STATE OF CALIFORNIA
Franchise Tax Board

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 online account:

- 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 FTB.

Online account access is **only available** for Tax Professionals. You **must request Full Online Account Access on MyFTB after** FTB approves your POA or TIA relationship. For more information about **Full and Limited Online Account Access**, refer to Online Account Access Levels.

Note: You will automatically have **Limited Online Account Access** when we approve your POA or TIA relationship.

For information about how to **request or retain Full Online Account Access at the time of submission**, refer to:

- 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 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.
- 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 account information and can request **Full Online Account Access** on MyFTB. Your client does not need to have a MyFTB Individual account for you to request **Full Online Account Access**.

- 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) 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.
    - ➢ We will mail your client a letter that includes an **Authorization Code** to authorize or deny your request. Inform your client to expect this notice.

      Note: Please allow 7 to 10 business days for your client to receive the letter containing the **Authorization Code**.

> **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.

- 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.
  - ➢ You will be notified when you 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, **Full Online Account Access** will not be granted and all representatives listed on the POA declaration will retain* **Limited Online Account Access**.

  Note: If the **Authorization Code** expires before your client authorizes your request and you already have **Full Online Account Access** based on an existing POA or TIA relationship with this client, there will be no change to your current access level.

Step 4: Options to Authorize or Deny Full Online Account Access

There are several options available for your client to authorize or deny your request for **Full Online Account Access**.

- To authorize or deny your request for **Full Online Account Access**, your client can:
  - ➢ If they have a MyFTB account, log in to their (Individual or Business Representative) MyFTB account immediately after you make the 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.
  - ➢ Call FTB and use the Interactive Voice Response (IVR) system or speak to a customer service representative.
  - ➢ Use the online service on the FTB website.

    - Provide you with the **Authorization Code** to authorize or deny your **Full Online Account Access** request on their behalf, for step-by-step instructions, refer to Full Online Account Access – Authorize (Taxpayer Provided Authorization Code).

Step 5: Full Online Account Accessed Authorized or Denied

- If your client **authorizes** your request for **Full Online Account Access**:
    - **You and all representatives listed** will immediately be granted **Full** access to the client's account information.
    - The authorization will **apply to all existing POA and TIA relationships** that **you and all representatives listed** have with this client.
- If your client **denies** your request for **Full Online Account Access**:
    - **You and all representatives listed:**
        - Will **retain Limited Online Account Access**.
        - The denial will **apply to all existing POA and TIA relationships** that **you and all representatives listed** have with this client.
        - That already have **Full Online Account Access** based on an existing POA or TIA relationship with this client, will have their **online access level changed from Full to Limited**.