

## Instructions For Final Status Report

The **Final Status Report** form is a simple, fill-in-the-blanks form that a party should submit to the Tax Court and to the opposing party to report a settlement of a case not previously reported to the Court or to provide final estimates of the likelihood and/or length of trial not previously reported to the Court.

Each party to a Tax Court case is required by the Standing Pretrial Order (issued in each case with the Notice calendaring the case for trial) to submit to the Court, no later than 14 days before a calendar call, a Pretrial Memorandum which includes an estimate of "Probable settlement", "Probable trial", or "Definite trial" and an estimate of the trial time. A party should use the **Final Status Report** to inform the Court of any final changes in information reported in the party's Pretrial Memorandum.

A copy of the **Final Status Report** form and instructions will be served on the parties with a Notice Setting Case for Trial. The paper version of the **Final Status Report** may be filled out and submitted to the Court by mail or faxed to 202-521-3378. Alternatively, a party may access and submit to the Court an electronic version of the **Final Status Report** by entering the docket number for the case and the taxpayer's ZIP Code (below), and entering the information requested in lines 1 through 5 of the form. When the form is completed, it may be submitted to the Court by clicking the "Submit" option at the bottom of the page. After the form is submitted to the Court, the sender may print a copy of the **Final Status Report** which will include a confirmation number.

A **Final Status Report** submitted electronically or by fax must be received by the Court no later than 3 p.m. eastern time on the last business day before the calendar call. A **Final Status Report** also may be mailed if sent in time to be received by the Court on the last business day before the calendar call.

A **Final Status Report** must be promptly submitted to the opposing party. A **Final Status Report** may be submitted to the opposing party by mail, e-mail, or fax, and a copy of the report must be given to the opposing party at the calendar call if the opposing party is present.

The Court expects that the **Final Status Report** normally will be received by the Court during the last few business days before the first day of the trial session to ensure that the Court has the latest information; however, a **Final Status Report** may be submitted at any time earlier to report that a case has settled.

The submission of a **Final Status Report** does not (1) excuse a party from attending the calendar call without express permission from the Judge assigned to the Trial Session; or (2) serve as a substitute for properly executed decision documents.