CAL-ACCESS REPLACEMENT SYSTEM (CARS) PROJECT UPDATE FOR GOOD GOVERNMENT GROUPS

JANUARY 20, 2021
10:30 AM – 12:00 PM
AGENDA

- Welcome
- Project Approach
- New CAL-ACCESS Implementation Timeline
- Initial Log-in to the New CAL-ACCESS
- Certification of the System
- Demonstration
- Q&A / Wrap Up
PROJECT APPROACH

- Leverage experiences and knowledge gained over three years
- Adhere to statutory requirements
- Provide two-way communication
  - Stakeholder meetings
  - CAL-ACCESS website (FAQs, meeting announcements, newsletters, and presentations)
  - Contact CARS mailbox (PRDCARS@sos.ca.gov) for questions/comments
  - Constant Contact automated email notices to those who register
Use a local system integrator (SI): OSaaS selected in competitive bid

Build the new CAL-ACCESS in an iterative fashion (Agile)

Base construction on requirements

Use Subject Matter Experts and engage external stakeholders
CAL-ACCESS will be implemented using a phased approach.

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

- **Release 2 – April 30:** Implement correspondence, financial transactions, API initial filings, E530 and more

- **Release 3 – June 30:** Public access and system certification by the Secretary
# NEW CAL-ACCESS IMPLEMENTATION TIMELINE

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<th>December 2020</th>
<th>January 2021</th>
<th>February 2021</th>
<th>March 2021</th>
<th>April 2021</th>
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- **CAL-ACCESS Development**
- **CAL-ACCESS Testing**
- **API (Interface) Development and Testing**
- **CAL-ACCESS System Review**
- **Training**
- **Release 1 – February 28**
  - Internal SOS Users
- **Release 2 – April 30**
  - Internal SOS Users
- **Release 3 – June 30**
  - Public Users

**Cutover**
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 (June 2021).

SOS created a Certification Checklist being used by the project.

There is a parallel activity for certification of software vendors.
DEMONSTRATION OF THE CAL-ACCESS PUBLIC PORTAL
Q & A / WRAP UP
Visit the CARS 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**