CARS Project
External Stakeholder Meeting



Date: November 04, 2026
Time: 1:30 p.m. to 2:30 p.m.

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

Welcome and Introductions

Margie Hieter, Project Sponsor

Harjit Basi, Project Director

John Heinlein, Assistant Project Director

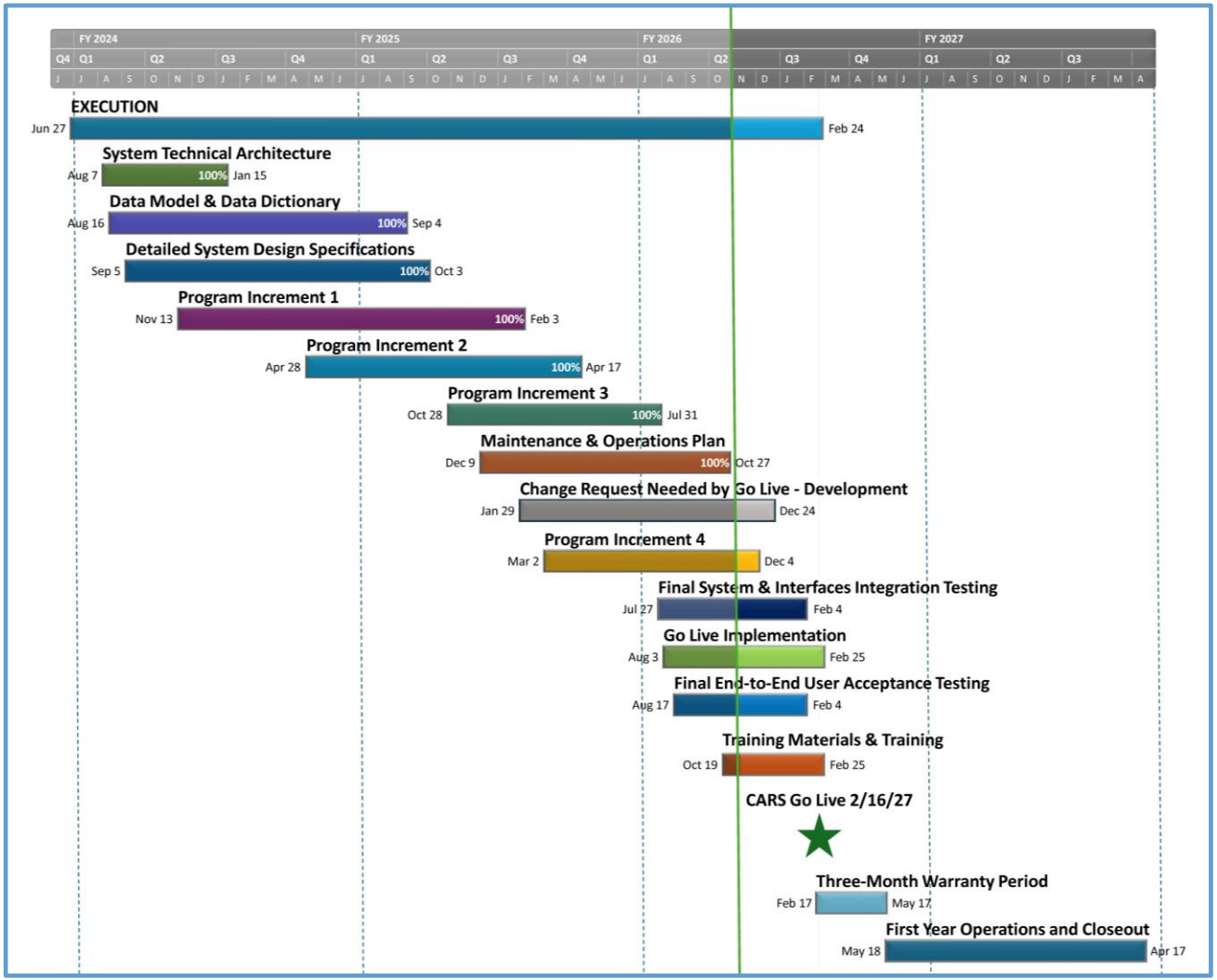
Denise Tower, CGI Project Director

Agenda

- Project Updates:
  - Project Schedule
  - Program Increment IV and Change Request Activities
  - Third-Party Software Vendors
  - September External User Testing
  - Micro Learning Videos
- Preview: TBD
- Q&A

