



CARS PROJECT

Introducing, the new and improved



CAL-ACCESS Replacement System (CARS) project restart

In January 2020, the California Secretary of State's CAL-ACCESS Replacement System (CARS) project pivoted to Salesforce as the new platform. The new platform was selected as the solution that would best meet project goals.

In February through July 2020, the project on-boarded a new project management team and system implementation consultants; validated requirements and project scope; created a new project schedule; and adopted a new Agile system development methodology.

In July and August 2020, the new project team kicked off the restart by holding meetings with Secretary of State (SOS) Political Reform Division (PRD) staff, the previously chartered Stakeholder Input Group, software vendors and service providers. The team also invited software vendors meeting specific criteria to participate in a small Software Vendor Subgroup for validating requirements for the Application Programming Interface (API).

Project Approach

The new project approach leverages experience and knowledge gained over the past three years and increases stakeholder engagement and participation.

Project Timeline

The target "Go-Live" date for the new system is February 28, 2021. Key activities include the following.

- ◆ **JULY 2020 - FEBRUARY 2021**
 - CAL-ACCESS Application Development and Testing
 - API Design and Development
 - Stakeholder Input Group (SIG) Meetings
 - Software Vendor and Service Provider Meetings
 - Software Vendor Subgroup Sessions
 - CAL-ACCESS Website Information Updates (including FAQs, announcements, calendar of events, and newsletters)
- ◆ **SEPTEMBER - OCTOBER 2020**
 - API Specifications Published
 - Software Vendor API Testing
- ◆ **NOVEMBER - DECEMBER 2020**
 - CAL-ACCESS End-to-End Testing
 - API End-to-End Testing
 - Software Vendor API Testing
- ◆ **JANUARY - FEBRUARY 2021**
 - CAL-ACCESS & API End-to-End Testing
 - SOS CAL-ACCESS & API User Acceptance Testing (UAT)
 - SOS User Training and Public User Instructions Published
 - Cutover (Weekend before Go-Live)
 - Go-Live (February 28)



Working during COVID-19

The CARS Project Team continues to work on the project during the COVID-19 pandemic.

Stakeholder meetings are being conducted via WebEx to ensure we stay connected with our stakeholders as well as ensure their safety and the health and safety of our staff.

CONTACT US

Do you have a comment or can't find the answer to your question on the CAL-ACCESS website?

Email your question or comment to us at PRDCARS@sos.ca.gov; or, call us at (916) 653.6224.

Designing the new Public Portal

After creating the system architecture and data model, the CARS Project Team started developing the Public Portal. This will be the starting point for you to access the new system.

The portal Log in or Registration page includes robust security to protect user information. When a person registers (creates an account), the system sends an email to the provided email address to validate it and prompts the user to create a username and password.

After logging into the system, the user will be directed to a personalized Landing Page. Here, the user will choose to view campaign



forms or lobbyist forms. If they are a returning user, they will also see a list of recently submitted or reviewed forms at the bottom of your screen and links.

The portal Landing Page will continue to evolve during future development sprints and will provide a modern look and intuitive navigation.

Transforming the filing process

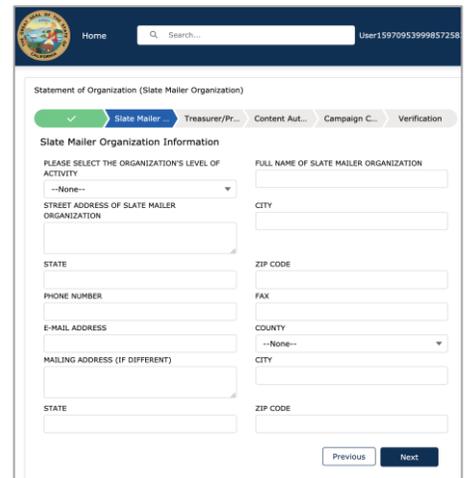


The CAL-ACCESS Replacement System (CARS) project is transforming campaign finance and lobbying activity filing process from the current paper / FTP / online hybrid model to a fully online data driven and content-oriented service model.

