

eCommerce Outreach Event

Audience of 50 – 100 Paralegals at USPTO Denver, CO Office (January 29, 2015)

eMod Overview

The United States Patent and Trademark Office (USPTO) is modernizing its eCommerce systems and will be conducting a focus session to gather feedback for the Electronic Filing System (EFS-Web) and the PAIR systems.

eMod Forum at USPTO Denver, CO Office (format)

This event is being hosted by the USPTO at their Denver, CO satellite office. The event is scheduled with 50 – 100 legal secretaries and administrators to discuss current eCommerce initiatives and gather their valuable feedback in the improvement of USPTO tools. Forum length is currently at 2 to 2.5 hours.

The eCommerce Team plans to share information and coordinate a focus session, to confirm and gather additional feedback about current initiatives and improvements. The purpose of the focus sessions is to collect suggestions to enhance the way customers file and view patent information. With the feedback collected, the USPTO can help simplify customer workflow and improve the user experience of patent filers.

Approval Information Summary

- Facilitators: eCommerce Division Team and 4 Denver, CO staff to assist
- Format: Informational, Focus Session, and Survey (Information and Demos Provided)
- Participants: 50 – 100 legal secretaries and administrators
- Duration: 2 – 2.5 hours
- Location: USPTO Denver, CO Satellite Office (1961 Stout Street, Denver, CO 80294)
- Questions: Both focus session and survey questions can be found in the following pages

Denver, CO eCommerce Outreach Agenda

eMod Focus Session

1/29/2015

9:30 AM – 12:00 PM (TBD)

Attendees: USPTO eCommerce Team and Paralegals

2 minutes	Welcome and Introduction (Lisa) <ul style="list-style-type: none">• Reason for being here today• Agenda and Introduce Facilitators
10 minutes	EFS-Web Common Pitfalls Presentation (Jeff and Rich)
10 minutes	Most Frequent EBC Questions and Answers (Rich) <ul style="list-style-type: none">• Pulled from EBC Statistics (PAIR, Customer Number, and Digital Certificates)
10 minutes	Paralegal Best Practices Open Discussion (depending on advertising and focus) <ul style="list-style-type: none">• Amongst the entire group, passing the microphone, notes, or advance emails• Question and answer if necessary
10 minutes	eMod and Patent Application Data Overview (Lisa and Rich) <ul style="list-style-type: none">• Overview presentation of eMod and Patent Application Data (Dawei)• Current status<ul style="list-style-type: none">◦ Planned deployments for this fiscal year???• Goals and initiatives• Stakeholder benefits (what eMod means to the community)• Goals for today's focus session
80 minutes	Focus Session <ul style="list-style-type: none">• Customer Service• Publication Ready Data• eGrant• PAIR Administration• Text Submission Concerns• Text Submissions Options• Additional Information/Feedback
5 minutes	Survey
10 minutes	Audience Q&A
10 minutes	Closing Out <ul style="list-style-type: none">• Feedback and its value to the tools• How to get additional assistance or answers; where to provide additional feedback<ul style="list-style-type: none">◦ IdeaScale and eMod inbox (handout)• Next Steps and Thank You

***Take-home materials: eMod IdeaScale Flyer**

eMod Focus Session Questions

Denver, CO with Paralegals

1. Customer Service
10 Minutes

Brief overview of feedback collected on this topic at the previous focus session

How can the USPTO improve in their customer service?

2. Publication Ready Data - REV
10 Minutes

Show mock-up.

If there is a display of publication ready data (i.e., data currently printed on the Front Page Pre-Grant Publication and/or Front Page Patent Grant), would you review it for accuracy?

- a. If given the opportunity, would you update it?
- b. What challenges/ concerns do you anticipate?
- c. What benefits would you expect?

3. eGrant
5 Minutes

(relate to publication ready data information and graphics)

- a. In lieu of a single, official ribbon patent grant copy, would you favor an official electronic patent grant with the ability to print as many copies as needed?
- b. If provided the official electronic patent grant, would you order any copies?

4. PAIR Administration (#2) - REV
5 Minutes

USPTO is planning to automate the following administrative tasks through Private PAIR 1) New Customer Number Request, 2) Change Correspondence/Maintenance Fee Address, 3) Change Entity Status

Are there other routine PAIR tasks you would like to see automated?

5. Address Concerns about Text Submission (#1)
10 Minutes

Security

Give feedback overview from last few sessions: Concerns about sending text but would like to receive text to work with – relationship process so that the USPTO can send in a format that is received

Address concerns about applicants sending texts (USPTO isn't changing your data and proof – show screenshots of the program that allows checking and reassures you that we're not doing anything to your application).

Additional feedback/questions?

Metadata

Give feedback overview from last few sessions: Metadata being sent to the USPTO is a concern.

Address concerns by giving brief tutorial about how to clean the document before submission. Also, give a brief explanation/demo about how EFS-Web can show warnings about Word documents containing track changes, etc.

Additional feedback/questions?

6. Text Submissions Options (#3) - REV
15 Minutes

Give feedback overview from last few sessions

Discuss various options that could be used, showing examples of image-based PDF (current) and other options with structured text (PDF + Text, Word, Copy/Paste to web screens, Template form). Demo CAF structure (curly braces). Also show an example similar to WIPO where the PDF and Word document are submitted together and also converter tool where it takes the word document and converts it to a PDF and XML.

The USPTO would like to receive and process text information from electronically filed patent applications. Using text data will improve the processing of patent applications and allow the use of additional technologies to assist in prosecution.

Text submissions could be in a word processing document, such as .docx files used by Microsoft Word. Docx's official name is Office Open XML. It is an open standard that was created by Microsoft, which is recognized by software standards organizations such as ISO and IEC. Because it is an open standard, .docx is not exclusive to Microsoft Word, and can easily be used by other word processors, such as Google Drive, Apple Pages, Open Office, and WordPerfect.

Text submissions could also be with text-based PDF documents. Text-based PDFs are usually created electronically from a word processor (like Microsoft Word) and are not made with a scanner.

Questions

- a. Which option do you prefer (polling)?
- b. What are your thoughts on the various options?
- c. Do you have any questions/concerns?

7. Additional Information
15 minutes total

Question - 10 Minutes

Ask group for five additional changes they would recommend to improve how they submit, view, and receive their patent information?

Voting - 5 Minutes

Ask group to prioritize and pick the most important recommendation.

If you have questions regarding these proposed processes, or suggestions for enhancements — please, send an e-mail to our eCommerce Modernization mailbox at: emod@uspto.gov