

## Appendix II. What Documents May Be Filed by Self-Represented Petitioners

The table below lists documents commonly found in Tax Court cases and may be used before eFiling to correctly title a document. Those marked “NO” in the “Eligible for eFiling?” column must be submitted to the Court in paper form or, for documents such as expert reports and discovery requests, are not filed with the Court. A document may be eFiled unless it is listed below as ineligible for eFiling.

Description	Code	Category	Eligible for eFiling?
AFFIDAVIT OF [name] IN SUPPORT OF [document name]	AFF	Supporting Document	
AGREED COMPUTATION FOR ENTRY OF DECISION			<b>NO</b>
AMENDED [document name]	AMND	Miscellaneous	
AMENDED CERTIFICATE OF SERVICE OF [document name]	AMDC	Miscellaneous	
AMENDED PETITION	PAP	Petition	
AMENDED PRETRIAL MEMORANDUM	APTM	Pretrial Memorandum	
AMENDED REPLY TO ANSWER	RA	Reply	
AMENDED SIMULTANEOUS ANSWERING BRIEF	ASAB	Simultaneous Brief	
AMENDED SIMULTANEOUS ANSWERING MEMORANDA OF LAW	ASAM	Simultaneous Brief	
AMENDED SIMULTANEOUS MEMORANDA OF LAW	ASML	Simultaneous Brief	
AMENDED SIMULTANEOUS OPENING BRIEF	ASOB	Simultaneous Brief	
AMENDED SIMULTANEOUS SUR-REPLY BRIEF	AISB	Simultaneous Brief	
AMENDMENT TO [document name]	AMNT	Miscellaneous	
AMENDMENT TO AMENDED PETITION	PAAP	Petition	
AMENDMENT TO PETITION	ATP	Petition	
AMENDMENT TO PRETRIAL MEMORANDUM	ATPM	Pretrial Memorandum	

<b>Description</b>	<b>Code</b>	<b>Category</b>	<b>Eligible for eFiling?</b>
AMENDMENT TO REPLY TO ANSWER	RAA	Reply	
AMENDMENT TO SECOND AMENDED PETITION	PASP	Petition	
AMENDMENT TO SIMULTANEOUS ANSWERING BRIEF	ATAB	Simultaneous Brief	
AMENDMENT TO SIMULTANEOUS ANSWERING MEMORANDA OF LAW	ATAM	Simultaneous Brief	
AMENDMENT TO SIMULTANEOUS MEMORANDA OF LAW	ATSM	Simultaneous Brief	
AMENDMENT TO SIMULTANEOUS OPENING BRIEF	ATOB	Simultaneous Brief	
AMENDMENT TO SIMULTANEOUS SUR-REPLY BRIEF	ATSB	Simultaneous Brief	
AMENDMENT TO THIRD AMENDED PETITION	PATP	Petition	
APPLICATION FOR WAIVER OF FILING FEE	APW	Application	
APPLICATION TO TAKE DEPOSITION OF [name]	APLD	Application	
BRIEF IN SUPPORT OF [document name]	BRF	Supporting Document	
COMPUTATION FOR ENTRY OF DECISION	COED	Computation	
DECLARATION OF [name] IN SUPPORT OF [document name]	DCL	Supporting Document	
INTERVENING PETITION			<b>NO</b>
MEMORANDUM	MEMO	Memorandum	
MEMORANDUM IN SUPPORT OF [document name]	MISP	Supporting Document	
MOTION FOR AN ORDER UNDER FEDERAL RULE OF EVIDENCE 502(d)	M001	Motion	
MOTION FOR AN ORDER UNDER MODEL RULE OF PROFESSIONAL CONDUCT 4.2	M002	Motion	
MOTION FOR APPOINTMENT OF MEDIATOR	M003	Motion	
MOTION FOR ASSIGNMENT OF JUDGE	M004	Motion	
MOTION FOR CERTIFICATION OF AN INTERLOCUTORY ORDER TO PERMIT IMMEDIATE APPEAL	M005	Motion	
MOTION FOR CONTINUANCE	M006	Motion	

