

# Quick Start Guide

## 1. Search by Customer Number Details

### 1.1 Description

Customers using the United States Patent and Trademark Office (USPTO) Private Patent Information and Retrieval (PAIR) system can view or print their customer details and request changes to that data. (Note: These changes then are validated and updated in the Patent Application Locating and Monitoring (PALM) system.)

### NEW

**DESCRIPTION:** Customers will be notified of any additions or modifications to their e-mail address – that is, for every addition or change to an e-mail address, Customers will receive test e-mails.

**PROCEDURE:** When users enter PAIR and click the Customer Number Details radio button, and an addition or modification to the Customer's e-mail address is made, a test message will be sent to verify that the changes made have been correctly entered into the PALM database.

**BENEFIT:** Customers of record will receive an electronic notification that will enable them to confirm the changes and effectively correct any errors in e-mail address modifications—an important cost and time-saving feature.

**NOTE!** For assistance with any of the steps shown in this guide, users can contact the Electronic Business Center (EBC) at the Customer Support Center. Information is shown in the table at the end of this guide (in Section 8).

## 2. Steps for Accessing Customer Details

To search for applications by customer number, navigate to the *Select New Case* screen, shown in Figure 2-1 below. (Note the screen below shows a number of the new drop-down features available to Private PAIR users.)

The screenshot displays the 'Select New Case' web interface. At the top, there is a 'Select New Case' button and a title bar. Below the title bar, a note states '\* indicates a required field' and provides instructions: 'You may search for a specific application or conduct a search related to a customer number.' The main section is titled 'Search by Customer Number:' and includes a 'Choose One:' dropdown menu with four radio button options: 'Applications by Customer Number', 'Applications with Status Changes', 'View Outgoing Correspondence', and 'View Customer Number Details'. A red arrow labeled '1.' points to the 'View Customer Number Details' option. To the right of these options, there are two dropdown menus: 'for the past' (with options: 3 days, 7 days, 30 days, 60 days, 90 days) and 'sort by' (with options: Image Upload Date, Image UploadDate, Application, Attorney Docket Number, Customer Number, Document View Date, Mail Room Date, Patent Number). A red arrow labeled '2.' points to the 'Image UploadDate' option in the 'sort by' menu. Below these options is a 'Select Customer Number:' dropdown menu with a list of customer numbers and names, including 'All', '59 -> SIRA', '140 -> Acme Corp12', '826 -> Newest', '881 -> ABC Firm NameOne333333333', '5514 -> FITZPATRICK CELLA HARPER & SCINTO', '21121 -> DANIEL DORFMAN, HERRELL SKILLMAN4', '21171 -> STARS & HALSEY LLP', '22195 -> HUMAN GENOME SCIENCES INC', '22204 -> NIXON PEABODY, LLP TEST', and '22850 -> Oblen Spivak'. A red arrow labeled '3.' points to the 'SEARCH' button. At the bottom of the page, there is a 'Search by Attorney Docket Number:' section with an 'Enter number:' field, a 'SEARCH' button, and a 'Choose Search type:' dropdown menu with options 'Exact Match' and 'Starts With'.

Figure 2-1 Steps for Viewing Customer Details

Next, scroll down to the *Search by Customer Number* section, and follow these steps:

1. Choose *View Customer Number Details*, by clicking the radio button.
2. Choose the desired Customer Number from the drop-down list *Select Customer Number*. Note that there is a default of "All."
3. Click on the *Search* button.

### 3. Viewing Customer Details

In the *Customer Details* section you can view Customer Number information such as: Correspondence Address, Correspondence e-Mail, Telephone Numbers, Fax Numbers and Associated Practitioners.

Customer Details		Last Private PAIR Update:2006-12-28 15:35:54
Details For Customer Number : 37270		Outgoing Correspondence:EMAIL
Correspondence Address:	Sanders TEST Commerce St. Antown, KS 55555	
Correspondence E-Mail:	PTOmail1@uspto.gov PTOmail2@uspto.gov PTOmail3@uspto.gov	
Telephone Numbers:	: 800-555-1212 - -	
Fax Numbers:	:800-555-1212 -	
Associated Individuals:	55555 Doe, John 44444 Henry, King 33333 Henry, Queen	
<input type="button" value="Request Customer Data Change(s)"/>		

Figure 3-1 Customer Details Change Request Selection

If you would like to change any of the information displayed on the *Customer Details* screen, click the "Request Customer Data Change(s)" button (shown in Figure 3-1).

**NOTE!** There is a message in the Customer Details title bar below the tabs that indicates the last time this user entered changes (updates). The message reads: "Last Private PAIR Update: YYYY-MM-DD: (Time recorded in hours, minutes and seconds)."

### 4. Edit Customer Details

When the *Customer Details* information displays, a screen similar to the one shown in Figure 4-1 (below) will appear. Changes to the Customer Details made on this screen only pertain to the data stored in the U.S. Patent Application and Location Monitoring (PALM) database. The data changes are not automatically forwarded to the International PCT Authority. The World Intellectual Property Organization (WIPO) requires that changes to its database be submitted directly to that organization by separate petition.



