



November 22, 2022

Dear outgoing Members or Members with constituents impacted by redistricting:

Thank you for your service to Congress and to the American people. Whether you are leaving the institution or preparing to represent a district with new boundaries in the 118th Congress, you have a few key decisions to make about your stewardship of the information your constituents have entrusted to you.

You may not be aware that as a Member of Congress, information your constituents provide to your team in the course of casework is legally considered your personal property. This means that the decision whether to transfer constituent information to incoming Members is entirely up to you.

For constituents with open casework with your office, this decision is critical: not transferring casework information can lead to significant disruption for your constituents, especially those with time-sensitive cases, and negate the hard work your team has already put into resolving constituent issues.

We strongly encourage outgoing and redistricting Members to discuss options with their staff to ensure continuity of constituent services for constituents you have represented in the 117th Congress. The information on the next page will walk you through your options to authorize a full or partial transfer of information in your Constituent Management System (CMS) to incoming Members and Members-Elect.

Your team may also consider acting to advise constituents with open cases that this transfer is coming and give constituents the option to weigh in on how their data will be transferred. We have included template letters in this packet to make this process as smooth as possible for your constituents and your staff.

Additional information and the interactive data transfer form are available from the Chief Administrative Officer at transition.house.gov. While the final deadline for data transfer decisions is the first day of the 118th Congress, offices are strongly encouraged to return this form as early as possible, ideally by the beginning of December.

Please do not hesitate to reach out if our team can be a resource as your office navigates this transition.

Sincerely,

Marci Harris
Cofounder & Executive Director

Anne Meeker
Director of Special Initiatives

ENSURING CONTINUITY IN CONSTITUENT SERVICE

CMS DATA TO TRANSFER

Correspondence

- ✉ Correspondence (including opinions)
- ✉ Letter library (including your casework form letters)
- ✉ eNewsletter (distribution lists, templates, and past editions)

Casework Data

- ✉ Constituent contact information
- ✉ Agency contact information
- ✉ Open Cases
- ✉ Closed Cases

CMS TRANSFER

Request that your CMS provider automatically transfer your data using the CAO's secure data portal.

Pros

- Secure
- Convenient
- Can choose which specific cases and types of data to transfer

Cons:

- Some CMS vendors charge for this service
- Incoming Members may not accept transfers

MANUAL TRANSFER

Have your team download case files from your CMS provider and send them to new Members.

Pros

- No CMS transfer fees

Cons

- Labor- and time-intensive
- Greater chance of mishandling constituent information

ENSURING CONTINUITY IN CONSTITUENT SERVICE

TRANSFER PROCESS

01

Returning Members in Redistricting

Complete the “Constituent Data and Casework Files Disposition” form at transition.house.gov.

02

Departing Members

Complete the “CMS Data Consent” form at transition.house.gov.

03

Follow Up

Your CMS vendor will be automatically notified of your choice; however, we’d recommend following up to confirm.

04

Alert Your Constituents (Optional)

Send out a short form letter to advise affected constituents that their representative will be changing in January.

05

Let Them Opt Out (Optional)

Allow constituents to contact your office to opt out of having their cases transferred.