024](#)

Data Entry Applications for County Chairs

County and Precinct Chair

- [County and Precinct Chair Data Entry Applications](#)

Primary Finance

- [Primary Finance](#)

New to Elections?

- [Elections 101 Power point \(PPSX\)](#)

Click here to access County and Precinct Chair Data Entry Applications.

Click here to access the Primary Finance page of our website.



Navigating our Website

Primary Finance

Online Tools

- [Online Primary Finance System](#)

Click here to access the Online Primary Finance System.

New: Please use the following spreadsheets to organize your primary-related expenses:

- [B 8. Preparation and Transportation of Voting Equipment \(xlsx\)](#)
- [B 10. Precinct Workers \(xlsx\)](#)
- [B 12. Central Counting Station Manager \(xlsx\)](#)
- [B 13. Tabulation Supervisor \(xlsx\)](#)
- [B 14. Assistants to the Tabulation Supervisor \(xlsx\)](#)
- [B 15. Central Counting Station Judges and Clerks \(xlsx\)](#)
- [B 16. Early Voting Ballot Board Judges and Clerks \(xlsx\)](#)
- [B 17. Provisional and Late Ballot Board Judges and Clerks \(xlsx\)](#)
- [B 18. Supplies \(xlsx\)](#)
- [B 23. Other Primary Costs \(xlsx\)](#)

Prescribed spreadsheets may be used to organize and report costs.

Election Funds Quick Links

- [Help America Vote Act \(HAVA\)](#)
- [Voter Registration Chapter 19](#)
- [Primary Finance](#)
- [Texas Election Code](#)
- [Texas Administrative Code](#)
- [Texas Legislature](#)
- [HAVA & Chapter 19 Funds Travel Reimbursement Information](#)



Login Interface - emr.sos.texas.gov



Use a registered account to log in.

Email

Password

Remember me?

[Register as a new user](#)

[Forgot your password?](#)

Click on “Register as a new user” if it’s your initial setup or “Forgot your password” if you’ve already registered and don’t know your password.

If you get the following error message when registering as a new user, contact the EFM staff at:

EFMAdmin@sos.Texas.gov
512-463-5966

Create a new account.

The email address you entered is not pre-registered with SOS. Please confirm the email address.

Email

Password

Confirm password

Once Logged In (example)...

Elections Management and Reporting Contact SOS **TEST SERVER** Hello demchair@bastrop.gov

Click this link at anytime to return to this home screen.



Elections Management and Reporting

Primary Finance

Enter and examine information here.

[Primary Finance»](#)

Chair Travel

Review travel claims here.

[Chair Travel»](#)

Direct Deposit Form

View/download the form here.

[Direct Deposit Form»](#)

Click here to download the Direct Deposit Authorization Form.

Click here to submit your Primary & Runoff Estimates and Final Cost Report.

County and Precinct Chair Contact Information

Enter and examine county and precinct chair contact information here.

[County & Precinct Contacts»](#)

County and Precinct Chair Candidate Filing

Enter filing information here.

[County & Precinct Filing»](#)

Click here to submit request for seminar travel reimbursement.

More on travel reimbursement later in the presentation.



Submitting your Final Cost Report

Reports must be submitted through the Online Primary Finance System.

Reports must be submitted by August 31, 2024.

Supporting documentation must be submitted with report.

Surplus funds must be returned to Secretary of State after approval of report.

Texas Administrative Code Rule §81.101



Requires County Chairs to submit a Final Cost Report through the Online Primary Finance System even if the party did not incur any costs.



Requires County Election Officers who contract with parties to submit actual costs through the Online Primary Finance System.



Provides for direct payment from SOS to a County Election Officer who conducts a primary election under an Election Services Contract.



Requires voting system vendors (ES&S and Hart) to invoice SOS directly for primary services and materials.



Who Reports What?

County Chair

- Reports non-contracted election day costs, if any.
- Reports administrative costs, if any.
- Reports candidate filing fees, if any.
- Reports statistical information (obtain from CEO if necessary).

