

Agent Checked Tasks

Last Modified on 09/04/2026 11:06 am EDT

When an agent checks off their own task, Pipeline flags it as agent-checked — done on the agent's end, waiting on an admin's approval.

Introduction

Agents want to say "that's done." Admins need to say "that's verified." Those are two different claims about the same task, and offices that only have one checkbox end up arguing about which one it means.

Agent-checking gives each claim its own mark. When an agent checks a task, it changes to an agent-checked state that an admin can see and act on, and the task stays open until someone with the checklist permission closes it properly. The point isn't to doubt the agent. It's that on a compliance file the record has to show who verified what, and a single checkbox can't carry both meanings.

An admin reads the list at a glance: what your agents say is finished, what your staff have confirmed, and the gap between them. Offices that don't need the second step can leave agents out of checklists entirely, and the same list works either way.

How It Works

Agent checked tasks move through a quick two-step review, carry their own checkmark, and change what each person sees along the way.

The Two-Step Checkoff

First the agent checks the task to mark it ready for review. Then an admin verifies the work and checks it off to mark it complete. A task isn't finished until that second check.

The Agent-Checked Mark

An agent-checked task shows its own checkmark, clearly different from the standard, fully-checked mark — so at a glance everyone can tell the difference between "the agent says it's done" and "an admin confirmed it's done."

What Changes for the Agent

Once an agent checks a task, it drops off that agent's *Tasks* page and stops appearing in their daily task reminder emails. The agent has done their part, so Pipeline stops nudging them about it.

What the Admin Sees

Agent-checked tasks stay on the admin's *Tasks* page and in the admin's daily reminder emails (highlighted orange), serving as a running list of what still needs approval. On the *Tasks* page, admins can filter by [Agent Checked] to review just these first.

Agent-Check a Task

Mark your task ready for admin review from the transaction's checklist.

Who Can Do This: Any agent assigned to the transaction, for tasks visible to them.

To agent-check a task:

1. Open the transaction and find the task on its checklist.
2. Click the checkbox beside the task to agent-check it.

The task now shows the agent-checked mark and moves to the admin for review. It also drops off your *Tasks* page and daily reminders.

Complete an Agent-Checked Task

Review the agent's work, then check the task off to mark it complete.

Who Can Do This: The master admin, or admins with the *Fully manage checklists and templates* permission.

To complete an agent-checked task:

1. Open the transaction and find the agent-checked task on its checklist. (You can also work from the *Tasks* page and filter by [Agent Checked].)
2. Confirm the task is truly done — for example, that the agent uploaded the right document.
3. Click the checkbox beside the task to check it off.

The checkbox fills in and the task is complete.

Remove an Agent-Check

Send a task back to the agent if it isn't ready after all.

Who Can Do This: The master admin, or admins with the *Fully manage checklists and templates* permission.

To remove an agent-check:

1. Hover over the agent-checked task on the transaction.
2. Click the red [X] that appears.

Pipeline clears the agent-check and returns the task to the agent's *Tasks* page and daily reminder emails, so they know there's more to do.

Agent Checked Tasks FAQ

An agent-checked task is done by the agent and waiting on an admin to verify and complete it. Answers to the common questions about what the mark means, why checked tasks still show for admins, and who can complete a task. See [Agent Checked Tasks FAQ](#).

Ways to Use Agent Checked Tasks

See Agent Checked Tasks at work inside a bigger job:

- [Review Your Agents' Work Before It Counts as Done](#)
-