



# USPTO Financial Manager

## Introduction to User Permissions

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### Overview

The USPTO is preparing to release Financial Manager, a new online fee payment management tool. With Financial Manager, you can store electronic payment methods and assign user permissions, which allow other Financial Manager users to perform **specific actions** with your payment method. This guide will help you identify which permissions to assign users within your organization when Financial Manager goes live.

#### Administrators can...

Manage your stored payment method's administrative settings and permissions.

#### Funds Managers can...

Add, remove, and transfer deposit account funds.  
*(deposit accounts only)*

#### Fee Payers can...

Submit fee payments to the USPTO using your stored payment method.

#### Reporters can...

View and download reports and monthly statements for your stored payment method.

Financial Manager gives you the freedom to assign permissions in a manner that best **supports your business** process. For example, your legal administrators may be Fee Payers, while members of your accounting team may be Reporters. Each user may have **one or multiple permissions** for each stored payment method. You can also quickly **remove a user** and be confident that they no longer have access to your payment method.

Be among the first to receive news and updates about Financial Manager—  
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UNITED STATES  
PATENT AND TRADEMARK OFFICE





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### Cheat Sheet

	Administrator	Funds Manager	Fee Payer	Reporter
View basic information about the payment method	✓	✓	✓	✓
View administrative history for the payment method	✓			
Modify payment method details <i>(e.g. billing address)</i>	✓			
Close or delete the payment method	✓			
Grant and remove user permissions	✓			
Manage deposit account withdrawal destination options	✓			
View recent transactions	✓			✓
Add/withdraw funds to/from a deposit account		✓		
Transfer funds between two deposit accounts		✓		
Pay fees using the stored payment method			✓	
Generate and download transaction reports				✓
View and download monthly statements				✓

For additional information, visit us online at [www.uspto.gov/financialmanager](http://www.uspto.gov/financialmanager)