

CARS Project External Stakeholder Meeting

Date: July 8, 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

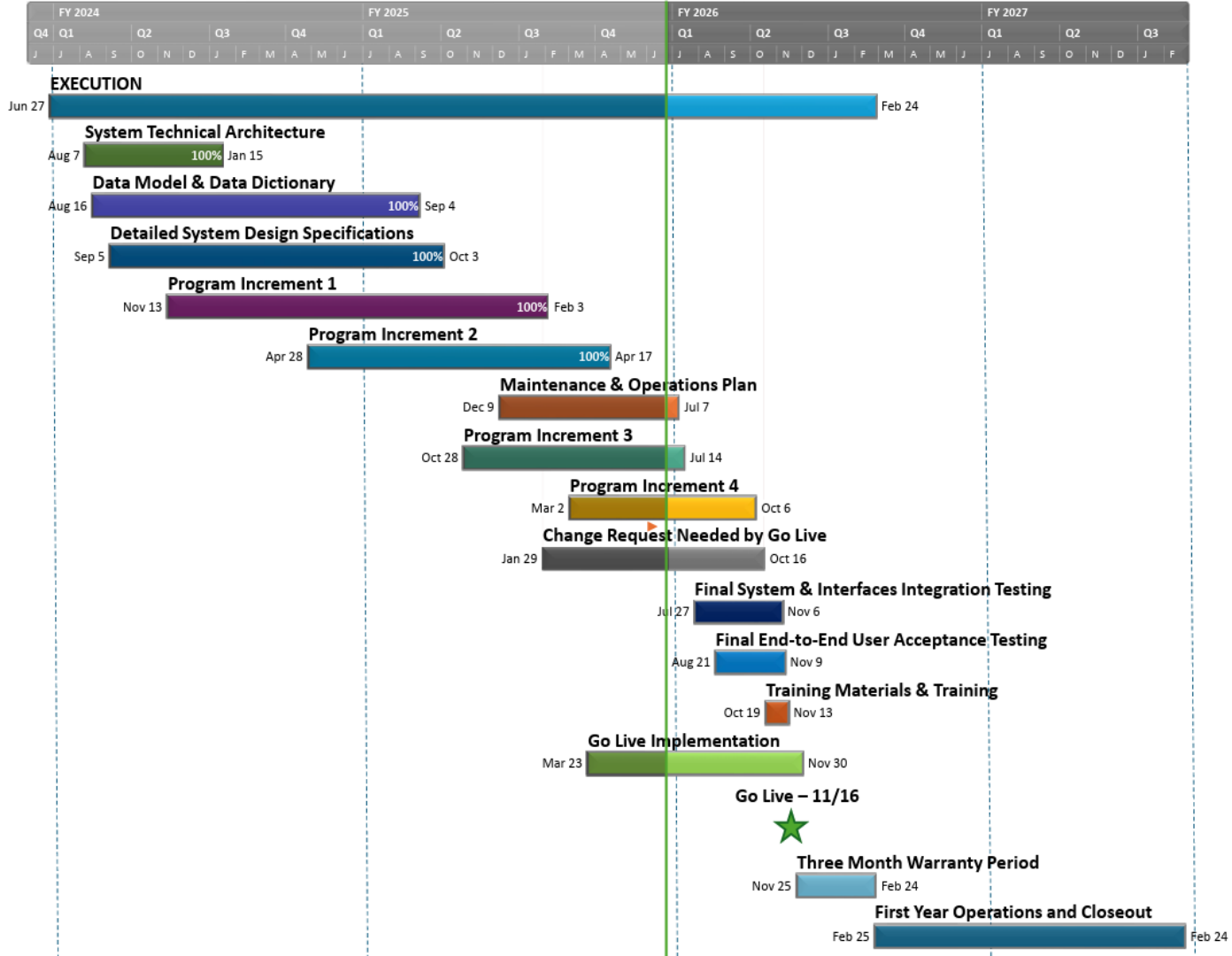
Denise Tower, CGI Project Director

Agenda

- Project Updates:
 - Project Schedule
 - Program Increment III and IV Activities
 - Third-Party Software Vendors
- Preview: Public Portal
- Q&A

