

Order Search

Research insights

Interviewers



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Who we spoke to

In an effort to understand how our different user types would expect a new search feature to be implemented, we interviewed a total of 14 ranging from Court Clerks to Attorneys.

We don't anticipate search to be implemented differently per each, however we may find need of different default views or save options depending on the user.

“ I do really miss the order search function, so thanks for working on that ”



2 Assistant Deputy Counsels

Manage cases that are within the General Docket



2 Chambers Administrators

Manage cases and draft documents for their judges



3 Judges

Manage cases and draft documents associated with their chambers



4 Attorneys

Draft documents to file at the Court and perform legal research



3 Law Clerks

Draft documents for their judges and perform legal research

Search Relevancy

What we heard

Search results labeled relevant are either abstract, or proprietary. Users rarely anticipate initial results to be the most relevant or useful.

What we think

There are very few critical differences between the established search platforms. We can maintain an impression of industry standards by not introducing new patterns. Also, if they find what they're looking for, then it's relevant.

What we recommend*

Leveraging the visual and interactive approach from other known industry search systems will lessen the learning curve and place the focus on resultsets, rather than UI. This, in turn, will cover half the challenge as the "system" itself will now appear relevant.

*We expect additional discovery work as more unknowns are discovered.

The screenshot shows a search interface for tax court cases. At the top, there are filters for 'Court Cases' and 'Tax Court Cases'. Below that, a sidebar lists 'Opinion types' like 'Court Division Opinions' (13) and 'Court Memorandum' (8). The main content area displays a list of 13 results, with the first one being 'Mainstay Business Solutions v. Commissioner of Internal Revenue' (United States Tax Court, March 04, 2021). The results are sorted by date, with a 'Sort' dropdown menu.

Ideas for:

Feedback

- Track search usage
- Implement in-app feedback

“ Research is a crap shoot ”

Search Relevancy

TECHNICAL CONSIDERATIONS

We'll need to address

- how far back we can pull results
- how to boost results (what makes a result *more* or less relevant)
- making use of headnotes

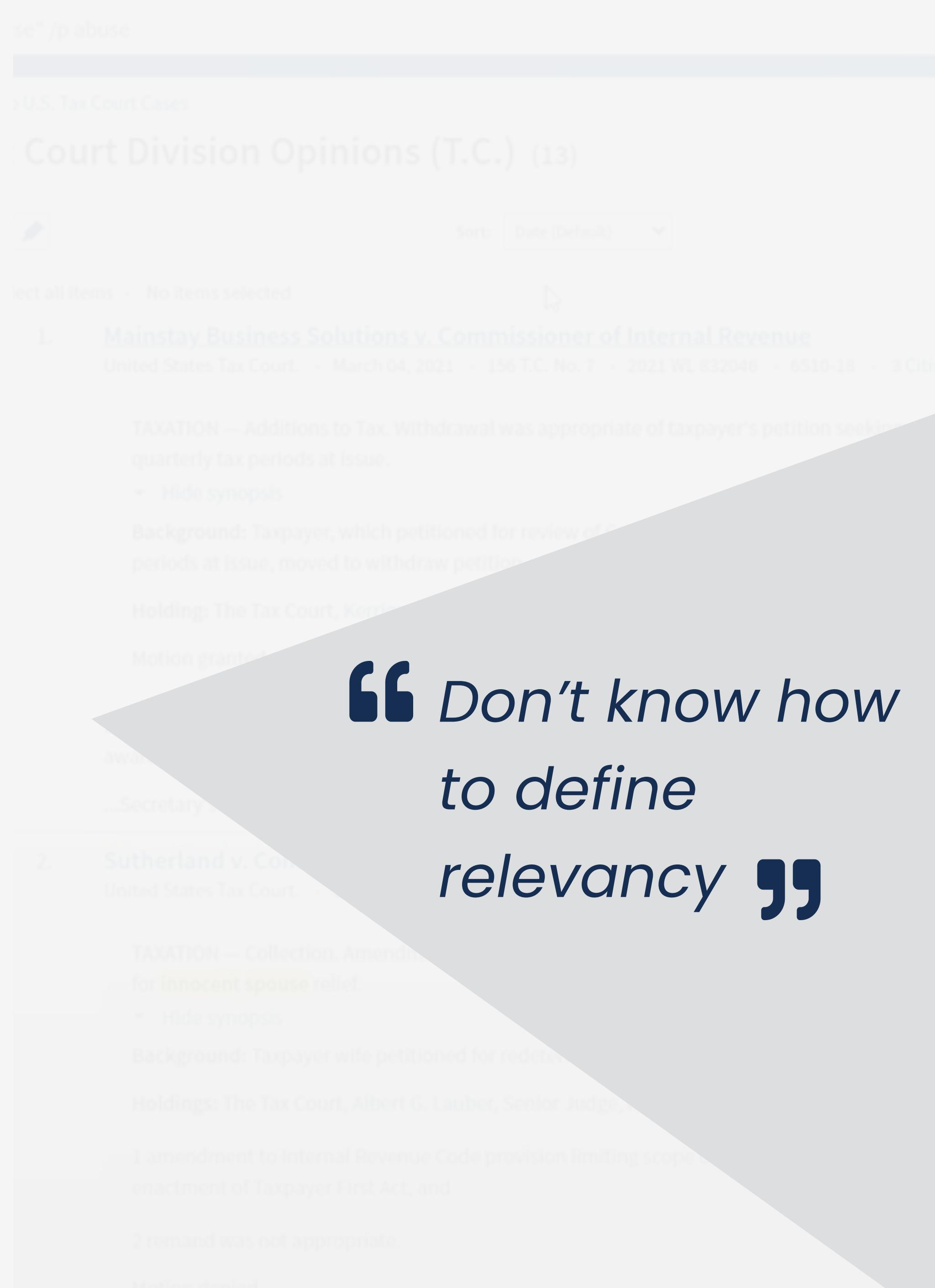
Differences in Natural Language and Boolean Search

