CAPPS Desk Aid

Creating Applicant Profiles

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.

TABLE OF CONTENTS

Creating Applicant Profiles

Overview

This desk aid outlines how to create and manage applicants' information and applications, including creating an account on an applicant's behalf.

The user should be familiar with:

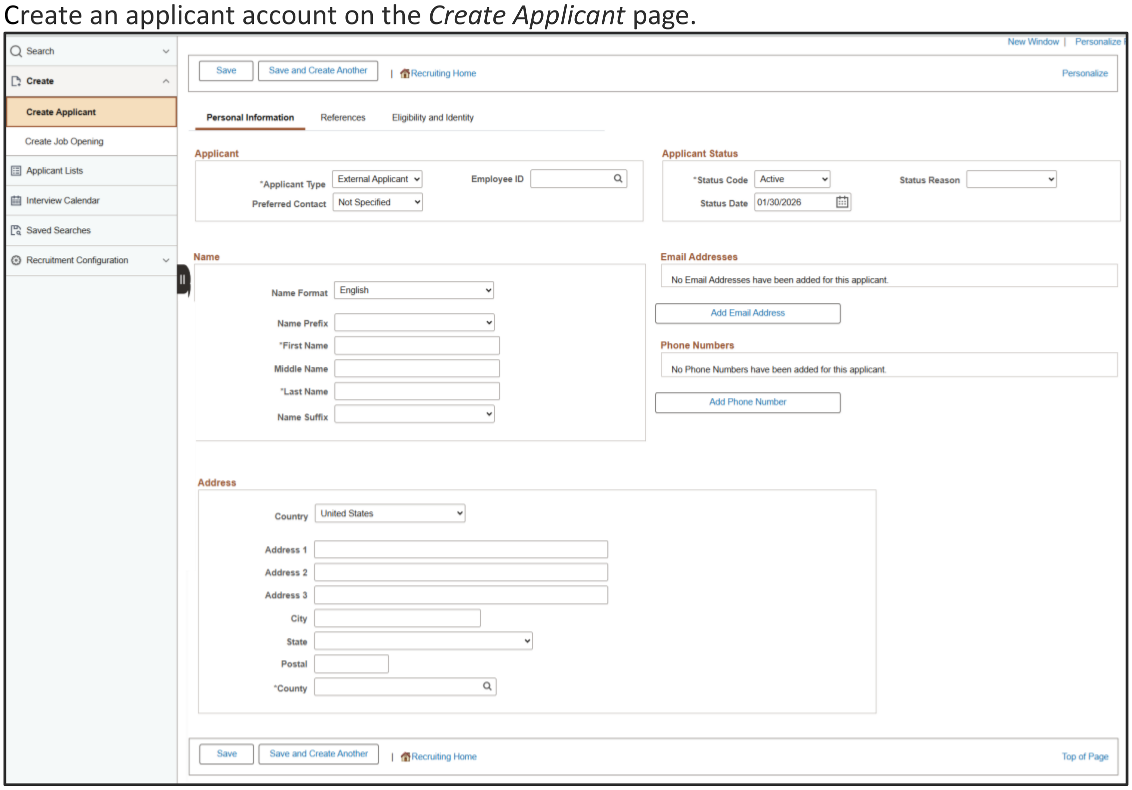
- Signing in to CAPPS HR.
- Navigating the main dashboard and using tiles.
- Completing an application.
- Selecting and assigning an application to a job opening.
- Providing referral source information.

Creating Applicant Navigation/Page Layout

Navigation

Dashboard: Recruiting; **Tile:** Recruiting Activities; Create; Create Applicant

Create an applicant account on the *Create Applicant* page.



The page contains options to:

- **Save**
- **Save and Create Another**
- **Recruiting Home**
- **Personalize**

The *Create Applicant* page has three tabs:

- Personal Information
- References
- Eligibility and Identity

Personal Information

There are six sections to complete on the *Personal Information* tab.

