

**UNITED STATES
PATENT AND TRADEMARK OFFICE**



Identity verification for trademark filers

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UNITED STATES
PATENT AND TRADEMARK OFFICE



Discussion topics

- ID verification overview
- Roles and accounts
- Electronic verification process
- Notarized paper verification
- Attorney sponsorship
- Questions

Discussion topic

ID verification overview

ID verification

- Overview

- Beginning January 8, 2022, all Trademark Electronic Application (TEAS) and TEASi filers can verify their identities when logging in to their USPTO.gov accounts.
- You must complete ID verification by April 9, 2022.
- After April 9, you cannot file electronically using TEAS or TEASi until you verify your identity.

ID verification

- Background

- Security enhancements in 2019 required logging in to USPTO.gov account to access TEAS or TEASi.
- ID verification builds on this requirement by ensuring that a USPTO.gov account holder is the individual named in the account.
- Lays groundwork for future role-based access:
 - Control and delegate access to application- and registration-related filings.

ID verification

- **Benefits**

- Ensures that the person making submissions to the USPTO to obtain a property right is real, identifiable, authorized to act, and accountable for misconduct, fraud, or abuse of our systems.
- Strengthens the security of the trademark filing process and protects the integrity of the trademark register.
- Focuses on privacy and data security.

Discussion topic

Roles and accounts

Who must be verified

Do you need to edit data within a TEAS or TEASi form or submit a form?

Yes → verify

- U.S.-licensed attorneys
- Unrepresented owners
- Canadian attorney or agent
- Attorney support staff or paralegal
 - Sponsoring attorney verifies identity.

No → not required

- Represented owners
 - Can electronically sign forms without verification.
 - Will need to verify if filing after power of attorney ends, is revoked, or is withdrawn.

Patent-proofed filers:

Certain patent filers won't need to verify again but may need to select a trademark-filing role.

ID verification is role-based

Trademark customers choose a **role** prior to verifying their identities.

- **Attorneys** and **owners** verify their identity with one of the two ID verification options.
- **Attorney support staff** are verified by their sponsoring attorney.

Trademark roles

- U.S.-licensed attorney
- Canadian attorney or agent
- Trademark owner
- Attorney support staff

Roles and accounts

- Review your USPTO.gov account
 - Your USPTO.gov account name must match name on government-issued ID that you use.
 - Inconsistency could delay processing.
 - Once ID verification is complete, you cannot modify your account name except in limited instances, such as an official name change.

Discussion topic

Electronic verification process

Electronic verification process

- What ID.me is
 - Used by corporate, federal, and state government agencies worldwide for safe and secure ID verification.
 - FedRAMP authorized for secure-data storage.
 - National Institute of Standards and Technology (NIST) Digital Identity Guidelines compliant (NIST Special Publication 800-63-3).

ID.me privacy bill of rights

Control the data you provide during the verification process:

- **You** solely control your own data.
- **You** must provide explicit consent before ID.me will share any information.
- **You** can see all authorized apps and data elements shared in your My Account portal.
- **You** can revoke access to your data for any authorized app at any time.
- **You** can destroy your ID.me credential and associated data at any time. Some data will be retained after account deletion solely for fraud prevention and government auditing purposes.
- See <https://insights.id.me/privacy-bill-of-rights/>.

Electronic verification process

- What to expect
 - Most customers complete the self-service automated process in less than 15 minutes.
 - If unsuccessful with self-service, you can complete the process via a live video conference session with a trusted referee.
 - International customers will be routed to a trusted referee.

Electronic verification process

Have these ready:

- **Smartphone, tablet, or computer**
 - Must have front-facing camera and internet connection.
- **Government-issued photo ID**
 - If names on your ID and USPTO.gov account don't match exactly, name on your account will be automatically updated to match your ID.

ID.me will ask you for:

- **Your Social Security number (U.S. only)**
 - USPTO won't receive this from ID.me.
- **Biometric data**
 - ID.me uses your selfie and photo ID to verify your identity.
- **Permission to access your credit profile**
 - Known as "soft credit check" – your credit score isn't affected.

Getting started: verifying with ID.me

Steps:

1. Log in to USPTO.gov account.
2. Click on a TEAS/TEASi form.
3. Select your role under "Verify electronically now with ID.me."
4. Click "Verify with ID.me."



