

Create New Customer Number

Quick
Start
Guide

PAIR Administration

UNITED STATES
PATENT AND TRADEMARK OFFICE



Create New Customer Number

PAIR Administration - Quick Start Guide

PAIR Administration Overview

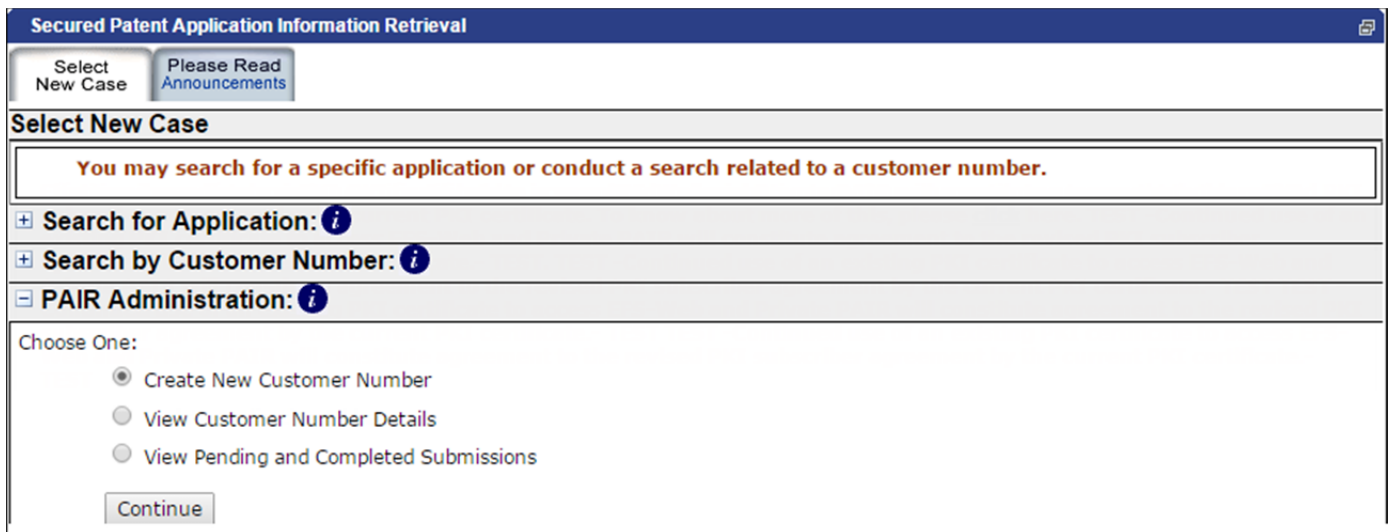
PAIR Administration is a new set of functionality available in Private PAIR to allow users to self-administer a number of routine administrative tasks that previously required the submission of a form that then required manual processing. With the new PAIR Administration functions, requests will be processed 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



The screenshot shows the 'Secured Patent Application Information Retrieval' interface. At the top, there are two buttons: 'Select New Case' and 'Please Read Announcements'. Below this is the 'Select New Case' section, which contains a search bar with the text: 'You may search for a specific application or conduct a search related to a customer number.' Below the search bar are three expandable search options: 'Search for Application:', 'Search by Customer Number:', and 'PAIR Administration:'. The 'PAIR Administration:' option is expanded, showing a 'Choose One:' section with three radio button options: 'Create New Customer Number' (selected), 'View Customer Number Details', and 'View Pending and Completed Submissions'. At the bottom of the expanded section is a 'Continue' button.

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.

Import the address details of a Customer Number currently assigned to your Public Key Infrastructure (PKI) certificate | 59 -> USPTO Test Customer Number | Import

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.

Import the list of registered attorneys, of a Customer Number, currently assigned to your Public Key Infrastructure (PKI) certificate | 59 -> USPTO Test Customer Number | Import

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	<input type="text"/>
Firm or Individual Name Line 2	<input type="text"/>
* Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
* City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/>
* Country	US - UNITED STATES
* Telephone	<input type="text"/>

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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.

