

Legislative Constituent Management System (LCMS) Manual

The Legislative Constituent Management System (LCMS) is a state-official program used by the CA Legislature to log and access files for constituents and cases opened within a given District and under the representative of that District.

Finding the Application/Logging In

In order to enter the computer system, you must be logged in through a staff member's account, using both a username and password to gain access.

An acceptable account to log in under is Angie's:

Username: aramayam

Password: eclipse1

Navigating the System

LEGISLATIVE
Constituent Management System

My Profile Quick Forms In District? Reminders Feedback Help Log Off

Home Constituents Legislation Data Selection Reports Surveys

Assemblymember
Nazarian, Adrienne

WELCOME ANGIE ARAMAYO

Inbox:

- » Bill Comments: 7
- » Newsletter Requests: 0
- » Surveys: 0

Open Contacts:

- » Today: 48
- » This Week: 292
- » Last 6 Months
- » My Drafts: 1

My Cases: Total Number of Cases: 9

| Case | Constituent | Open Since |
|----------------------------------|-------------------|------------|
| Turf Removal | Vu, Samuel, Agnes | 06/01/2015 |
| Insurance Coverage on Medication | Holland, Cheryl | 09/23/2015 |
| Medical Issue | Castillo, Erolia | 08/19/2016 |
| Covered CA | Garcia, Melchor | 12/22/2016 |
| CALHFA MAC Guidelines | Champion, Ann | 12/29/2016 |
| DMV Registration Cancellation | Avitia, Lucia N | 06/30/2017 |

News:

August 2017

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | | |

August Deadlines

August 21st Legislature reconvenes from Summer Recess (J.R. 51 (a)(3)).

New Constituent

New List Contact

New Casework

Who Is Online:

- AD46
- Angie Aramayo
- Brian Stedje
- Steven Butcher

Resources:

[Member Offices Division eServices Team](#)

On the home screen of LCMS, you will see the most current and relevant information open on the system. In the center of the home page, you will have access to any open cases that you have begun, along with the constituents involved in the case and the date that the case was created. On the right hand side of the screen, you will be able to select from one of three options: **New Constituent**, **New List Contact**, and **New Casework**. To create a file for a person within the District that is not yet in our system, you will go to **New Constituent**. To add a new constituent to a certain list, you will go to **New List Contact**. To open up a new casework for a constituent, you will go to **New Casework**. Underneath these options, those currently logged into the LCMS within your District will be displayed.

Recording Data in LCMS

LEGISLATIVE
Constituent Management System

Home Constituents Legislation Data Selection Reports Surveys

Assemblymember Nazarian, Adrin

CONSTITUENTS

INDIVIDUALS

CONSTITUENTS SEARCH

Last Name: Thomas First Name: Robert M.I.:
Address Line: 11914 Kling St City: Zip:
Email: Phone: Voters/Non-Voters: All

Search Reset

Total Number of Constituents Returned: 7 [Print]

| | Name | Address | City | State | Zip |
|---|-------------------------|--------------------------|-----------------|-------|-------|
| 1 | Thomas, Robert A.* | 8117 Paso Robles Ave | Van Nuys | CA | 91406 |
| 2 | Thomas, Robert E.* | 8532 Columbus Ave Unit 2 | North Hills | CA | 91344 |
| 3 | Thomas, Robert E., Jr.* | 10419 Bloomfield St | Toluca Lake | CA | 91602 |
| 4 | Thomas, Robert L.* | 11914 Kling St Apt 25 | Valley Village | CA | 91606 |
| 5 | Thomas, Robert L.* | 5235 Kester Ave Apt 210 | Sherman Oaks | CA | 91403 |
| 6 | Thomas, Robert M.* | 6228 Whitsett Ave Apt 2 | North Hollywood | CA | 91605 |
| 7 | Thomas, Robert W.* | 3855 Riverton Ave Apt 6 | Studio City | CA | 91604 |

When receiving a call, email, letter, or in person message from a constituent on a particular bill or state-related issue that we assist with, you must log it into LCMS. In order to do this, you must either search for or create a file for the constituent involved in this case. Generally, you can find a constituent by searching up the full name and confirming it with their address, or any other given information such as their phone number or email. **When searching for a constituent, you must enter their name precisely or the system will not be able to register the information correctly.** If you are unsure of the correct spelling for a name, you may enter a “%” and it will display all possible options within the range of the text (ex. You receive a letter from a constituent whose writing is illegible, and you can’t tell if it reads “Adam” or “Adan”, you may input “Ada%” and it will show all possible results).

