

Transfer Documents

Transferring documents (changing the **Owner** on a document) is particularly useful at the start and end of a school year. During this time, students are often assigned new caseload managers. These caseload managers need access to previously written documents. This can be achieved by either changing the permissions on a document from the Share tab within an individual document, or following the instructions for bulk transferring multiple documents below.

Steps *To bulk transfer documents for a student:*

1. Visit a student you wish to transfer documents for.
2. On the student's **Documents** page, check the documents you wish to transfer. To check all documents, use the checkbox button on the top left of the pane.
3. Click the **Share** menu button and select **Transfer Owner**
4. Search for the staff member under **Add Owner**. Click his/her name. The user will pop into the left column of the screen, under **Owner**.
5. Click **Save**.

Tip Remember to change the permissions to **Owner** for the new caseload manager. If you are the current owner, you can also **Remove** yourself if you would like to be taken off as a collaborator. If you would like to stay on as a collaborator, but remove the student from your caseload, you can unstar the documents after you have transferred them to the new owner.