

Prior Years, Amendments & Notices

Use for unfiled returns, corrections, or IRS/state correspondence.

Client name:

Tax year:

01 | What do you need?

List tax years and whether unfiled, amended/corrected, rejected, or related to an IRS/state notice. Identify each agency involved.

02 | Original filing

Was a return already filed? When, by whom, how, and under which filing status? Provide the complete filed copy and confirmation if available.

03 | What changed?

Describe omitted income, corrected forms, dependent/filing changes, missed expenses/credits, or other corrections. Give dates discovered.

04 | Notice details

Notice/letter number, date, affected year, response deadline, and requested action. Upload all pages and envelopes securely; do not paste SSNs here.

05 | Payments and refunds

What tax payments, refunds, offsets, credits, or estimated payments occurred? Dates and amounts? Provide account records and proof of payment.

06 | Missing documents

List W-2s, 1099s, business records, prior schedules, transcripts, and other information still needed. Any corrected documents expected?

Answer every item. Write None or Not sure when needed. Add a page for extra people/assets.

Save and reopen to check answers. Return only through your own preparer's secure portal.

This questionnaire is not an e-file authorization, tax election, or determination of eligibility.

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07 | Other filings

Any prior amendments, audit, reconsideration, appeals, identity-theft filing, or agency correspondence for the same issue? Include copies and dates.

08 | Dependents and marital changes

Any dispute over a dependent, duplicate claim, marriage/divorce status issue, or missing release? Describe facts and supporting records.

09 | Business and asset history

Any business/rental change, depreciation, sale, carryover, basis, loss, or prior election affecting the years being reviewed? Provide schedules.

10 | Identity and authorization

Any identity-theft or IP PIN requirement? Existing representative? Authorizations may be needed separately. Do not enter IP PINs or credentials here.

11 | Deadlines and contact

What response dates or other urgent matters apply? Best contact method? This form does not extend a deadline or establish representation.

12 | Your questions and documents

List questions, documents provided, and unresolved facts. Separate engagement and any necessary agency authorization must be handled with the preparer.

Answer every item. Write None or Not sure when needed. Add a page for extra people/assets.

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