Individual: Tax Information Authorization (TIA) – Revoke TIA Relationship

MyFTB allows you to **Revoke** a TIA relationship in MyFTB. When the TIA relationship is revoked the representative can no longer receive your tax account information based on this relationship.

To revoke a TIA relationship:

- [Log in to your MyFTB Individual account.]()
  - Once you're logged into MyFTB, if you need help with the page you're on, 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 your account information.
  - From your **Taxpayer Overview** page, 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 your account information. Depending on the relationship type, they may be authorized to act on your behalf. This includes your **Power of Attorney (POA)** and **Tax Information Authorization (TIA) 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 your active TIA representatives.

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

- 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) you have 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

Show Filter

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 you also have 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 your 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 you 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** your account information from FTB. They are also **prevented from establishing a new relationship** with you.

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 you, select the **View TIA Detail** link in the **Actions** column.
    - Continue to Step 6.

Tax Information Authorization (TIA) Relationships with Justin Case

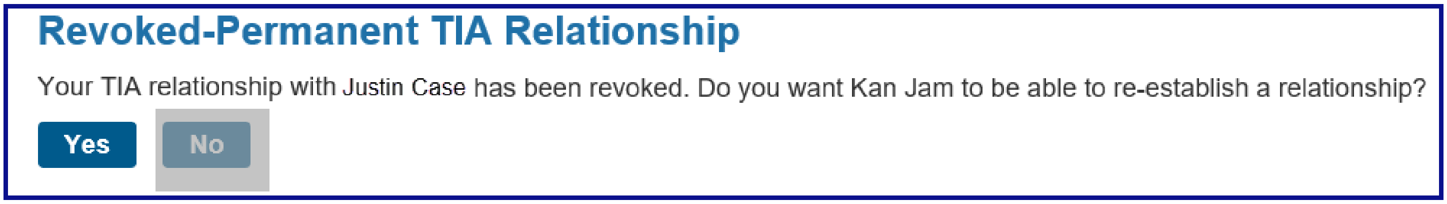
Show Filter

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 you, 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 you, 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.