



Tax Professional: Full Online Account Access – Request (Opt-In)

MyFTB allows you to request **Full Online Account Access** to your Power of Attorney (POA) and Tax Information Authorization (TIA) client's information.

You can request **Full Online Account Access**:

- At the time you:
 - Submit form FTB 3520 (PIT or BE), Power of Attorney (POA) Declaration.
 - Add a Tax Information Authorization (TIA) Client (Individual or Business Entity).
- After the POA or TIA relationship is approved by Franchise Tax Board (FTB).

Online account access is available only for Tax Professionals.

Note: Once we approve your POA or TIA relationship, you will automatically have Limited Online Account Access. For information on what a tax professional can view and actions they can take for each access level, refer to [Online Account Access Levels](#).

Additional resource:

For information on how to request or retain Full Online Account Access at the time of submitting a POA or adding a TIA client, refer to the following How to Guides:

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

To request Full Online Account Access *after* your relationship is approved:

- [Log in to your MyFTB Tax Professional account](#).
 - Once you're logged into MyFTB, if you need help with the page that you are 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.

- Select the client’s **Name** link on your **Client List** to access their MyFTB account.
 - For step-by-step instructions, [refer to Client List – Search for Client](#).
- Follow the steps below.

Steps

Step 1: Request Full Online Account Access

After FTB approves your POA or TIA relationship, you will automatically have **Limited Online Account Access** to your client’s information and can request **Full Online Account Access** on MyFTB.

- To request **Full Online Account Access** after your POA or TIA relationship has been approved, select the **Request Full Access** button on your client’s **Taxpayer Overview** (Individual client) page or **Entity Overview** (Business Entity client) page.

Request Full Access

Step 2: Full Online Account Access Request Sent Confirmation

- View the **Full Online Account Access Request Sent** confirmation message that states:
 - “Your request for full online account access will be sent by U.S. mail to your client’s address. Please allow 7 to 10 business days for your client to receive the notice containing an Authorization Code. Inform your client to expect this notice.”

Full Online Account Access Request Sent

Notice Sent

Your request for full online account access will be sent by U.S. mail to your client’s address. Please allow 7 to 10 business days for your client to receive the notice containing an Authorization Code.

Inform your client to expect this notice.

What Happens Next

After receiving the Authorization Code, your client must take action to authorize your request.

You will be notified when your client approves or denies your request.

If your client does not take action, the Authorization Code will expire on 09/22/2019 and full online account access will not be granted.

You can monitor the status of this request on your client’s Overview.

Note: When **Full Online Account Access is requested on a POA** that lists more than one POA representative, the letter will contain a unique authorization code for each POA that **does not** have full access. An authorization code **will not** be sent for tax professional(s) with existing full online account access. This allows your client to grant each representative the desired level of access without impacting the other representatives.

- Select the **Return to Overview** button to return the **Taxpayer Overview** page for this client.



Step 3: Authorization Code Received

- After your client receives the **Authorization Code**, they **must take action** to authorize your request. [See Step 4.](#)
 - You will be notified when your client authorizes or denies your request.
 - You can monitor the status of your request on your client's **Taxpayer Overview** page.
- The **Authorization Code** will automatically expire in 30 days.
- If your client does not authorize your request for **Full Online Account Access**, you will retain your **Limited Online Account Access** to their tax information. Limited online account access includes viewing notices and most correspondence issued by FTB within the last 12 months for any tax year(s).

Step 4: Authorize or Deny Full Online Account Access (Options 1-4)

- To authorize or deny your request for **Full Online Account Access**, your client must complete one of the following options:
 - **Option 1** – Go to ftb.ca.gov/Access and enter the authorization code and their account number. Your client does not need a MyFTB account to use this option.
 - **Option 2** - Log in to their online **MyFTB** account at ftb.ca.gov to authorize this request.
 - Your client **does not need an Authorization Code** when they authorize or deny your request through their MyFTB account.

- If your client has a MyFTB account and has set their preferences to receive email and/or text notification, they will immediately receive the **Authorization Code** electronically.
- **Option 3** - Give the authorization code to you, their representative, to complete the authorization process. For step-by-step instructions, refer to [Full Online Account Access – Authorize \(Taxpayer Provided Authorization Code\)](#).
- **Option 4** - Call FTB and use our Interactive Voice Response system or speak to a customer service agent.

Important Information:

- If your client **authorizes** your request for **Full Online Account Access**:
 - You will immediately be granted **Full** access to the client’s MyFTB account information.
 - The authorization will **apply to all existing POA and TIA relationships** that you have with this client.
- If your client **denies** your request for **Full Online Account Access**:
 - Your POA or TIA relationship with your client will not be revoked.
 - You will continue to have limited online account access and can obtain additional information by calling the Franchise Tax Board.
 - The denial **applies to all existing POA and TIA relationships** that you have with this client.
- If your client **denies** your **existing Full Online Account Access**, your online access level will change from Full to Limited.