



Alex Padilla
California Secretary of State



CAL-ACCESS REPLACEMENT SYSTEM (CARS) PROJECT



CARS PROJECT UPDATE FOR VENDORS AND SERVICE
PROVIDERS APPROVED FOR ELECTRONIC FILING IN
CALIFORNIA

DECEMBER 14, 2018



WELCOME



CARS Project Managers
Anand Deshmukh
Ralph Petty



AGENDA



- Project Overview
 - Introductions
 - Project schedule
- Anticipated Changes - File Format and Upload
- Future Meetings
- Project Contacts

INTRODUCTIONS



- Julie Waddell
Chief, SOS Political Reform Division
- Lorna Semana
Analyst, SOS Political Reform Division
- Christine McKenzie
CARS Project Director, SOS Project Management Office
- Krishna Dhulipala
CARS Solution Architect, SOS Information Technology Division
- Anand Deshmukh
SOS CARS Project Manager
- Ralph Petty
SOS CARS Project Manager
- Michel Pulleiro
Project Manager, Perspecta
- Rick Petrecca
Business Analyst Lead, PCC Technologies
- Vaidy Sreenivasan
Development Manager, PCC Technologies

PROJECT SCHEDULE: OVERVIEW



Area	Current Schedule
Requirements and Design	July 2018 – April 2019
New CAL-ACCESS Solution Development	October 2018 – August 2019
SOS End-to-End Testing	November 2018 – July 2019
SOS User Acceptance Testing	February 2019 – October 2019
SOS New System and Business Process Training	June 2019 – November 2019
New CAL-ACCESS Public Access Go Live	December 2019

KEY DATES FOR VENDORS



Event	Current Schedule
Release of the initial file upload format and specifications	Late December 2018
File upload testing	May 2019 - September 2019
Cutover and final legacy data migration	December 2019
SOS new CAL-ACCESS Certification	December 2019
New CAL-ACCESS Go Live	December 2019

ANTICIPATED CHANGES FILE FORMAT AND UPLOAD



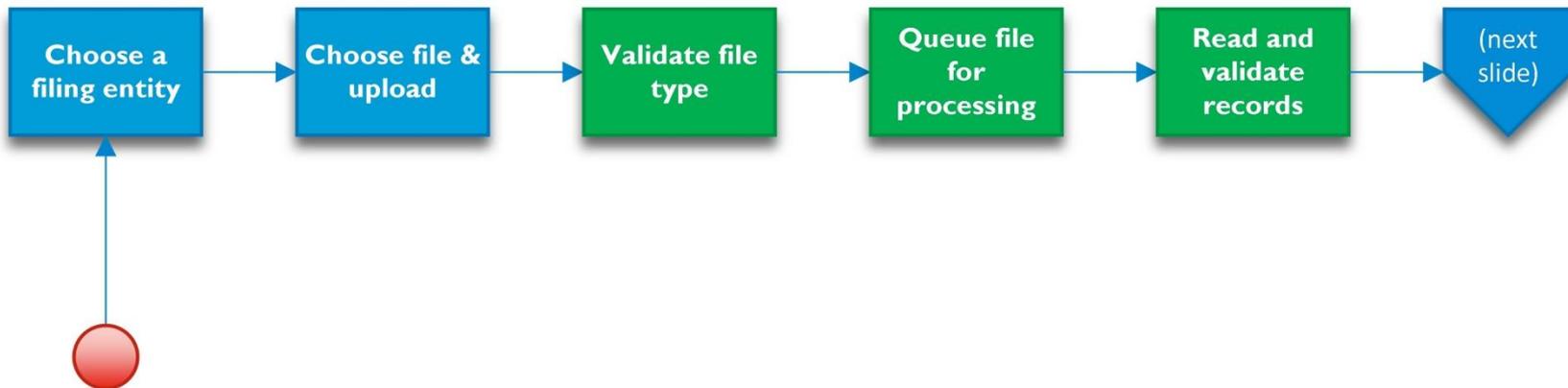
- Changing from a forms driven system to a data driven system. This results in changes to the content of data uploads.
- Upload integrated into CAL-ACCESS.
- Microsoft[®] Excel and XML formats supported.
- Process change to separate uploading and filing. Allows filer to validate success of upload before filing.
- Validation of file format and contents is part of upload process.
- Upload/File process.

