



Tax Professional: Tax Information Authorization (TIA) – Add TIA Client

TIA relationships cover clients you add or renew through MyFTB or when you file form [FTB 3534, Tax Information Authorization](#).

You can add individual taxpayer and business entity clients to your **Client List**. You **must have your client's permission** to access their account online. Clients added on MyFTB or when we receive a TIA form, appear on your **Client List** with a status of "Pending" while we process your request. TIA clients remain on your **Client List** for 13 months unless you or your client terminate the relationship early.

Note: Fiduciary (Estate or Trust) and 540NR Nonresident Group Return client accounts are not available online. You can submit paper form [FTB 3534, Tax Information Authorization](#) to add these clients to your **Client List**. When approved, you can manage the TIA relationship (renew or revoke) on MyFTB.

For information about other actions related to TIA relationships, refer to:

- [Client List - Search for Client](#)
- [Power of Attorney \(POA\) Declaration - Check POA Status](#)
- [Tax Information Authorization \(TIA\) - Check TIA Status](#)
- [Tax Information Authorization \(TIA\) - Renew TIA Client](#)
- [Tax Information Authorization \(TIA\) - Revoke TIA Relationship](#)

To Add a TIA Client

- [Log in to your MyFTB Tax Professional 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.
- View your **Client List**.
 - From your **Tax Professional Overview** page select:
 - **Client List** from your **Main Navigation Menu**, or
 - The **View Client List** link in your **Quick Links** section.
- Follow the steps below.

Steps

Step 1: Add a TIA Client to Your Client List

- To add an individual taxpayer client, select the **Add Individual TIA Client** button.

Add Individual TIA Client	Add Business TIA Client	File a Power of Attorney
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- To add a business entity client, select the **Add Business TIA Client** button.

Add Individual TIA Client	Add Business TIA Client	File a Power of Attorney
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Note: You can select **Add Individual** or **Business TIA Client** from the **Services** dropdown menu on the **Main Navigation Menu** or **Quick Links** section on your **Tax Professional Overview** page.

Step 2: Enter Client Information

Note: Fields with a red asterisk (*) next to them are required fields and must be filled in to continue.

- Enter your client's information in the **Individual** or **Business Entity Client Information** section on the **Add Individual** or **Business TIA Client** page.

Note: You will need information from a previously filed CA tax return for one of the last five tax years.

➤ For an Individual client, this includes the client's:

- Last Name** and **Social Security Number**.
- Year of the Tax Return** and the **Filing Status for the Year You Choose**.
- CA AGI Shown on that Return**.

Note: If the **CA AGI is negative** on the tax return, enter the amount as a positive number and check the **Select if AGI is negative** box.

* Client's Last Name:	<input type="text"/>
* Client's Social Security Number:	<input type="text"/>
* Year of the Tax Return:	<input type="text"/> ▼
* Client's Filing Status for the Year You Chose:	<input type="text"/> ▼
* CA AGI Shown on that Return:	<input type="text"/>
	<input type="checkbox"/> Select if AGI is negative

➤ For a **Business entity**, this includes the entity's:

- **Type of Company** (Corporation, LLC, or Partnership) and **Account Number**.
- **Year of the Tax Return** and **Tax Form Type** for the Year You Choose.
- **Income**.

Note: If the **Income amount is negative** on the tax return, enter the amount as a positive number and check the **Select if Net Loss** box.

* Type of Company:	<input type="text" value=""/>
* Account Number:	<input type="text" value=""/>
* Year of the Tax Return:	<input type="text" value=""/>
* Tax Form Type for the Year You Chose:	<input type="text" value=""/>
* Income:	<input type="text" value=""/>
	<input type="checkbox"/> Select if Net Loss

Step 3: Request Your Level of Online Account Access

- To request your level of online account access to your client’s account information, select the applicable radio button (**Full** or **Limited**) in the **Online Account Access** section.
 - **Full - request or retain Full Online Account Access.** If you do not already have **Full Online Account Access**, we will mail your client an **Authorization Code** to authorize or deny your request. If your request is denied, you will retain **Limited Online Account Access**.
 - **Limited – request Limited Online Account Access** or change your online account access from **Full** to **Limited**. You will automatically be granted **Limited Online Account Access** when we approve the TIA relationship.

Be Advised: This online account access level will **apply to this TIA and all active POA relationships** you have with this client. To learn more about online account access levels, refer to [Tax Professional Online Account Access Levels](#).

* Request your level of online account access:	<input type="radio"/> Full	<input type="radio"/> Limited
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Step 4: Read and Acknowledge Statements

Step 4a:

- Read the penalty of perjury and notification statements in the **Read and check the boxes before submitting** section.
 - Check the boxes to acknowledge you read the penalty of perjury and notification statements.

<input type="checkbox"/> * Under penalties of perjury under the laws of the State of California, I acknowledge that obtaining taxpayer account information is the privilege of the taxpayer and their authorized representatives and that unauthorized access to account information is unlawful as described in California Penal Code Section 502, Revenue & Taxation Code Section 19542.1, IRC Sections 7213, 7213A and 7431 and 18 USC section 1030 and Civil Code 1798.53.
<input type="checkbox"/> * I further acknowledge that FTB will notify my client that I have access to view their account information online.

Step 4b:

- Select the **Submit** button to submit your TIA request to be processed.

Note: We will notify your client when we “approve” or “reject” your request, or if we need additional information. Inform your client to expect this notification.

<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>
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Step 5: Review Confirmation

- If the information you entered matches our records, your client will appear on your **Client List** with a status of “Pending” in the **Status** column while we process your request.

Note: To view your “Pending” TIA clients, [refer to Client List - Search for Client](#).

Important! You **cannot** access your client’s account information until we approve the relationship and notify your client.

Last Name ^	First Name ^	SSN/TIN	Relationship Type ^	Status ^	Expiration Date ^	Actions ^
Wood	Holly	XXX-XX-2222	TIA	Pending	09/08/2020	View Details

- If the information you entered does not match our records, correct the information and try again. If the information entered is correct, contact the Tax Practitioner Hotline, 916.845.7057 (open weekdays, 8 AM to 5PM).
- Select the **Return to Client List** button to return to your **Client List**.

A blue rectangular button with rounded corners and a white border, containing the text "Return to Client List" in white, bold, sans-serif font. The button is centered within a larger white rectangular area that has a blue border.

Return to Client List