United States Tax Court

PUBLIC GUIDE

DAWSON
CASE MANAGEMENT SYSTEM

United States Tax Court

Washington, DC

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INTRODUCTION

WHAT IS DAWSON?

The U.S. Tax Court's case management system, DAWSON (Docket Access Within a Secure Online Network), is an electronic filing and case management system designed to make it easier for parties and the Court to start a Tax Court case, file and process documents, and manage cases. DAWSON has a public search feature where the public can search for cases, orders, and opinions that are not sealed. Public users can search for Practitioners that have a U.S. Tax Court Bar number. Public users can also view scheduled trial sessions.

HOW TO ACCESS DAWSON

You can access DAWSON from a link on the Court's website (https://ustaxcourt.gov/) or by going to https://dawson.ustaxcourt.gov/.

BROWSER COMPATIBILITY

DAWSON is compatible with most up-to-date browsers such as Chrome, Edge, Firefox, or Safari. It is not compatible with outdated browsers such as Internet Explorer.

DAWSON IS MOBILE-FRIENDLY

You can access DAWSON from your mobile device.

- Anything you can do on a computer in DAWSON, you can do on your mobile device: file a Petition, view your case(s), file a document, etc.
- You can also search for cases, orders, opinions, and practitioners on your mobile device.
- Scheduled trial sessions can be viewed on your mobile device.

WHAT DOCUMENTS ARE VIEWABLE ELECTRONICALLY BY THE GENERAL PUBLIC?

- Opinions and orders issued by the Court.
- Post-trial briefs e-Filed by practitioners on or after August 1, 2023.
- Amicus briefs filed on or after August 1, 2023.
- Stipulated Decisions filed on or after August 1, 2023.
- Documents in sealed cases, or individual documents that are sealed, are **not** viewable other than by the parties.

FIND A CASE

You can search for a case by Petitioner Name or Docket Number on the Case tab.

SEARCH BY DOCKET NUMBER

1. To search for a case by Docket Number, you must include the dash in the Docket Number (e.g., 123-18).
2. You may, but do not have to, include the letter suffix (S, L, SL, R, X, D, or P) of the Docket Number to find a case.
3. When you enter a Docket Number that matches a case in the system, that case will display. If you enter a Docket Number that has no matching case, you will get a "No Matches Found" message.

SEARCH BY NAME

1. To search for a case by petitioner name, you must enter the petitioner's full or last name. Partial name searches (e.g., entering "Ron" for Ronald) are not currently supported.

2. You can improve your search results by filtering the **Country**, **State**, **Date filed start date, Date filed end date, Case procedure, or Case type (i.e. docket suffix)** to further refine your search. If the United States is selected, U.S. Territories and military bases are included. These fields are not required but can be used in any combination to refine results.

VIEW A CASE DOCKET RECORD

Any case docket record that is not sealed can be viewed in DAWSON.

1. After using the Case Search (described in the previous section), click on the case docket number link from the results list to open the case docket record.

Search

Case   Order   Opinion   Practitioner

Anyone can search for a case in our system for cases filed **on or after May 1, 1986**.
- If you aren't affiliated with a case, you will only see limited information about that case.
- Sealed cases and affiliated documents will not display in search results.

Search by Name

Petitioner name (required)
Advanced syntax search (*, "", - , etc.) is not supported at this time.

| Doe |

Country
( ) All   ( ) United States   ( ) International

Date filed start date   Date filed end date
MM/DD/YYYY   MM/DD/YYYY

Case procedure
( ) All   ( ) Regular   ( ) Small

Case type (i.e., docket suffix)
- Select one or more -

Search   Clear Search

Search by Docket Number

Docket number (required)
Example of docket number format: 123-19

Search   Clear Search

Results

29 match(es) shown

	Petitioner(s)	Docket No.	Filed Date	Case Title	State
1	John Doe	17809-17	08/21/17	John Doe	Texas
2	Jane Doe	7778-08	04/01/08	Jane Doe	Massachusetts
3	Joseph Doe	9400-08	04/21/08	Joseph Doe	New York

2. The case docket record will display. Note that only some of the documents on the docket record are available for viewing by the public. Documents available for viewing have a hyperlink. See list of documents in the section What Documents are Viewable Electronically by the General Public? of this guide.

