

CARS Project External Stakeholder Meeting

Date: November 12, 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

Jim Mason, CGI Business Analyst

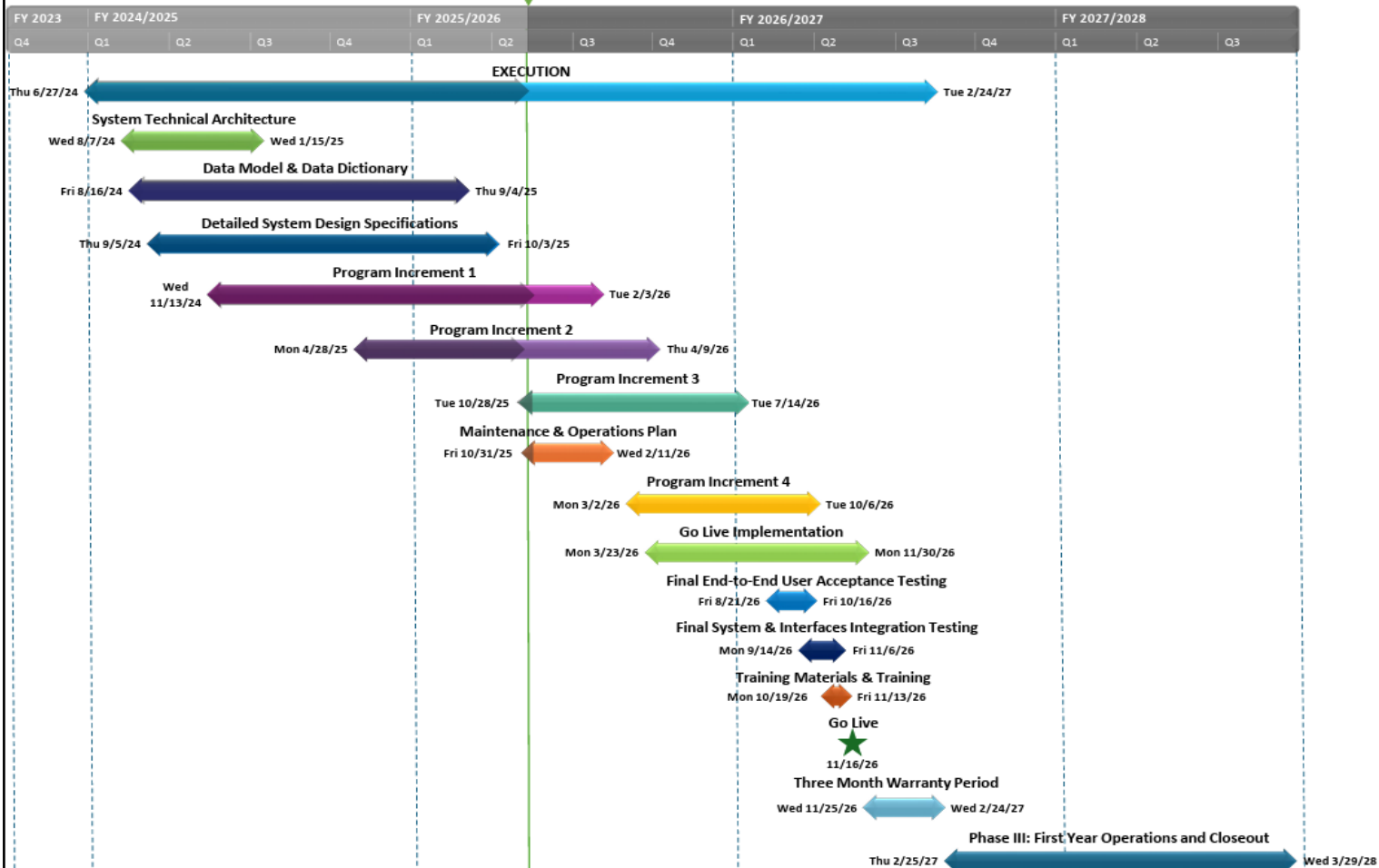
Agenda

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

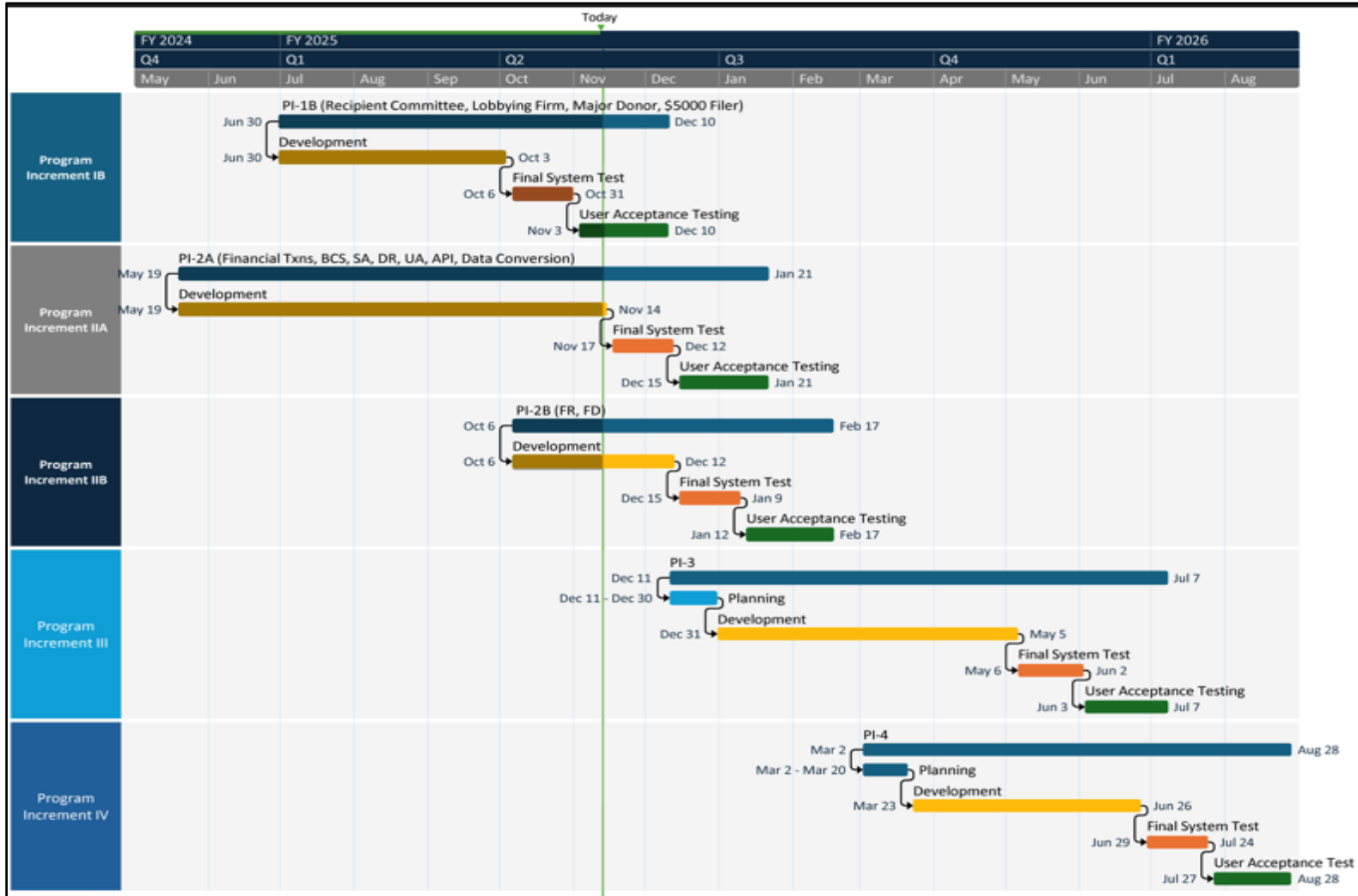
Project Updates

Project Schedule

CARS PSR GANTT – Status as of 11/7/2025



Project Schedule



PROGRAM INCREMENT I



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

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

Currently in Sprint 24: 11/03/25 - 11/14/25

PROGRAM INCREMENT IA – COMPLETE



Campaign	Lobbying
Recipient Committee (Registration)	Lobbying Firm/\$5000 Filer (Registration)
Major Donor/Independent Expenditure (Registration/Disclosure)	

