

# Understanding IRS Tax Notices

Individual Tax Guides | Checklist | Updated October 15, 2026

A calm first-response checklist for reviewing an IRS letter or notice.

## Who should use this resource?

Designed for individual readers who want to organize records and prepare informed questions.

## What this resource covers

1. Read the notice number, tax period, and requested action
2. Compare it with your filed return and account records
3. Follow the response instructions and date stated on the notice
4. Keep copies of correspondence and proof of delivery

## How to use it

Work through each item using your own records. Mark items complete as you gather documents or finish a review. Keep original source records securely and check current instructions before filing or paying taxes.

## Review checklist

- ☐ Read the notice number, tax period, and requested action
- ☐ Compare it with your filed return and account records
- ☐ Follow the response instructions and date stated on the notice
- ☐ Keep copies of correspondence and proof of delivery

## Common mistakes to avoid

Do not rely on an earlier year's rule, estimate figures without source documents, or treat this worksheet as an official tax form. Verify current instructions before filing or paying.

## Official references

IRS: Understanding your IRS notice or letter: <https://www.irs.gov/individuals/understanding-your-irs-notice-or-letter>

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