Applicant

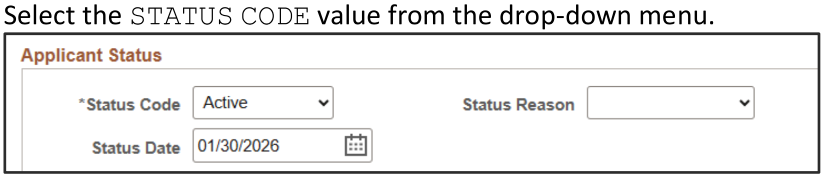
To complete the *Applicant* section:

1. Select the APPLICANT TYPE value (required) from the drop-down menu:
   - Employee
   - External Applicant
   - Non-Employee
2. Select the PREFERRED CONTACT value from the drop-down menu:
   - Email
   - Mail
   - Not Specified
   - Phone
3. Enter the EMPLOYEE ID if the applicant is a current employee.

Applicant Status

To complete the *Applicant Status* section:

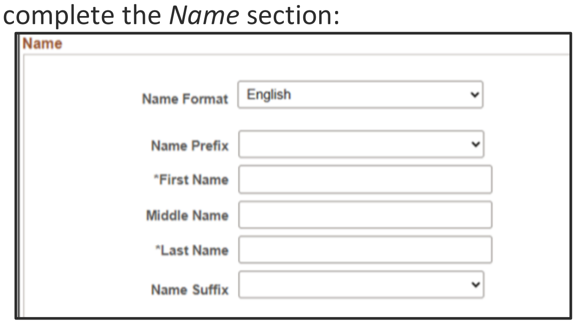
1. Select the STATUS CODE value from the drop-down menu.



2. Select the STATUS DATE using the calendar icon to reflect the date that the application was started.
3. Select the STATUS REASON from the drop-down menu (if any values are available to select).

Name

To complete the *Name* section:

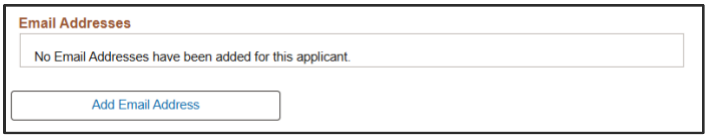


1. Select a NAME PREFIX value from the drop-down menu or leave blank.
2. Enter the applicant's FIRST NAME.
3. Enter the applicant's MIDDLE NAME (optional).
4. Enter the applicant's LAST NAME.
5. Select a NAME SUFFIX from the drop-down menu or leave blank.

Email Addresses

To complete the *Email Addresses* section:

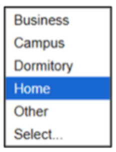
1. Select **Add Email Address**.



A grid displays with three columns:

- Primary
- Email Type
- Email Address

2. Provide the appropriate values for each column.
3. Select the **Primary** checkbox to designate a primary email address for recruiters and hiring managers to use to contact the applicant.
4. Select the `EMAIL TYPE` (required) from the drop-down menu to classify the email address.



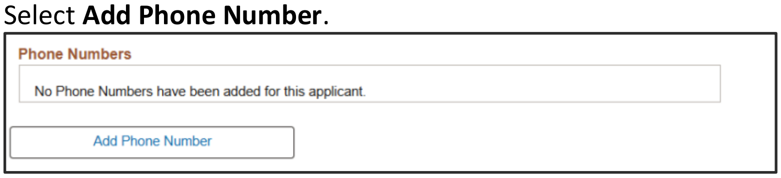
5. Enter the `EMAIL ADDRESS` (required).
6. Select **Add Email Address** to add additional email addresses.

Note: Select the trash can icon to delete a row (if necessary).

Phone Numbers

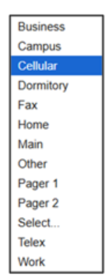
To complete the *Phone* section:

1. Select **Add Phone Number**.



The *Phone Numbers* grid displays.

2. Select the **Primary** checkbox to designate a phone number as the primary phone number for recruiters and hiring managers to use to contact the applicant.
3. Select a `PHONE TYPE` value from the drop-down menu (required).
4. Enter the `TELEPHONE` number (required).
5. Enter the `EXTENSION`.
6. Enter the `COUNTRY CODE` of the provided phone number.
   For North American phone numbers, enter **1**.
7. Select **Add Phone Number** to enter additional phone numbers.



