CARS PROJECT UPDATE FOR THE FAIR POLITICAL PRACTICES COMMISSION (FPPC)

JANUARY 19, 2021
2:00 PM – 3:00 PM
AGENDA

- CARS Project Update
- Certification of CAL-ACCESS
- Responses to FPPC Pre-Meeting Questions
- Assumptions Regarding FPPC System Needs
- FPPC CAL-ACCESS Training
- FPPC Review of the new CAL-ACCESS
- Demonstrations
- Final Q&A and Wrap-Up
CARS PROJECT UPDATE
COMPLETED AND UPCOMING ACTIVITIES

- Completed a second round of testing in December 2020
- SOS User Acceptance Testing (UAT) starts in mid-February.
- Stakeholder engagement meetings continue and will expand to additional groups *(Good Government - February; the media - May).*
- Communications continue through website postings, updates to FAQs, periodic newsletters, and “Contact CARS” email.
Plans are being finalized for a revised phased implementation approach.

➢ **Release 1 – Implement February 28:** Majority of functionality; internal and select externals will have access

➢ **Release 2 – April 30:** Correspondence, Financial Transactions, API initial filings, E530 and more

➢ **Release 3 – June 30:** Public to have access, and system certification by the Secretary
PROJECT UPDATE

BENEFITS OF THE APPROACH

- Provides improved product delivery
- Enables SOS users to gain ability needed to assist external users
- Provides time for select external users (FPPC, FTB and SIG) to perform a system review and submit feedback
- Provides additional time for software vendors to test the API and become certified software vendors
- Minimizes changes during lobbying registration period
New and returning users must complete a registration process the first time logging in starting June 30, 2021.

➢ Treasurers / Responsible Officers for multiple entities only need to create one account.

➢ Filing entities can be linked to the one account, eliminating the need for individual filing entity passwords.

➢ Ownership of the entities can be transferred to another registered user by submitting a linkage request.

➢ Linkage gives permission for that user to access a filing entity’s data.
New CAL-ACCESS system certification is targeted for the date of external implementation (June 2021).

The new CAL-ACCESS becomes the “system of record” at the time of external implementation and certification.

The Certification Checklist created by SOS includes criteria for system certification.

We are running a parallel activity for certification of software vendors.
RESPONSES TO FPPC PRE-MEETING QUESTIONS

- Testing and System Review will utilize “mock” data (initially) and then real data.
- Data from the current system will be migrated prior to external implementation (June).
- FPPC users will have the same level of access as today.
- FPPC users will be able to view “correspondence sent.”
- FPPC users will be able to view PDATA payment information.
 Ability to view (not edit) all filings, including PDF versions

 Ability to view (not edit) transactions, responsible officers, and attestations

 Ability to view information redacted from public view
  ➢ View physical addresses
  ➢ View bank account numbers
FPPC will receive a four-hour virtual classroom training session for 15 FPPC users in the Education Division. (34 Enforcement Division users – TBD)

Training will be scheduled Q2 of 2021 (approximately May).

Instructional and reference materials provided during training will be available on the SOS website CAL-ACCESS page.

Need FPPC point of contact for training (SOS is Samantha Brown, Training & Outreach - sbrown@sos.ca.gov)
System review will occur between March and May.

FPPC, FTB, and Stakeholder Input Group (SIG) will participate.

FPPC may designate two people from their organization.

Please send names and email addresses of your two people to Hailey Coursey at hcoursey@sos.ca.gov by Friday, January 22.

Input from the review will be utilized by the CARS Testing Team for consideration in June and for future releases.
DEMONSTRATION OF THE PUBLIC PORTAL
Q & A / WRAP UP
WHERE TO FIND PROJECT INFORMATION

Visit the CAL-ACCESS project website https://www.sos.ca.gov/campaign-lobbying/cal-access-replacement-system-project-cars-updates/

➢ View documents, FAQs, and events
➢ Sign up to receive project updates

CARS Email Address: Submit questions and comments to the CARS project team: PRDCARS@sos.ca.gov