



Tax Professional: Power of Attorney (POA) Declaration – Add or Edit an Email Address

MyFTB allows you to add or edit the email address for **all active representatives listed** on an active POA declaration.

FTB no longer mails copies of notices to representatives. **It is important to keep the email addresses current**. We notify representatives by email when there are documents available to view online for your POA clients.

Email address information added or updated will **only update** this POA declaration. It **does not update** a representative's contact information on their profile.

For information about other actions related to POA declarations, refer to:

- Power of Attorney (POA) Declaration Add Representative
- Power of Attorney (POA) Declaration Remove Representative
- Power of Attorney (POA) Declaration Revoke POA Declaration
- Power of Attorney (POA) Declaration Maintain Associates List

To add or edit a representative's email address on an active POA declaration:

- 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.
- Search for your client whose POA declaration you want to update, <u>refer to Client List</u> <u>Search for Client</u>.
- Follow the steps below.

Steps

Step 1: View POA Declaration(s)

• Select the **View Details** link in the **Actions** column of your **Client List** for the POA client whose POA declaration you to want to edit.



Step 2: Select POA Declaration to Edit or Add Email

The **Taxpayer Relationship Detail** page displays **all POA and TIA relationships** you have with this client.

To update a representative's email address on a POA declaration, select the View POA
 Detail link, in the Actions column, in the Power of Attorney (POA) Relationships with section, for the active POA declaration you want to update.

Status Date ≎	Status ≎	Declaration \$\div\$	Tax Year ≎	Expiration Date \$	Actions
12/20/2017	Active	0000000	All	12/20/2023	View POA Detail

Step 3: View List of Active Representatives Listed on POA Declaration

The **Power of Attorney Detail** page allows you to review and edit POA declaration information. Actions available depend on the status of the POA declaration. To view a list of statuses and actions available, select the question mark icon "?" in the upper right corner of this page.

• Select the **Manage Representatives** link, in the **Representative Information** section, to display the list of **all active representatives** on the POA declaration.

Manage Representatives

Step 4: Select Representative to Update Contact Information

The **POA Representative List** page includes all "active" and "pending" representatives listed on this POA declaration. You can select to update the contact information for an active representative listed.

• Select the **Edit** link in the **Action** column for the active representative whose email address information you want to update.

Note: The **Edit** link will not display for representative(s) with the status of "Pending FTB Approval".

- To add your new email address, continue to Step 5.
- To edit your email address, skip to Step 6.
- To add or edit the email address for another representative, skip to Step 7.

Primary *	Last Name 🌣	First Name ≎	ID Number ≎	Action
✓	Case	Justin	State Bar: 123456	<u>Edit</u>

Step 5: Add Your New Email Address

Step 5a:

 Select the Add New Email Address link in the Representative Email Address section of the Enter Representative Information window to add your new email address to this POA declaration.

Add New Email Address

Step 5b:

• Enter your new email address in the Email field.

Email:	
·	

Step 5c:

- Select the **Update** button.
 - > Skip to Step 8 to save the email address to this POA declaration.

Note: The new email address you entered will automatically be selected to receive notifications about this client. If you want to use a different email address to receive notifications, select the **Edit** link, continue to Step 6.



Step 6: Edit Your Email Address

- In the **Representative Email Address** section of the **Enter Representative Information** window, when:
 - One email address displays, edit the email address in the Email field for this POA declaration.



Multiple email addresses display, check the box in the **Select** column next to the email address you want to use on this POA declaration.



- Select the **Update** button.
 - > Skip to Step 8 to save the email address to this POA declaration.



Step 7: Add or Edit Email Address for Another Listed Representative

You can edit the current email address or add a new email address for another active representative listed on this POA declaration.

Step 7a:

• In the **Email** field, in the **Representative Email Address** section, of the **Enter Representative Information** window, if:

The email address is displayed, edit the email address displayed for this POA declaration by typing over the email address displayed.



➤ **No email address** is displayed in the **Email** field, enter the representative's new email address for this POA declaration.

Email:	

Step 7b:

- Select **Update** button.
 - Continue to Step 8 to save the email address to this POA declaration.



Step 8: Save Email Address Information

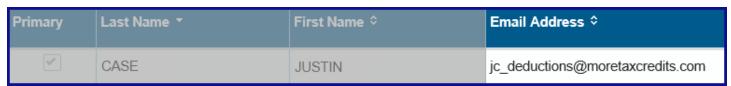
Important! Updates you made to the email address information **do not display in the table** on this page. You **must save your updates** before you can view them.

• Select **Save** button on the **POA Representative List** page to update this POA declaration with the new email address.



Step 9: View New Email Address and Exit Page

 View the new email address in the Email Address column, in the Representative Information section, on the Power of Attorney Detail page.



• To return to your **Client List** page, select **Client List** from the **Main Navigation Menu**.

Home Client List	Client Notices	Services	→ Profile →
------------------	----------------	----------	-------------

 To navigate to your Tax Professional Overview page, select Home from the Main Navigation Menu.

