

# Submitting your Primary Estimate



2024 Primary Election

# Submitting your Primary Estimate



Texas Election Code Sec. 173.081 requires county chairs to submit a statement of estimated expenses.



County Election Officers who conduct a primary election under an Election Services Contract may also submit a primary estimate.



Primary estimate payments in the amount of 75% of the estimated expenses will be issued after approval.



The deadline to submit primary estimates is not later than the 45<sup>th</sup> day before the general primary election.



# Submitting your Primary Estimate



System will be pre-populated with actual costs taken from the 2020 Final Cost Report.



Changes can be made to estimated costs if you anticipate an increase or decrease in costs.



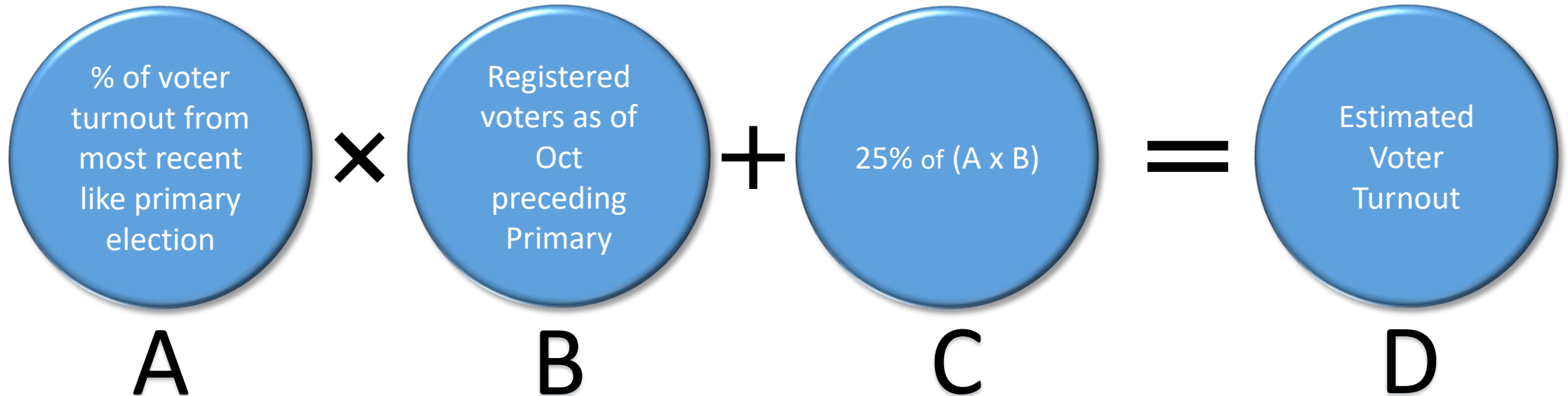
Candidate Filing Fees will be pre-populated from 2020 Final Cost Report until end of Candidate Filing Period – Filing Fees will be pulled from TEAM System after Candidate Filing Period.



Primary estimate payments will not be made if estimated candidate filing fees exceed estimated expenses.



