Overview

The e-Office Action program is a new USPTO initiative that is designed to notify applicants, via e-Mail, that new Office communication is available for secure viewing and downloading in Private PAIR. Applicants who opt-in to the program will receive a daily e-Mail notification that will replace the paper mailed delivery of correspondence. In addition, a record of the electronic notification will be placed in the IFW when an e-Office Action notice is sent.

Opting-in to receive electronic notification will automatically stop the Office from sending most Office communication through the postal mail. However, Customers may still receive some paper mailings from USPTO business units that have not yet implemented e-Office Action.

Please Note: The e-Office Action program is optional and is based on applications associated to a Customer Number. Applicants with multiple Customer Numbers must enroll each Customer Number.

Benefits of using e-Office Action

- Less Paper – Improved Processing
  - Minimize risks associated with delayed or lost Office communication sent by mail
  - Reduce paper processing errors and costs
  - Expedite the availability of docketed Office communication in an electronic format

- Easy access to Office Communications in Private PAIR
  - The Office will send a daily e-mail notification to an e-Office Action participant when a new Office communication is available in Private PAIR
  - The e-mail notification will provide comprehensive information regarding the new Office communication, which is easily referenced in Private PAIR

- Flexible Program Features
  - Opt-in or out of the program by Customer Number at any time
  - Assign up to three valid e-mail addresses to receive the e-mail notification
  - Track history of e-Office Action events and view e-mail notification history
  - Receive “reminder” postcards for Office communication that require a response which have not been viewed or downloaded after seven calendar days of notice
Advisory

✓ Any registered attorney or agent of record, or pro se inventor who is a named inventor in a patent application associated with a customer number may participate in the e-Office Action program. To access Private PAIR, the participant must have a Public Key Infrastructure (PKI) certificate linked to the participant’s Customer Number.

✓ To start receiving e-Office Action notifications, users are required to login to Private PAIR and select the “Receive Correspondence Notification via E-mail” option and provide up to three e-mail addresses under the “View Customer Number Details” option.

✓ Several areas of the Office have independent mailing processes. Until all USPTO offices implement e-Office Action, users may continue to receive paper mailings, in addition to e-Office Action notifications, for correspondence originating from areas including but not limited to: Solicitors Office, PCT Operations Division - International Branch, BPAI for interference and reexamination proceedings, Central Reexamination Unit and the Office of Enrollment and Discipline.

✓ Please add the “USPTO.gov” domain to the white list in your e-mail blocking program to allow our e-Office Action notification messages to be received. E-mail blocking programs, also called a spam filters, are intended to prevent most unsolicited e-mail messages (spam) from appearing your inboxes.

✓ Once Customers have opted in, if they choose to opt out it is important to note that at least one e-mail address should be left in Private PAIR for at least 15 days. This is to provide time for documents in process to get to their destination.
How to Participate in e-Office Action

A few simple steps make it easy to begin participating in the USPTO’s e-Office Action program. First, log-in to Private PAIR and select ‘View Customer Number Details’ from the menu list. This will take you to the Details for Customer Number screen so you can review current Customer Number details. Next, select the ‘Request Customer Data Change(s)’ button to enter the Edit Customer Details screen. In the heading section on the Edit Customer Details screen, select: ‘Receive Correspondence Notification via e-Mail’. Finally, enter up to a maximum of three e-mail address(s) where the notifications will be sent, preview your changes, and then submit your change request to the USPTO. After completing this process, PAIR will send a test email to each modified or new e-mail address.

Steps for Opting-in to Receive e-Mail Notices

The following steps will show you how to elect to receive electronic notification when newly arrived Outgoing Correspondence is available for viewing in Private PAIR.

PAIR Main Search Screen

1. From the main PAIR search page, choose ‘View Customer Number Details’.

2. From the drop-down, select the Customer Number for which you wish to receive electronic notification of Outgoing Correspondence.

3. Click on the ‘Search’ button. This brings up the ‘Customer Details’ screen.

Figure 1
1. On the ‘Customer Details’ screen, you can review the data currently on file. To update this information and/or enroll in e-Office Action, click on the ‘Request Customer Data Change(s)’ button.
**Edit Customer Details Screen**

Follow the steps below to edit the customer number details.

1. A Practitioner Registration Number must be entered to submit your Customer data changes unless you are a Pro Se inventor (in which case, this field will not appear).

2. Select the radio button labeled ‘Receive Correspondence Notification via e-Mail’ to enroll. If you wish to Opt-out later, you may return to this screen and select the ‘Receive Correspondence via Postal Mail’ radio button.

3. Enter at least one e-mail address into the Customer Number address screen. You may enter up to three e-mail addresses. When new Outgoing Correspondence is available for viewing in Private PAIR, an e-mail notification will be sent to the listed e-mail addresses.

4. You will also be required to enter a Point of Contact (POC) name, telephone number and e-mail address.

5. Click on ‘Preview Changes’ to verify the changes you have made.

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**Figure 3**
Review Changes Screen

1. Verify the changes you have made. If there is an error, click on ‘Edit Changes’ to return to the previous screen and continue making changes.

2. When the changes are correct, click on ‘Transmit Request to USPTO’. A test message will be sent to each new or modified e-mail address. If you do not receive the test message, please contact the Electronic Business Center (EBC).
Corrections Accepted Screen

Once the changes are submitted, the system will display a confirmation screen. This screen will include a message at the top stating whether or not the request was successfully submitted.

![Figure 5](image)

**Note!** Please see the advisory on page two (2) of this document that warns against eliminating all e-mail addresses. If opting out, Private PAIR e-Office Action participants are advised to leave at least one e-mail address in Private PAIR for 15 days so that email notifications in process can reach their destination.
**View Outgoing Correspondence**

To view or download Outgoing Correspondence in Private PAIR, follow the steps below.

**PAIR Main Search Screen**

1. To begin searching for Outgoing Correspondence, select ‘View Outgoing Correspondence’.

2. Select the desired search parameters.

3. Choose the Customer Number from the ‘Select Customer Number’ dropdown list.

4. Click on the ‘Search’ button.

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![Figure 6](image-url)
**Outgoing Correspondence Results Screen**

The total number of documents found for the entered day range under the selected Customer Number will be displayed as shown in Figure 7.

![Figure 7](image)

- Documents may be downloaded in PDF or XML format.
- Search results can be sorted by selecting the up/down icon next to each column header.
- Select the Application Number hyperlink to view Application data and access the Image File Wrapper (IFW).
- Select the Document Description hyperlink to view the new Office communication.
- The Mailing Date is the commencement of your period to reply. The Image Date is the date on which the document was loaded into the IFW database.
- After a document has been viewed or downloaded, the ‘Earliest Image View Date’ column will be time stamped with that day’s date.
- Documents accessed through Private PAIR’s IFW tab will also populate the ‘Earliest Image View Date’ column as though viewed via the Outgoing Correspondence page.

**Contact Information – Questions?**

If you have any questions regarding the e-Office Action Program for Private PAIR, please contact the Patent Electronic Business Center (EBC) at 866-217-9197 (toll-free) or 571-272-4100 from 6 a.m. to 12 Midnight Eastern Time, Monday - Friday or e-mail the EBC at ebc@uspto.gov

e-Office Action 9 May 2009