



**DR. SHIRLEY N. WEBER**  
CALIFORNIA SECRETARY OF STATE



# **CAL-ACCESS REPLACEMENT SYSTEM (CARS) PROJECT UPDATE FOR GOOD GOVERNMENT GROUPS**

**JANUARY 20, 2021**

**10:30 AM – 12:00 PM**

# AGENDA

- Welcome
- Project Approach
- New CAL-ACCESS Implementation Timeline
- Initial Log-in to the New CAL-ACCESS
- Certification of the System
- Demonstration
- Q&A / Wrap Up



# PROJECT APPROACH



- Leverage experiences and knowledge gained over three years
- Adhere to statutory requirements
- Provide two-way communication
  - Stakeholder meetings
  - CAL-ACCESS website (FAQs, meeting announcements, newsletters, and presentations)
  - Contact CARS mailbox ([PRDCARS@sos.ca.gov](mailto:PRDCARS@sos.ca.gov)) for questions/comments
  - Constant Contact automated email notices to those who register

## PROJECT APPROACH (CONT'D)



- Use a local system integrator (SI): OSaaS selected in competitive bid
- Build the new CAL-ACCESS in an iterative fashion (Agile)
- Base construction on requirements
- Use Subject Matter Experts and engage external stakeholders

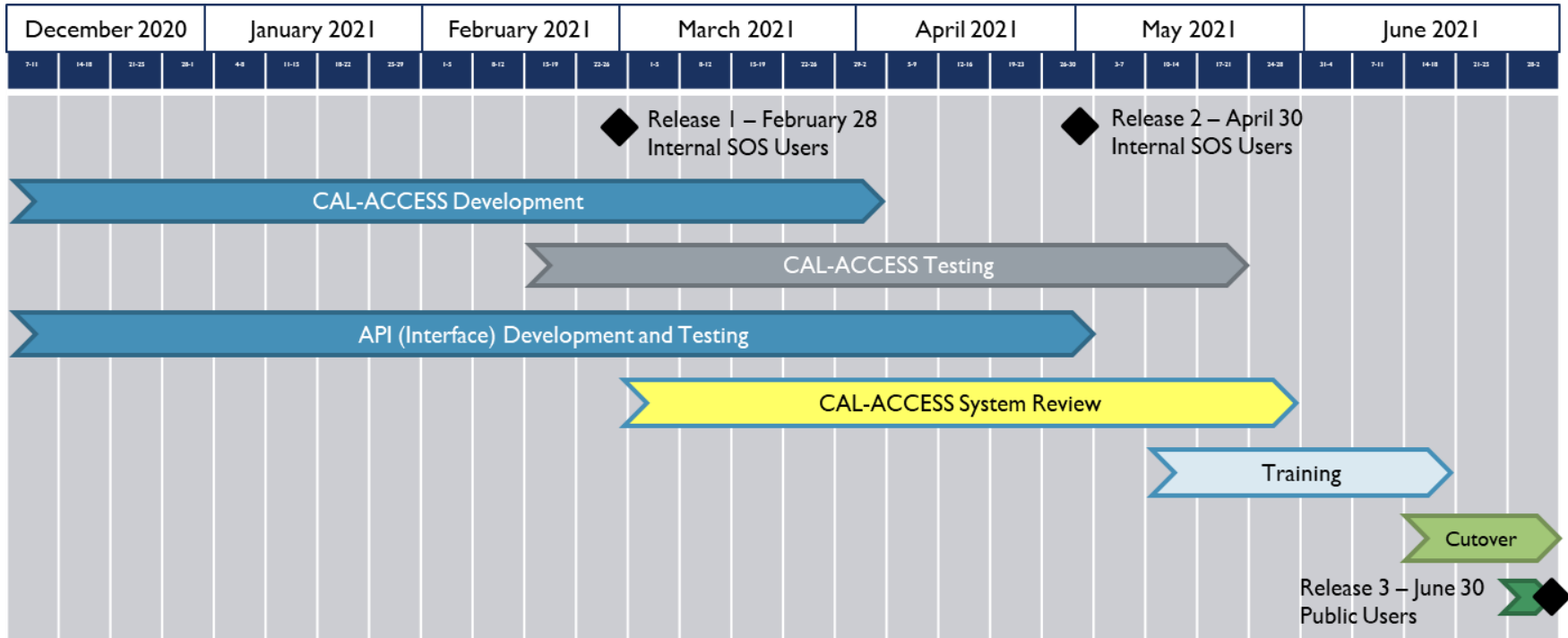
# PROJECT APPROACH PHASED IMPLEMENTATION



CAL-ACCESS will be implemented using a phased approach.

- **Release 1 – February 28:** Implement majority of functionality; internal and select externals will have access
- **Release 2 – April 30:** Implement correspondence, financial transactions, API initial filings, E530 and more
- **Release 3 – June 30:** Public access and system certification by the Secretary

# NEW CAL-ACCESS IMPLEMENTATION TIMELINE



# INITIAL LOG-IN TO THE NEW CAL-ACCESS



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.

## CERTIFICATION OF THE SYSTEM

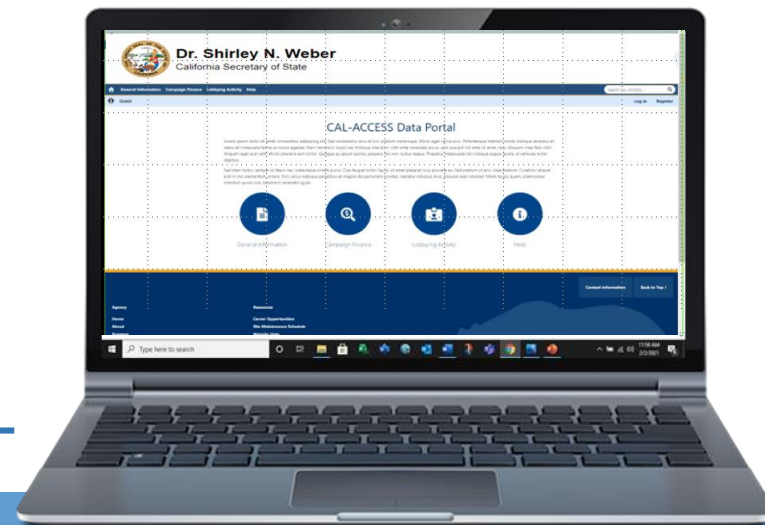


- New CAL-ACCESS system certification is targeted for the date of external implementation (June 2021).
- The new CAL-ACCESS becomes the “system of record” at the time of external implementation and certification (June 2021).
- SOS created a Certification Checklist being used by the project.
- There is a parallel activity for certification of software vendors.





# DEMONSTRATION OF THE CAL-ACCESS PUBLIC PORTAL





# Q & A

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

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

