

December 9, 2016

# Create PTAB E2E Account

In order to initially use the PTAB E2E system to create a petition or participate as patent owner counsel, a user must first create an account in PTAB E2E. **NOTE: Google Chrome is the preferred browser for the PTAB E2E system.**

## 1.1 User Registration (Create an Account)

Using an internet browser, navigate to the PTAB E2E homepage (<https://ptab.uspto.gov>) and click on the “Create an account” link at the bottom of the “Log In” box (see Figure 1: PTAB E2E Home screen).

The screenshot displays the PTAB E2E Home screen. At the top left is the 'uspto' logo. Below it, the text 'Patent Trial and Appeal Board' is centered. A navigation bar contains links for 'Home', 'Contact PTAB Admin', and 'Search'. The main content area is titled 'Log In' and features a 'Welcome to PTAB E2E' message. Below the welcome message, it states: 'This system currently handles Inter Partes Review (IPR), Post Grant Review (PGR), Covered Business Method Patents (CBM), and Derivation AIA Review (DER) Trials.' There are two input fields: '\* Username' with the placeholder 'Enter your username' and '\* Password' with the placeholder 'Enter your password'. A blue 'Log In' button is positioned below these fields, with a 'Forgot Password?' link to its right. At the bottom of the 'Log In' box, a 'Create an account' link is highlighted with a red rectangular border.

Figure 1: PTAB E2E Home screen

The “Register a New Account” form will appear, where the user will be asked to register for a PTAB E2E account by entering information that will be used to create a PTAB E2E user account. All fields that have an asterisk next to the field name are required. See Figure 2: Registration Page for new External Users below.

**Personal Information:** First Name, Last Name and Phone Number are required fields. The phone number must be entered using numbers only, e.g. “7031235555”.

**Account and Security:** Email will be used as the PTAB E2E username, so make sure that the email address is associated with an individual and is not a group email address. The password must: (a) contain at least twelve (12) non-blank characters, (b) use both English uppercase and lowercase letters (A-Z, a-z), and (c) use a mix of letters, numbers, and special characters (!,\$,#,@,0-9).

**For Counsel Only:** If the user is registered to practice before the USPTO, they must enter their USPTO Registration Number (without any commas, e.g. “10000”). If the user belongs to an organization or law firm, the name of the company or organization should be entered in the Organization Name field.

The screenshot shows the "Patent Trial and Appeal Board" registration page from the United States Patent and Trademark Office. The page title is "Patent Trial and Appeal Board" and the subtitle is "United States Patent and Trademark Office". The main heading is "Register a New Account".

The form is divided into three sections:

- Personal Information:** Includes fields for First Name, Middle Name, Last Name, and Phone Number. The First Name, Last Name, and Phone Number fields are marked with an asterisk, indicating they are required.
- Account and Security:** Includes fields for Email, Confirm Email, Password, and Confirm Password. All four fields are marked with an asterisk, indicating they are required.
- For Counsel Only:** Includes fields for USPTO Registration Number and Organization Name. The USPTO Registration Number field has a small icon and the text "Leave blank for pro hac vice".

At the bottom of the form, there is a "Cancel" button and a "Register" button. Below the buttons, there is a checkbox labeled "I'm not a robot" and a small image of a robot. Below the checkbox, there is a warning: "Misuse of a United States Government computer system is a crime. 18 U.S.C 1030." At the very bottom of the page, there is a link: "Already have an account? Log in".

Figure 2: Registration Page for new External Users

Before the user can click on the “Register” button, he or she needs to confirm that they are “not a robot” by clicking on the “I’m not a robot” box and following the reCAPTCHA prompt successfully. See Figure 3: Account Creation with reCAPTCHA Images for example. **NOTE: If the wrong answers are selected or too much time passes before the “Verify” button is clicked, the reCAPTCHA prompt will reset and new reCAPTCHA prompt will be displayed.**

