



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

You can renew TIA clients and ensure an uninterrupted relationship, when there are **between 90 and 5 calendar days** before the expiration date.

**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

**Be Advised:** You **must have your client's permission** to renew the relationship.

You can renew your TIA relationship with this client, if more than 90 days have passed since you added or renewed this client and more than 5 business days remain until your TIA relationship expires.

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

**Note:** If less than 5 business days remain before your TIA relationship expires, you **do not** have the option to renew this TIA relationship and you **must add your client** again.

Last Name ▾	First Name ▾	SSN/TIN	Relationship Type ▾	Online Access ▾	Expiration Date ▾	Actions ▾
Wood	Holly	XXX-XX-1111	TIA	Full	05/20/2020	<a href="#">Renew</a>   <a href="#">View Details</a>

### Step 2: Submit TIA Relationship Renewal Request

The **Renew TIA Relationship** page allows you to extend an active TIA relationship for an additional 13 months.

#### Step 2a:

- Read **all** statements in the **Read and check the boxes before submitting** section.

#### Step 2b:

- To submit your TIA relationship renewal request, you **must check all 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 view their account information online.

- \*  Under penalties of perjury under the laws of the State of California, I acknowledge that obtaining taxpayer account information is the privilege of the taxpayer and their authorized representatives and that unauthorized access to account information is unlawful as described in California Penal Code Section 502; Revenue & Taxation Code Section 19542.1; IRC Sections 7213, 7213A, and 7431; 18 USC section 1030; and Civil Code 1798.53.
- \*  By checking this box, I affirm that I have permission to renew the TIA relationship of the client listed above.
- \*  I further acknowledge that FTB will notify my client that I have access to view their account information online.

### Step 2c:

- 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

- Upon successful submission of your TIA relationship renewal request, a **Confirmation of Renewal** message displays on the **Renew TIA Relationship** page, to advise you that your request is being processed.

Your request to renew your TIA relationship with Holly Wood is being processed. Your current relationship will remain active while we process your request.

- Select the **Return to Client List** button to return to your **Client List** page.

