



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.

Note: Your request to add a representative(s) to the POA declaration is subject to FTB’s approval.

For information about other actions you can take related to a POA declaration, 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 edit, [refer to Client List – Search for Client](#).
- Follow the steps below.

Steps

Step 1: View All POA Declarations

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

Note: To add a representative(s) from your **Associates List** to multiple POA declarations, from your **Tax Professional Overview** page, select **Update Multiple POA Declarations** in the **Quick Links** section or from the **Services** dropdown menu on your **Main Navigation Bar**.

Step 2: Select POA Declaration

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

- Select the **View POA Detail** link in the **Actions** column on the **Taxpayer Relationship Detail** page to for the specific active POA declaration you want to add a representative(s) to.

Step 3: Manage Representatives

The **Power of Attorney Detail** page displays details about the selected POA declaration. Actions available on this page are determined by the status of the POA declaration. From this page you can maintain an active POA declaration.

- Select the **Manage Representatives** link in the **Representative Information** section to add a new representative(s) to this POA declaration.

Step 4: Choose Option to Add a New Representative(s)

The **POA Representative List** page displays **all active representatives** for this POA declaration. If there are multiple representatives, you must select a primary representative.

Note: Only one representative can be selected as the primary. You cannot select a representative that is Pending FTB Approval. To designate a pending representative as the primary, you **must designate a new primary representative after FTB has approved the representative** and they have a status of Active.

- Select the **Add New Representative** button to enter a new representative to this POA declaration.
 - [Continue to Step 5.](#)
- Select the **Select from Associates List** button to add a representative to this POA declaration that you previously saved to your **Associates List**.
 - [Skip to Step 6.](#)

Note: If the **Add New Representative** or **Select From Associates** buttons **do not display**, you **do not** have the authorization to **Add Representative(s)**.

Step 5: Enter New Representative's Information

- Enter new representative's identification and contact information on the **POA Representative List** page.
- Select the **Add** button.
 - [Skip to Step 7.](#)

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

Step 6: Select Associate From Your Associates List

- Select the checkbox in the **Select** column on the **Select from Associates List** page next to the associate you want to add to the POA declaration.
 - 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 the **Add** button.

Note: You can only add one associate at a time.

Step 7: Review and Save Changes

- Review your changes in the table on the **POA Representative List** page.

Note: The status of **Pending FTB Approval** displays in the **Action** column for the new representative. FTB must approve the representative you added to this POA declaration. This representative cannot be selected as the primary while pending FTB approval.
- If the representative information you entered is correct:
 - Select the **Add New Representative** button to add another new representative.
 - [Refer to Step 5.](#)
 - Select the **Select From Associates List** button to add another representative that you previously saved to your **Associates List**.
 - [Refer to Step 6.](#)
 - Select the **Save** button if you have no additional representatives to add to this POA declaration.
 - [Continue to Step 8.](#)

- If the representative information you entered is not correct:
 - Select the **Cancel** button.

Note: All changes will be lost for this representative and you will have to enter the information again.
 - Select **Yes** in the **Cancel Edits** window.
 - You will be navigated back to the to the **Power of Attorney Detail** page. Select the **Manage Representatives** link to add the new representative again.
 - [Refer to Step 4.](#)

Step 8: View POA Declaration Changes

- View your changes in the **Representative Information** section of 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.