



SUBMITTABLE - Transfer Submission Ownership for Submitters

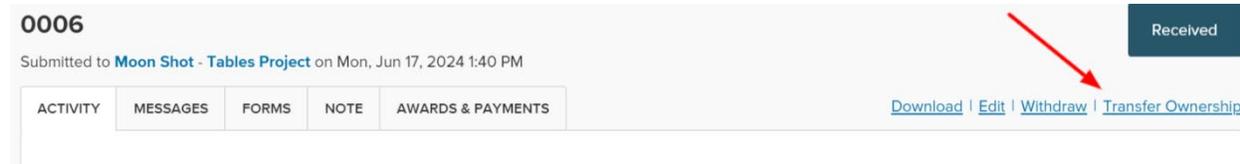
Step-by-step instructions for submitters transferring ownership of submissions.

Written by Pam English

Users can transfer submission ownership, alleviating time-consuming processes and ensuring the correct stakeholders are involved at crucial stages of a submission's lifecycle.

Transfer a Submission From Your Account

- Navigate to the **My Submissions** page.
- Open the submission to be transferred.
- Click **Transfer Ownership**:



Enter the name and email address of the new owner:

The screenshot shows a form titled 'Transfer Submission Ownership'. It includes a warning: 'The new owner will gain access to all forms, messages, and attachments associated with this submission. The previous owner will lose access once the new owner accepts ownership. Some sensitive information will be permanently concealed from the new owner after transfer.' Below this is a link 'Learn more about transfers.' The form has three input fields: 'First name *', 'Last name *', and 'Email address *'. At the bottom are two buttons: 'Cancel and Close' and 'Confirm and Transfer'.

If the new owner is new to Submittable, an account will be created for them. They'll need to request a [password reset](#) to create a password and access their new account.



If you change your mind, you can cancel the transfer:

0006 Received

Submitted to [Moon Shot - Tables Project](#) on Mon, Jun 17, 2024 1:40 PM

ACTIVITY | MESSAGES | FORMS | NOTE | AWARDS & PAYMENTS

[Download](#) | [Edit](#) | [Withdraw](#) | [Cancel Ownership Transfer](#)

The submission will remain in your account until the new owner accepts and completes the transfer.

Accept Submission from Another Account

You will receive an email alerting you to the transfer of a submission to your account.

- Navigate to the **My Submissions** page.
- Click **View transfers** on the banner:

My Submissions

Search submissions

My Submissions | **Transfers** | Drafts | Collaborations | External Submissions

i You have pending submission transfers. [View transfers](#)

Sort by: Date (most recent) | Filter: Select... | Clear Filters | Exports

STATUS	SUBMISSION	ORGANIZATION	OPPORTUNITY	DATE
Received	0004	Moon Shot	Scores Eat Oats	Jul 19, 2024

Then accept the transfer:

My Submissions

My Submissions | **Transfers** | Drafts | Collaborations | External Submissions

Incoming Transfers

Submissions another user would like to transfer to you.

ORGANIZATION	OPPORTUNITY	SUBMISSION	REQUESTED BY	TRANSFER REQUESTED
Moon Shot	Grant Application	Mission Accomplished	Matty Kerr	Jul 24, 2024 2:21 PM Accept Decline
Moon Shot	Scores Eat Oats	0004	Pam D. English	Jul 23, 2024 12:55 PM View



The submission is now in your **My Submissions** list, but you can also refer to the **Transfers** tab to see the date of the transfer and its title:

My Submissions

My Submissions	Transfers	Drafts	Collaborations	External Submissions
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Email Notifications

You will receive an email notification when:

- An organization initiates a transfer from your account to another;
- Another user initiates a transfer from their account to yours;
- The new owner accepts a transfer of submission from you.

Tracking Tools

When a transfer occurs, a **Transfers** tab will appear in your account. It will remain to show you what you've received and sent to other accounts. From this tab, you can **Accept**, **Decline**, or **Cancel** submissions.

The submissions will be sorted into your My Submissions list by date, but you can also **View** them from this tab:



My Submissions

- My Submissions
- Transfers
- Drafts
- Collaborations
- External Submissions

Incoming Transfers

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Outgoing Transfers

Submissions you have requested to transfer to another user.

ORGANIZATION	OPPORTUNITY	SUBMISSION	RECIPIENT	TRANSFER REQUESTED	
Moon Shot	Tables Project	0006	Pam 2	Jul 24, 2024 11:13 AM	Cancel Transfer

You can also see transfer information in the Activity section of the submission:

Mission Accomplished

Received

Submitted to [Moon Shot - Grant Application](#) on Wed, Jul 24, 2024 12:58 PM

ACTIVITY
MESSAGES
FORMS
NOTE
AWARDS & PAYMENTS

[Download](#) | [Edit](#) | [Withdraw](#) | [Transfer Ownership](#)

You accepted transfer from Pam English.

Mon, Jul 29, 2024 11:45 AM

Submission transfer from Pam English (pam.english@submittable.com) to Pam 2 (pam.english+2@submittable.com) created by **Pam English**

Fri, Jul 26, 2024 3:04 PM

Personal Identifiable Information (PII)

Submittable will permanently conceal these PII fields:

- Bank Details
- Fraud Prevention
- Social Security Number/ITIN
- Smart Import

New owners cannot see or edit permanently concealed fields. **Please note:** Custom fields that have been created by an organization and contain PII are not concealed.