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

MyFTB allows you to add an individual taxpayer or a business TIA client to your **Client List**. To add a client, you must have your client's permission and information from a recent tax return.

Note: Fiduciary (Estate or Trust) and 540NR Nonresident Group Return client account information is not available online at this time. Fiduciary (Estate or Trust) and 540NR Nonresident Group Return clients will display on your **Client List** to allow you to manage the TIA relationship (renew or revoke). You can view notices sent to these clients in the last 60 days on your **Client Notices** page.

For information about other actions you can take on your **Client List**, 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 Client to Your Client List

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

- To add a business client, select the **Add Business TIA Client** button.

Note: You can also add a client to your **Client List** when you select:

  - **Add Individual TIA Client** or **Add Business TIA Client** from the **Services** dropdown menu on your **Main Navigation Menu** from any page, or
  - The **Add Individual TIA Client** or **Add Business TIA Client** link in your **Quick Links** section on your **Tax Professional Overview** page.

Step 2: Enter Client Information

- Enter the required information about your client in the **Individual** or **Business Entity Client Information** section.

  Note: Fields with a red asterisk (*) next to them must be filled in.

  - For an **Individual taxpayer**, this includes the:
    - Taxpayer's name,
    - Social Security Number, and
    - Information from a previously filed California tax return (must be for one of the last five taxable years).
  - For a **Business entity**, this includes the:
    - Company type,
    - Account number, and
    - Information from a previously filed California tax return (must be for one of the last five taxable years).

      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" checkbox.

- In the **Online Account Access** section, request your level of online account access to your client's online account information. Select the:
  - **Full** radio button to request or retain full online account access.

    Note: Once we approve this relationship, 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** radio button for limited online account access.

    Note: You will automatically be granted limited online account access when we approve the relationship.

Note: The online account access level requested 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 MyFTB Tax Professional Online Account Access.

- In the **Read and check the boxes before submitting** section:
  - Check the boxes to acknowledge you read the penalty of perjury and notification statements.
  - Select the **Submit** button.

Step 3: Review Confirmation

- If the information you enter matches our records, the client will appear on your **Client List** with a status of "Pending" while we process your request.

  Note: You **cannot** access the client's account information until we approve the relationship. Once approved, the client will remain on your **Client List** for 13 months.

- If the information does not match our records, correct the information and try again. If the information entered is correct, contact us.
- Select the **Return to Client List** button to return to your **Client List**.

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.