

CARS Project External Stakeholder Meeting

Date: August 13, 2025

Time: 1:30 p.m. to 2:30 p.m.



Welcome and Introductions

Margie Hieter, Project Sponsor

Harjit Basi, Project Director

John Heinlein, Assistant Project Director

Denise Tower, CGI Project Director

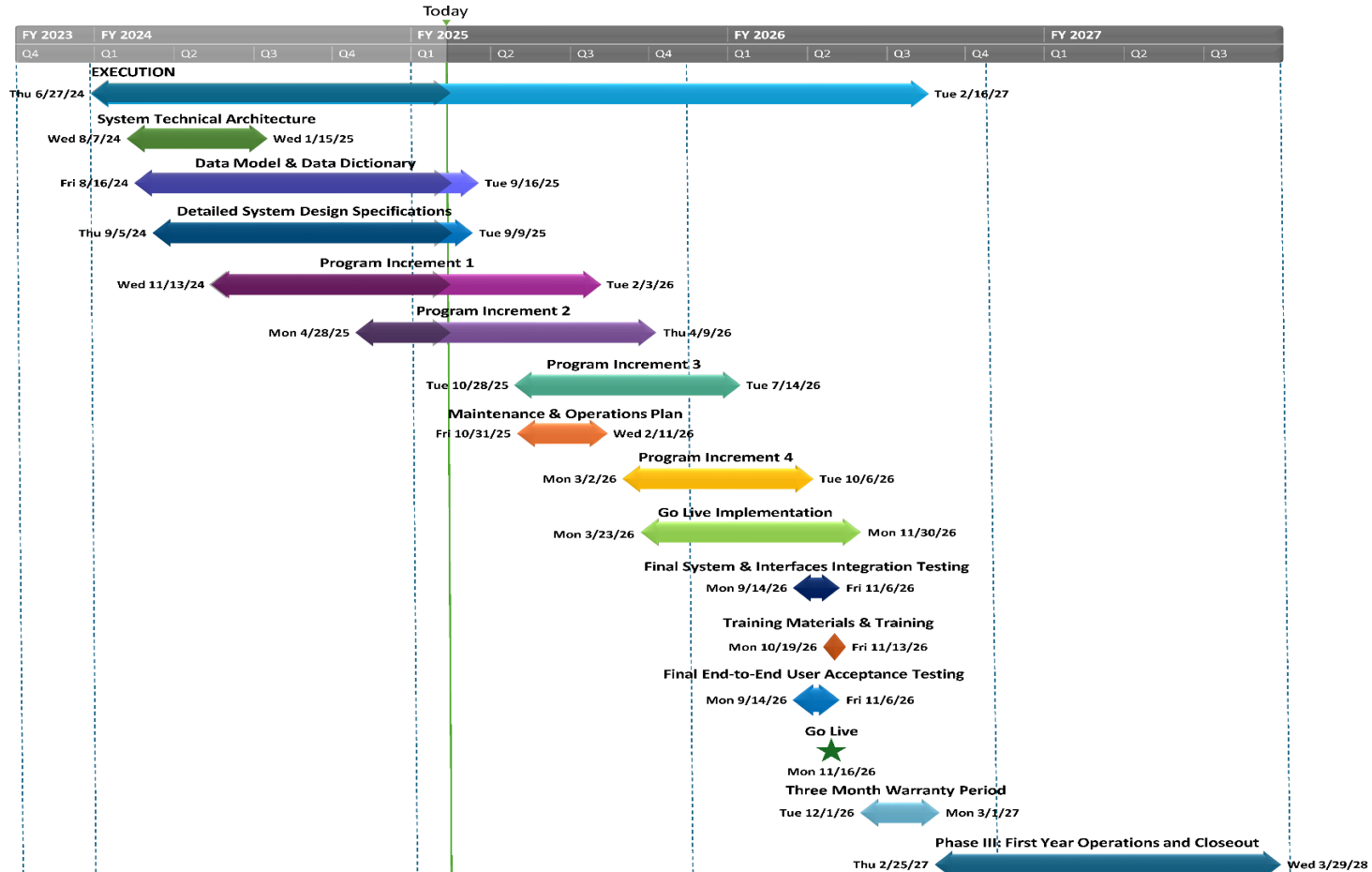
Agenda

- Project Updates
 - Project Schedule
 - Program Increments I & II Activity
 - Third Party Software Vendors
- Functionality Preview
- Next Steps
- Q&A

