



Patent Center e-OfficeAction

Quick Start Guide

Overview

The e-Office Action program has been designed to notify applicants, via e-Mail, that new Office communication is available for secure viewing and downloading in Patent Center. 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
- *Access new Office Communications using Workbench/Correspondence in Patent Center*
 - The Office will send a daily e-mail notification to an e-Office Action participant when a new Office communication is available in Patent Center
 - The e-mail notification will provide comprehensive information regarding the new Office communication, which is easily referenced in Patent Center
 - *New: Participants enrolled in e-Office Action can search for new correspondence listed in the daily email by selecting Workbench/Correspondence then select the “e-notifications only” filter under Correspondence method dropdown*
 - *New: Only Customer Numbers enrolled in e-Office Action will be listed in the e-notifications only filter*
- 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 communications that require a response and 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 Patent Center, the participant must have a registered account linked to the participant's Customer Number.
- ✓ To start receiving e-Office Action notifications, users are required to login to Patent Center and select the "Receive Correspondence Notification via E-mail" option and provide up to three e-mail addresses under the "Manage/Manage customer numbers" menu.
- ✓ 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.
- ✓ In order to ensure timely and consistent receipt of Patent Center e-Office Action notifications and alerts, please have your information technology team add the following whitelist parameters to your email program;
 - Domain Name: USPTO.gov
 - Sender address: noreply@uspto.gov
 - Subject: USPTO: Patent Electronic System - e-Postcard Notification for Customer Number
- ✓ 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 Patent Center 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

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

PATENT CENTER Main Search Screen

1. From the main Patent Center page, select the Manage tab at the top or the Manage tile Administration.
2. From the drop-down, select Manage customer numbers under the “Customer Number Management” section, then select the Customer Number for which you wish to receive electronic notification of Outgoing Correspondence.
3. Click on the ‘Edit’ button. This brings up the ‘Edit customer number’ screen.

The screenshot displays the Patent Center interface. At the top, a navigation bar includes 'Existing submissions', 'Petitions', 'Post grant', 'Workbench', 'Manage', and 'Search'. The 'Manage' dropdown menu is open, showing options: 'CUSTOMER NUMBER MANAGEMENT' (with a callout '1'), 'Manage customer numbers' (with a callout '2'), 'Update application address', 'SAVED & COMPLETED REQUESTS', 'View saved and completed requests', 'SPONSORSHIP', and 'Sponsor users'. The main content area is divided into sections: 'Customer details' (Customer number: 17150), 'Customer information' (Defect Verify, 123 Defect Testing, Alexandria, VA - 32235, UNITED STATES, Email: test@...mail.com, Phone: 6516516515, Fax, Outgoing correspondence: I would like to receive notifications via Email), and 'Practitioner details' (Showing 1 existing practitioners, Reg # 74252, Practitioner AL...). At the bottom right, there are 'Back' and 'Edit' buttons, with a callout '3' pointing to the 'Edit' button.

Edit customer number Screen

Follow the steps below to edit the customer number details.

1. On the 'Edit customer number' screen, you can review the data currently on file. To update this information and/or enroll in e-Office Action, select in the drop down '**Receive Correspondence Notification via email**' under the 'Outgoing Correspondence' section.
2. Enter at least one e-mail address into the Customer Number address screen. Up to three e-mail addresses can be added to the customer number. When new Outgoing Correspondence is available for viewing in Patent Center, an e-mail notification will be sent to the listed e-mail addresses.

Contact details
Extension numbers are optional.

Telephone number	Extension (optional)
<input type="text" value="6516516515"/>	<input type="text" value="Phone Ext."/> +
Fax Number (optional)	Extension (optional)
<input type="text" value="Fax Num"/>	<input type="text" value="Fax Ext."/> +
Email (optional)	
<input type="text" value="test@ mail.com"/>	+ 2

Outgoing correspondence

I would like to receive notifications via

1

[Blurred area]

3. After enrolling in e-Office Action, you can also then select the ‘**Postcard notification method**’. By default, “Postal mail” will be selected but you may also elect to receive postcard notifications via email. To change the postcard method to email notification, select “Receive Postcard Notification via Email”. The e-postcard will be sent to the email addresses assigned to the customer number.
4. You will also be required to enter a Point of Contact (POC) name, telephone number and e-mail address.
5. Click on ‘Continue’ to verify the changes you have made.

