



Alex Padilla
California Secretary of State



NEW CAL-ACCESS INFORMATION SESSION

DECEMBER 9, 2020

1:00 PM – 3:00 PM

AGENDA



- Welcome and Introductions
- CARS Project Overview
- Phased Go-Live Approach
- CAL-ACCESS Development and Testing Update
- API (Interface) Development and Testing Update
- Preparing SOS for Training and Go-Live
- Q&A
- Demo Session (Optional)

WELCOME



Secretary of State participants...

Executive Office,
Political Reform Division,
Information Technology Division,
Archives, Elections, and other CARS project stakeholders



CAL-ACCESS REPLACEMENT SYSTEM (CARS) PROJECT OVERVIEW

Introducing, the new and improved



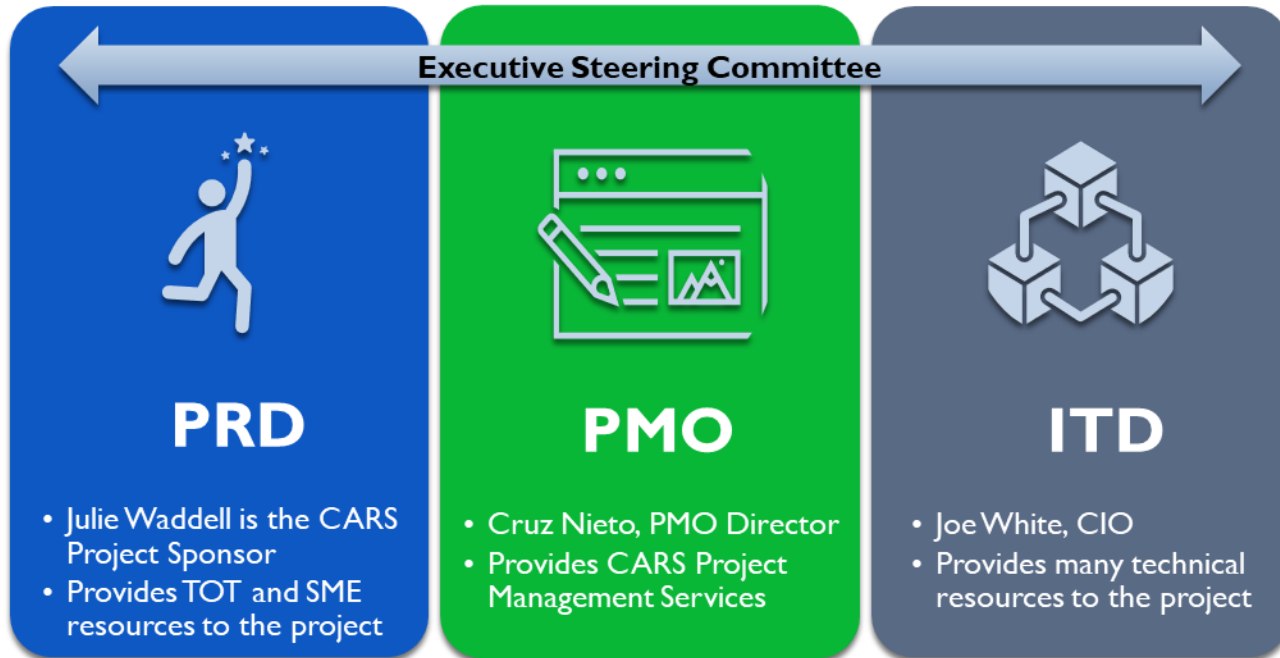
CARS PROJECT OVERVIEW



- The CARS project is important – It replaces a core system that is key to our filing officer duties and administering the Political Reform Act
- The current system has met our needs for many years but is now unreliable, costly to maintain, and does not utilize modern technology
- The CARS project is complex, highly visible to the public, and touches most Political Reform Division business processes
- We have accomplished a great deal in 2020; have targeted February 28, 2021, as the initial launch; and plan to release additional functionality throughout early 2021