In order to record a constituent’s stance on a bill, you will first either find and select their file or create a new file for them if they are not already in LCMS. Once you have done this, you should be on their file and see all available information on the constituent (name, address, phone number, events they have attended, bills or issues they have expressed their opinions on, etc.) On the upper right hand corner of their file, you will select “List”. This will allow you to type in the List Name (e.g. legislative bill or a general issue), and select the constituent’s stance on the bill.

Creating a New Constituent

Under either the **Home** page or the **Constituents** tab, you may select to create a file for a new constituent. To do this under the home page, you will click on the **New Constituent** button on the upper right hand side of the screen. To do this under the **Constituents** tab, click on the **Create** option under the **Individuals** category on the left hand side of the screen. Once you select to create from either screen, you will enter all the given constituent information into the following page. Here, you will fill out the constituent's:

1. **Full Name** (First, M.I., Last)
2. **Address**
 1. Line 1- Address Number and Street Name
 2. Line 2- Apartment, Unit, Suite #
3. **Email**
4. **Phone Number**
 1. Home
 2. Cell
 3. Office (add extension if necessary)

LEGISLATIVE
Constituent Management System

My Profile Quick Forms In District

Home Constituents Legislation Data Selection Reports Surveys

CONSTITUENTS: CREATE

Assemblymember
Nazarian, Adrin

CONSTITUENTS

INDIVIDUALS

Search

Create

ORGANIZATIONS

Search

Create

CASEWORK

Search

My Cases

LISTS

Search

Create

My Lists

My Open Contacts

LIAISONS

Search Liaisons

Create Liaison

Search Agencies

Create Agency

Categories

Create

Constituent Information

First Name: Robert M.I.: Last Name: Thomas Prefix: None Suffix: None

Email: robertthomas@gmail.co Birth Date: (mm/dd/yyyy)

Gender: Unknown Honor:

Residence Address

Line 1: 11914 Kling St Apt 25

Line 2:

City: Valley Village

State: CA Zip: 91607

Mailing Address

Line 1:

Line 2:

City:

State: CA Zip:

Phones

Preferred: Home Phone: (818) 625-8874 Ext.:

Affiliation

Organization:

Unsubscribe

Do Not Mail

VIP

Phone

Affiliations

You must have, at minimum, a full name and either an address or phone number/email that we may be able to reach them at. If a constituent calls to file a complaint, we must have some way of getting in contact with them in the future to follow up on the case.

Creating a New List

If you do not see a legislative bill or general stance on an issue already logged into the system when searching for it, you must create a list for it. When doing so, you will want to have information on either the bill or issue, as well as the stance on the topic. To create a new list for a legislative bill, you will first want to be on the **Constituents** tab of LCMS. Once you are under this tab, select the **Create** option under the **Lists** category on the drop down menu to the left hand side of the screen. If you are creating a new list for a particular bill (ex. AB 17, SB 562), you will want to select **Type: Legislative**. Under **Measure**, select the kind of legislative bill that you are creating (most likely either AB or SB), then enter the number of the bill. Once you press Search, LCMS will automatically register the information and select what bill this is using the name and description for the bill. Once you see this information appear, select the **Stance** on the bill (oppose/support) and select **Create**.