2. This section of the page also allows you to make any changes in the Individual's Name, Address, City, State, Zip, Country, Telephone, e-Mail and Fax. (Changes to this data will be automatically updated in the PALM database)
3. By checking the box next to an associated practitioner, you may delete any practitioner from your customer number. (Practitioner removals will be automatically updated in the PALM database as well.
4. This section allows you to add the practitioner's Registration Number(s) to associate to your customer number. (Practitioner additions will be reviewed by the EBC personnel before the PALM update is made.
5. Enter the Point of Contact (POC) name, telephone number, and e-mail address of the practitioner requesting the changes. This section will allow you to enter the POC handling the changes.
6. To review changes, press "Preview Changes." (See Figure 4-1)

## 5. Reviewing Changes

The *Customer Number—Review corrections prior to submission* screen will appear, allowing you to view the changes that were made to the Customer Number Details.

The screenshot shows a web browser window titled "Secured Patent Application Information Retrieval". The main heading is "Customer Number - Review corrections prior to submission" with a sub-heading "Last Private PAIR Update: 2006-12-16 16:22:15". Below this, there are sections for "Data Changes For Customer Number: 67577" and "Outgoing Correspondence: MAIL". A note states: "These address changes apply only to the US applications associated with the Customer Number. PCT applicants must file a paper under PCT Rule 92bis with either the receiving Office or the International Bureau to change the correspondence address for an international application." The form contains the following fields:

- Name of Individual Submitting Request: John Doe Testing
- Practitioner No.: X12345
- No Changes To Address
- Practitioner Number(s) to be deleted:
- Practitioner Number(s) to be added:
- Point of Contact:
  - Point of Contact Name: Dewey's sister
  - Telephone: 888-555-1212
  - E-Mail:

At the bottom of the form, there are two buttons: "Edit Changes" and "Transmit Request to USPTO". Red arrows point to these buttons, with "1." pointing to "Edit Changes" and "2." pointing to "Transmit Request to USPTO".

If you need help:

- Call the Patent Electronic Business Center at (866) 217-9197 (toll free) or e-mail [EBC@uspto.gov](mailto:EBC@uspto.gov) for specific questions about Patent Application Information Retrieval (PAIR).
- Send general questions about USPTO programs to the [USPTO Contact Center \(UCC\)](#).
- If you experience technical difficulties or problems with this application, please report them via e-mail to [Electronic Business Support](#) or call 1.800.786.9199.

Figure 5-1 Reviewing Changes

correspondence immediately in Private PAIR. There may be times when you receive an e-mail on Saturday or Sunday, and the correspondence will not be available until Monday morning. In this case, however, the start of the response period will still be on the mailroom date recorded in the PALM database.

## 6. Further Changes—Editing and Transmitting

After reviewing the changes you have made to your customer number data, you can take the following steps.

On this screen, if you see that the changes you made are incorrect, you may:

1. Click the "Edit Changes" button (in Figure 5-1). Make any further changes you think are necessary.

**NOTE!** If there are multiple listings of the same name, the user must select one of the names in order to proceed in the system. Also note, if users change an e-mail address, a test e-mail will be sent to verify the address change. In addition, if users choose to opt-out of the e-Office Action program, a message will appear recommending that at least one e-mail address remain for 15 days so that all documents in process will have time to reach their destination. (See "Advisory" in the e-Office Action Quick Start Guide.)

2. If all the necessary Customer Number changes have been made and properly reviewed, you can click on the "Transmit Request to USPTO" to transmit the data.

## 7. Acknowledgement Page

Once you click on the "Transmit Request to USPTO," your edits/changes are sent to the USPTO and you will receive a *Customer Number — Corrections Accepted* acknowledgement page, with a date and time stamp (Figure 7-1).

Secured Patent Application Information Retrieval

Select Case Customer Details

Customer Number - Review corrections prior to submission Last Private PAIR Update: 2006-12-16 16:22:15

Data Changes For Customer Number: 67577 Outgoing Correspondence: MAIL

These address changes apply only to the US applications associated with the Customer Number. PCT applicants must file a paper under IPCT Rule 92bis with either the receiving Office or the International Bureau to change the correspondence address for an international application.

Name of Individual Submitting Request John Doe Testing

Practitioner No. X12345

No Changes To Address

Practitioner Number(s) to be deleted:

Practitioner Number(s) to be added:

Point of Contact:

Point of Contact Name: Dewey's sister

Telephone : 888-555-1212

E-Mail:

Edit Changes Transmit Request to USPTO

If you need help:

- Call the Patent Electronic Business Center at (866) 217-9197 (toll free) or e-mail [EBC@uspto.gov](mailto:EBC@uspto.gov) for specific questions about Patent Application Information Retrieval (PAIR).
- Send general questions about USPTO programs to the [USPTO Contact Center \(USCC\)](#).
- If you experience technical difficulties or problems with this application, please report them via e-mail to [Electronic Business Support](#) or call 1 800-786-9199.

Figure 7-1 Customer Number Details Corrections Acknowledgement Page

## 8. Questions? Contact Information for EBC

Call, e-mail or send a fax (or letter by regular mail) to the USPTO regarding any questions you may have about the Customer Number Details change process or related matters. You can contact the USPTO Electronic Business Center (EBC) directly using the following telephone numbers or address information. The EBC hours of operation are also noted.

### **Weekday Operation: Monday – Friday: 6 AM - Midnight (Eastern Time)**

**Telephone:** 1-866-217-9197 (toll-free)  
571-272-4100 (local)

**E-mail:** [ebc@uspto.gov](mailto:ebc@uspto.gov)

**Fax:** 571-273-0177

**Postal:**  
Mail Stop EBC  
Commissioner for Patents  
PO Box 1450  
Alexandria, VA 22313-1450