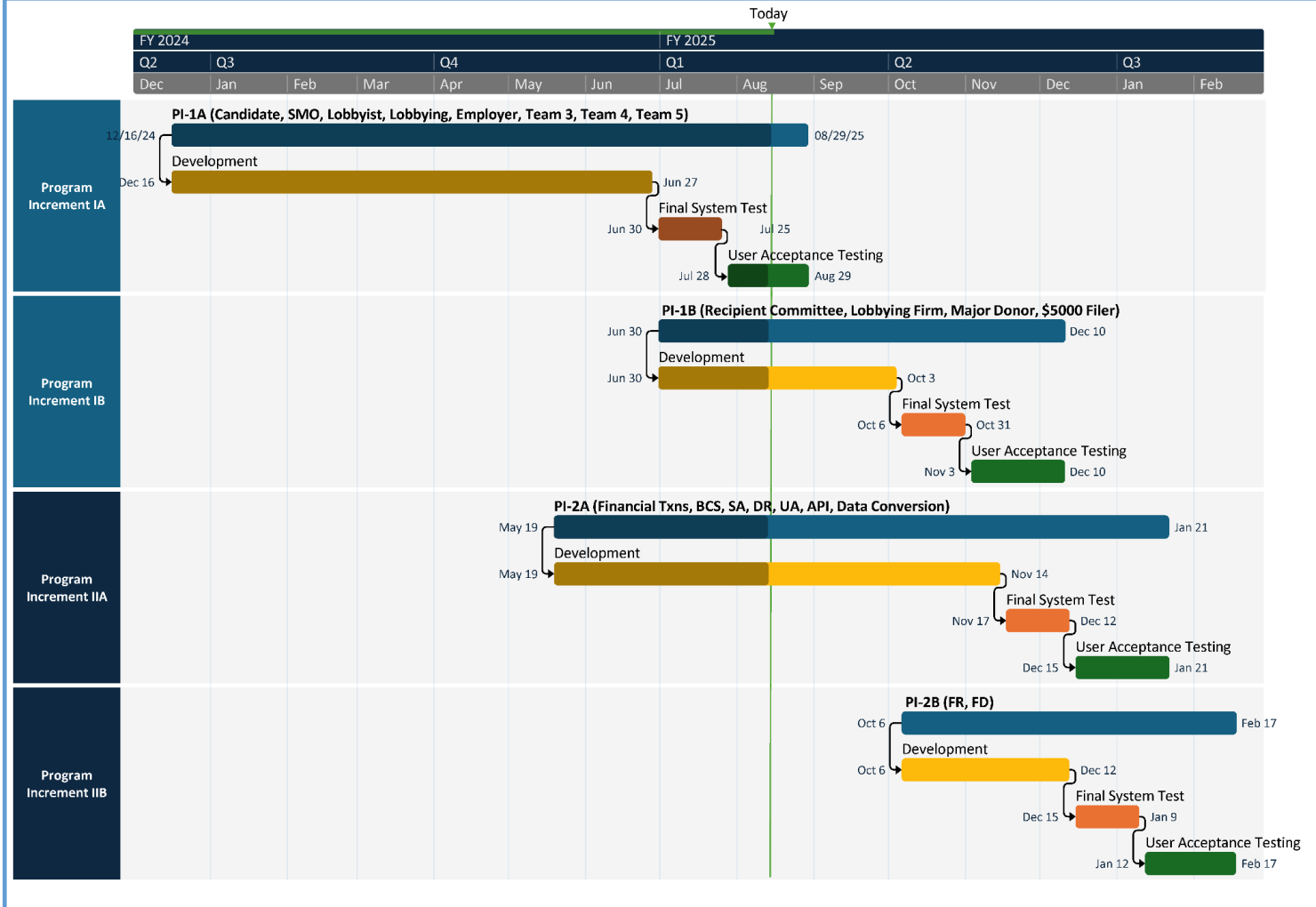
Project Updates

CARS Project Schedule

CARS PSR GANTT – Status as of 08/08/2025



CARS Project Schedule – PI 1A/1B & 2A/2B



PROGRAM INCREMENT I



Program Increment I – Design, Development, Testing: End to End Workstreams

Campaign	Lobbying
Candidate – User Acceptance Testing (UAT)	Lobbyist Employer/Coalition - UAT
State Mailer Organization – UAT	Lobbyist – UAT
Recipient Committee – In Development	Lobbying Firm/\$5000 filer – In Development
Major Donor/Independent/Other Specific Campaign Types – In Development/System Test	

Currently in Sprint 18: 8/11- 8/22

System Testing High Level Status



System Test Results Program Increment IA: 299
excluding Application Programming Interface (API) Test
Cases (TCs)

- Complete: Passed: 299 of 299 Test Cases
- Priority 1 and Priority 2: 262 bugs resolved
- Go Decision received on July 25 to move to UAT for PI IA



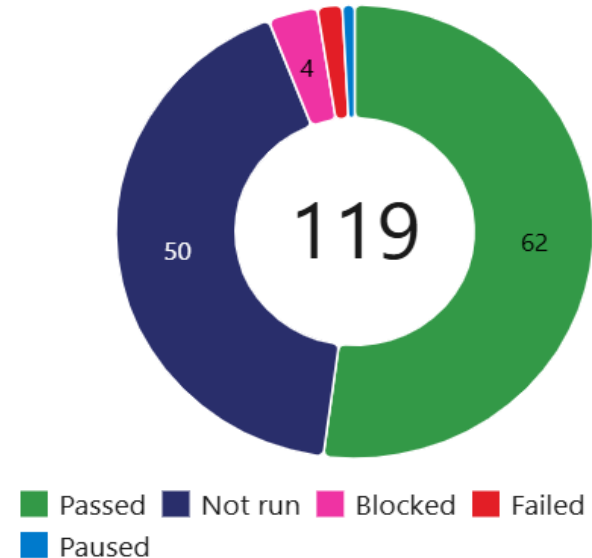
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PROGRAM INCREMENT IA – USER ACCEPTANCE TESTING UPDATE



- Currently in week three of five.
- Business categories being tested:
 - Candidate and Lobbyist Registration & Disclosure
 - User Notification.
- As of 8/11, 62 test cases have passed out of a total of 119.
- UAT involves both manual and automated testing activities.
- PI 1B UAT planning effort is underway.

PI 1 A - Chart



