

CARS Project External Stakeholder Meeting

Date: May 13, 2026

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 Manager

Agenda

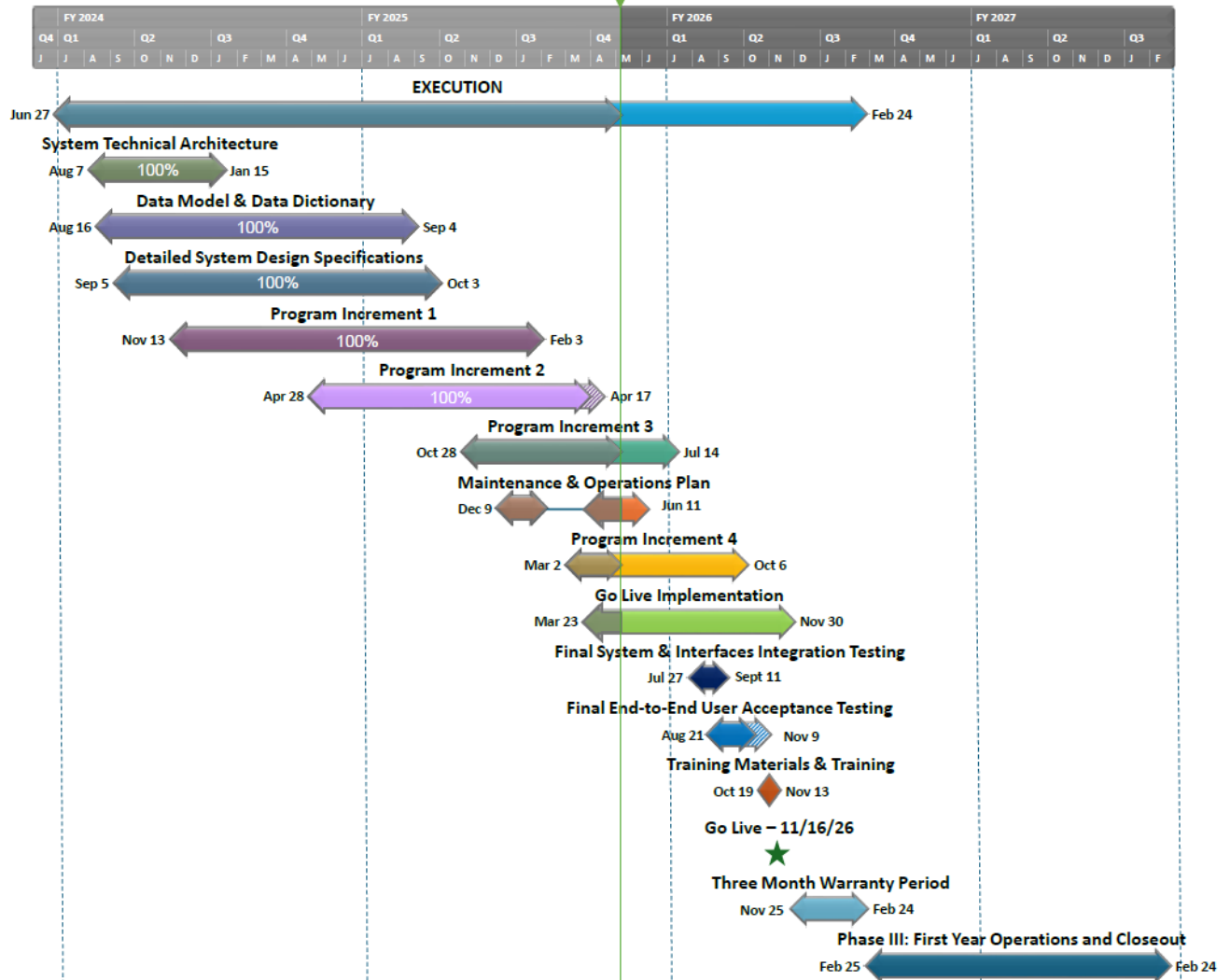
- Project Updates
 - Project Schedule
 - Program Increment III and IV Activity
 - Third-Party Software Vendors
- Notifications Preview
- Simplified Output Preview
- Q&A

