



APHIS eFile Team Sharing Accounts

TABLE OF CONTENTS

I want to learn more about...

1. [What is a Team Account.](#)
2. [Admins vs. Members.](#)
3. [eFile team account sharing.](#)
4. [Where I can manage my organization\(s\).](#)
5. [How to create a sub-division.](#)
6. [How to invite someone to my organization.](#)
7. [My eFile organization number and how to use it.](#)
8. [How to Change an Organization Member to an Admin.](#)
9. [How to Change an Organization Admin to a Member.](#)
10. [How to Revoke Access.](#)
11. [How to Leave an Organization.](#)

What is a Team Sharing Account?

Team Sharing 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 a Team Sharing Account (including to a specific sub-division), that user will automatically be able to view and edit applications, permits, etc. that belong to that account.

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



Organization Admins vs. Members

This guide is intended primarily for **Organization Administrators (Admins)**, the users who can edit and manage their team account. 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.

<div style="display: flex; justify-content: space-between; align-items: center;"> ▼ Ohio <div style="border: 1px solid #ccc; padding: 2px;"> Edit More ▼ </div> </div>	
Team Sharing Account Membership	
Name ▼	Email ▼
Org Admin	
USDAeFile Applicant 2	✉ usda.carpol.buildteam@accenturefeder... ✓ ▼
Ohio SPRO	✉ melissa.cavazos@usda.gov ▼

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

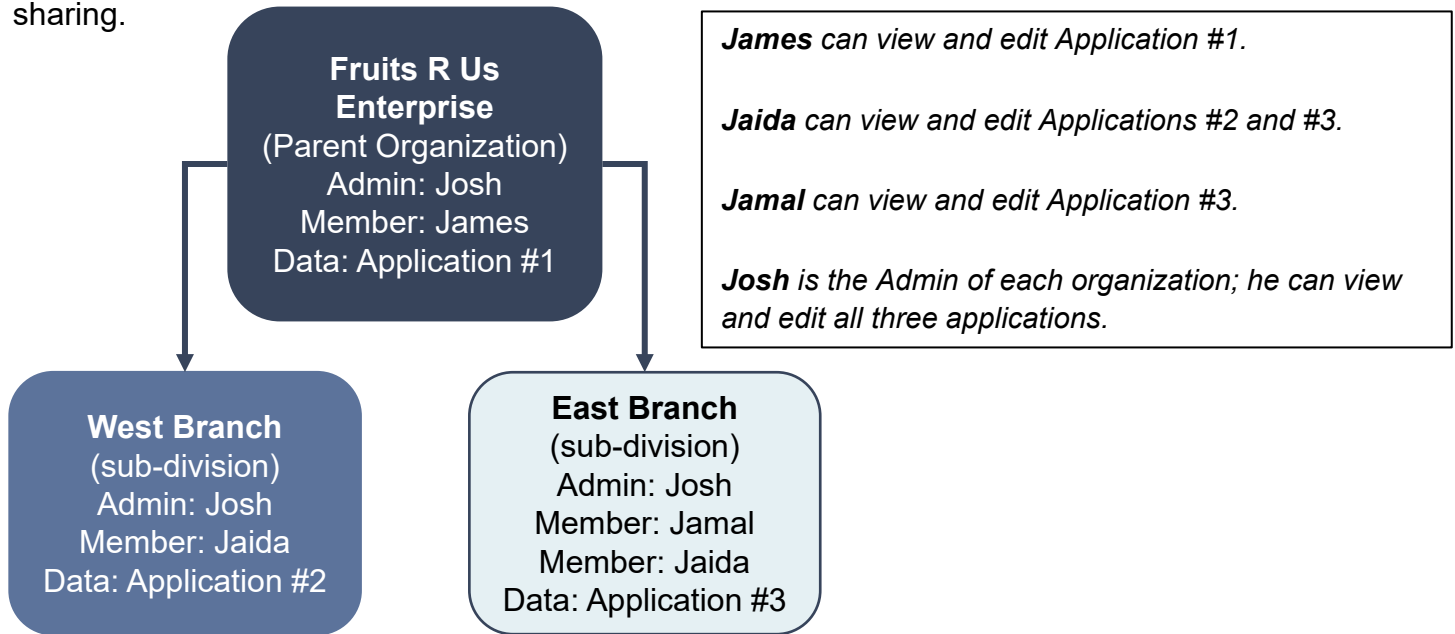
MEMBERS

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)

Team Account Sharing

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



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

Select Account

You belong to more than one account. Please choose the account (personal or Team Sharing Account) you would like to share these record(s) with. As a reminder, other customers can only view/access data that is shared to a Team Sharing Account that they are a member of.

If you do not want your application to be visible to any other customers, you can select your personal account, (which is indicated on your profile.).

Select Account

eFile Applicant Account ▼

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Team Account Sharing

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

 **Ref#: AUTH - 0000239339 | Program: BRS | BRS-Permit-Interstate Movement and Release** + New [View Details](#) [Change Account](#)
Permit#: 123-T73S9BT | Banana PPR Construct Monitoring

Permittee	Organism	Issued	Effective	Expires	Status
BRSONly PilotApplicant	Musa acuminata	07/01/2023	07/01/2023	07/01/2026	Issued

 **Ref#: AUTH - 0000239249 | Program: BRS | BRS-Permit-Interstate Movement and Release** + New [View Details](#) [Change Account](#)
Permit#: 123-PTVM2JC | Demo Banana App for User Guide

Permittee	Organism	Issued	Effective	Expires	Status
Test Carpol New	Musa acuminata	07/10/2023	07/10/2023	07/10/2026	Waiting on Customer

Select Account

The activity you selected is currently shared with the account shown below. If you would like to change the account that this activity is shared with to a Team Sharing Account that you belong to, use the dropdown to select the new account and select Proceed. If you do not want your application to be visible to any other customers, you can select your personal account (which is indicated on your profile).

