CARS PROJECT

Introducing, the new and improved

cal access

CAL-ACCESS Replacement System (CARS) project phased implementation

The California Secretary of State's CAL-ACCESS Replacement System (CARS) project proposed and received approval of a phased implementation.

The phased implementation approach includes three releases. The first release includes automated functionality (80 to 85% of requirements). The second release primarily includes non-automated functionality. The final release is the Go-Live for system certification and public use of the new CAL-ACCESS.

Phased Approach Benefits

- ◈ Provides improved product delivery (implement fixes)
- ◈ Enables SOS users to gain ability needed to assist external users
- ◈ Provides time for select external users to perform a system review and submit feedback
- ◈ Provides additional time for software vendors to test the API and become certified software vendors
- ◈ Enables SOS to produce the 2021 Lobbying Directory using one (legacy) system
- ◈ Enables SOS to validate that the new system is built on a solid and dependable platform consistent with uptime expectations

Release Schedule

The phased implementation approach started with standing up the production environment in February. Now that the production environment is up, the remaining releases add functionality into the production environment in order to have the system be prepared for certification in June.

Functionality associated with each of the three implementations is included below.

- ◈ RELEASE 1 - February 28, 2021 ✓
  - ▪ Automated Functionality
    - • Filer Disclosures
    - • Filer Registration
    - • Correspondence
    - • Financial Transactions
  - ▪ Data Retrieval / Queries
  - ▪ System Administration (account maintenance, user notifications, etc.)

- ◈ RELEASE 2 – April 30, 2021 ✓
  - ▪ API Specifications Published
  - ▪ Software Vendor API Testing
  - ▪ e530 form data elements
  - ▪ October 2020 form changes incorporated

- ◈ RELEASE 3 – June 30, 2021
  - ▪ CAL-ACCESS & API End-to-End Testing
  - ▪ SOS CAL-ACCESS & API User Acceptance Testing (UAT)
  - ▪ SOS User Training and Public User Instructions Published
  - ▪ Cutover (Weekend before Go-Live)
  - ▪ Go-Live (June 30, 2021)

System Review

Representatives from select external stakeholder groups were invited to participate in a CAL-ACCESS "system review" and began in April 2021 to be completed in mid-May 2021.

Reviewer feedback will be used for planning future CAL-ACCESS releases.

CONTACT US

Do you have a comment or can't find the answer to your question on the CARS Project website?

Email your question or comment to us at **PRDCARS@sos.ca.gov;** or call us at (916) 653.6224.

Signing into the new CAL-ACCESS starting June 30, 2021

After creating the system architecture and data model, the CARS Project Team started developing the Public Portal.

The portal Log in (or registration) page includes robust security to protect user information. When a person registers (creates an account), the system sends an email to the provided email address to validate it and prompts the user to create a username and password.
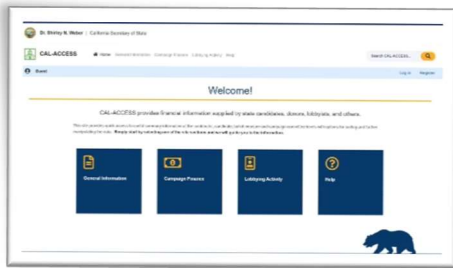
After logging into the system, the user will be directed to a personalized Landing Page. Here, the user will choose to view campaign forms or lobbyist forms. Returning users will see a list of recently submitted or reviewed forms at the bottom of your screen and links.

The portal Landing Page will continue to evolve and provide a modern look and intuitive navigation.
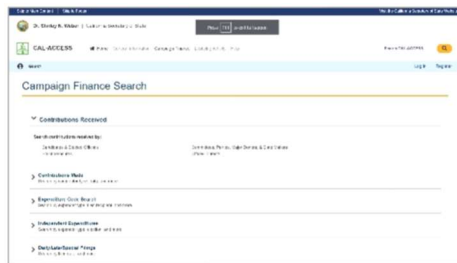
Performing Contributions and Lobbying searches

Welcome Screen

The new CAL-ACCESS makes searching easy. From the Welcome screen, users can select General Information, Campaign Finance, or Lobbying Activity.

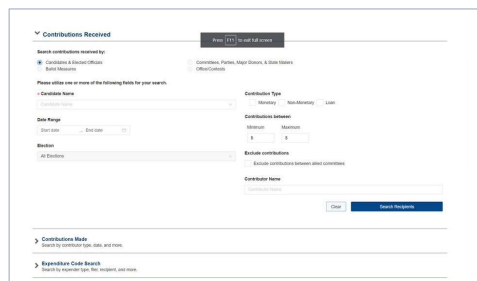"Help" can also be selected for detailed instructions on how to use the new CAL-ACCESS.

Campaign Finance Search

Searching for campaign contributions is easy. Users can select contributions received and made as well as search based on expenditure codes.
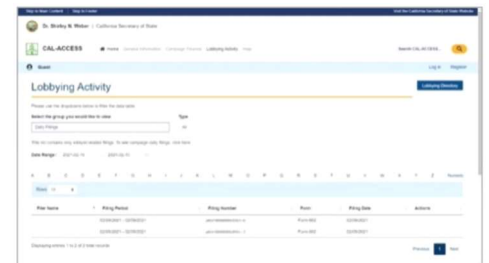

Contributions Received

A Contributions Received search is intuitive and easy to perform. Users use radio buttons and drop-down lists as well as enter search parameters (e.g. dates and contribution ranges).

Lobbying Activity

Drop-down lists and date ranges enable quick retrieval of lobbying activity data.

Visit the CAL-ACCESS Project website at: https://www.sos.ca.gov/campaign-lobbying/cal-

CAL-ACCESS Website

The CARS Project Team continually updates the CAL-ACCESS Project website.