<b>Description</b>	<b>Code</b>	<b>Category</b>	<b>Eligible for eFiling?</b>
MOTION FOR DEFAULT AND DISMISSAL	M009	Motion	
MOTION FOR ENTRY OF DECISION	M007	Motion	
MOTION FOR ESTATE TAX DEDUCTION DEVELOPING AT OR AFTER TRIAL PURSUANT TO RULE 156	M010	Motion	
MOTION FOR EXTENSION OF TIME	M011	Motion	
MOTION FOR INTERNATIONAL JUDICIAL ASSISTANCE	M012	Motion	
MOTION FOR LEAVE TO CONDUCT DISCOVERY PURSUANT TO RULE 70(a)(2)	M013	Motion	
MOTION FOR LEAVE TO FILE	M115	Motion	
MOTION FOR LEAVE TO FILE OUT OF TIME [document name]	M014	Motion	
MOTION FOR LEAVE TO SERVE ADDITIONAL INTERROGATORIES	M015	Motion	
MOTION FOR MORE DEFINITE STATEMENT PURSUANT TO RULE 51	M016	Motion	
MOTION FOR NON-BINDING MEDIATION	M017	Motion	
MOTION FOR ORAL ARGUMENT	M018	Motion	
MOTION FOR ORDER FIXING AMOUNT OF AN APPEAL BOND	M019	Motion	
MOTION FOR ORDER TO RELEASE THE AMOUNT OF AN APPEAL BOND	M020	Motion	
MOTION FOR ORDER TO SHOW CAUSE WHY CASE SHOULD NOT BE SUBMITTED ON THE BASIS OF THE ADMINISTRATIVE RECORD	M021	Motion	
MOTION FOR ORDER TO SHOW CAUSE WHY JUDGMENT SHOULD NOT BE ENTERED ON THE BASIS OF A PREVIOUSLY DECIDED CASE	M022	Motion	
MOTION FOR ORDER TO SHOW CAUSE WHY PROPOSED FACTS AND EVIDENCE SHOULD NOT BE ACCEPTED AS ESTABLISHED PURSUANT TO RULE 91(f)	M023	Motion	
MOTION FOR PARTIAL SUMMARY JUDGMENT	M024	Motion	
MOTION FOR PRELIMINARY INJUNCTION	M025	Motion	

<b>Description</b>	<b>Code</b>	<b>Category</b>	<b>Eligible for eFiling?</b>
MOTION FOR PROTECTIVE ORDER PURSUANT TO RULE 103	M026	Motion	
MOTION FOR REASONABLE LITIGATION OR ADMINISTRATIVE COSTS	M027	Motion	
MOTION FOR RECONSIDERATION OF FINDINGS OR OPINION PURSUANT TO RULE 161	M028	Motion	
MOTION FOR RECONSIDERATION OF ORDER	M029	Motion	
MOTION FOR RECUSAL OF JUDGE	M030	Motion	
MOTION FOR REVIEW BY THE FULL COURT	M031	Motion	
MOTION FOR REVIEW EN BANC	M032	Motion	
MOTION FOR REVIEW OF JEOPARDY ASSESSMENT OR JEOPARDY LEVY PURSUANT TO RULE 56	M033	Motion	
MOTION FOR SUMMARY JUDGMENT	M034	Motion	
MOTION FOR THE COURT TO PAY THE EXPENSES OF A TRANSCRIPT	M035	Motion	
MOTION FOR THE COURT TO PAY THE EXPENSES OF AN INTERPRETER	M036	Motion	
MOTION FOR VOLUNTARY BINDING ARBITRATION	M037	Motion	
MOTION FOR VOLUNTARY MEDIATION	M038	Motion	
MOTION FOR WRIT OF HABEAS CORPUS AD TESTIFICANDUM	M039	Motion	
MOTION IN LIMINE	M040	Motion	
MOTION TO ADD LIEN OR LEVY DESIGNATION	M041	Motion	
MOTION TO ADD SMALL TAX CASE DESIGNATION	M042	Motion	
MOTION TO AMEND ORDER	M043	Motion	
MOTION TO APPOINT AN INTERPRETER PURSUANT TO RULE 143(f)	M045	Motion	
MOTION TO APPOINT NEW TAX MATTERS PARTNER	M044	Motion	
MOTION TO BE EXCUSED FROM APPEARING AT THE TRIAL SESSION	M047	Motion	
MOTION TO BE RECOGNIZED AS NEXT FRIEND	M049	Motion	