Project Updates

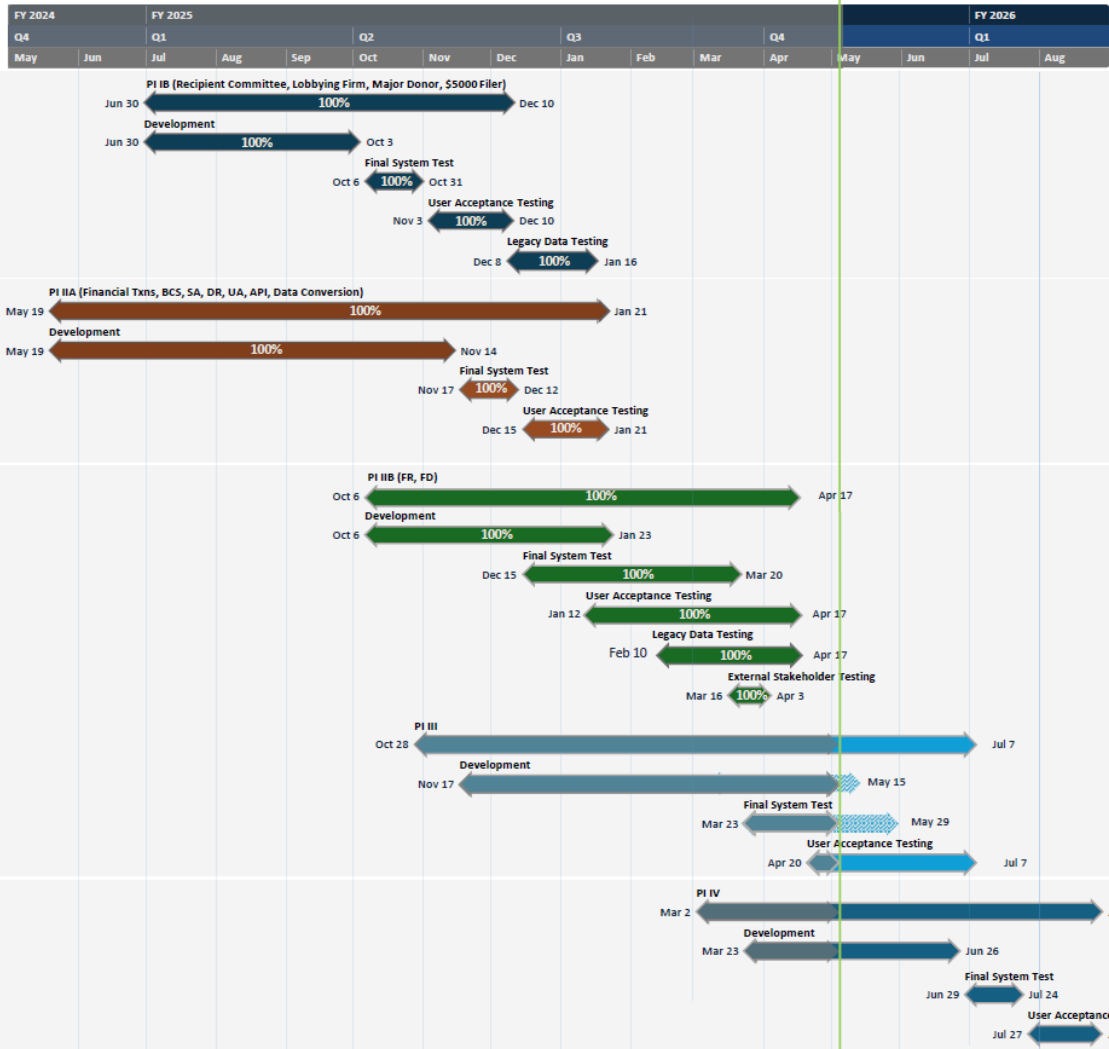


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California Secretary of State