PROGRAM INCREMENT IB - CAMPAIGN



Program Increment I – Design, Development, Testing: End to End Workstreams

Recipient Committee	Major Donor/Independent Expenditure
FR-01: Register a Committee (410) - Under Development	FR-05: Establish Major Donor/Independent Expenditure/Other Filer Account – In System Test
FR06: Manage Penalty of Perjury Attestation – Under Development	FR-07: Request Linkage to a Registered User or Filing Entity – In System Test
	FD-01: Major Donor/Independent Expenditure Committee Campaign Statement (461) - In Development

Currently in Sprint 18: 8/11- 8/22

PROGRAM INCREMENT IB - LOBBYING



Program Increment I – Design, Development, Testing: End to End Workstreams

Lobbying Firm

FR01: Register a Lobbying Firm – Under Development

FR-06: Manage Penalty of Perjury and Attestation – Under Development

Currently in Sprint 18: 8/11- 8/22

PROGRAM INCREMENTS II, III, AND IV



Detailed System Design (DSD) and Data Model Data Dictionary (DMDD) – Requirements Clarification & Joint Application Design Sessions

- Filer Registration and Filer Disclosure – Complete
- System Administration – Complete
- Financial Transactions – Complete
- System Reports – Complete



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PROGRAM INCREMENTS II, III, AND IV



DSD and DMDD – Requirements Clarification & Joint Application Design Sessions (Continued)

