

UNITED STATES
PATENT AND TRADEMARK OFFICE



Training and Maintaining Excellence in the U.S. Patent Corps



MEETING SERIES

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UNITED STATES
PATENT AND TRADEMARK OFFICE ®

Preparing for excellence

Patent quality is a shared responsibility between the USPTO and our stakeholders.

- Office of Patent Training (OPT)
- Office of Patents Stakeholder Experience (OPSE)

Excellence through training

For Patents employees, specifically:

- Newly hired examiners
- Experienced examiners
- Administrative staff and their managers
- Leadership development
- General employee development

Training at the USPTO

- Development of consistent materials across the organization.
- Use of holistic approach to learning that integrates academic practices (e.g., Bloom's Taxonomy below) to focus on retention and application of concepts, as well as critical thinking.



New examiners



- No legal training is required prior to being hired.
- Must have degree in STEM field.
- Patent Training Academy (PTA) is designed to provide the legal training an examiner needs to do the job.

Experienced examiners



- Laws, policies, and/or guidance change.
- Examiners need to be refreshed on topics they don't regularly use.
- OPT analyzes training needs and offers optional training on quarterly basis.
- Technology Centers identify training needs in their area. OPT oversees a collaborative process for developing new materials on an *ad hoc* basis.
- Team of Patents executives oversees mandatory corps-wide training.



Technical and other training



- Patent Examiner Technical Training Program (PETTP)
- Technical Training On Demand (TTOD)
- Site Experience Education (SEE) Program
- Non-duty Technical Training
- Non-duty Legal Studies

Maintaining excellence

Excellence in patent prosecution is achieved at the USPTO through:

- Examiner training
- Innovative tools
- Continual monitoring
- Regular feedback

Data-driven examiner training

- Data from various sources:
 - applicants
 - the public
 - Technology Centers (TCs)
 - Office of Patent Quality Assurance (OPQA)
- **USPTO data collection efforts to enhance quality:**
 - Statistical approach
 - Directed, topic-specific case studies



Innovative tools

- Patent and non-patent literature search tools
- Improved classification and routing
- Global Dossier
- AI searching tools of “more like this” and similarity searching
- Relevant Prior Art Initiative



Continual monitoring

Monitor products and processes via:

- OPQA reviewing (random and directed)
- Stakeholder surveys
- Other sources



The graphic shows a vertical list of six checkboxes on the left, each followed by a horizontal line. The checkboxes contain a green checkmark, a red 'X', a green checkmark, a green checkmark, a green checkmark, and a red question mark. To the right of the checkboxes is the text 'MRF' in blue, followed by the same six horizontal lines. The entire graphic is enclosed in a light gray box with a folded bottom-right corner.

Detailed
assessments via
the **Master Review**
Form (MRF)



Regular feedback

OPQA's detailed assessments go directly to the TCs throughout the fiscal year and

- Promote correctness and consistency
- Encourage best practices through accolades
- Provide data for patent quality metrics
- Enable nuanced data mining to identify specific areas for improvement

Questions



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Thank you!

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