



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

MyFTB allows you to add or edit the email address for each representative listed on an active POA declaration.

FTB no longer mails copies of notices to representatives so **it is important to keep the email addresses current on a POA declaration**. We notify representatives by email when there are documents available to view online for your client.

Email addresses that have been added or updated on POA declarations **does not update** the email address on any other POA declarations or update a representative's contact information on their profile.

### 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 edit, [refer to Client List – Search for Client](#).

**Note:** To find specific clients, use the filter boxes at the top of each table column of your **Client List**.
- Follow the steps below.

### Steps

#### Step 1: View POA Declaration(s)

- Select the **View Details** link in the **Actions** column of your **Client List** to view a list of POA declarations you have with this client.

## Step 2: Select POA Declaration to Update

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

- Select the **View POA Detail** link in the **Actions** column on the **Taxpayer Relationship Detail** page for the active POA declaration you want to update.

## Step 3: View Representatives Listed

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.

- Select the **Manage Representatives** link, in the **Representative Information** section, on the **Power of Attorney Detail** page to display the list of **all** active representatives on the POA declaration.

## Step 4: Select POA Declaration Representative

The **POA Representative List** page allows you to update the contact information for each representative listed on the POA declaration.

- Select the **Edit** link in the **Action** column on the **POA Representative List** page for yourself or the representative whose information you want to edit.

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

- If you want to:
  - **Add your new email address**, [continue to Step 5](#).
  - **Edit your email address**, [skip to Step 6](#).
  - **Add or edit the email address for another representative**, [skip to Step 7](#).

## Step 5: Add Your New Email Address

- 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.
- Enter your new email address in the **Email** field.
- Select the **Update** button.
  - [Skip to Step 8](#).

**Note:** The new email address you entered will automatically be selected to receive notifications about this client. If you want to select a different email address to receive notifications, select the **Edit** link again, [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.
  - Multiple email addresses display, select the **checkbox** in the **Select** column next to the email address you want to use.
- Select the **Update** button.
  - [Skip to Step 8.](#)

## Step 7: Edit Another Representative's Email Address

- Edit the email address in the **Email** field, in the **Representative Email Address** section, of the **Enter Representative Information** window.
- Select **Update** button.
  - [Continue to Step 8.](#)

## Step 8: Save Email Address Information

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

**Note:** Updates you made to the contact information do not display in the table on this page. You must save your updates before you can view them.

- View your new email address in the **Email Address** column, in the **Representative Information** section, on the **Power of Attorney Detail** page.
- To leave this page, from your **Main Navigation Menu**, select:
  - **Home** to navigate to your **Tax Professional Overview** page.
  - **Client List** to navigate to your **Client List** page to select another client, add a TIA client, or file a POA declaration.
  - **Client Notices** to navigate to your **Client Notices** page to view notices and messages your POA clients.
  - Option from the **Services** dropdown menu.
  - Option from the **Profile** dropdown menu.