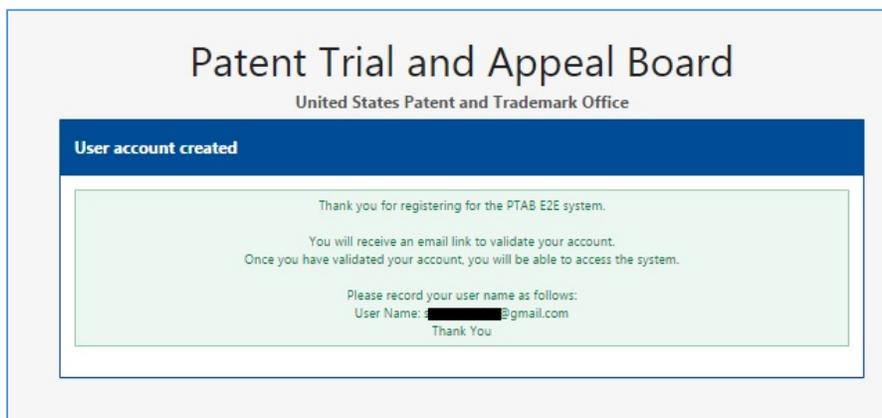
The screenshot shows a registration form with the following sections:

- Personal Information:** Fields for First Name (Janeish), Middle Name, Last Name (Doe), and Phone Number.
- Account and Security:** Fields for Email (raven.nuckols@uspto.gov), Confirm Email, Password, and Confirm Password.
- For Counsel Only:** Fields for USPTO Registration Number (marked with a # and 'Leave blank'), and Organization Name.

A reCAPTCHA overlay is displayed in the center, containing the instruction: "Select all images with street numbers. Click verify once there are none left." The overlay shows a 3x3 grid of images. The top-left image contains the number "1264". The middle-left image contains the number "29". The bottom-left image contains the number "100". The bottom-right image contains the number "1". A red square highlights the top-left image. At the bottom of the overlay, there is a "Verify" button and a "Report a problem" link.

Figure 3: Account Creation with reCAPTCHA Images

A confirmation message will appear when registration for the PTAB E2E account is successful. See Figure 4: Post Registration Notification below.



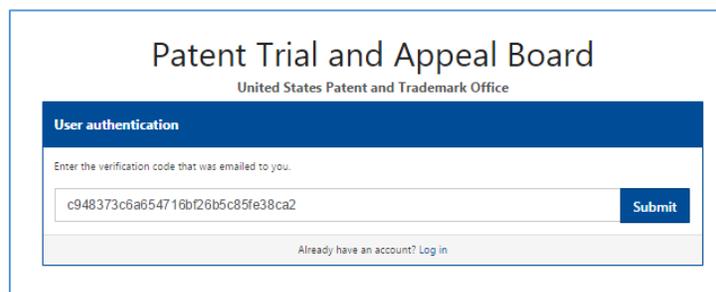
**Figure 4: Post Registration Notification**

In addition to the confirmation message, an email from [PTABE2E\\_System@uspto.gov](mailto:PTABE2E_System@uspto.gov) will be sent to the user's email account with a hyperlink in order for the user to validate their email and authenticate their account. The user must open the email and click on the hyperlink (See Figure 5 below) **NOTE: If Google Chrome is not the user's default browser, the hyperlink must be copied and pasted into a Google Chrome browser page.**

Please click the link to activate your account <https://ptab-ftg.etc.uspto.gov/#/activate?activationToken=c948373c6a654716bf26b5c85fe38ca2>

**Figure 5: Validation Email Link**

The hyperlink will direct the user to the "User authentication" page where the user must click on the "Submit" button (see Figure 6) to activate their account, after which the email address (as the Username) and password may be used to login to PTAB E2E.

