

Leveraging ChatGPT for Caseworkers

ChatGPT Enterprise

Introduction

Use ChatGPT Enterprise to turn supplied information into useful first drafts. These 30 chat prompts support official congressional office work. Replace bracketed placeholders and paste the relevant source text before you begin.

For Caseworker / Constituent Services Representative: focus on administrative intake, factual case summaries, agency inquiries, and clear constituent updates. Adapt assignments to your office; House and Senate titles and responsibilities vary.

Goals

This guide is meant to help:

- Create practical drafts for your daily work.
- Make handoffs and review requirements clear.
- Keep claims traceable to supplied sources.

Guidelines & guardrails

Use ChatGPT in the ChatGPT Enterprise environment responsibly within your organization's approved guidelines. Before using it for work, keep in mind:

- Use only information permitted in your approved workspace; use fictional or de-identified examples for practice.
- Verify facts, dates, citations, and chamber-specific procedures with current sources.
- Keep official work separate from campaign activity. Staff review all outputs before use or release.

Effective prompting

You can use simple English language instructions (or “prompts” & “queries”) in ChatGPT, and the model responds based on those prompts. Better prompts - that are more thoughtful, clear, and articulate - will yield more useful responses. Keep in mind that every good prompt has:

- **Task** - What are you asking ChatGPT to do?
- **Context** - What additional information or documents should it be aware of?
- **Expectations** - How do you expect the final output to be formatted?

Take a simple example:

- Original prompt: "Help me prepare for work."
- Add in task: "Draft a constituent case status update."
- Add in context: "Draft a constituent case status update. For our [House/Senate] office, use [Approved notes] for [Audience]."
- Add in expectation: "Draft a constituent case status update. For our [House/Senate] office, use [Approved notes] for [Audience]. Keep it to one page, with next steps and facts to verify."

Sample prompts

Choose a prompt, replace its brackets, and paste the named notes or source excerpts. State the chamber, audience, deadline, and desired format. Review the draft, then ask for a focused revision. Prompts do not retrieve live information or take external actions.

Role grounding, reviewed September 21, 2026.
Original workflow prompts; office procedures govern actual work.

Senate position descriptions: role responsibilities
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CRS staff guide (2012): role and title background.

House Resume Bank: House role names.

House Green & Gold: casework and field duties.

OpenAI: using ChatGPT and reviewing results.

Intake and Clarification

Request summary

Best used with: Chat.

Turn [De-identified constituent request] into a concise intake summary. Separate the requested assistance, known agency, stated timeline, and missing information. Do not infer the merits of the request or promise an outcome. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Clarifying questions

Best used with: Chat.

Draft up to five questions needed to understand [De-identified service request] using [Office intake procedure]. Explain why each is needed. Do not request sensitive identifiers through an unapproved channel. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Intake acknowledgment

Best used with: Chat.

Draft a warm 150-word acknowledgment using [Approved office language] and [De-identified request]. State the next administrative step and supplied contact route. Avoid promising agency action or a resolution date. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Intake and Clarification

Consent-status follow-up

Best used with: Chat.

Draft an administrative follow-up using [Office's approved consent-request wording] and [Recorded status]. Identify what staff say remains missing and the approved return channel. Do not decide whether a form is sufficient. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Incomplete packet note

Best used with: Chat.

Compare [De-identified packet contents] with [Office's supplied checklist]. Draft a neutral request for missing items only. Flag ambiguous requirements for the supervisor rather than inventing documentation demands. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Case Summaries

Chronology draft

Best used with: Chat.

Organize [De-identified case notes] into a chronology with date, event, source, and open question. Preserve the difference between constituent statements and agency responses. Mark uncertain dates rather than estimating them. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Supervisor briefing

Best used with: Chat.

Prepare a one-page supervisor brief from [De-identified case record]. Include the request, verified administrative history, steps taken, and questions needing direction. Do not recommend a substantive agency determination. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Source reconciliation

Best used with: Chat.

Compare [Constituent account] and [Agency correspondence] in de-identified form. List factual agreements, discrepancies, and questions to clarify. Avoid deciding credibility or filling gaps from general knowledge. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Case Summaries

Case-note cleanup **Best used with:** Chat.

Rewrite [Rough de-identified case note] as a concise factual record. Preserve dates, attribution, and pending actions while removing speculation. List ambiguities separately so staff can confirm them. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Handoff summary **Best used with:** Chat.

Draft a case handoff using [De-identified chronology] and [Pending actions]. Include last verified contact, relevant procedure source, next step, and supervisor questions. Do not mark actions complete without evidence. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Agency Inquiries

Initial inquiry draft **Best used with:** Chat.

