Tax Professional: Tax Information Authorization (TIA) – Renew TIA Client

MyFTB allows you to renew TIA clients before the expiration date to ensure an uninterrupted relationship. You may renew a TIA client relationship if more than 10 business days remain before the expiration date **and** more than 90 days have passed since you added or renewed your TIA client.

When you renew a client, your current relationship remains active while we process your request. Once your request is processed (approved or rejected), your client is notified. We recommend you inform your client to expect this notification.

Note: You **must** have your client's permission to renew your relationship and access their account information through MyFTB.

For information about other actions related to your TIA clients, refer to:

- Client List – Search for Client
- Tax Information Authorization (TIA) – Add TIA Client
- Tax Information Authorization (TIA) – Check TIA Status
- Tax Information Authorization (TIA) – Revoke TIA Relationship

To renew a Tax Information Authorization (TIA) client on your Client List:

- 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 (?) 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.
- Follow the instructions below.

Steps

Step 1: Renew TIA Client Relationship

- Select the **Renew** link in the **Actions** column of your **Client List** for the TIA client relationship you want to renew.

Note: If you do not renew the relationship within the specified timeframe, the **Renew** link will not display. If less than 10 business days remain before the expiration date, you **do not** have the option to renew the relationship and **must** add your client again.

Step 2: Submit Renew TIA Relationship Request

- Read all information in the **Read and check the boxes before submitting** section.
- Check the boxes to:
  - Acknowledge the penalty of perjury statement.
  - Affirm you have permission to renew the TIA relationship.
  - Acknowledge that FTB will notify your client that you have access to their online account information.

  Note: You are required to read and check **all** the boxes before you submit your TIA relationship renewal request.
- Select the **Submit** button.

  Note: All relationship renewals are subject to FTB review and approval. We will notify your client once your renewal request is approved. Inform your client to expect this notification. Your current TIA client relationship will remain active while we process your renewal request.

Step 3: Confirmation of Renewal

- **Confirmation of Renewal** message displays to advise you that your request is being processed.
- Select the **Return to Client List** button to go back to your **Client List** page.