Dr. Friday.

TAX & FINANCIAL FIRM, INC.

QUICK CHECKLIST

IRS Notice Quick Check

A 10-Minute First Response Checklist

Opening an IRS letter can feel stressful, especially if the notice mentions a balance, missing information, identity verification, or an audit. The safest first move is to slow down, read the letter, and capture the facts before responding.

DR. FRIDAY, EA

TAX YEAR & ADVICE NOTICE

Tax laws and IRS guidance can change and may differ by tax year. This guide provides general educational information, not personalized tax advice. Confirm the rules and deadlines for the tax year of your return, and consult a qualified tax professional about your situation.

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This checklist helps you identify what the IRS is asking for, what deadline matters, what records to save, and when the issue may be too risky to handle alone.

Key Takeaway: Most IRS letters tell you the issue, the tax year, what the IRS changed or needs, and what you should do next. Do not ignore the letter, but do not rush into a response before you understand it.

Dr. Friday Free Resource

IRS Notice Quick Check

Read the letter, find the deadline, and identify what the IRS wants.

1. **What notice number?**
   Find the CP or LTR number at the top of the letter.
2. **Which tax year?**
   Match the letter to the year or years involved.
3. **What is due?**
   Look for money owed, missing records, identity proof, or audit items.
4. **When is the deadline?**
   Calendar the response date before calling or mailing anything.
5. **What rights are listed?**
   Save appeal, protest, or hearing language if it appears.

Small win: know the notice type, tax year, deadline, and next action before responding.

IRS Notice Quick Check infographic for Dr. Friday resource guide.

Educational only. Check rules for your return's tax year.

Do This First

Before you call, pay, upload documents, or mail anything, find these items on the letter:

- [ ] Notice or letter number, usually starting with CP or LTR.
- [ ] Tax year or years involved.
- [ ] Date printed on the notice.
- [ ] Response deadline.
- [ ] IRS phone number or address shown on the notice.
- [ ] Amount due, refund change, missing document, identity question, or audit item.
- [ ] What the IRS says will happen if you do nothing.
- [ ] Whether the notice gives appeal, protest, or hearing rights.

Watch the Deadline: Some letters only ask for information. Others can affect penalties, interest, refunds, appeal rights, or audit results. The deadline on the letter matters.

Educational only. Check rules for your return's tax year.

What Kind of IRS Letter Is This?

Use this table as a first sort.

What the letter says	What it may mean	First safe step
Balance due	The IRS says tax, penalties, or interest are owed	Compare the amount to your return and payment records
Refund changed	The IRS changed or reduced the expected refund	Review the reason and compare it to your filed return
Missing return	The IRS believes a tax return was not filed	Confirm whether the return was filed and save proof
Income mismatch	IRS records do not match the income reported	Gather W-2s, 1099s, K-1s, brokerage records, or business income records
Identity verification	The IRS needs to confirm identity before processing	Follow official IRS instructions and avoid scam links
Audit or examination	The IRS is reviewing part of a tax return	Identify the items being examined and the document deadline
Request for documents	The IRS needs proof for an item on the return	Gather only organized, relevant records before responding

Educational only. Check rules for your return's tax year.

Records To Save Immediately

Create one folder for the letter. Save:

- [ ] Every page of the IRS letter.
- [ ] The envelope, if you still have it.
- [ ] A copy of the filed return for the tax year involved.
- [ ] Proof of payments, refunds, or estimated tax payments.
- [ ] W-2s, 1099s, K-1s, and brokerage forms.
- [ ] Receipts, logs, bank statements, or business records connected to the issue.
- [ ] Prior IRS letters about the same tax year.
- [ ] Notes from any IRS phone call.
- [ ] Copies of anything you send back.

> **Document Note:** Keep the original letter clean. If you write notes, use a copy or separate page so the original notice stays readable.

Educational only. Check rules for your return's tax year.

If the Letter Mentions an Audit

An audit is a review of a tax return. It does not automatically mean the return is wrong.

Common audit formats include:

- **Correspondence audit:** The IRS asks for documents by mail or fax.
- **Office audit:** You meet with an IRS representative and bring records.
- **Field audit:** An IRS examiner reviews records at a home, business, or representative's office.

If an audit letter arrives, identify:

- [ ] Which tax year is under review.
- [ ] Which income, deduction, credit, business item, real estate item, or other issue is being examined.
- [ ] What documents the IRS requests.
- [ ] How the IRS wants the documents sent.
- [ ] Whether more time may be needed.
- [ ] Whether representation may be appropriate before direct contact.

Common Mistakes To Avoid

- Ignoring the letter because it is stressful.
- Calling without the letter in front of you.
- Paying before checking whether the amount is correct.
- Sending original records without keeping copies.
- Sending a messy packet of unrelated documents.
- Missing a response deadline.
- Assuming every IRS letter is an audit.
- Assuming an audit means criminal trouble.
- Letting someone speak to the IRS without proper authorization.

Educational only. Check rules for your return's tax year.

When To Stop and Get Professional Help

Consider qualified help before responding if:

- The deadline is close.
- The letter mentions an audit, examination, appeal, lien, levy, or proposed change.
- You disagree with the IRS but are not sure how to prove it.
- The issue involves business income, rental property, cryptocurrency, real estate, dependents, credits, or multiple tax years.
- The IRS says you owe more than you can pay.
- You cannot find the records requested.
- You are worried about saying the wrong thing to the IRS.
- You need someone authorized to communicate with the IRS for you.

Ask Before You Respond: A short review before you answer can prevent missing documents, wrong explanations, or responses that do not match what the IRS requested.

Official IRS Links and Tools

- IRS notice and letter lookup: https://www.irs.gov/individuals/understanding-your-irs-notice-or-letter
- IRS audit information: https://www.irs.gov/businesses/small-businesses-self-employed/irs-audits
- IRS Taxpayer Bill of Rights: https://www.irs.gov/taxpayer-bill-of-rights
- IRS Publication 1, Your Rights as a Taxpayer: https://www.irs.gov/forms-pubs/about-publication-1
- IRS Form 2848, Power of Attorney and Declaration of Representative: https://www.irs.gov/forms-pubs/about-form-2848

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Official IRS Links and Tools

Educational Disclaimer

This resource is for general educational purposes only and is not personalized tax advice, legal advice, or IRS representation. Tax situations vary. Before acting on information in this checklist, consult a qualified tax professional about your specific facts and circumstances.

Educational only. Check rules for your return's tax year.

Next Step: Build Your IRS Response File

If this checklist helped you identify an IRS letter, deadline, audit issue, or missing record problem, the next step is to organize the full situation before you respond.

The **IRS Notice and Audit Response Workbook** helps you build a notice file, classify the letter, track deadlines, gather documents, prepare an audit response packet, organize call notes, and decide when the issue is no longer safe to handle alone.

It is a good fit if you:

- Have more than one IRS letter.
- Need to respond by a deadline.
- Are facing an audit or examination.
- Need to organize documents before contacting the IRS.
- Want your facts in order before asking Dr. Friday's office for help.

For help reviewing an IRS notice or audit letter, contact Dr. Friday Tax and Financial Firm, Inc.

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Explore the companion workbook

drfriday.com/resources/irs-notices/#workbook

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