Create New Customer Number

PAIR Administration
PAIR Administration Overview

PAIR Administration is a new set of functionality available in Private PAIR to allow users to self-administer a number of routine administrative tasks that previously required the submission of a form that then required manual processing. With the new PAIR Administration functions, requests will be processed immediately. This document will provide guidance on how to create a new customer number through Private PAIR.

Steps for Creating a New Customer Number

The following steps will show you how to create a new customer number in Private PAIR.

PAIR Main Search Screen

1. From the Private PAIR Select New Case page, expand the “PAIR Administration” menu

2. Select “Create New Customer Number” and then Continue

Create New Customer Number

On the “Create New Customer Number” screen, users will have the option to import current address information and, for registered practitioners, attorney information from a customer number that is currently associated to the user’s digital certificate or enter all the fields necessary to request a new customer number.
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1. To import address information of a current customer number into the new customer number, select a customer number at the top of the form next to Import the address details of a Customer Number currently assigned to your Public Key Infrastructure (PKI) certificate and select Import.
   a. Once the data is imported, you may make changes to any of the address fields.

2. To import the list of registered practitioners that are associated to a current customer number into the new customer number, select a customer number next to Import the list of registered attorneys, of a Customer Number, currently assigned to your Public Key Infrastructure (PKI) certificate and select Import.
   a. Once the list of attorneys is imported, you may make additions or deletions to the displayed list of registered practitioners. A maximum of 100 registration numbers can be imported to the new customer number.
   
   Note: Independent inventors creating a new customer number will not see the option to import attorney registration numbers.

3. If a customer number or list of attorneys is not imported, the following fields need to be completed:
   a. Firm or Individual Name Line 1
   b. Address Line 1
   c. City
      i. If the state is not available in the drop down menu, add the state next to the city
   d. Country
   e. Telephone

| *Firm or Individual Name Line 1 |
|---------------------------------
| Firm or Individual Name Line 2 |
| *Address Line 1                 |
| Address Line 2                  |
| *City                           |
| State                           |
| Zip                             |
| *Country                        |
| Country US - UNITED STATES      |
| *Telephone                      |
4. To associate your registration number to the customer number, make sure the box next to Please associate my Registration Number to this Customer Number is checked.
   a. Practitioners creating new customer numbers will not be associated to the new customer number unless the check box is selected.

   Please associate my Registration Number to this New Customer Number

5. Add any additional registration numbers in the available boxes below Please add the following Registration number(s) to the New Customer Number.

   *Note:* A maximum of 100 practitioner numbers can be added.

6. Select the outgoing correspondence mode, postal mail or notification via e-Mail (e-Office Action). If notification via e-Mail is selected, at least one email address is required.

   Please Select Outgoing Correspondence Mode
   - [ ] Receive Correspondence via Postal Mail
   - [ ] Receive Correspondence Notification via e-Mail

7. Complete the required signatory and point of contact information.
   a. S-Signature
   b. Name
   c. Registration Number (only applicable to registered practitioners)
      i. Registration number will be auto-filled based on the PKI certificate holder
   d. Point of Contact Information
      i. Name
      ii. Telephone Number
      iii. Email Address

8. Once the form is complete, you can Preview your request for submission, Save the request for later submission, or Return to the Main Private PAIR Browser.
a. Upon saving the request, the request will be available for seven calendar days on the main PAIR screen under PAIR Administration and View Saved and Completed Requests. If the request is not submitted within seven calendar days, the request will be deleted.

b. Upon selecting Preview, the system will check to ensure all required fields have been completed. If required data is omitted, an error message will be displayed informing the user what information is missing. If the user has added practitioner registration numbers, the system will check to confirm the registration number is valid and the practitioner is in an Active status with the USPTO.

c. Upon selecting to return to the main Private PAIR browser, the New Customer Number request window will close and the user will return to Private PAIR. Please note that all unsaved data will be lost.

9. On the Preview screen, you will be given the chance to review all data entered, return to the data entry page to edit your request, or submit the request to the USPTO.

10. Once the request is processed, you will be presented with a confirmation screen that will contain your new customer number and all of the associated details for the newly assigned number.
11. The customer number will be added to the user’s PKI certificate and will be available in your drop down menus on the main Private PAIR search screen.
   a. For registration numbers added to the new customer number, the system will check to see if each individual added to the customer number has a PKI certificate assigned to them. If so, this new customer number will also be added to his/her PKI certificate as well.

**Creating a Customer Number for Maintenance Fee Usage**

For registered practitioners wanting to create a customer number that will be used to designate the maintenance fee address of an application, create the new customer number using the maintenance fee address details without any registration number assigned. After the new customer number has been created, use Update Application Address to designate the maintenance fee address to the desired application.
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View Saved and Completed Requests Screen

By using the “View Saved and Completed Requests” search, Private PAIR users will be able to retrieve previously saved requests for up to seven days and submitted requests for up to the past 90 days.

To view the request, click on the Request ID hyperlink, and the request will be open.

Questions and Support

If you have any questions, please contact the Patent Electronic Business Center (EBC) at 866-217-9197 (toll-free) or 571-272- 4100 from 6 a.m. to 12 Midnight Eastern Time, Monday - Friday or e-mail the EBC at ebc@uspto.gov.