Natural language

- familiar to novice to advanced users
- results will be more difficult to define and anticipate
- used for broader or ambiguous search - browsing

Boolean search

- must know how to use the syntax
- used for very targeted search
- can produce very specific results
- user has control (explicitly communicates what they want) but they have to use the syntax correctly



Search Navigation and Files

What we heard

Users are typically looking for PDFs to serve as source documentation and serve as the basis for new documentation. Workflows include mostly copying and pasting, with the added need to correct formatting and removing unnecessary elements (names, dates, etc.).

There are unfortunately some older generation PDFs or PDFs that are simply scans. The text in these files can't be accessed directly, requiring users to retype by hand. Today, some users are saving soft or hard copies of files to reference later.

Dawson dynamic URLs make bookmarking a challenge.

What we think

These are professionals who will create workflows that best suit them, regardless of the design intent. By limiting interaction standards, we increase the likelihood of unnecessary workarounds.

Background: taxpayer, which petitioned for review of Commissioner of Internal Revenue's final audit report for tax years 2010-12, and for periods at issue, moved to withdraw petition.

Holding: The Tax Court, Kerrigan, J., held that withdrawal of petition was appropriate.

What we recommend*

A system that is as unobtrusive and flexible as possible and allows users to make full use of standard browser functions should result in an increase of satisfaction and productivity. Bookmarking, using CTRL + F, should not be limited by design.

Introducing document types as part of a resultset would be helpful in the short-term. Long-term, possibly consider standardizing all to HTML.

Background: The Tax Court, Albert G. Lauber, Senior Judge, held that amendment to Internal Revenue Code provision limiting scope of Tax Court review was invalid under the Taxpayer First Act, and

*We expect additional discovery work as more unknowns are discovered.

Search Navigation and Files

TECHNICAL CONSIDERATIONS

We'll need to address

- Unstable hyperlinks for document PDFs
- PDF vs. image files for legacy documents
- User session-related challenges? (recent or saved searches)

The screenshot shows a digital document viewer with a search bar at the top. Below the search bar is a navigation menu with options like 'Home', 'Search', 'Opinions', 'About', and 'Help'. The main content area displays a list of court opinions. At the top of the list is an opinion titled 'Mainstay Business Solutions v. Commissioner of Internal Revenue' from the United States Tax Court, dated March 04, 2021. The list continues with other opinions, such as 'Sutherland v. Commissioner' from the same court on September 14, 2020. The interface includes standard file operations like 'Select all items', 'Print', 'Copy', and 'Save'.

“ must be able to print, share, extract text ”

Interactivity & UI

What we heard

Result manipulation via filters and sorting are the cornerstone of search effectiveness.

What we think

This will be the key to giving them a search feature they want to use when they can't generate new documents or simply require a reference to cite. They need to be confident we've served up what they're looking for, and they just need to eliminate the noise.

