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.

<table>
<thead>
<tr>
<th>Pending</th>
<th>Active</th>
<th>Not Active</th>
</tr>
</thead>
</table>

For POA Declarations only the Primary Representative is listed.

Show Filter

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Relationship Type</th>
<th>Online Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case</td>
<td>Justin</td>
<td>Tax Information Authorization (TIA)</td>
<td>Full</td>
</tr>
<tr>
<td>Gold</td>
<td>Mary</td>
<td>Tax Information Authorization (TIA)</td>
<td>Limited</td>
</tr>
</tbody>
</table>

**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**

<table>
<thead>
<tr>
<th>Status Date</th>
<th>Status</th>
<th>Expiration Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/11/2019</td>
<td>Active</td>
<td>06/11/2020</td>
<td>Revoke</td>
</tr>
</tbody>
</table>
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.

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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.

<table>
<thead>
<tr>
<th>Status Date</th>
<th>Status</th>
<th>Expiration Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/28/2019</td>
<td>Revoked-Permanent</td>
<td>08/28/2019</td>
<td><strong>View TIA Detail</strong></td>
</tr>
</tbody>
</table>
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

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<tbody>
<tr>
<td>01/28/2019</td>
<td>Revoked-Permanent</td>
<td>08/28/2019</td>
<td>View TIA Detail</td>
</tr>
</tbody>
</table>

**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.

- **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.