Draft a factual inquiry to [Agency liaison role] using [De-identified case summary] and [Office-approved inquiry format]. State the administrative question and requested status information. Keep identifiers as placeholders for authorized staff handling. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Status request **Best used with:** Chat.

Write a concise follow-up to [Agency] based on [Previous inquiry] and [Recorded response history]. Ask about the current administrative status without asserting a missed deadline unless documented in supplied instructions. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Clarification request **Best used with:** Chat.

Draft a follow-up to [Agency response] about [Specific unclear passage]. Quote the relevant short phrase and ask a precise factual question. Do not interpret an individual determination or challenge it with invented facts. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Agency Inquiries

Document receipt check

Best used with: Chat.

Draft a message asking whether [Named document] was received, using [Recorded submission details]. Include dates only when documented and leave sensitive identifiers as placeholders. Do not imply receipt or review has occurred. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Agency call preparation

Best used with: Chat.

Prepare a call agenda from [De-identified case chronology] and [Open administrative questions]. Give a short factual opening, three questions, and a note-taking template. Do not invent agency contact instructions. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Constituent Updates

Pending-response update

Best used with: Chat.

Draft a 150-word constituent update from [Verified case status]. Explain the last action, what remains pending, and the next staff step. Use respectful language and do not promise timing or results. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Agency-message explanation

Best used with: Chat.

Rewrite [Agency correspondence excerpt] in plain language for a constituent, preserving its exact qualifications. Separate what the letter states from questions to ask the agency. Do not offer an independent determination. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Missing-information reminder

Best used with: Chat.

Draft a courteous reminder about [Outstanding requested item] using [Approved instructions]. Explain the supplied submission route and invite clarification. Do not suggest the constituent will lose access to services unless explicitly established by staff guidance. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Constituent Updates

No-new-information update

Best used with: Chat.

Write a brief update when [Recorded status] has not changed. Acknowledge the wait, state verified follow-up actions, and avoid inventing progress. Use [Office communication standard] for next-contact expectations. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Closure communication

Best used with: Chat.

Draft a closure message only from [Supervisor-approved closure explanation]. Summarize documented office assistance, agency response, and supplied contact options. Do not imply the underlying problem was resolved unless evidence says so. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Follow-Up and Coordination

Next-action checklist

Best used with: Chat.

Turn [De-identified case notes] into a checklist of administrative follow-ups. Tie each task to a source note, identify dates needing confirmation, and flag questions for the supervisor. Do not autonomously determine case priority. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Appointment preparation

Best used with: Chat.

Draft an administrative preparation note for [Constituent appointment] using [Approved office instructions]. Include purpose, confirmed logistics, and requested materials. Do not invent agency requirements or promise a particular result. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Referral draft

Best used with: Chat.

Draft a referral message using [Supervisor-approved destination] and [Verified contact instructions]. Explain the limited reason for the referral and the next step. Do not independently determine which organization has authority over the matter. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Follow-Up and Coordination

Internal coordination note

Best used with: Chat.

Write a concise note to [Other office team] about [De-identified case-related administrative question]. Share only the context needed for that question. Keep individual case details out of general policy or communications updates. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Follow-up date review

Best used with: Chat.

Compare [Recorded follow-up dates] with [Supplied office and agency timing guidance]. Identify conflicts and dates without supporting instructions. Return questions for staff review rather than creating new deadlines. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Record Quality

Record completeness check

Best used with: Chat.

Review [De-identified case summary] against [Office case-note checklist]. Flag missing chronology, source attribution, contact records, and next actions. Do not judge the merits of the case. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Factual language audit

Best used with: Chat.

Identify speculative or judgmental phrases in [De-identified case notes]. Suggest neutral alternatives that preserve what was actually reported. Do not erase material facts or infer motives. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Status consistency check

Best used with: Chat.

Compare [Case summary], [Last agency message], and [Draft constituent update]. Flag conflicting statuses and unsupported claims of completion. Identify which source passage staff should confirm. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Record Quality

Closure evidence checklist

Best used with: Chat.

Create a checklist from [Office closure procedure] for staff to review [De-identified case]. Separate recorded agency action, office follow-up, and supervisor approval. Do not close the case or determine the outcome. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.

Practice scenario

Best used with: Chat.

Create a fictional administrative casework scenario about a delayed agency response, using [Office procedure]. Include intake notes, a sample status inquiry, and reviewer questions. Avoid real personal data and substantive agency determinations. Use only the supplied information. Flag missing facts and assumptions; identify what a staff reviewer must verify.