

IRS CONTACT ABOUT YOUR FILED TAX RETURN

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The information provided is general in nature, may not be applicable to your specific circumstances, and is not intended to be a substitute for or relied upon as personalized tax or legal advice.

Now that you have filed your 2024 tax year returns you may receive an IRS notice. Why? All returns undergo a random selection and computer screening process. The IRS computer algorithm checks for discrepancies and irregularities. Returns that are flagged will be reviewed by IRS personnel review. If the IRS needs to contact you, you will get a letter with contact information and instructions. The IRS will never contact you by phone.

Historically, the IRS audits less than 1% of tax returns.

Mailed CP2000 Notice. CP2000 is triggered when the income or payment information the IRS received from third parties, such as your W-2 or 1099INT, doesn't match the information reported on the tax return. This is not an audit. It is a request to adjust your income, payments, credits, and/or deductions that could result in additional tax owed or a refund.

The first page of the notice provides a summary of proposed changes to your tax, a phone number to call for assistance, and the steps you should take to respond, whether you agree or disagree with the notice.

Mailed CP501 Notice. CP501 is your first notice that you have not paid your taxes that are due. This notice will explain how much you owe, the deadlines for making a payment, and your options for payments. If you do not resolve this matter, expect to receive CP502, a reminder, and if not resolved CP503 where urgent action is required.

Mail Audit. Your return might have been flagged because it did not meet the IRS statistical expectations for similar returns. Or your business partner may have been selected for audit. IRS personnel will review items further before mailing a request for specific information.

In-person Office or Field Audit. Errors, inconsistencies, or omissions from what the IRS expected can trigger more intrusive procedures to validate your return. This is the most serious type of inquiry, requiring you to be prepared for a review of your financial affairs that have taxable impacts. An IRS agent will be interested in determining if all income and deductions were appropriately reflected on your return. An "interview" with a more experienced IRS agent might take place at an IRS office (office audit), your home, your business office, or your accountant's office (field audit).

If you are contacted regarding audits/examinations, appeals, collections, and refunds, contact your preparer, know that you have taxpayer rights. The Internal Revenue Service lists those rights in their Publication 1.

You have...

1. The Right to Be Informed
2. The Right to Quality Service
3. The Right to Pay No More than the Correct Amount of Tax
4. The Right to Challenge the IRS's Position and Be Heard
5. The Right to Appeal an IRS Decision in an Independent Forum
6. The Right to Finality
7. The Right to Privacy
8. The Right to Confidentiality
9. The Right to Retain Representation
10. The Right to a Fair and Just Tax System

Source: <https://www.irs.gov/pub/irs-pdf/p1.pdf>