

# RELEASE NOTES

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See below for more information about additional code deployed to DAWSON since its launch on December 28, 2020. For questions or comments email [dawson.support@ustaxcourt.gov](mailto:dawson.support@ustaxcourt.gov).

## September 17, 2023

- Resolved issue preventing some logged in users from viewing documents on the docket record on a mobile device.
- Improved the Advanced Search menu display for logged in practitioners on a mobile device.
- Improved the formatting for longer addresses on the Notice of Receipt of Petition to display appropriately in an envelope window.
- Improved system performance when updating contact information across a large number of cases.

## August 27, 2023

- Resolved display issues impacting Public Orders search for Standing Pretrial Orders and Standing Pretrial Orders for Small Cases.
- Public users and parties to a case can now sort the docket record by date or by document number.
- Improved the docket record display view for mobile devices.

## August 20, 2023

- Practitioners that are associated with a large number of cases no longer receive a 504 error when logging in to DAWSON.

## August 13, 2023

- Updated feature allowing for public visibility of briefs for consolidated groups of cases consistent with [Administrative Order 2023-02](#).

## August 1, 2023

- As identified in [Administrative Order 2023-02](#), certain documents filed on or after August 1, 2023, in non-sealed cases will now be viewable by the public through DAWSON:

- Stipulated Decisions
- Post-trial briefs e-filed by practitioners
- Amicus briefs filed pursuant to Rule 151.1
- Beginning with the Fall 2023 term, an additional Notice of Trial will be served on pro se petitioners approximately a month before the scheduled trial date.

### **July 16, 2023**

- Designation of Counsel to Receive Service has been removed as an option from all eFiling document menus.

### **July 9, 2023**

- Replaced Year fields with Date Filed Start Date and Date Filed End Date fields on the Case Search Page.
- Resolved issue where the “Coming Soon” text would briefly display next to the Order and Opinion header on the DAWSON Case Search page.

### **July 5, 2023**

- Parties to consolidated cases now have the ability to electronically file documents simultaneously in all of the consolidated cases. Entries of Appearance for **petitioner representatives** and Decisions must still be filed in each case separately. Refer to the [DAWSON User Guides](#) for detailed instructions on how to electronically file documents in consolidated cases.
- Parties to at least one case in a consolidated group of cases now have the ability to view documents on the docket record in all of the consolidated cases in the group.

### **April 30, 2023**

- Resolved issue where help text was overlapping the text in the link to download the Corporate Disclosure Statement form.

### **April 25, 2023**

- Added a new checkbox for e-filers to acknowledge that their documents have been redacted in accordance with [Rule 27](#).

## **April 2, 2023**

- Parties no longer receive validation errors when e-filing a Motion for Leave or Motion for Leave to File Out of Time associated with an iteration type document.
- "U.S.A." is no longer displayed as part of a Petitioner's address in the envelope window for paper service.

## **March 26, 2023**

- Parties can now indicate that something is the n<sup>th</sup> version when e-filing certain documents (e.g., Fifteenth Amended Petition, etc.).

## **March 19, 2023**

- Added "Motions" as an option to the Docket Record filter.
- Updated DAWSON to reflect changes to the Tax Court Rules of Practice and Procedure effective March 20, 2023.
- Improved login efficiency for users associated with a high number of cases.

## **March 5, 2023**

- Consolidated case icons have been updated.

## **January 8, 2023**

- Resolved issue preventing mobile DAWSON users from using the docket record's sorting and filtering features.

## **December 4, 2022**

- The Sort By filter display on the docket record view now retains the correct filter selection when logged in users navigate to different views within a case.

## **November 20, 2022**

- Logged-in Petitioners can now search for other cases by docket number from the My Cases screen without needing to log out.
- Resolved issue that impacted printing the docket record in consolidated cases.

## **November 1, 2022**

- Transcripts less than 90 days from the date of the proceeding no longer display a hyperlink.

## **October 30, 2022**

- Parties to case can now see the Consolidated Cases card on the Case Information Overview screen of their case(s) if any of their cases are part of a consolidated group.

## **October 16, 2022**

- The docket record can now be filtered so that users can view only Orders on the docket record.