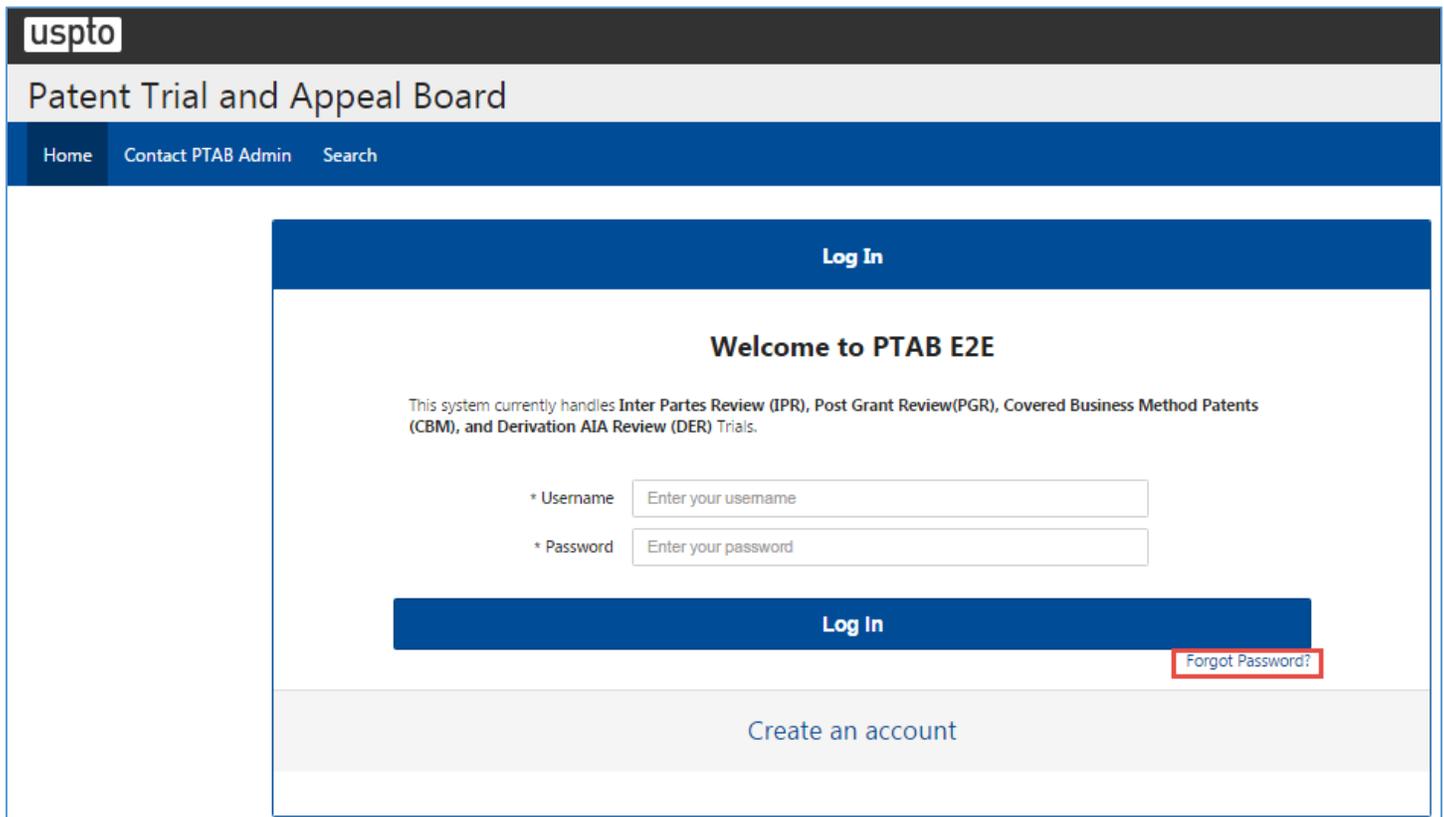


**Figure 6: User Validation**

If the user does not receive a verification email link from PTAB E2E, he or she should contact PTAB at 571-272-7822 or email [PTABE2EADMIN@uspto.gov](mailto:PTABE2EADMIN@uspto.gov) for assistance.

## 1.2 Forgotten Password and Resetting Passwords

If a user has forgotten their password or needs to reset a password, he or she should click on the 'Forgot Password' link on the PTAB E2E home screen, which is located to the lower right of the Login box directly below the Log In button. See Figure 7 below.



The screenshot displays the PTAB E2E login interface. At the top left is the 'uspto' logo. Below it is the header 'Patent Trial and Appeal Board'. A navigation bar contains 'Home', 'Contact PTAB Admin', and 'Search'. The main content area is titled 'Log In' and 'Welcome to PTAB E2E'. It includes a description of the system's capabilities and two input fields for '\* Username' and '\* Password'. A blue 'Log In' button is positioned below the fields. To the right of the button, a red-bordered link labeled 'Forgot Password?' is visible. At the bottom of the login area is a 'Create an account' link.

Figure 7: Forgot Password Link

When the Account Assistance page displays, enter the user's registered email address and click on the "Retrieve my information" button. See Figure 8 below.