Outgoing correspondence
Current notification method: Postal mail

Receive correspondence notification via Email

Postcard notification method
Current notification method: Mail

Receive correspondence notification via Email

Point of contact

Full name

Telephone number Ext (optional)

Email

[Cancel request](#)

The screenshot shows a form titled "Outgoing correspondence" with three sections. The first section, "Outgoing correspondence", shows the current notification method as "Postal mail" and a checked checkbox for "Receive correspondence notification via Email". The second section, "Postcard notification method", shows the current notification method as "Mail" and a checked checkbox for "Receive correspondence notification via Email". The third section, "Point of contact", contains three input fields: "Full name", "Telephone number", and "Ext (optional)", and an "Email" input field. A vertical line is drawn to the right of these fields. At the bottom of the form, there are four buttons: "Cancel request" (a link), "Back", "Save progress", and "Continue".

Review & Submit Screen

1. Verify the changes requested are indicated on upper portion. If there is an error, click on 'Back' button to return to the previous screen and continue making changes.
2. When the changes are correct enter your /e-signature/ then click on 'Submit'. A 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).

Point of contact

Full name

Tester

Telephone number

5711114444

Ext (optional)

Email

test@test.com

Practitioner signature

Signature

Type your signature between two slashes, e.g. / John Doe /

Signature is required

First name

Tester

Last name

Practitioner

Registration number

742

[Cancel request](#)

1

Back


2

Submit

Confirmation Screen

1. 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.
2. Upon acceptance of the change request, the Receive Outgoing Correspondence Notification will indicate "Email" and the selected postcard notification method.
3. A CN update notification will be sent to the e-mail addresses associated to the customer number.

✓ Successfully updated customer number **171508 - Example Name**. The request was received on 03/27/2023 10:09AM ET. Request Id: 41886.
Email notification has been sent.

Customer number	Request Id	Request received	
17150	41886	03/27/2023 10:09AM ET	

Contact details

Extension numbers are optional.

Telephone number

Extension

6516516515

Phone Ext.

Fax Number (optional)

Extension

Email (optional)

test@ mail.com

Outgoing correspondence

Current notification method: Email

Postcard notification method

I would like to receive postcard notifications via **Electronic delivery**

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

Access New Correspondence using Workbench

To view or download new correspondence in Patent Center, follow the steps below.

PATENT CENTER Main Search Screen

1. To begin searching for e-Office Action Notifications, select Workbench, then 'View correspondence'.
2. Go to 'Correspondence method' and select 'e-Notifications only'.
3. Select the desired search parameters and click on 'Apply'.
- a) Applicants can search by a specific date or by a date range within the previous 90 days, or by preselected date ranges of 90, 60, 30, 7, 3 days, or the current day.
4. Select the desired Customer Number(s) or select All.
5. Click on the 'Apply Filter' button.

The screenshot displays the Patent Center Main Search Screen. At the top, there are four tabs: 'Saved Submissions', 'Applications', 'Correspondence', and 'Receipt History'. The 'Correspondence' tab is selected. Below the tabs, there is a 'Customer number' dropdown menu set to 'ALL', with a callout box labeled '4' pointing to it. To the right of the 'Customer number' dropdown is a 'Reset' link. Below this is a 'Refine by' section with several filters: 'Correspondence method' is set to 'e-Notifications only' (callout box '2'), 'Date Type' is set to 'e-Notification Date', 'Image Date' and 'Mailing Date' are empty text boxes, and 'e-Notification Date' is set to 'Custom range' with a date range of '03/24/2023 to 03/27/2023' (callout box '3'). There is also an unchecked checkbox for 'Unviewed correspondence' and an 'Apply filter' button. A light blue banner on the right side of the screen displays an information icon and the text 'No Data Available'.

- From Workbench/Correspondence, select which documents to download in PDF format and when available, DOCX or XML.
- Alternatively, select the Application Number hyperlink to access the application.
- Select Documents & Transactions to access files associated to the application.
- The Mailing Date is the commencement of your period to reply.
- The e-Notification Date is the date on which you were notified for the new correspondence.
- After a document has been first viewed or downloaded, the 'Earliest Image View Date' column will be time stamped with that day's date and the 'Viewed By' column will display the user name.
- Documents accessed through Patent Center's Documents and Transactions tab will also populate the 'Earliest Image View Date' and "Viewed by" columns as though viewed via the View e-Office Action Notification page.

Contact Information – Questions?

If you have any questions regarding the e-Office Action Program for Patent Center, 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.