



## Tax Professional: Power of Attorney (POA) Declaration – Maintain Associates List

You can create and maintain a list of associates (professional individuals) that you can add as additional representatives on POA declarations. Once you add an associate, you can auto populate your new and existing POA declarations with your associates' information. The **Associates List** page allows you to view and manage these associates.

**Important!** Changes you make to your **Associates List** do not update your active POA declarations.

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

- [Power of Attorney \(POA\) Declaration – Submit Form 3520 \(PIT or BE\)](#)
- [Power of Attorney \(POA\) Declaration – Add or Edit Representative's Email Address](#)
- [Power of Attorney \(POA\) Declaration – Add Representative](#)
- [Power of Attorney \(POA\) Declaration – Remove Representative](#)
- [Power of Attorney \(POA\) Declaration – Revoke POA Declaration](#)

### To maintain your Associates List:

- [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.
- Select **Profile** from the **Main Navigation Menu** on your **Tax Professional Overview** page:
  - Select **Maintain Associates List** from the **Profile** dropdown menu.
- Follow the steps below.

## Steps

### Step 1: Choose Action to Maintain Your Associates List

All active associates display on your **Associates List**.

**Note:** To find a specific associate, select the **Show Filter** link above the table on your **Associates List** page and use the filter boxes at the top of each table column to search for your associates.

- To view additional information or add or remove an associate from multiple POA declarations, select the **Name** link in the **Last Name** column.
  - [Continue to Step 2 to view additional information or add or remove this associate](#) from multiple POA declarations.

Last Name ^	First Name ^	Nickname ^	Email Address ^	Action
<a href="#">Case</a>	Justin		Jcdeductions@morecredits.com	<a href="#">Update</a>   <a href="#">Remove</a>

- To add a new associate to your **Associates List**, select the **Add Associate** button.

**Note:** You can add up to 50 associates. If you reach the maximum number of associates allowed, you **must remove an associate** before you can add another.

  - [Skip to Step 3 to enter](#) your new associates' information.

**Add Associate**

- To modify an existing associates' contact information, select the **Update** link in the **Action** column.

**Note:** You **cannot** update previously provided name or ID numbers for your associate. To correct them, select the **Cancel** button to return to your **Associates List**. Select the **Remove** link to remove the associate from your **Associates List**, then select the **Add Associate** button to add the associate again.

  - [Skip to Step 4 to modify](#) an existing associates' contact information.

Last Name ^	First Name ^	Nickname ^	Email Address ^	Action	
<a href="#">Case</a>	Justin		Jcdeductions@morecredits.com	<a href="#">Update</a>	<a href="#">Remove</a>

- To remove an associate from your **Associates List**, select the **Remove** link in the **Action** column.

**Note:** This **only** removes the associate from your **Associates List**. To remove this associate from a single POA declaration, [refer to Power of Attorney \(POA\) Declaration – Remove Representative](#). [Skip to Step 5 to confirm](#) you want to remove this associate from your **Associates List**.

Last Name ^	First Name ^	Nickname ^	Email Address ^	Action
Case	Justin		Jcdeductions@morecredits.com	<a href="#">Update</a>   <a href="#">Remove</a>

## Step 2: View Information or Add/Remove Associate from Multiple POA Declarations

The **Associate Detail** page displays information and available actions for a specific associate.

- View name, contact, and ID number (if provided) information for your associate in the **Associate Information** window.

Associate Information	
<b>Name:</b>	Justin Case
<b>Nickname:</b>	(None provided)
<b>Business Name:</b>	(None provided)
<b>PTIN:</b>	P11111111
<b>Address:</b>	2345 Sunnidae Circle Overthere, CA 95827
<b>Phone Number:</b>	333.456.7891
<b>Fax Number:</b>	(None provided)
<b>Email Address:</b>	Jcdeductions@morecredits.com

- To return to your **Associates List** page, select the **Back to Associates List** link.

[Back to Associates List](#)

- To modify this associates' contact information, select the **Update Associate Information** button.
  - [Skip to Step 4 to modify](#) your associates' contact information.



- To add this associate to one or more active POA declarations **where you are authorized to add representatives**, select the **Add to POA Declarations** button.



- To remove this associate from one or more POA declarations where you are both representatives, select the **Remove from POA Declarations** button.

**Be Advised:** This button **only displays if you added this associate** to a POA declaration you submitted online.



### Step 3: Enter New Associates Information

You must provide the information required on the **Add Associate** page to include this person as a representative on a POA declaration.

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

#### Step 3a:

- Enter new associates **First**, **Middle** (optional), and **Last** name, **Suffix** (optional), **Nickname** (optional), and **Business Name** (optional) in the applicable fields in the **Names** section.

Names	
* First Name:	<input type="text"/>
Middle Name:	<input type="text"/>
* Last Name:	<input type="text"/>
Suffix:	<input type="text"/>
Nickname:	<input type="text"/>
Business Name:	<input type="text"/>

#### Step 3b:

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

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

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

*Step 3c:*

- Enter new associates address information in the applicable fields in the **Address** section.

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

**Address**

Foreign Address

\* Address Line 1:

Address Line 2:

\* City:

\* State:  ▼

\* ZIP Code:  -

*Step 3d:*

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

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

**Phone & Fax**

Foreign Number

\* Phone Number:

Extension:

Foreign Fax

Fax:

*Step 3e:*

- Enter new associates email address (optional) in the **Email Address** field in the **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.

Email Address \_\_\_\_\_

Email Address:

*Step 3f:*

- Select the **Add** button.
  - [Skip to Step 6 to view the confirmation message](#) the associate was saved to your **Associates List**.

**Note:** If the **Confirm Address** window displays, verify the address you entered is correct. If correct, select the **Yes** button. If incorrect, select the **No** button and update the incorrect information.



#### Step 4: Modify Associates' Contact Information

**Note:** You cannot modify your associates' name or ID number(s) you previously provided. To correct them, select the **Cancel** button to return to your **Associates List**, then select the **Remove** link in the **Actions** column to remove this associate from your **Associates List**. Select the **Add Associate** button to add this associate again to your **Associates List** and [refer to Step 3 to enter your associates' information](#).

*Step 4a:*

- Update your associates' contact information in the applicable fields in the **Address**, **Phone & Fax**, and **Email Address** sections on the **Update Associate** page.

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

<b>Address</b>	
<input type="checkbox"/> Foreign Address	
* Address Line 1:	2345 Sunnidae Circle
Address Line 2:	
* City:	Overthere
* State:	California ▼
* ZIP Code:	95827 -
<b>Phone &amp; Fax</b>	
<input type="checkbox"/> Foreign Number	
* Phone Number:	333-456-7891
Extension:	
<input type="checkbox"/> Foreign Fax	
Fax:	
<b>Email Address</b>	
Email Address:	Jcdeductions@morecredits.com

**Step 4b:**

- Select the **Update** button.
  - [Skip to Step 6 to view the confirmation message that the updates](#) you made to the associates' contact information was saved.

**Note:** If the **Confirm Address** window displays, verify the address you entered is correct. If correct, select the **Yes** button. If incorrect, select the **No** button and update the incorrect information.



**Step 5: Confirm to Remove Associate from Associates List**

- Select the **Yes** button on the **Remove Associate from Associates List** page to confirm you want to remove this associate from your **Associates List**.
  - [Continue to Step 6 to view the confirmation message](#) the associate was removed from your **Associates List**.





**Step 6: Confirmation Your Changes Saved**

- The **Changes Saved** confirmation message displays at top of the **Associates List** page.



- 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**.

