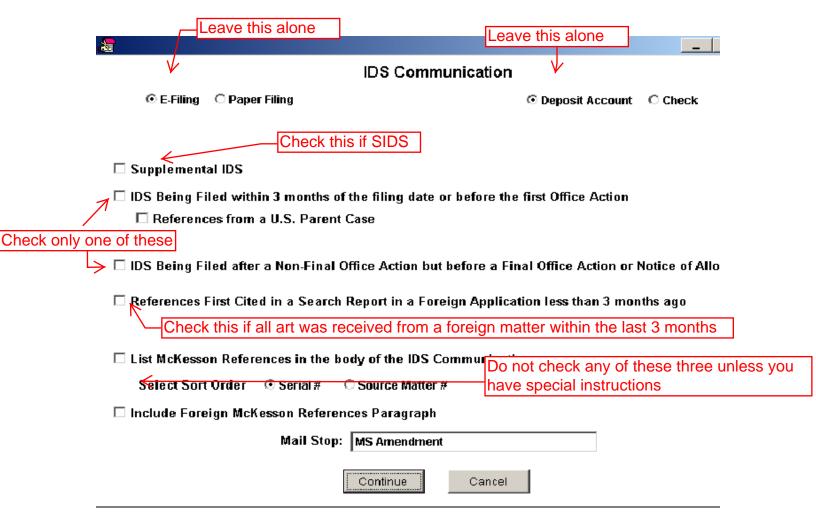
Preliminary work – Reviewing and prepping the matter for an IDS

- 1. Log into FIP
- 2. Go to the matter from which the foreign search report originated.
 - a. Check the references screen to ensure that the foreign search report/prosecution document has been entered as a reference. (It will probably be marked and will not appear if you are using the unmarked filter)
 - b. Determine the deadline for the filing of the IDS/SIDS based on this art (3 months after the document was generated).
- 3. Go the related matters screen find all related pending US matters. Each of these matters may need an IDS/SIDS.
 - a. If a US matters is Abandoned or Issued it does NOT need an IDS/SIDS
- 4. Go to the each US matter that requires an IDS/SIDS
 - a. Check the unmarked references currently in the matter.
 - i. Ensure that the foreign document is entered and is unmarked.
 - ii. Note the references that did not originate from foreign sources (or those that are older than 3 months).
 - b. Check all the related matters for any missing prosecution documents.
 - Check the matter management note to see when the P.D. were last updated. If they have not been updated recently look through the activities and enter any missing art.
 - c. Check to see if the matter has any un-cited US related matters.

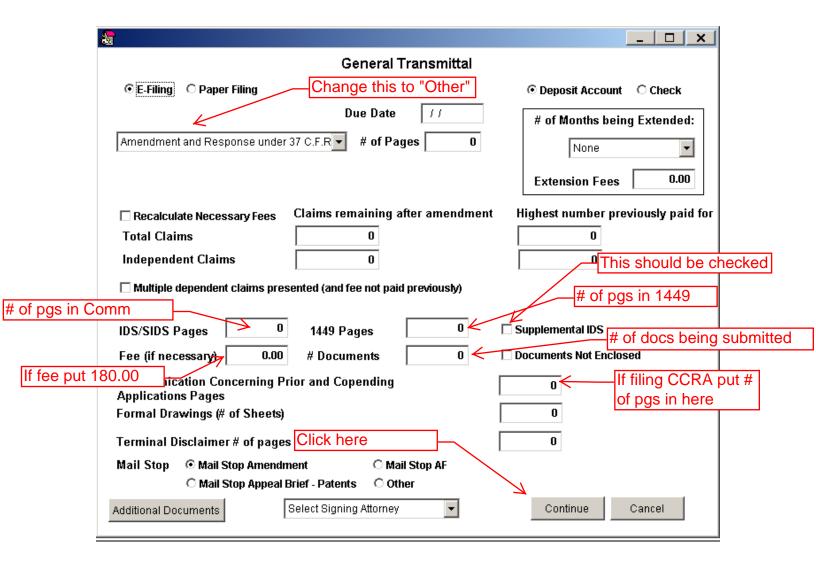
Merging the documents and preparing the IDS

- 1. Open Sidebar
- 2. Click on the "merges" tab
- 3. Enter the matter number into the "Matter #" box
- 4. Check to see that "Merge Roles" is set to IDS-Other
- 5. (If necessary See step 4 c from preliminary work) Click merge next to "Header Communication Concerning Prior or Copending Applications"
 - a. Select any Green (Not Red or Blue) highlighted US applications (NOT PRV or USA)
- 6. Click Merge next to "IDS 1449 Form"
 - a. Note the number of documents in the pop up box (look quickly, it will disappear).
 - b. Thoroughly examine the 1449 look for and fix any errors including Misspelled references, improperly entered references, or any other errors.
 - i. Make all corrections in FIP
 - ii. If you make any corrections re-merge 1449