Welcome to DAWSON

Docket Number: 1234-24

John Doe, Petitioner v. Commissioner of Internal Revenue, Respondent

Docket Record

Docket Record

🖶 Printable Docket Record

Filter by   All documents ⇳

No. ↑↓	Filed Date ↑	Event ↑↓	Filings and Proceedings ↑↓	Pages ↑↓	Filed By ↑↓	Action ↑↓	Served ↑↓	Parties ↑↓
1	09/23/24	P	Petition	3	Petr. John Doe		09/24/24	R
2	09/23/24	RQT	Request for Place of Trial at Cleveland, Ohio	0				
3	09/24/24	NOTR	Notice of Receipt of Petition	3			09/24/24	P
4	09/24/24	OF	Order for Filing Fee on 10-24-2024	1			09/24/24	B
5	10/11/24	FEE	Filing Fee Paid	0				
6	11/04/24	A	Answer (Attachment(s))	19	Resp.		11/04/24	B
7	11/04/24	EA	Entry of Appearance for Respondent	2	Resp.		11/04/24	B

3. When viewing the docket record of a case, you can sort each column, filter for specific document types, and/or print the docket record.
4. To view a document that is available for viewing (indicated by the hyperlink), click on the link. The document will display.
5. To return to the docket record of the case, click on the back button in your browser.

An order is a written direction or command issued by a Judge. Each day's orders are posted on the Court's website, www.ustaxcourt.gov. Click on the **Orders and Opinions** menu and select **Today's Orders**. You can also navigate directly to the page by going here: https://dawson.ustaxcourt.gov/todays-orders.

To search for an order, you can search by a keyword or phrase. In addition, you may also narrow your search results by adding a specific Docket Number, Case Title/Petitioner's name, the Judge who issued the order, or by including a specific date or date range.

HOW TO SEARCH FOR AN ORDER

1. Go to https://dawson.ustaxcourt.gov/
2. Click the **Order** tab.

3. Search orders with a keyword or phrase.
   a. When search is initiated from the keyword or phrase area, DAWSON will include in the search:
      i. The case caption.
      ii. The content of the order.
      iii. The order title.
   b. For exact matches, be sure to include quotation marks around your search term.
      i. For example: Search **"innocent spouse"** for results containing that exact phrase.
   c. Do not enter quotation marks for searches that you do not want exact matches for.
      i. For example: If you enter **Smith** for your search, results will include terms that include **Smith**, as well as **Smithson**.
4. Use Connectors (| , +) with keywords/phrases.

a. You can use connectors in combination with the exact keyword or phrase search.
   i. **OR (|)**
      1. Use the | (pipe character) to find documents containing one or more of the keywords or phrases.
      2. The pipe character (|) is usually located above the backslash (\) on your keyboard.
      3. For example: Search **Lien | Levy**.
   ii. **AND (+)**
      1. Use the + (plus character) to find documents with two or more keywords or phrases.
      2. For example: Search **Motion for Summary Judgment + "Denied"**.
5. To search orders by Docket Number:
   a. Enter a specific Docket Number to narrow searches to within a single Docket Number.
6. To search orders by Case title or Petitioner name:
   a. Enter a specific Case title or Petitioner name in the appropriate box.
7. To search orders by Judge:
   a. Choose a specific Judge's Name from the drop-down menu.
   b. Note: the default is all Judges.
8. To search orders by date:
   a. The default is all dates, but you may also choose a custom range of dates.
   b. When custom dates are selected, you must enter a start date, but you may choose to leave off the end date.
9. Total Results
   a. After you click **Search or hit the enter key on your keyboard**, you will see how many search results are shown. In the example below, a Case Title search for Jones returned the first 100 matches. If the order that you are looking for is not in the first 100 matches, try to refine your search by adding additional search criteria (date ranges, a specific Judge, etc.).

b. DAWSON will only load the first 25 results on the page. If you would like to view more results than what initially is displayed, scroll to the bottom of the page and click **Load more**.

TIPS & TRICKS

- Search is NOT case sensitive.
- If there are no matches, you will receive a message that states **"No Matches Found. Check your search terms and try again."**
- Additional help documentation is available on the DAWSON Order search page if needed.

FIND AN OPINION

An opinion is the written determination of a Judge on the issues tried and submitted to the Court for decision. Each day's opinions are posted on the Court's website, www.ustaxcourt.gov. Click on the **Orders and Opinions** menu and select **Today's Opinions**. You can also navigate directly to the page by going here: https://dawson.ustaxcourt.gov/todays-opinions.

If you need to search for an opinion, you can search by a keyword or phrase. In addition, you may narrow your search results by adding a specific Docket Number, Case Title/Petitioner's name, the Judge who issued the opinion, or by including a specific date or date range. You may also filter by opinion type.