<b>Description</b>	<b>Code</b>	<b>Category</b>	<b>Eligible for eFiling?</b>
MOTION TO BIFURCATE	M050	Motion	
MOTION TO CALENDAR	M051	Motion	
MOTION TO CALENDAR AND CONSOLIDATE	M052	Motion	
MOTION TO CERTIFY FOR INTERLOCUTORY APPEAL	M055	Motion	
MOTION TO CHANGE OR CORRECT CAPTION	M056	Motion	
MOTION TO CHANGE PLACE OF HEARING OF DISCLOSURE CASE			<b>NO</b>
MOTION TO CHANGE PLACE OF SUBMISSION OF DECLARATORY JUDGMENT CASE	M058	Motion	
MOTION TO CHANGE PLACE OF TRIAL	M059	Motion	
MOTION TO CHANGE SERVICE METHOD	M060	Motion	
MOTION TO CLARIFY ORDER	M061	Motion	
MOTION TO CLOSE ON GROUND OF DUPLICATION	M062	Motion	
MOTION TO COMPEL DISCOVERY	M063	Motion	
MOTION TO COMPEL PRODUCTION OF DOCUMENTS	M064	Motion	
MOTION TO COMPEL RESPONSES TO INTERROGATORIES	M065	Motion	
MOTION TO COMPEL THE TAKING OF DEPOSITION	M066	Motion	
MOTION TO CONSOLIDATE	M067	Motion	
MOTION TO CORRECT AND CERTIFY RECORD ON APPEAL	M053	Motion	
MOTION TO CORRECT TRANSCRIPT	M054	Motion	
MOTION TO DEPOSE PURSUANT TO RULE 74	M068	Motion	
MOTION TO DETERMINE THE TAX MATTERS PARTNER	M069	Motion	
MOTION TO DISMISS	M070	Motion	
MOTION TO DISMISS FOR FAILURE TO PROPERLY PROSECUTE	M071	Motion	

<b>Description</b>	<b>Code</b>	<b>Category</b>	<b>Eligible for eFiling?</b>
MOTION TO DISMISS FOR FAILURE TO STATE A CLAIM UPON WHICH RELIEF CAN BE GRANTED	M072	Motion	
MOTION TO DISMISS FOR LACK OF JURISDICTION	M073	Motion	
MOTION TO DISMISS FOR LACK OF PROSECUTION	M074	Motion	
MOTION TO DISMISS ON GROUNDS OF MOOTNESS	M075	Motion	
MOTION TO ENFORCE A REFUND OF OVERPAYMENT PURSUANT TO RULE 260	M076	Motion	
MOTION TO ENFORCE SUBPOENA	M077	Motion	
MOTION TO FILE DOCUMENT UNDER SEAL			<b>NO</b>
MOTION TO IMPOSE A PENALTY	M080	Motion	
MOTION TO IMPOSE SANCTIONS	M081	Motion	
MOTION TO INTERVENE			<b>NO</b>
MOTION TO MODIFY DECISION IN ESTATE TAX CASE PURSUANT TO RULE 262	M083	Motion	
MOTION TO PERMIT EXPERT WITNESS TO TESTIFY WITHOUT A WRITTEN REPORT REGARDING INDUSTRY PRACTICE PURSUANT TO RULE 143(f)(2)	M084	Motion	
MOTION TO PRECLUDE	M085	Motion	
MOTION TO PROCEED ANONYMOUSLY			<b>NO</b>
MOTION TO QUASH OR MODIFY SUBPOENA	M087	Motion	
MOTION TO REDETERMINE INTEREST PURSUANT TO RULE 261	M089	Motion	
MOTION TO REMAND	M090	Motion	
MOTION TO REMOVE SMALL TAX CASE DESIGNATION	M091	Motion	
MOTION TO REMOVE TAX MATTERS PARTNER	M092	Motion	
MOTION TO REOPEN THE RECORD	M093	Motion	
MOTION TO RESTORE CASE TO THE GENERAL DOCKET	M095	Motion	