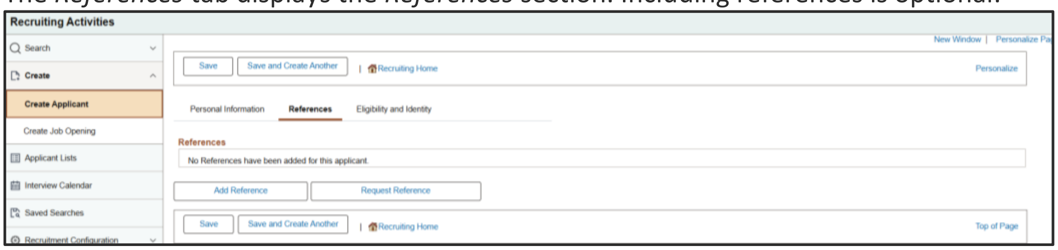
Address

To complete the *Address* section:

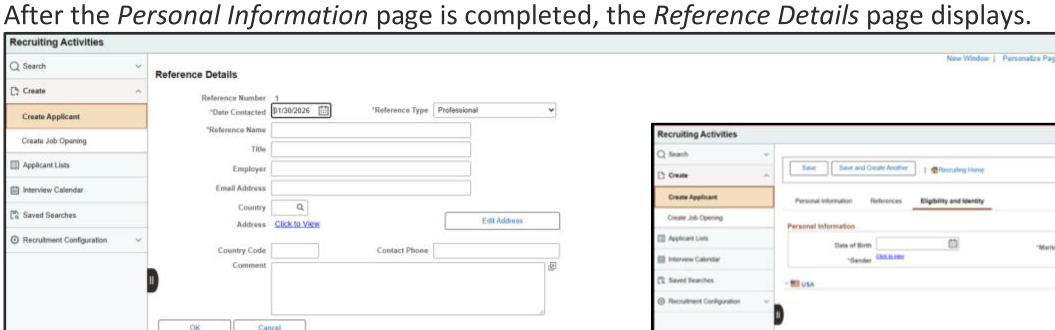
1. Select the COUNTRY value from the drop-down menu.
2. Enter the applicant's first address line in ADDRESS 1.
3. Enter the second address line of the applicant's address in ADDRESS 2.
4. Enter the applicant's third address line in ADDRESS 3.
5. Enter the CITY of the applicant's address.
6. Select the STATE value from the drop-down menu.
7. Enter the applicant's POSTAL code.
8. Enter the applicant's COUNTY (required).
9. Select **Save** to save the information and proceed to the next tab.

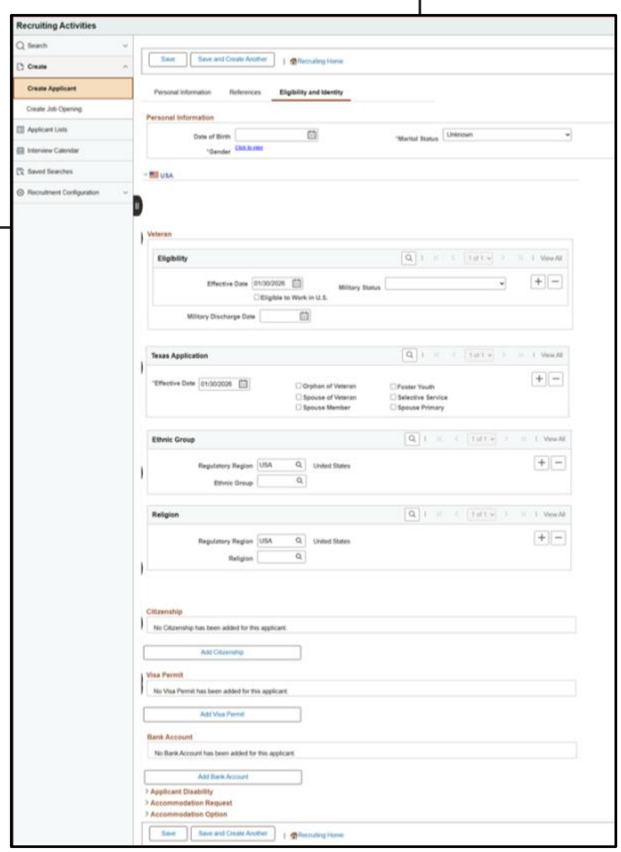
References

The *References* tab displays the *References* section. Including references is optional.



