1. Search by Customer Number Details

1.1 Description
Customers using the United States Patent and Trademark Office (USPTO) Private Patent Information and Retrieval (PAIR) system can view or print their customer details and request changes to that data. (Note: These changes then are validated and updated in the Patent Application Locating and Monitoring (PALM) system.)

NEW

DESCRIPTION: Customers will be notified of any additions or modifications to their e-mail address – that is, for every addition or change to an e-mail address, Customers will receive test e-mails.

PROCEDURE: When users enter PAIR and click the Customer Number Details radio button, and an addition or modification to the Customer’s e-mail address is made, a test message will be sent to verify that the changes made have been correctly entered into the PALM database.

BENEFIT: Customers of record will receive an electronic notification that will enable them to confirm the changes and effectively correct any errors in e-mail address modifications—an important cost and time-saving feature.

NOTE! For assistance with any of the steps shown in this guide, users can contact the Electronic Business Center (EBC) at the Customer Support Center. Information is shown in the table at the end of this guide (in Section 8).
2. Steps for Accessing Customer Details

To search for applications by customer number, navigate to the Select New Case screen, shown in Figure 2-1 below. (Note the screen below shows a number of the new drop-down features available to Private PAIR users.)

![Figure 2-1 Steps for Viewing Customer Details](image)

Next, scroll down to the Search by Customer Number section, and follow these steps:

1. Choose View Customer Number Details, by clicking the radio button.

2. Choose the desired Customer Number from the drop-down list Select Customer Number. Note that there is a default of “All.”

3. Click on the Search button.
3. Viewing Customer Details

In the Customer Details section you can view Customer Number information such as: Correspondence Address, Correspondence e-Mail, Telephone Numbers, Fax Numbers and Associated Practitioners.

If you would like to change any of the information displayed on the Customer Details screen, click the "Request Customer Data Change(s)" button (shown in Figure 3-1).

NOTE! There is a message in the Customer Details title bar below the tabs that indicates the last time this user entered changes (updates). The message reads: “Last Private PAIR Update: YYYY-MM-DD: (Time recorded in hours, minutes and seconds).”

4. Edit Customer Details

When the Customer Details information displays, a screen similar to the one shown in Figure 4-1 (below) will appear. Changes to the Customer Details made on this screen only pertain to the data stored in the U.S. Patent Application and Location Monitoring (PALM) database. The data changes are not automatically forwarded to the International PCT Authority. The World Intellectual Property Organization (WIPO) requires that changes to its database be submitted directly to that organization by separate petition.
In this section, you will choose the type of notification you would like to receive.

1. You can receive the United States Postal Mail outgoing correspondence notification (the default), or you can receive an e-mail notification. This option is only available to participants in e-Office Action.

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1 You will receive one e-mail notification for each Customer Number that has outgoing correspondence available in Private PAIR each day. The e-mail will be sent when the correspondence is available. In most cases, you will be able to access the
2. This section of the page also allows you to make any changes in the Individual’s Name, Address, City, State, Zip, Country, Telephone, e-Mail and Fax. (Changes to this data will be automatically updated in the PALM database)

3. By checking the box next to an associated practitioner, you may delete any practitioner from your customer number. (Practitioner removals will be automatically updated in the PALM database as well.

4. This section allows you to add the practitioner's Registration Number(s) to associate to your customer number. (Practitioner additions will be reviewed by the EBC personnel before the PALM update is made.

5. Enter the Point of Contact (POC) name, telephone number, and e-mail address of the practitioner requesting the changes. This section will allow you to enter the POC handling the changes.

6. To review changes, press “Preview Changes.” (See Figure 4-1)

5. Reviewing Changes

The Customer Number—Review corrections prior to submission screen will appear, allowing you to view the changes that were made to the Customer Number Details.

![Figure 5-1 Reviewing Changes](image)

correspondence immediately in Private PAIR. There may be times when you receive an e-mail on Saturday or Sunday, and the correspondence will not be available until Monday morning. In this case, however, the start of the response period will still be on the mailroom date recorded in the PALM database.
6. Further Changes—Editing and Transmitting

After reviewing the changes you have made to your customer number data, you can take the following steps.

On this screen, if you see that the changes you made are incorrect, you may:

1. Click the "Edit Changes" button (in Figure 5-1). Make any further changes you think are necessary.

   NOTE! If there are multiple listings of the same name, the user must select one of the names in order to proceed in the system. Also note, if users change an e-mail address, a test e-mail will be sent to verify the address change. In addition, if users choose to opt-out of the e-Office Action program, a message will appear recommending that at least one e-mail address remain for 15 days so that all documents in process will have time to reach their destination. (See “Advisory” in the e-Office Action Quick Start Guide.)

2. If all the necessary Customer Number changes have been made and properly reviewed, you can click on the "Transmit Request to USPTO" to transmit the data.
7. Acknowledgement Page

Once you click on the "Transmit Request to USPTO," your edits(changes are sent to the USPTO and you will receive a Customer Number — Corrections Accepted acknowledgement page, with a date and time stamp (Figure 7-1).

Figure 7-1 Customer Number Details Corrections Acknowledgement Page
8. Questions? Contact Information for EBC

Call, e-mail or send a fax (or letter by regular mail) to the USPTO regarding any questions you may have about the Customer Number Details change process or related matters. You can contact the USPTO Electronic Business Center (EBC) directly using the following telephone numbers or address information. The EBC hours of operation are also noted.

<table>
<thead>
<tr>
<th>Weekday Operation: Monday – Friday: 6 AM - Midnight (Eastern Time)</th>
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<tbody>
<tr>
<td><strong>Telephone:</strong> 1-866-217-9197 (toll-free)</td>
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<tr>
<td>571-272-4100 (local)</td>
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<tr>
<td><strong>E-mail:</strong> <a href="mailto:ebc@uspto.gov">ebc@uspto.gov</a></td>
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<tr>
<td><strong>Fax:</strong> 571-273-0177</td>
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<td>Commissioner for Patents</td>
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