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.

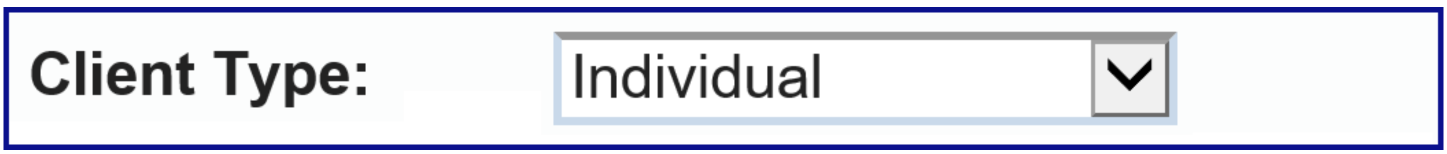
Steps

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.