STATE OF CALIFORNIA
Franchise Tax Board

MyFTB

# Tax Professional: Tax Information Authorization (TIA) – Check TIA Status

You can check the active, pending, or inactive status of your TIA request(s) using a combination of search criteria. TIA relationships expire 13 months from the date the taxpayer signed form FTB 3534, Tax Information Authorization or the date you added the taxpayer as a client in MyFTB, unless you or your client terminate the relationship before it expires.

For information about other actions related to TIA relationships, refer to:

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

## To check the status of a TIA request:

- 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** page.
  - 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.
- Follow the steps below.

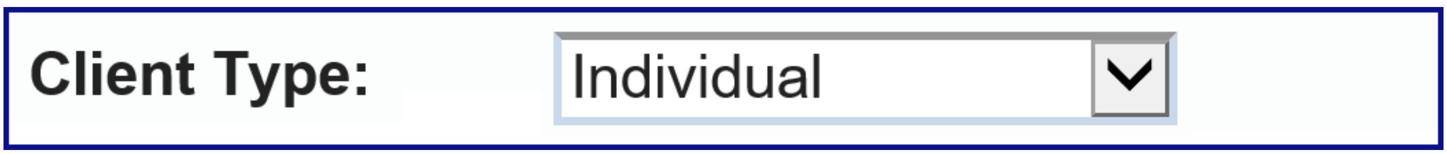
## Steps

### Step 1: Search for Your TIA Client(s) by Status

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

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

- In the **Search Options** section of your **Client List** page:
  - Select the type of client from the **Client Type** dropdown menu:
    - **Individual**
    - **Business**
    - **Fiduciary (Estate or Trust)**
    - **540NR Nonresident Group Return**




  - Select **TIA** 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 TIA Request (Relationship) Statuses section within this document.

- Select the **Search** button.


## Step 2: Review Your Search Results

- Review your results in the **Search Results** section of your **Client List** page for the TIA client(s) whose TIA request you want to check the status of.

  **Note**: To find a specific client(s), use the filter boxes at the top of each table column.

  - If you **find the TIA client(s)** you searched for:
    - Continue to Step 3 to view the status of your TIA request.
  - If you are **unable to find the TIA client(s)** you searched for, change your search criteria and search again.
    - Refer to Step 1 to search for your TIA client(s) again.
  - If you are **still unable to find the TIA client(s)** you searched for, contact the Tax Practitioner Hotline, 916.845.7057.

**Search Results - Individual Clients - TIA - Pending**

Clear Filter

| Last Name | First Name | SSN/ITIN | Relationship Type | Status | Expiration Date | Actions |
|---|---|---|---|---|---|---|
| King | Joe | XXX-XX-1111 | TIA | Pending | 08/18/2020 | View Details |
| Wood | Holly | XXX-XX-2222 | TIA | Pending | 09/08/2020 | View Details |

## Step 3: View Status of Your TIA Request

- View the status of your TIA request in the **Status** column, of your **Client List,** on your **Client List page**, for the specific TIA client(s) you searched for.

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

| Last Name | First Name | SSN/ITIN | Relationship Type | Status | Expiration Date | Actions |
|---|---|---|---|---|---|---|
| King | Joe | XXX-XX-1111 | TIA | Pending | 08/18/2020 | View Details |
| Wood | Holly | XXX-XX-2222 | TIA | Pending | 09/08/2020 | View Details |

## Step 4: View List of all TIA Relationships with Client

- To view a list of **all TIA relationship(s)** you have with this client and the actions you can take for a specific TIA relationship, select the **View Details** link, in the **Actions** column, on your **Client List**, on your **Client List** page.

| Last Name | First Name | SSN/ITIN | Relationship Type | Status | Expiration Date | Actions |
|---|---|---|---|---|---|---|
| King | Joe | XXX-XX-1111 | TIA | Pending | 08/18/2020 | View Details |
| Wood | Holly | XXX-XX-2222 | TIA | Pending | 09/08/2020 | View Details |

## Step 5: View TIA Relationship Details

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

**Note**: The **Online Account Access Level** section only displays if you have an active POA or TIA relationship with this client.

- In the **Tax Information Authorization (TIA) Relationships with** section, view the TIA relationship's:
  - **Status Date**
  - **Status**
  - **Expiration Date**
  - **Actions**

  **Note**: For more information about the actions you can take based on the status of the TIA relationship, refer to the TIA Request (Relationship) Statuses section within this document.

**Tax Information Authorization (TIA) Relationships with Holly Wood**

Show Filter

| Status Date | Status | Expiration Date | Actions |
|---|---|---|---|
| 01/10/2018 | Pending | 02/10/2019 | View TIA Detail |

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

Back to previous page

- To navigate to your **Tax Professional Overview** page, select **Home** from the **Main Navigation Menu**.


## TIA Request (Relationship) Statuses

View your TIA relationship(s) status and the actions you can take based on that status below.

**Active Status:**

- **Active** – You can obtain information on all tax years or account periods by contacting FTB. You can access your client's MyFTB information based on your **Online Account Access Level**. You cannot represent them before FTB or take actions on their behalf without an active POA relationship.
  - Select the **Revoke** link on the **Taxpayer Relationship Detail** page to end this relationship.

**Pending Status:**

- **Pending** – We are processing the TIA request.
  - Select the **View TIA Detail** link in the **Actions** column to display the anticipated time to process the TIA request.

**Inactive Statuses:**

- **Rejected** – The TIA request was not approved.
  - Select the **View TIA Details** link in the **Actions** column to view the rejection reason(s).
  - To establish a new relationship you must either:
    - Add your client again in MyFTB.
    - Submit a new, taxpayer-signed form FTB 3534, Tax Information Authorization.
- **Revoked** – You or your client ended this relationship. The TIA relationship is no longer active. You cannot access this client's information based on this TIA relationship.
  - To establish a new TIA relationship you must either:
    - Add your client again in MyFTB.
    - Submit a new, taxpayer-signed form FTB 3534, Tax Information Authorization.

- **Revoked-Permanent** – You or your client permanently ended this relationship. The TIA relationship is no longer active. You cannot access this client's information based on this TIA relationship. You cannot establish a new TIA relationship with this client.
    - If you believe this status was set in error, your client **must** contact us to update this status, 800.852.5711.
- **Expired** – TIA relationships expire 13 months from the date they are established. The TIA relationship was not renewed prior to the expiration date and it has expired.
    - To establish a new TIA relationship you must either:
        - Add your client again in MyFTB.
        - Submit a new, taxpayer-signed form FTB 3534, Tax Information Authorization.
- **Canceled** – The TIA relationship never became active.
    - To establish a new TIA relationship you must either:
        - Add your client again in MyFTB.
        - Submit a new, taxpayer-signed form FTB 3534, Tax Information Authorization.