



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

CAPPS Desk Aid

Creating and Managing Checklists in Recruit

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

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Creating and Managing Checklists in Recruit

Overview

This desk aid outlines how to create and manage applicant checklists during the recruiting process. The checklists can be:

- Used as tools to assist with the recruiting process. Checklists track the individual tasks the applicant or recruiting team must complete to successfully hire the applicant in compliance with the agency's business process.
- Accessed only by the recruiter. The applicant does not have access.
- Helpful due to the higher granularity compared to the disposition process.
- Tailored for a specific applicant, a large group of applicants or a timeframe. Additionally, the information in the checklists is available via a PeopleSoft Query — users can extract and download to their workstation for offline analysis.
- Assigned to applicants at any stage in the process (depending on the agency's business process) and can extend beyond the hire date (if necessary).

The user should be familiar with:

- Logging in to CAPPS HR/Payroll.
- Navigating in or around CAPPS HR/Payroll and using either or both the tiles that are provided based on the users' security and/or the NavBar.
- Creating a job opening.
- Posting a job opening.
- Searching for:
 - Job openings
 - Applicants
 - Applications
- Performing advanced searches.
- Following the agency's recruiting/business process.

The Disposition Process

Disposition is the overall process that simplifies:

- Tracking applicants.
- Determining an applicant's eligibility for hire.
- and–
- Locating where an applicant failed in the recruiting process.

There is a sequence of seven general statuses (stages):

1. Applied
2. Reviewing
3. Screening (most common stage to use a checklist)
4. Routing
5. Interviewing
6. Offer
7. Hire



Even though *Screening* is the most common stage to use a checklist. However, based on agency business needs, the stage the checklist is assigned to the applicant will vary.

Also, it is possible to set up and use multiple checklists. For example, use one checklist for reviewing and another for screening.

Creating and Managing Checklist Items

Creating Checklist Items

Navigation

Navbar: Set Up HRMS; Common Definitions; Checklists; Checklist Items

1. Navigate to the *Checklist Items* page.
2. Select **Add a New Value**.
3. Enter the agency SET ID.
4. Enter a 12-character CHECKLIST ITEM CODE (alphanumeric).

Tip: If you don't know the 12-character CHECKLIST ITEM CODE, use the SET ID search (magnifying glass) icon to find existing checklist items (agency SET ID must be populated).

5. Select **Add**.
The *Checklist Items* page displays.

Note: The default for the STATUS field is *Active*.

Note: CAPPS is not currently using the LINK ID field.

6. Enter the EFFECTIVE DATE that the item will be available (or select the date using the calendar icon).
7. Enter a DESCRIPTION.

Note: This description is displayed to the person that is managing the checklist. It is typically an action-type word or phrase (i.e., background check, request transcripts, etc.).

8. Enter a SHORT DESCRIPTION (10-character limit).
9. Enter COMMENTS (if applicable).
10. Select **Save**.
11. Select **Add** to add more items (optional).

Managing Checklist Items

Navigation

Navbar: Set Up HRMS; Common Definitions; Checklists; Checklist Items

1. Search for agency checklist items using the agency SET ID (or other search criteria).

The screenshot shows the 'Checklist Items' search page. At the top, there's a 'Find an Existing Value' section with an 'Add a New Value' button. Below that, there are search criteria options like 'Recent Searches' and 'Saved Searches'. The 'Set ID' field is set to 'begins with' and has a search icon next to it, which is highlighted with a red box and a red arrow. Below the search fields, there are checkboxes for 'Case Sensitive', 'Include History', and 'Correct History'. The 'Search' button is highlighted with a red box.

2. Select **Search**.
3. Select the item to review.
4. Review and edit fields (as necessary).

The screenshot shows the 'Checklist Items' edit page. At the top, there's a 'Set ID' field with the value '###TX' and a 'Checklist Item Code' field with the value '7000'. Below that, there's a 'Check List Item' section with a search icon and navigation buttons. The fields include: '*Effective Date' (02/16/2026), '*Status' (Active), '*Description' (Submit transcripts), 'Short Description' (Transcript), 'Link ID' (with a search icon), and 'Comments' (Request and recive the transcripts). At the bottom, there's a row of buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. The 'Save' button is highlighted with a red box.