Constituent Management System

Home Constituents Legislation Data Selection Rep

Assemblymember Nazarian, Adrin

CONSTITUENTS

INDIVIDUALS

ORGANIZATIONS

CASEWORK

LISTS

LIAISONS

Search

Create

My Lists

My Open Contacts

Search Liaisons

Create Liaison

Search Agencies

Create Agency

Categories

LISTS: CREATE

Type: ☒ Legislative ☐ General

Measure: AB 17 Session: 2017-2018

Topic: AB 17 2017-2018 Transit Pass Pilot Program: free or reduced

Search

Stance: Oppose

Name: AB 17 2018 Oppose

Description: Transit Pass Pilot Program: free or reduced-fare transit passes.

Staff: Angie Aramayo

Create Reset

If you are creating a new list for a general issue (ex. Support Planned Parenthood), you will want to select **Type: General**. Under **Name**, give the list a title that will be able to be easily searched for and recognized for others to find. Under the **Description**, you may enter anything related to this list topic (if you do not have anything to put in the description, simply copy and paste the

List Name). Once you complete this information, select **Create**.

LEGISLATIVE Constituent Management System

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WELCOME ANGIE ARAMAYO

Inbox: > Bill Comments: 6 > Newsletter Requests: 1 > Surveys: 0

Open Contacts:

New Constituent New List Contact New Casework

See Who Is Online:

AD46
• Angie Aramayo
• Brian Stedje

Resources:
[Member Offices Division eServices](#)

My Cases: Total Number of Cases: 0

Turf Removal
Insurance Coverage on Medication
Medical Issue
Covered CA
CALHFA MAC Guidelines
DMV Registration Cancellation

News:
August 2017

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New Casework

*First Name: Fred *Last Name: Herbert

Email: Phone: (818) 255-2022 ext: Type: Home

*Address: PO Box 16694 *City: North Hollywood *State: CA Zip: 91615

*Case Name:

*Description:
Credit cards and purse stolen from Hometown Buffet @ Van Nuys Plant. Access to transport card re-orders issues, time maybe 7-8 weeks
referred to Supervisor Kuehl's office

Priority: Routine

None
All Staff
Andrew Hartz
Angie Aramayo

Email Staff: Angie Aramayo

Assign to Staff: Angie Aramayo

Status: Open

Create Cancel Reset

* Indicates required field

LEGISLATIVE
Constituent Management System

Home Constituents Legislation Data Selection Reports

Assemblymember
Nazarian, Adrin

CONSTITUENTS

INDIVIDUALS
Search
Create

ORGANIZATIONS
Search
Create

CASEWORK
Search
My Cases

LISTS
Search
Create
My Lists
My Open Contacts

LIAISONS
Search Liaisons
Create Liaison
Search Agencies
Create Agency
Categories

LISTS: CREATE

Type: ☐ Legislative ☒ General

Measure: All Session: 2017-2018

Topic:

Stance: Select

Name: Support Planned Parenthood

Description: Support Planned Parenthood

Staff: Angie Aramayo

Create Reset

Creating a New Casework

In order to open up a new casework, you will go to the LCMS home page and select **New Casework** on the right hand side of the screen. You will open up a new casework if you recognize that a constituent has called or come into the office to file a complaint on a state-related matter that we cover. It is important to have as much information on the case as possible, in order for a field representative to get back to the constituent on the issue. In order to file for a new casework, you will want to have:

1. The constituent's name
2. Case Title
3. Description

Give as much detail on the case as possible, in order for a field rep (Angie, Steven, Emma) to later look at the case file and be able to follow up with the constituent efficiently.

Pulling Data From LCMS

1. Open LCMS and click on the tab **Data Selection**
2. Under Data Selection, you will find a drop-down bar on the left-hand side. You will want to select from the first section on this menu, **Extracts**. Under the **Extracts** category, you will click on the subcategory **Data Criteria**.
3. After selecting this subcategory, a window will pop up with a number of different tabs to choose from. This will allow you pull lists based on a number of different factors.
-First, click on the **Households** tab and uncheck the box that says "household the data" (this separates each individual constituent on the list from one another).