Activities: Design, Development, Unit Testing, System Testing, User Acceptance Testing

- Development and Unit Testing Complete:
 - ✓ Requirements: 726 of 3,353 total requirements included (22%)
- System Testing: 299 Functional Test Cases passed
- User Acceptance Testing: 100 Test Cases passed
- Training developed and delivered to User Acceptance Testing participants

PROGRAM INCREMENT IB – UAT



Campaign	Lobbying
Recipient Committee (Registration)	Lobbying Firm/\$5000 Filer (Registration)
Major Donor/Independent Expenditure (Registration/Disclosure)	

Functionality Includes:

- Filer Registrations (Initial, Amend), Filer Disclosures (Initial & Amend)
- Attestation, Withdraw, Termination, Linkages
- Third Party Vendor Interfaces

PROGRAM INCREMENT IB – UAT



Activities: Development, Unit Testing, System Testing, User Acceptance Testing

- Development and Unit Testing Complete:
 - ✓ Requirements: 767 of 3,353 total requirements included (23%)
- System Testing: 157 of 166 Functional test cases passed
- User Acceptance Testing: In Progress 20 out 105 Test Cases passed, target completion 12/12/25
- Training developed and delivered to User Acceptance Testing participants

KEY PROGRAM INCREMENT I

– FUNCTIONALITY DELIVERED



Campaign

- Register (Initial/Amend):
 - Candidate: Candidate Intention Statement
 - Slate Mailer Organization: Statement of Organization
 - Recipient Committee: Statement of Organization
- Establish: Major Donors, Independent Expenditure, and \$5000 Filers
- Attest, Request Linkages, Withdraw, Terminate, Dispose Linkages, Upload Activity Transactions
- Activity Reports (Initial/Amend):
 - Officeholder/Candidate Campaign Statements (includes short-form)
 - Slate Mailer Organization Campaign Statement
 - Independent Expenditure Committee and Major Donor Committee Campaign Statement
 - Communications Identifying Slate Mailer Candidates
 - Advocacy & Advertisements Statement of Online Activity
 - Paid Spokesman Report

KEY PROGRAM INCREMENT I

– FUNCTIONALITY DELIVERED



Lobbying

- Register (Initial/Amend):
 - Lobbyist Employer/Lobbying Coalition Registration Statement
 - Lobbyist Report
 - Lobbyist Certification Statement
 - Lobbying Firm Registration
 - Lobbying Firm Activity Authorization
- Attest, Request Linkages, Withdraw, Terminate, Renew, Dispose Linkages, Upload Activity Transactions
- Activity Reports (Initial/Amend):
 - Payments made to Lobbying Coalitions
 - Payments Received by Lobbying Coalitions
 - Report of Lobbyist Employer/Lobbying Coalition
 - Other Payments to Influence Reporting by Lobbyist Employers and \$5,000 filers
 - 72h – Issue Lobbying Advertisement Report
 - 48h – End of Session Report
 - Enter a Lobbyist Report

PROGRAM INCREMENT IIA – DEVELOPMENT



Functionality	Functionality
Financial Transactions (Invoice, Payment Services, Waiver)	Common Services – Filer Portal and User Account Management
System Administration – PRD Staff	

- Currently under development, target completion 11/14/25
 - ✓ Requirements: 192 out of 3,353 (6%)
- System Test target 11/17/25 - 12/12/25
- User Acceptance Testing target 12/15/25 - 1/21/26

PROGRAM INCREMENT II – DEVELOPMENT



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

Financial Transaction

FT-01: Create an Invoice – In System Test

FT-02: Adjust an Invoice/Re-allocate a Payment – [In System Test](#)

FT-03: Cancel an Invoice – In System Test

FT-04: Cancel an Invoice for a Terminated Entity – In System Test

FT-05: Enter and Post an Online (Credit Card) Payment – In System Test

FT-06: Enter and Post a Manual Payment – [In System Test](#)

FT-07: Cancel a Receipt – [In System Test](#)

FT-09: Create a Waiver Request – [In Development](#)

FT-10: Process a Waiver Decision – [In Development](#)