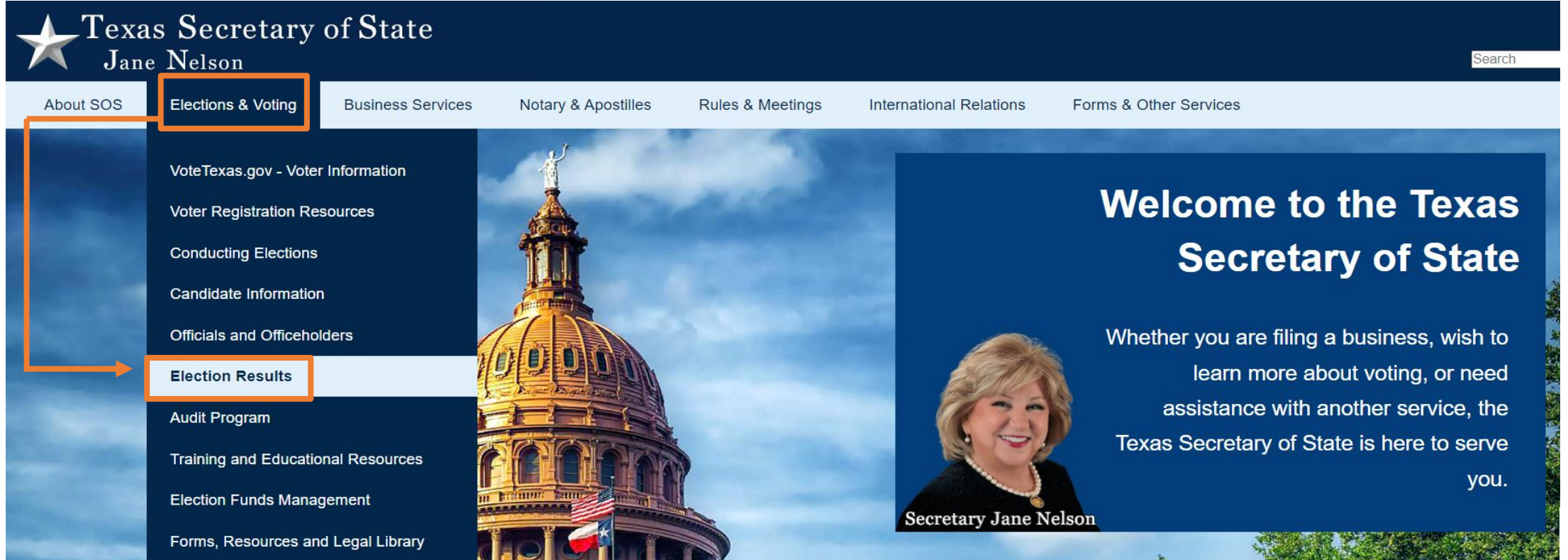
# Estimating Voter Turnout



[§81.116](#)

# Estimating Voter Turnout

Percentage of Voter Turnout for previous elections can be found on the “Official Election Results” page of our website. To access, hover your cursor over “Elections & Voting” and select “Election Results”.



The screenshot shows the Texas Secretary of State website header with the name Jane Nelson and a search bar. The main navigation menu includes: About SOS, Elections & Voting, Business Services, Notary & Apostilles, Rules & Meetings, International Relations, and Forms & Other Services. The 'Elections & Voting' menu is open, showing options: VoteTexas.gov - Voter Information, Voter Registration Resources, Conducting Elections, Candidate Information, Officials and Officeholders, Election Results (highlighted), Audit Program, Training and Educational Resources, Election Funds Management, and Forms, Resources and Legal Library. A blue banner on the right says 'Welcome to the Texas Secretary of State' and '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.' Below the banner is a photo of Secretary Jane Nelson.





# Estimating Voter Turnout

## Election Results/Data

### Official Election Results



Select "Election Results" to open the "Official Election Results" page of our website.

- [Historical Election Results](#)

### Election Information and Turnout Data

- [County Election Information and Polling Locations](#)
- [Early Voting Turnout](#)
- [Election Day Voting Turnout](#)
- [Voter Registration Figures 1991 – Present](#)
- [Voter Registration and Turnout Figures \(1970-current\)](#)

Click here to access current voter registration data. Data is currently available for January 2023. Voter Registration data for November 2023 will be posted when it becomes available.