Changing the Team Sharing Account 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 selected Team Sharing Account.

Please note that changing the Team Sharing Account for this activity will not automatically update the organization name associated with issued documentation (such as permits or letters, registrations, etc.).

Select Account

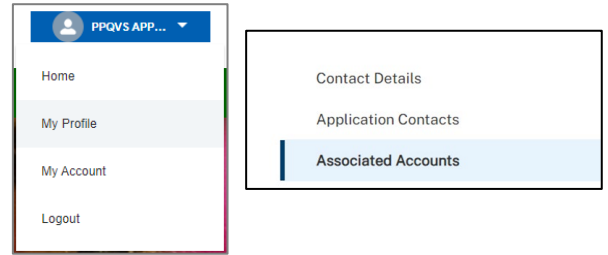
▼

Cancel
Proceed

Please note, changing the team sharing account 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 Team Sharing Account button on those activity cards.

Where to Manage Team Sharing Accounts

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

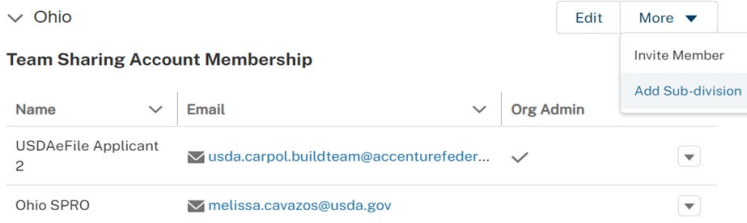


How to Create Sub-divisions

To create a sub-division:

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

Only Admins can do this.

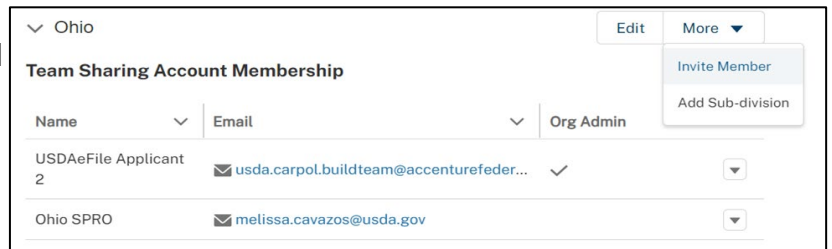


The image shows the 'Add Sub-division' modal form. It contains two sections: 'Organization Information' and 'Address Information'. The Organization Information section has fields for Organization Name, Doing Business As, Organization Email, and Organization Phone. The Address Information section has fields for Business Street, Business Country, Business City, Business State, and Business Zip Code/Postal Code. There are search icons for Business Country and Business State. A note states: 'Your business address must be a physical address, you cannot use a P.O. box.' At the bottom right are 'Cancel' and 'Save' buttons.

How to Invite Members

To invite a new member:

1. Select the More drop-down associated with the Team Sharing Account.
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(s) to this Team Sharing Account' modal form. It includes a note: 'To ensure these emails reach your team's inboxes, we recommend they add aphis.efile@usda.gov and support@salesforce.com to their address book.' Below this are three input fields: 'Member First Name', 'Member Last Name', and 'Member Email'. There is a 'Save Team Member' button next to the email field. At the bottom right are 'Cancel' and 'Send Invitation' buttons.

Only Admins can do this.

eFile Team ID Number

The eFile Team ID Number is a 6-digit code eFile users can use to join your team account. This code is created when your team account is created, and visible to only you, the team account administrator. If you want, you can share this code with your colleagues so they can join your team account without an invitation from you.

Name	Email	Org Admin
USDAeFile Applicant 2	usda.carpol.buildteam@accenturefeder...	✓
Ohio SPRO	melissa.cavazos@usda.gov	

Doing Business As: eFile Team ID Number 898769
 Organization Type: Customer Number
 Organization Type (If Other): EIN
 Att. Person: Phone 555-555-5555

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.

Name	Email	Org Admin
USDAeFile Applicant 2	usda.carpol.buildteam@accenturefeder...	✓
Ohio SPRO	melissa.cavazos@usda.gov	

Dropdown menu for 'USDAeFile Applicant 2':
 Make Admin
 View Contact Details
 Revoke Access

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.

Name	Email	Org Admin
USDAeFile Applicant 2	usda.carpol.buildteam@accenturefeder...	✓
Ohio SPRO	melissa.cavazos@usda.gov	

Dropdown menu for 'USDAeFile Applicant 2':
 Make member
 Leave Team

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.

Ohio

Team Sharing Account Membership

Name	Email	Org Admin
USDAeFile Applicant 2	usda.carpol.buildteam@accenturefeder...	✓
Ohio SPRO	melissa.cavazos@usda.gov	

Make Admin
View Contact Details
Revoke Access

Leave Team

If you would like to leave a team:

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

Ohio

Team Sharing Account Membership

Name	Email	Org Admin
USDAeFile Applicant 2	usda.carpol.buildteam@accenturefeder...	✓
Ohio SPRO	melissa.cavazos@usda.gov	

Make member
Leave Team

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 a team sharing account.