Project Schedule



Project Schedule



INDEPENDENT THIRD-PARTY ASSESSMENTS



- Security assessment for compliance and vulnerability
- Accessibility testing (e.g., American with Disabilities Act, Section 508 of the Rehabilitation Act)

PROJECT SUMMARY



Program Increment	Key Areas	Status
Program Increment I	Filer: Candidate, SMO, Recipient Committee, Major Donor, Lobbyist Employer, Lobbyist, Lobbying Firm, \$5000 Filer (Registrations/Disclosures)	Accepted
Program Increment II	Filer: Remaining Disclosures, Filer Portal Financials: Invoice, Payment, Waivers	Accepted
Program Increment III	Filer: Assess Fees, Fines, Penalties PRD Portal, Correspondence, System Admin Financials: Refund, Reports, Dishonored Check	System Test/UAT – July Acceptance
Program Increment IV	Public Portal, Data Warehouse, Reporting	Development

PROGRAM INCREMENT I – ACCEPTED



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

Campaign	Lobbying
Candidate	Lobbyist Employer/Coalition
State Mailer Organization	Lobbyist
Recipient Committee	Lobbying Firm/\$5000 filer
Major Donor/Independent/Other Specific Campaign Types	

- SOS and Prime Vendor completed Program Increment I final acceptance

PROGRAM INCREMENT I – ACCEPTED



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

- Development and Unit Testing Complete:
 - ✓ Requirements: 1469 of 3,605 (total includes Change Requests) total requirements included (41%)
- System Testing: 490 Functional Test Cases passed
- User Acceptance Testing: 192 Test Cases passed
- Training developed and delivered to User Acceptance Testing participants

KEY PROGRAM INCREMENT I – FUNCTIONALITY ACCEPTED



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 ACCEPTED



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 II – ACCEPTED



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

- Development and Unit Testing complete
 - ✓ Requirements: 922 out of 3,605 (26%)
- System Test completed
 - 256 of 256 functional test cases passed
- User Acceptance Testing and Data Conversion Testing completed
 - 132 of 132 test cases have passed
- Training developed and delivered to User Acceptance Testing participants

PROGRAM INCREMENT IIA – ACCEPTED



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

Financial Transaction

FT-01: Create an Invoice

FT-02: Adjust an Invoice/Re-allocate a Payment

FT-03: Cancel an Invoice

FT-04: Cancel an Invoice for a Terminated Entity

FT-05: Enter and Post an Online (Credit Card) Payment

FT-06: Enter and Post a Manual Payment

FT-07: Cancel a Receipt

FT-09: Create a Waiver Request

FT-10: Process a Waiver Decision

PROGRAM INCREMENT IIA – ACCEPTED



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

System Administration/User Account Management/Common Components

Filer Portal – Common Service/Navigation

SA-01.2: Configure System

SA-01.2A: PRD Portal Common Services/Navigation

BCS7: Job Scheduler

SA-01.2D: Manage Batch Processes

SA-01.2C: PRD Disclosure

PROGRAM INCREMENT IIB – ACCEPTED



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

PROGRAM INCREMENT III – STATUS



Functionality	Functionality
Correspondence	PRD Portal, User Account Management
Fees, Fines and Penalties	Financials (Reports, Refund, Dishonored Check)

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

- Development and Unit Testing in process:
 - ✓ Requirements: 473 out of 3,605 total requirements included (13%)
- Data Conversion Activities – In Process, currently System Testing (208m+ records converted into the CARS DB (Including 1 460 filing w/1.2M txns)
- System Testing: 154 of 218 functional test cases have passed
- User Acceptance Testing: In Process, 8 of 135 test cases passed

PROGRAM INCREMENT III – DEVELOPMENT



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

PROGRAM INCREMENT IV – STATUS



Functionality	Functionality
Data Warehouse/Public Portal/Data Retrieval – In Dev	Retrieving Data APIs
Partner Portal – In Dev	Change Controls – In Dev
System Reports/Simplified Output (23 Reports replace FPPC Forms) – In Dev	Data Archive

