

## Did You Receive a Letter or Notice From the IRS? Here is What to Expect and Some Next Steps You Should Take

**Note: Watch for scams!** The IRS will never contact a taxpayer using social media, text message, or request personal information over a telephone call (unless a call was already initiated by the taxpayer, or if the line got disconnected). **The first contact from the IRS usually comes in the mail.** If you are unsure whether you owe money to the IRS, you can view your [tax account information](#) on IRS.gov. For more information on how to submit a payment, please see our resources here.

The IRS mails letters or notices to taxpayers for a variety of reasons including if:

- They have a balance due
- They are due a larger or smaller refund
- The agency has a question about their tax return
- The agency needs to verify identity or needs additional information
- The agency changed their tax return

### **When an IRS letter or notice arrives in the mail, here's what you should do:**

#### **Step 1: Read the letter carefully and do NOT ignore it.**

For the most part, IRS letters and notices are about federal tax returns or tax accounts. Each notice deals with a specific issue and includes specific instructions on how to handle the situation. A notice may reference changes to a taxpayer's account, taxes owed, a payment request or a specific issue on a tax return.

Don't panic! Most of the time, all you need to do is read the letter carefully and take the appropriate action. Taking timely action is important as it could minimize additional [interest and penalty charges](#).

#### **Step 2: Review the information and take appropriate action.**

If a letter is about a changed or corrected tax return, you should review the information and compare it with the original return. If you agree, you should make notes about the corrections on your personal copy of the tax return and keep it for your records.

Typically, you will only need to [submit a payment](#) or take action by contacting the IRS if you do not agree with the information, if the IRS requested additional information, or if you have a balance due. For more information on how to submit a payment, please see our resources here.

#### **Step 3: Reply only if instructed to do so.**

Taxpayers don't need to reply to a notice unless specifically told to do so. There is usually no need to call the IRS. *If you do need to call the IRS, you should use the number in the upper right-hand corner of the notice and have a copy of their tax return and letter. It can be extremely challenging to get through to an IRS representative on the phone, although they are generally as helpful as possible once you are connected. Be patient and persistent, and try calling at different times of the day if you're not initially successful.*

If you do not agree with the IRS, a letter should be mailed to the IRS explaining the reason you are

disputing the notice. The letter should be sent to the address on the contact stub included with the notice. Please be sure to also include any information and documents for the IRS to review when considering the dispute.

We can contact the IRS on your behalf anytime you would like assistance. Because of IRS rules, we must be authorized by a signed Power of Attorney form (IRS Form 2848) in order to take any action on your account. If you would like our help, please contact your advisor and we will get a Power of Attorney prepared for your signature and then provide it to the IRS so that we will be authorized to address your tax account.

#### **Step 4: Keep the letter or notice for your records.**

Make sure to keep all notices and/or letters you receive from the IRS. These include adjustment notices when an action is taken on your tax account. **Be sure to also** keep records for at least three years from the date you filed your tax return.

You should also forward your notices and records to your advisor at JO or upload them to your client portal here. Please be sure to be in contact and communicate these happenings with us in a timely manner so that we can assist you as best as possible. Even if you do not need JO's assistance in resolving the notice, please be sure to provide a copy of the notice/letter and any action taken with your tax documents next year so that we are aware of the issue and can address it appropriate on your subsequent tax return.

For more information, feel free to use these IRS links to assist you further:

- To search for your notice or letter using the IRS search page, visit [Understanding Your IRS Notice or Letter](#) or contact the IRS at 800-829-1040.
- If you determine that your notice or letter is fraudulent, please follow the IRS assessor's guidance or visit [Report Phishing](#) for next steps and [Tax Scams/Consumer Alerts](#) for additional information.
- To get a copy of your IRS notice or letter in Braille or large print, visit the [Information About the Alternative Media Center](#) page for more details.

[Apply Online for a Payment Plan](#)

## Understanding Your IRS Tax Notice or Letter

**Note:** Typically, your notice or letter will explain the reason for the contact and give you instructions on how to handle the issue. If you agree with the information, there is no need to contact the IRS. Simply mail or make the payment online that is due found on your notice.

#### **Notice and Letter Search on the IRS website:**

- 1) Click on this link to [IRS Notice and Letters: Understanding your IRS Notice or Letter](#).
- 2) Enter the Notice number found on the right-hand corner of your letter and click the Search icon.
  - Depending on your Notice number you will receive information on:
    - What the notice is about
    - What you need to do
    - Frequently Asked Questions pertaining to the Notice
    - Other Reference Tools