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

MyFTB allows you to check active, pending, or inactive statuses of POA declarations using a combination of search criteria or quickly view recently approved and rejected POA declarations.

For information about other actions you can take related to your **Client List** page, refer to:

- Power of Attorney (POA) Declaration – Submit Form 3520 (PIT or BE)
- Tax Information Authorization (TIA) – Add TIA Client

To check the status of a 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.
- Follow the steps below.

Steps

Step 1: Choose Option to Check POA Declaration Status

- To view recently approved or rejected POA declarations, select the **View Power of Attorney Activity** link in the **Quick Links** section of your **Tax Professional Overview** page.
  - Continue to Step 2.
- To check active, pending, or inactive statuses of:
  - All POA declarations where you are listed as a representative, 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.
      - Skip to Step 3.

Step 2. View Recently Approved or Rejected POA Declarations

The **View Power of Attorney Activity** page displays a list of POA declarations recently approved or rejected by FTB.

Note: This list displays up to 200 POA declarations.

- View the table displayed on the **View Power of Attorney Activity** page for the POA declaration(s) you want to check the status for.
- If you locate the POA declaration, the table displays the following information and available actions you can take:
  - The **Date** column displays the date the POA declaration was approved or rejected.
  - Select the **name link** in the **Client Name** column to view your client's online account information.

    Note: Fiduciary (Estate/Trust) and 540NR Group Nonresident Return client names will not display as a link regardless of status. These clients are not available online at this time.
  - The **Description** column displays the POA declaration number and status of **Activated** (approved by FTB and is Active) or **Rejected**.
  - Select the **View POA** link in the **Action** column to view the details of the POA declaration.
- If you are unable to locate the POA declaration, refer to Step 1 and use the other option.

Step 3: Search for POA Declaration(s)

The **Client List** page allows you to search for active, pending, and inactive POA clients based on the status of the POA declaration.

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

- 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**
  - Select **POA** from the **Relationship Type** dropdown menu.

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

  Note: For more information about relationship statuses, refer to the POA Declaration (Relationship) Statuses section within this document.

- Select the **Search** button.
  - Continue to Step 4.

Step 4: Review Search Results

- Review 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.

  - If you **find the client** you searched for:
    - Continue to Step 5.
  - If you are **unable to find the client** you searched for, change your search criteria and search again.
    - Refer to Step 3.
  - If you are **still unable to find your client**, contact the Tax Practitioner Hotline, 916.845.7057.

Step 5: View POA Declaration Status

- View the status of the POA declaration in the **Status** column of your **Client List** for a specific client.

Note: For more information about relationship statuses, refer to the POA Declaration (Relationship) Statuses section within this document.

Step 6: View List of all POA Declarations with Client

- Select the **View Details** link in the **Actions** column on your **Client List** 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.

Step 7: View POA Declaration Details

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

- View the:
  - **Status Date**
  - **Current Status of the POA declaration**
  - **POA declaration's Declaration #**
  - **Tax Year(s)/Account Period(s) the POA declaration is authorized**
  - **Date the POA declaration will expire**
  - **Available actions you can take on the POA declaration**

Note: For more information about POA declaration statuses, refer to the POA Declaration (Relationship) Statuses section within this document.

- Select the **Back to previous** link to return to your **Client List** page or select an option from your **Main Navigation Menu** to navigate to a different page.

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.