After the *Personal Information* page is completed, the *Reference Details* page displays.





To complete the *References* section:

1. Select the DATE CONTACTED using the calendar icon (required).
2. Select a REFERENCE TYPE value (*Personal*, *Professional* or *Both*) from the drop-down menu (required).
3. Enter the REFERENCE NAME (required).
4. Enter the reference's TITLE.
5. Enter the reference's EMPLOYER.
6. Enter the reference's EMAIL ADDRESS.
7. Enter the ADDRESS – this section does not display by default. Select **Click to View** to display the standard address fields, and select EDIT ADDRESS to edit the fields.
8. Enter the COUNTRY CODE.
9. Enter the CONTACT PHONE number.
10. Enter a COMMENT, if necessary.
11. Select **OK**.

Eligibility and Identity

The *Eligibility and Identity* tab encompasses the *Personal Information* section. The following sections reside within the *USA* section:

- Veteran
  - Eligibility
  - Texas Application
  - Ethnic Group
  - Religion
- Citizenship
- Visa Permit
- Bank Account
- Applicant Disability
- Accommodation Request
- Accommodation Option

Personal Information

To complete the *Personal Information* section:

1. Select the applicant's `DATE OF BIRTH` using the calendar icon.
2. Select the applicant's `MARITAL STATUS` (if provided) from the drop-down menu.
3. Indicate the applicant's `GENDER` by selecting the **Click to view** hyperlink.

Veteran

Complete the *Veteran* subsections:

Eligibility

To complete the *Eligibility* subsection:

1. Select the applicant's military service `EFFECTIVE DATE` using the calendar icon.
2. Select the applicant's `MILITARY STATUS` value from the drop-down menu.
3. Select the **Eligible to Work in U.S.** checkbox if applicable to the applicant.
4. Select the `MILITARY DISCHARGE DATE` using the calendar icon.

Texas Application

To complete the *Texas Application* subsection:

1. Select the `EFFECTIVE DATE` of the application using the calendar icon.
2. Select each of the `STATUS` values that apply from the six available statuses.

Ethnic Group

To complete the *Ethnic Group* subsection:

1. Edit (if necessary) the `REGULATORY REGION` value using the search (magnifying glass) icon. The default value is *USA*.
2. Select the `ETHNIC GROUP` value to which the applicant belongs by using the search (magnifying glass) icon.

Religion

To complete the *Religion* subsection:

1. Edit (if necessary) the `REGULATORY REGION` value using the search (magnifying glass) icon. The default value is *USA*.
2. Select the `RELIGION` value appropriate for the applicant by using the search (magnifying glass) icon.

Citizenship

Select **Add Citizenship** to enter the applicant's citizenship information.

Visa Permit

Select **Add Visa Permit** to add visa permit information for the applicant.

Bank Account

Select **Add Bank Account** to enter the applicant's bank account details.

Applicant Disability

Expand the *Applicant Disability* section to enter disability information for the applicant.