<b>Description</b>	<b>Code</b>	<b>Category</b>	<b>Eligible for eFiling?</b>
MOTION TO RESTRAIN ASSESSMENT OR COLLECTION OR TO ORDER REFUND OF AMOUNT COLLECTED	M096	Motion	
MOTION TO RETAIN FILE IN ESTATE TAX CASE INVOLVING § 6166 ELECTION PURSUANT TO RULE 157	M097	Motion	
MOTION TO REVIEW THE SUFFICIENCY OF ANSWERS OR OBJECTIONS TO REQUEST FOR ADMISSIONS	M098	Motion	
MOTION TO SEAL CASE			<b>NO</b>
MOTION TO SET FOR A TIME & DATE CERTAIN	M099	Motion	
MOTION TO SEVER	M100	Motion	
MOTION TO SHIFT THE BURDEN OF PROOF	M101	Motion	
MOTION TO SHORTEN THE TIME	M102	Motion	
MOTION TO STAY PROCEEDINGS	M103	Motion	
MOTION TO STAY PROPOSED SALE OF SEIZED PROPERTY	M104	Motion	
MOTION TO STRIKE	M105	Motion	
MOTION TO SUBMIT CASE PURSUANT TO RULE 122	M106	Motion	
MOTION TO SUBSTITUTE PARTIES AND CHANGE CAPTION	M107	Motion	
MOTION TO TAKE DEPOSITION PURSUANT TO RULE 74(c)(3)	M108	Motion	
MOTION TO TAKE JUDICIAL NOTICE	M109	Motion	
MOTION TO VACATE OR REVISE PURSUANT TO RULE 161	M110	Motion	
MOTION TO WITHDRAW	M111	Motion	
MOTION TO WITHDRAW COUNSEL	M116	Motion	
MOTION TO WITHDRAW OR MODIFY THE DEEMED ADMITTED ADMISSIONS PURSUANT TO RULE 90(f)	M113	Motion	
NOTICE OF APPEAL			<b>NO</b>
NOTICE OF CHANGE OF ADDRESS	NCA	Notice	

<b>Description</b>	<b>Code</b>	<b>Category</b>	<b>Eligible for eFiling?</b>
NOTICE OF CHANGE OF COUNSEL FOR NON PARTY	NCNP	Notice	
NOTICE OF CLARIFICATION OF TAX MATTERS PARTNER	NCTP	Notice	
NOTICE OF CONCESSION	NCON	Notice	
NOTICE OF DEATH OF COUNSEL	NDC	Notice	
NOTICE OF ELECTION TO INTERVENE			<b>NO</b>
NOTICE OF ELECTION TO PARTICIPATE			<b>NO</b>
NOTICE OF IDENTIFICATION OF TAX MATTERS PARTNER	NITM	Notice	
NOTICE OF INTENT NOT TO FILE	NINF	Notice	
NOTICE OF INTERVENTION			<b>NO</b>
NOTICE OF ISSUE CONCERNING FOREIGN LAW	NIFL	Notice	
NOTICE OF JUDICIAL RULING	NRJR	Notice	
NOTICE OF NO OBJECTION	NNOB	Notice	
NOTICE OF OBJECTION	OBJN	Notice	
NOTICE OF PROCEEDING IN BANKRUPTCY	NPB	Notice	
NOTICE OF RELEVANT JUDICIAL DECISIONS	NRJD	Notice	
NOTICE OF SMALL TAX CASE ELECTION	NSTE	Notice	
NOTICE OF SUBMISSION OF EXPERT REPORT			<b>NO<sup>3</sup></b>
NOTICE OF SUPPLEMENTAL AUTHORITY	NSA	Notice	
NOTICE OF TERMINATION ASSESSMENT	NTA	Notice	
OPPOSITION TO [document name]	OPPO	Opposition	
OWNERSHIP DISCLOSURE STATEMENT	DISC	Statement	
PETITION FILED			<b>NO</b>
PRETRIAL MEMORANDUM	PMT	Pretrial Memorandum	

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<sup>3</sup>An expert report is submitted to the trial Judge in paper form 30 days before the calendar call unless otherwise directed by the trial Judge. An expert report may be offered into evidence at trial. Expert reports are not eFiled.