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

- Development and Unit Testing in process: 3/23/26 – 6/26/26
 - ✓ Requirements: 741 out of 3,605 total requirements included (21%)
- Data Conversion Activities – In Process
- System Testing: target 6/29/26 – 7/24/26
- User Acceptance Testing: target 7/27/26 – 10/6/26 Acceptance

SIMPLIFIED OUTPUT – CAMPAIGN



Simplified Output Report	Form Number(s)Ref
Statement of Organization Recipient Committee	410
Candidate Intention Statement	501, Merge 470/470s
Statement of Organization (Slate Mailer Organization)	400, Merge 402
Slate Mailer Organization Campaign Statement	401
Major Donor and Independent Expenditure Committee Campaign Statement	461
24-Hour/10-day Independent Expenditure Report	496
24-Hour/10-day Contribution Report	497
Slate Mailer Late Payment Report	498
Limited Liability Company (LLC) Statement of Members	409
Business Entity: Advocacy & Advertisements Statement of Online Activity	507
Paid Spokesperson Report	511
Communications Identifying Candidates Issue Advocacy – State Candidates	E-530
Recipient Committee Campaign Statement	460, Merge 450/425

SIMPLIFIED OUTPUT – LOBBYING



Simplified Output Report	Form Number(s)Ref
Lobbying Firm Registration	601, Merge 605/606/607
Lobbying Firm Authority Authorization	602
Lobbyist Employer Registration	603, Merge 606
Lobbyist Certification	604, Merge 606/607
Lobbyist Report	615, Merge 690
Report of Lobbying Firm	625, Merge 630/690
Report of Lobbyist Employer and Report of Lobbying Coalition	635, Merge 630/635-C/640/690
Report of Persons Spending \$5,000 or More to Influence Legislative or Administrative Action	645, Merge 640/690
72 hour: Issue Lobbying Advertisement Report	SB459
48 Hour: End of Session Report	SB459

THIRD-PARTY SOFTWARE VENDORS



- Continue to address design questions and review Application Programming Interface (API) specifications
- Publish updates to specifications after every Sprint
- Reviewed
 - Schedule for testing and certification
 - Vendors identified to participate in the certification process

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 1: Pre-certification Setup (12 of 13 completed)	10/6/25 – 12/19/25
Phase 2: Integration Testing/User Acceptance Testing (Vendors identify testing time slots)	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
- microPAC

PHASE 2 THIRD PARTY SOFTWARE VENDOR TEST

VENDOR / (FORMS)	April	May	June	July
NGP VAN (9) – Prep Meetings		5/18 – 5/29		
Filpac LLC (1) – Testing Complete	4/20 – 5/1			
DDC (3) – In process		5/4 – 5/15		
Granicus(8) – Prep Meetings		5/18 – 5/29		
Pasadena Consulting Group(13) – Prep Meetings		5/18 – 6/5		
Aristotle (4)			6/1 – 6/12	
ISPolitical(23)			6/1 – 6/26	
NetFile(23)			6/1 – 6/12	7/7 – 7/21
Campaign Deputy(6)			6/15 – 6/26	
Quorum(5)			6/15 – 6/26	
Capitol WebWorks(12)				7/6 – 7/17
DirectFile(7)				7/19 – 7/30
Scout Lunar(2)				7/6 – 7/17
microPAC (7)				

CARS THIRD-PARTY SOFTWARE VENDORS – FORMS AVAILABLE FOR TESTING



Campaign Forms

- Form 400/402 - Slate Mailer Organization Statement of Organization
- Form 401 - Slate Mailer Organization Campaign Statement
- Form 409 – Limited Liability Company (LLC) Statement of members
- Form 460/450/425 – Recipient Committee Campaign Statement
- Form 461 - Independent Expenditure Committee and Major Donor Committee Campaign Statement
- Form 496 – 24 hr/10 day Independent Expenditure Report
- Form 498 – Late Payment Report
- Form 501/470/470S - 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 601/605/606/607 – Lobbying Firm Registration
- Form 602 – Lobbying Firm Activity Authorization
- Form 603/606/607 - Lobbyist Employer/Lobbying Coalition Registration Statement
- Form 604/606/607 - Lobbyist Certification Statement
- Form 615/690 – Lobbyist Report
- Form 625/690 – Report of Lobbying Firm
- Form 630 – Payments made to Lobbying Coalitions
- Form 635/630/635-c/640/690 - Report of Lobbyist Employer/Lobbying Coalition
- Form 645/640/690 – Report of \$5000 Filer