Project Updates

Project Schedule



OTHER CARS ACTIVITIES



- Monthly Project Newsletters
- Preparation for next round of External Stakeholder User Testing
- Planning for Final End-to-End User Acceptance Testing

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	UAT – July Acceptance
Program Increment IV	Public Portal, Data Warehouse, Reporting	Split into Core and Non-core Development

PROGRAM INCREMENT III – STATUS



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

Activities: User Acceptance Testing

- Development and Unit Testing in process:
 - ✓ Requirements: 450 out of 3,336 total requirements included (13%), excludes Change Requests
- Data Conversion Activities – In Process, currently System Testing (213.5m+ records converted into the CARS DB (Including 1-460 filing w/1.2M txns)
- System Testing: 234 of 234 functional test cases have passed
- User Acceptance Testing: In Process, 72 of 169 test cases passed, target acceptance is July

PROGRAM INCREMENT III – UAT



Functions	Functions
Create a Refund Request (FT-11)	Generate Financial Reports (FT-17)
Flag a Dishonored Check (FT-14)	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	Correspondence

PROGRAM INCREMENT IV – STATUS



Functions	Functions
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: 490 out of 3,336 total requirements included (15%), excludes Change Controls

PROGRAM INCREMENT IV – STATUS



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

- Change Controls and Remaining features split into Core (impacts the Database, Calculations, flows to complete a filing, third party Software Vendor APIs, CRs(15)) and Non-Core (pulling data out of the system – Reports, Public portal searches and Dashboards, CRs(2))
- Core Development target to complete by August 7th
- Final End-to-End System Testing and User Acceptance Testing begins August 10th, Target Acceptance October

SIMPLIFIED OUTPUT – CAMPAIGN



Simplified Output Report	Form Number(s) Ref	Status
Statement of Organization Recipient Committee	410	PRD – Ready for Approval
Candidate Intention Statement	501, Merge 470/470s	PRD – Accepted FPPC – Reviewed In Development (unredacted ready for test)
Statement of Organization (Slate Mailer Organization)	400, Merge 402	PRD – Accepted FPPC – Reviewed In Development(unredacted ready for test)
Slate Mailer Organization Campaign Statement	401	PRD – Ready for Approval FPPC – Reviewed In Development(unredacted ready for test)
Major Donor and Independent Expenditure Committee Campaign Statement	461	PRD – Ready for Approval FPPC – Reviewed In Development

SIMPLIFIED OUTPUT – CAMPAIGN



Simplified Output Report	Form Number(s) Ref	Status
24-Hour/10-day Independent Expenditure Report	496	PRD – Ready for Approval FPPC – Reviewed In Development(unredacted ready for test)
24-Hour/10-day Contribution Report	497	PRD – Ready for Approval FPPC – Reviewed In Development(unredacted ready for test)
Slate Mailer Late Payment Report	498	PRD – Ready for Approval FPPC – Reviewed In Development(unredacted ready for test)
Limited Liability Company (LLC) Statement of Members	409	PRD – Ready for Approval FPPC – Reviewed In Development(unredacted ready for test)

SIMPLIFIED OUTPUT – CAMPAIGN



Simplified Output Report	Form Number(s) Ref	Status
Business Entity: Advocacy & Advertisements Statement of Online Activity	507	PRD – Ready for Approval FPPC – Reviewed In Development(unredacted ready for test)
Paid Spokesperson Report	511	PRD – Ready for Approval FPPC – Reviewed In Development(unredacted ready for test)
Communications Identifying Candidates Issue Advocacy – State Candidates	E-530	PRD – Ready for Approval FPPC – Reviewed In Development(unredacted ready for test)
Recipient Committee Campaign Statement	460, Merge 450/425	PRD – Ready for Approval

