



# AGENDA

- Welcome
- CARS Project Update
- Certification of the New CAL-ACCESS
- Software Vendor Registration
- Demonstration
- Q&A / Wrap Up



## CARS PROJECT UPDATE COMPLETED AND UPCOMING ACTIVITIES



- Completed a second round of testing in December 2020
- SOS User Acceptance Testing (UAT) starts mid-February.
- Regular meetings and testing with the Software Vendor Subgroup
- 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.

# CARS PROJECT UPDATE

## REVISED PHASED IMPLEMENTATION APPROACH



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

# CARS PROJECT UPDATE

## BENEFITS OF THE NEW APPROACH



- Provides improved product delivery
- Provides additional time for software vendors to test the API
- Provides additional time for software vendors to be certified
- Enables SOS to gain ability needed to assist external users and software vendors / service providers

# CARS PROJECT UPDATE

## 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 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.

# SOFTWARE VENDOR REGISTRATION / FILER AUTHORIZATION

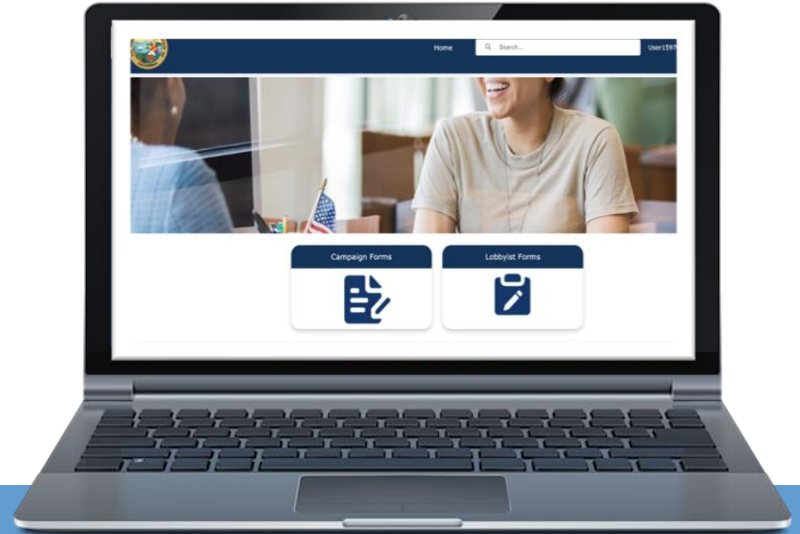


- Software vendors can complete registration online via the Filer Portal
- Each filer (individual signer/verifier) will need to complete a one-time authorization for a vendor to act on their behalf
  - At the time of the first software vendor filing submission, the system will notify the filer and ask for confirmation
  - Or...the system will notify the filer and ask for confirmation the with the first filing submission from the vendor.





# DEMONSTRATION: VENDOR REGISTRATION





# 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, news, 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**