The screenshot shows the 'Constituent Management System' interface. The top navigation bar has tabs for Home, Constituents, Legislation, Data Selection, and Reports. The left sidebar has a menu with categories like DATA SELECTION, EXTRACTS, FORMS, HTML, IMAGES, and MY FOLDERS. The main content area shows the 'EXTRACTS: DATA CRITERIA' section with tabs for Constituents, Households, Geographic, Precincts, Lists, Responses, and Extracts. The 'Lists' tab is active, displaying a list of criteria: 'Senior Calls 2017', 'Senior Calls 2017 - 1', 'Senior Calls 2017 - 2', 'Senior Calls 2017 - 3', 'Senior Calls 2017 - 4', and 'Senior Calls 2017 - LM'. A red circle highlights the 'Lists' tab and the list of criteria. Another red circle highlights the 'Include' button in the 'Contact Type' dropdown menu. At the bottom, there are buttons for 'Save Extract' and 'Create File'.

-Next, click on the **Lists** tab. It will ask you to search for the list that you want to pull data from, so type in the name of the list (ex. Senior Calls 2017 -- LM), select the list once it appears on the screen, and click **Include** on the right hand side of the screen. Afterward, save the extract, give it a title

under **Extract Name** and under **Type:**, you will select **Solicited Mail** (in order to close the contacts and not leave them on the list for future letters/emails to be sent to them). Then, click "Create". Finally, click "Qualify"- this will now display everyone on the call list to now be on the excel sheet (to confirm that it qualified each individual, look somewhere on the middle/upper right-hand side after this step and it should go from showing the number of individuals on the list from 0 to however many names are on the list).

-Next, click on the **Data File** tab.

Select what information to add in the Excel sheets. For most lists, you will select **First Name, Last Name, Address, Preferred Phone Number, Email Address** to add to the Excel sheet. Then, click "Create File".

-Next, you are going to close the contacts on the list that was pulled. Again, this will allow you to use this list in the future to send letters to new LM contacts without sending another letter to those that you already sent messages to in the past. To do this, go to **Lists** and click on **Mail To**. In this step, it is only important that for **Mail Type:**, you select **Solicited Mail**. For the **LCMS Template, Label, and Envelope** selections, it does not matter what you choose to input as long as you select something for each one.

Legislation Data Selection Reports

Available Columns

- Gender
- Birth Date
- Registration Date
- Precinct
- Assembly District
- Senate District
- Congressional District
- Role
- Organizations
- Organization URL
- Middle Initial
- Name Prefix

Columns Selected

- First Name
- Last Name
- Address
- Email
- Preferred Phone

Sort Columns

- Last Name
- First Name
- Precinct
- City
- Zip
- Birth Date

Sort By

Selection Criteria

- Include Lists: Senior Calls 2017 -- LM
- Solicited - Open Contacts or KMI

Output Address Type:

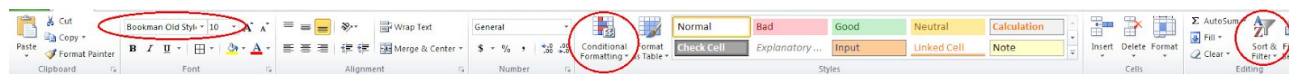
☐ Mailing ☒ Residence

File Name:

Senior Calls 2017 LM

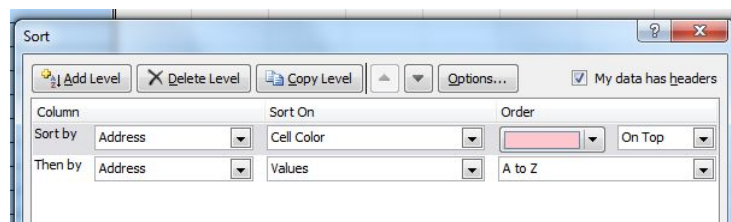
Create File

How to Deduplicate in Excel



| | A | B | C | D | E | F | G | H | I | J | K | L | M | N |
|-----|-------------|-------------------|---------------------------|---------------|----|-------|-----------------------|-----------------------------|---|---|---|---|---|---|
| 145 | Robert | Neches | 9111 Lemona Ave Unit 33 | North Hills | CA | 91343 | (818) 895-6990 (home) | | | | | | | |
| 146 | Francine | Bergman | 9354 Burnett Ave Unit 122 | North Hills | CA | 91343 | (818) 753-7868 (home) | | | | | | | |
| 147 | John | Gidhamner | 9354 Burnett Ave Unit 122 | North Hills | CA | 91343 | (818) 753-7868 (home) | | | | | | | |
| 148 | Martin | Dibbini | 9561 Woodley Ave | North Hills | CA | 91343 | (818) 893-2913 (home) | | | | | | | |
| 149 | Nadia | Musharbaah | 9561 Woodley Ave | North Hills | CA | 91343 | (818) 893-2913 (home) | | | | | | | |
| 150 | Than | Lam | 9603 Van Nuys Blvd Unit H | Panorama City | CA | 91402 | (818) 894-1399 (home) | | | | | | | |
| 151 | Suong | Nguyen | 9603 Van Nuys Blvd Unit H | Panorama City | CA | 91402 | (818) 894-1399 (home) | | | | | | | |
| 152 | Patricia | Fernandez | 9624 Odessa Ave | North Hills | CA | 91343 | (818) 895-7239 (home) | | | | | | | |
| 153 | John | Johnson | 9624 Odessa Ave | North Hills | CA | 91343 | (310) 866-8252 (home) | johnjohnson8@gmail.com | | | | | | |
| 154 | Enrique | Avila | 9655 Aqueduct Ave | North Hills | CA | 91343 | (818) 920-9975 (home) | | | | | | | |
| 155 | Aurora | Chavira | 9655 Aqueduct Ave | North Hills | CA | 91343 | (818) 920-9975 (home) | aurora_chavira@hotmail.com | | | | | | |
| 156 | Orlando | Giron | 9800 Vesper Ave Unit 63 | Panorama City | CA | 91402 | (818) 893-8231 (home) | | | | | | | |
| 157 | Rubidia | Henriquez | 9800 Vesper Ave Unit 63 | Panorama City | CA | 91402 | (818) 893-8231 (home) | | | | | | | |
| 158 | Rachel | Havercroft | 10000 Gavista Ave | North Hills | CA | 91343 | (818) 894-4157 (home) | | | | | | | |
| 159 | Erindina | Amecua | 10061 Gavista Ave | North Hills | CA | 91343 | (818) 894-7583 (home) | raballen7@hotmail.com | | | | | | |
| 160 | Alan | Shwyz | 10009 Gerber Ave | North Hills | CA | 91343 | (818) 831-5694 (home) | anwayne@clarefoundation.org | | | | | | |
| 161 | Harry | Sarian | 10009 Hayvenhurst Ave | North Hills | CA | 91343 | (818) 366-6676 (home) | | | | | | | |
| 162 | Alla | Kuznetsova | 10010 Sophia Ave | North Hills | CA | 91343 | (818) 247-4958 (home) | | | | | | | |
| 163 | Gregorio | Arenas | 10014 Woodley Ave | North Hills | CA | 91343 | (818) 830-0481 (home) | | | | | | | |
| 164 | Manjesh | Ghadremani Anzani | 10015 Whitaker Ave | North Hills | CA | 91343 | (818) 366-9369 (home) | | | | | | | |
| 165 | Lynn | Teler | 10020 Montgomery Ave | North Hills | CA | 91343 | (818) 895-7654 (home) | | | | | | | |
| 166 | Seon & John | Kim | 10021 Whitaker Ave | North Hills | CA | 91343 | (818) 368-1536 (home) | | | | | | | |

