

Document Access Requests

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April 11, 2025

Last Updated: September 5, 2025

NOTE: We have renamed this feature from Permission Requests to Document Access Requests based on user feedback.

Document access requests are on the way! In the coming weeks, we will be rolling out a new feature that will allow users to request a specific permission level for documents. Then the owner(s) of the requested document(s) will be able to review the request and approve or deny it.

To request document access, users will be able to:

- Request a higher permission level for a single document from within the desired document
- Request a higher permission level for multiple documents at once from a document list page (e.g. All, Caseload)
- Request access to documents they don't yet have any access to from the Students / create new page

When a document access request is sent, the document owner(s) will receive a notification and can:

- Approve the requested level of access for all or some of the requested documents
- Deny the requested level of access for all of the requested documents
- Grant a different level of access to all or some of the requested documents

Additionally, with this update, document owners who have lost access to the documents they own will still be able to share the document and transfer document ownership (e.g. when a student moves to a new building that the document owner does not have access to).

This new feature will help save users and admin a lot of time when working on caseload management – especially at the beginning and end of the school year when caseloads

need to be transferred between teams and buildings.