CARS PROJECT STAKEHOLDER INPUT GROUP (SIG) MEETING

DECEMBER 2, 2020
10:30 AM – 12:00 PM
AGENDA

- Welcome
- New CAL-ACCESS Progress Overview
- Phased Go-Live Approach
- New CAL-ACCESS Instructional / Informational Materials
- Q&A and Wrap-Up
Completed initial development of the following

- Public Data Portal
- Candidate Registration
- Campaign Registration
- Lobbying Registration

Completed first round of SOS testing in October

Engaged stakeholders through meetings, updated the project website, and produced an October CARS Newsletter
NEW CAL-ACCESS PROGRESS OVERVIEW
CONTINUING ACTIVITIES

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

- Continuing meetings with Software Vendors and integration testing of the new interface
PROGRESS OVERVIEW
UPCOMING ACTIVITIES

- Meetings with “good government” organizations, the media, and other stakeholders
- December 2020: SOS testing new development
- Mid-January/Mid-February 2021: SOS User Acceptance Testing of the new CAL-ACCESS
SIG Chairs designate three people from their organization

- Three CPTA and three CPAA = Six total participants
- Participants can be “core” or “alternate” SIG members
- Chairs should email their names to PRDCARS@sos.ca.gov no later than Friday, December 18

Input from the review will be utilized by the CARS Testing Team for consideration in a future release (beyond the initial February 28 Go-Live)
PHASED GO-LIVE APPROACH

- February 28, 2021: Initial Go-Live of the new CAL-ACCESS
  - Migration of historical data prior to initial Go-Live of the new system
  - Certification of the system at initial Go-Live (target)

- Planned “releases” of additional functionality during the SI’s Maintenance and Operations (M&O) Phase
  - Additional Go-Lives (releases to production) on preplanned schedule
  - Primarily back-office functionality
PHASED GO-LIVE APPROACH
ROAD TO THE NEW CAL-ACCESS GO-LIVE

1: JUNE 2020
Requirements analysis and development planning

2: JULY AND ON-GOING
System Design/Development

3: OCTOBER
SOS Testing

4: DECEMBER
SOS Testing

5: MID-JAN THRU MID-FEB 2021
SOS User Acceptance Testing

6: FEBRUARY
SOS User Training

7: FEBRUARY
“Cutover” (1 WEEK)

8: FEBRUARY 28 GO-LIVE
Future “Release” Go-Lives During SI M&O Phase
## PHASED GO-LIVE APPROACH

### GO-LIVE TIMELINE

<table>
<thead>
<tr>
<th>December 2020</th>
<th>January 2021</th>
<th>February 2021</th>
<th>March/April 2021 (and ongoing)</th>
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<tbody>
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<td>14 7 11 14 18 21 25 28 31</td>
<td>4 8 11 15 18 22 25 29</td>
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- **New CAL-ACCESS Design, Development, QA, and Implementation**
- **System (QA) Testing**
- **SOS UAT**
- **SOS Training**
- **FPPC and FTB Training (4 hrs.) – Date TBD**
- **System “Cutover”** (current system not available)
- **Initial Go-Live 2/28/2021**

### SI M&O and Future Releases

- Enhancements to functionality
- Remediation of defects
- SOS User Acceptance Testing of release functionality
- Releases to production (Go-Lives) on a preplanned schedule
By February 28, 2021: New CAL-ACCESS instructional/informational materials will be posted to the SOS website

Updates to CAL-ACCESS instructional and reference materials will be made for future releases of functionality (if needed)

Approximately February 28, 2021: The final API specifications will be posted to the SOS website. (Specifications are being shared with software vendors involved in interface integration testing.)
Q&A / WRAP-UP

Q & A
Wrap-Up
Visit the CAL-ACCESS 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