CARS PROJECT STAKEHOLDER INPUT GROUP (SIG) MEETING

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

- CARS Project Update
- Certification of the new CAL-ACCESS
- SIG Review of the new CAL-ACCESS
- Demonstration
- Final Q&A and Wrap-Up
Completed a second round of testing in December 2020

SOS User Acceptance Testing (UAT) starts in mid-February.

Stakeholder engagement meetings continue and will expand to additional groups (Good Government - February; the media - May).

Communications continue through website postings, updates to FAQs, periodic newsletters, and “Contact CARS” email.
Plans are being finalized for a revised phased implementation approach.

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

➢ **Release 2 – April 30:** Correspondence, Financial Transactions, API initial filings, E530 and more

➢ **Release 3 – June 30:** Public to have access, and system certification by the Secretary
CARS PROJECT UPDATE
BENEFITS OF THE NEW APPROACH

- Provides improved product delivery
- Enables SOS users to gain ability needed to assist external users
- Provides time for select external users (FPPC, FTB and SIG) to perform a system review and submit feedback
- Provides additional time for software vendors to test the API and become certified software vendors
- Minimizes changes during lobbying registration period
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.

The Certification Checklist created by SOS includes criteria for system certification.

We are running a parallel activity for certification of software vendors.
SIG REVIEW OF THE NEW CAL-ACCESS

- System review will occur between March and May.
- FPPC, FTB, and Stakeholder Input Group (SIG) will participate.
- If you have not submitted information for your two reviewers…
  
  Please submit the names and email addresses to Hailey Coursey at hcoursey@sos.ca.gov by Friday, January 22.

- Input from the review will be utilized by the CARS Testing Team for consideration in June and for future releases.
DEMONSTRATION OF THE PUBLIC PORTAL
WHERE TO FIND PROJECT INFORMATION

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