**2 remaining to be developed – (2) SB459 (CR-035),
not required until Jan. 2028**

NOTIFICATIONS PREVIEW



- Updated "First Fine Notice" Correspondence Template
- Dynamic fields auto-populate key filing and fine data
- Includes filing type, deadlines, document ID, and fine amount
- Streamlined and modernized notice format
- Added direct payment guidance through the invoices dashboard
- Maintains PRD Public Area contact option for payment assistance and questions
- Designed to improve clarity, consistency, and efficiency

SIMPLIFIED OUTPUT PREVIEW



- Available to preview a filing before submission
- Available to review what was submitted
- Viewable on the public portal as record of a filing
- Viewable in the filer portal, PRD staff portal, and partner agency portal
- In addition to the transactional and filer data available for reporting



STATE OF CALIFORNIA
Office of the Secretary of State

SLATE MAILER ORGANIZATION
REGISTRATION

ORGANIZATION INFORMATION

Name	Email	Phone Number		
ABC Flags	ABCFlags@westdata.com	(916) 123-2345		
Street Address	Address Type	Mailing Address (if different)	Address Type	
316 10 th Street, Sacramento, CA 95814	Business	PO Box 123 Sacramento, CA 95814		

ORGANIZATION DETAILS

Activity Level	Qualified	Date Qualified
State	Yes	02/01/2026

Is this organization also a campaign committee?	Committee ID	Recipient Committee
Yes	1428996	ABC School Parents for Ed

OFFICERS INFORMATION

Officer Title	Name	Email	Phone Number	Address	Address Type
Treasurer	Kay Cady	Kcady@west.com	(916) 123-6789	446 Alta Rd., San Diego, CA, 92158	Business
CEO	Chris Turner	CTurner@datanet.com	(916) 456-2345	446 Alta Rd., San Diego, CA, 92158	Business

INDIVIDUALS WHO AUTHORIZE A MAILER'S CONTENT

Name	Phone Number	Address	Address Type
Kay Cady	(916) 123-4567		

TREASURER ACKNOWLEDGEMENT

I acknowledge under penalty of perjury that I must comply with all applicable duties stated in the Political Reform Act and the regulations of the Commission and that a violation of these duties could result in criminal, civil, or administrative penalties.

Executed On: _____ Name: _____ Title: _____

VERIFICATION

I have used all reasonable diligence in preparing this statement. I have reviewed this statement, and, to the best of my knowledge, the information contained in it is true and complete. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed On: 03/06/2026 04:14:55 Name: John Doe Title: Yes

-FILED-



STATE OF CALIFORNIA
Office of the Secretary of State

SLATE MAILER ORGANIZATION
REGISTRATION

Filer ID: 1122334
Filing ID: 9988776655
Original Filing Date: 02/01/2026 HH:MM:SS
Last Amended: 02/06/2026 HH:MM:SS

X Amendment Date Terminated: MM/DD/YYYY

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Information & Feedback Channels



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INFORMATION & FEEDBACK CHANNELS



- Next Third-Party Software Vendor API Meetings will be held on Tuesday 5/12/2026 and 5/26/2026 at 10:30 a.m.
- Next External Stakeholder Meeting on Wednesday, 6/10/2026 at 1:30 p.m.
- PRD Website for [Quarterly Updates](#)
- Post-meeting survey: [May 13, 2026](#)



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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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 20, 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 8, 2023: Details for the April Stakeholder meeting are in the [April 8, 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