SIMPLIFIED OUTPUT – LOBBYING



Simplified Output Report	Form Number(s) Ref	Status
Lobbying Firm Registration	601, Merge 605/606/607	PRD – Accepted FPPC – Reviewed In Development(unredacted ready for test)
Lobbying Firm Authority Authorization	602	PRD – Accepted FPPC – Reviewed In Development(unredacted ready for test)
Lobbyist Employer Registration	603, Merge 606	PRD – Accepted FPPC – Reviewed In Development(unredacted ready for test)
Lobbyist Certification	604, Merge 606/607	PRD – Accepted FPPC – Reviewed In Development(unredacted ready for test)

SIMPLIFIED OUTPUT – LOBBYING



Simplified Output Report	Form Number(s) Ref	Status
Lobbyist Report	615, Merge 690	PRD – Accepted FPPC – Reviewed In Development(unredacted ready for test)
Report of Lobbying Firm	625, Merge 630/690	PRD – Ready for Approval FPPC – In Review In Development
Report of Lobbyist Employer and Report of Lobbying Coalition	635, Merge 630/635- C/640/690	PRD – Ready for Approval FPPC – In Review In Development
Report of Persons Spending \$5,000 or More to Influence Legislative or Administrative Action	645, Merge 640/690	PRD – Ready for Approval FPPC – In Review In Development
72 hour: Issue Lobbying Advertisement Report	SB459	After Go-Live
48 Hour: End of Session Report	SB459	After Go-Live

DATA CONVERSION



Date	Legacy Schema Record Count	CARS Schema Record Count	Total Record Count
2/24/2026	85,857,882	15,589,494	101,447,376
4/27/2026	87,952,886	121,011,757	208,964,643
5/27/2026	87,952,886	125,578,442	213,531,328
6/12/2026	87,952,886	126,148,737	214,101,623
7/7/2026	92,666,781	127,336,936	220,003,717

Note: 440K+ filings are available in CARS for Amending by filers

THIRD-PARTY SOFTWARE VENDORS



- Continue twice monthly meetings to address Application Programming Interface (API) questions and review API specifications
- Publish updates to specifications after every Sprint
- Weekly checkpoints with Vendors testing

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 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 after February 28, 2027

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**

PHASE 2 THIRD PARTY SOFTWARE VENDOR TEST SCHEDULE

VENDOR / FORMS	Status	April	May	June	July
NGP VAN 9	Testing In Process		5/18 – 5/29		7/6 – 7/17
Filpac LLC 1	Done/Informal Testing	4/20 – 5/1			
DDC 3	Testing In Process		5/4 – 5/15		
Granicus 8	Testing In Process		5/18 – 5/29		
Pasadena Consulting Group 13	Testing In Process			6/22 – 7/12	
Aristotle 4	Postponed			6/22 – 7/12	
ISPolitical 23	Testing In Process			6/1 – 6/26	
NetFile 23	Testing In Process			6/1 – 6/12	7/7 – 7/21
Campaign Deputy 6	Testing In Process			6/15 – 6/26	
Quorum 5	Testing In Process			6/22 – 6/30	7/20 – 7/31
Capitol WebWorks 12	Testing In Process				7/6 – 7/17
DirectFile 7	Postponed				7/6 – 7/17
Scout Lunar 2	Testing In Process				7/6 – 7/17
microPAC 7	Not Started				

THIRD PARTY VENDOR TEST EXECUTION STATUS



Forms	Status
501: Candidate Intention	Successful submissions, making updates to the payload based on CR work. Actively testing
400: Slate Mailer Organization	Successful submissions. Actively testing
401: SMO Campaign Statement	Successful submissions. Actively testing
603: Lobbyist Employer Registration	Successful submissions. Actively testing
604: Lobbyist Certification	Successful submissions. Actively testing
605(603/604): Amendments	
606: Notice of Termination	
607: Notice of Withdrawal	
615: Lobbyist Report	Successful submissions. Actively testing
635/635-C/630/640: Report of Lobbyist Employer/Coalition	Successful submissions. Actively testing
410: Recipient Committee Statement of Organization	Successful submissions. Actively testing
461: Major Donor/Independent Expenditure Committee Campaign Statement	Successful submissions. Actively testing