PROGRAM INCREMENT II – DEVELOPMENT



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

System Administration/User Account Management/Common Components	System Administration/User Account Management/Common Components
UA-07.2: Reset a Password – Ready for System Test	SA-01.2: Configure System – In System Test
UA-09: Delete a Registered User Account – Ready for System Test	SA-01.2A: PRD Portal Common Services/Navigation – In System Test
Filer Portal – Common Service/Navigation – Ready for System Test	BCS7: Job Scheduler – In System Test
UA-02: Create a User Account – Ready for System Test	SA-01.2D: Manage Batch Processes – In System Test
UA-03: Update a User Account – PRD – Ready for System Test	SA-01.2C: PRD Disclosure – In Development
UA-05: Recover a Username – Ready for System Test	SA-012B: PRD Portal – Dashboard Framework – In Development

PROGRAM INCREMENT IIB – DEVELOPMENT



Functions	Functions
24-hour/10-day Independent Expenditure Report (496) – In Development	Common Services – PRD Portal and Audit Logs
24-hour/10-day Contribution Report (497)	System Administration – Link Initiatives & Ballot Measures
Late Payment Report (498) - In System Test	Lobbying Firm Report (625) – In Development
Recipient Committee Campaign Statement (460) – In Development	\$5000 Filer Report (645)
Portal: My Filer/Filer Summary/Registrations/Disclosures – In Development	Void and Reinstate a Lobbyist

- Currently under development
- Requirements: 798 out of 3,353 (24%)

THIRD PARTY SOFTWARE VENDORS



Design sessions completed 10/14 & 10/28:

- Continued to address design questions and review Application Programming Interface (API) specifications
- Reviewed
 - Schedule for testing and certification
 - Vendor identified to participate in the certification process
 - Simplified Output
 - Forms that will be eliminated and merged into other forms

DRAFT SCHEDULE – PHASES FOR PREPARATION AND TESTING



CARS Project Team will work with the Third-Party Vendors who need to Certify through three Phases:

- Phase 1: Pre-certification setup in the Certification Environment (test at least one form)
- Phase 2: Integration Testing/UAT (CARS Project Test team works directly with Third-Party Software Vendor through formal test cases and processes)
- Phase 3: Certification (required for CARS go-live)

Each Vendor must complete all three phases of the process to certify with CARS and be ready for CARS go-live in November 2026.

DRAFT SCHEDULE – PHASES FOR PREPARATION AND TESTING



Timeline:

- By 10/19/25: Vendor to provide contact information, forms to be certified, and test window

Phase 1: Pre-certification Set-up	10/6/25 - 12/19/25
Phase 2: Integration Testing/User Acceptance Testing	2/23/26 - 7/24/26
Phase 3: Certification	8/10/26 - 10/16/26

- Each Vendor must complete all three phases of the process to Certify with CARS for November 2026
- After CARS go-live, no new vendors will be added until February 28, 2027

CARS THIRD PARTY VENDORS



- Aristotle Inc.
- Campaign Deputy
- Capitol WebWorks
- Quorum
- DDC
- DirectFile
- Filpac LLC
- ISPolitical
- NetFile
- NGP VAN
- Pasadena Consulting Group
- Granicus
- Scout Lunar

CARS THIRD PARTY VENDORS

– FORMS AVAILABLE FOR TESTING



Campaign Forms

- Form 400 - Slate Mailer Organization Statement of Organization
- Form 401 - Slate Mailer Organization Campaign Statement
- Form 402 - Slate Mailer Organization Statement of Termination
- Form 461 - Independent Expenditure Committee and Major Donor Committee Campaign Statement
- Form 470 - Officeholder/Candidate Campaign Statements
- Form 470s – Officeholder/Candidate Campaign Statements (Short Form)
- Form 498 – Late Payment Report
- Form 501 - Candidate Intention Statement
- Form 507 – Business Entity Advocacy & Advertisement Statement of Online Activity
- E-530 - Communications Identifying State Candidates
- 410 – Statement of Organization
- 511 – Paid Spokesman