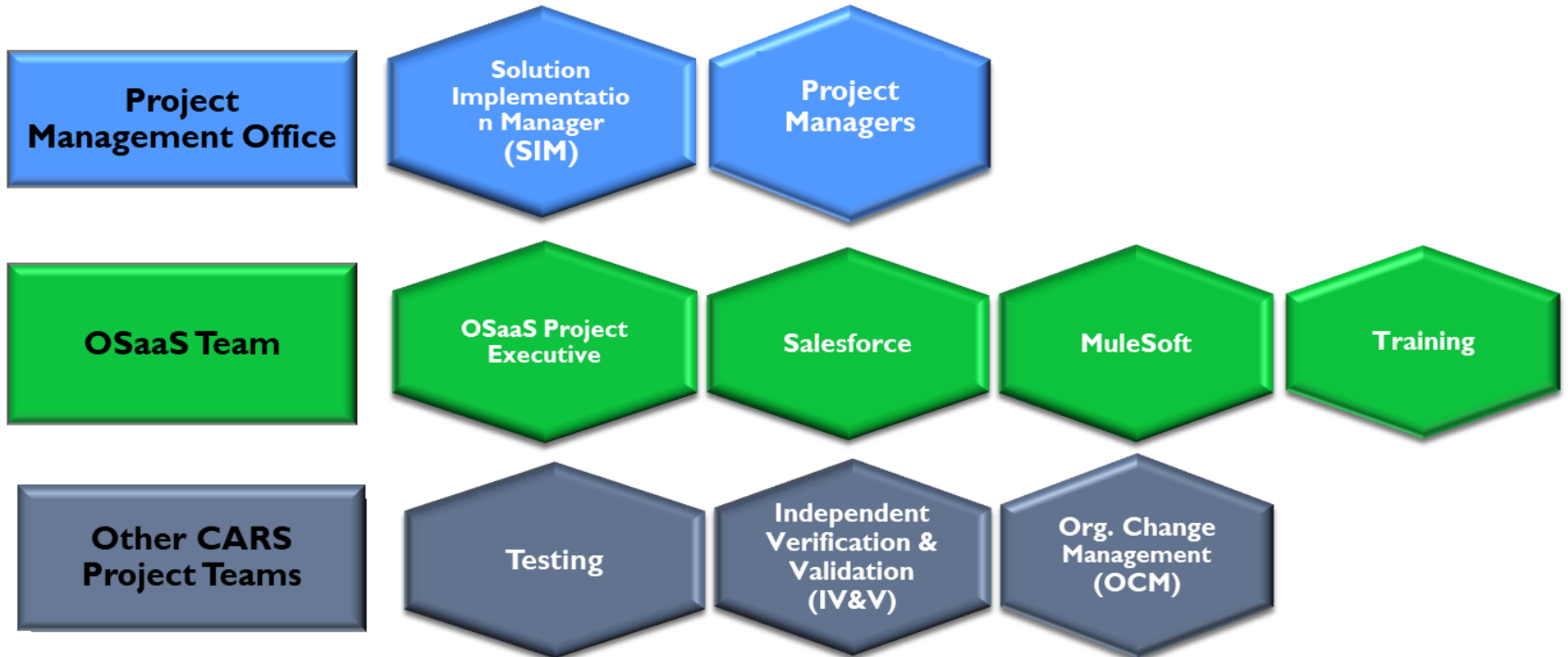
CARS PROJECT OVERVIEW AND INTRODUCTIONS

PROJECT LEADERSHIP



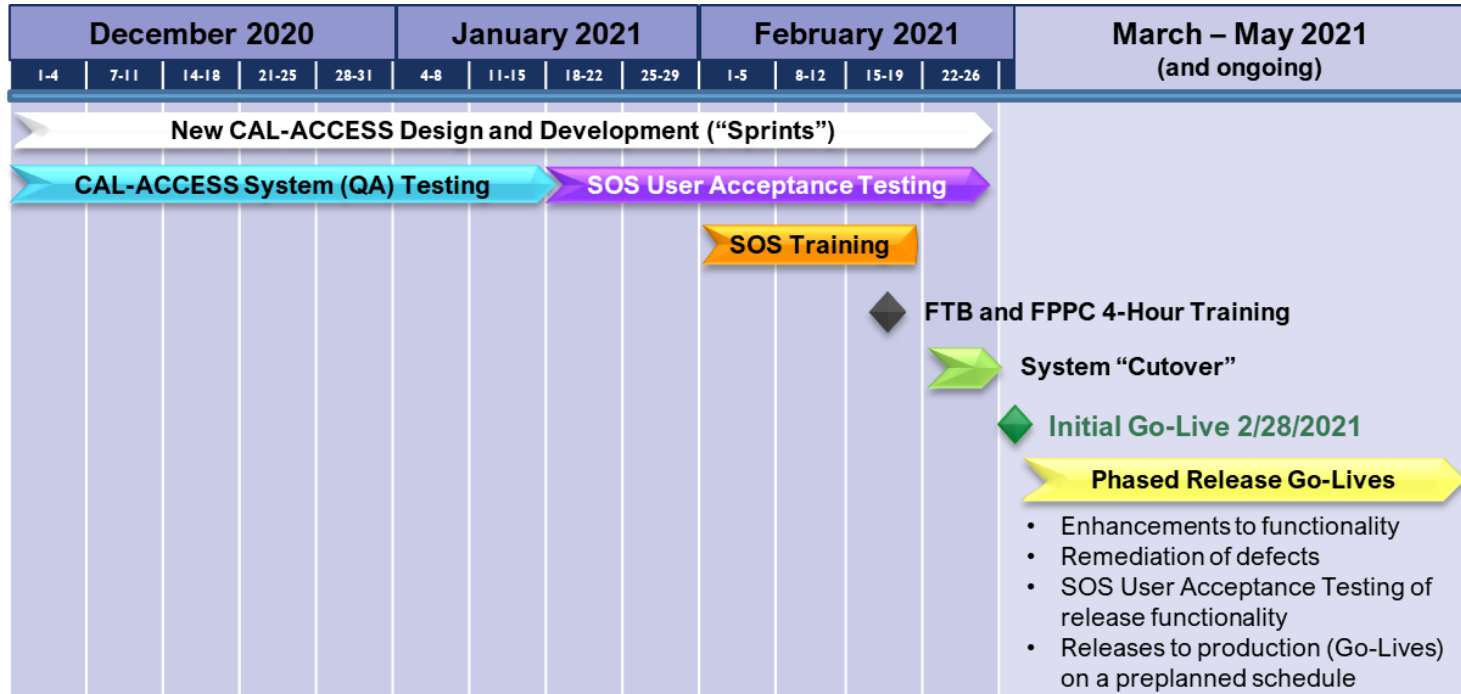
CARS PROJECT OVERVIEW AND INTRODUCTIONS

PROJECT TEAM CONSULTANTS



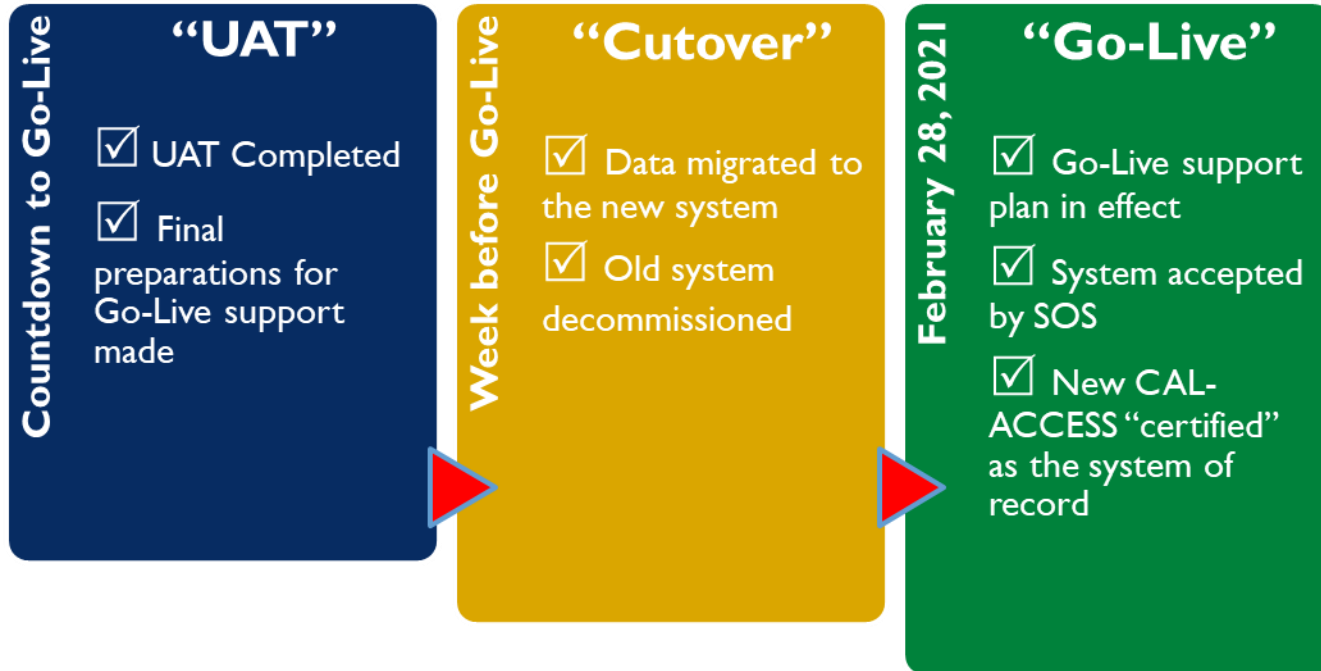
CARS PROJECT OVERVIEW

PROJECT TIMELINE



CARS PROJECT OVERVIEW

KEY ACTIVITIES LEADING TO GO-LIVE



NEW CAL-ACCESS PHASED GO-LIVE APPROACH



- February 28, 2021: Initial Go-Live
- March through May 2021: Go-Lives of additional “releases”
 - Additional releases of functionality are planned for the end of March, April and May 2021
 - Releases will provide primarily “back office” functionality – such as sending correspondence
 - The goals if for releases to be “seamless” to external users



CAL-ACCESS DEVELOPMENT AND TESTING UPDATE

Introducing, the new and improved



CAL-ACCESS DEVELOPMENT AND TESTING COMPLETED ACTIVITIES



- 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 DEVELOPMENT AND TESTING CONTINUING ACTIVITIES



- Continuing development of the following
 - Financial Transaction Business Rules
 - User Accounts and Notifications
 - Correspondence
 - Disclosure Functionality (*Committees, Candidates, Major Donors, Lobbying, etc.*)
- SOS testing new development during December 2020
- Continuing to meet with external stakeholders to provide information and demos

