Agent Checked Tasks

Last Modified on 11/10/2026 12:26 pm EST

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. Nothing requires both checks. An admin can check any task off directly, whether or not an agent checked it first.

How It Works

An agent's check is a signal that their part is done. It carries its own checkmark and changes what each person sees along the way.

What an Agent's Check Means

An admin checks a task off to complete it. When an agent checks one, Pipeline marks it agent-checked instead. That's how an agent says their part is done, and it puts the task in front of the admin to close out. Two checks are never required: an admin can check off any task without waiting for an agent's 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.

Frequently Asked Questions

What does an agent-checked task mean?

The agent is done and it's waiting on an admin's approval. An agent-checked task carries a special mark that's distinctly different from the standard, fully-checked completion mark — it says "the agent finished this," not "an admin confirmed it."

I'm an admin — why do I still see tasks my agent or TC already checked off?

Because an agent-check is a request for your review, not a completion. Agent-checked tasks stay on your *Tasks* page and in your daily reminders (highlighted orange) until you verify them and check them off yourself.

Do agents keep getting reminders after they agent-check a task?

No. Once an agent checks a task, it drops off that agent's *Tasks* page and stops appearing in their daily reminder emails. It stays on the admin's side until it's approved.

Can an admin undo an agent-check?

Yes. Hover over the task and click the red [X]. The agent-check is removed and the task returns to the agent's *Tasks* page and daily reminders.

Can agents mark a task fully complete?

No. Only the master admin and admins with the *Fully manage checklists and templates* permission complete tasks. Agents can only agent-check — which is why they shouldn't be given that admin-level permission.

How do I see just the agent-checked tasks?

Filter the Tasks page by [Agent Checked]. The resulting list shows the overdue and upcoming tasks agents have checked, so you can review and approve them first.