Tax Professional: Tax Information Authorization (TIA) – Revoke TIA Relationship

MyFTB allows you to revoke an active TIA client relationship. This will terminate the TIA relationship between you and your client. If you have no other active relationships with this client, you will not be able to access their online account information.

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

- Tax Information Authorization (TIA) – Check TIA Status
- Tax Information Authorization (TIA) – Add TIA Client

To revoke a TIA relationship online,

- 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.

- Search for your client whose TIA relationship you want to revoke, refer to Client List – Search for Client.

- Follow the instructions below.
Steps

Step 1: View TIA Relationship

- Select the View Details link in the in the Actions column of your Client List to view the relationship details.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>SSN/TIN</th>
<th>Relationship Type</th>
<th>Online Access</th>
<th>Expiration Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fisher</td>
<td>Hunter</td>
<td>XXX-XX-1111</td>
<td>TIA</td>
<td>Limited</td>
<td>05/16/2020</td>
<td>View Details</td>
</tr>
<tr>
<td>Wood</td>
<td>Holly</td>
<td>XXX-XX-2222</td>
<td>TIA</td>
<td>Limited</td>
<td>05/16/2020</td>
<td>View Details</td>
</tr>
</tbody>
</table>

Step 2: Revoke TIA Relationship

The Taxpayer Relationship Detail page displays all TIA and POA relationships you have with this client.

- Select the Revoke link in the Actions column in the Tax Information Authorization (TIA) Relationships with section for the TIA relationship you want to revoke.

<table>
<thead>
<tr>
<th>Status Date</th>
<th>Status</th>
<th>Expiration Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/16/2018</td>
<td>Active</td>
<td>05/16/2019</td>
<td>Revoke</td>
</tr>
</tbody>
</table>

Step 3: Confirm to Revoke TIA Relationship

When you confirm the revocation on the Tax Information Authorization (TIA) Relationship Detail page, it will end this TIA relationship with this client. You will not be able to obtain account information from FTB based on this relationship.

- Select the Revoke button in the Revoke Active TIA Relationship section to confirm you want to revoke your TIA relationship with this client.
Step 4: View Revoked Status

- View the status has been updated to **Revoked** in the **Status** column of the **Tax Information Authorization (TIA) Relationships with** section of the **Taxpayer Relationship Detail** page.

**Note:** You cannot access this client’s account information based on this TIA relationship. To establish a new TIA relationship with this client you can add them as a TIA client in MyFTB or submit a new, taxpayer-signed form FTB 3534, Tax Information Authorization.

<table>
<thead>
<tr>
<th>Status Date</th>
<th>Status</th>
<th>Expiration Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/15/2019</td>
<td>Revoked</td>
<td>05/16/2019</td>
<td></td>
</tr>
</tbody>
</table>