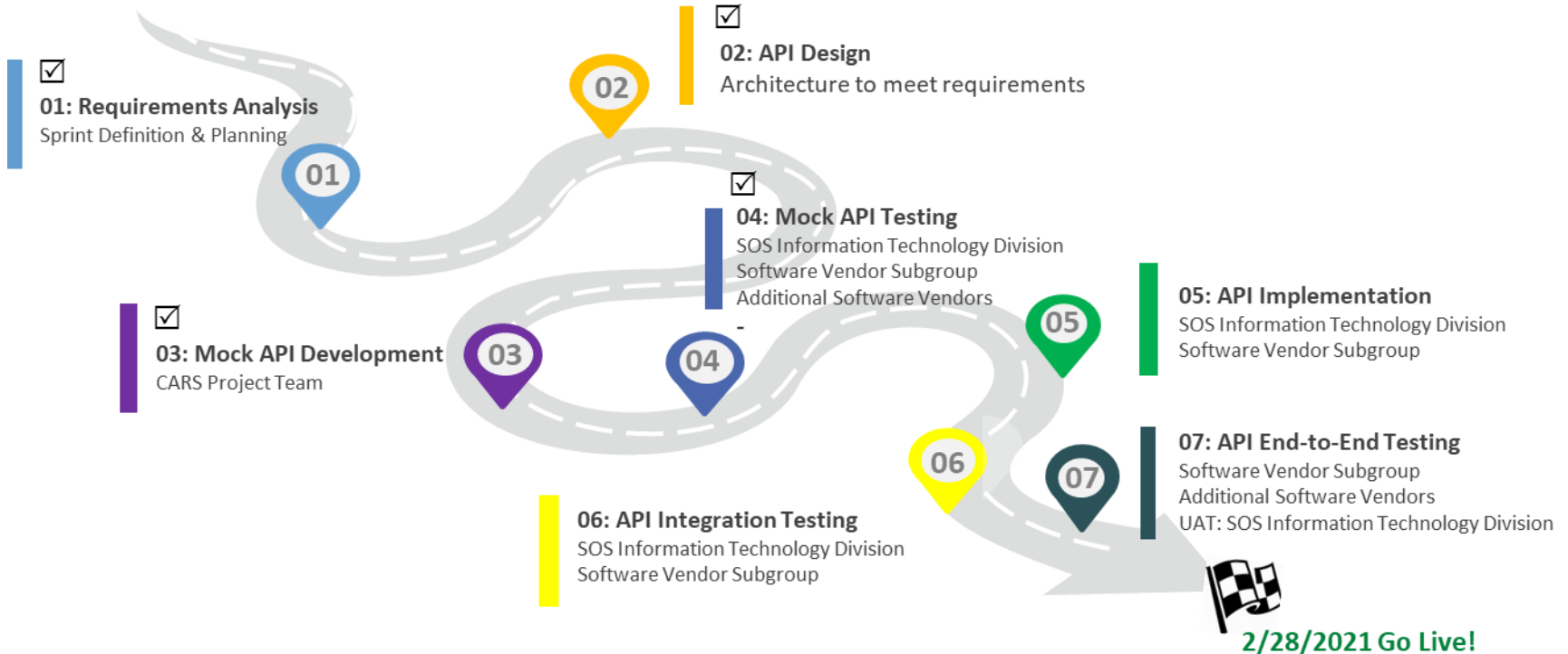


APPLICATION PROGRAMMING INTERFACE (API) DEVELOPMENT AND TESTING UPDATE

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API DEVELOPMENT AND TESTING ROADMAP



PROGRESS SUMMARY

API DEVELOPMENT AND TESTING



■ Completed Activities

- Completed API “road mapping” and API design
- Established API testing process and tools
- Developed Mock API
- Developed API

■ Continuing and Upcoming Activities

- API refinement
- API Integration Testing with Software Vendors
- Finalize API specifications and publish on the CARS Project website on February 28 (for vendor certification starting in February 2021)



PREPARING SOS FOR TRAINING AND GO-LIVE

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access**

NEW CAL-ACCESS IMPLEMENTATION ROADMAP



1: JUNE 2020
Requirements analysis and development planning

1



2: JULY 2020 (through "Cutover")
System Design/Development
(As of 12/9, we have completed seven of the nine planned "sprints")

2



3: OCTOBER 2020
SOS Testing

3

4: DECEMBER 2020
SOS New CAL-ACCESS Information Session
Business Process Walkthrough Sessions
Change Readiness Assessment
SOS Testing

4

5: MID-JAN THRU MID-FEB 2021
SOS User Acceptance Testing
Pre Go-Live demos/engagement with stakeholders

5

6: FEBRUARY 2021
SOS User Training & FTB/FPPC Training
IT "Knowledge Transfer" from OSaaS

6

7: FEBRUARY 22-27, 2021
"Cutover" (CAL-ACCESS not available / data conversion)

7

8: FEBRUARY 28 GO-LIVE!

8

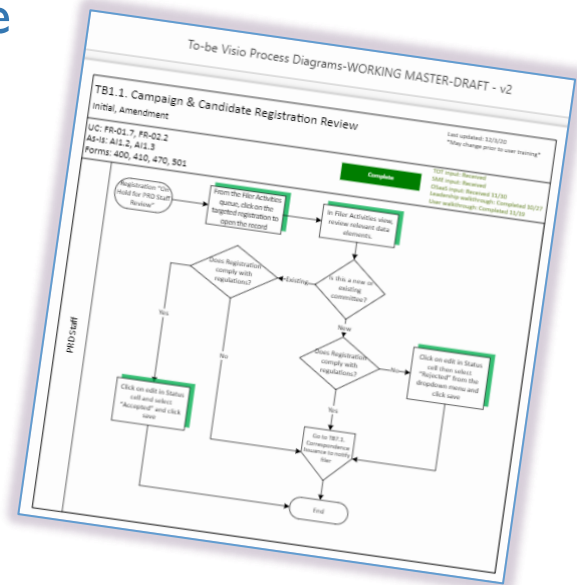
*Future "Release" Go-Lives
(end of March / end of April)*



