



# USPTO Financial Manager

## Introduction to Payment Method Migration

For Existing Financial Profile, Deposit Account, and EFT Holders

February 2016

When Financial Manager is released, you'll be able to quickly migrate payment methods you've already established with the USPTO using any of our three migration options. Migrating your existing payment methods is fast and easy—it takes just 30-90 seconds.

Financial Manager offers three payment method migration options:

### Financial Profile Migration Wizard

#### Migrate Your Profile

Migrate credit/debit cards, deposit accounts, and/or EFTs stored in Financial Profile

#### What you'll need:

- Financial Profile username and password
- Deposit account authorization and access codes
- EFT profile name and password

#### Migration Tip:

If you currently have multiple payment methods stored in Financial Profile, you'll be able to select which one(s) you'd like to migrate.



Deposit Account

#### Add Existing

Migrate a single deposit account

#### What you'll need:

- Deposit account number
- Deposit account authorization and access codes

#### Migration Tip:

If you currently have multiple deposit accounts not stored in Financial Profile, you can repeat the Add Existing process to add each of your deposit accounts.



Electronic Funds Transfer

#### Add Existing

Migrate a single electronic funds transfer (EFT)

#### What you'll need:

- EFT profile name and password

#### Migration Tip:

If you currently have multiple EFTs not stored in Financial Profile, you can repeat the Add Existing process to add each of your EFTs.

UNITED STATES PATENT AND TRADEMARK OFFICE





# Introduction to Payment Method Migration

## For Existing Financial Profile, Deposit Account, and EFT Holders

## Getting Started

### Step 1: Create your uspto.gov accounts

To access Financial Manager, each user will need to create a uspto.gov account. Your uspto.gov account will one day be your primary means of accessing USPTO services and applications online. After creating a uspto.gov account, you will be ready to sign in to Financial Manager and begin migrating your existing payment methods. You'll be able to create your uspto.gov accounts when Financial Manager goes live.

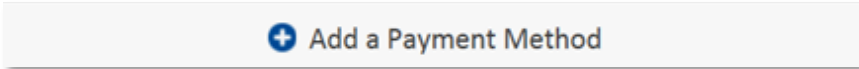
### Step 2: Designate an Administrator to migrate first

We recommend having one Administrator migrate all of your organization's existing payment methods. That user can then add other uspto.gov account holders to the payment method and assign permissions in a manner that best supports your business processes.

The first user to migrate a payment method will receive all **user permissions** by default. Subsequent users to migrate deposit accounts and EFTs will receive limited permissions.

### Step 3: Migrate existing payment methods to Financial Manager

Using the option(s) that best suits your organization, the designated Administrator will be able to sign in and quickly migrate existing payment methods. Look for the Add a Payment Method button to get started.



+ Add a Payment Method

### Step 4: Add users and assign user permissions

In Financial Manager, you'll be able to look up and add other uspto.gov account holders from your organization to each of your payment methods. When you add someone to your payment method, you'll be asked to select which user permissions you'd like the user to have. You can use our **Introduction to User Permissions** to decide which permissions to assign users within your organization.

Consider adding an additional Administrator to each payment method to help add users in large organizations. Users may also self-associate with payment methods using one of the migration options, however this will limit your control over the permissions initially assigned to those users.



# Introduction to Payment Method Migration

## For Existing Financial Profile, Deposit Account, and EFT Holders

## Helpful Hints

### Requirements and deadlines for storing deposit accounts and EFTs

Immediately after the release of Financial Manager, you will still be able to pay fees by entering your current deposit account and EFT credentials (i.e. deposit account access code or EFT profile name and password). **After this temporary transition period, you will be required to store and manage your deposit accounts and EFTs in Financial Manager.**

At that time, only users with Fee Payer permission for your payment method will be able to use it for payment. The current deposit account authorized user list will also become invalid. Migrating as soon as possible will ensure that you do not miss the migration deadline. The migration deadline will be posted on [www.uspto.gov/FinancialManager](http://www.uspto.gov/FinancialManager) after Financial Manager goes live.

### Post migration recommended actions for Administrators

Once you've migrated all of your existing payment methods to Financial Manager, we recommend taking a few steps to make sure your information is accurate and secure:

1. Add a back-up Administrator to help manage each payment method.
2. Verify the correspondence/billing address associated with each payment method.
3. Confirm that user permissions are assigned in a manner that best suits your needs.
4. For deposit accounts, set up your withdrawal and replenishment options. You may choose to allow Funds Managers to withdraw via check, EFT, or not at all. To enable online replenishments, ensure Funds Managers are assigned Fee Payer permission on an EFT.
5. For EFTs, ensure each Fee Payer creates their own unique EFT Profile and Password prior to attempting payment during the temporary transition period.

### Migrating and storing credit/debit cards

You will not be required to store credit/debit cards in Financial Manager, however doing so will provide a more efficient payment experience and enable reporting features. If multiple uspto.gov account holders migrate a credit/debit card using the Financial Profile Migration Wizard, these users will not be linked in Financial Manager. We suggest having one Administrator migrate or store the card and add other users.