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

MyFTB allows you to request **Full Online Account Access** to your client's MyFTB account information:

- 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.

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)
- Power of Attorney (POA) Declaration – Check POA Status
- Tax Information Authorization (TIA) – Add TIA Client
- Tax Information Authorization (TIA) – Check TIA Status

To request Full Online Account Access *after* the 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

- Select the **Request Full Access** button on your client's **Taxpayer Overview** (Individual client) or **Entity Overview** (Business Entity client) page.

Note: We will mail your client a notice that includes the **Authorization Code** to authorize or deny your request for **Full Online Account Access**. Advise your client to expect this notice.

Step 2: Authorize or Deny Full Online Account Access

- If your client has a MyFTB account, when you request **Full Online Account Access** they can immediately:
    - Log in to their (Individual or Business Representative) MyFTB account.
    - Authorize or deny your request.

  Note: 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.
- Your client has the option to 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).