

# United States Tax Court

---

## **PUBLIC USER GUIDE**



## **DAWSON CASE MANAGEMENT SYSTEM**

United States Tax Court

Washington, DC

August 2023

## TABLE OF CONTENTS

Introduction .....	2
What is DAWSON?.....	2
How to Access DAWSON .....	2
Browser Compatibility .....	2
DAWSON is Mobile-Friendly.....	2
What Documents are Viewable Electronically by the General Public?.....	3
Find a Case.....	3
Search by Docket Number.....	3
Search by Name.....	4
Find an Order .....	4
How to search for an Order.....	4
Find an Opinion.....	6
How to search for an Opinion .....	6
Additional Resources.....	9
Additional Support.....	9
System Status .....	9

## 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

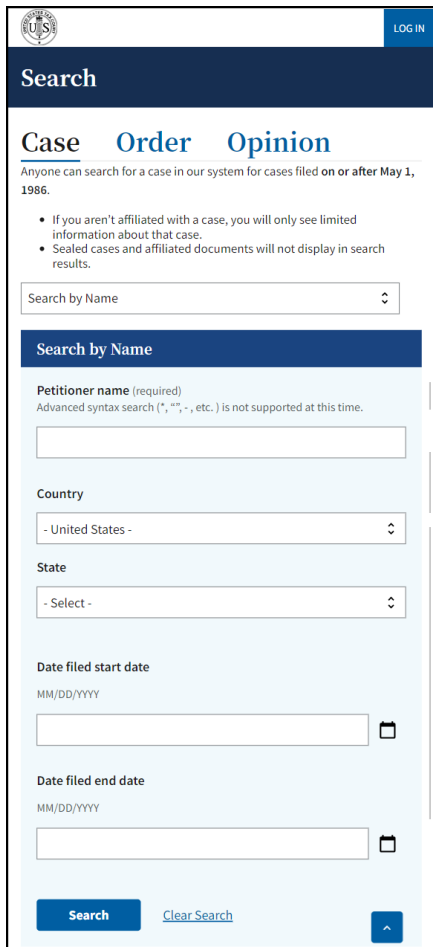
You can access DAWSON from a link on the Court's website (<https://ustaxcourt.gov/>) or by going to <https://dawson.ustaxcourt.gov/>.

### 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 displays the search interface of the DAWSON system. At the top left is the U.S. Tax Court logo, and at the top right is a "LOG IN" button. Below the logo is a "Search" header. Underneath, there are three tabs: "Case", "Order", and "Opinion", with "Case" currently selected. 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." There is a "Search by Name" dropdown menu. Below that is a "Search by Name" section with a "Petitioner name (required)" field and a note: "Advanced syntax search ('\*', '\*\*', etc.) is not supported at this time." There are also dropdown menus for "Country" (set to "- United States -") and "State" (set to "- Select -"). At the bottom, there are two date fields: "Date filed start date" and "Date filed end date", both with a calendar icon. At the very bottom, there are "Search" and "Clear Search" buttons, and a small blue square with an upward arrow.

## 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 'Welcome to DAWSON' page with a 'Search' section. Under 'Search', there are three tabs: 'Case', 'Order', and 'Opinion'. Below the tabs, a note states: 'Anyone can search for a case in our system for cases filed on or after May 1, 1986.' Two bullet points follow: '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 interface is divided into two columns. The left column is titled 'Search by Name' and includes a 'Petitioner name (required)' field with a note: 'Advanced syntax search (\*, ", -, etc.) is not supported at this time.' Below this are dropdown menus for 'Country' (set to '- United States -') and 'State' (set to '- Select -'). There are also date fields for 'Date filed start date' and 'Date filed end date', both with calendar icons. The right column is titled 'Search by Docket Number' and includes a 'Docket number (required)' field with an example: 'Example of docket number format: 123-19'. Both columns have a blue 'Search' button and 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. For the state filter - you will see 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](http://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 header with the U.S. Tax Court logo and the text "Welcome to DAWSON" and a "Log In" link. Below the header is a dark blue bar with the word "Search" in white. Underneath, there are three tabs: "Case", "Order" (which is highlighted with a red box), and "Opinion". Below the tabs, there is a light blue search area. It contains a text input field for "Search by keyword and phrase", a "Docket number" input field, and a "Case title / Petitioner's name" input field. There are also dropdown menus for "Judge" (set to "All judges") and "Date range" (set to "All dates"). A "Search" button and a "Clear Search" link are at the bottom of the search area. To the right of the search area is a "How to Use Search" box with search operators: "" (exact matches), + (AND), and | (OR). A link "Learn more about searching in DAWSON" is at the bottom of the box.

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](http://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/docket\\_search.html#PRIVACY](https://www.ustaxcourt.gov/docket_search.html#PRIVACY)
- Frequently Asked Questions: [https://ustaxcourt.gov/dawson\\_faqs.html](https://ustaxcourt.gov/dawson_faqs.html)
- Guidance for Petitioners: <https://www.ustaxcourt.gov/petitioners.html>
- Low Income Taxpayer Clinics (LITCs): <https://www.ustaxcourt.gov/resources/clinics/clinics.pdf>
- Tax Court Rules of Practice and Procedure: <https://www.ustaxcourt.gov/rules.html#ROPP>
- Sample Forms: [https://www.ustaxcourt.gov/resources/ropp/Appendix\\_I.pdf](https://www.ustaxcourt.gov/resources/ropp/Appendix_I.pdf)
- Other case related forms: [https://ustaxcourt.gov/case\\_related\\_forms.html](https://ustaxcourt.gov/case_related_forms.html)
- COVID-19 Resources: <https://www.ustaxcourt.gov/covid.html>

## ADDITIONAL SUPPORT

- Still have a question or problem?
  - Call 202-521-0700 or email [dawson.support@ustaxcourt.gov](mailto: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/>.