Please add the following Registration number(s) to the new Customer Number										
									Add Row	Delete Row

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	
<input checked="" type="radio"/>	Receive Correspondence via Postal Mail
<input type="radio"/>	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

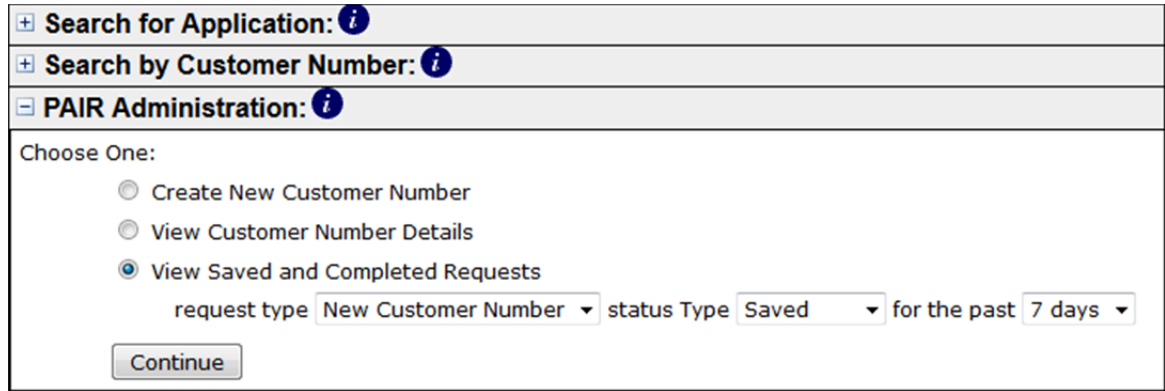
*Signature	<input type="text"/>
*Name	<input type="text"/>
Registration Number	99999
Point of Contact Info	
*Name	<input type="text"/>
*Telephone	<input type="text"/>
*Email	<input type="text"/>

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.

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- 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.



The screenshot shows a web interface for PAIR Administration. It features three expandable sections: 'Search for Application', 'Search by Customer Number', and 'PAIR Administration'. The 'PAIR Administration' section is expanded, showing a 'Choose One:' menu with three radio button options: 'Create New Customer Number', 'View Customer Number Details', and 'View Saved and Completed Requests'. The 'View Saved and Completed Requests' option is selected. Below the menu, there are three dropdown menus: 'request type' set to 'New Customer Number', 'status Type' set to 'Saved', and 'for the past' set to '7 days'. A 'Continue' button is located at the bottom of the expanded section.

- 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.

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Notice of New Customer Number Assignment	
New Customer Number	131344
Request ID	1012
Timestamp Submitted	Apr 20, 2015 12:24:58 PM
Status	Submitted
Customer Number Address	USPTO Test Customer Number 600 DULANY STREET ALEXANDRIA VA 22303 US
Telephone Number	111-222-3333
Fax Number	
e-Office Action Enrollment	
Email Address	Mail PAIR@uspto.gov
Practitioner(s) associated to the new Customer Number	
Practitioner(s) given Private PAIR access to the new Customer Number	
Signature Name	/Signature/ Name
Registration Number	99999
Point of Contact Info	Nam 123-456-7890 email@address.com

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.

+ Search for Application: 

+ Search by Customer Number: 

- PAIR Administration: 

Choose One:

- Create New Customer Number
- View Customer Number Details
- View Saved and Completed Requests

request type status Type for the past

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

PAIR Administration View Saved and Completed Requests					
		Request Type	Customer Number		
		Search Type	All		
		For the past	7		
New Customer Numbers:					
Show 10 entries		Search: <input type="text"/>			
Request ID	Last Updated	Customer Number	Address	Status	
3213	Apr 20, 2015 8:29:20 AM	131253	USPTO Test Customer Number 600 DULANY STREET ALEXANDRIA VA 22303	Submitted	
2537	Apr 14, 2015 6:29:52 PM	131258	USPTO Test Customer Number 600 DULANY STREET ALEXANDRIA VA 22303	Submitted	
2825	Apr 14, 2015 1:26:33 PM	131230	USPTO Test Customer Number 600 DULANY STREET ALEXANDRIA VA 22303	Submitted	
2840	Apr 14, 2015 2:00:02 PM	131252	USPTO Test Customer Number 600 DULANY STREET ALEXANDRIA VA 22303	Submitted	

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.