

# APHIS eFile Organization Accounts

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## What is an Organization Account?

**Organization accounts are a new feature of APHIS eFile that allows individuals within the same organization to share and collaborate on eFile data such as applications and permits.**

Each organization will have one or more **administrator(s), who are responsible for managing the organization.** Administrators are responsible for granting access to new members, removing members, and more.

Once a user is added to an organization account (including to a specific sub-division), that user will automatically be able to view and edit applications, permits, etc. that belong to that organization account.

Administrators can also create sub-divisions within the organization, for example for different branches or research areas within your organization. **These sub-divisions allow for smaller working and sharing groups.**

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## Organization Admins vs. Members

This guide is intended primarily for **Organization Administrators (Admins)**, the users who can edit and manage their organization. The term **Member** is used to describe people within the organization managed by the Admin. Members are not able to edit and manage the organization.

Organization Admins are designated with a checkmark in the Org Admin column.

Pluto Division			Edit	More ▼
Organization Membership				
Name	Email	Org Admin		
Mobeena Sheik	✉ <a href="mailto:mobeena.sheik@accenturefederal.com">mobeena.sheik@accenturefederal.com</a>	✓		▼
RAJITA CHALLA	✉ <a href="mailto:rajita.a.challa@accenturefederal.com">rajita.a.challa@accenturefederal.com</a>			▼

If you are unable to complete some of the actions within this guide, you may not be your organization's admin.

### **ADMINS**

**As the Administrator, you will be able to :**

- Edit your organization's name and address
- Create new subdivisions within your larger organization

**As the Administrator, it will be your responsibility to:**

- Invite users to join any of your organizations
- Remove members when they leave your organization
- Coordinate the transfer of your Admin responsibilities should you leave the organization

