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CALIFORNIA SECRETARY OF STATE



# **CAL-ACCESS REPLACEMENT SYSTEM (CARS) PROJECT UPDATE FOR INSTITUTE OF GOVERNMENTAL ADVOCATES**

**MARCH 10, 2021**

**10:30 AM – 12:00 PM**

# AGENDA

- Welcome
- Project Approach
- Phased Implementation
- Benefits of a Phased Implementation
- New CAL-ACCESS Implementation Timeline
- Initial Log-in to the new CAL-ACCESS
- Certification of the System
- Demonstrations – Lobbying & User Sign-In
- 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

# PHASED IMPLEMENTATION



The CARS Project is utilizing a phased implementation approach.

- **Release 1 – February 28:** Implement the majority of functionality; select internal Secretary of State users and select external stakeholders will have access for stabilization and validation
- **Release 2 – April 30:** Implement correspondence, financial transactions, API initial filings, E530 and more
- **Release 3 – June 30:** Public access, system certification by the Secretary, and retirement of the legacy CAL-ACCESS

# PHASED IMPLEMENTATION – THREE RELEASES



## RELEASE 1

- Automated Functionality
  - ✓ Filer Disclosures
  - ✓ Filer Registration
  - ✓ Correspondence
  - ✓ Financial Transactions
  - ✓ System Reports
- Data Retrieval / Queries
- System Administration (account maintenance., user notifications, etc.)

## RELEASE 2

- Software Fixes
- Non-Automated Functionality
  - ✓ SOS User Notes and Add'l. Correspondence
  - ✓ Additional Financial Transactions
- Migrated Data and Additional Data Retrieval
- Additional System Admin. / System Notifications

**April 30, 2021**

## RELEASE 3

- Software Fixes
- Final Data Migration
- Public Data Portal / Search
- API (Software Vendor Interface)
- SOS User Training
- Public User Instructional Materials
- System Certification
- Retirement of the legacy CAL-ACCESS

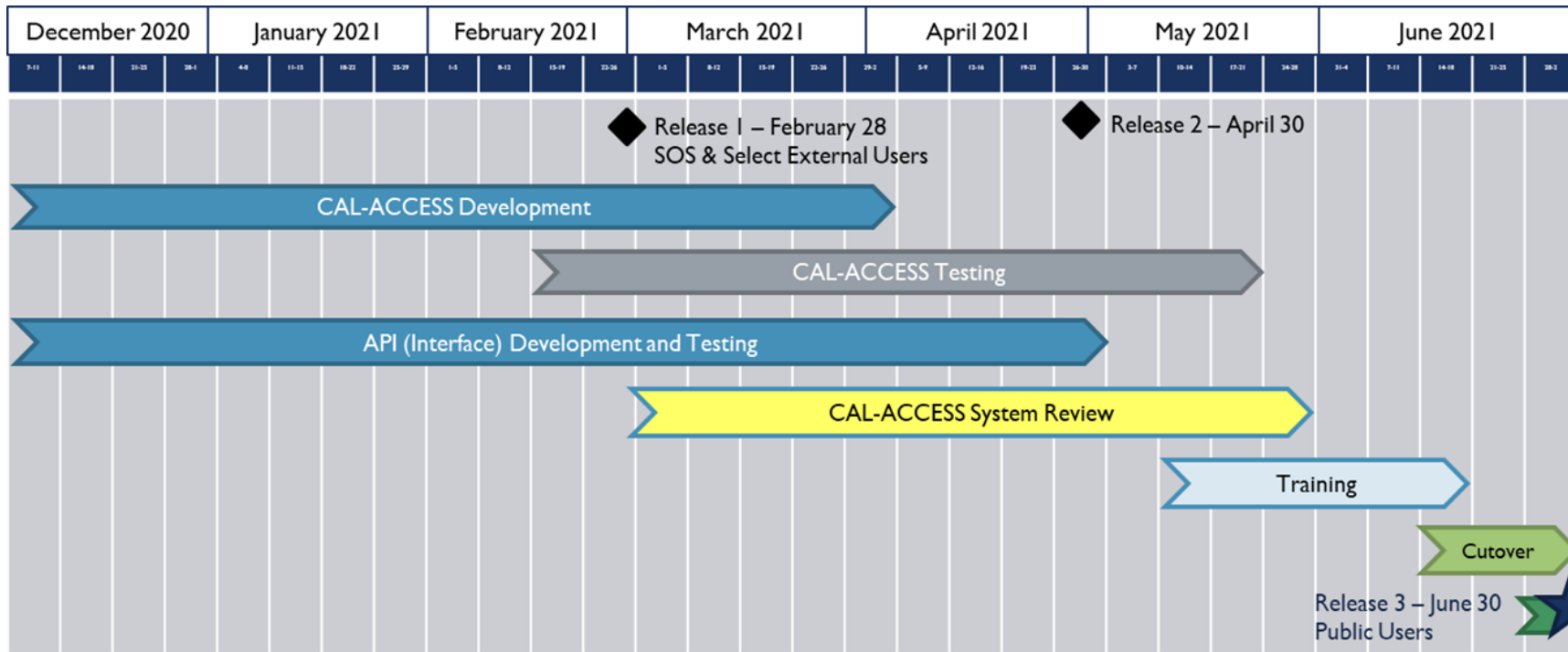
**June 30, 2021**

## BENEFITS OF A PHASED IMPLEMENTATION



- 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
- Lobbying Directory can be produced within one (legacy) system

# 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.

- 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.

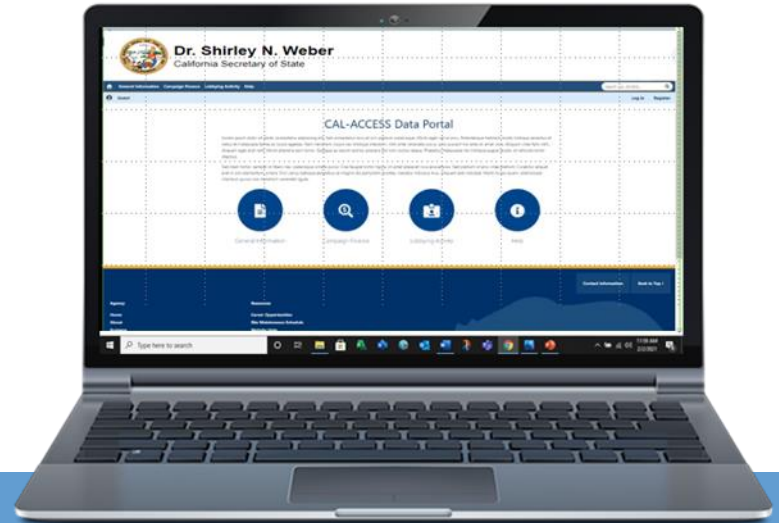
## CERTIFICATION OF THE SYSTEM



- 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.



# DEMONSTRATIONS: LOBBYING & USER SIGN-IN



Q & A / WRAP UP

**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**