- Continue to test variations with the various forms
- Addressing bugs and questions to complete the payloads
- Regular checkpoints with Vendors actively testing

THIRD PARTY VENDOR TEST EXECUTION STATUS



Forms	Status
511: Paid Spokesperson Report	Successful submissions. Actively testing
498: Late Payment Report (SMO)	Successful submissions. Actively testing
601: Lobbying Firm Registration	Successful submissions. Actively testing
402 SMO Statement of Termination	
460/450/425: Recipient Committee Campaign Statement	Successful submissions, making updates to the payload based on CR work. Actively testing
496: 24-hour/10-day Independent Expenditure Report	Successful submissions. Actively testing
645/640: Report of \$5,000 Filer & Other Payments to Influence Reporting	Successful submissions. Actively testing
625/630: Report of Lobbying Firm & Payments Made to Lobbying Coalitions	Successful submissions. Actively testing
E-530: Communications Identifying State Candidates	Successful submissions. Actively testing
497: 24-hour Contribution Report	Successful submissions. Actively testing
409: Limited Liability Company (LLC) Statement of Members	
507: Business Entity: Advocacy & Advertisements Statement of Online Activity	

CARS PREVIEW



Simplified Output

- Lobbying Firm Registration (601)
- Lobbyist Report (615)

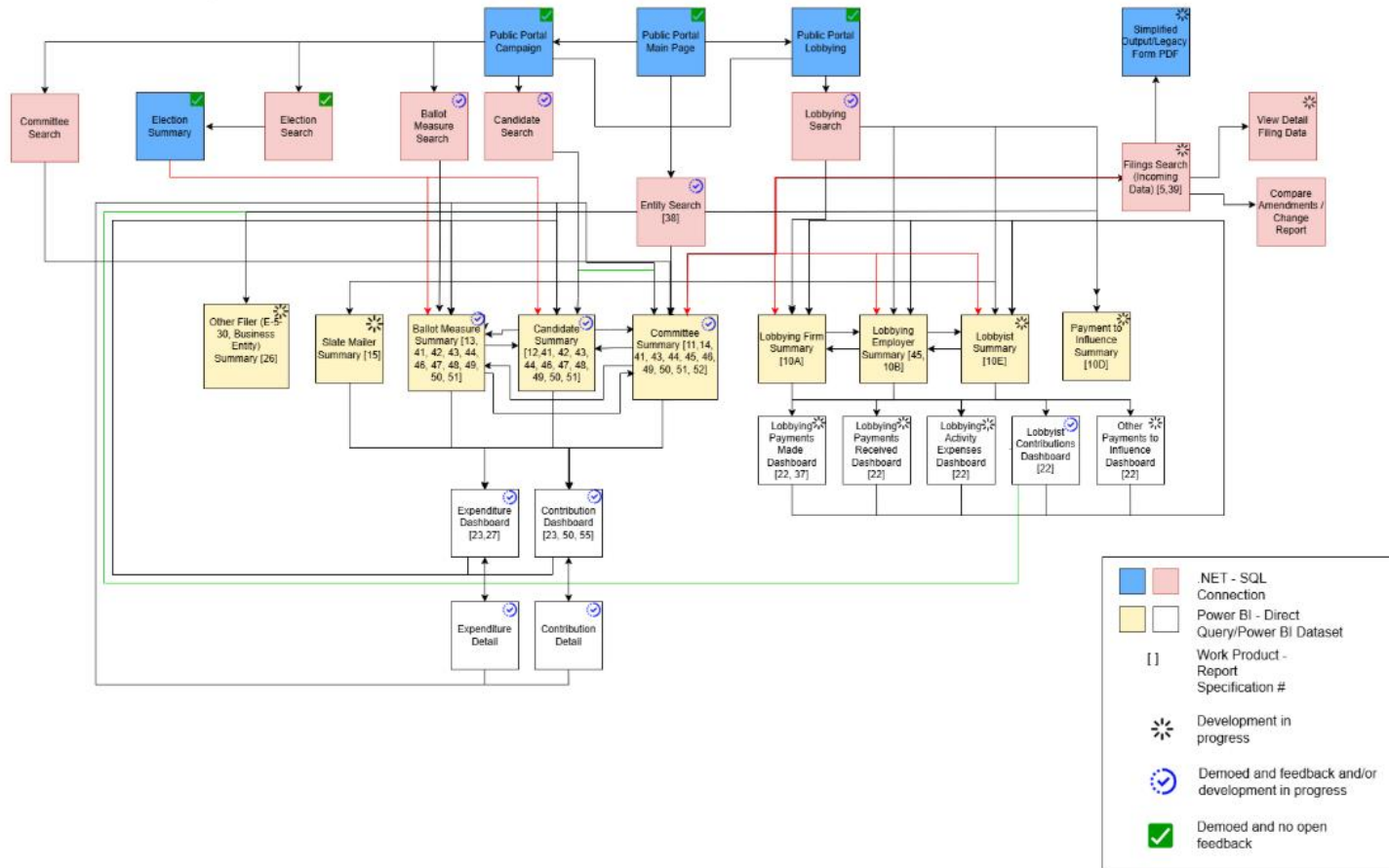
Public Portal

- Candidate Summary
- Lobbying Entity Search

Public Portal Site Map

Thompson, Madison Jun 29

Public Portal Site Map



QUESTIONS/FOLLOW-UPS



- Public Portal: Are we going to see intermediaries in CARS, like ActBlue?
 - Update: Yes, CARS does track intermediaries, we are working with PRD to identify the appropriate Public Portal dashboards and reports to show this information. We will demo once it is available.

QUESTIONS/FOLLOW-UPS



- California Political Treasurers Association Annual Conference on June 26:
 - Implementation concern: Third Party Vendors – All entities having to register in CARS at "go live."
 - Update: Investigating ways to work with Third Party Vendors to semi-automate the process and eliminate the requirement to sign into CARS. We will provide an update at the next meeting.
 - Testing:
 - We need your help with Testing.

IMPLEMENTATION



- Implementation Committee for External Stakeholders
