Tax Professional: Power of Attorney (POA) Declaration – Check POA Status

You can check the pending, active, and inactive statuses of your POA declarations.

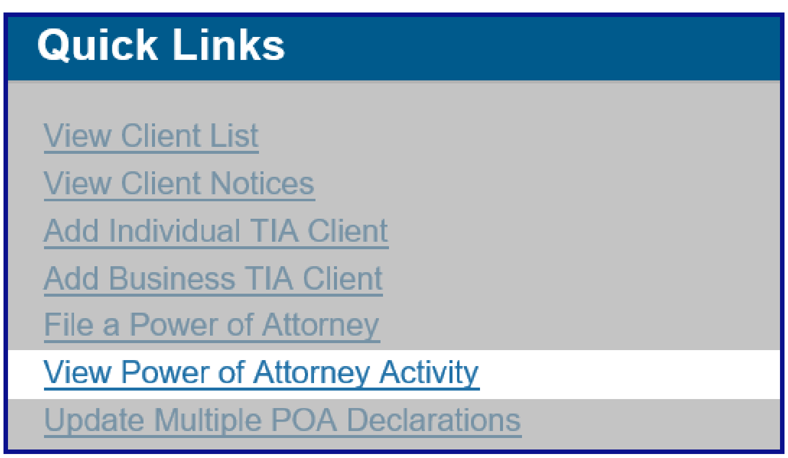
Note: You **must be listed as a representative** on the POA declaration you want to check the status of.

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

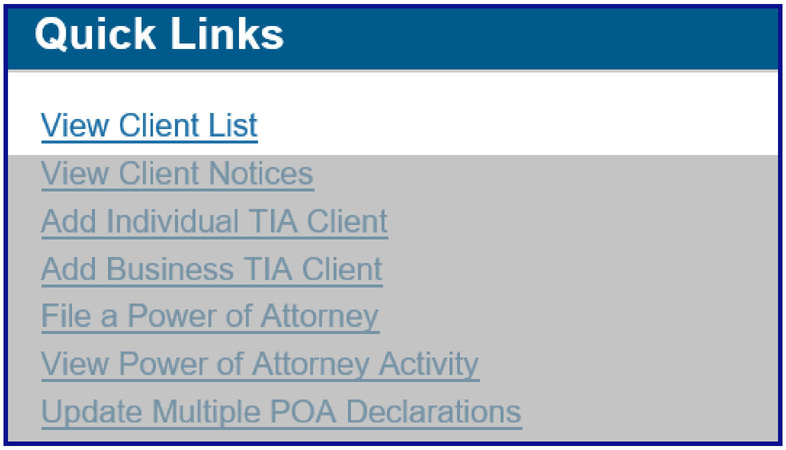
- Power of Attorney (POA) Declaration – Maintain Associates List
- Power of Attorney (POA) Declaration – Add Representative
- Power of Attorney (POA) Declaration – Remove Representative
- Power of Attorney (POA) Declaration – Revoke POA Declaration

To check the status of your POA declaration(s):

- 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.
- Choose one of the following options to check the status a POA declaration(s). From your **Tax Professional Overview** page:
  - ➢ To view recently approved or rejected POA declarations, select the **View Power of Attorney Activity** link in the **Quick Links** section.
    - ▪ Continue to Step 1 to view recently approved or rejected POA declarations.



- To check the pending, active, or inactive statuses of **all POA declarations, submitted to FTB after 10/01/2014**, select the **View Client List** link in your **Quick Links** section or **Client List** from your **Main Navigation Menu**,.
    - Skip to Step 2 to search for your POA clients.



- Follow the steps below.

Steps

Step 1: View Recently Approved or Rejected POA Declarations

The **View Power of Attorney Activity** page displays a list of **all POA declarations** recently approved or rejected by FTB that you are listed as a representative. This list displays up to 200 POA declarations since January 2018.

Note: Select the **Show Filter** link to display the filter boxes at the top of the **Date**, **Client Name**, and **Description** columns. You can use the filter boxes to help you quickly locate your client or POA declaration.

- This table displays:
    - The date the POA was approved or rejected in the **Date** column.
    - The name of your client in the **Client Name** column.
        - For **active clients**, select the **Name** link of your client to view their online account information.

    Note: Fiduciary (Estate or Trust) and 540NR Group Nonresident Return client's name will not display as a link regardless of the status. These clients' accounts are not available online. They will display on your **Client List** to allow you can manage the POA relationship online.

- The POA declaration number and status in the **Description** column.
  - If FTB approves the POA declaration, it is considered active and the status of **Activated** displays.
  - If FTB does not approve the POA declaration, it is not considered valid and the status of **Rejected** displays.

- Select the **View POA** link in the **Action** column to view the details of the POA declaration.

Date	Client Name	Description	Actions
07/18/2019	King, Joe	Rejected POA Declaration 1005305.	View POA
07/18/2019	Wood, Holly	Activated POA Declaration 1004266.	View POA

  - If you are **unable to locate** the POA declaration, refer to the "To check the status of your POA declaration(s)" section at the top of this document and search for your "Pending" POA clients on your **Client List**.
  - If you are **still unable to locate** your POA declaration(s), contact the Tax Practitioner Hotline, 916.845.7057 (open weekdays, 8 AM to 5 PM).

Step 2: Search for POA Clients on Your Client List

The **Client List** page allows you to search for active, pending, and inactive POA clients based on the status of the POA declaration. You can use the **Search Options** to search for and view different client types, relationship types, or relationship statuses.

