

CARS PROJECT NEWS

WHAT TYPE OF CAL-ACCESS USER ARE YOU?

The user universe expands in the new CAL-ACCESS

The new CAL-ACCESS will allow a user to create a **registered user** profile by choosing a unique user ID, password and security question(s), whether the user is a non-filer exploring campaign finance activities or a filing entity with complex reporting requirements. Conversely, a user who does not file campaign documents or save reports may explore the new CAL-ACCESS as an **anonymous user**.

At a minimum, registered users will be able to:

- Access public political reporting data
- Create queries
- Run and save reports

Filing entities must become registered users, and will be able to file statements of organization, activity reports and electronically submit attestations. Software vendors and service providers will also be registered users in the new CAL-ACCESS.

A registered user can also act as a **primary user**, a user authorized to create and manage other registered user accounts. For example, a treasurer who is a primary user for three campaign committees will be able to establish and act on behalf of each committee without logging into the application three separate times using three separate user IDs and passwords. An administrative assistant acting as a primary user will be able to submit form data for multiple filing entities, as well as link those entities to the responsible officers who will ultimately attest to the data.

This user profile structure will not only allow for electronic attestations and communications, but will enhance system security, user accountability and improve public access to campaign finance data. However, active users of the current CAL-ACCESS who do not have unique user IDs and passwords must establish them prior to go-live of the new CAL-ACCESS. Primary users will need to be identified and profiles of responsible officers will need to be linked to the appropriate filing entities.

Beginning in the first quarter of 2020, the CARS Project team will launch outreach activities to identify active users of the current CAL-ACCESS and provide them with the opportunity to select new user IDs, passwords and security questions, as well as validate their relationships with other registered users or filing entities. Watch for additional information on the CARS project website or sign up to [receive e-updates](#).

| User Type | Unique User ID | Password | View | Save reports/queries | Create filing entities and assign permissions |
|------------------|----------------|----------|------|----------------------|---|
| Anonymous | | | ✓ | | |
| Registered User* | ✓ | ✓ | ✓ | ✓ | |
| Primary User | ✓ | ✓ | ✓ | ✓ | ✓ |

*A Registered User becomes the Primary User for any account he/she creates until he/she assigns primary user permissions to another registered user.



Events in October

October 9, 2019 | CARS Stakeholders Input Group (SIG) Kick-Off Meeting

October 25, 2019 | Software Vendor / Service Provider Meeting

Upcoming Events

November 2019 | CARS SIG Meeting

December 2019 | Software Vendor / Service Provider Meeting

Visit the [CARS project website](#) to sign up for electronic updates or to check out the [Frequently Asked Questions \(FAQs\)](#).

Add these terms to your new CAL-ACCESS Glossary...

Anonymous User – Any visitor to the website who can search for and view publicly available information. The Anonymous User can search, view, print and download website data. However, a user account must be created in order to save a search query for future use.

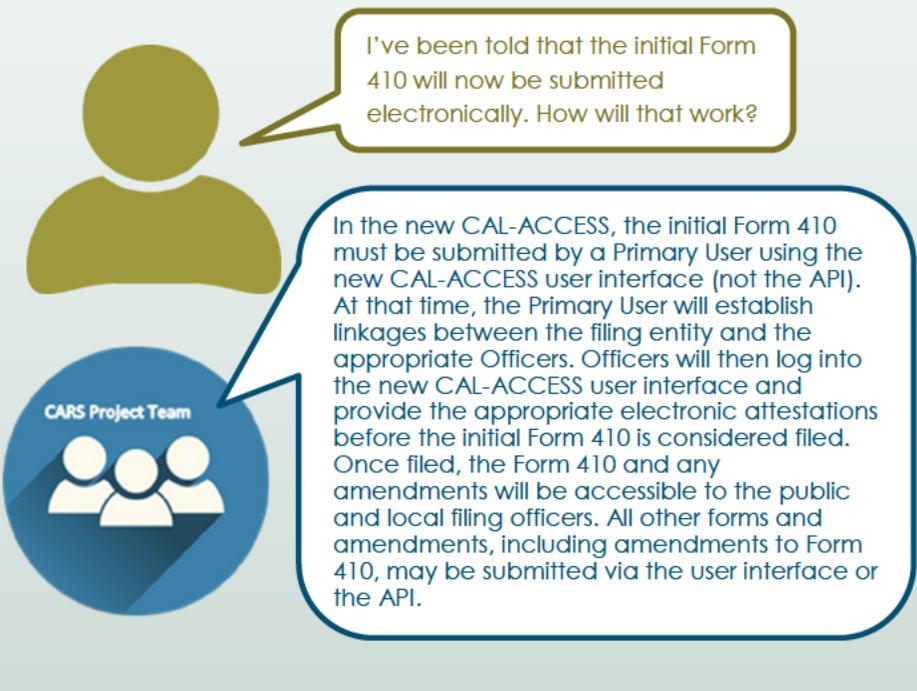
Authorized Agent – A Registered User with filing entity level access who can perform certain actions (based on the User Role they are assigned) on behalf of the Filing Entity.