ANTICIPATED CHANGES FILE FORMAT AND UPLOAD

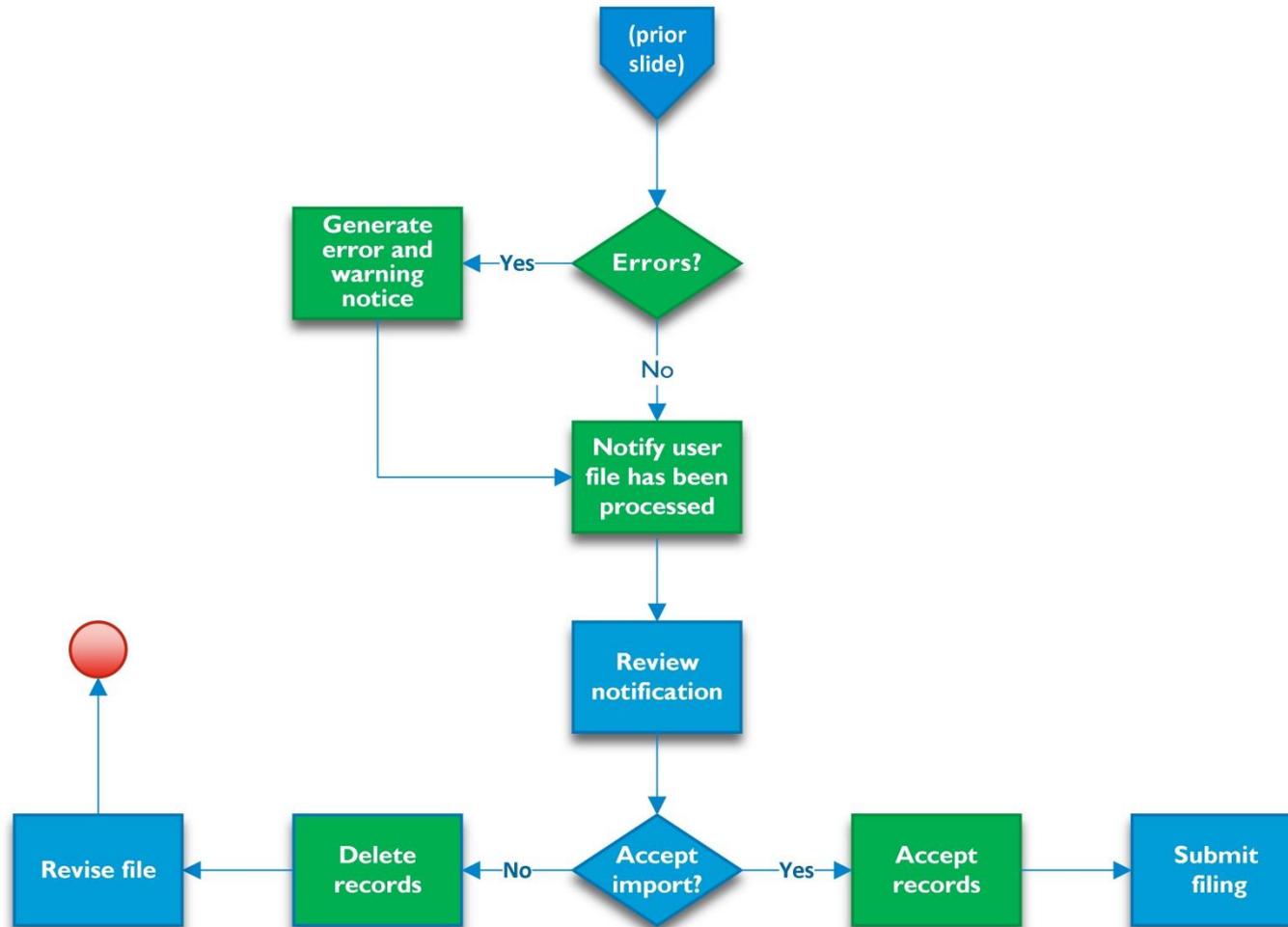


Electronic File Upload Process

VENDOR ACTION 
CAL-ACCESS 



ANTICIPATED CHANGES FILE FORMAT AND UPLOAD



ANTICIPATED CHANGES FILE UPLOAD



- Upload/File process
 - Choose a filing entity.
 - Choose a file and upload.
 - System validates file type (XML or Microsoft® Excel).
 - System queues file for processing.
 - Records read in and validated.
 - Formats validated.
 - Contents validated.
 - Errors & warnings generated.
 - Notification sent that file has been processed.
 - Filer reviews record count and warning, error and success messages.
 - Filer accepts or rejects import.
 - Records committed upon filer acceptance.
 - Accepted imports can be reverted prior to filing.
 - Submit filing.

FUTURE MEETINGS



- Monthly WebEx
 - Discuss CARS project updates
 - Discuss new CAL-ACCESS file upload processes
 - Ask questions
- Next meeting (tentative): January 25, 2019
 - Submit questions to prdcars@sos.ca.gov by January 18, 2019



PROJECT CONTACTS



- Email: prdcars@sos.ca.gov
- Website: <https://www.sos.ca.gov/campaign-lobbying/cal-access-replacement-system-project-cars-updates/>
 - View News and Updates
 - FAQs
 - Sign up to receive project updates via email



THANK YOU



Contact: prdcars@sos.ca.gov