AUS Tax Service

IRS Tax Account Review Checklist

Start with the years and records you already have

Private preparation only. Do not record Social Security numbers, IRS passwords, full account numbers or payment confirmation numbers.

Part A — Tax years to review

A missing record is a question to investigate, not proof you had to file.

Tax year	Believe return filed?	Transcript available?	Follow-up?

Use Yes / No / Not sure. Keep filed returns and filing acknowledgments separately.

If a notice has a deadline, follow the actual notice instructions. A consultation or transcript request does not extend that deadline or stop collections.

Gather evidence without sharing sensitive records here

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Part B — IRS records checklist

- ☐ Tax Account Transcript for relevant years
- ☐ Tax Return Transcript
- ☐ Wage and Income Transcript
- ☐ Record of Account Transcript, if appropriate
- ☐ IRS notices and letters
- ☐ Payment confirmations (kept separately)
- ☐ Prior filed returns and filing acknowledgments

Part C — Potential problems to discuss

- ☐ Missing returns or uncertain filing history
- ☐ Unexpected IRS balance
- ☐ Payment missing or applied to a different year
- ☐ Penalty or interest entries
- ☐ Records that do not match
- ☐ IRS notice needing clarification

Prepare your questions and choose the next step

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Part D — Three consultation questions

1. _____

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2. _____

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3. _____

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Part E — Next steps

1. Obtain free IRS transcripts through your own IRS Online Account. Other official methods include mail, the automated phone service, or Form 4506-T when appropriate.

2. Compare the tax year, transcript type and date with your own returns, notices and payment records. Processing delays and incomplete records can explain differences.

3. If several years, unexplained payments or notices are involved, ask whether a professional review would help. Scope, fee and any authorization are discussed first.

Request a free 10-minute introductory consultation → austaxservice.com