The screenshot shows the 'Account Assistance' page of the Patent Trial and Appeal Board. At the top, it says 'Patent Trial and Appeal Board' and 'United States Patent and Trademark Office'. Below that is a blue header with the text 'Account Assistance'. The main content area contains the following text: 'Enter the email address associated with your PTAB account, then click Continue. We will email you a link to a page where you can create a new password.' Below this is a text input field labeled 'Email' containing the text 'createaccountat@gmail.com'. Underneath the input field is a blue button labeled 'Retrieve my information'. Below the button is a yellow box with the text: 'Forgot or changed your email address? If you have forgotten or changed your email address associated with your PTAB account, you may contact USPTO for help restoring access to your account.' At the bottom of the page is a 'Log In' link.

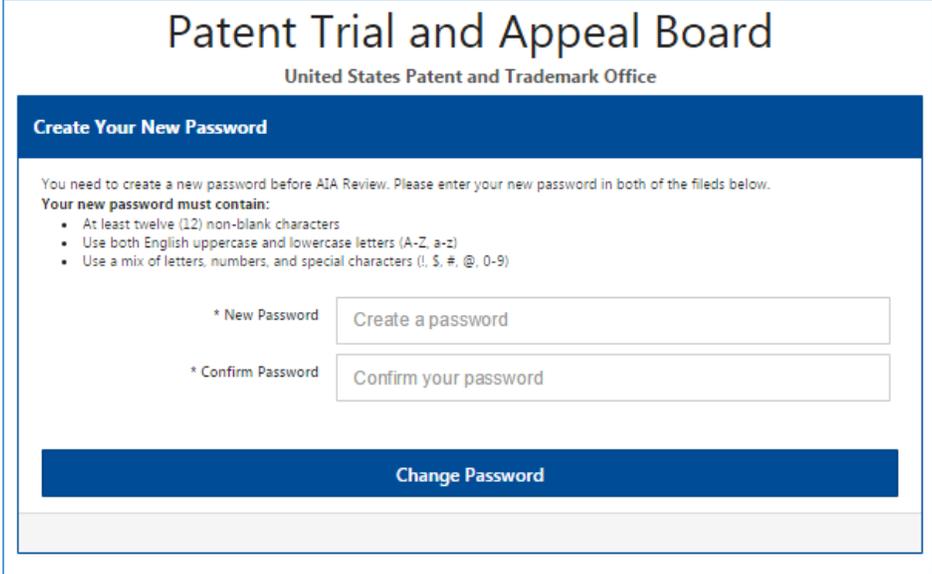
**Figure 8: Password Retrieval**

A confirmation message will appear (see Figure 9) and an automatically generated email will be sent to the user's registered email address.

The screenshot shows the 'User authentication verified' page of the Patent Trial and Appeal Board. At the top, it says 'Patent Trial and Appeal Board' and 'United States Patent and Trademark Office'. Below that is a blue header with the text 'User authentication verified'. The main content area contains a green box with the text: 'Please check your email you will receive a link from PTAB E2E! Click on the link and proceed to reset your password.'

**Figure 9: Password Retrieval Verification**

The user must retrieve the email sent from [PTAB E2E\\_System@uspto.gov](mailto:PTAB E2E_System@uspto.gov), click the link and enter a new password (see Figure 10). The new password must be entered twice and then submitted by clicking on the “Change Password” button. **NOTE: The previous password may be NOT used.**



The screenshot shows a web form titled "Patent Trial and Appeal Board" from the "United States Patent and Trademark Office". The form is for "Create Your New Password". It includes instructions: "You need to create a new password before AIA Review. Please enter your new password in both of the fields below." and "Your new password must contain:" followed by three bullet points: "At least twelve (12) non-blank characters", "Use both English uppercase and lowercase letters (A-Z, a-z)", and "Use a mix of letters, numbers, and special characters (!, \$, #, @, 0-9)". There are two input fields: "\* New Password" with the placeholder "Create a password" and "\* Confirm Password" with the placeholder "Confirm your password". A blue button labeled "Change Password" is at the bottom.

**Figure 10: Creating a new password**

**Note:** Users who have bookmarked PTAB E2E pages with their previous login credentials may need to clear those bookmarks after resetting their passwords.