Project Updates

Project Schedule



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POLITICAL REFORM DIVISION
CALIFORNIA SECRETARY OF STATE

PROJECT SUMMARY

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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	Accepted
Program Increment IV	Public Portal, Data Warehouse, Reporting	Development/System Test/UAT
Change Controls	24 Required for Go Live that impact the CARS app (7 new added)	In Progress

REQUIREMENTS

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Program Increment	Extended Req'ts	% of Total Req'ts	Status
Program Increment I	1480	44.0%	Accepted
Program Increment II	938	27.9%	Accepted
Program Increment III	444	13.2%	Accepted
Program Increment IV	494	14.7%	192 Accepted, 170 in Test
Implementation	5	0.1%	
Total	**3361**	**100%**	
Change Control	564		177 Accepted, 215 in Test
Grand Total	**3925**		

- Accepted/Built Removed: 3,203 + 25 = 3,228 of 3925 82% of all requirements accepted
- Another 387 in test (10%)

PROGRAM INCREMENT IV – STATUS

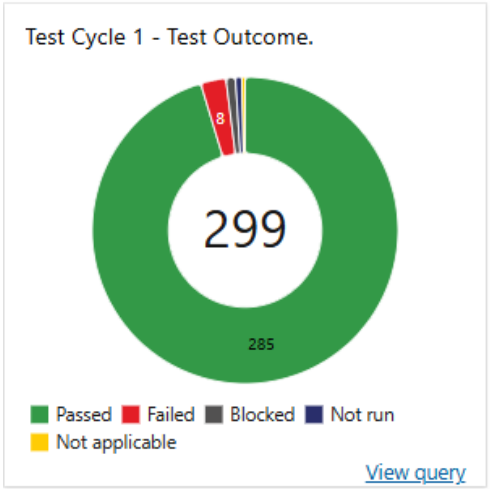
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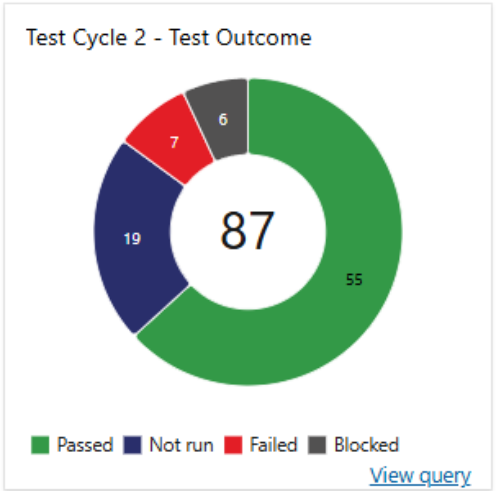
Functions	Functions
Data Warehouse/Public Portal/Data Retrieval Development/System Test/UAT	Retrieving Data APIs – Development/System Test/UAT
Partner Portal – UAT	
System Reports - Development/System Test/UAT	

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

- Development and Unit Testing/System Test/UAT in process: 3/23/26 – 12/04/26
  - ✓ Requirements: 494 out of 3,361 total requirements included (15%), excludes Change Controls
  - ✓ 122 of 159 functional test cases passed (77%)
  - ✓ UAT in progress (See Next Slide)

PI IV USER ACCEPTANCE TESTING AND END-TO-END TESTING





- Continue testing and will add another Test Cycle once new CRs are complete

PROGRAM INCREMENT CHANGE CONTROLS

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

- Change Controls required for Go Live (24)
- 7 new functional Change Controls approved in October
- Status
  - 7 – Accepted, 8 – UAT, 1 – System Test, 6 – Development, 2 – Not Started

PROJECT – ADDITIONAL ACTIVITIES

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- Implementation Planning
  - Coordinated effort between Prime Vendor, ITD and PRD
  - Bi-Weekly Meeting
- Preparing Help Documentation for the CARS Application
- Executing final Data Conversion practice runs and the migration of Legacy Correspondence and Lobbyist Photos in CARS
- Final End-to-End System Testing started August 10th, Target Acceptance January
- Final End-to-End UAT begins August 17th, Target Acceptance January