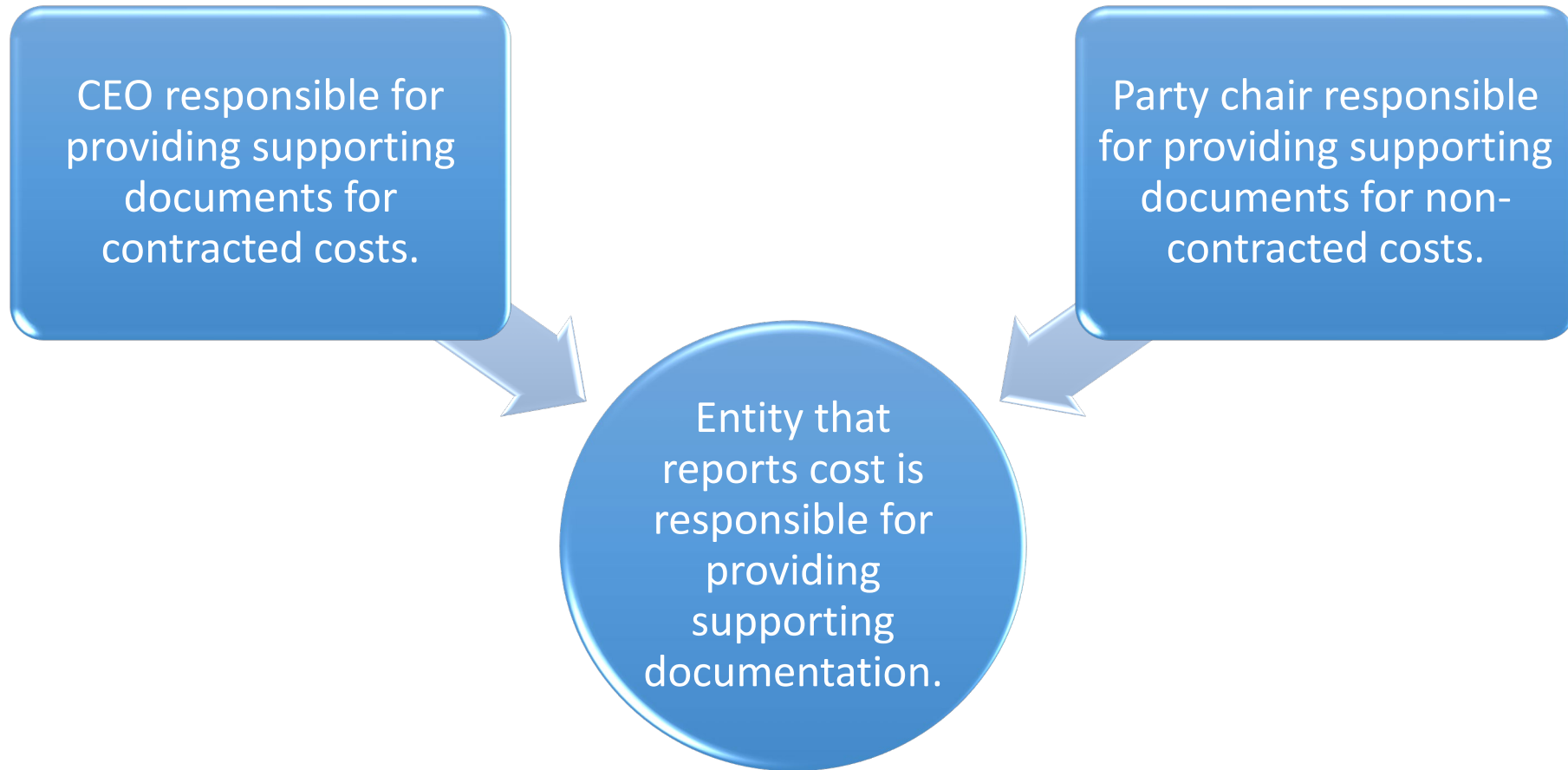
County Election Officer (CEO)

- Reports all expenses for duties or services performed under an Election Services Contract.
- May also report statistical information.

Voting System Vendors

- Election Systems & Software and Hart Intercivic
- Reports all allowable services and items ordered by Chair or CEO and indicates who ordered the service or item.

Supporting Documentation Required



Supporting documentation includes, but is not limited to:



Invoices, Bills and Receipts for each Item or Service



Lease Agreement for Office Rental



Competitive Bids for Office Rental



Utility Invoices associated with Office Rental



Supporting documentation includes, but is not limited to:



Election Workers' Compensation Sheets or Prescribed Spreadsheet



Job Description and Wages of Administrative Office Personnel



Electronic Bookkeeping Records such as Quickbooks and Quicken (if available)



Primary Account Bank Statements from November 2023 through March 2024 (if no runoff) or June 2024 (if runoff)



Submitting Supporting Documents

Upload:

Through the Online Primary Finance System

Email:

EFMAdmin@sos.texas.gov

Fax:

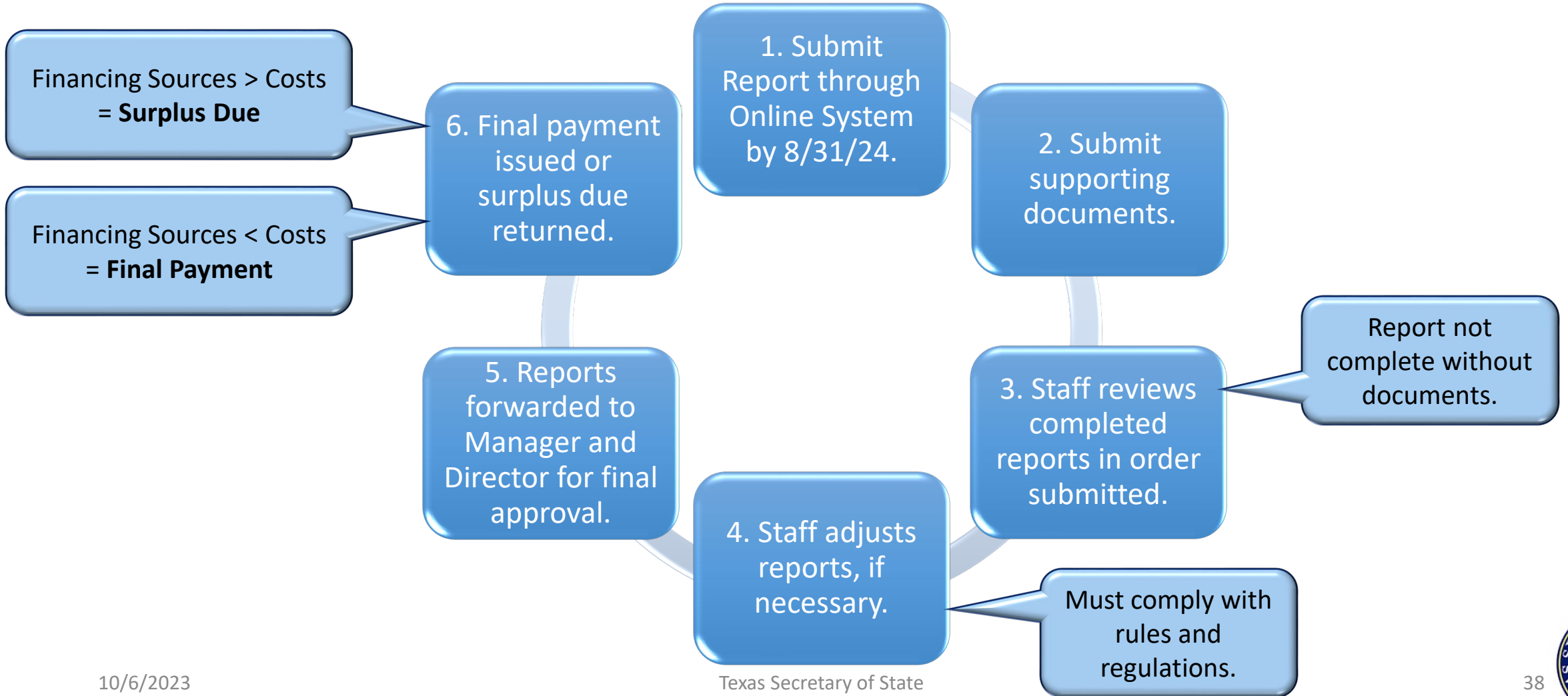
512-463-7552

Mail:

Election Funds Management
P.O. Box 12060
Austin, TX 78711-2060



Approval Process



After Approval

Email notification sent indicating surplus is due or final payment will be issued.



Chair compensation is paid after report is approved.



Surplus funds must be returned after report is approved.



Primary account may be kept open with minimum balance.



Primary account should be kept open to be used for next primary, if feasible.



Paying Chair Compensation



Payment will not be authorized until report has been approved.

Shall be paid with a check drawn on the party's primary account.



Chair compensation may be denied for chairs who file delinquent reports.



Transfer of Records to New County Chair



Primary records, including financial records, must be transferred to new chair not later than 30 days after new chair takes office.



All bank accounts must be transferred to new chair not later than 30 days after new chair takes office.



Outgoing chair is authorized to make copies of all records being transferred and to maintain materials prior to transferring.



If final cost report has not been finalized, incoming chair & outgoing chair are responsible for determining how best to submit report.



Seminar Travel Reimbursement

SOS shall reimburse county chair or county chair's designee for travel to attend seminar.

Travel Reimbursement requests must be submitted within 60 days.

Hotel for two nights is approved for counties more than 200 miles from Austin.

SOS will not reimburse for gratuities or meals.

What is Reimbursable?