Accommodation Request

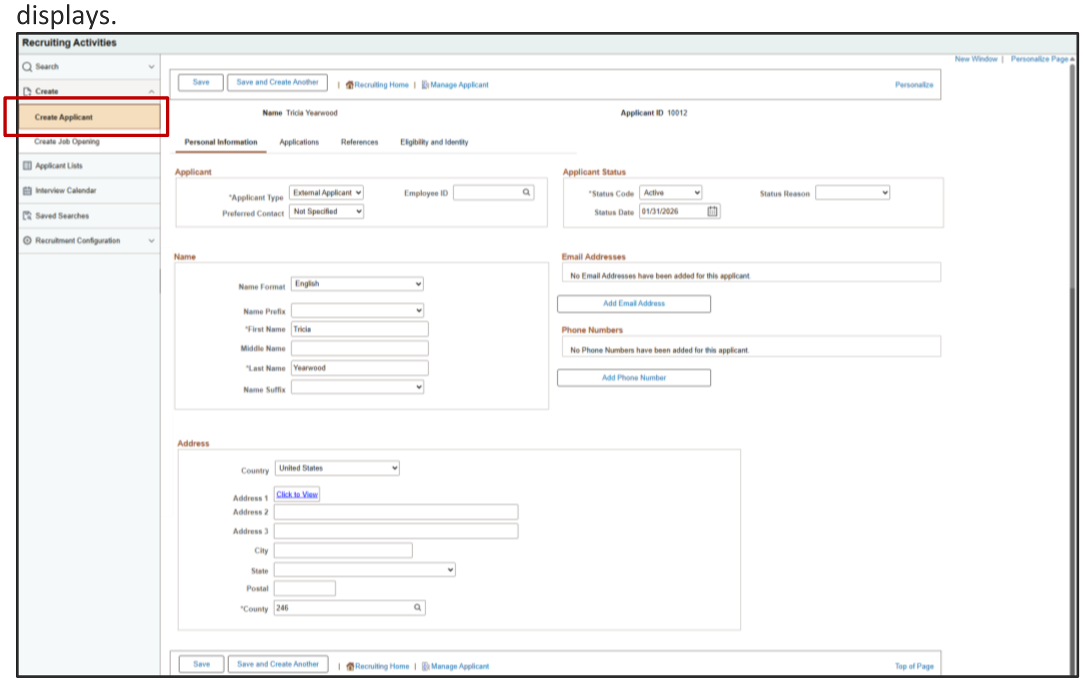
Expand the *Accommodation Request* section to enter a request for the applicant.

Accommodation Option

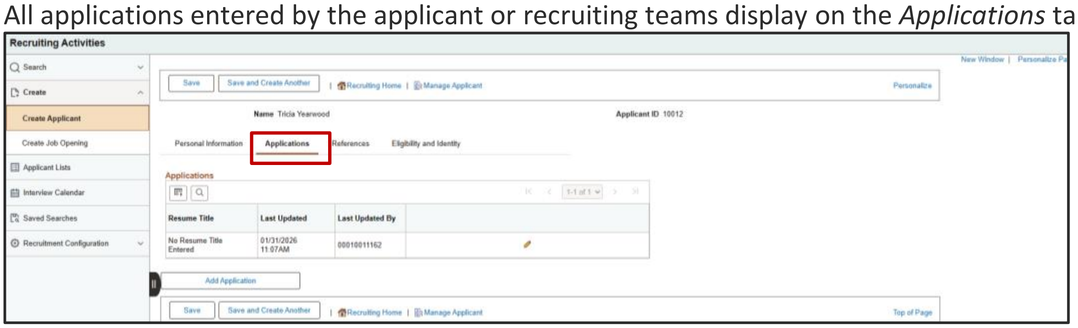
Expand the *Accommodation Option* section to access this section.

Applications

After entering and saving the applicant's information in the three previous tabs, the *Create Applicant* page displays.