ID Verification options

Electronic verification | Alternative paper verification

Verify electronically

In most cases, this process takes about 15 minutes to verify through our trusted partner ID.me. The only information the USPTO receives back from ID.me is your verified full name.

You'll need:

-  A smartphone or tablet
-  A government-issued photo ID

You'll provide:

- Your Social Security number
- Biometric data (your photo ID and a 'selfie')
- Access to your credit profile (your credit score won't be affected)

[Learn about these requirements](#)

Verify electronically now with ID.me

ID verification is powered by ID.me.

If you already have an ID.me account you may already be verified.

Select your role to get started

Please select

[Learn more about roles.](#)

Verify with ID.me

About ID.me

ID.me is a third-party identity verification service trusted by many government agencies, such as Veterans Affairs and the Social Security Administration. It uses bank-grade technology to safeguard your data.

[Learn how ID.me protects your information.](#)

Create ID.me account

Steps:

1. Enter email address.
2. Create password.
3. Confirm password.
4. Confirm email address.
5. Set up multi-factor authentication.

Create an ID.me account

Already have an ID.me account?
[Sign in to your account](#)

Email

Password

Confirm Password

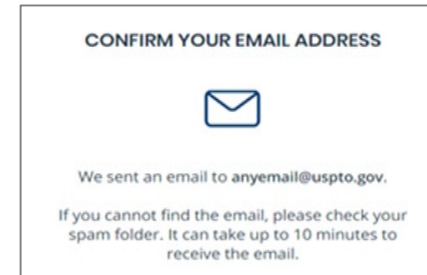
I accept the ID.me [Terms of Service](#) and [Privacy Policy](#)

[Create an ID.me account](#)

Or sign in with

[f Facebook](#) [G Google](#) [in LinkedIn](#)

[View more options >](#)




ID.me authorization process

Steps:

1. Take photo of ID with phone or upload photo from computer.
2. Use camera to upload photo of head and shoulders.
3. Enter Social Security number.
4. Confirm information.
5. Agree to share first, last, and middle name with the USPTO. The USPTO does not collect any other personally identifiable information.
6. Submit to continue.

AUTHORIZE USPTO



We've verified your identity!

Before we send you back to the USPTO, we need your permission to share your verified identity information.

Please note that only information obtained from the verification process will be shared.

USPTO will receive:

First Name Middle Name

Last Name

Allow

Deny

You can remove this access at any time by changing your ID.me account settings.



ID.me authorization process

Steps:

1. Take photo of ID with phone or upload photo from computer.
 - a. Enter mobile number.


VERIFY YOUR IDENTITY

1 — 2 — 3 — 4 — 5

Take photos with your phone

Enter your mobile phone number, and we'll text you a link to take photos of your document and confirm your identity with telecom operators.

Enter your mobile phone number

 (505) 555-5555

YOUR MOBILE PHONE MUST HAVE A CAMERA AND A WEB BROWSER.

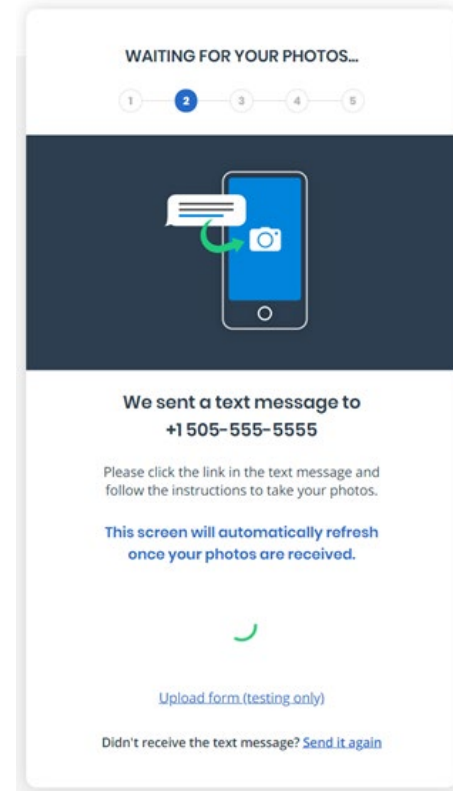
[Back](#) [Continue](#)

By entering your phone number, you agree to receive notifications via text message or voice calls during sign in attempts in order to protect your account.