DATA CONVERSION

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Date	Legacy Schema Record Count	CARS Schema Record Ccount	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
7/13/2026	90,058,552	138,511,720	228,570,272
7/27/2026	90,058,552	166,046,535	256,105,087
8/10/2026	90,058,552	169,278,961	259,337,513
8/14/2026	94,001,216	180,675,804	274,677,020
8/24/2026	94,001,216	181,541,034	275,542,250
9/7/2026	94,001,216	186,727,574	280,728,790
9/21/2026	94,001,216	188,453,438	282,454,654
10/5/2026	94,001,216	191,655,964	285,657,180

- Items completed in PI IV
  - Financial Tables
  - Correspondence
  - Lobbyist Photos

THIRD-PARTY SOFTWARE VENDORS

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

DRAFT SCHEDULE – PHASES FOR PREPARATION AND TESTING

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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 – 9/4/26, extended
Phase 3: Certification	1/04/27 - 1/30/27

- Each Vendor must complete all three phases of the process to certify with CARS for February 2027 Go Live
- After CARS go-live, no new vendors will be added until after May 16, 2027

THIRD-PARTY SOFTWARE VENDORS – FORMS AVAILABLE FOR TESTING

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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

THIRD PARTY SOFTWARE VENDORS

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3rd Party SW Vendor (Forms)	Status
Aristotle (4)	Successful submission all forms, continuing to test
Capital Webworks (12)	Done
Campaign Deputy (6)	Successful submission of all forms, continuing to test
Directfile (6)	Done
DDC (3)	Successful submission of all forms, continuing to test
Filpac LLC (1)	Done
Granicus (7)	Successful submission of 5 forms, continuing to test

3rd Party SW Vendor (Forms)	Status
ISPolitical (21)	Successful submissions on 20 forms, continuing to test, working issues
Netfile (21)	Successful submissions on 21 forms, continuing to test
NGP VAN (9)	Done
Pasadena Consulting Group (13)	Done
Public Affairs Support Services (2)	Successful submission of all forms, continuing to test
Quorum (5)	Successful submission of all forms, continuing to test
Scout Lunar (13)	Done

EXECUTION STATUS BY FORM

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Form	Description	Vendors Signed Off	Status
497	24-Hour Contribution Report	12/12	
460/450/425	Recipient Committee Campaign Statement	13/14	Granicus is continuing with testing.
496	24-Hour/10-Day Independent Expenditure Report	10/10	
461	Major Donor/IE Committee Campaign Statement	12/13	Granicus is continuing with testing.
501	Candidate Intention	7/8	ISPolitical is continuing with testing.
410	Recipient Committee Statement of Organization	10/10	
498 (SMO)	Late Payment Report	6/6	
511	Paid Spokesperson Report	5/5	
E-530	Communications Identifying State Candidates	4/4	
409	LLC Statement of Members	4/4	