Filer Registration (FPPC Form 400)

In the new CAL-ACCESS, you will be required to complete the General Information screen where you indicate you are authorized to complete the form and submit and sign the penalty of perjury statement.

A progress bar at the top of your screen will inform you of where you are in the process and subsequent steps you need to complete.

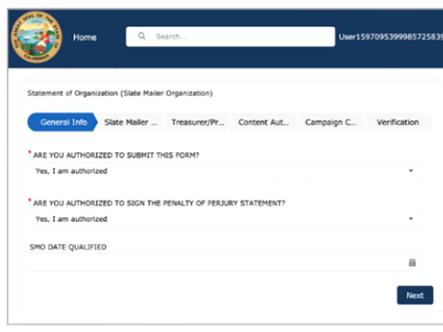


FUTURE: Data-driven System

Development Schedule

CAL-ACCESS development started with processes associated with inputting data for Campaign and Finance registration, disclosure, and capturing lobbyist data.

Additional functionality will be developed according to the approved schedule.



You will then be taken to a screen that corresponds to Section 1 of the paper Form 400.

KEEPING YOU INFORMED

CAL-ACCESS Website Update

The CARS Project Team has updated the CAL-ACCESS Project website. A calendar is available for easy access to meeting dates and flyers; presentations from recent stakeholder meetings are posted; and new FAQs continue to be updated on a regular basis. Pre July 2020 information has been moved to the [CARS Project Pre 2020 Archive](#) page.



Visit the newly updated CAL-ACCESS Project website at: <https://www.sos.ca.gov/campaign-lobbying/cal-access-replacement-system-project-cars-updates/>



SOS uses Constant Contact to keep subscribers informed about CARS project news. Sign up to receive email updates now!

FAST FACTS

43,545

Highest volume of users visiting the CAL-ACCESS system in one day (as of December 2019)

13,163

Average number of committees per election cycle

127,750

Total online, electronic, and paper filings in 2018 (filings in 2016 totaled 118,199)



Collaborating with our Stakeholders

Software Vendor Subgroup

The CARS Project Team invited software vendors who filed 900+ forms in the previous election year to participate in the Software Vendor Subgroup. The purpose of the subgroup is to allow CARS technical project team members to ask technical questions in a small group setting. Responses to these questions will help the project team design an API that will meet the needs of the software vendor community.

Stakeholder Input Group

The Stakeholder Input Group (SIG) is comprised of California Political Treasurers Association (CPTA) and California Political Attorneys Association (CPAA) representatives. The CARS project team met with this group to orient them to the new project team and timeline and continues to meet with them every six to eight weeks (or as needed) to discuss progress.

Other Stakeholders

The CARS Project Team meets with other stakeholders periodically to update them on project progress.

Software Vendor and Service Provider Meetings

Software Vendor and Service Provider meetings occur every six to eight weeks during the duration of the project. These meetings provide the opportunity to present project progress and demonstrate new functionality that has been developed and vetted by SOS Subject Matter Experts.