## **September 18, 2022**

- The docket record can now be filtered so that parties to a case can view only those docket entries coded with exhibit-related event codes.
- The Today's Orders page now sorts orders processed in consolidated cases appropriately.

## **August 21, 2022**

- Corrected rules reference on the Notice of Receipt of Petition

## **August 14, 2022**

- Updated the text on the Opinion Search page to reflect all Online Cited Sources in opinions after July 1, 2016, can be viewed on the associated docket record.

## **July 17, 2022**

- Resolved issue where Practitioners experience a blank white screen when searching for a sealed case by docket number.

## **July 10, 2022**

- Any online sourced citations in opinions filed after July 11, 2022, can now be viewed directly from the associated docket record.

## **June 12, 2022**

- Added additional help text regarding how to gain eAccess to existing cases and how to pay the filing fee to the initial screen that a petitioner sees when first registering for an account.

## **June 5, 2022**

- Coversheets for Notice of Change of Email Address, Notice of Change of Telephone Number, and Notice of Change of Address now include the docket index entry number of the document.

## **May 15, 2022**

- Cover sheets now include the docket index entry number of the document (e.g., the petition would have a "Document No. 1" on the coversheet).

## **May 5, 2022**

- The "Filed By" value for private practitioner e-filed case access documents now reflect the name of the actual filer, not the party they represent.
- If a pro se petitioner's requested place of trial has a low income taxpayer clinic available, a notice will now be automatically appended to the Notice of Receipt of Petition and the Notice Setting Case for Trial.

## **March 27, 2022**

- Implemented style change to Orders generated in DAWSON to conform to the Court's new style guide requirements.

## **March 6, 2022**

- Improved document upload process
- Improved formatting of the title "Notice of Change of Email Address" on the docket record

## **January 9, 2022**

- Improved consistency for headers across multiple-page orders

## December 27, 2021

- Implemented opinion search for public users.
  - Includes keyword and phrase search.
  - Includes ability to find exact matches with "" (quotation marks) ex: "Premium Tax Credit".
  - Includes ability to combine two or more keywords or phrases with the + (plus sign) ex: "fraud" + "sanctions".
  - Includes ability to find documents with one or more keywords or phrases with the | (pipe character) ex: "fraud" | "sanctions" [Note: this search will return documents with the words fraud or sanctions].
  - Includes ability to filter by date, judge, case title, petitioner name, or docket number.
  - Includes ability to filter by opinion type.

## December 19, 2021

- Updated the Notice of Receipt of Petition form.
- Added Motion to Proceed Remotely to the dropdown list of available documents.
- Improved system time-out function to minimize disruptions during active use.

## December 13, 2021

- Implemented Order search for public users
  - Includes keyword and phrase search
  - Includes ability to find exact matches with "" (quotation marks) ex: "innocent spouse"
  - Includes ability to combine two or more keywords or phrases with the + (plus sign) ex: "collection due process" + remand
  - Includes ability to find documents with one or more keywords or phrases with the | (pipe character) ex: Lien | levy [Note: this search will return documents that contain the words "lien" or "levy"]
  - Includes ability to filter by date, judge, case title, petitioner name, or docket number
- Petitions and other documents with form fields now upload correctly for all browsers

## **November 10, 2021**

- Petitioner service preference and email address update correctly after a petitioner gains eAccess to a previously-started case.

## **October 19, 2021**

- A Notice of Change of Email Address will now be generated when a party's email is first added to DAWSON, or an existing address is changed.

## **October 11, 2021**

- Parties can now e-file documents in cases closed longer than 6 months.

## **September 19, 2021**

- Parties can no longer be served documents in a case if the petition is not yet served.
- DAWSON can now be placed in Maintenance Mode if there is ever a need for system downtime.

## **August 29, 2021**

- Removed Notice of Change of Address, Notice of Change of Phone Number, and Notice of Change of Address and Phone Number from documents that may be electronically filed [Note: User should update address and/or phone number within DAWSON]

## **August 15, 2021**

- Improved deployment processes
- Improved service process

## **July 18, 2021**

- Improved error messaging and logging for application failures.
- Improved phone number formatting.
- Improved consistency of served party code display on docket record.