ID.me authorization process

Steps:

1. Take photo of ID with phone or upload photo from computer.
 - a. Enter mobile number.
 - b. Click link in text message.



ID.me authorization process

Steps:

1. Take photo of ID with phone or upload photo from computer.
 - a. Enter mobile number.
 - b. Click link in text message.
 - c. Take or upload photo of ID.

VERIFY YOUR IDENTITY

1 2 3 4 5

Choose how to submit photos

In order to verify your identity, please make sure:

- 1) Your document is up to date and valid
- 2) Your document is clear and readable
- 3) You take the photo on a well-lit flat surface

Take a photo with my device

YOUR MOBILE PHONE MUST HAVE A CAMERA AND A WEB BROWSER.

OR

Upload a photo

Detailed description: This screenshot shows the 'VERIFY YOUR IDENTITY' step. At the top, there is a progress indicator with five numbered steps, where step 1 is highlighted. Below this, the user is prompted to 'Choose how to submit photos'. A list of three instructions is provided: 1) 'Your document is up to date and valid', 2) 'Your document is clear and readable', and 3) 'You take the photo on a well-lit flat surface'. Below the instructions, there is a dark blue area with a white dashed box containing a placeholder for an ID card with a person icon and the text 'MM/DD/YYYY'. A green checkmark is visible next to the placeholder. At the bottom, there are two options: a blue button labeled 'Take a photo with my device' and a white button labeled 'Upload a photo' with an upload icon.

TAKE PHOTOS WITH YOUR PHONE

1 2 3 4 5

Quick Tip

Place document on a flat, uncluttered surface, use landscape orientation and ensure your document photo is clear and readable.

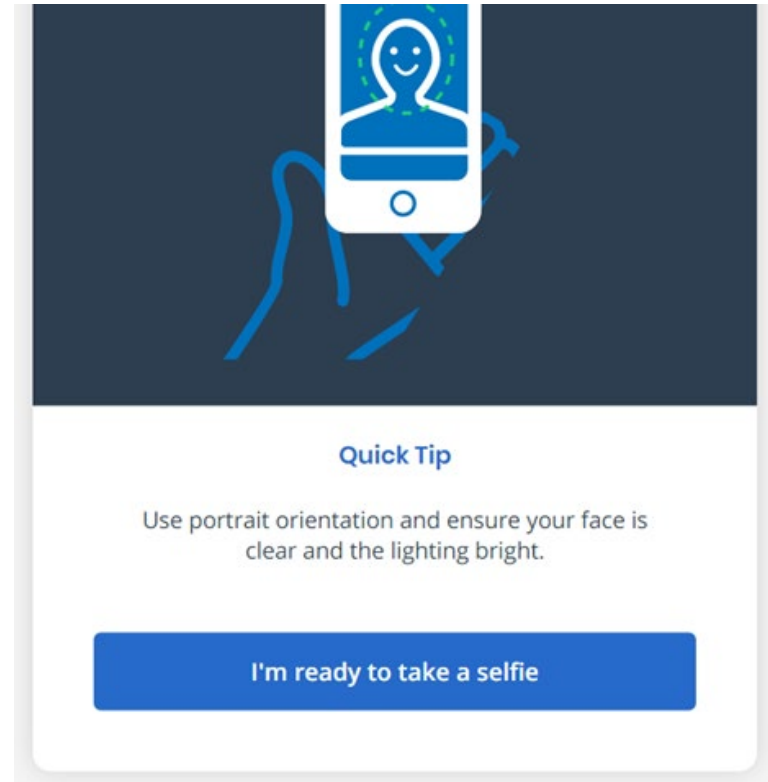
I'm ready to take a photo

Detailed description: This screenshot shows the 'TAKE PHOTOS WITH YOUR PHONE' step. At the top, there is a progress indicator with five numbered steps, where step 2 is highlighted. Below this, there is a dark blue area with a white dashed box containing a placeholder for a photo of a document being held by two hands. A green checkmark is visible next to the placeholder. Below this, there is a 'Quick Tip' section with the text: 'Place document on a flat, uncluttered surface, use landscape orientation and ensure your document photo is clear and readable.' At the bottom, there is a blue button labeled 'I'm ready to take a photo'.