# Estimating Voter Turnout – Official Election Results Page

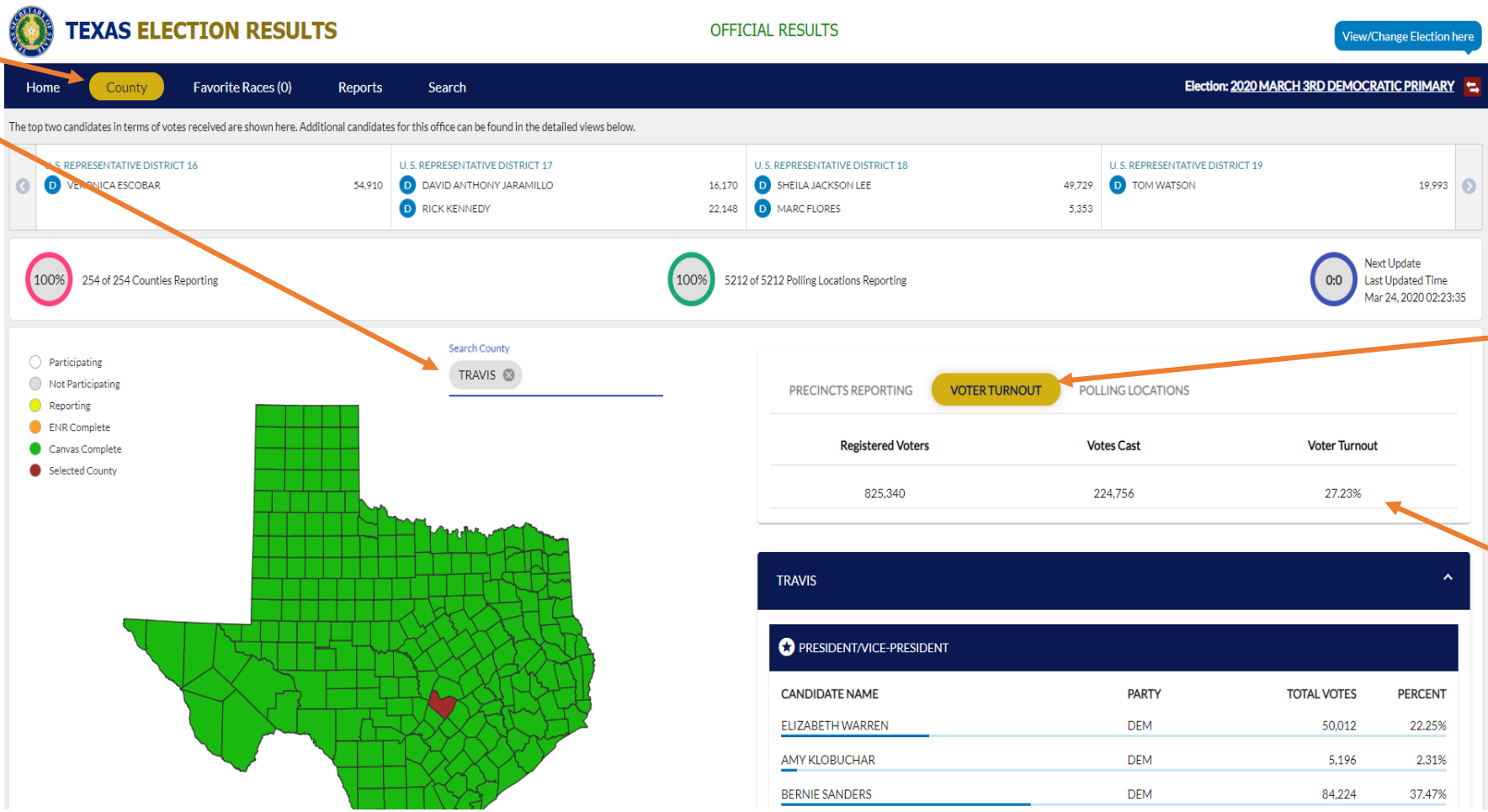
Select "County" to access voting data for your county.

Use the formula from Slide 4 to estimate your voter turnout.

2020 March 3<sup>rd</sup> Democratic Party Primary shown here. Click red box to change election.

Select "VOTER TURNOUT" to view voting data for the selected election. Data from the 2020 Primary Elections can be used to estimate your voter turnout.

Percentage of voter turnout for 2020 March 3<sup>rd</sup> Democratic Primary.



**TEXAS ELECTION RESULTS** OFFICIAL RESULTS [View/Change Election here](#)

Home **County** Favorite Races (0) Reports Search Election: 2020 MARCH 3RD DEMOCRATIC PRIMARY

The top two candidates in terms of votes received are shown here. Additional candidates for this office can be found in the detailed views below.

U. S. REPRESENTATIVE DISTRICT 16 VENONICA ESCOBAR (D) 54,910	U. S. REPRESENTATIVE DISTRICT 17 DAVID ANTHONY JARAMILLO (D) 16,170 RICK KENNEDY (D) 22,148	U. S. REPRESENTATIVE DISTRICT 18 SHEILA JACKSON LEE (D) 49,729 MARC FLORES (D) 5,353	U. S. REPRESENTATIVE DISTRICT 19 TOM WATSON (D) 19,993
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100% 254 of 254 Counties Reporting      100% 5212 of 5212 Polling Locations Reporting      0:0 Next Update Last Updated Time Mar 24, 2020 02:23:35

Search County: TRAVIS

PRECINCTS REPORTING	VOTER TURNOUT	POLLING LOCATIONS
Registered Voters	Votes Cast	Voter Turnout
825,340	224,756	27.23%

TRAVIS

PRESIDENT/VICE-PRESIDENT

CANDIDATE NAME	PARTY	TOTAL VOTES	PERCENT
ELIZABETH WARREN	DEM	50,012	22.25%
AMY KLOBUCHAR	DEM	5,196	2.31%
BERNIE SANDERS	DEM	84,224	37.47%



# Planning for the Primary

The formula in [§81.117](#) may be used to calculate number of workers per polling location.