## **July 11, 2021**

- Improved alignment of document links.

- Removed the deployed timestamp on startup.
- Improved link to view practitioner information within case.

### **July 1, 2021**

- eAccess is now available to all petitioners, intervenors, and participants.
- Improved format of printable docket record.

### **June 23, 2021**

- Improved parties' display on the Review Your Filing screen.
- Improved keyboard navigation.

### **June 22, 2021**

- Improved validation on consolidated cases.

### **June 19, 2021**

- Improvements made to the user interface:
  - "Petitioner", "Respondent", and "Other" tabs under Case Information have been combined into a one "Party" tab.
  - Counsel is now listed on the same screen as the party they represent.
  - Intervenor/Participant subtab will only appear if there is an intervenor or participant on the case.
  - eAccess is now available for secondary petitioners.
- Improved consistency with respect to Entered & Served date on all dispositive documents.

### **June 10, 2021**

- Improved pagination for eFiled documents.

### **June 6, 2021**

- Added "Not Served" indicator on Document Detail for unserved Petitions viewed on mobile devices.
- Revised the Review Your Case screen for disclosure cases so that "Disclosure1" now reads "Disclosure".
- Added scrolling for eFiling a document.



- Revised Certificate of Service date format on printable Receipt of Filing.
- Revised capitalization on Docket Number search for mobile devices.
- Revised eFiling success message styling.
- Improved validation messaging from shifting submit buttons on advanced case search.
- Changed petitioner address font on Notice of Receipt of Petition.
- Public Docket Record now populates served Parties column.

### **May 1, 2021**

- Improvement: Increased maximum character count for the title of a lodged document submitted with a Motion for Leave.

### **April 21, 2021**

- Practitioners can now update their firm name.

### **April 18, 2021**

- Improved accessibility for screen-readers.
- Implemented logic to ensure that Corrected and Revised Transcripts are viewable to the parties 90 days after the proceeding.

### **April 11, 2021**

- Improvement: Receipt of Filing now displays the accurate Eastern Standard time the document was filed.

### **March 28, 2021**

- Improvement: Today's Orders can be sorted by time served (oldest to newest and vice versa) and page count (highest to lowest and vice versa).

### **March 20, 2021**

- Improvement: Transcripts with trial/hearing dates more than 90 days ago are visible to parties.

## **March 7, 2021**

- Improvement: The Court can provide petitioners with electronic access to their existing cases. Petitioners should submit a request to [dawson.support@ustaxcourt.gov](mailto:dawson.support@ustaxcourt.gov) and a letter with additional information will be mailed to them.
- Improvement: The Printable Docket Record now includes counsel information for both parties.
- Users can now preview PDF documents that are larger than 2MB before eFiling.

## **February 22, 2021**

- Improvement: Petitioners and practitioners can change the email used for login and service through their DAWSON account.
- Improvement: Bench Opinions now display as part of Today's Opinions.
- The DAWSON application itself now provides a link to these release notes. See "What's New in DAWSON" in the footer next to the link for "Frequently Asked Questions".

## **January 31, 2021**

- Electronic signatures visible in all PDF previews.
- Improvement to public docket record display of consistent event codes, filings, and proceedings:
  - All lodged documents show on the Docket Record with the event code of MISCL.
  - Parenthetical text (i.e. Attachments, Certificate of Service, Objections) now display as part of the Filings and Proceedings for all views of the Docket Record.

## **January 25, 2021**

- Improvement: Text fields
  - Document free text fields can now accept up to 1000 characters, and will show a helpful error message when the limit is reached.
  - The complete document title now accepts up to 3000 characters total, and will inform the user when the limit is reached.
- Left-align titles that expand to multiple lines on the "Today's Orders" table.

## **January 17, 2021**

- Improve consistent application of cover sheets.
- Improve accuracy of page counts shown on Docket Record.

## **January 10, 2021**

- Implement posting of Today's Orders.
- Improve mobile scrolling for Printable Docket Record.
- Allow petitioner names with special characters (') in case search.
- Improve mobile viewing of PDFs on the "Review Your Case" screen.