What we recommend*

Begin with bulletproof sorting and filtering of any resultset, in-line with user expectations. If we nail these features first, the moderate to advanced search capabilities will be forgiven for us to take our time to implement.

*We expect additional discovery work as more unknowns are discovered.

Ideas for:

Crafting relevant results

- Boolean search options (AND, OR, NOT)
- Advanced syntax (proximity search, root expander)
- Search builder
- Natural language search

Error prevention and recovery

- Contextual instructions / tooltips

The screenshot shows a search interface with a blue header bar. Below it, there's a section labeled "Cases" with a dropdown menu set to "Select a different content type". The main area contains several input fields for filtering search results:

- Terms**:
 - All of these terms: Add
 - Any of these terms: Add
 - Exactly this phrase: Add
 - Excluding these terms: Add

Interactivity & UI

TECHNICAL CONSIDERATIONS

We'll need to address

- Making both natural language and Boolean searches accessible to all users
- special characters - Boolean search capabilities will be required
- numbers in keywords
- spaces in keywords
- quotations
- synonyms & alternative words
- variations
- abbreviations

Competitor Search platforms we reviewed:

- Supreme Court
- State of Texas
- Blackstone
- West Law
- Lexis Nexis
- Bloomberg
- Tax Notes

The screenshot displays a complex legal search interface with several panels:

- Connectors and Expanders:** A table mapping symbols to Boolean operators.
- Content types:** A sidebar listing categories like Overview, Tax Court Division Opinions (13), Tax Court Memorandum Opinions (87), Tax Court Summary Opinions (25), and All results (125).
- Search and Filter:** A main search area with fields for KEYWORDS (Enter your keywords), CITATIONS (Ex: 531 U.S. 98), COURTS (Select Courts), TOPICS (Select Topics), INDUSTRIES (Select Industries), PARTY, CASE NAME, JUDGE, and ATTORNEY OR FIRM.
- Advanced Filtering:** A sidebar with sections for Clear Selections, View by Practice Area (Federal selected), Narrow by Collection (Cases (66)), FILTER YOUR RESULTS (Date, Date range, Date after, Date before, Date from, Date to, Date exact), and specific filters for Federal Circuit (Other Federal Courts (49), Ninth Circuit Courts (5), Sixth Circuit Courts (3), Eleventh Circuit Courts (3), Seventh Circuit Courts (2)) and Court (U.S. Tax Court (49), U.S. Court of Appeals for the Ninth Circuit (5)).

Order Templates

What we heard

The reason for nearly all searches is to find existing copy to begin writing a new order.

What we think

We can eliminate the need for *most* searches by allowing users to generate default copy on their own and save their own starting points.

What we recommend*

User defined, dynamic document templates. By allowing users to begin with a baseline document that they craft themselves, along with efficient ways of customizing them, we anticipate that the reliance on search for the purpose of order writing will gradually decrease, freeing up time for other tasks.

*We expect additional discovery work as more unknowns are discovered.

order

U.S. Tax Court Cases

Court Division Opinions (T.C.) (13)

order

Ideas for:

Order creation

- Document generator
- Wordpress-like shortcodes to insert user defined copy
- Contextual search and ability to add content from within the editor.

Order Templates

TECHNICAL CONSIDERATIONS

We'll need to address

- user profiles
- user saved data management

Search

U.S. Tax Court Cases

Court Division Opinions (T.C.) (13)



Select all items — No items selected

- 1 Mainstay Business Solutions v. Commissioner of Internal Revenue
United States Tax Court — March 04, 2021 — 2021 WL 632046 — eCite 10-18 — 3 Citations

TAXATION — Additions to Tax. Withdrawal was appropriate of taxpayer's petition seeking review of quarterly tax periods at issue.

* Hide synopsis

Background: Taxpayer, which petitioned for review of Commissioner's determination of quarterly tax periods at issue, moved to withdraw petition.

Holding: The Tax Court denied the motion.

Motion denied.

...Review

award determined

...Secretary's failure to act

2 Sutherland v. Commissioner

United States Tax Court

TAXATION — Collection. Amendment to motion for innocent spouse relief.

* Hide synopsis

Background: Taxpayer wife petitioned for redetermination of tax liability.

Holdings: The Tax Court, Albert G. Lauber, Senior Judge, held that:

1 amendment to Internal Revenue Code provision limiting scope of Tax Code enacted by the Taxpayer First Act, and

2 remand was not appropriate.

Motion denied.

**“ like a puzzle ...
pick and choose
language from
different orders ”**