- Draft submitted to SOS for formal review and feedback on 8/8/25
 - Third Party Vendor & Public APIs
 - Data Retrieval (Public Portal)
 - Correspondence (Framework, types, infrastructure, content worked on in PI III and IV)
 - Online Help (Framework, content not included filled out in PI IV)
 - Non-Functional – final review of requirements to incorporate any open item



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PROGRAM INCREMENT II DEVELOPMENT



II.4 Program Increment I – Design, Development, Testing: End to End Workstreams

Financial Transaction	System Administration/User Account Management/Common Components
FT-01: Create an Invoice – Under Development	SA-01.2: Configure System – Under Development
FT-05: Enter and Post an Online (Credit Card) Payment – Under Development	SA-01.2A: PRD Portal Common Services/Navigation - Under Development
	UA-02: Create a User Account – Under Development
	UA-03: Update a User Account – PRD – Under Development

Currently in Sprint 18: 8/11- 8/22

THIRD PARTY SOFTWARE VENDORS



Design sessions completed 7/8 and 7/22

- Continued to address design questions and review Application Programming Interface (API) specifications
- Last meeting on 8/12:
 - Summary/Cumulative Totals
 - Simplified Output
 - Attestation
- Next meeting scheduled 8/26

Proof-of-Concept – Third Party Software Vendor



Forms	Status
Form 501 – Candidate Intention Statement	Netfile (David Montgomery), PCG (Christian Ott), and GovAccess (Ray Kiddy) completed Step 1, working on dates for Step 2.
Form 400 – Slate Mailer Organization Statement of Organization Form 402 – Slate Mailer Organization Statement of Termination Form 604 – Lobbyist Certification Statement	Emails with test information will be sent to Proof-of-Concept (POC) participants this week to begin Step 1 Testing.
EFile processing status endpoint	The endpoint will be configured for each user, after which we will send out a new Postman collection, including the above forms and a processing status endpoint.

Step 1: POC testing participants use the Postman collection to test connectivity and send the payload we gave them, then show that the payload was processed in the backend.

Step 2: Testing participants send payloads from their own applications.

Step 3: 3rd Party SW Vendor using the submission id received in Step 1 and Step 2 to obtain information about their submission



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THIRD PARTY SOFTWARE VENDORS



- APIs delivered to System Test:

400	Statement of Org. (Slate Mailer Org.)	606	Notice of Termination
401	Slate Mailer Org. Campaign Statement	607	Notice of Withdrawal
402	Stmt. of Termination (Slate Mailer Org.)	615	Lobbyist Report
470	Officeholder and Candidate Campaign Stmt. – Short Form	630	Payments Made to Lobbying Coalition
470-S	Officeholder & Candidate Campaign Statement (Supp.)	635	Report of Lobbyist Employer and Report of Lobbying Coalition
501	Candidate Intention Statement	635-C	Payments Received by Lobbying Coalition
603	Lobbyist Employer or Lobbying Coalition Registration Statement	640	Governmental Agency Reporting other Payments to Influence Legislative or Administrative Action
604	Lobbyist Certification Statement		

THIRD PARTY SOFTWARE VENDORS



- Information located on the CARS Stakeholder Repository on SOS SharePoint:
 - YAML files for the APIs reviewed
 - Excel Spreadsheet from Design sessions – Topics and Notes Tabs
 - Feedback Log

PROGRAM INCREMENT I – FUNCTIONALITY PREVIEW



Functionality Preview

- Major Donor/Independent Expenditure (MD/IE) Registration
- CSV Upload Transaction file

Information & Feedback Channels

INFORMATION & FEEDBACK CHANNELS



- Third Party Software Vendor API Meetings held 7/8, 7/22, and 8/12
- Next External Stakeholder Meeting on 9/10/25
- PRD Website for [Quarterly Updates](#)
- Post-meeting survey: [August 13, 2025](#)



Visit the CARS project website

<https://www.sos.ca.gov/campaign-lobbying/helpful-resources/cal-access-replacement-system-project-cars-updates>

CARS Project Email Address

Submit questions and comments to the CARS project team:

PRDCARS@sos.ca.gov

- View documents, news, and events
- Sign up to receive project updates



Sign up for
e-updates



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CARS WEBSITE REMINDERS

CARS Project Homepage

[Home](#) > [Campaign & Lobbying](#) > [Helpful Resources](#) >
CAL-ACCESS Replacement System Project

Helpful Resources

[How To File Electronically](#)

[Electronic Filing Password Request](#)


[Elections Division](#)

[Federal Election Commission \(FEC\)](#)

[Fair Political Practices Commission \(FPPC\)](#)

[Political Reform Audit Program for the California Franchise Tax Board](#)

[CAL-ACCESS Replacement Project](#)



The California Automated Lobbyist and Campaign Contribution and Expenditure Search System (CAL-ACCESS) was developed to respond to the objectives of the Online Disclosure Act, added to the Political Reform Act by Ch. 866, Stats of 1997.

CAL-ACCESS is the public's window into California's campaign disclosure and lobbying financial activity, providing financial information supplied by state candidates, donors, lobbyists, lobbyist employers, and others. The CAL-ACCESS Replacement System (CARS) Project will implement a new data driven system replacing the existing form driven system.

To receive updates on the project as they become available follow the "sign up for e-updates" link at the bottom of this page, and, after entering your email address, select to subscribe to the CAL-ACCESS Replacement System Project Updates email list.

To reach us directly, send an email to prdcars@sos.ca.gov, call (916) 653-6224, or write to: Secretary of State, Political Reform Division, 1500 11th Street, Rm 495, Sacramento, CA 95814.


[News & Updates](#)

News & Updates for information prior to 2024 can be found on the [CARS Project Pre-2024 Archive page](#).

- October 9, 2024: Details for the monthly October Stakeholder meeting are in the [October 9, 2024 CARS Project External Stakeholder Meeting PowerPoint](#)

CARS Project Archive

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The following news and references are for the previous solution (prior to 2024) and may no longer apply. Current updates can be found on the [CARS Project homepage](#).

Project References

- Draft version 1.07 of the CAL-ACCESS XML file specifications document (XSD/ZIP)
- Draft version 0.12 of the CAL Access Application Programming Interface (API) Requirements(PDF)
- CAL-ACCESS Replacement Project, System Integrator Vendor, Request for Offer
- SIBA (PDF)
- 15 - State Survey (PDF)
- 2013 Request for Information (RFI) and Responses (PDF)

CARS Software Vendor/Service Provider Meeting Presentations

- March 30, 2021, CARS Software Vendor-Service Provider Meeting
- January 21, 2021, CARS Software Vendor-Service Provider Meeting
- November 30, 2020, CARS Software Vendor-Service Provider Meeting
- September 16, 2020, CARS Software Vendor-Service Provider Meeting
- July 8, 2020, CARS Software Vendor-Service Provider Meeting

CARS Stakeholder Input Group (SIG) Meeting Presentations

- March 16, 2021, CARS Stakeholder Input Group (SIG) Meeting
- January 20, 2021, CARS Stakeholder Input Group (SIG) Meeting
- December 2, 2020, CARS Stakeholder Input Group (SIG) Meeting
- October 7, 2020, CARS Stakeholder Input Group (SIG) Meeting
- August 19, 2020, CARS Stakeholder Input Group (SIG) Meeting

CARS External Stakeholder Meetings

- July 5, 2023: Details for the July Stakeholder meeting are in the [July 5, 2023 CARS Project Update for External Stakeholders PowerPoint](#)
- June 7, 2023: Details for the June Stakeholder meeting are in the [June 7, 2023 CARS Project Update for External Stakeholders PowerPoint](#)
- May 3, 2023: Details for the May Stakeholder meeting are in the [May 3, 2023 CARS Project Update for External Stakeholders PowerPoint](#)
- April 5, 2023: Details for the April Stakeholder meeting are in the [April 5, 2023 CARS Project Update for External Stakeholders PowerPoint](#)

For questions about project communications: PRDCARS@sos.ca.gov



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Q & A

WRAP UP