5. Select **Save**.

Creating and Managing Checklists

Creating Checklists

Navigation

Navbar: Set Up HRMS; Common Definitions; Checklists; Checklist

1. Navigate to the *Checklist* page.
2. Select **Add a New Value**.

3. Enter the agency SET ID.
4. Enter a 12-character CHECKLIST CODE (alphanumeric).

Tip: If you don't know the 12-character CHECKLIST ITEM CODE, use the SET ID search (magnifying glass) icon to find existing checklist items (agency SET ID must be populated).

5. Select **Add**.
The *Checklist* page displays.

Note: The default for the STATUS field is *Active*.

Note: CAPPS is not currently using the LINK ID field.

*Sequence	*Item Code	Description
1	100	

6. Enter the EFFECTIVE DATE that this checklist will be available (or select the date using the calendar icon).
7. Enter a DESCRIPTION (e.g., *Support Staff Checklist*).
8. Enter a SHORT DESCRIPTION (10-character limit).
9. Ensure **Other** (default) is selected for the CHECKLIST TYPE.
10. Add each checklist item (previously defined in the *Assignment Checklist Item* section).

Tip: For simplicity, when adding future items, enter the SEQUENCE number as a multiple of three or five. This step prevents editing the SEQUENCE numbers for the entire list when adding another item at a later date. The default sequence increment is by the hundreds.

11. Select the ITEM CODE from the drop-down menu.

Tip: To display the DESCRIPTION, press the tab key to advance from the ITEM CODE to the DESCRIPTION.

12. Select **Save**.

The screenshot shows the 'Checklist' form with the following details:

- Set ID: ###TX
- Checklist Code: 7000
- Checklist Item: Support Staff Checklist
- Effective Date: 02/16/2026
- Status: Active
- Short Description: SS Chklist
- Checklist Type: Other

The 'Assignment Checklist Item' table is as follows:

*Sequence	*Item Code	Description
1	7000	Submit transcripts
2	7001	Background check
3	7002	Typing test

At the bottom, the 'Save' button is highlighted with a red box, and the 'Add' button is highlighted with a blue box.

13. Select **Add** to add more items (optional).

Managing Checklists

Navigation

Navbar: Set Up HRMS; Common Definitions; Checklists; Checklist

1. Search for the checklist using the agency SET ID field.
2. Select the desired checklist from the results.
3. Edit fields (as necessary).
4. Add **[+]** or remove **[-]** checklist items (as necessary).

This screenshot is identical to the previous one, but with the '+' and '-' buttons for each item in the 'Assignment Checklist Item' table highlighted with red boxes.

5. Select **Save**.

Note: The changes are applied to any new checklists that are created after saving the changes.

Assigning and Managing Applicant Checklists

Navigation

Navbar: Menu; Recruiting; Search Applications

1. Select the Recruiting Activities tile.
2. Search for an applicant or application using the search criteria drop-down menu.
3. Navigate to the *Manage Applications* page for that applicant/application.
4. Select **Other Actions**.
5. Select **Applicant Actions**.
6. Select **Manage Applicant Checklist**.

The screenshot shows the 'Search Applications' interface. At the top, there are navigation links for 'Recruiting Home', 'Search Applicants', and 'Search Job Openings'. Below this is a search bar with 'Quick Search' and 'Advanced Search' tabs. A red box highlights the 'Search Criteria' dropdown menu. Below the search bar, it indicates '1 Results Found'. A table of search results is displayed with columns: Select, Company, Application, Applicant, Job Opening, Disposition, Resume, Veteran?, WIT Indicator, Interest, Mark Reviewed, Route, Interview, Reject, Print, and Applicant ID. A red arrow points to the 'Other Actions' dropdown menu for the first row. The dropdown menu is open, showing options: Add Applicant Note, Add Applicant to List, Forward Applicant, Link Applicant to Job, **Manage Applicant Checklists** (highlighted with a red box), and Send Correspondence. The 'Application Actions' option is also highlighted with a red box.

Note: Selecting **Other Actions** provides more actions (when present) for a specific applicant.

The screenshot shows the 'Manage Application' page. At the top, there are navigation links for 'Return', 'Recruiting Home', 'Search Applications', 'Add Applicant Note', 'Print', and 'Refresh'. Below this is a 'Personalize' button. The page is divided into two main sections: 'Applicant' and 'Job Opening'. The 'Applicant' section shows details for Applicant ID 10037, including Name, Preferred Contact, Email, Applicant Type (External Applicant), Status (010 Active), Jobs Applied (1), Veteran? (Y), and WIT Indicator (N). The 'Job Opening' section shows details for Job Opening ID 100018, including Job Posting Title, Status (Open), Business Unit, Job Code (NONEMP (Non Employee)), Department, Recruiter, Hiring Manager, Position Number, and Salary Range (3,000.000000 to 4,000.000000 USD/Mont). Below these sections is a 'Process Application' section with a 'Disposition' dropdown, Reason, Date (03/07/2026), Interest (stars), Mark Reviewed, Route, Interview, and Reject buttons. A red box highlights the 'Other Actions' dropdown menu. At the bottom, there are tabs for 'Application and Resume', Questionnaire, Notes, Route, and Interview.