ID.me authorization process

Steps:

2. Use camera to upload photo of head and shoulders.





ID.me authorization process

Steps:

3. Enter Social Security number.

The screenshot shows a verification interface with the title "VERIFY YOUR IDENTITY". At the top, there is a progress indicator with five numbered steps (1-5), where step 4 is highlighted in blue. Below the progress indicator, the text "Enter your Social Security number" is displayed. Underneath, the label "Social Security Number *" is followed by a text input field containing a masked pattern of nine hash symbols (#). At the bottom of the form, there are two buttons: a white "Back" button and a blue "Continue" button.



ID.me authorization process

Steps:

4. Confirm information.

ID.me authorization process

Steps:

5. Agree to share first, last, and middle name with the USPTO.
6. Submit to continue.

USPTO will receive:

First Name Middle Name

Last Name

Allow

Deny

You can remove this access at any time by changing your ID.me account settings.

Continue to TEAS or TEASi form

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Trademark - ID Verification [ID Verification Help](#)

Verify your identity

✓ You've already successfully completed your identity verification. You may access [TEAS](#) and [TEASi](#) with your USPTO.gov account. [Continue](#)

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ABOUT THIS SITE

- Accessibility
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USPTO BACKGROUND

- Federal Activity Inventory Reform Act (FAIR)
- Performance and Planning
- Freedom of Information Act
- Information Quality Guidelines

FEDERAL GOVERNMENT

- Regulations.gov
- StopFakes.gov
- USA.gov
- Department of Commerce
- Strategy Targeting Organized Piracy

Discussion topic

Notarized paper verification

Notarized paper ID verification

You will:

- Complete verification form.
- Get form notarized.
 - Present two forms of photo ID to notary.
- Mail form to the USPTO for Electronic Business Center review.

We will:

- Ensure that full name and email address match the USPTO.gov account.
- Verify customer's USPTO.gov account.

Trademark identity verification form for TEAS/TEASI	Address to: Mail Stop EBC Commissioner for Trademarks P.O. Box 1451 Alexandria, VA 22313-1451	USPTO use only
Block 1 – Requestor role <i>Please refer to form instructions to minimize processing delays.</i>		
Select your filing role: U.S.-licensed attorney Canadian attorney/agent Trademark owner	Attorneys must provide bar registration number, if available:	Paralegals and attorney support staff: <i>Please do not use this form. Have your supervising attorney sponsor you at https://www.uspto.gov/sponsorship</i>
When you verify your identity, your USPTO.gov account will be authorized to make Trademark filings. Please make sure all the information in Block 2 is an exact match to the information in your USPTO.gov account before submitting this form by updating your USPTO.gov account if necessary.		
Block 2 – Requestor information [all information required]		
First (given) name	Middle name	Last (family) name
Street address (line 1)		
Street address (line 2)		
City	State	Zip
Country	USPTO.gov account email address	
Telephone number (select phone location)	Home Work Cell	
Block 3 – Type of action requested [must select at least one]		
<input type="checkbox"/> Verify an existing USPTO.gov account and authorize it for Trademark filing		
<input type="checkbox"/> Update USPTO.gov account USPTO.gov email address has been changed. Previous email address:		
<input type="checkbox"/> Change USPTO.gov account holder's name For U.S.-licensed attorneys and Canadian attorneys/agents, the new requested name must correspond to any applicable professional registration records, e.g., bar registration records. Please enter the name under which the USPTO.gov account was previously created below, and enter your new name in the space provided in Block 2. Previous name:		
<input type="checkbox"/> Revoke Trademark authorization for current USPTO.gov account		
<input type="checkbox"/> Other – describe in detail:		
Block 4 – Signature [required]		
I have read and understand the Terms of Use for USPTO.gov accounts [as listed on https://www.uspto.gov/terms-use-uspto-website] and my signature on this document, by hand, is my agreement to abide by the Terms of Use and the rules and policies of the USPTO regarding the Terms of Use.		
I certify that the information, statements and representations provided by me on this form are true and accurate to the best of my knowledge. I understand that a willfully false certification is a criminal offense and is punishable by law [18 U.S.C. 1001].		
Signature required [requestor from block 2]		Date (mm/dd/yyyy)

Discussion topic

Attorney sponsorship

Attorney sponsorship

- **Attorneys sponsor support staff and paralegals.**
 - Access sponsorship tool directly or from MyUSPTO.
 - Support staff and paralegals must have established USPTO.gov accounts.
 - Attorney is ultimately responsible for verifying identity of support staff and paralegals.
- **Non-attorney trademark owners can't sponsor support staff.**

Attorney and support staff options

Attorneys can:

- Sponsor support staff.
- Revoke sponsorships.
- Manage sponsorship requests.
- Restore previously sponsored support staff.
- View sponsorship history.