The formula in [§81.124](#) may be used to calculate number of ballots per polling location.

The formula in [§81.125](#) may be used to calculate number of DRE's or ballot counters per polling location.

Use your judgement—these formulas are simply a starting point for estimating figures for the Primary



# Accessing the 2024 Primary Finance System

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 the following items: About SOS, Elections & Voting (highlighted with an orange box), Business Services, Notary & Apostilles, Rules & Meetings, International Relations, and Forms & Other Services. A dropdown menu is open under 'Elections & Voting', listing: 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 background of the page shows the Texas State Capitol building.



# Accessing the 2024 Primary Finance System

## 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)



# Accessing the 2024 Primary Finance System

 Texas Secretary of State  
Jane Nelson

- About SOS
- Elections & Voting
- Business Services
- Notary & Apostilles
- Rules & Meetings
- International Relations
- Forms & Other Services

## 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 the Primary Finance page of our website.





# Accessing the 2024 Primary Finance System

## 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](mailto: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



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

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

Click here to download the Direct Deposit Authorization Form.





## Sample Primary Estimate Report

### Primary Finance 2024 - Primary Estimate Application Sample County Sample Party Chair

- Below are "prepopulated" primary estimate figures based on the most recent available data.
- Before you start the review process, please provide values in the Statistics box towards the right of the screen.
- After the statistics have been entered, you may edit the figures by selecting the appropriate cost or revenue category from the dropdown below.

When all statistics and expense estimates have been entered/updated, click Submit.

Select "Submit" when you have completed your estimate.

System is pre-populated with actual primary costs approved for the 2020 Primary Final Cost Report.

All changes made will appear in the Entry Log at the bottom of the screen once the entry is saved. Please enter "Reason for Change" when adding or changing cost.

Costs reported by Chair will show in "Chair" column. Contracted costs reported by County will show in "County" column.

Changes to pre-populated amounts can be made by selecting the appropriate cost category from the drop down menu.

Administrative costs will need to be adjusted to remain within the party's primary admin cap if necessary.

Statistics must be saved and questions must be answered before the system will allow you to submit.

Payment in the amount of 75% of estimated costs will be issued upon approval.

	Chair	County	Per Vendor	Statistics
<b>Election Day Costs</b>				
B1 Ballot Printing	\$0.00	\$2,760.55		<input type="text" value="0"/>
B3 LA Testing Advertisement	\$0.00	\$25.51		<input type="text" value="0"/>
B4 Tech Support	\$0.00	\$2,569.75		<input type="text" value="0"/>
B5 Election Kits	\$0.00	\$3,387.62		<input type="text" value="0"/>
B6 County Owned Equipment	\$0.00	\$1,970.00		<input type="text" value="0"/>
B8 Voting Equipment Prep and Transport	\$597.00	\$17,368.81		<input type="text" value="0"/>
B9 Polling Place Rental	\$1,231.38	\$0.00		<input type="text" value="0"/>
B10 Precinct Workers	\$52,233.00	\$0.00		<input type="text" value="0"/>
B11 Delivery Fee	\$1,450.00	\$0.00		<input type="text" value="0"/>
B15 CCS Judges and Clerks	\$930.00	\$0.00		<input type="text" value="0"/>
B16 Early Voting Ballot Board Personnel	\$1,530.00	\$574.00		<input type="text" value="0"/>
B18 Supplies	\$0.00	\$1,751.14		<input type="text" value="0"/>
B19 Communication	\$0.00	\$1,430.86		<input type="text" value="0"/>
B20 Postage	\$454.85	\$0.00		<input type="text" value="0"/>
B22 Security	\$0.00	\$225.00		<input type="text" value="0"/>
B23 Other Primary Costs	\$0.00	\$5,325.60		<input type="text" value="0"/>
Contract Administrative Fee (calculated)		\$3,738.88		
<b>Total Election Day Costs</b>	<b>\$58,426.23</b>	<b>\$41,127.72</b>		
<b>Admin Costs (cap is \$24,000.00)</b>				
C1 Office Rent	\$2,875.50			
C2 Office Personnel	\$35,416.85			
C3 Telephones and Utilities	\$1,024.56			
C4 Office Supplies	\$1,335.90			
C5 Printing (Excluded from cap)	\$1,472.44			
C7 Bank Fees (Excluded from cap)	\$482.85			
<b>Total Admin Costs</b>	<b>\$42,608.10</b>			
<b>Financing Sources</b>				
E2 Candidate Filing Fees	\$14,500.00			
<b>Total Financing Sources</b>	<b>\$14,500.00</b>			
<b>NET</b>	<b>\$86,534.33</b>	<b>\$41,127.72</b>		
* Primary Estimate Eligible Amount:	\$64,900.75	\$30,845.79	\$0.00	

✓ Indicates vendor contracted with county, otherwise with chair

Will this be a joint primary?  Yes  No

Are any of the expenses contracted with the county?  Yes  No

What tabulation method is used?