Assigning Checklists

Navigation

Navbar: Search Applications; Other Actions; Application Actions; Manage Applicant Checklists

1. Verify the SETID matches the user's agency SETID for the job opening.

The screenshot shows the 'Applicant Checklist' form. At the top, it displays 'Applicant Name' and 'Applicant ID 10017'. Below this is the 'Applicant Information' section. The 'Set ID' field is highlighted with a red box and contains the value '##FTX'. Other fields include '*Checklist Date' (02/16/2026), 'Job Opening ID', '*Checklist', 'Responsible ID' (3908), and a 'Comment' field. At the bottom, there is a table for 'Checklist Item' with columns for *Sequence, *Item Code, Description, *Task Status, *Task Status Date, Task End Date, Employee ID, Name, and Comments. The table currently has one row with 'Not Started' in the *Task Status column. Buttons for 'Add Checklist Item', 'Add Checklist', 'Save', and 'Cancel' are visible.

2. Enter the CHECKLIST DATE that indicates when the checklist was assigned to the applicant (or select the date using the calendar icon).

This screenshot is similar to the previous one but highlights the '*Checklist Date' field (02/16/2026) and the '*Checklist' field with red boxes. The 'Job Opening ID' field is also highlighted with a red box. The rest of the form, including the 'Checklist Item' table and buttons, remains the same.

3. Select the JOB OPENING ID CHECKLIST field search (magnifying glass) icon. The *Look Up Checklist* page displays with all checklists configured for the agency.

The 'Look Up Checklist' dialog box is shown. It has search criteria for 'Checklist Code' (begins with) and 'Description' (begins with). Below the search buttons are 'Search Results' with a table. The table has two columns: 'Checklist Code' and 'Description'. One row is highlighted with a red box, showing 'RS1' in the 'Checklist Code' column and 'Checklist Test 1' in the 'Description' column. The dialog also includes 'View 100', '1-1 of 1', and 'Basic Lookup' options.

4. Enter variables to search for the appropriate checklist

–or–

Select the hyperlink in the CHECKLIST CODE or DESCRIPTION.

Note: Selecting a checklist populates the *Checklist Item* section of the *Applicant Checklist* page with all configured checklist items.

5. Review the items in the *Checklist Item* section.
6. Change the SEQUENCE number (if necessary) to reorder the sequence in which the items should be worked on or completed.

Note: It is possible to have multiple checklists and items active at any time.

The ITEM CODE is the value that was used to define the item during the checklist configuration exercise and generally does not need to be updated.

7. Review the DESCRIPTION.

Select	Job Opening	Job Opening ID	Disposition	Date Applied	Last Updated	Application	Veteran?	Recruitment Location Area	Recruitment Location	Checklist Task	Resume	Mark Reviewed	Route	Interview	Reject	Print
<input type="checkbox"/>		100018	010 Applied	03/07/2025 10:25AM	03/07/2025 12:00PM		Y									

Note: In the *Applicant Activity* grid, the checklist item with the lowest sequential number (labeled *Work In Progress*) displays.

8. Select the applicable value from the TASK STATUS drop-down menu for the first item to work on with the applicant. Typically, the first status used is *Work In Progress*.

9. Review and update any additional items (as necessary).
10. Select **Add Checklist Item** to add additional applicant-assigned items/tasks to the checklist.

A new row appears in the table.

Note: Select the ITEM CODE field search (magnifying glass) icon to locate the additional item to add (if necessary).

Managing Applicant Checklists

Navigation

Navbar: Menu; Recruiting; Search Applications

1. Select the application hyperlink.
2. Select **Other Actions**.
3. Select **Application Actions**.
4. Select **Manage Applicant Checklists**.

5. Navigate to *Manage Applications* or *Manage Applicant* to see the status of the checklist item with the oldest STATUS START DATE and lowest SEQUENCE number that is *Work In Progress*.

Revision History

Date	Description of Change	Changed By
May 7, 2026	Initial release.	D. Stobee