Mileage for Personal Vehicle:

GSA Reimbursable Rate is \$0.655 per mile

Airfare (Coach Only) - Receipt Required

Airport Transfers & Parking - Receipts Required

Hotel: Not to exceed GSA max rate of \$158 per night. Receipt with \$0.00 balance required.

Submitting Travel Request Online

Elections Management and Reporting

Contact SOS

TEST SERVER

Hello demchair@bastrop.gov



Elections Management and Reporting

Primary Finance

Enter and examine information here.

[Primary Finance»](#)

Chair Travel

Review travel claims here.

[Chair Travel»](#)

Direct Deposit Form

View/download the form here.

[Direct Deposit Form»](#)

County and Precinct Chair Contact Information

Enter and examine county and precinct chair contact information here.

[County & Precinct Contacts»](#)

County and Precinct Chair Candidate Filing

Enter filing information here.

[County & Precinct Filing»](#)

Click here to
submit request
for seminar travel
reimbursement.



Submitting Travel Request Online

[Upload Documentation](#)

Click here to upload receipts.

Primary Finance 2024 - Chair Travel

Travel expenses have been saved but not submitted

County/Party: Test Democrats
Chair Name: Test Dem County Chair
Chair Address: 209 East 10th Street
City/State/ZIP: Austin, TX 78701
Chair Phone: 512-123-456
Chair E-Mail Address: (no email)

Provide travel expense details below and click Continue

Traveler Name	<input type="text" value="John Doe"/>
Departure City	<input type="text" value="San Antonio"/>
Auto Mileage (round trip miles)	<input type="text" value="120"/> (@ 65.5¢ per mile per state mileage guide)
Air Fare (round trip to Austin, receipt required)	<input type="text" value="0"/>
Hotel (\$158 max, plus tax, receipt required)	<input type="text" value="158"/>
Airport Transfers or Parking (receipt required)	<input type="text" value="20"/>

[Continue](#)

Auto expenses reported of \$78.60 is per 120 miles times 65.5 cents per mile
Total of expenses reported is \$256.60

Enter number of round trip miles here. (Reimbursable amount will be auto-calculated after you click "Continue").

Confirm Contact Information: Information can be updated through the "County and Precinct Chair Contact Information System".

When all expenditures have been entered, click here.



Submitting Travel Request Online

[Upload Documentation](#)

Primary Finance 2024 - Chair Travel

Travel expenses have been saved but not submitted

County/Party: Test Democrats
Chair Name: Test Dem County Chair
Chair Address: 209 East 10th Street
City/State/ZIP: Austin, TX 78701
Chair Phone: 512-123-456
Chair E-Mail Address: (no email)

Provide travel expense details below and click Continue

Traveler Name
Departure City
Auto Mileage (round trip miles) (@ 65.5¢ per mile per [state mileage guide](#))
Air Fare (round trip to Austin, receipt required)
Hotel (\$158 max, plus tax, receipt required)
Airport Transfers or Parking (receipt required)

Auto expenses reported of \$78.60 is per 120 times 65.5 cents per mile
Total of expenses reported is \$256.60

By clicking 'Submit', I do solemnly swear that the foregoing facts and costs are true and accurate costs of attending the Secretary of State Biennial Election Law Seminar for County Chairs

Submit

Make Corrections

Completed Direct Deposit Forms should be returned to our Accounts Payable Team at:

Sospay@sos.texas.gov or
Secretary of State
Accounts Payable/Direct Deposit Program
1019 Brazos #431
Austin, TX 78701-2413

If a Direct Deposit Account has not been set up, payment will be issued by Warrant payable to “_____ County Democratic or Republican Party Chair”.

Click here to submit travel expenditures.



Submitting Travel Request Online

Elections Management and Reporting

Contact SOS

TEST SERVER

[Upload Documentation](#)

Primary Finance 2024 - Chair Travel

Please advise how supporting documents will be delivered to the Secretary of State

- Check here if supporting documents have been uploaded using the Upload Documentation link above.
- Check here if supporting documents will be faxed to 512-463-7552.
- Check here if supporting documents will be emailed to efmadmin@sos.texas.gov.
- Check here if supporting documents will be mailed to:

Texas Secretary of State
Election Funds Management Team
P.O. Box 12060
Austin, TX 78711

Confirm Submit

Cancel Submit

Check the appropriate box.

Click here to submit travel expenditures to our office.



Contact Election Funds Management



Dan Glotzer
Dglotzer@sos.texas.gov



Mary Eliassen
Meliasen@sos.texas.gov



Clay Wilson
Cwilson@sos.texas.gov



Jake Salisbury
Jsalisbury@sos.texas.gov

EFMAdmin@sos.texas.gov 512-463-5966

