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California Secretary of State



CARS PROJECT STAKEHOLDER INPUT GROUP (SIG) MEETING

DECEMBER 2, 2020

10:30 AM – 12:00 PM

AGENDA



- Welcome
- New CAL-ACCESS Progress Overview
- Phased Go-Live Approach
- New CAL-ACCESS Instructional / Informational Materials
- Q&A and Wrap-Up

NEW CAL-ACCESS PROGRESS OVERVIEW



- Completed initial development of the following
 - Public Data Portal
 - Candidate Registration
 - Campaign Registration
 - Lobbying Registration
- Completed first round of SOS testing in October
- Engaged stakeholders through meetings, updated the project website, and produced an October CARS Newsletter

NEW CAL-ACCESS PROGRESS OVERVIEW

CONTINUING ACTIVITIES



- Continuing development of the following
 - Financial Transaction Business Rules
 - User Accounts and Notifications
 - Correspondence
 - Disclosure Functionality (Committees, Candidates, Major Donors, Lobbying, etc.)
- Continuing meetings with Software Vendors and integration testing of the new interface

PROGRESS OVERVIEW UPCOMING ACTIVITIES



- Meetings with “good government” organizations, the media, and other stakeholders
- December 2020: SOS testing new development
- Mid-January/Mid-February 2021: SOS User Acceptance Testing of the new CAL-ACCESS

PROGRESS OVERVIEW

JANUARY SIG REVIEW OF THE NEW CAL-ACCESS



- SIG Chairs designate three people from their organization
 - Three CPTA and three CPAA = Six total participants
 - Participants can be “core” or “alternate” SIG members
 - Chairs should email their names to PRDCARS@sos.ca.gov no later than Friday, December 18
- Input from the review will be utilized by the CARS Testing Team for consideration in a future release (beyond the initial February 28 Go-Live)

PHASED GO-LIVE APPROACH



- **February 28, 2021: Initial Go-Live of the new CAL-ACCESS**
 - Migration of historical data prior to initial Go-Live of the new system
 - Certification of the system at initial Go-Live (target)
- **Planned “releases” of additional functionality during the SI’s Maintenance and Operations (M&O) Phase**
 - Additional Go-Lives (releases to production) on preplanned schedule
 - Primarily back-office functionality

PHASED GO-LIVE APPROACH ROAD TO THE NEW CAL-ACCESS GO-LIVE



1: JUNE 2020
Requirements analysis and
development planning

1

2: JULY AND ON-GOING
System Design/Development

2

3: OCTOBER
SOS Testing

3

4: DECEMBER
SOS Testing

4

5: MID-JAN THRU MID-FEB 2021
SOS User Acceptance Testing

5

6: FEBRUARY
SOS User Training

6

7: FEBRUARY
"Cutover" (1 WEEK)

7

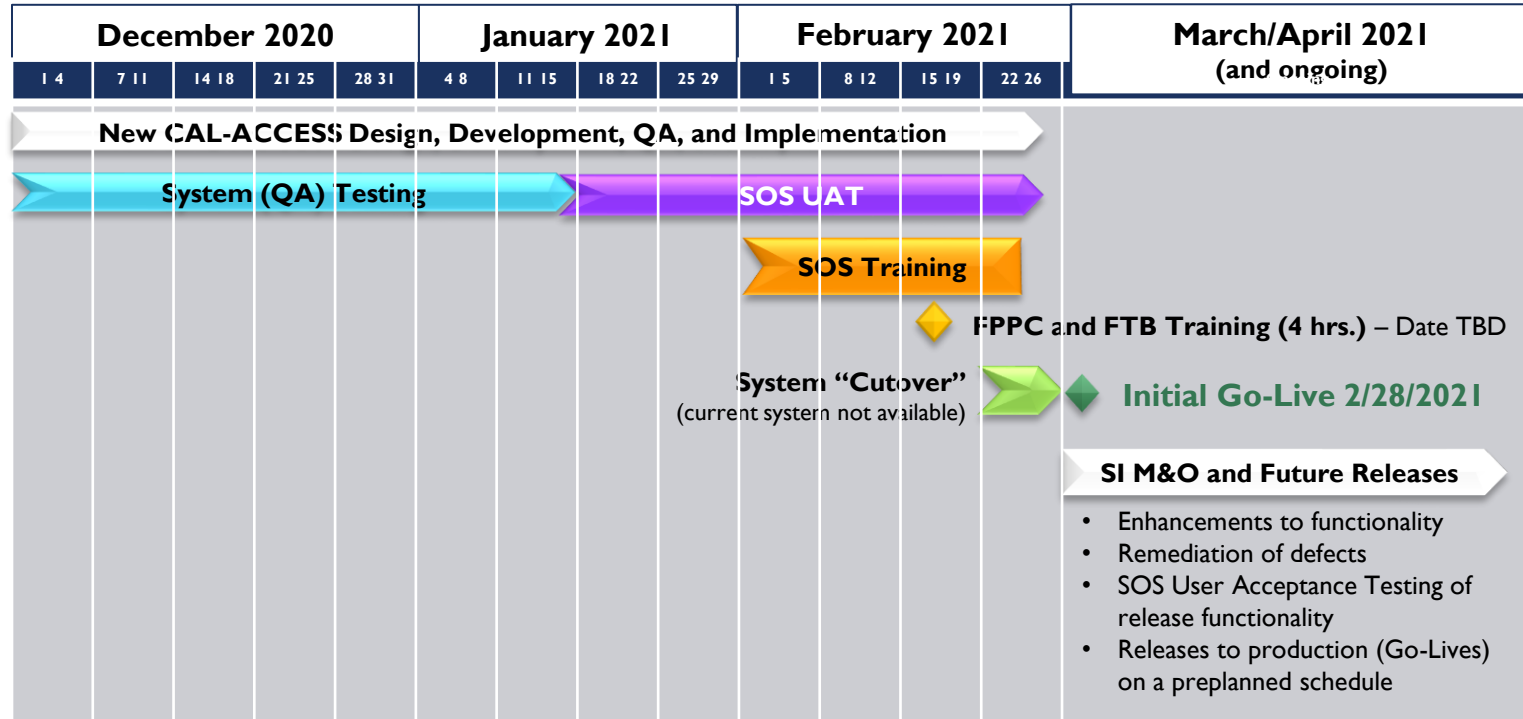
8: FEBRUARY 28 GO-LIVE
*Future "Release" Go-Lives
During SI M&O Phase*

8



PHASED GO-LIVE APPROACH

GO-LIVE TIMELINE





- By February 28, 2021: New CAL-ACCESS instructional/informational materials will be posted to the SOS website
- Updates to CAL-ACCESS instructional and reference materials will be made for future releases of functionality (if needed)
- Approximately February 28, 2021: The final API specifications will be posted to the SOS website. *(Specifications are being shared with software vendors involved in interface integration testing.)*

Q&A / WRAP-UP



Q & A Wrap-Up

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

CAL-ACCESS Replacement System Project (CARS) Updates