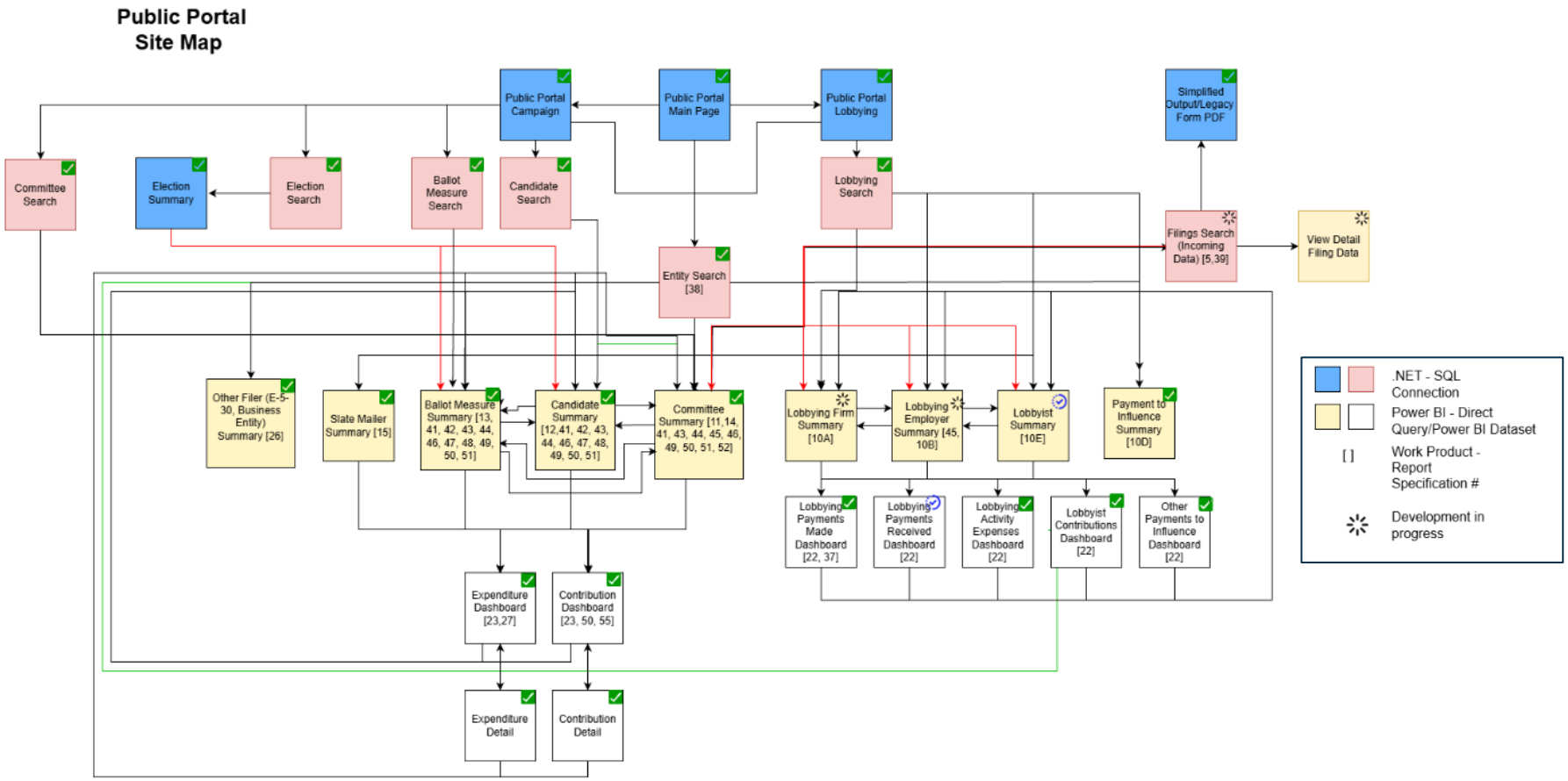
EXECUTION STATUS BY FORM

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Form	Description	Vendors Signed Off	Status
507	Business Entity: Advocacy & Ads — Online Activity	4/4	
400	Slate Mailer Organization	4/5	ISPolitical is continuing with testing.
615	Lobbyist Report	3/3	
645/640	Report of $5,000 Filer & Other Payments to Influence Reporting	2/3	ISPolitical is continuing with testing.
625/630	Report of Lobbying Firm & Payments to Lobbying Coalitions	3/3	
401	SMO Campaign Statement	4/5	ISPolitical is continuing with testing.
635/635-C/630/640	Report of Lobbyist Employer/Coalition	2/3	ISPolitical is continuing with testing.
601	Lobbying Firm Registration	2/3	ISPolitical is continuing with testing.
602	Lobbying Firm Activity Authorization	3/3	
603	Lobbyist Employer Registration	2/3	ISPolitical is continuing with testing.
604	Lobbyist Certification	2/3	ISPolitical is continuing with testing.

Public Portal Site Map

Thompson, Madison Oct 18



Preview of Micro Learning Training Videos

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MICRO LEARNING TRAINING VIDEOS

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- Creating a CARS User Account
- User Account Management

Information & Feedback Channels

INFORMATION & FEEDBACK CHANNELS

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- Next Third-Party Software Vendor API Meetings will be held on Tuesday 11/10/2026 and 11/24/2026 at 10:30 a.m.
- Next External Stakeholder Meeting on Wednesday, 12/09/2026 at 1:30 p.m.
- PRD Website for Quarterly Updates
- CARS Go-Live Resources Webpage
- Post-meeting survey: November 4, 2026

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Visit the CARS Project website

CAL-ACCESS Replacement System Project

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

CARS Project Email Address

Submit questions and comments to the CARS project team:

PRDCARS@sos.ca.gov

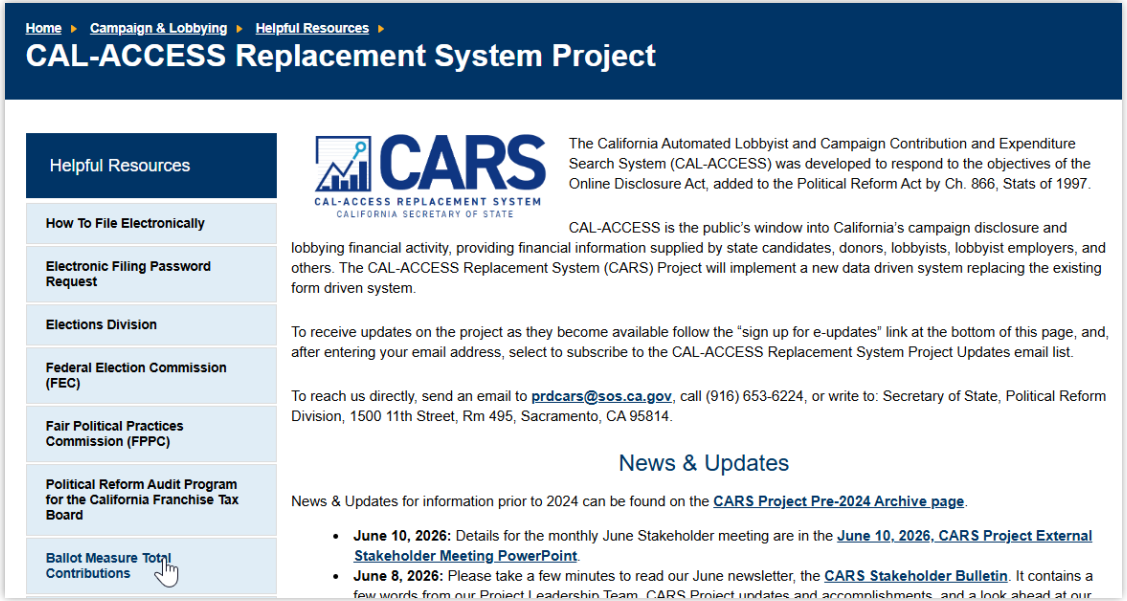
Visit the CARS Go-Live Updates website

CAL-ACCESS Replacement System (CARS) Go-Live Updates

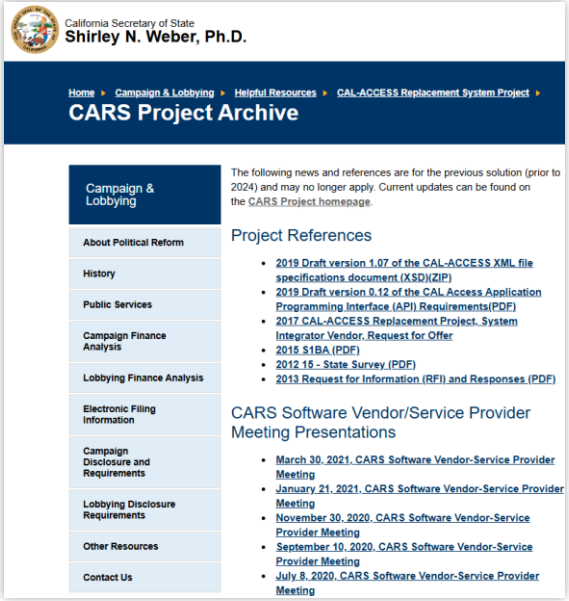


CARS WEBSITE REMINDERS

CARS Project Homepage



CARS Project Archive



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

Appendix

Q&A PARKING LOT

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July 8, 2026 – Questions

- Will electronic signatures be required on forms such as the 602 and 605?
- Is there a list of character limitations for different fields?
- Are there fields for comments/explanations of unusual situations in Activity Reporting screens (formerly Form 460)?
- For registration documents, will lobbyist statements be linked to the 601/605 and future amendments?
- Will simplified output PDFs replace fillable PDFs currently available on the FPPC site?
- Will tutorials for lobbying activity reporting be made available well before the go-live date?
- How does the Activity Expense data in the new CAL-ACCESS differ from Activity Expense data on the current Form 635?