

CARS PROJECT NEWS

CA Secretary of State

September 2019

CARS APPLICATION PROGRAMMING INTERFACE (API) | *Electronic File Uploads via the new CAL-ACCESS*

In the new CAL-ACCESS application, a filer may submit filings by manually entering filing data using the application's guided interview format. The application will save the data, create a pdf version of the filing for preview, and request an on-line attestation from the filer once the filing displays satisfactorily. Alternatively, the filer may use an Excel or XML file to electronically upload data for filings directly into the CAL-ACCESS user interface. The filer can preview the filing during the course of the upload, and will attest to the filing as it is submitted. This electronic upload can minimize duplicative entry of data that may have already been entered into another software application for accounting or tracking purposes.

However, human-driven data entry or file upload is not the only way to input data into the application. In the December 2018 project update meeting, the software vendor and service provider community requested that the Secretary of State provide an application programming interface (API) that allows for a more direct, machine-to-machine upload of filing data into the new CAL-ACCESS. The CARS Project Team agreed this functionality was important for the new application and has submitted a project change request that will add the development of an API to the project scope. The CARS Project Team has defined the system requirements for an API and is developing regulations and business processes to support a new vendor software certification process. In addition, the team began to define attestation requirements for software vendors and service providers who will use the API.

Draft requirements for the API are now available in the reference library of the CARS Project website. The CARS Project Team is encouraging the software vendor community to provide feedback prior to the start of development. New regulations and processes will be shared once they are finalized and adopted.

Check back for updates, or subscribe to e-updates about the CARS Project.



Events in September

September 27, 2019 | Software Vendor and Service Provider Project Meeting

Upcoming Events

October 2019 | Stakeholder Input Group (SIG) Meeting

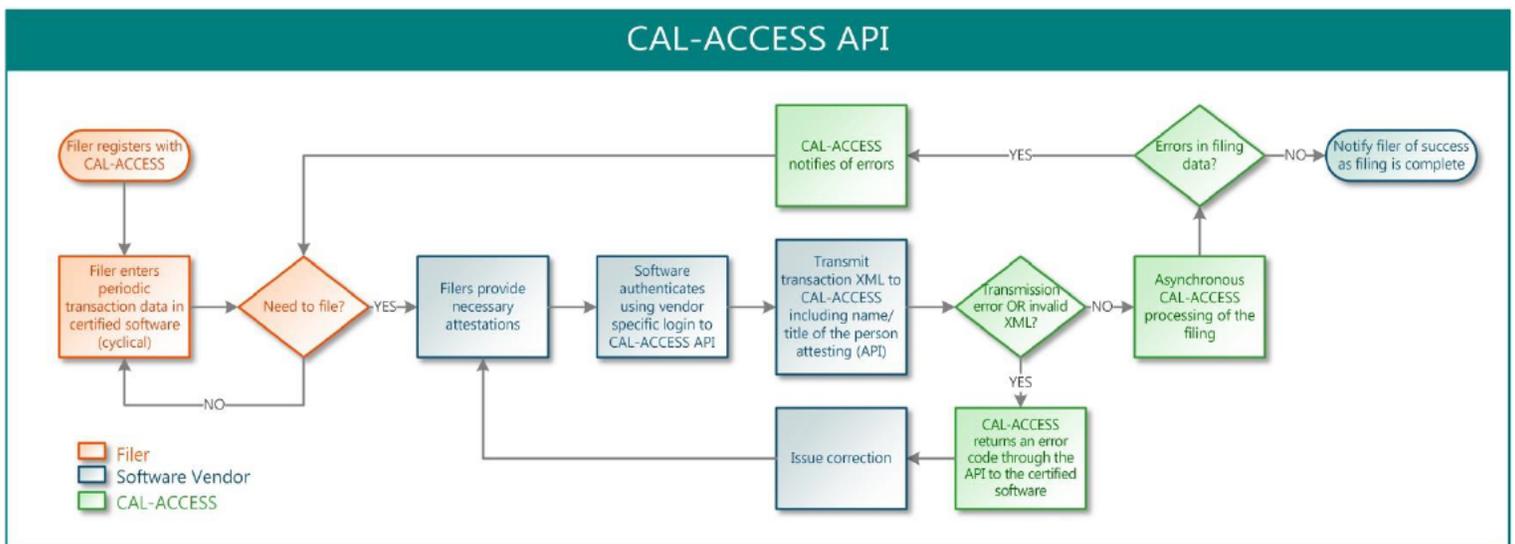
October 2019 | Software Vendor and Service Provider Meeting

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

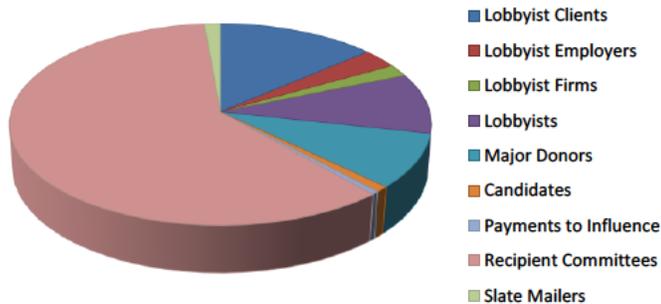


Application Programming Interface – a set of intermediaries that allow software applications to communicate with each other and exchange data.

How will it work?



THERE ARE 20,600+ CURRENTLY ACTIVE CAL-ACCESS FILING ENTITIES



...And almost all of them will need to transition to the new CAL-ACCESS prior to implementation.

The CARS Project Team has identified nine major filing entity groups (and the service providers that represent them) who will utilize the new CAL-ACCESS. Watch for details of how the CARS Project Team plans to bring each filing entity group into the new CAL-ACCESS application. Transition activities are scheduled to begin the second quarter of 2020. Sign up now for project [e-updates](#).

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:

Secretary of State, Political Reform Division
1500 11th Street, Rm 495
Sacramento, CA 95814

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 August 23, 2019. In this webinar meeting, the CARS Project Team discussed:

- Electronic file upload will be available for all 28 forms. Development is complete for 16 forms.
- SOS continues to work with the CAL-ACCESS system integrator to develop a new project schedule with an updated timeline, based on the February 2021 project extension established by SB 84.
- The new CAL-ACCESS Transaction ID field has been globally expanded to 100 characters to accommodate GUIDs.
- The FPPC will consider the SOS's recommendation to retire Form 690 when it meets in September 2019. If Form 690 is retired, there will be additional changes to other lobbying activity report forms.
- The legacy CAL-ACCESS cannot know if it is necessary for a record to have both a Tran_ID (transaction ID) and a BakRef_TID (the field that links a parent record to a child record). Data conversion of parent/child records that do not have both fields populated will result in orphaned records, complicating the amendment of these transactions in the new CAL-ACCESS. Beginning immediately, the CARS Project Team recommends ongoing electronic filings populate both the Tran_ID and BakRef_TID fields for all parent/child transactions.

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

CARS QUESTION OF THE MONTH



Do the CAL-ACCESS API requirements include the API functionality for extracting data for public access purposes or only the functionality for electronic filing using approved software from a third party vendor?

CARS Project Team



Yes, the CAL-ACCESS API requirements address data retrieval from CAL-ACCESS, as well as electronic filings through a third party vendor.