



# AGENDA

- Welcome
- Progress Since Last Meeting
- Upcoming Work/Development
- Pre-2020 Request for Change (RFC) Update
- SIG Participation in Testing/Reviews
- Filer Registration Function Testing Demos
- Q&A
- CARS Project Newsletter & Wrap-Up



## PROGRESS SINCE LAST MEETING



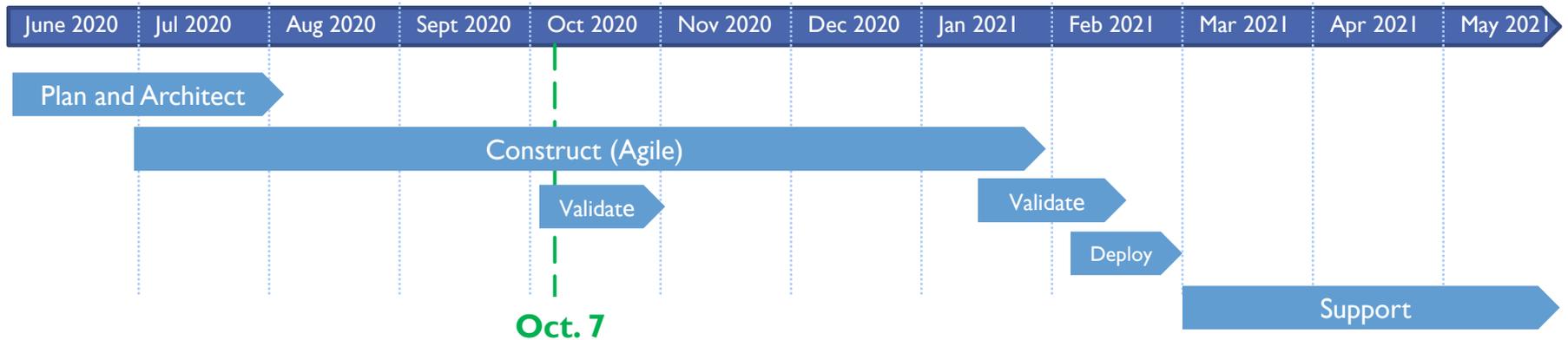
- Entered first round of internal testing for filer registration
- Invited vendors to perform testing of mock API/API
- Completing work on Form 410 and 600 series
  - Candidate Registration
  - Lobbying Registration
  - Slate Mailer Organization (SMO) Registration

## UPCOMING WORK



- Internal testing in October and December 2020
- SOS UAT in January and February 2021
- Sprints for correspondence, reports, and financial transactions span next eight weeks

# UPCOMING DEVELOPMENT



## Continuing Development

- Software Vendor API and Integration Testing
- Public Data Portal
- Refinements to Registration functionality (Campaigns, Committees, Lobbyist, Lobbying Firms, Slate Mailers, etc.)

## Upcoming Development

- Financial Transaction Business Rules
- User Accounts and Notifications
- Correspondence
- Disclosure Functionality (Committees, Candidates, Major Donors, Lobbying, etc.)

# PRE-2020 REQUESTS FOR CHANGE (RFC) UPDATE

## TOPIC: MEDIA BUYS



**How will the new system handle media buys? When a committee purchases media time through a buyer (parent vendor), deposits are typically made months in advance of the media run.**

The registered user can populate the "Media Air Date" field. If populated, then, when pulling in transactions for reporting purposes, the Media Air Date will override the Transaction Date. The Media Air Date will determine if the transaction is pulled into the report.

# PRE-2020 REQUESTS FOR CHANGE (RFC) UPDATE

## TOPIC: SPONSOR PAID ADMIN EXPENSES



**The current system allows entry of in-kind contributions. These contributions are subtotaled on Schedule C and carried over to the summary page of Form 460. The system does not provide a distinguishable way to report sponsor payments that are not technically contributions.**

In the new CAL-ACCESS, there is an option to choose “Sponsor Paid Admin Expenses” when reporting Non-Monetary transactions received. If this field is completed, the dollar value entered in the “Amount/Fair Market Value” field will not be added to the 460-summary page.

## SIG PARTICIPATION IN TESTING/REVIEWS



- SOS UAT planned for mid-January and February 2021
- CARS project team evaluating best approach for including SIG in new CAL-ACCESS reviews
  - Will leverage SIG's extensive experience
  - Provides valuable feedback



# FILER REGISTRATION FUNCTION TESTING DEMOS



- 601 – Lobbying Firm Registration (10 min)
- 605 – Lobbying Firm Amendment (6 min)
- 410 – General Purpose Committee Registration (10 min)
- 400 – Slate Mailer Organization Registration (12 min)



# Q & A

# CARS PROJECT NEWSLETTER

October CARS Project Newsletter will be posted to the CAL-ACCESS Project website **Friday**

- Additional issues scheduled for December and March
- November issue (if needed)



# 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, news, and events
- Sign up to receive project updates

**CARS Email Address:** Submit questions and comments to the CARS project team:  
**[PRDCARS@sos.ca.gov](mailto:PRDCARS@sos.ca.gov)**

**CAL-ACCESS  
Replacement System  
Project (CARS) Updates**