Sponsored support staff can:

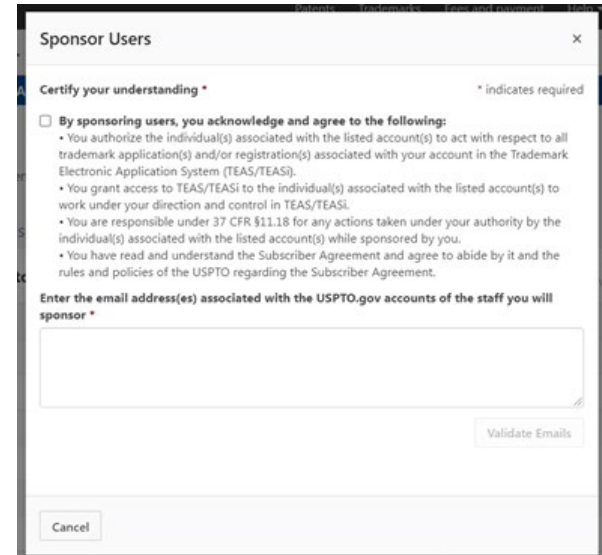
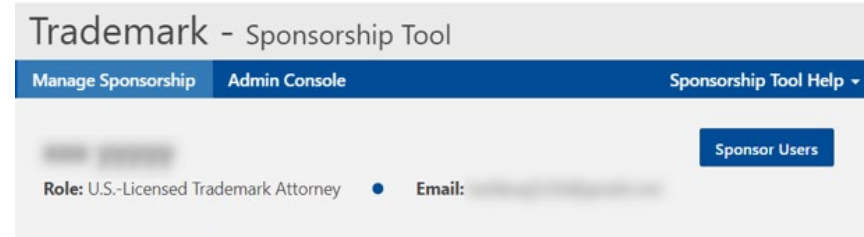
- Withdraw from sponsorship.
- Request sponsorship for another support staff member.
- View sponsorship history.

Attorney sponsorship of support staff

Performed by attorney

Steps:

1. Click "Sponsor users."
2. Certify understanding of terms of use.
3. Enter support staff email connected to active USPTO.gov account.
4. Validate email address(es).



Revoke sponsorship of support staff

Performed by attorney

Steps:

1. Go to “Active sponsorships” tab.
2. Check box next to each email address to revoke.
3. Click “Revoke sponsorship” button.
4. Confirm choices.

The screenshot shows the USPTO Trademark Management System interface. A modal dialog box titled "Revoke sponsorship" is open, asking for confirmation to revoke sponsorship for attorney support staff. The dialog contains a table with columns for Name and Email. Below the dialog, a table lists support staff members with checkboxes for revocation.

Name	Email
Tom Smith	tom.smith@uspto.gov
Monica Smith	monica.smith@uspto.gov
Mark Smith	mark.smith@uspto.gov

Support staff name	Email	Date	Revoke
Tom Smith	****@gmail.com	Nov 02, 2021 10:42 AM ET	<input checked="" type="checkbox"/>
Monica Smith	****@gmail.com	Nov 02, 2021 10:42 AM ET	<input checked="" type="checkbox"/>
Mark Smith	****@gmail.com	Nov 02, 2021 10:42 AM ET	<input checked="" type="checkbox"/>
Sally Smith	****@gmail.com	Oct 28, 2021 12:15 PM ET	<input type="checkbox"/>
Tim Smith	****@gmail.com	Oct 21, 2021 12:52 PM ET	<input type="checkbox"/>
Todd Smith	****@gmail.com	Oct 21, 2021 12:52 PM ET	<input type="checkbox"/>
Linda Smith	****@gmail.com	Oct 21, 2021 12:51 PM ET	<input type="checkbox"/>
Tina Smith	****@gmail.com	Oct 21, 2021 12:48 PM ET	<input type="checkbox"/>
Steve Smith	****@gmail.com	Aug 04, 2021 01:19 PM ET	<input type="checkbox"/>
T. Markey	*****@uspto.gov	Aug 04, 2021 01:19 PM ET	<input type="checkbox"/>

Approve sponsorship requests

Performed by attorney

Note:

- Requests to sponsor other support staff members will appear in "Pending requests" tab.
- You can accept or deny sponsorship requests.

