AMENDED-RETURN REVIEW / 01

LABEL THE PRIOR-FILING QUESTION

Use neutral labels and document status. Do not copy tax figures, identifiers or private notice contents.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Y1: tax year / broad return type / jurisdiction to discuss

Prior filed copy: available, incomplete or not located / private custodian role

C1: new or corrected document category / version label / question for review

C2: new or corrected document category / version label / question for review

Other filing or jurisdiction questions for professional assessment - no conclusions

Main question for the consultation / decision you need the professional to explain

Preparation only. Not tax or legal advice, a decision to amend, a form or filing guide, deadline or tax calculation, notice interpretation or outcome promise. Keep private tax records and identifiers out.

AMENDED-RETURN REVIEW / 02

TRACK CHANGED RECORDS AND UNKNOWNS

Keep original and changed versions distinct. A changed record does not establish what action is needed.

C1: prior version available? / changed version available? / missing item / owner role

C2: prior version available? / changed version available? / missing item / owner role

Record categories the professional requests / readiness / next handoff owner

Question still awaiting review / information needed / who will clarify it

Professional review conclusion to record later in general terms / unanswered question

Any additional review scope to agree / related filing question / private handoff method

Preparation only. Not tax or legal advice, a decision to amend, a form or filing guide, deadline or tax calculation, notice interpretation or outcome promise. Keep private tax records and identifiers out.

AMENDED-RETURN REVIEW / 03

SEPARATE REVIEW FROM LATER WORK

Tick what is clarified. This worksheet is neither a filing instruction nor permission to act.

- [ ] Prior filing questions have neutral labels
- [ ] Filed-copy readiness is marked without copying private data
- [ ] Changed document categories are linked to specific questions
- [ ] Original and corrected version labels are separate
- [ ] Missing records have an owner or an open question
- [ ] The professional will assess whether any action is needed
- [ ] Review and any later work are separate scope decisions
- [ ] Private handoff, returned copies and follow-up are discussed

Review-only scope / deliverable or explanation expected / exclusions

Further work, if agreed: professional-defined scope / separate agreement needed

Follow-up owner / copies or confirmation to receive / unresolved question

Preparation only. Not tax or legal advice, a decision to amend, a form or filing guide, deadline or tax calculation, notice interpretation or outcome promise. Keep private tax records and identifiers out.

AMENDED-RETURN REVIEW / 04

QUESTIONS FOR THE TAX PROFESSIONAL

Ask for an explanation of the review process. Do not use this pack to make a tax or filing decision.

Review inputs: which filed copies and changed-record categories are needed?

Versions: how should original, corrected and missing records be identified privately?

Coverage: which years, jurisdictions or related filings need assessment?

Conclusion: how will you explain findings, uncertainty and proposed next steps?

Later work: what separate scope and authorization would be needed if we proceed?

Follow-up: which copies, correspondence questions and support are included?

Preparation only. Not tax or legal advice, a decision to amend, a form or filing guide, deadline or tax calculation, notice interpretation or outcome promise. Keep private tax records and identifiers out.

AMENDED-RETURN REVIEW / 05

COMPARE THE SAME REVIEW REQUEST

Use A and B in every box. A review-only proposal is not the same scope as later filing work.

Professional A / B / consultation dates / shared Y1 and C1-C2 question labels

Initial review, requested records, jurisdictions and exclusions - A / B

Explanation of findings, optional later work and private handoff - A / B

Follow-up, returned copies, written fee basis and unresolved questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Tax Preparation request. Describe the prior-filing review and general record readiness without private tax details so participating pros can compete with proposals. Compare review scope, private handoff, follow-up, written fees and fit. Availability varies.

One request. Every pro's best offer.

Start a request

Participation varies. A private consultation and secure prior-record review may be needed before a final engagement scope.

Planning guide: https://www.pickyourpro.ai/services/tax-preparation/amended-returns

IRS: File an amended return (official reference)

IRS: Amended return frequently asked questions (official reference)

Preparation only. Not tax or legal advice, a decision to amend, a form or filing guide, deadline or tax calculation, notice interpretation or outcome promise. Keep private tax records and identifiers out.