Hand Count  Electronic

\* Pursuant to Sec. 173.083, Texas Elec Code, the Secretary of State will disburse 75% of the total estimated costs less non-state appropriated financing sources (e.g., candidate filing fees).



# Estimated Statistics must be Determined

Statistics	
Voter Turnout	<input type="text" value="0"/>
Polling Places	<input type="text" value="0"/>
Precincts	<input type="text" value="0"/>
Polling Places Shared	<input type="text" value="0"/>
Public Buildings Used	<input type="text" value="0"/>
Early Voting Stations	<input type="text" value="0"/>
Ballots Ordered	<input type="text" value="0"/>
Election Kits Ordered	<input type="text" value="0"/>

Will this be a joint primary?     Yes     No

Are any of the expenses contracted with the county?     Yes     No

What tabulation method is used?  
 Hand Count     Electronic

**Save Statistics**

**Estimated Statistics must be determined before the system will allow you to submit.**

**Estimated Voter Turnout, Polling Places, Precincts, and Early Voting Stations are required.**

**Questions must be answered.**

**County Chair or County Election Official can enter and save statistics.**

# Adding or Changing Pre-Populated Amounts

## Primary Finance 2024 - Primary Estimate Application

Sample County Sample Party Chair

- Below are "prepopulated" primary estimate figures based on the most recent available data.
- Before you start the review process, please provide values in the Statistics box towards the right of the screen.
- After the statistics have been entered, you may edit the figures by selecting the appropriate cost or revenue category from the dropdown below.

When all statistics and expense estimates have been entered/updated, click Submit.

No change was made

Select the appropriate cost category from the drop-down menu.

--select expense/revenue category--

- B7 Non-County Owned Equipment
- B8 Voting Equipment Prep and Transport
- B9 Polling Place Rental
- B10 Precinct Workers
- B11 Delivery Fee
- B12 Central Counting Station Manager
- B13 Tabulation Supervisor
- B14 Asst Tabulation Supervisor
- B15 CCS Judges and Clerks
- B16 Early Voting Ballot Board Personnel
- B17 Provisional and Late Ballot Board
- B18 Supplies
- B19 Communication
- B20 Postage
- B22 Security
- B23 Other Primary Costs
- C1 Office Rent
- C2 Office Personnel**
- C3 Telephones and Utilities
- C4 Office Supplies

✓ indicates vendor contracted with county, otherwise with chair

	Chair	County	Per Vendor
B1	\$0.00	\$2,760.55	
B3	\$0.00	\$25.51	
B4	\$0.00	\$2,569.75	
B5	\$0.00	\$3,387.62	
B6	\$0.00	\$1,970.00	
B8	\$597.00	\$17,368.81	
B9	\$1,231.38	\$0.00	
B1	\$52,233.00	\$0.00	
B1	\$1,450.00	\$0.00	
B1	\$930.00	\$0.00	
B1	\$1,530.00	\$574.00	
B1	\$0.00	\$1,751.14	
B1	\$0.00	\$1,430.86	
B2	\$454.85	\$0.00	
B2	\$0.00	\$225.00	
B2	\$0.00	\$5,325.60	
Contract Administrative Fee (calculated)		\$3,738.88	
<b>Total Election Day Costs</b>	<b>\$58,426.23</b>	<b>\$41,127.72</b>	
<b>Admin Costs (cap is \$24,000.00)</b>			
C1 Office Rent	\$2,875.50		
C2 Office Personnel	\$35,416.85		
C3 Telephones and Utilities	\$1,024.56		
C4 Office Supplies	\$1,335.90		
C5 Printing (Excluded from cap)	\$1,472.44		
C7 Bank Fees (Excluded from cap)	\$482.85		
<b>Total Admin Costs</b>	<b>\$42,608.10</b>		



# Adding or Changing Pre-Populated Amounts

## Primary Finance 2024 - Primary Estimate Application Sample County Sample Party Chair

- Below are "prepopulated" primary estimate figures based on the most recent available data.
- Before you start the review process, please provide values in the Statistics box towards the right of the screen.
- After the statistics have been entered, you may edit the figures by selecting the appropriate cost or revenue category from the dropdown below.

