Alex Padilla
California Secretary of State

CARS PROJECT STAKEHOLDER INPUT GROUP (SIG) MEETING

JANUARY 20, 2021

10:30 AM – 12:00 PM

AGENDA

- CARS Project Update
- Certification of the new CAL-ACCESS
- SIG Review of the new CAL-ACCESS
- Demonstration
- Final Q&A and Wrap-Up

CARS PROJECT UPDATE
COMPLETED AND UPCOMING ACTIVITIES

- Completed a second round of testing in December 2020

- SOS User Acceptance Testing (UAT) starts in 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.

Plans are being finalized for a revised 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

- Provides improved product delivery

- Enables SOS users to gain ability needed to assist external users

- 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

- Minimizes changes during lobbying registration period

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 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 and certification.

- The Certification Checklist created by SOS includes criteria for system certification.

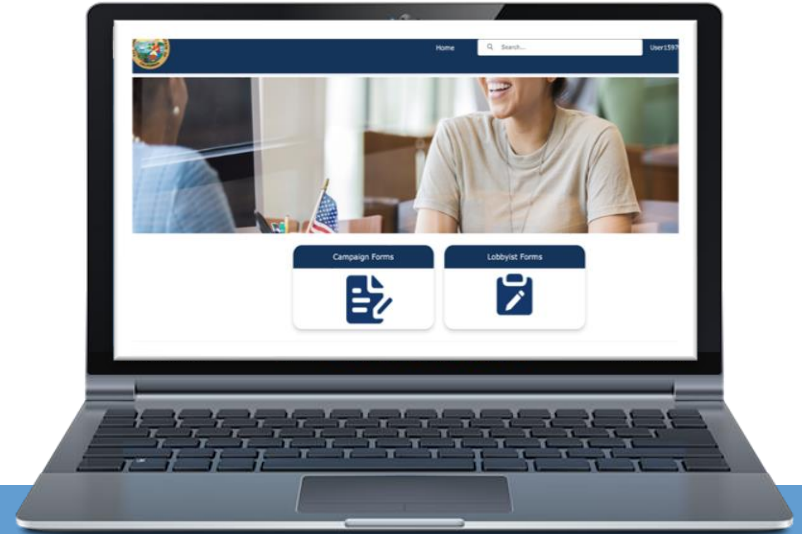- We are running a parallel activity for certification of software vendors.

SIG REVIEW OF THE NEW CAL-ACCESS

- System review will occur between March and May.

- FPPC, FTB, and Stakeholder Input Group (SIG) will participate.

- If you have not submitted information for your two reviewers…

  Please submit the names and email addresses to Hailey Coursey at hcoursey@sos.ca.gov by Friday, January 22.

- Input from the review will be utilized by the CARS Testing Team for consideration in June and for future releases.

DEMONSTRATION OF THE 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