U.S. Department of State
Office of Civil Service Talent Management
Hiring Management Enterprise System
Delegated Examining (DE) Case File Checklist

Position title, series, grade(s)	Bureau/Office/Division	Announcement Number

Section 1: Items for Inclusion in Case File	
Request from Bureau / Office	**Check**
a. **Request to Recruit memo / e-mail**	
b. **Completed** recruitment package received from manager / selecting official	
c. **Copy** of Clearance from the Office of Organization and Talent Analytics (OTA), if applicable	
d. **Copy** of RPC / RPL e-mail	
e. Classified Position Description for each grade level being announced *(must match RPC/RPL request #)*	
f. Gateway to State Request for New Questions Checklist & proposed new questions spreadsheet *(Excel document)*, if applicable	
g. Job Analysis *(signed by Hiring Official)* / Crediting Plan	
h. Weights & Balance Calculator	
i. Justification for selective placement factor, if applicable	
j. Completed DS 5109 - Individual 80 Day Hiring Timeline Service Agreement	
k. Completed and signed DS 5108 - Competitive Recruitment Consultation Guide	
l. Request sent to HR Service Provider *(HRSP)*, if applicable	
All of the above documents must be included in the case file when sending to your HRSP.	

Signature of Bureau HR Specialist	Date *(mm-dd-yyyy)*

Section 2: To be Completed by HRSP or Delegated Bureau	
a. **Enter** required vacancy announcement information on DEU Control Log	
b. Announcement posted to USAJOBS	
c. Amendment(s) to vacancy announcement, if applicable - **Enter** Vacancy Tracking Item into HMES explaining what was amended.	

First Point Notification · **Refer to Corresponding with Applicant: 4 Point Notification Process**	
a. **Change** applicants status to AR	
b. **Complete** Applicant Hiring Metrics - OPM Hiring Milestones	
Second Point Notification · **Refer to Corresponding with Applicant: 4 Point Notification Process**	
a. **Change** applicants status to AA	
b. **Complete** Applicant Hiring Metrics - OPM Hiring Milestones	
c. **Reset** applicant's status	
d. Complete the eQuals Applicant Review procedures for **each** application reviewed in accordance with HMES guidance "Recording Applicant Qualifications Electronic Qualification Worksheet (eQuals)." **Note: For Professional and Scientific Positions at the GS-09 grade level and above - DO NOT prioritize 10 point CPs, except for 1102's sort by veterans preference**	
e. Based on your assessment, **select** the appropriate status code from the Status Code Listing Sheet **Note: You must enter a reason for the action in both field boxes in HMES** If there are no qualified applicants, **change** vacancy announcement status to NQA *(if applicable)*	
Third Point Notification · **Refer to Corresponding with Applicant: 4 Point Notification Process**	
Applicants Referred:	
a. **Generate** Certificate(s)	
b. **Issue** Certificate(s) of Eligibles *(send to Bureau HR Specialist; HRSP will send to Hiring Official)*	
c. **Change** the status of the BQ applicants that are being referred to R	
Applicants Not Referred:	
d. **Complete** Applicant Hiring Metrics - OPM Hiring Milestones	
e. **Change** the status of remaining BQ applicants that are "not" being referred to QNR or NR	
f. **Enter** an appropriate reason why applicant is not being referred to selecting official in both field boxes in the HMES	
g. **Complete** Applicant Hiring Metrics - OPM Hiring Milestones	
h. Instruct the hiring official to complete the CHCO Managers survey (link is provided on the certificate of eligibles). Include the confirmation page in the casefile when completed by the hiring official.	
i. **Returned copy of Certificate of Eligibles from Applicant Manager annotated with appropriate codes** - (*i.e., selections / non-selections and interviewed / not interviewed*) **(Hard copies not acceptable; Certificate must be submitted from the Hiring Official through the HMES application)**	
j. **Annotate** selection(s). Ensure selectee(s) resumes are included in the eOPF..	
k. **Certificate Audited by:** _____	

Fourth Point Notification - **Refer to Corresponding with Applicant: 4 Point Notification Process**	
Applicant(s) Not Selected:	
a. **Change** applicants status to RFNS or RNSM **Status change must be annotated on the certificate AND in the Staging Area**	
b. If no selection(s) were made, **change** vacancy announcement status to NSM	
c. **Complete** Applicant Hiring Metrics - OPM Hiring Milestones	
Applicant(s) Selected *(Tentatively)*	
a. **Change** applicant(s) status to S **Status change must be annotated on the certificate AND in the Staging Area**	
b. **Enter** "Applicant tentatively selected from Vacancy Announcement # *(put appropriate announcement)*" in both field boxes	
c. **Extend** Tentative Offer to Selectee(s)	
d. **Complete** Applicant Hiring Metrics - OPM Hiring Milestones	
e. **Send** Tentative Offer Selection Package to Selectee(s). A copy of the tentative offer letter with position, grade, step, and salary must be included in the case file.	
f. **Enter** Selectee(s) into eQIP	
g. **Notify** Applicant(s) of security clearance status	
h. **Extend** Final Offer of Employment & explain any special conditions	
i. **Complete** Applicant Hiring Metrics - OPM Hiring Milestones	
j. **Complete** New Hire Employment Offer Worksheet	
k. **Send** EOD Package or letter directing applicant to EOD website	
l. **Copy** of Selectee(s) SF-50 *(once applicant(s) EOD)* and application(s)	
m. **Change** Vacancy Announcement status code in HMES to the appropriate code *(i.e., Filled, NSM, etc.)*	
n. **Update** DEU Control Log	
o. **Include** any e-mail correspondence, notes, pertinent documents, etc. in the case file	
p. **If the vacancy announcement was cancelled a brief explanation must be included in the case file explaining why it was cancelled.**	

Signature of HR Specialist *(Audited DEU file)*	Date File Audited *(mm-dd-yyyy)*
Signature of HRSP/Delegated Bureau HR Specialist	Date *(mm-dd-yyyy)*