



## Tax Professional: Power of Attorney (POA) Declaration – Add Representative

MyFTB allows you to add another representative to an active POA declaration. You **must** have the “**Add Representative(s)**” authorization designated on the POA declaration to add additional representatives. Any representative(s) you add will also have the same authorization to add a representative(s) to the POA declaration.

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

- [Power of Attorney \(POA\) Declaration – Check POA Status](#)
- [Power of Attorney \(POA\) Declaration – Maintain Associates List](#)
- [Power of Attorney \(POA\) Declaration – Add or Edit Representative’s Email Address](#)
- [Power of Attorney \(POA\) Declaration – Remove Representative](#)
- [Power of Attorney \(POA\) Declaration – Revoke POA Declaration](#)

### To add a representative(s) to an active Power of Attorney (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 add a representative(s) to, refer to [Client List – Search for Client](#).
- 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 want to add a representative(s) to.

Last Name ^	First Name ^	SSN/TIN	Relationship Type ^	Online Access ^	Expiration Date ^	Actions ^
Wood	Holly	XXX-XX-2222	POA	Limited	04/11/2025	<a href="#">View Details</a>

### Step 2: Select POA Declaration to Add Representative

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, in the **Power of Attorney (POA) Relationships with** section, for the active POA declaration you want to add a representative(s) to.

Status Date ^	Status ^	Declaration # ^	Tax Year ^	Expiration Date ^	Actions
12/20/2017	Active	0000000	All	12/20/2023	<a href="#">View POA Detail</a>

### Step 3: Manage Representatives

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 add a new representative(s) to this POA declaration.

# Manage Representatives

## Step 4: Choose Option to Add Representative(s)

The **POA Representative List** page includes all “active” and “pending” representatives listed on this POA declaration. If there are multiple “active” representatives, you **must** select a primary representative. To designate a representative with the status of “Pending FTB Approval” as primary, you must select them after FTB approves the representative and their status is “active”. Only one representative can be selected as the primary.

- To enter a new representative to this POA declaration, select the **Add New Representative** button.
  - [Continue to Step 5 to enter a new representative.](#)



- To add a representative to this POA declaration that you previously saved to your **Associates List**, select the **Select from Associates List** button.
  - [Skip to Step 6 to select a representative](#) from your **Associates List**.



**Note:** If the **Add New Representative** or **Select From Associates** buttons **do not display**, you **do not** have the authorization to “Add Representative(s)”. To add a representative, you **must submit a new POA declaration**.

## Step 5: Enter New Representative’s Information

Only individuals may be named as representatives. Enter all applicable information you have about the representative on the **POA Representative List** page to help us match the correct representative to your POA declaration.

**Important!** Enter the representative’s email address so we can notify them when there are documents available to view online for this client.

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

*Step 5a:*

- Enter new representative's **First**, **Middle** (optional), and **Last** name, and **Suffix** (optional) in the applicable fields in the **Representative Name** section.

**Note:** To add this representative to your **Associates List** to use on future POA declarations, refer to [Power of Attorney \(POA\) Declaration – Maintain Associates List](#).

Representative Name	
* First Name:	<input type="text"/>
Middle Name:	<input type="text"/>
* Last Name:	<input type="text"/>
Suffix:	<input type="text"/>

*Step 5b:*

- Enter new representative's ID number(s), if applicable, in the appropriate fields in the **Representative ID Numbers** section. ID numbers accepted are the CA **State Bar**, CA **CPA**, **CTEC**, **EA**, and **PTIN**.

**Note:** ID Numbers are not required.

Representative ID Numbers	
State Bar:	<input type="text"/>
CPA:	<input type="text"/>
CTEC:	<input type="text"/>
EA:	<input type="text"/>
PTIN:	<input type="text"/>

*Step 5c:*

- Enter new representative's address information in the applicable fields in the **Representative Address** section.