Note: By default **all active Individual clients** display on your **Client List**.

Step 2a:

- Enter your search criteria in the **Search Options** section of your **Client List** page.
  - Select the type of client from the **Client Type** dropdown menu that you want to search for:
    - **Individual**
    - **Business**
    - **Fiduciary (Estate or Trust)**
    - **540NR Nonresident Group Return**

Client Type: Individual

- Select **POA** from the **Relationship Type** dropdown menu to search for your POA clients.

- From the **Relationship Status** dropdown menu, select the status you want to search by:
  - **Active**
  - **Pending**
  - **Inactive**

Note: The status of the POA relationship is based on the status of the POA declaration. For more information about relationship statuses, refer to the POA Declaration (Relationship) Statuses section within this document.

Step 2b:

- Select the **Search** button.
  - Continue to Step 3 to view your search results.

Step 3: Review Your Search Results

- Review your search results in the **Search Results** section of your **Client List** page for the POA client(s) whose POA declaration you want to check the status of.

Note: To find specific clients, use the filter boxes at the top of each table column.

Search Results - Individual Clients - POA - Pending

Clear Filter

Last Name	First Name	SSN/ITIN	Relationship Type	Status	Expiration Date	Actions
King	Joe	XXX-XX-1111	POA	Pending		View Details
Wood	Holly	XXX-XX-2222	POA	Pending	11/02/2024	View Details

- If you **find the client** you searched for:
    - Continue to Step 4 to view the POA relationship status.
- If you are **unable to find the client** you searched for, change your search criteria and search again.
    - Refer to Step 2 and search again.
- If you are **still unable to find the POA client(s)** you searched for, contact the Tax Practitioner Hotline, 916.845.7057.

Step 4: View Status of Your POA Relationship

- View the status of your POA relationship in the **Status** column, of your **Client List**, on your **Client List** page for the specific client(s) you searched for.

Note: The status of the POA relationship is based on the status of the POA declaration. For more information about relationship statuses, refer to the POA Declaration (Relationship) Statuses section within this document.

Last Name	First Name	SSN/ITIN	Relationship Type	Status	Expiration Date	Actions
King	Joe	XXX-XX-1111	POA	Pending		View Details

Step 5: View List of all POA Declarations with Client

- To view a list of **all POA relationship(s)** you have with this client and the actions you can take for a specific POA declaration, select the **View Details** link, in the **Actions** column, on your **Client List**, on your **Client List** page.

Last Name	First Name	SSN/ITIN	Relationship Type	Status	Expiration Date	Actions
King	Joe	XXX-XX-1111	POA	Pending		View Details

Step 6: View POA Declaration Details

The **Taxpayer Relationship Detail** page displays **all POA and TIA relationships** you have with this client and your current **Online Account Access Level** to your client's information, based on your active relationship(s).

Note: The **Online Account Access Level** section only displays if you have an active POA or TIA relationship with this client.

- In the **Power of Attorney (POA) Relationships with** section, view the POA declaration's:
  - **Status Date**
  - **Current Status**
  - **Declaration #**
  - **Tax Year(s)/Account Period(s) that are authorized**
  - **Expiration Date**
  - **Actions**

Power of Attorney (POA) Relationships with Joe King

Show Filter

Status Date	Status	Declaration #	Tax Year	Expiration Date	Actions
05/21/2018	Active	1122334	Multiple	10/06/2023	View POA Detail
05/17/2018	Active	2233446	Multiple	10/06/2023	View POA Detail

- For more information about actions you can take based on the status of the POA declaration, refer to the POA Declaration (Relationship) Statuses section within this document.
- To return to your **Client List**, select the **Back to previous page** link.

Back to previous page

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

Home | Client List | Client Notices | Services | Profile

POA Declaration (Relationship) Statuses

View POA declaration statuses and the actions you can take based on that status below.

Active Statuses:

- **Active** – You can represent this client before FTB and perform actions authorized by the POA declaration. You can access your client's MyFTB information based on your **Online Account Access Level**.
    - To view POA declaration details or end this relationship:
        - Select the **View POA Detail** link in the **Actions** column to display the POA declaration details.
        - Select the **Revoke** button on the **Power of Attorney Detail** page to end this relationship.

Pending Statuses

- **Pending** – We are processing the POA declaration.
    - Select the **View POA Details** link in the **Actions** column to display the anticipated time to process the POA declaration.
- **Pending Taxpayer Approval** – This POA declaration is pending your client's approval.
    - Advise your client to log in to their Individual MyFTB account and approve or reject the POA declaration. If they do not have a MyFTB account advise them to call us for information on how they can approve or reject the POA declaration, 800.852.5711

Inactive Statuses

- **Rejected** – The POA declaration was not approved.
    - Select the **View POA Details** link in the **Actions** column to view the rejection reason(s).
    - To establish a relationship, you **must** file a corrected new POA declaration.
- **Revoked** – The POA declaration is no longer active. You cannot access this client's information or represent them before FTB based on this POA declaration.
    - To establish a new relationship, you **must** file a new POA declaration.
- **Expired** – This POA declaration has expired. You are no longer authorized to access your client's information based on this POA declaration.
    - To establish a new relationship, you **must** file a new POA declaration.
- **Canceled** – The POA declaration never became active.
    - To establish a relationship, you **must** file a new POA declaration.