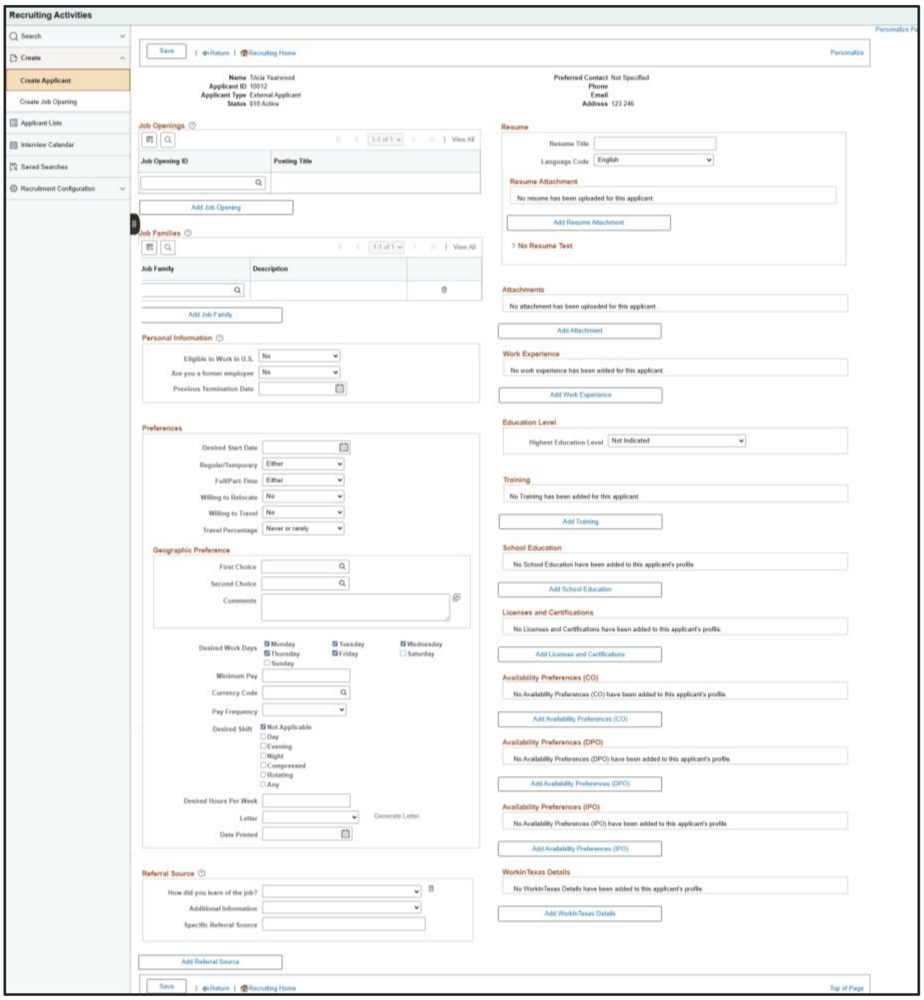
All applications entered by the applicant or recruiting teams display on the *Applications* tab and grid.



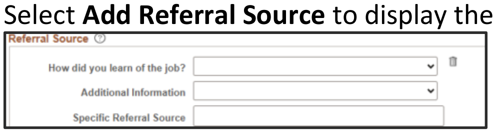
Selecting **Add Application** prompts the system to display the general application form from the general *Resume Template*.

The system defaults to `TEMPLATE ID` **5000 – CAPPS Resume Required**. Agencies may select the `TEMPLATE ID` **5004 – CAPPS Resume Optional** alternate template that includes the same information and functionality as the default template but does not require an applicant's resume. The user can select one or more job openings to which the application is assigned.

Note: This page is the same page the recruiting team views when the applicant completes the application; it is not in the guided navigation format that applicants follow but in the format presented on the *Manage Application* page.



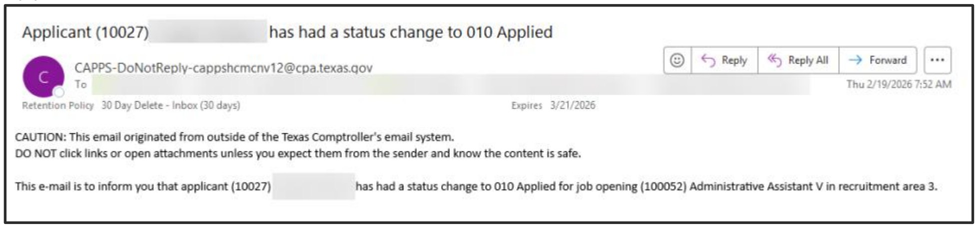
1. Select **Add Referral Source** to display the *Referral Source* section.



2. Select a value in the `HOW DID YOU LEARN OF THE JOB?` drop-down menu.
3. Select a value in the `ADDITIONAL INFORMATION` drop-down menu.
4. Enter specific information in the `SPECIFIC REFERRAL SOURCE` field, which may also expand to a subsource within the source. For example, if *Social Media* is selected, another window prompts the user to indicate the *Social Media* platform where the job was found.

