Tax Professional: Full Online Account Access - Authorize (Taxpayer Provided Authorization Code)

MyFTB allows you to enter the **Authorization Code** on behalf of your client and authorize your **Full Online Account Access** request to their online account. Your client **must** provide you with the **Authorization Code** and you will be required to acknowledge that your client has authorized you to enter their **Authorization Code** on their behalf.

If you are unable to enter the **Authorization Code** on MyFTB, refer to the **Authorization Code** letter or [Tax Professional Online Account Access, How the Process Works](#) for other options.

Note: Power of Attorney (POA) and Tax Information Authorization (TIA) client relationships approved on or before June 24, 2018 were "grandfathered in" and **retain Full Online Account Access** until there is a break in the relationship (expired or revoked).

For information related to **Full Online Account Access**, refer to:

- [Full Online Account Access – Request (Opt-In)](#)

- [Power of Attorney (POA) Declaration – Submit Form 3520 (PIT or BE)](#)

- [Tax Information Authorization (TIA) – Add TIA Client](#)

To authorize your Full Online Account Access on behalf of your 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 (?) 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.
- Select the client's **Name** link on your **Client List** to access their MyFTB account.
    - ➢ For step-by-step instructions, [refer to Client List - Search for Client](#).
- Follow the instructions below.

Steps

Step 1: Authorize Your Full Online Account Access

- Select the **Enter Authorization Code** button on your client's **Taxpayer Overview** (Individual) or **Entity Overview** (Business Entity) page.

Step 2: Enter Authorization Code

Step 2a:

- Enter your client's **Authorization Code** in the **Authorization Code** box.

Step 2b:

- **Read and check the boxes** to acknowledge that you read the penalty of perjury statement and to acknowledge that your client authorized you to enter their **Authorization Code** on their behalf.

Read and check the boxes before submitting

* ☐ 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.

* ☐ I further acknowledge that my client has authorized me to enter their Authorization Code on their behalf.

Step 2c:

- Select the **Submit** button.

Note: The most recent authorization or denial will override the access level for any existing "Active" POA or TIA relationship(s) between you and your client.

Step 3: Confirmation Full Online Account Access Authorized

- If the **Authorization Code** is successfully entered, you will receive a confirmation message that states **Full online account access to your client's information has been authorized**.

> **Full Online Account Access Authorized**
> Full online account access to your client's information has been authorized.

- To view your client's online account information, select the **Continue to Client Account** button to:
  - Navigate to your Individual client's **Taxpayer Overview** page.
  - Navigate to your Business Entity client's **Entity Overview** page.

Continue to Client Account