Lobbying Forms

- Form 601 – Lobbying Firm Registration
- Form 602 – Lobbying Firm Activity Authorization
- Form 603 - Lobbyist Employer/Lobbying Coalition Registration Statement
- Form 604 - Lobbyist Certification Statement
- Form 606 - Notice of Termination
- Form 607 - Notice of Withdrawal
- Form 615 – Lobbyist Report
- Form 630 – Payments made to Lobbying Coalitions
- Form 635 - Report of Lobbyist Employer/Lobbying Coalition
- Form 635-C – Payments received Lobbying Coalitions
- Form 640 – Other Payments to Influence Reporting

SIMPLIFIED OUTPUT – LOBBYING



Number	Simplified Output Report	FPPC Forms replaced/merged
Lobbying Registration		
1	Lobbying Firm Registration	FPPC Form 601, Merge 605/606/607
2	Lobbying Firm Authority Authorization	FPPC Form 602
3	Lobbyist Employer Registration	FPPC Form 603, Merge 605/606
4	Lobbyist Certification	FPPC Form 604, Merge 606/607
Lobbying Disclosure		
5	Lobbyist Report	FPPC Form 615, Merge 690
6	Report of Lobbying Firm	FPPC Form 625, Merge 630/690
7	Report of Lobbyist Employer and Report of Lobbying Coalition	FPPC Form 635, Merge 630/635-C/640/690
8	Other Payments to Influence Legislative or Administrative Actions	FPPC Form 645, Merge 640/690
9	SB459 – 72 hour: Issue Lobbying Advertisement Report	Brand New
10	SB459 – 48 hour: End of Session Report	Brand New

SIMPLIFIED OUTPUT – CAMPAIGN



Number	Simplified Output Report	FPPC Forms replaced/Included
Campaign Registration		
11	Statement of Organization Recipient Committee	FPPC Form 410
12	Candidate Intention Statement	FPPC Form 501, Merge 470/470s(AB 808)
13	Statement of Organization (Slate Mailer Organization)	FPPC Form 400, Merge 402
14	Slate Mailer Organization Campaign Statement	FPPC Forms 401
15	Major Donor and Independent Expenditure Committee Campaign Statement	FPPC Form 461
Campaign Disclosure		
16	24-Hour/10-day Independent Expenditure Report	FPPC Form 496
17	24-Hour/10-day Contribution Report	FPPC Form 497
18	Slate Mailer Late Payment Report	FPPC Form 498
19	Limited Liability Company (LLC) Statement of Members	FPPC Form 409
20	Business Entity: Advocacy & Advertisements Statement of Online Activity	FPPC 507
21	Paid Spokesperson Report	FPPC 511
22	Communications Identifying Candidates Issue Advocacy - State Candidates	E-530
23	Recipient Committee Campaign Statement	FPPC Forms 460, Merge 450/425

SIMPLIFIED OUTPUT



Summary of Forms mapped to other Simplified Outputs

- **605** – Amendment to Registration, Lobbying Firm, Lobbyist Employer, Lobbying Coalition
- **606** – Notice of Termination
- **607** – Notice of Withdrawal
- **630** – Payments Made to Lobbying Coalition
- **635-C** – Payments Received by Lobbying Coalition
- **640** – Other Payments to Influence Legislative or Administrative Action
- **402** – Statement of Termination (Slate Mailer Organization)
- **425** – Semi-Annual Statement of No Activity
- **450** – Recipient Committee Campaign Statement (Short Form)
- **470 and 470S** – Officeholder and Candidate Campaign Statement
- **690** – Amendment to Lobbying Disclosure Report

PROGRAM INCREMENT I – FUNCTIONALITY PREVIEW



Functionality Preview

- 48 Hour End-of-Session Lobbying Report
- 72 Hour Issue Lobbying Advertisement Report

Information & Feedback Channels

INFORMATION & FEEDBACK CHANNELS



- Third Party Software Vendor API Meetings held 10/14/25 and 10/28/25
- Next meeting Tuesday, 11/18/25
- Next External Stakeholder Meeting on Wednesday, 12/10/25
- PRD Website for [Quarterly Updates](#)
- Post-meeting survey: [November 12, 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



Shirley N. Weber, Ph.D.
California Secretary of State

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 6, 2023: Details for the July Stakeholder meeting are in the [July 6, 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 6, 2023: Details for the April Stakeholder meeting are in the [April 6, 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