A calendar is available for easy access to meeting dates; and meeting invitations and presentations are regularly added. Frequently Asked Questions (FAQs) are also updated on a regular basis.

Pre July 2020 information remains available on the CARS Project Pre 2020 Archive page.

The CARS Project Team uses Constant Contact to keep subscribers informed about CARS project news. Sign up to receive email updates now!

2.8 Tons

Paper to be saved each year due to new CAL-ACCESS automation

68

Trees to be saved each year due to new CAL-ACCESS paper savings from automation

Continuing Collaboration with Stakeholders

The CARS Project Team continues to meet with stakeholder groups on a regular basis to provide project updates and demonstrations of the progress achieved on the CAL-ACCESS Replacement System. Below are new groups added to the schedule.

Good Government Groups

The CARS Project Team invited members of various "good government groups" to attend a CARS Project Update meeting. During this meeting, participants received a status on project progress, discussed the new phased implementation approach and viewed a system demonstration of how to perform searches of lobbying and campaign information.

The Legislature

In December 2020 and again in February 2021, a special meeting was held for some members of the legislature and their staff. This presentations highlighted progress made to date and provided an opportunity for participants to take a sneak peek at the new CAL-ACCESS.

IGA

The CARS Project Team scheduled a March meeting with members of the Institute of Governmental Advocates (IGA). This meeting focused on demonstrations of the initial user sign-in starting June 30, and lobbying functionality in the new CAL-ACCESS.
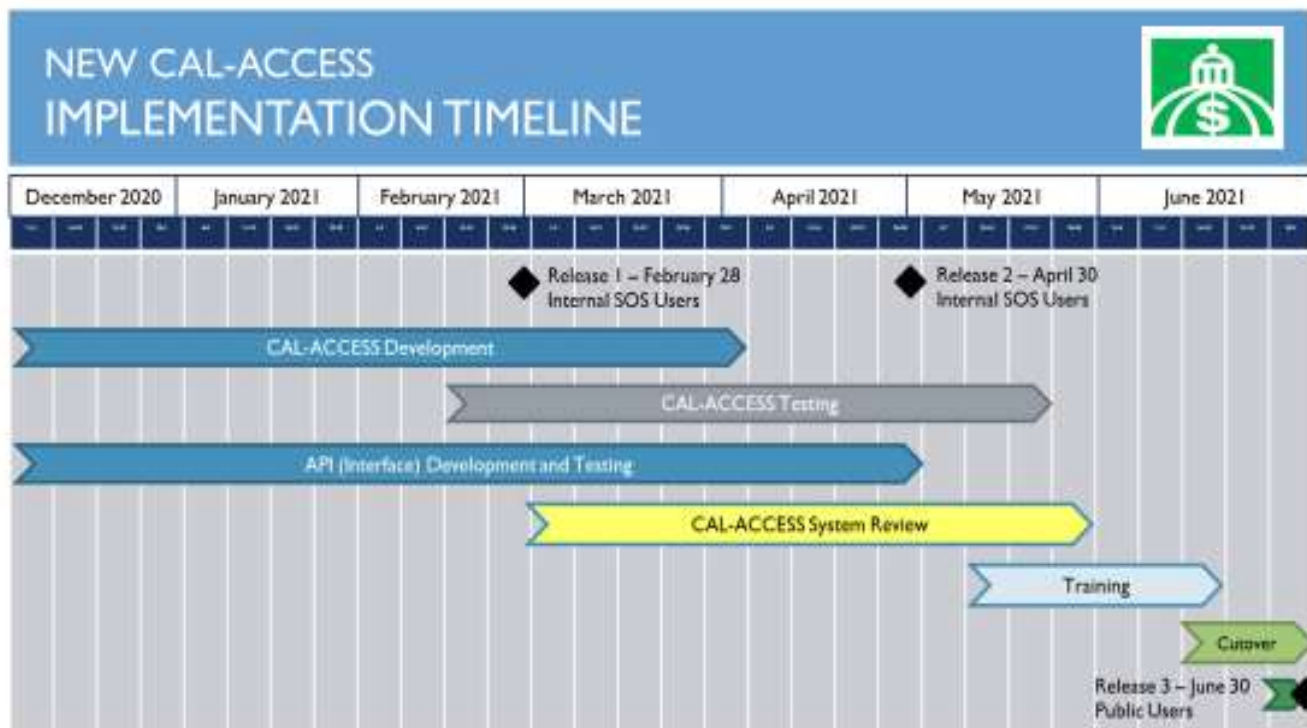

The Media

Members of the California Secretary of State's Communications Office and CARS Project team members will schedule one or more meetings with the media to discuss and provide demonstrations of how to perform searches in the new system. This instruction is anticipated to take place in May when the system is close to release to public users.

Please visit the CAL-ACCESS Replacement System project website's **News and Updates** page for meeting notices and copies of presentations.

CARS Project Email: PRDCARS@sos.ca.gov

CARS PROJECT IMPLEMENTATION

"Cutover" Activities

A period called "Cutover" will precede the third release of the new CAL-ACCESS to public users (in mid- to late June). The following activities will take place during this important phase.

- ◊ MIGRATING DATA
- ◊ DECOMMISSIONING THE LEGACY CAL-ACCESS
- ◊ MIGRATING THE SOFTWARE TO THE PRODUCTION ENVIRONMENT
- ◊ TRIGGERING USER SUPPORT PROCESSES AND POSTING PUBLIC USER DOCUMENTATION

The new CAL-ACCESS will transform the campaign finance and lobbying activity filing process from the current paper / FTP/ online hybrid model to a fully online service model. Features include a more intuitive interface, the ability to accept electronic signatures as allowed by statute, and a mechanism for paying fees/fines online.

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