When all statistics and expense estimates have been entered/updated, click Submit.  
Make changes and Save, or Cancel

**C2 Office Personnel**

Amount: \$

Reason for change:

✓ indicates vendor contracted with county, otherwise with chair

	Chair	County	Per Vendor
<b>Election Day Costs</b>			
B1 Ballot Printing	\$0.00	\$2,760.55	
B3 LA Testing Advertisement	\$0.00	\$25.51	
B4 Tech Support	\$0.00	\$2,569.75	
B5 Election Kits	\$0.00	\$3,387.62	
B6 County Owned Equipment	\$0.00	\$1,970.00	
B8 Voting Equipment Prep and Transport	\$597.00	\$17,368.81	
B9 Polling Place Rental	\$1,231.38	\$0.00	
B10 Precinct Workers	\$52,233.00	\$0.00	
B11 Delivery Fee	\$1,450.00	\$0.00	
B15 CCS Judges and Clerks	\$930.00	\$0.00	
B16 Early Voting Ballot Board Personnel	\$1,530.00	\$574.00	
B18 Supplies	\$0.00	\$1,751.14	
B19 Communication	\$0.00	\$1,430.86	
B20 Postage	\$454.85	\$0.00	
B22 Security	\$0.00	\$225.00	
B23 Other Primary Costs	\$0.00	\$5,325.60	
Contract Administrative Fee (calculated)		\$3,738.88	
<b>Total Election Day Costs</b>	<b>\$58,426.23</b>	<b>\$41,127.72</b>	
<b>Admin Costs (cap is \$24,000.00)</b>			
C1 Office Rent	\$2,875.50		
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C4 Office Supplies	\$1,335.90		
C5 Printing (Excluded from cap)	\$1,472.44		
C7 Bank Fees (Excluded from cap)	\$482.85		

Enter new amount in data entry box and enter a reason for change. Select "Save" to change the pre-populated amount.



# Adding or Changing Pre-Populated Amounts

**Admin Costs (cap is \$24,000.00)**

C1 Office Rent	\$2,875.50		
C2 Office Personnel	\$18,000.00		
C3 Telephones and Utilities	\$1,024.56		
C4 Office Supplies	\$1,335.90		
C5 Printing (Excluded from cap)	\$1,472.44		
C7 Bank Fees (Excluded from cap)	\$482.85		

**Total Admin Costs** \$25,191.25

**Financing Sources**

E2 Candidate Filing Fees \$14,500.00

**Total Financing Sources** \$14,500.00

**NET** \$69,117.48      \$41,127.72

\* Primary Estimate Eligible Amount: \$51,838.11      \$30,845.79      \$0.00

Updated amount will be saved to Primary Estimate and new "Primary Estimate Eligible Amount" will be automatically calculated.

\* Pursuant to Sec. 173.083, Texas Elec Code, the Secretary of State will disburse 75% of the total estimated costs less non-state appropriated financing sources (e.g., candidate filing fees).

All saved data entry changes will show in the "Entry Log" located at the bottom of your screen.

Entry Log

Entry Date/Time	By	Item	Prior Amount	New Amount/Payment	Reason for Change / Notes
10/17/2023 03:46	Chair	C2 Office Personnel	\$35,416.85	\$18,000.00	Adjusted amount to remain within primary admin cap.



# Some Important Notes to Remember



Supporting documentation is not required for the Primary Estimate but all documents should be retained for submission with your Final Cost Report.



Primary Estimate payments will not be issued if candidate filing fees exceed estimated costs.



Primary estimate payments will be issued by direct deposit if a direct deposit account has been established. Payments will be issued by check if a direct deposit account is not active.



Voting System Vendors have elected not to submit a primary estimate to our office. Voting System Vendor costs will not show until the Final Cost Report is released.





# Contact Election Funds Management



Dan Glotzer

[Dglotzer@sos.texas.gov](mailto:Dglotzer@sos.texas.gov)



Mary Eliassen

[Meliasen@sos.texas.gov](mailto:Meliasen@sos.texas.gov)



Clay Wilson

[Cwilson@sos.texas.gov](mailto:Cwilson@sos.texas.gov)



Jake Salisbury

[Jsalisbury@sos.texas.gov](mailto:Jsalisbury@sos.texas.gov)

[EFMAdmin@sos.texas.gov](mailto:EFMAdmin@sos.texas.gov) 512-463-5966

