

United States Tax Court

PUBLIC USER 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 also has a public search feature where the public can search for cases, orders, and opinions that are not sealed.

HOW TO ACCESS DAWSON

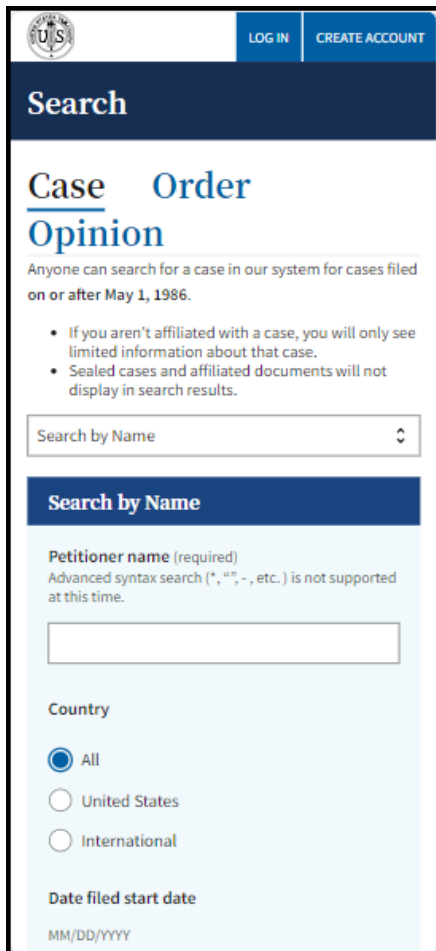
You can access DAWSON from a link on the Court's website (<https://ustaxcourt.gov/>) or by going to <https://dawson.ustaxcourt.gov/>.

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:



The screenshot shows the mobile interface of the DAWSON search system. At the top, there is a navigation bar with the U.S. Tax Court logo on the left and "LOG IN" and "CREATE ACCOUNT" buttons on the right. Below this is a dark blue header with the word "Search" in white. The main content area has a light blue background and features the words "Case", "Order", and "Opinion" in large, bold, blue text. Below these words, a note states: "Anyone can search for a case in our system for cases filed on or after May 1, 1986." This is followed by a bulleted list: "If you aren't affiliated with a case, you will only see limited information about that case." and "Sealed cases and affiliated documents will not display in search results." A search input field is present with the placeholder text "Search by Name" and a dropdown arrow. Below the input field is a dark blue button labeled "Search by Name". Underneath the button, the text "Petitioner name (required)" is displayed, along with a note: "Advanced syntax search (*, @, -, etc.) is not supported at this time." A text input field for the petitioner name is provided. Below this is a "Country" section with three radio button options: "All" (which is selected), "United States", and "International". At the bottom, there is a "Date filed start date" section with the placeholder "MM/DD/YYYY".

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.

The screenshot shows the DAWSON search interface. At the top, there is a logo for the United States Tax Court and the text "Welcome to DAWSON". On the right, there are links for "Log In" and "Create Account". Below this is a "Search" header with three tabs: "Case", "Order", and "Opinion". A note states: "Anyone can search for a case in our system for cases filed on or after May 1, 1986." Below this note are two bullet points: "If you aren't affiliated with a case, you will only see limited information about that case." and "Sealed cases and affiliated documents will not display in search results." The interface is divided into two main search sections: "Search by Name" and "Search by Docket Number". The "Search by Name" section includes a "Petitioner name (required)" field with a note that advanced syntax search is not supported. It also has a "Country" section with radio buttons for "All", "United States", and "International". There are two date fields for "Date filed start date" and "Date filed end date" with calendar icons. The "Search by Docket Number" section includes a "Docket number (required)" field with an example format "123-19" and a "Search" button with a "Clear Search" link.

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 adding Date filed start date, Date filed end date, Country or State. 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.

FIND AN ORDER

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, under "Today's Orders" in "Orders & Opinions". 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.

The screenshot shows the DAWSON search interface. At the top, there is a "Welcome to DAWSON" header with a logo and links for "Log In" and "Create Account". Below the header is a "Search" section with tabs for "Case", "Order", and "Opinion". The "Order" tab is selected. A message states: "Anyone can search for an order in our system for cases filed on or after May 1, 1986." Below this are two bullet points: "If you aren't affiliated with a case, you will only see limited information about that case." and "Sealed cases and affiliated documents will not display in search results." The search area includes a "Search by keyword and phrase" input field, a "Docket number" input field, and a "Case title / Petitioner's name" input field. There are also "Judge" and "Date range" dropdown menus. A "How to Use Search" box provides search syntax: "" for exact matches, "+" for AND, and "|" for OR. A "Search" button and a "Clear Search" link are at the bottom.

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, under “Today’s Opinions” under “Orders & 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**.

Search

Case
Order
Opinion

Anyone can search for an opinion in our system for cases filed on or after May 1, 1986. Any online sourced citations in opinions filed after July 11, 2022 can be viewed directly from the associated docket record.

- If you aren't affiliated with a case, you will only see limited information about that case.

Search by keyword and phrase

Docket number

Case title / Petitioner's name

or

Judge

All judges

Date range

All dates

Include types:
 T.C.
 Memorandum
 Summary
 Bench Opinion (Order of Service of Transcript)

Search
Clear Search

⚠ Displaying the first 100 matches of your search.
 Refine your search by adding search criteria.

Results

100 match(es) shown

| Date | Opinion Type | Case Title | Judge | Pages | Docket No. |
|------|--------------|------------|-------|-------|------------|
|------|--------------|------------|-------|-------|------------|

How to Use Search

"" Include only **exact matches**
 + AND (includes **all** words/phrases)
 | OR (includes **one or more** words/phrases)
 No other commands are supported at this time
[Learn more about searching in DAWSON](#)

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.

ADDITIONAL RESOURCES

- Terms of Use: <https://www.ustaxcourt.gov/tou.html>
- Notice Regarding Privacy and Public Access to Case Files: https://www.ustaxcourt.gov/notice_regarding_privacy.html
- Frequently Asked Questions: https://ustaxcourt.gov/dawson_faqs.html
- Guidance for Petitioners: <https://www.ustaxcourt.gov/petitioners.html>
- Low Income Taxpayer Clinics (LITCs): <https://ustaxcourt.gov/clinics.html>
- Tax Court Rules of Practice and Procedure: <https://www.ustaxcourt.gov/rules.html>
- Case Related Forms: https://ustaxcourt.gov/case_related_forms.html
- Other case related forms: https://ustaxcourt.gov/case_related_forms.html
- COVID-19 Resources: <https://www.ustaxcourt.gov/covid.html>

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/>.