The screenshot displays the USPTO Trademark Sponsors interface. The main page shows the user's profile as Michael Smith, a US-Licensed Trademark Attorney. A modal dialog box titled "Confirm sponsorship approval" is open, requiring the user to certify their understanding. The dialog includes a checkbox for "By sponsoring users, you acknowledge and agree to the following:" and a list of terms. Below the terms is a table with columns for "Attorney support" and "Requested by".

Attorney support	Requested by
Alex Henry testfpgn1116@gmail.com	Tom Smith testfpgn.g1116@gmail.com

The dialog also features a "Sponsor" button and a "Cancel" button. The background interface shows a "Sponsor users" button and a table with one selected row.

Request attorney sponsorship for others

Performed by support staff

Steps:

1. Click "Request sponsorship" button.
2. Choose sponsoring attorney.
3. Enter one or more support staff email addresses.
4. Confirm choices.

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Request sponsorship

Sponsoring attorney * * indicates required

Michael Smith

Enter the email address(es) of user(s) to be sponsored *

*****@gmail.com

Validate emails

1 user(s) retrieved:

Name	Email	Action
Stu Smith	*****@gmail.com	X

Cancel Request sponsorship

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BROWSE BY TOPIC ABOUT THIS SITE USPTO BACKGROUND FEDERAL GOVERNMENT

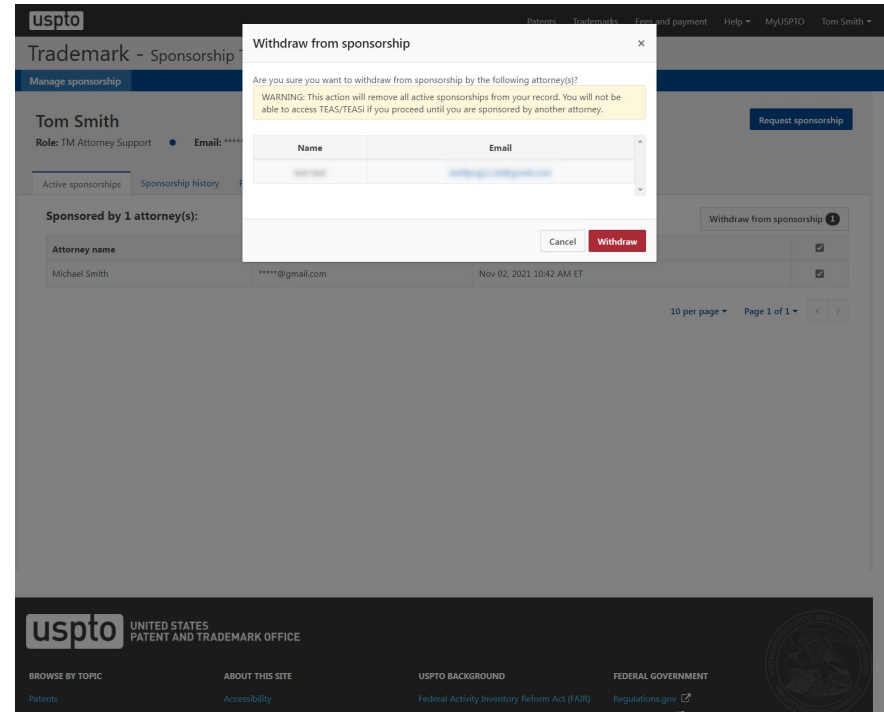
Patents Accessibility Federal Activity Inventory Reform Act Regulations.gov

Withdraw from sponsorship

Performed by support staff

Steps:

1. Go to "Active sponsorships" tab.
2. Check box of sponsorship to withdraw from.
3. Confirm choice.
4. Support staff without any sponsorships will not have access to TEAS or TEASi.



Additional resources

- USPTO identity verification webpage: <https://www.uspto.gov/trademarks/apply/identity-verification>
- ID.me links:
 - Privacy bill of rights: <https://insights.id.me/privacy-bill-of-rights/>
 - Privacy policy: <https://www.id.me/privacy>
 - Biometric policy: <https://www.id.me/biometric>



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Discussion topic

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