Filer / Filing Entity – An individual or entity that is a CAL-ACCESS Registered User in order to file registration and disclosure reports.

Primary User – A Registered User who is authorized to create a filing entity account. This is the de facto "Entity Account Owner" and is granted the All Access User Role. He/She can add/link Authorized Agents to the filing entity account, assign User Roles and identify which users associated with the entity shall receive correspondence/notifications. This role may be transferred at the filing entity's discretion.

Registered User – A user who has created a CAL-ACCESS account with valid login credentials. The Registered User can see publicly available information and create and save queries/reports for future use.

CARS QUESTION OF THE MONTH



I've been told that the initial Form 410 will now be submitted electronically. How will that work?

In the new CAL-ACCESS, the initial Form 410 must be submitted by a Primary User using the new CAL-ACCESS user interface (not the API). At that time, the Primary User will establish linkages between the filing entity and the appropriate Officers. Officers will then log into the new CAL-ACCESS user interface and provide the appropriate electronic attestations before the initial Form 410 is considered filed. Once filed, the Form 410 and any amendments will be accessible to the public and local filing officers. All other forms and amendments, including amendments to Form 410, may be submitted via the user interface or the API.

Introducing CARS SIG Stakeholders Input Group

Political Attorneys and Political Treasurers are critical participants in the campaign finance and lobbying activity disclosure and reporting process. The CARS Project Team, working in collaboration with the California Political Attorneys Association (CPAA) and California Political Treasurers Association (CPTA), has established the CARS Stakeholders Input Group (SIG) to provide a means to obtain feedback and input on specific CAL-ACCESS functionality. The CPAA and CPTA have each provided a core team of three members and three alternates to participate in SIG, and the new SIG group will meet regularly, which began with a kickoff meeting in early October.

Anyone interested in SIG discussion topics may attend SIG meetings in listen-only mode via WebEx. Watch for meeting details in the [News and Updates](#) page of the [CARS project website](#), or sign up for [CARS project e-updates](#).

CAL-ACCESS Project Update Meetings

CAL-ACCESS Project Update Meetings are informative and interactive meetings hosted by the CARS project to provide an opportunity for stakeholders to learn more about the development and functionality of the new CAL-ACCESS.

The CARS Project Team met with the Software Vendors and Service Providers on September 27, 2019. In this webinar meeting, the CARS Project Team discussed the following topics:

- The most recent version of electronic file specifications was distributed to software vendors and service providers on September 23, 2019. XSD specifications apply to upload via keyboard or Application Programming Interface (API). Send feedback to PRDCARS@sos.ca.gov.
- The CARS Project Team has finalized and published version 1.07 of API requirements, which incorporates API infrastructure as well.
- The Fair Political Practices Commission (FPPC) has approved removal of Form 690 (Amendment to Lobbying Disclosure). Form 690 will be removed from future versions of the electronic file specifications. Electronic file specifications will be updated to reflect resulting modifications to Forms 615, 625, 635 and 645.
- The CARS Project Team and CARS System Integrator are in the process of evaluating the impact of AB909.
- Barring changes necessitated by AB909 and future legislation and the removal of Form 690, the CARS System Integrator does not anticipate any significant modification to electronic file specifications.

Visit the [CARS project website](#) for details about the future project update meetings.

About CARS

"CARS" stands for CAL-ACCESS Replacement System. The California Secretary of State has undertaken a project to replace the current CAL-ACCESS with a new, online, data-driven filing and disclosure system.

About the Newsletter

CARS Project News is a production of the CARS Project Team and the Secretary of State Political Reform Division.

For questions or comments regarding this project, please contact the Secretary of State via email at PRDCARS@sos.ca.gov, by phone at (916) 653-6224, or by writing to:

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CARS PROJECT TIMELINE – OCTOBER 2019

