

## Survey of Patent Applicants' Filing Software Usage and Tools

- 1. Please indicate the category of filer that best describes you:**
  - a. Attorney/agent at a patent law firm
  - b. Non-attorney employee of a patent law firm
  - c. Attorney/agent at a corporation
  - d. Corporate employee/patent filer
  - e. Independent inventor
  
- 2. Please indicate the items that you have filed electronically with the USPTO or another patent organization. (Select all that apply)**
  - a. All initial patent application documents
  - b. Provisional patent application documents
  - c. Follow-on papers
  - d. Pay fees online
  - e. Fillable forms
  - f. E-Petition forms
  - g. Auto Grant Petitions
  - h. PCT Applications
  
- 3. Please indicate the approximate number of NEW (utility) patent applications filed by your company or firm annually. Include paper and electronic filings.**
  - a. 1-100
  - b. 101-500
  - c. 501-1000
  - d. More than 1000
  
- 4. Select all users who submit patent application documents in your organization?**
  - a. Attorney/patent agent
  - b. Paralegal or legal secretary
  - c. Finance personnel
  - d. Other (Please Specify)
  
- 5. Do you currently use a docketing system or a case management system?**
  - a. Yes
  - b. No
  
- 6. If Yes, which system(s) do you use?**
  - a. Amicus Attorney
  - b. Anaqua
  - c. Cardinal Intellectual Property
  - d. CPA Global (Computer Patent Annuities)
  - e. CPI (Computer Packages Inc.)
  - f. CompuLaw
  - g. Dennemeyer
  - h. FileMaker
  - i. First to File
  - j. FlexTrac
  - k. GSI
  - l. IAG (Innovation Asset Group)
  - m. IPDAS

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- n. IPSS (Intellectual Property Solutions)
- o. ipWorkflow
- p. Knowligent
- q. Lecorpio
- r. LegalStar
- s. LexisNexis
- t. O P Solutions
- u. Patrafee
- v. Patrix
- w. PerfectLaw
- x. Thompson
- y. UNYCOM
- z. Custom System (Developed in-house)
- aa. I Don't Know
- bb. Other (Please Specify)

### **7. Select all software programs used to author patent applications.**

- a. Microsoft Word 2010/2007
- b. Microsoft Word (pre-2007)
- c. Corel WordPerfect Office
- d. Adobe Professional
- e. Commercial IP management software
- f. Google Docs
- g. OpenOffice Writer
- h. IBM Lotus Symphony Documents
- i. Zoho Office Writer
- j. ThinkFree Office Write
- k. LibreOffice Writer
- l. Apple iWork Suite Pages
- m. SoftMaker Office Textmaker
- n. Kingsoft Office Writer
- o. RagTime Solo
- p. Windows Live Office (Doc.com)
- q. Office 365
- r. Adobe Buzzword
- s. I Don't Know
- t. Other (Please specify)

### **8. Please select the operating system used to author patent applications.**

- a. Windows 7
- b. XP Pro
- c. XP Home
- d. Win 2000
- e. Mac Tiger OSX 10.4
- f. RedHat 9.0
- g. I Don't Know
- h. Other (Please specify)

### **9. Select all specialized software tools used to author patent applications?**

- a. Chemdraw
- b. Mathematica
- c. FastSeq
- d. PatentIn

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- e. Checker
- f. Cad/Cam
- g. Other (please specify)

### **10. Please rate your organization's willingness to adapt to new technologies and processes.**

- a. Very reluctant to adapt
- b. Adapts only when the majority of other users have adapted
- c. Adapts with reasonable confidence that the new technology is stable
- d. Quick to embrace new technologies and processes.
- e. We create custom technologies and processes

### **11. Do you use EFS-WEB Fillable forms?**

- a. Yes
- b. No

### **12. If Yes, select all that apply**

- a. ADS
- b. IDS

### **13. If No, please select why EFS-WEB fillable forms are not used.**

- a. Difficult to navigate within the form
- b. Difficult to add, modify or delete data
- c. Unable to integrate with DMS systems to import/export data
- d. Wet signature required by the business
- e. Form field limitations (e.g. character limit, special characters)
- f. Use forms created internally within our organization
- g. Other (please specify)

### **14. Do you use the EFS-WEB e-Petitions?**

- a. Yes
- b. No

### **15. If Yes, select all that your organization has submitted**

- a. Petition to Make Special Based on Age (37 CFR 1.102)
- b. Petition to Accept Unintentional Delayed Payment of the Maintenance Fee (37 CFR 1.378(c))
- c. Request for Withdrawal as Attorney or Agent of Record (37 CFR 1.36)
- d. Petition to Withdraw from Issue after Payment of the Issue Fee (37 CFR 1.313(c)(1) or (2))
- e. Petition to Withdraw from Issue after Payment of the Issue Fee (37 CFR 1.313(c)(3))
- f. Petition to Withdraw from Issue after Payment of the Issue Fee (37 CFR 1.313(c)(1) or (2) with Assigned Patent Number)
- g. Petition to Withdraw from Issue after Payment of the Issue Fee (37 CFR 1.313(c)(3) with Assigned Patent Number)
- h. Petition to Accept Late Payment of Issue Fee - Unintentional Late Payment (37 CFR 1.137(b))
- i. Petition for Revival of an Application based on Failure to Notify the Office of a Foreign or International Filing (37 CFR 1.137(f))
- j. Petition for Revival of an Application for Continuity Purposes Only (37 CFR 1.137(b))Petition

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**16. If No, please select why your organization has not used the EFS-WEB e-Petitions.**

- a. Not aware of the e-Petitions functionality
- b. Requires the attorney to e/sign the petition form
- c. Coordinate time with the attorney to sign the e-petition
- d. Inability to save the e-petition for future submission
- e. Use forms created internally within our organization
- f. Have tried but failed eligibility requirements
- g. Other (Please specify)

**17. Are you willing to participate in further questionnaires and discussions about future USPTO e-filing requirements?**

- a. Yes
- b. No

**18. If yes, please provide your contact information below.**

This information collection contains requirements subject to the Paperwork Reduction Act (PRA). Notwithstanding any other provisions of the law, no person is required to respond to, nor shall any person be subject to penalty for failure to comply with, a collection of information subject to the requirements of the PRA, unless that collection of information displays a currently valid OMB Control Number. The estimated response time for this collection is 12 minutes. The response time includes the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information.