

# Doc Review FAQ

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Checking **Reviewed** signs a doc off, clears it from the queue, and locks it against changes. Answers to the common questions about who can review, undoing a review, and reviewing in bulk.

## Who can mark a doc as reviewed?

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Anyone with the **Review docs** admin-level permission. It's granted per location on a user's profile in *Manage Users*, so you can give it to one person for one office without making them a master admin.

## Can an agent mark their own docs reviewed?

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No, not without the permission. Reviewing is an admin-level action. If a transaction coordinator or team lead needs to do it, grant them **Review docs** for that location.

## Can I review several docs at once?

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Not from inside Pipeline. The review flow is deliberately one doc at a time, so a person has actually looked at each one. For historical cleanup, email us a rule and our tech team can bulk-mark the batch.

## What changes once a doc is marked reviewed?

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It leaves the queue and locks. The agent who uploaded it can no longer rename, merge, break apart, comment on, or delete it. Deleting a reviewed doc takes a master admin or an admin with **Delete any docs in this location**.

## Can I undo a review?

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Yes. Uncheck [Reviewed] and the doc goes back in the queue. Refresh the page afterward so the doc's menu picks up the options the review had locked.

## Why can't I move a reviewed doc to another transaction?

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Reviewed docs are locked against reassignment. An admin has to unassign the doc first; it can then be assigned to the right transaction.

## Do docs created by a break apart keep the original's reviewed status?

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No — they always come back unreviewed. That's deliberate. Plenty of offices require a fresh look at pages once they've been split out, so the new docs land in the queue.

## Can we turn the review step off completely?

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Yes, a master admin can. Unchecking **Enable Reviewed Docs functionality** under Feature Settings removes the checkbox and the [Unreviewed] tab for everyone in the account.

## How do I find out who reviewed a doc and when?

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Hover the information icon to the left of the doc's name. The hover names the reviewer and the date. *Transaction History* holds the full record for every doc on the file.

## Learn More

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You sign off on a doc by checking **Reviewed** — that clears it from the queue, locks it against edits, and records who reviewed it and when.

See [Doc Review](#)

## Still Have Questions?

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Didn't find your answer above? Email us at [help@paperlesspipeline.com](mailto:help@paperlesspipeline.com) and we'll help.

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