1. First, highlight a column that you want to use to de-duplicate (in this case, highlight the Address column).
2. Under the **Home** tab on the Excel document, click on the selection **Conditional Formatting** in the **Styles** category. Under the drop-down menu that opens for this selection, select **Highlight Cell Rules** and then **Duplicate Values**. Confirm that you are formatting cells that contain **Duplicate** values with **Light Red Fill with Dark Red Text** and click "OK".
3. Next, under the Editing category, select Sort & Filter and Custom Sort. First, sort by Address, Cell Color, and Red (on top). Then, click Add Level and sort by Address, Values, and A to Z.
4. Combine any names that contain the same Last Name and Address. If there is a duplicate address but different last names, do not combine them.
5. Format the Excel sheet (Brian's preference)

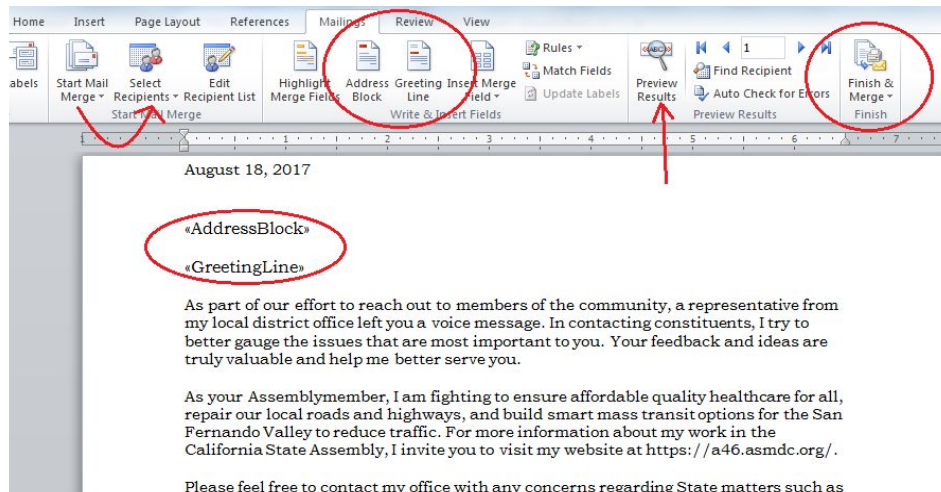


-Font: Bookman Old Style

-Font Size: 10

-Re-label & bold first line for each column (First, Last, Address, City, State, Zip, Phone, Email)

-Create borders around each cell box.



August 18, 2017

«AddressBlock»

«GreetingLine»

As part of our effort to reach out to members of the community, a representative from my local district office left you a voice message. In contacting constituents, I try to better gauge the issues that are most important to you. Your feedback and ideas are truly valuable and help me better serve you.

As your Assemblymember, I am fighting to ensure affordable quality healthcare for all, repair our local roads and highways, and build smart mass transit options for the San Fernando Valley to reduce traffic. For more information about my work in the California State Assembly, I invite you to visit my website at <https://a46.asmdc.org/>.

Please feel free to contact my office with any concerns regarding State matters such as

How to Mail Merge on Word

In order to utilize the data that you pull from LCMS, you will need to start a mail merge and transfer all of the information from the Excel sheet onto a given letter template.

1. Select **Start Mail Merge**, and under the drop down menu that appears with this option you will choose **Letters**.
2. Click on **Select Recipients**, and under the drop down menu that appears with this option you will choose **Use Existing List**. Find the Excel sheet with the list of names that you need and open it onto the document.
3. Select **Edit Recipient List** to see the names and confirm that they match up with the list you wanted to select.
4. At the top of the document, where you would put their name and mailing address, you will select **Address Block** from the **Mailings** tab and choose “Joshua and Cynthia Randall” as the name formatting.
5. Below the Address Block, add the **Greeting Line** and choose “Dear Joshua and Cynthia” as the greeting formatting.
6. From the **Mailings** tab, select **Preview Results** and make sure it looks the way you would like it to. If it does, select **Finish & Merge** and choose to **Edit Individual Documents**.