



Business Representative: Tax Information Authorization (TIA) – Revoke TIA Relationship

MyFTB allows you to **Revoke** a **Tax Information Authorization (TIA)** relationship in **MyFTB**. When a TIA relationship is revoked the representative loses the ability to view or receive confidential information from FTB regarding the business entity.

Revoking a TIA relationship does not revoke a POA relationship. The POA relationship must be revoked separately.

To revoke a TIA relationship:

- [Login to your MyFTB Business Representative account.](#)
 - If you need help with a page, select the question mark icon “?” in the upper right corner of that page.
- **Choose an option** to view a list of **all authorized TIA representatives** who have permission to obtain the business entity’s account information.
 - From the **Entity Overview** page select the business entity’s name link in the **Name** column, then select the:
 - **View Authorized Representative** link in the **Account Information** section, or
 - **Authorized Representative List** from the **Profile** dropdown menu on your **Main Navigation Menu**.
- Follow the steps below.

Steps

Step 1: View Active TIA Representatives

The **Authorized Representative List** page displays **all representatives** authorized to view this business’s account information. Depending on the relationship type, they may be authorized to act on behalf of the business. This includes your **Power of Attorney (POA)**, **Tax Information Authorization (TIA)**, and other **Business Representatives**.

The **Pending**, **Active**, and **Not Active** tabs display representatives with a relationship in that status. A representative may appear on more than one tab.

Note: The **Pending** tab is **only available** when a relationship is pending. If there are pending relationships, the **Pending** tab opens by default to indicate that you may need to take an action.

- Select the **Active** tab to view all active TIA representatives for the business entity.

Note: If the **Relationship Type** is **Multiple**, the representative has both a POA and TIA relationship with the business entity.

- Select the representative’s **name link** in the **Last Name** column for the active TIA relationship you want to revoke.

Pending	Active	Not Active	
For POA Declarations only the Primary Representative is listed.			
Show Filter			
Last Name ^	First Name ^	Relationship Type ^	Online Access ^
Case	Justin	Tax Information Authorization (TIA)	Full
Gold	Mary	Tax Information Authorization (TIA)	Limited

Step 2: View Active TIA Relationships and Available Actions

The **Authorized Representative Detail** page displays **all TIA and POA relationships** (active, pending, and inactive) the business entity has with this representative. Details such as, the relationship status and available actions for you to manage the relationship(s) are also displayed.

- In the **Tax Information Authorization (TIA) Relationships with** section, view:
 - **All TIA relationships** with this representative and the **actions available** for you to take in the **Actions** column.

Tax Information Authorization (TIA) Relationships with Mary Gold			
Status Date ^	Status ^	Expiration Date ^	Actions
05/11/2019	Active	06/11/2020	Revoke

Step 3: Revoke TIA Relationship

The **Authorized Representative Detail** page allows you to revoke an active TIA relationship.

Note: If the business entity also has a Power of Attorney (POA) relationship, you **must revoke that separately**. This **only revokes this TIA relationship** with this representative.

- Select the **Revoke** link in the **Actions** column to end this TIA relationship with the business entity's representative.

Status Date ⚙	Status ⚙	Expiration Date ⚙	Actions
05/11/2019	Active	06/11/2020	Revoke

Step 4: Confirm You Want to Revoke the TIA Relationship

Selecting **Revoke** on the **Tax Information Authorization (TIA) Relationship Detail** page ends this TIA relationship, and prevents this representative from obtaining account information from FTB for this business entity based on this relationship.

- Review the message in the **Revoke Active TIA Relationship** section.
- Select the **Revoke** button to confirm you want to end this relationship.
 - If you select **Cancel**, your request to **Revoke** the relationship will be withdrawn.



Step 5: View Updated TIA Relationship Status

The TIA relationship status is updated on the **Authorized Representative Detail** page.

- View the updated status to **Revoked-Permanent** in the **Status** column of the **Tax Information Authorization (TIA) Relationships with** section.
 - The representative **cannot obtain** the business entity's account information from FTB. They are also **prevented from establishing a new relationship** with the business.

Tax Information Authorization (TIA) Relationships with Justin Case			
Show Filter			
Status Date ⚙	Status ⚙	Expiration Date ⚙	Actions
01/28/2019	Revoked-Permanent	08/28/2019	View TIA Detail

- If you want to **allow this representative to re-establish** a TIA relationship with the business entity, select the **View TIA Detail** link in the **Actions** column.

- [Continue to Step 6.](#)

Tax Information Authorization (TIA) Relationships with Justin Case			
Show Filter			
Status Date ⌵	Status ⌵	Expiration Date ⌵	Actions
01/28/2019	Revoked-Permanent	08/28/2019	View TIA Detail

Step 6: Allow Representative to Re-Establish a TIA Relationship

The **Tax Information Authorization (TIA) Relationship Detail** page allows you to change the status of a representative from **Revoked-Permanent** to **Revoked**.

- If you **want to** allow this representative to **re-establish** a TIA relationship with the business entity, select the **Yes** button.
 - The status is updated to **Revoked** and the representative can re-establish the TIA relationship.

Revoked-Permanent TIA Relationship

Your TIA relationship with Justin Case has been revoked. Do you want Kan Jam to be able to re-establish a relationship?

- If you **do not want to** allow this representative to **re-establish** a TIA relationship with the business entity, select the **No** button.
 - The status **does not change**, it will retain the status of **Revoked-Permanent**.
Note: If you select No, the representative **will not be able to request** a new TIA relationship be established. If you want to allow the representative to establish a TIA relationship in the future, you can log in to your MyFTB account and change the status or call us, 800.852.5711.