

CARS Project External Stakeholder Meeting

Date: December 10, 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

Michael Laperche, CGI Deputy Project Manager

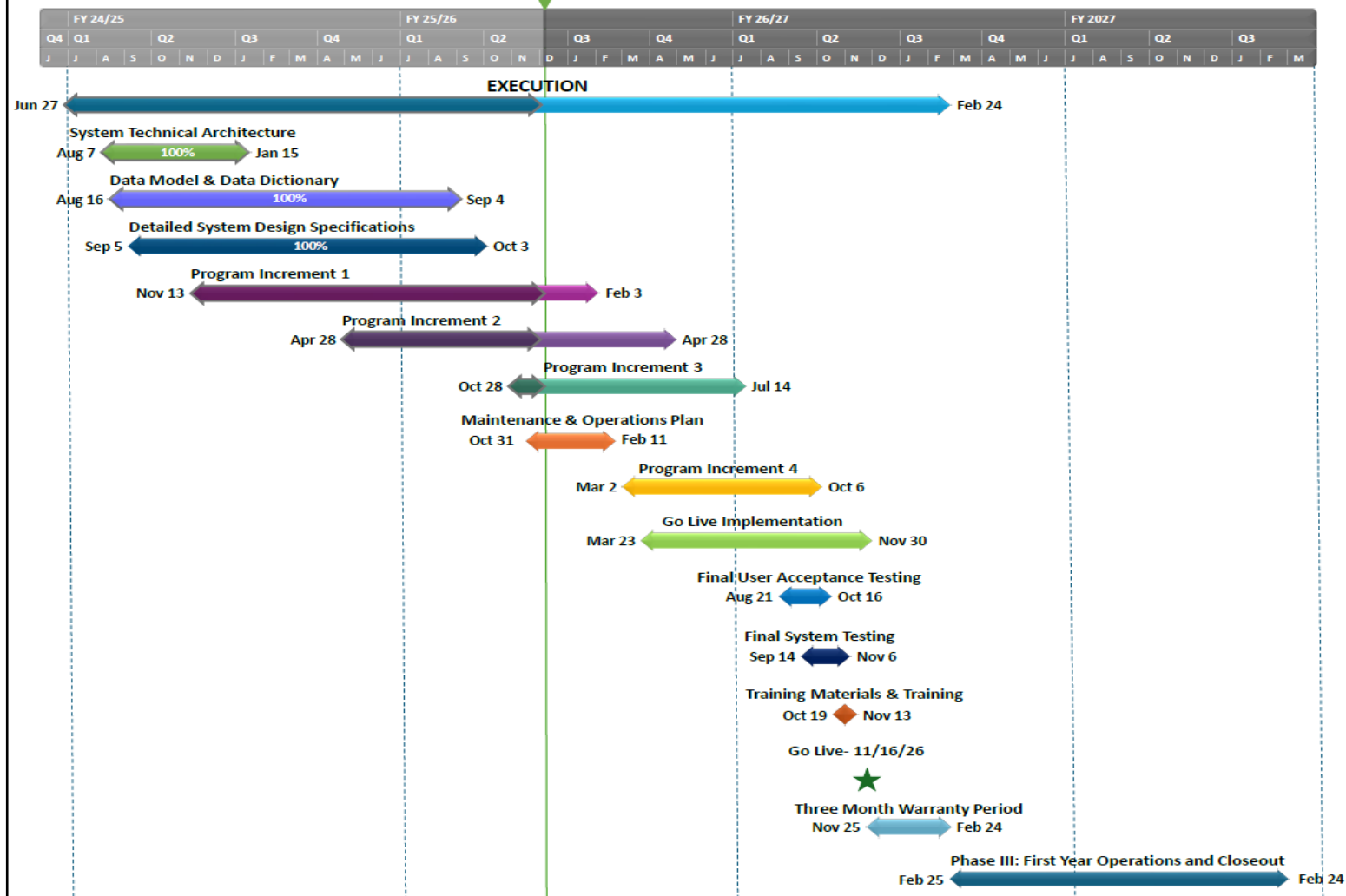
Jim Mason, CGI Business Analyst

Agenda

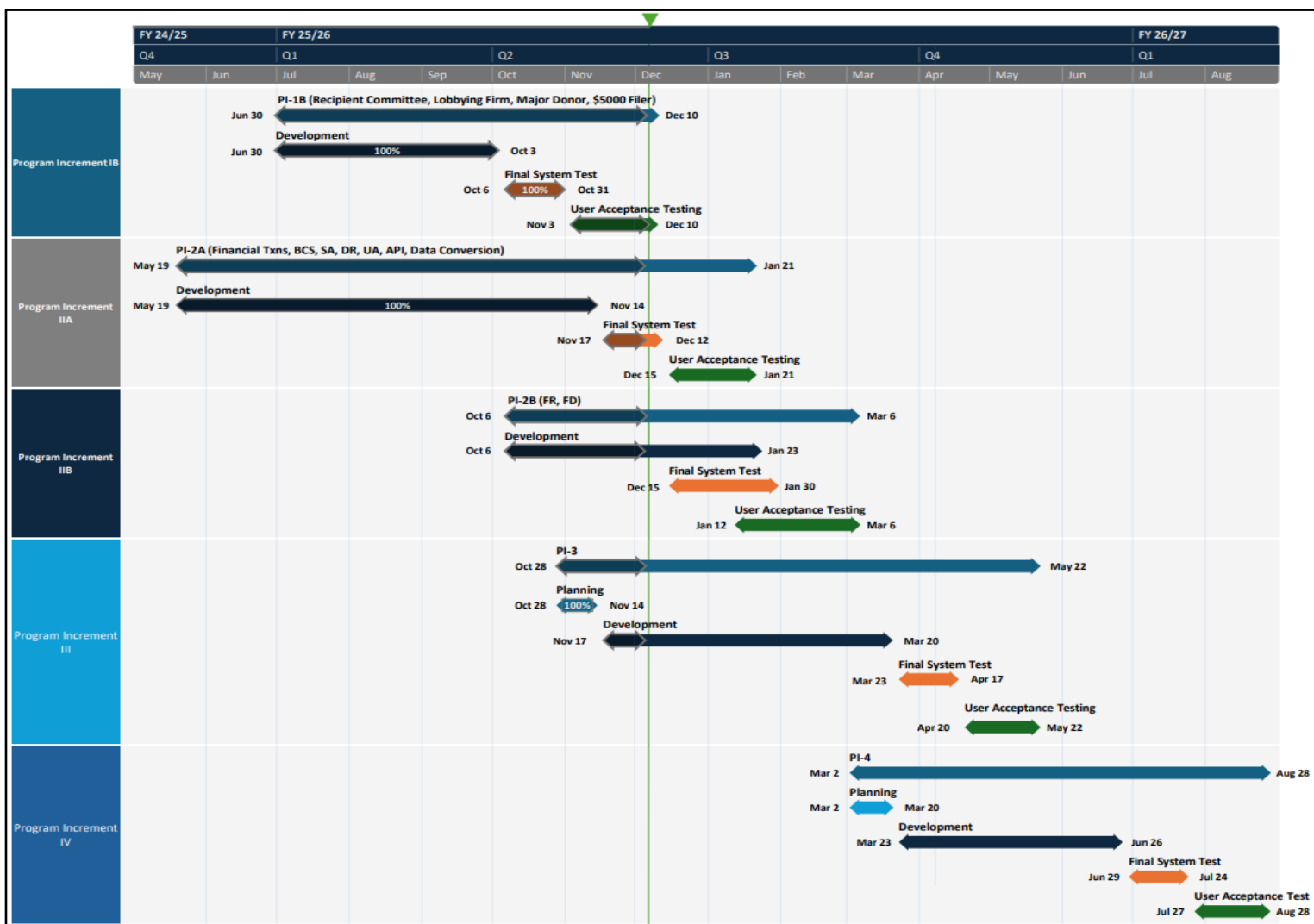
- Project Updates
 - Project Schedule
 - External Stakeholder User Testing Participation
 - Program Increments I & II Activity
 - Third Party Software Vendors
- Functionality Preview
- Q&A

Project Updates

Project Schedule



Project Schedule



EXTERNAL STAKEHOLDER USER TESTING



- Planning for External Stakeholder User Testing is underway.
 - SOS is tracking those who have volunteered to participate.
 - The time frame of testing activities is being determined.
 - Anticipated to begin March 2026.
 - The project will provide pre-testing orientation and training.

