



Additional Information

If you are interested in learning more about EFS-Web Best Practices, please visit:

<http://www.uspto.gov/ebc/portal/efs/bestpractices.html>

Training

The EFS-Web "Sandbox" allows e-Filers to preview screens and practice submitting patent applications in a simulated EFS-Web environment. To learn more, visit:

<http://www.uspto.gov/ebc/portal/tutorials.htm>

Access EFS-Web training materials available on the USPTO's EFS-Web Help site: http://www.uspto.gov/ebc/efs_help.html.

Updates

To receive updates on EFS-Web and other USPTO e-Commerce initiatives, please register at:

<http://www.uspto.gov/ebc/optin.html>

Technical Support

For EFS-Web full technical support, contact the USPTO's Patent Electronic Business Center (EBC) from 6 a.m. to 12 a.m. Eastern Time, Monday - Friday:

- **Toll Free Phone: 866-217-9197**
- **Local Phone: 571-272-4100**
- **e-Mail: ebc@uspto.gov**



Get the **POINT** of EFS-Web!

Electronic Patent Filing: Best Practices Guide



Process

INformation Technology



Organizational Culture

Training



Learn what successful Patent e-Filers are saying about the United States Patent and Trademark Office's electronic patent filing system, EFS-Web.

United States Patent and Trademark Office
Commissioner for Patents
P.O. Box 1450
Alexandria, VA 22313-1450
www.uspto.gov

EFS-Web is the United States Patent and Trademark Office's (USPTO) electronic patent filing system that is safe, simple, and secure. Since March 2006, e-Filers have used EFS-Web to file patent applications from their web-enabled computers from around the world. In 2007, several law firms and corporations that have successfully adopted the e-filing system met to share their EFS-Web best practices.

Do You Get the **POINT** of EFS-Web?

Organizations that have adopted EFS-Web on an enterprise level unanimously recognize tangible strategic benefits including enhanced quality, cost savings and savings in staff time.

"We estimate the combined year-in, year-out [savings] is about 20 minutes a submission that our paralegals spend doing other things rather than focusing on whatever the old process was."

- EFS-Web Best Practices Forum Participant

In May, 2007, forty individuals from the patent community (from the top thirty corporate and IP law firm filers) gathered for the EFS-Web Best Practices Forum. Participants developed the following tips specifically to help organizations, like yours, to improve overall efficiency and effectiveness through implementation of an EFS-Web strategy for e-filing.

Get the **POINT** of EFS-Web:

- P**rocess
- O**rganizational Culture
- I**nformation Technology
- T**raining

Process

Transition your existing paper-based filing processes to maximize the benefits of e-filing in your organization.

- **Cross-functional team:** Create a small set of e-filing specialists who can answer internal questions about EFS-Web.
- **Implementation:** Roll out EFS-Web to your organization in stages.
- **Quality control:** Establish a rigorous review process designed to build confidence in electronic filing within your organization.

Organizational Culture

Change your paper-oriented organizational culture to an electronic approach by gaining executive buy-in, as well as the involvement of volunteers and in-house EFS-Web champions.

- **Internal executive champions:** Provide the necessary sponsorship for the adoption of EFS-Web.
- **Promote benefits:** Develop mentors that can assist in emphasizing the benefits of EFS-Web to potential e-filers in your organization.

Information Technology

Involve your office's IT staff from the earliest planning stages to gain their unique perspective on the challenges and benefits of transitioning to an electronic environment and to ensure their support for your attorneys and administrative staff who will be involved in e-filing.

- **Partner with IT:** Provide your IT staff with enough lead time to overcome issues regarding technical implementation issues.
- **First-level technology support:** Utilize your IT staff as a resource that can provide office e-Filers with the necessary training and preparation.

Training

Utilize a combination of in-house materials, USPTO materials and webinars, and one-on-one training to get your people the information they need to file electronically using EFS-Web.

- **Customized training:** Create an internal training program that includes a manual and formalized training agenda.
- **"Go-to" domain experts:** Utilize mentors within your organization to answer questions about e-filing.
- **Learning methods:** Use a combination of group and one-on-one training programs to ensure your organization's success.
- **Ongoing training:** Continue to provide tips on how to use EFS-Web.
- **Incentives:** Provide incentives for those who file electronically in order to develop confidence among skeptics.