HOW TO SEARCH FOR AN OPINION

1. Go to https://dawson.ustaxcourt.gov/
2. Click the **Opinion** tab:

3. Search opinions with a keyword or phrase.
    a. When search is initiated from the keyword or phrase area, DAWSON will include in the search:
        i. The case caption.
        ii. The content of the opinion
        iii. The opinion title.
    b. For exact matches, be sure to include quotation marks around your search term.
        i. For example: Search **"Premium Tax Credit"** for results containing that exact phrase.
    c. Do not enter quotation marks for searches that you do not want exact matches for.

  i. For example: If you enter **Smith** for your search, results will include terms that include **Smith**, as well as **Smithson**.

4. Use Connectors (| , +) with keywords/phrases.
 a. You can use connectors in combination with the exact keyword or phrase search.
  i. **OR (|)**
   1. Use the | (pipe character) to find documents containing one or more of the keywords or phrases.
   2. The pipe character (|) is usually located above the backslash (\) on your keyboard.
   3. For example: Search **"fraud" | "sanctions"**.
  ii. **AND (+)**
   1. Use the + (plus character) to find documents with two or more keywords or phrases.
   2. For example: Search **"in-kind + "distribution" + "IRA"**

5. To search opinions by Docket Number:
 a. Enter a specific Docket Number to narrow searches to within a single Docket Number.

6. To search opinions by Case title or Petitioner name:
 a. Enter a specific Case title or Petitioner name to search for.

7. To search opinions by Judge:
 a. Enter a specific Judge's name.
 b. Note: the default is all Judges.

8. To search opinions by date:
 a. The default is all dates, but you may also choose a custom range of dates.
 b. When custom dates are selected, you must enter a start date, but you may choose to leave off the end date.

9. To search by Opinion Type:
 a. All opinion types are selected by default.
 b. Uncheck the opinion types so that only the type of opinions that you want to search for are left checked.

10. Total Results
 a. After you click **Search or hit the enter key on your keyboard**, you will see how many search results are shown. In the example below, a keyword search for Smith returned the first 100 matches. If the opinion that you are looking for is not in the first 100 matches, try to refine your search by adding additional search criteria (date ranges, a specific Judge, etc.).
 b. DAWSON will only load the first 25 results on the page. If you would like to view more results than what initially is displayed, scroll to the bottom of the page and click **Load more.**

TIPS & TRICKS

- Search is NOT case sensitive.
- If there are no matches, you will receive a message that states **"No Matches Found. Check your search terms and try again."**
- Additional help documentation is available on the DAWSON Opinion search page if needed.

FIND A PRACTITIONER

Any public non-logged in user can search for Practitioners that have a U.S. Tax Court Bar number.

HOW TO SEARCH FOR A PRACTITIONER

1. Go to https://dawson.ustaxcourt.gov/.
2. Click on the Practitioner tab.
3. Search by Practitioner Name or by Practitioner Bar number.

4. Practitioner Name
    1. Input a Name in the Practitioner Name field.
    2. Click the **Search** button.
    3. Results will display in a table. A total number of results will display, along with a paginator if there are more than 100 results.

5. Bar Number
   1. Input a complete Bar number in the field (partial Bar numbers will not return any results).
   2. Click the **Search** button.
   3. If there is a practitioner with the Bar number that you searched for, the practitioner will display in the results.

SCHEDULED TRIAL SESSIONS

Scheduled trial sessions are posted on the Court's website at www.ustaxcourt.gov. Click on the **About the Court** menu and select **Trial Sessions**. You can also navigate directly to the page by going here: https://dawson.ustaxcourt.gov/trial-sessions.

Information about public access to remote proceedings and information about Zoomgov proceedings are available as links on the Scheduled Trial Sessions Page.

Scheduled Trial Sessions that display in the table can be filtered by Proceeding type, Session type, Location, and assigned Judge.

ADDITIONAL RESOURCES

- Terms of Use: https://www.ustaxcourt.gov/dawson-tou/
- Notice Regarding Privacy and Public Access to Case Files: https://www.ustaxcourt.gov/notice-regarding-privacy/
- Frequently Asked Questions: https://www.ustaxcourt.gov/dawson-faqs-basics/
- Guidance for Petitioners: https://www.ustaxcourt.gov/petitioners/
- Low Income Taxpayer Clinics (LITCs): https://www.ustaxcourt.gov/clinics/
- Tax Court Rules of Practice and Procedure: https://www.ustaxcourt.gov/rules/
- Case Related Forms: https://www.ustaxcourt.gov/case-related-forms/

ADDITIONAL SUPPORT

- Still have a question or problem?
    - Email dawson.support@ustaxcourt.gov.
    - No documents can be filed with the Court at this email address.

SYSTEM STATUS

- For information regarding system status, including outages, please visit: https://status.ustaxcourt.gov/.