USDA Animal and Plant Health Inspection Service
U.S. DEPARTMENT OF AGRICULTURE

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.

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
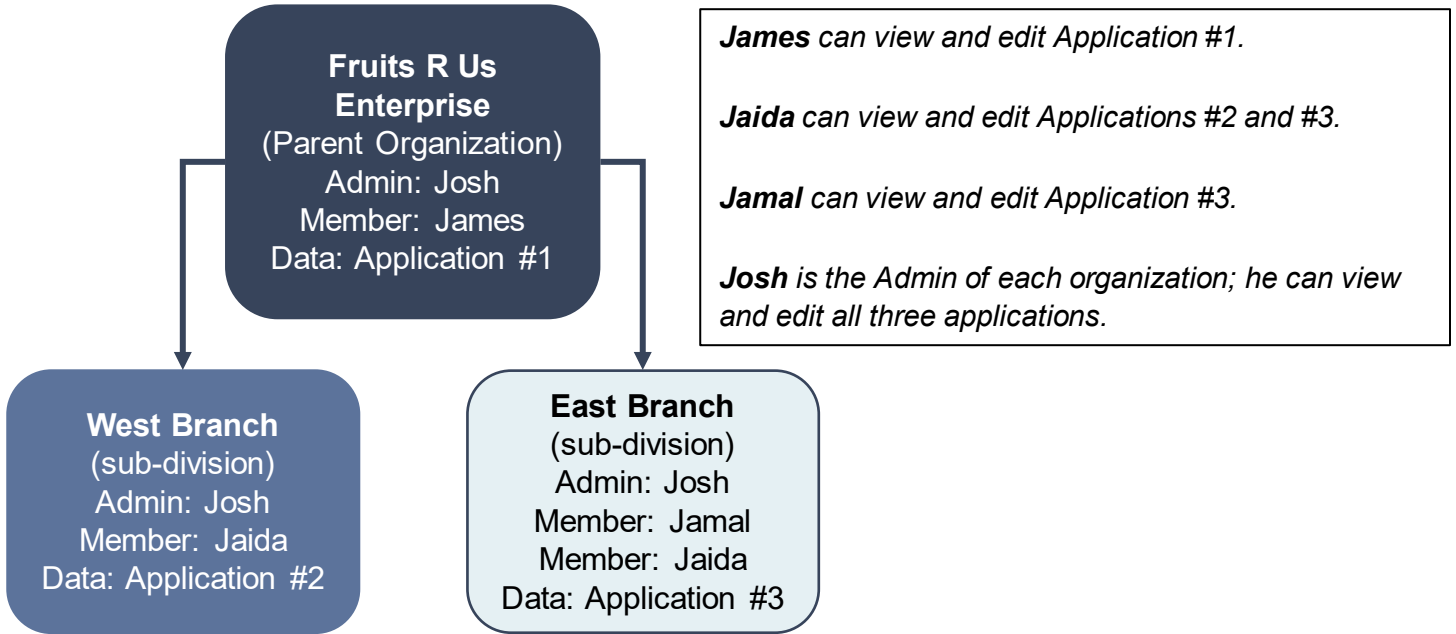
MEMBERS

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)

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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.

Fruits R Us Enterprise
(Parent Organization)
Admin: Josh
Member: James
Data: Application #1

West Branch
(sub-division)
Admin: Josh
Member: Jaida
Data: Application #2

East Branch
(sub-division)
Admin: Josh
Member: Jamal
Member: Jaida
Data: Application #3

James can view and edit Application #1.

Jaida can view and edit Applications #2 and #3.

Jamal can view and edit Application #3.

Josh is the Admin of each organization; he can view and edit all three applications.

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 ✕

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   4

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.


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.
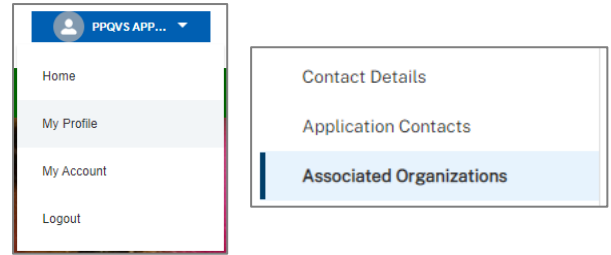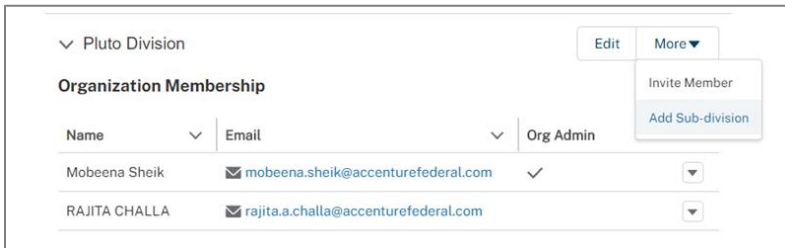

How to Create Sub-divisions

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.

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.

Only Admins can do this.

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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.

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.

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.

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Revoke Access

To revoke a member's access:

1. Select the arrow associated with their name.

2. Select 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.

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.

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