Note: For more information on how to complete the application using the guided navigation that the applicant follows, review the [*Candidates – Searching and Applying for Jobs*] desk aid.

5. Select **Save**.
   When the application is created, saved and assigned to a particular job opening, the recruiter receives a notification that the application was successful and that the applicant's status is *010 Applied*.



Applicant (10027) has had a status change to 010 Applied

CAPPS-DoNotReply-cappshcmcnv12@cpa.texas.gov
To
Thu 2/19/2026 7:52 AM
Retention Policy 30 Day Delete - Inbox (30 days)   Expires 3/21/2026

CAUTION: This email originated from outside of the Texas Comptroller's email system.
DO NOT click links or open attachments unless you expect them from the sender and know the content is safe.

This e-mail is to inform you that applicant (10027) has had a status change to 010 Applied for job opening (100052) Administrative Assistant V in recruitment area 3.

   The applicant receives an email (sent to their primary email address) inviting them to apply for the specific job opening. Selecting the link in the email routes the applicant to the *CAPPS Careers* site, where they must sign into their account (or create an account) to review and complete the application.

Invitation to apply for job

To
Thu 2/19/2026 7:52 AM
Retention Policy 30 Day Delete - Inbox (30 days)   Expires 3/21/2026

CAUTION: This email originated from outside of the Texas Comptroller's email system.
DO NOT click links or open attachments unless you expect them from the sender and know the content is safe.

Dear ,

We invite you to submit job application(s) for the following job opening(s):

100052 - Administrative Assistant V

https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Ferphcmonbcnv.cpa.texas.gov%2Fpsc%2Fpshcmcnv1%2FEMPLOYEE%2FHRMS%2Fc%2FHRS_HRAM_FL.HRS_CG_SEARCH_FL.GBL%3FPage%3DHRS_CAREERS_FL%26Action%3DU%26FOCUS%3DApplicant%26SiteId%3D304&data=05%7C02%7CDouglas.Stobee%40cpa.texas.gov%7C4dc08df12cc444ae75e308de6fbe0800%7C2055feba299d4d0daa5a73b8b42fef08%7C0%7C0%7C639071059123378325%7CUnknown%7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsIlYiOiIwLjAuMDAwMCIsIlAiOiJXaW4zMiIsIkFOIjoiTWFpbCIsIldUIjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=aO818U27m4XydW%2Fi1YuD9MOx7tt0hBSh6GGPvK7bDxg%3D&reserved=0

An application has already been created on your behalf. We invite you to submit a new application for the same position to complete the job questionnaire required of all candidates for the job opening(s).

DIRECTIONS:
1. Select the above link(s) to access our careers site(s).
2. Sign In to access your account. If you are not registered before, please use this link: https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Ferphcmonbcnv.cpa.texas.gov%2Fpsc%2Fpshcmcnv1%2FEMPLOYEE%2FHRMS%2Fs%2FWEBLIB_HRS_HROI.HRS_ISCRIPT.FieldFormula.IScript_NewApplicant%3FRegCode%3D332998180916997&data=05%7C02%7CDouglas.Stobee%40cpa.texas.gov%7C4dc08df12cc444ae75e308de6fbe0800%7C2055feba299d4d0daa5a73b8b42fef08%7C0%7C0%7C639071059123401219%7CUnknown%7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsIlYiOiIwLjAuMDAwMCIsIlAiOiJXaW4zMiIsIkFOIjoiTWFpbCIsIldUIjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=A7VMpqkJWhwP2UX0bhzXjD7si6k0DVxvGMiikgH9M0U%3D&reserved=0. The same log-in credentials works for all our career site(s).
3. View your notifications.
4. In the notifications list select the 'Invitation to apply for job' link.
5. Review the job description and select the Apply button to begin your application.

Once you have logged on please proceed to your notifications and use the link called Questionnaire Completion to bring up the application. Please check and update the data contained in your application as required. Please ensure that you complete the questionnaire before submitting your application.

Thank you

This email was automatically generated. Please do not respond.

Revision History

Date	Description of Change	Changed By
July 21, 2026	Initial release.	D. Stobee