BUSINESS PROCESS WALKTHROUGH SESSIONS



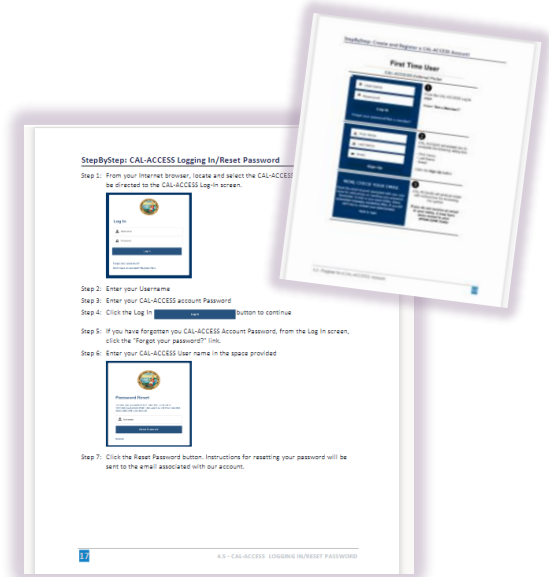
- Approximately 27 business process diagrams are being prepared by the OCM Team
 - PRD's Training and Outreach Team (TOT) and business area "Subject Matter Experts" review diagrams to ensure system functionality and business needs are aligned
- November/December 2020: TOT members are conducting business process walkthrough sessions
 - Diagram walkthroughs help CAL-ACCESS users picture how they will perform work using the new system
- Diagrams will be used as part of CAL-ACCESS training to provide context for the lessons



CAL-ACCESS TRAINING – FEBRUARY 2021



- Business users will receive OSaaS instructor-led webinar training (TOT will be present)
- Training will utilize “Learning by Doing”
 - Listening and watching how it’s done
 - Engaging in guided exercises
 - Instructing someone else how to do it (i.e. new staff)
- ITD staff will receive technical “knowledge transfer” from OSaaS
- Training materials will be provided by OSaaS for use after training



CHANGE READINESS ASSESSMENT / SURVEY



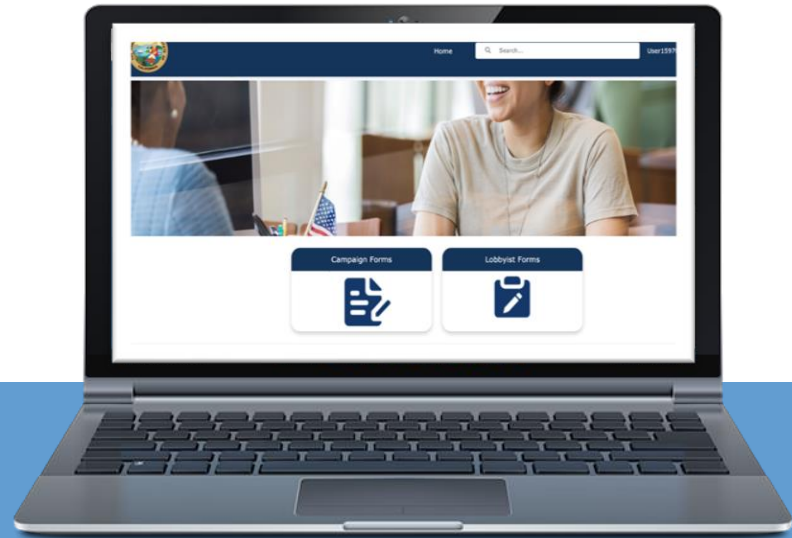
- **Purpose:** To ensure users have adequate knowledge in preparation for training and Go-Live
- **Participants:** PRD and ITD primary users/supporters and their managers *(will receive an email invitation with a link to the survey)*
- **Timing:** Late December 2020
- Will take approximately 20 minutes to complete
- CARS OCM consultants will use their Survey Monkey account *(to ensure confidentiality, only summary statistics for groups of ten or more will be provided to SOS)*

MEETING Q & A





DEMO SESSION





- Public Registration / Disclosure Portal
- Look and navigation of the SOS internal user portal

WHERE TO FIND PROJECT INFORMATION



Visit the CAL-ACCESS project website

<https://www.sos.ca.gov/campaign-lobbying/cal-access-replacement-system-project-cars-updates/>

- FAQs (updated regularly)
- Presentations from stakeholder meetings
- Next issue of the CARS Project Newsletter to be published at the end of December or early January

CARS Email Address: Submit questions and comments to the CARS project team:
PRDCARS@sos.ca.gov

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