<b>Description</b>	<b>Code</b>	<b>Category</b>	<b>Eligible for eFiling?</b>
RATIFICATION OF PETITION			<b>NO</b>
REDACTED [document name]	REDC	Miscellaneous	
REDACTED PETITION FILED	PTFR	Petition	
REPLY TO [document name]	REPL	Reply	
REPLY TO ANSWER	RTA	Reply	
REPLY TO ANSWER TO AMENDED PETITION	RTAA	Reply	
REPLY TO ANSWER TO AMENDMENT TO PETITION	RATA	Reply	
REPLY TO ANSWER TO PETITION, AS AMENDED	RAPA	Reply	
REPLY TO ANSWER TO SECOND AMENDED PETITION	RTSA	Reply	
REPLY TO ANSWER TO SUPPLEMENT TO PETITION	RSTA	Reply	
REPLY TO ANSWER TO THIRD AMENDED PETITION	RTAP	Reply	
REQUEST FOR ADMISSIONS	REQA	Request	
REQUEST FOR JUDICIAL NOTICE	RJN	Request	
REQUEST FOR PLACE OF HEARING OF DISCLOSURE CASE			<b>NO</b>
REQUEST FOR PLACE OF SUBMISSION OF DECLARATORY JUDGMENT CASE	RQSD	Request	
REQUEST FOR PLACE OF TRIAL	RQT	Request	
REQUEST FOR PRODUCTION OF DOCUMENTS			<b>NO</b>
REQUEST FOR RESPONSES TO INTERROGATORIES			<b>NO</b>
RESPONSE TO [document name]	RSP	Response	
RESPONSE TO REQUEST FOR PRODUCTION OF DOCUMENTS			<b>NO</b>
RESPONSE TO REQUEST FOR RESPONSES TO INTERROGATORIES			<b>NO</b>
REVISED COMPUTATION	RCOM	Computation	
SECOND AMENDED PETITION	PSAP	Petition	
SECOND AMENDMENT TO PETITION	PSAT	Petition	

<b>Description</b>	<b>Code</b>	<b>Category</b>	<b>Eligible for eFiling?</b>
SERIATIM ANSWERING BRIEF	SEAB	Seriatum Brief	
SERIATIM OPENING BRIEF	SEOB	Seriatum Brief	
SERIATIM REPLY BRIEF	SERB	Seriatum Brief	
SERIATIM SUR-REPLY BRIEF	SESB	Seriatum Brief	
SETTLEMENT STIPULATION			<b>NO</b>
SIMULTANEOUS ANSWERING BRIEF	SIAB	Simultaneous Brief	
SIMULTANEOUS ANSWERING MEMORANDA OF LAW	SIAM	Simultaneous Brief	
SIMULTANEOUS MEMORANDA OF LAW	SIML	Simultaneous Brief	
SIMULTANEOUS OPENING BRIEF	SIOB	Simultaneous Brief	
SIMULTANEOUS SUR-REPLY BRIEF	SISB	Simultaneous Brief	
STATEMENT OF TAXPAYER IDENTIFICATION NUMBER (Form 4)			<b>NO<sup>4</sup></b>
STATEMENT UNDER RULE 212	S212	Statement	
STATEMENT UNDER RULE 50(c)	STAR	Statement	
STATUS REPORT	RPT	Miscellaneous	
STIPULATED DECISION	SDEC	Decision	<b>NO</b>
STIPULATION	STP	Stipulation	
STIPULATION OF FACTS	STIP	Stipulation	
STIPULATION OF PRETRIAL DEADLINES	SPD	Stipulation	
STIPULATION OF SETTLED ISSUES	STST	Stipulation	
STIPULATION OF SETTLEMENT	STS	Stipulation	
STIPULATION TO BE BOUND	STBB	Stipulation	
STIPULATION TO TAKE DEPOSITION OF [name]	STPD	Stipulation	
SUPPLEMENT TO [document name]	SUPM	Supplement	

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<sup>4</sup>The Statement of Taxpayer Identification Number, Form 4, is submitted in paper form with the petition. It may not be eFiled and is never made part of the Court's public files.

<b>Description</b>	<b>Code</b>	<b>Category</b>	<b>Eligible for eFiling?</b>
SUPPLEMENT TO PETITION	PSUP	Petition	
SUPPLEMENT TO PRETRIAL MEMORANDUM	STPM	Pretrial Memorandum	
SUPPLEMENT TO SIMULTANEOUS ANSWERING BRIEF	SSAB	Simultaneous Brief	
SUPPLEMENT TO SIMULTANEOUS ANSWERING MEMORANDA OF LAW	STAM	Simultaneous Brief	
SUPPLEMENT TO SIMULTANEOUS MEMORANDA OF LAW	STSM	Simultaneous Brief	
SUPPLEMENT TO SIMULTANEOUS OPENING BRIEF	SSOB	Simultaneous Brief	
SUPPLEMENT TO SIMULTANEOUS SUR-REPLY BRIEF	SSSB	Simultaneous Brief	
SUPPLEMENTAL [document name]	SUPT	Supplement	
THIRD AMENDED PETITION	PTAP	Petition	
THIRD AMENDMENT TO PETITION	PTAT	Petition	
UNREDACTED [document name]	URED	Miscellaneous	
UNSWORN DECLARATION OF [name] UNDER PENALTY OF PERJURY IN SUPPORT OF [document name]	USDL	Supporting Document	