IRS & FTB Notice Checklist and Log

Fill this in when a tax notice arrives, and send it to us with every page of the notice.

About the notice

WHO SENT IT	Choose	
NOTICE OR LETTER NUMBER		Top or bottom corner, for example CP2000.
DATE ON THE NOTICE		
TAX YEAR OR YEARS		
AMOUNT SHOWN, IF ANY		
RESPOND-BY DATE ON THE NOTICE		If it gives one.
DATE YOU RECEIVED IT		
DATE YOU SENT IT TO LAVICPA		

What to do

1. Open it the day it arrives and find the respond-by date. Missing it can limit your options.
2. Upload every page to the LaviCPA Client Portal, along with this sheet.
3. Hold off on calling, paying, or signing until we've read it, unless you already know it's right and just want to pay.
4. Keep the notice, and everything you send or receive about it, together in one place.
5. If a call, text, or email says it's the IRS or FTB and asks for payment or personal information, don't respond. Send us the details first.

I've uploaded every page of the notice to the LaviCPA Client Portal.

This worksheet organizes your records so we can prepare your return. It is not tax advice and it is not a tax return.

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Keep a running record of every call, letter, and payment about this notice.

Log

DATE	WHAT HAPPENED	WHO YOU DEALT WITH	REFERENCE OR AMOUNT

Anything else we should know