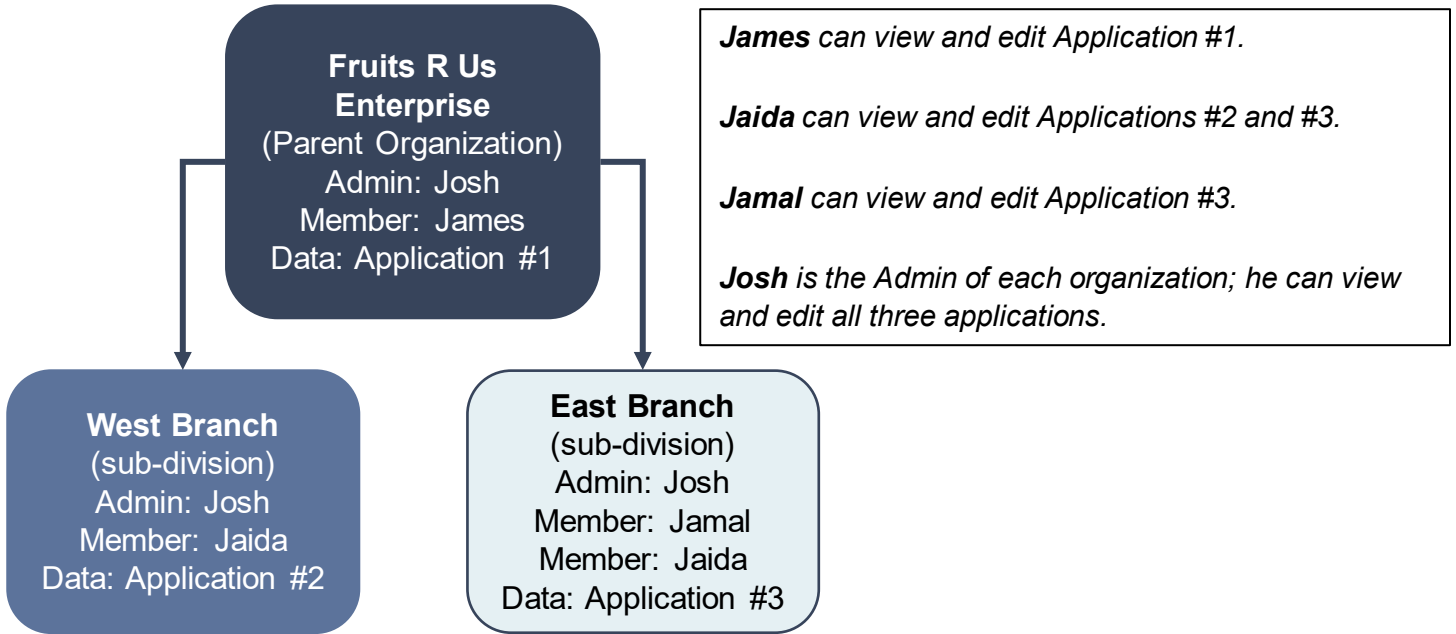
### **MEMBERS**

**As a Member, you will be able to :**

- View and share eFile data with the organization(s) you are a part of
- View other members within your organization(s)

## Organization Account Sharing

Data, or “records”, in eFile (applications, permits, etc.) are shared with organization accounts. A record can only be shared with one organization account at a time. Anyone who is in that organization account can view and edit records belonging to that organization. Users can belong to more than one organization account. The diagram below is an illustration of eFile organization account data sharing.



Because a record can only be shared with one organization account at a time, if you belong to more than one organization account, when you create a new application, you will need to indicate which organization you want to share it with.

**Sharing Organization** ✕

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You belong to more than one organization. Please choose the organization you would like to share this record with. As a reminder, other customers can only view/access data that is shared within an organization they belong to.

Sharing Organization

--None--

Cancel
Proceed

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## Organization Account Sharing

You can change the organization account your eFile data is shared with at any time from the Activity page. To do this select **Change Organization** on the activity card.

**Ref#: P-00000138 | Program: PPQ | PPQ-587**

Permit#: 587-20-223-00024 | From Testing Outcome of Processed Application

View PDF

View Details

Change Organization

Permittee	Commodity Type	Issued	Effective	Expires	Status
Sam Jones	Fruits and Vegetables	08/10/2020	08/10/2020	08/10/2023	<span style="background-color: #2e7d32; color: white; padding: 2px 5px; border-radius: 3px; font-weight: bold;">Issued</span>

**Ref#: A-00004705 | Program: PPQ | PPQ-587**

View Details

Change Organization

Applicant	Commodity Type	Started	Submitted	Status
USDA eFile Applicant3	Fruits and Vegetables	08/27/2020	08/27/2020	<span style="background-color: #2e7d32; color: white; padding: 2px 5px; border-radius: 3px; font-weight: bold;">Processed</span>

Sharing Organization

×

The activity you selected is currently shared with the organization shown below. If you would like to change the organization this activity is shared with to a different organization that you belong to, use the dropdown to select the new organization and select Proceed.

Changing the Sharing Organization will not change the contents of your activity in any way, but may change whether other customers can view/access the data, depending on whether or not they belong to the new organization.

Please note that changing the organization for this activity will not automatically change the organization for associated activities, such as permits or letters associated with an application.

Sharing Organization

PPQVS Test Account 3
▼

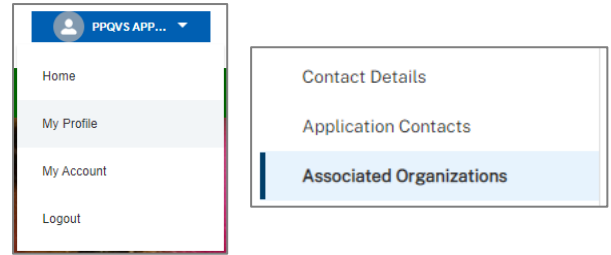
Cancel

Proceed

Please note, changing the sharing organization will not change any associated records. For example, moving an application would not move an associated permit automatically. To move any associated data, use the Change Organization button on those activity cards.

## Where to Manage Organizations

Organizations can be managed on the **Associated Organizations** page. To get to this page select the drop-down associated with your name and choose **My Profile**. Then select the Associated Organizations tab.

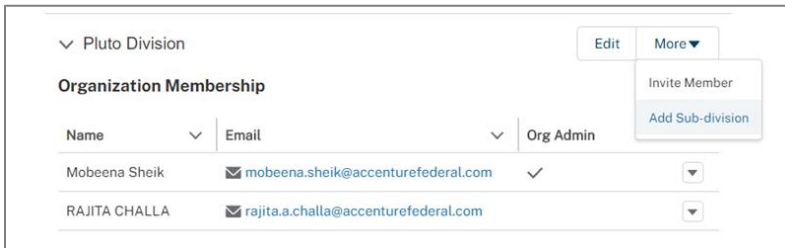


## How to Create Sub-divisions

To create a sub-division:

1. Select the More drop-down associated with the organization.
2. Choose Add Sub-division.
3. In the modal, enter the details of your new subdivision.