 - Purpose: To work with the CARS project team on pre-go live, go live and post-go live implementation tasks (Communications, set-up, Day 1 steps/activities, etc.)
 - Looking for volunteers, meetings start in September

Information & Feedback Channels

Q&A PARKING LOT

July 8, 2026 – Questions

-
-
-

INFORMATION & FEEDBACK CHANNELS



- Next Third-Party Software Vendor API Meetings will be held on Tuesday 7/28/2026 and 8/11/2026 at 10:30 a.m.
- Next External Stakeholder Meeting on Wednesday, 8/12/2026 at 1:30 p.m.
- PRD Website for [Quarterly Updates](#)
- Post-meeting survey: [July 8, 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



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](#)
- [Ballot Measure Total Contributions](#)



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](#).

- June 10, 2026:** Details for the monthly June Stakeholder meeting are in the [June 10, 2026, CARS Project External Stakeholder Meeting PowerPoint](#).
- June 8, 2026:** Please take a few minutes to read our June newsletter, the [CARS Stakeholder Bulletin](#). It contains a few words from our Project Leadership Team, CARS Project updates and accomplishments, and a look ahead at our

CARS Project Archive



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

[Home](#) ▶ [Campaign & Lobbying](#) ▶ [Helpful Resources](#) ▶ [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

- [2019 Draft version 1.07 of the CAL-ACCESS XML file specifications document \(XSD\)\(ZIP\)](#)
- [2019 Draft version 0.12 of the CAL Access Application Programming Interface \(API\) Requirements\(PDF\)](#)
- [2017 CAL-ACCESS Replacement Project System Integrator Vendor Request for Offer](#)
- [2015 S1BA \(PDF\)](#)
- [2012 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 10, 2020, CARS Software Vendor-Service Provider Meeting](#)
- [July 8, 2020, CARS Software Vendor-Service Provider Meeting](#)

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

Appendix

PROGRAM INCREMENT I – ACCEPTED



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

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 3,336 (excludes Change Requests) total requirements included (44%)
- 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: 927 out of 3,336 (28%), excludes Change Requests
- 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	