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

MyFTB allows you to check the active, pending, or inactive status of TIA requests using a combination of search criteria.

For information about other actions you can take related to your **Client List** page, refer to:

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

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.
- 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: Check TIA Request Status

- To check active, pending, or inactive statuses of:
  - All POA declarations where you are listed as a representative, 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.

Step 2: Search for TIA Request(s)

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 individual clients display on your **Client List**.

- Enter your search criteria in the **Search Options** section of your **Client List** page.
    - Select the type of client from the **Client Type** dropdown menu that you want to search for:
        - **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 3: Review Search Results

- Review 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 specific clients, use the filter boxes at the top of each table column.
    - If you **find the client** you searched for:
        - Continue to Step 4.
    - If you are **unable to find the client** you searched for, change your search criteria and search again.
        - Refer to Step 2.
    - If you are **still unable to find your client**, contact the Tax Practitioner Hotline, 916.845.7057.

Step 4: View TIA Request Status

- View the status of the TIA request in the **Status** column of your **Client List** for a specific client.

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

Step 5: View List of all TIA Relationships with Client

- Select the **View Details** link in the **Actions** column on your **Client List** 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.

Step 6: View POA Declaration Details

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

- View the:
    - **Status Date**
    - **Current Status of the TIA request**
    - **Date the TIA relationship will expire**
    - **Available actions you can take on the TIA relationship**

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

- Select the **Back to previous** link to return to your **Client List** page or select an option from your **Main Navigation Menu** to navigate to a different page.

TIA Request (Relationship) Statuses

View TIA request statuses and the actions you can take based on that status below.

Active Statuses:

- **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 **Power of Attorney Detail** page to end this relationship.

Pending Statuses

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

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** – The TIA relationship is no longer active. You cannot access this client's information based on this TIA relationship.
    - 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-Permanent** – The TIA relationship is no longer active. You cannot access this client's information based on this TIA relationship. Nor can you establish a new TIA relationship with this client.
    - If you believe this status was set in error, your client **must** contact us to update the status, 800.852.5711.
- **Expired** – You had access to this client's information for 13 months. However, this access has ended.
    - 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.
- **Canceled** – The TIA relationship never became active.
    - 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.