Only Admins can do this.



The image shows the 'Add Sub-division' form. It includes sections for 'Organization Information' (Organization Name, Doing Business As, Organization Email, Organization Phone) and 'Address Information' (Business Street, Business Country, Business City, Business State, Business Zip Code/Postal Code, Business County). A 'Save' button is at the bottom right.

## How to Invite Members

To invite a new member:

1. Select the More drop-down associated with the organization.
2. Choose Invite Member.
3. In the modal, enter the new member's information and then Send.
4. \*To accept this invitation, a user's email needs to match the email entered in the invitation.



The image shows the 'Invite member to this organization' form. It has input fields for 'Member First Name', 'Member Last Name', and 'Member Email', along with an 'Add Team Member' button and 'Cancel'/'Send Invitation' buttons at the bottom.

Only Admins can do this.

## eFile Organization Number

The eFile Organization Number is a 6-digit code eFile users can use to join your organization.

This code is created when your organization is created, and visible to only you, the organization account administrator. If you want, you can share this code with your colleagues so they can join your organization without an invitation from you.

Pluto Division			Edit	More
<b>Organization Membership</b>				
Name	Email	Org Admin		
Mobeena Sheik	mobeena.sheik@accenturefederal.com	✓		
RAJITA CHALLA	rajita.a.challa@accenturefederal.com			
Doing Business As Pluto Inc.	eFile Organization Number 294558			
Organization Type Business	Customer Number			
Organization Type (If Other)	EIN			
Att. Person	Phone (657) 571-2345			

## Change a Member to an Organization Admin

If you would like to promote a member of your organization to become an Admin:

1. Select the arrow associated with their name.
2. Select the Make Admin option.
3. They will receive an email directing them to the Org Admin attestation.

Pluto Division			Edit	More
<b>Organization Membership</b>				
Name	Email	Org		
Mobeena Sheik	mobeena.sheik@accenturefederal.com	✓		
RAJITA CHALLA	rajita.a.challa@accenturefederal.com			<ul style="list-style-type: none"> <li>Make Admin</li> <li>View Contact Details</li> <li>Revoke Access</li> </ul>

Only Admins can do this.

## Change an Organization Admin to a Member

If you do not want to be the Organization Admin anymore, you can demote yourself to Member and remain within the organization. To make an organization admin a member:

1. Select the arrow associated with their name.
2. Select Make Member.

Please note: There must always be at least one admin.

Only Admins can do this.

Pluto Division			Edit	More
<b>Organization Membership</b>				
Name	Email	Org Admin		
Mobeena Sheik	mobeena.sheik@accenturefederal.com	✓		<ul style="list-style-type: none"> <li>Make member</li> <li>Leave organization</li> </ul>
RAJITA CHALLA	rajita.a.challa@accenturefederal.com			

## Revoke Access

To revoke a member's access:

1. Select the arrow associated with their name.
2. Select Revoke Access.

Pluto Division [Edit] [More ▼]

**Organization Membership**

Name	Email	Org
Mobeena Sheik	mobeena.sheik@accenturefederal.com	▼
RAJITA CHALLA	rajita.a.challa@accenturefederal.com	

Dropdown menu for Mobeena Sheik: Make Admin, View Contact Details, Revoke Access

Only Admins can do this.

## Leave Organization

If you would like to leave an organization:

1. Select the arrow associated with your name.
2. Select Leave Organization.

Pluto Division [Edit] [More ▼]

**Organization Membership**

Name	Email	Org Admin
Mobeena Sheik	mobeena.sheik@accenturefederal.com	▼
RAJITA CHALLA	rajita.a.challa@accenturefederal.com	

Dropdown menu for Mobeena Sheik: Make member, Leave organization

Please note: There must always be at least one admin, so you cannot leave if you are the only admin. Otherwise, both admins and members are able to leave an organization.