EFS-Web Fee Payment

Quick Start Guide

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UNITED STATES
PATENT AND TRADEMARK OFFICE

uspto

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1. About Financial Manager

EFS-Web has integrated with Financial Manager, the USPTO's new online fee payment management tool. Financial Manager, provides:

- **Stored Payment Methods** – store and manage credit/debit cards, deposit accounts, and EFT accounts online.
- **User Permissions** – assign permissions, allowing Financial Manager users to access, use, and/or manage your stored payment methods.
- **Generate Reports** – create and export customized transaction reports in Excel, PDF, or CSV formats, including recent transactions and monthly statements.

With Financial Manager, EFS-Web filers gain an additional payment method -- stored payment methods using the new payment page.

> **NOTE!** The existing EFS-Web payment process will continue to be available in the short-term to allow customers to transition to the new payment system, but will eventually be phased out.

EFS-Web, Financial Manager, and the new USPTO payment page work best in Internet Explorer (version 11) and Firefox (version 42). Chrome is unsupported in EFS-Web.

2. Selecting Payment Method in EFS-Web

The e-filing process in EFS-Web is unchanged. In EFS-Web for Registered e-Filers, you will continue to use your PKI digital certificate to login. In EFS-Web for Unregistered e-Filers and EFS-Web Contingency, you will continue to provide your name and email in order to file. However, on the EFS-Web Pay Fees screen, you now have the added option to pay using the New USPTO Payment Page[1] or the Current USPTO Payment System[2]. Using the Current Payment System, you will not see a change in the EFS-Web payment process.

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To pay fees using the new payment page, select the "Pay with the New USPTO Payment System" button on the EFS-Web Pay Fees screen. This will redirect you to the new payment page sign in screen.

3. Entering the New USPTO Payment Page: Sign In or Pay as a Guest

On the new USPTO payment page, you will be able to choose to "Sign in" or "Pay as a Guest."

If you choose to "**Sign in**", you must use your uspto.gov account credentials. If you do not have a uspto.gov account at the time of payment, please select "Pay as a guest" so that your EFS-Web payment and submission can be completed successfully.

- Refer to [Section 6](#) of this guide for information on how to set up a uspto.gov account.
- Signed-in users may submit a payment using any payment method stored in Financial Manager you have Fee Payer permission for.
- During the Financial Manager transition period, signed-in users will also be able to manually enter deposit account number and access code, EFT profile name and password, or credit/debit card information for payment. After that, only signed-in users with Fee Payer permission for a deposit account or EFT will be able to use these payment methods for payment. You will not be required to store a credit/debit card in Financial Manager.

If you choose to "**Pay as a guest**," you'll be able to manually enter your deposit account number and access code, EFT profile name and password, or credit/debit card information for payment.

- After the Financial Manager transition period, only signed in users with Fee Payer permission for a deposit account or EFT will be able to use these payment methods for payment. You will not be required to store a credit/debit card in Financial Manager; after

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the Financial Manager transition period, guest users may pay EFS-Web fees via credit/debit card.

4. Paying Fees on the New USPTO Payment Page

After selecting "Sign In" or "Pay as guest," on sign-in screen for the new USPTO payment page, you will be directed to the Make a Payment screen, where calculated fees are displayed and your payment method may be selected or manually entered. After entering data for the corresponding payment method, click the "**Submit Payment**" button to complete the payment process.

Order Details ⓘ

TOTAL
$280.00

Sale Item Reference #	Attorney Docket #	Fee Code	Item Price	Qty	Item Total
99999999		1011	$280.00	1	$280.00

Payment Information

Approved for use through 1/31/2018. OMB 0651-0043.

Required fields *

Payment Options * ⓘ
  ○ Credit/Debit Card
  ○ Deposit Account
  ○ EFT

Why can't I add a fee preauthorization to this order?

[Submit Payment] [Cancel]

Upon completion of this process you will be directed to EFS-Web where a receipt will be presented as confirmation of your submission.

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5. Providing a General Deposit Account Authorization on the new USPTO payment page

On the new USPTO payment page, as a signed-in user, you have the option to add a fee preauthorization, also known as a general deposit account authorization, to your EFS-Web submission. Your uspto.gov account must have Fee Payer permission for the deposit account stored in Financial Manager that is used for the fee preauthorization. Check the box to add a fee preauthorization, choose the deposit account to use, and select the fee preauthorization(s) to add.

Fee preauthorization is not available when you pay as a guest. Alternative options for providing a fee preauthorization for EFS-Web fee payments include:

- Filing a request as a follow-on submission via EFS-Web for Registered eFiler
- Faxing a request to the USPTO Central Facsimile at 571-273-8300
- Mailing a request via USPS first class mail with a certificate of mailing in accordance with 37 CFR 1.8, or via USPS Priority Mail Express® in accordance with 37 CFR 1.10

6. Viewing Your Financial Manager Report

In Financial Manager, signed-in users with Reporter permission for a stored payment method can generate transaction reports to reconcile their EFS-Web Acknowledgement Receipt. The

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EFS-Web Payment Confirmation Number appears as the Transaction ID in Financial Manager reports and the EFS-Web Application Number appears as the Sale Item Reference Number on Financial Manager reports.

7. Setting Up a USPTO.gov Account

To pay EFS-Web calculated fees using a stored payment method from Financial Manager, you will first need to create a uspto.gov account. Refer to the uspto.gov Account Frequently Asked Questions for more information.

After creating your uspto.gov account, you can sign in to Financial Manager using your uspto.gov account email address and password. In Financial Manager, you can migrate existing payment methods or create/add new credit/debit cards, deposit accounts, or electronic funds transfer (EFT) accounts. Note that a uspto.gov account cannot be used to sign-on to EFS-Web for Registered eFilers; you must continue to use your PKI digital certificate.

On the Financial Manager Information page, you can find the following helpful information:
- About Financial Manager: describes Financial Manager's key features
- Financial Manager Quick Start Guide: outlines how you can quickly create your uspto.gov accounts, migrate payment methods to Financial Manager, and assign user permissions
- Fee Payment Transition Resources: provides helpful resources to help you understand and transition to Financial Manager
- Financial Manager Comprehensive User Guide: features step by step instructions on how to use Financial Manager
- Frequently Asked Questions (FAQs): addresses your most pressing questions about Financial Manager

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8. Need Help?

Contact the [Electronic Business Center](#), for assistance with filing your electronic patent application submissions via the Electronic Filing System (EFS-Web):
(866) 217-9197 (toll-free)
(571) 272-4100 (local)
ebc@uspto.gov
6:00 a.m. to 12:00 midnight, Eastern Time, Monday through Friday

Contact the [USPTO Contact Center](#), for assistance using Financial Manager or the new USPTO payment page:
(800) 786-9199 (toll-free) (select option 3, then option 4)
(571) 272-1000 (local)
(800) 877-8339 (TTY)
FeesHelp@uspto.gov