



**Alex Padilla**  
**California Secretary of State**



# **NEW CAL-ACCESS INFORMATION SESSION**

**JANUARY 13, 2021**

**12:00 PM – 1:00 PM**

# AGENDA



- Welcome
- Address from Alex Padilla, Secretary of State
- Introduction: Dr. Shirley Weber, Secretary Designee
- CARS Project Update
- External User System Review
- Certification of the New CAL-ACCESS
- New CAL-ACCESS Training
- Final Q&A and Wrap-Up



# Alex Padilla

## California Secretary of State

Introduction of Dr. Shirley Weber, Secretary Designee

## CARS PROJECT UPDATE COMPLETED AND UPCOMING ACTIVITIES



- Completed a second round of testing in December 2020
- SOS User Acceptance Testing (UAT) starts next month (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.

# CARS PROJECT UPDATE

## REVISED PHASED IMPLEMENTATION APPROACH



Plans are being finalized for a revised CAL-ACCESS 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 PHASED APPROACH



- Provides improved product delivery
- Enables SOS users to gain ability and assist external users at the time of external implementation
- 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
- Minimize changes to team in lobbying registration period

## CARS PROJECT UPDATE IMPORTANT DETAILS



- Testing will continue to utilize mock data.
- Data from the current system will be migrated to the New CAL-ACCESS prior to external implementation (June).
- The Lobbying Directory will be produced using the current system.
- FPPC and FTB users will have the same access as today.

## EXTERNAL USER SYSTEM REVIEW



- System review of the New CAL-ACCESS will take place March through May 2021.
- Participants include FPPC, FTB, and members of the Stakeholder Input Group (SIG).
- Input will be used for the initial external implementation in June and for future releases.



## CERTIFICATION OF THE NEW CAL-ACCESS



- 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.
- The Certification Checklist created by PRD team includes criteria for certification.
- We are running a parallel activity for certification of software vendors.

## NEW CAL-ACCESS TRAINING



- Plans are being finalized for SOS user training.
- SOS user training materials will be saved to a special SharePoint site for easy access (*manuals, process diagrams, and quick reference guides*).
- Select external users (*FTB and FPPC*) will receive a four-hour virtual classroom training session in May.
- External user instructional materials will be provided during training and will be available on the CAL-ACCESS website.



# Q & A

# 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, 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](mailto:PRDCARS@sos.ca.gov)**

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

