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 MyFTB account information. 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 MyFTB Tax Professional Online Account Access 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 about how to **request 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 client) or **Entity Overview** (Business Entity client) page.

Step 2: Enter Authorization Code

- Enter your client's **Authorization Code** in the **Authorization Code** box.
- **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.
- 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 message that states **Full Online Account Access** has been authorized.
- Select the **Continue to Client Account** button to view your client's online account information.