**Note:** Check the box to indicate if this is a **Foreign Address**.

**Representative Address**

Foreign Address

\* Address Line 1:

Address Line 2:

\* City:

\* State:  ▼

\* ZIP Code:  -

*Step 5d:*

- Enter new representative's **Phone** number, **Extension** (optional), and **Fax** number (optional), in the applicable fields in the **Representative Phone & Fax** section.

**Note:** Check the box for phone number and/or fax number to indicate if they are a **Foreign Number**.

**Representative Phone & Fax Numbers**

Foreign Phone

\* Phone:

Extension:

Foreign Fax

Fax:

*Step 5e:*

- Enter new representative's email address (optional) in the **Email Address** field in the **Representative Email Address** section.

**Note:** You **must provide the email address** for **all representatives** listed on the POA declaration to receive notification when there are documents available to view online for your POA clients.

**Representative Email Address**

FTB no longer mails a copy of client notices to POA representatives. Provide the representative's email address to receive notification when we send the client a notice.

Email:

*Step 5f:*

- Select the **Add** button to include the representative you entered on this POA declaration.
  - To add another new representative to this POA declaration, [refer to step 4](#).
  - If you do not have another representative to add to this POA declaration, [skip to Step 7](#).

**Note:** This representative will **only be added to this POA declaration**.



**Step 6: Select Associate From Your Associates List**

- Check the box in the **Select** column on the **Select from Associates List** page next to the associate you want to add to this POA declaration. You can **only add one associate** at a time.
  - If you cannot locate an associate, select the **Show Filter** link above the list to display filter boxes. If the associate is not on your **Associates List**, [refer to Power of Attorney \(POA\) Declaration – Maintain Associates List](#). To manually add a new representative(s) to this POA declaration, select the **Cancel** button and [refer to Step 4](#).

Select	Last Name ^	First Name ◇	Nickname ◇	Email Address ◇
<input checked="" type="checkbox"/>	Gold	Mary		Mgold_yourfasttax@mg.tax
<input type="checkbox"/>	Lee	Brock		Notaxingsituations@noworry.ftb

- Select the **Add** button to include the selected representative to this POA declaration.
  - To select another representative from your **Associates List** to add to this POA declaration, [refer to Step 4](#).
  - If you do not have another representative to add to this POA declaration, [continue to Step 7](#).



### Step 7: Save Changes

Only the name, ID number, and status of the representative you added to this POA declaration display in the table on the **POA Representative List** page. You **must save your updates** before you can view the contact information for the representative(s) you added.

**Pending FTB Approval** displays in the **Action** column for the new representative(s) you entered or selected from your **Associates List**. **FTB must approve the representative(s)** you added to this POA declaration. Representative(s) pending FTB approval cannot be selected as the primary until they have been approved and have a status of “active”.

- Select the **Save** button to save the representative(s) to this POA declaration.



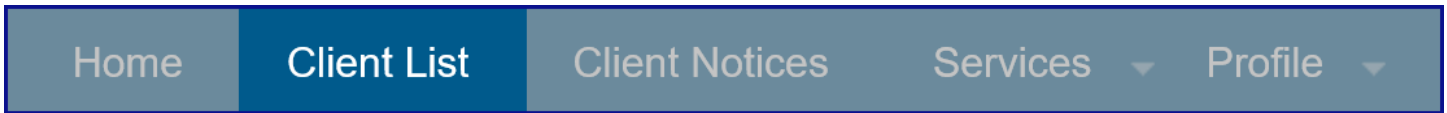
### Step 8: View Representative(s) Added and Exit Page

The **Power of Attorney (POA) Detail** page allows you to view the changes you made to the representatives listed on this POA declaration. The **Representative Information** section displays **all active representatives** listed on this POA declaration.

- View the representative(s) you added on this POA declaration in the **Representative Information** section.

Primary	Last Name ▾	First Name ⚡	Email Address ⚡
<input checked="" type="checkbox"/>	Case	Justin	Notaxingsituations@noworry.ftb
<input type="checkbox"/>	Gold	Mary	Mgold_yourfasttax@mg.tax

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



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