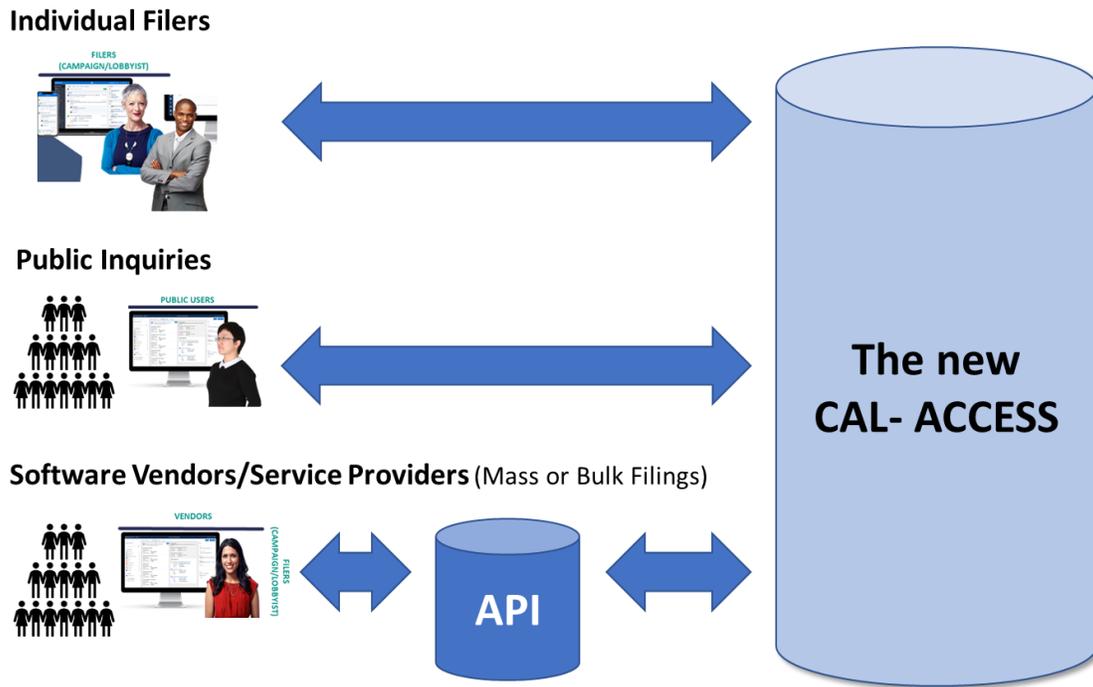
Application Programming Interface (API) Testing

Software Vendors have started testing the Mock API and are working closely with the CARS project team on testing results.

Specifications for the API are included in the API testing tool.



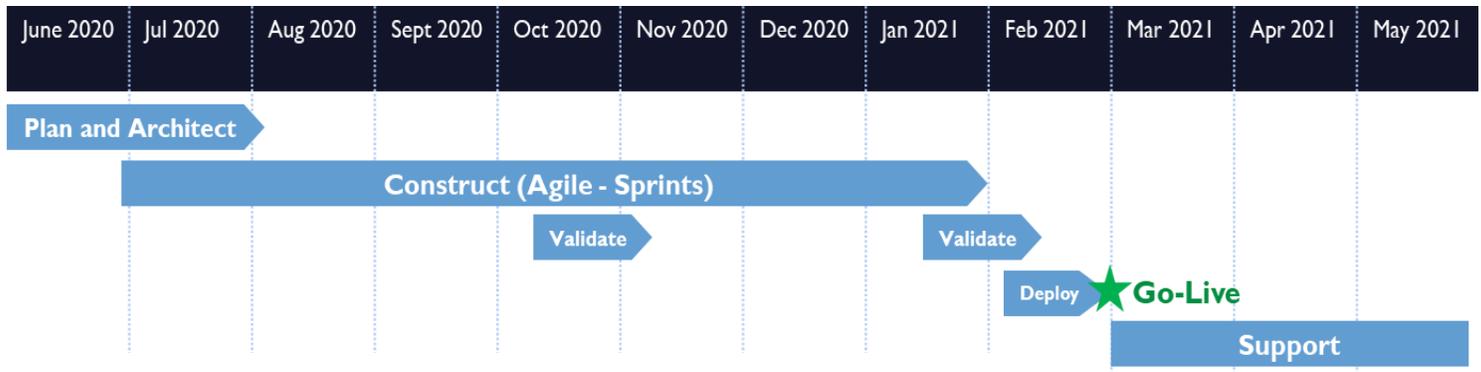
The New CAL-ACCESS Architecture



Key Benefits of the New CAL-ACCESS Architecture

The new CAL-ACCESS provides an integrated system that is fully documented and supportable, provides validation of data at input, automates existing manual workflow processes, provides flexible and accurate reporting of the data, and is adaptable for future business needs.

- ◆ **AUTOMATED FILING AND PAYMENTS**
The new CAL-ACCESS will transform the campaign finance and lobbying activity filing process from the current paper / FTP/ online hybrid model to a fully online service model. Features include a more intuitive interface, the ability to accept electronic signatures as allowed by statute, and a mechanism for paying fees/fines online.
- ◆ **AUTOMATED DATA VALIDATION / FILING VERIFICATION (with exception reporting)**
The new system will increase accuracy by automating validation and verification based on consistent business rules.



The New CAL-ACCESS Development Timeline

