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1. Introduction


1.1 Purpose

The purpose of this document is to provide a user guide for PTAB customers who will be required to use P-TACTS to work on Interference cases.
2. General Navigation

2.1 Getting Started

1. To get started, type the provided URL for the P-TACTS Interference landing page https://ptacts.uspto.gov/interferences/ui/home into your browser.

*Figure 1 – Welcome to USPTO Patent Trial and Appeal Case Tracking System (P-TACTS) for Interferences landing page*
2. On the right side of the P-TACTS Interference landing page, you have the option to perform an anonymous search without signing in to P-TACTS. You can search by entering the exact Interference, Patent, or Application numbers or the full or partial Party Name.

![Figure 2 – Search Interferences](image)

### 2.2 P-TACTS Sign In

1. Select the “Sign In” drop-down menu in the black banner to access your P-TACTS account and view your docket.

![Figure 3 – Sign in to P-TACTS](image)
2.3 My Docket

1. Upon signing in, you will be taken to “My Docket.” This is a dashboard that displays all of your Interference cases in P-TACTS. On the blue menu banner, you will notice the Search Interferences and Help links:

![Figure 4 – Example P-TACTS Interferences signed in user's My Docket screen](image)

2.4 Search P-TACTS

1. In the Search P-TACTS section, you will have the ability to perform searches while signed into P-TACTS. You can search by entering the exact Interference, Patent, or Application numbers or the full or partial Party Name.

   Application No. (exact search) | Interference No. (exact search) |
   Patent No. (exact search) | Party Name (exact or partial search)

![Figure 5 – Example P-TACTS signed in user's Search P-TACTS screen](image)
2. This search is for cases that you are a party to, and your search results will allow you to access non-public cases and non-public documents (i.e. documents marked parties and board or filing party and board).

2.5 My Docket Table Grid

1. The My Docket table grid lists your docketed cases. Below each column heading, there is a text box that allows you to enter text to filter the information displayed in the table. You can also sort each column in ascending or descending order by selecting the column header.

![Figure 6 - Example P-TACTS signed in user’s My Docket screen](image)
3. Case Viewer

3.1 Case Viewer

1. To access the Case Viewer for each Interference case, go to your docket and select any hyperlinked Interference case number.

![Hyperlinked interference numbers in My Docket takes you to the case viewer for that case](image1)

2. After selecting the hyperlinked Interference case number, the Case Viewer screen will open in a new browser tab. Just below the blue menu bar, you will see a gray global header with the following sections:

- Case #
- Parties
- Last paper filed & date
- Declaration date
- Tech Center
- Related Interferences
- Judgment date (if available)

![Global header of the Case Viewer](image2)
3.2 Sections

1. Just below the gray global header you will see another gray header entitled View application information which displays the following fields:

   - Application #
   - Party type
   - Application title
   - Application filing date
   - Patent #
   - Inventor name
   - Real party in interest

Figure 9 – Example P-TACTS signed in user’s Case Viewer screen, View application information section
2. Below the **View application information** section, you will see a **Papers & exhibits** section.

![Figure 10 – Example P-TACTS signed in user’s Case Viewer screen, Papers & Exhibits section](image)

3. Just below **Papers & exhibits** section, you will see a gray header for **Interference attorneys** with the following fields:

- Application #
- Attorney #
- Attorney name
- Attorney type

![Figure 11 – Interference attorney table](image)
4. Filing Documents

4.1 Filing Documents

1. Filing documents in P-TACTS consists of the following choices:

- Brief
- Change of address
- Designation of backup attorney
- Designation of lead attorney
- Exhibit List
- Motion
- Objections to Evidence
- Opposition
- Other: other court decision
- Other: other
- Power of Attorney
- Real Party in Interest
- Records
- Reply
- Request for Oral Argument
- Request for Rehearing
- Revoke Power of Attorney
- Notice of Appeal
- Notice of Settlement Agreement
- Transcript
4.2 Add Document

1. In the Case Viewer, select the Add document button.

2. Once you select the Add document button, you will see a pop-up window and required fields marked with red asterisks (*). The fields displayed will be the following:

   - Doc type
   - Filing party
   - Paper type
   - Availability
   - Document name
   - Document
Figure 13 – Add documents window
4.3 Add to List and Submit

1. Complete all of the required fields, and notice that the “Add to list” button is now blue and active. You will have the opportunity to select “Clear form” if the information is incorrect. When you ready to upload the document, select “Add to list.”

![Add to list button on Add documents window](image)

2. Once you select the Add to list button, you will see your document in the List of documents table with the following columns:

- Doc #
- Upload date
- Doc type
- Paper type
- Document name
- Pages
3. You will have the option to select the “Cancel and close” or the “Submit” buttons.

![Add documents interface](image)

*Figure 15 – Submit and Cancel and close buttons*

4. Clicking the “Submit” will close the Add documents window and a message will appear confirming successful submission. In addition, you should see your just submitted paper or exhibit in the Papers & Exhibits section.
Figure 16 – Successful document upload
5. Add Attorney

5.1 Add Attorney

1. To add an attorney, go to the Interference attorneys section on the Case Viewer screen and select the Add attorney button. This will open a pop-up window.

![Add attorney button in the Interference attorneys section](image)

2. From the Add Attorney window, you must enter the required information in the following fields:
   - Application #
   - Attorney type
   - Attorney registration #

![Add attorney window](image)
3. From the drop-down menu in the **Application #** field, select the application of the party that attorney will represent.

![Figure 19 – Select application number for attorney](image)

4. In the **Attorney type** section, select the appropriate radio button designating the attorney to be added as lead or backup attorney. See Figure 20.

![Figure 20 – Enter attorney registration number to add attorney](image)

5. The **Attorney registration #** text field allows you to select the attorney you wish to add by entering the USPTO registration number and selecting the **Get info** button. Also note, for further information, the “Search patent attorney/agent” hyperlink, when selected, will take you to the USPTO website’s Office of Enrollment and Discipline (OED) Practitioner Finder webpage.

6. If your search is successful on the OED Practitioner Finder webpage, the attorney’s name, email address, and attorney registration number will be displayed below the search field. You can
then select the **Add attorney** button to complete the process and return you to the Case Viewer screen.

![Figure 21 – Active Add attorney button](image)

7. On the Case Viewer screen, you will see the attorney you just added in the **Interference attorneys** section.

![Figure 22 – Successfully added attorney displayed in Interference attorneys section](image)