INDEPENDENT THIRD-PARTY ASSESSMENTS



- Security assessment for compliance and vulnerability assessment
- The Americans with Disabilities Act/Section 508 testing

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	

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: 724 of 3,243 total requirements included (22%)
- System Testing: 304 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 Software Vendor Interfaces

PROGRAM INCREMENT IB – UAT



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

- Development and Unit Testing Complete:
 - ✓ Requirements: 764 of 3,243 total requirements included (24%)
- System Testing: 185 of 186 Functional test cases passed
- User Acceptance Testing: In Progress 90 out 92 Test Cases passed, target completion 12/10/25
- 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 Spokesperson 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	

- Development and Unit Testing Complete
 - ✓ Requirements: 190 out of 3,243 (6%)
- System Test In-Progress (11/17/25 - 12/12/25)
 - 31 of 48 Functional Test Cases Passed
- User Acceptance Testing target 12/15/25 - 1/21/26
- Training developed and delivered to User Acceptance Testing participants

PROGRAM INCREMENT IIA – DEVELOPMENT



Program Increment II – 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 – [Ready for UAT](#)

FT-04: Cancel an Invoice for a Terminated Entity – [Ready for UAT](#)

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 – [Ready for UAT](#)

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

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

PROGRAM INCREMENT IIA – DEVELOPMENT



Program Increment II – 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 – In 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 – Ready for System Test
UA-05: Recover a Username – Ready for System Test	

PROGRAM INCREMENT IIB – DEVELOPMENT



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

- Currently under development
- Requirements: 770 out of 3,243 (24%)

PROGRAM INCREMENT III – DEVELOPMENT



Functions	Functions
Create a Refund Request (FT-11) – In Development	Generate Financial Reports (FT-17)
Flag a Dishonored Check (FT-14) – In Development	Assess Annual and Registration Fees (FR-18)
Prepare Daily Deposit (FT-08)	Assess Fines (FD-04)
Remove Dishonored Check Flag (FT-16)	PRD Portal Search (Registration/Disclosure)
Approve a Refund Request (FT-12)	PRD Portal Actions (Registrations/Disclosures)
Other Batch Jobs Not Related to Fees/Fines	

- Currently under development
- Requirements: 571 out of 3,243 (18%)

THIRD PARTY SOFTWARE VENDORS



- Continue 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 Software 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 Vendors 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 to be ready for CARS go-live in November 2026.

DRAFT SCHEDULE – PHASES FOR PREPARATION AND TESTING



Timeline:

Phase	Timeline
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 SOFTWARE 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 SOFTWARE 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

PROGRAM INCREMENT I – FUNCTIONALITY PREVIEW



Functionality Preview

- Establishing a Major Donor/Independent Expenditure Filer
- 24 Hour/10-day Independent Expenditure Report
- Major Donor/Independent Expenditure Committee Campaign Statement

Information & Feedback Channels

INFORMATION & FEEDBACK CHANNELS



- Third Party Software Vendor API Meeting held 12/09/2025
 - Next meeting Tuesday, 12/23/2025
- Next External Stakeholder Meeting on Wednesday, 1/14/26
- PRD Website for [Quarterly Updates](#)
- Post-meeting survey: [December 10, 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



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

[Skip to Main Content](#) | [Skip to Footer](#)



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

What can we help you with?

[About](#) [Business](#) [Notary & Apostille](#) [Elections](#) [VCA](#) [Campaign & Lobbying](#) [State Archives](#) [Registries](#) [News](#) [Events](#) [Contact](#)

[Home](#) > [Campaign Finance and Lobbying Activities](#) > [CAL-ACCESS Replacement System Project](#) >
CARS Project Archive

Campaign & Lobbying

[About Political Reform](#)

[History](#)

[Public Services](#)

[Campaign Finance Analysis](#)

[Lobbying Finance Analysis](#)

[Electronic Filing Information](#)

[Campaign Disclosure and Requirements](#)

[Lobbying Disclosure Requirements](#)

[Other Resources](#)

[Contact Us](#)

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 9.12 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



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

Q & A

WRAP UP