



Fee Payment System Replacement

Customer Survey Results

June 2015

Last fall, we asked you to share your needs and preferences for new USPTO fee payment tools. We needed your input on what features would be most helpful and what resources you'd need to start using the new tools. Your response was outstanding—thank you!

The USPTO is preparing to release **Financial Manager** and the **Patent Maintenance Fees Storefront**, two new online fee payment tools that offer much of the convenience and functionality you've requested.

Who we heard from...



Law Firm Representatives

In-House Counsel

Independent Inventors

Finance Representatives

Hundreds of customers responded to the USPTO Fee Payment System Replacement User Survey, representing a range of stakeholder groups and USPTO fee payment needs.

Many were law practitioners representing intellectual property firms. Among these were attorneys, legal assistants, and legal administrators. We also received input from paralegals, patent agents, and office managers.

Other respondents identified themselves as independent or pro se inventors, corporate in-house counsel, and accounting/finance representatives.

What we learned...

1

You like doing business with the USPTO online.

2

You need itemized documentation of fee payments.

3

You want to know that your accounts are safe and secure.

4

With the right help, you'll be ready to use our new tools.

UNITED STATES
PATENT AND TRADEMARK OFFICE



What we learned...

1

You like doing business with the USPTO online.

Most customers use electronic payment methods as a primary and secondary means of paying fees at the USPTO. Customers who don't pay 100% of their USPTO fees online often use another means of payment only when they experience technical difficulties or if paper filing is required.



When Financial Manager goes live, you'll be able to quickly pay fees using a stored payment method. Deposit accounts are also going paperless—you'll be able to open and manage them entirely online.

2

You need itemized documentation of fee payments.

While the reason behind this need varies between customer groups, it's clear that itemized documentation is important for your business. Itemized documentation helps customers with account reconciliation, client billing, and general record keeping to ensure that intellectual property remains protected.



In Financial Manager, you'll be able to download detailed reports about each transaction you've made with the USPTO. The Patent Maintenance Fees Storefront will also produce itemized receipts for each patent.

3

You want to know that your accounts are safe and secure.

Our customers understand the importance of account security and are interested in the strategies we've used to make sure that sensitive data remains safe. Increased accountability is also a priority—this calls for functionality to reduce uncertainty and help keep track of who did what, when.



Sensitive information isn't visible to anyone in Financial Manager. Even better, the new user permission features gives you control over who can access and help manage your stored payment methods.

4

With the right help, you'll be ready to use our new online tools.

Currently, most customers are "comfortable" or "very comfortable" conducting business with the USPTO online. With a few key resources, customers said that completing and managing fee payments online would be even easier. The most frequently requested resources were a user guide and a call-in help desk.

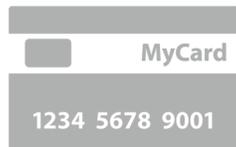


Visit us online today to access a list of FAQs about Financial Manager. Over the next few months, we'll provide additional resources to help you transition to Financial Manager and the Patent Maintenance Fees Storefront.

What's next...

Financial Manager

When Financial Manager goes live, you'll have fast and easy access to improved fee payment management services and information. You'll be able to:



Store Payment
Methods



Assign User
Permissions



Receive Email
Notifications



Generate Custom
Reports

The current [Financial Profile](#) tool will be replaced by the reporting features offered in Financial Manager. Deposit account holders will also be able to manage all deposit account activities online. This includes administrative changes, EFT replenishments, transfers, withdrawals, and closures. Online access to monthly statements and customizable reports will also make it easier to track payments and account activity.

Patent Maintenance Fees Storefront

Financial Manager will launch alongside a new Patent Maintenance Fees Storefront. In the new storefront, customers will be able to:



Look up one or multiple
patents at once



Review maintenance fees
and due dates



Download an itemized
receipt for each patent

The new Patent Maintenance Fees Storefront will be the first of many storefronts to allow Financial Manager customers to check out using a stored payment method. By the final release of Financial Manager, you'll be able to complete all of your USPTO financial activities online—with speed and accuracy.

Visit us online!

Go to www.uspto.gov/FinancialManager to learn more about Financial Manager today. There you can browse our Frequently Asked Questions and get more information about the USPTO's transition to Financial Manager.