- 7. Click Merge next to "IDS Communication"
 - a. Fill out the form



- 8. Click merge next to "Transmittal General"
 - a. Fill out the form

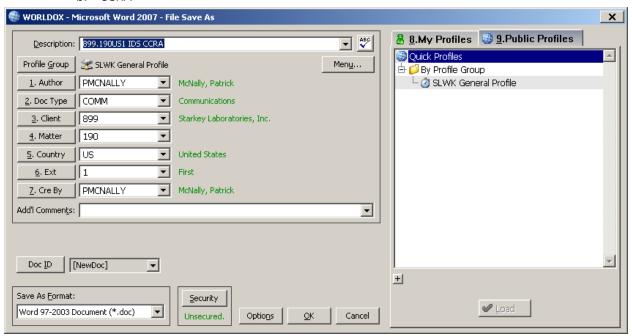


9. Save all documents to Worldox

a. Transmittal



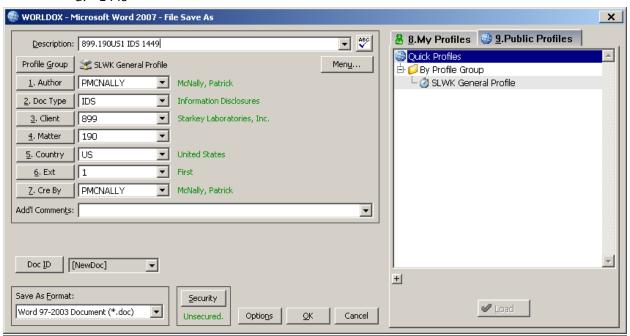
b. CCRA



c. Communication



d. 1449



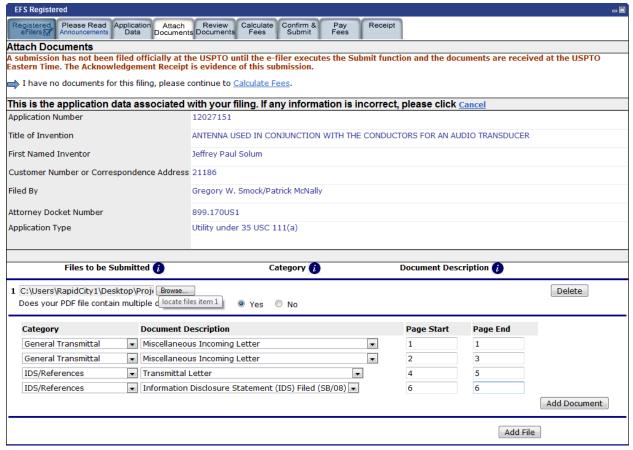
- 10. Download all saved documents from Worldox
- 11. Combine all documents together into one PDF (Order below)
 - a. Xmit
 - b. CCRA
 - c. Comm
 - d. 1449
- 12. Send email to attorney for signature
 - a. CC the IDS Specialist
 - b. Subject line = <Matter Number> Documents for signature
 - i. Add "ASAP" If necessary. Also, if necessary, check the "High Importance Flag"
 - c. Body
 - i. I have prepared a SIDS for <Matter Number> in response to a foreign office action received in a related matter. I prepared the SIDS to cite the received document and all currently unmarked references in FIP. If this is satisfactory, please sign and return the attached document. If not, please let me know what changes you would like made.
 - d. Attach the document
 - e. Send

Filing the SIDS

- 1. Once you have received the signed document back from the attorney you can begin filing.
- 2. Save the signed copy (I recommend creating a folder for each matter)
- 3. Check the document
 - a. Make sure the attorney signed everywhere required
 - b. Make sure there are no errors
 - c. Make sure the month in the signature block is correct
- 4. Add your own signature and name
- 5. Flatten the document (Print through Adobe PDF).
- 6. Go to the matter in FIP
 - a. Check to make sure the status of the matter has not changed
 - b. Go to the references screen
 - i. Make sure there are no new references
 - ii. Download all foreign and NPL references for submission.
 - 1. Check to make sure all references were saved
 - 2. Check to make sure the number of references downloaded matches the number of files in the folder.
- 7. Open Sidebar
 - a. Click on the "Toolbox" Tab
 - b. Click on "IDS Tools"
 - c. Enter the matter number into the "Matter #" box
 - d. Click Locate Folder (Select the folder to which the references were saved)
 - e. Click "Get References"

- f. Click Bulk Rename
- g. Click through prompt
- h. Close sidebar
- 8. Flatten all references
 - a. Set default printer to Adobe PDF
 - b. Highlight all the references
 - c. Right click select "Print"
 - i. Wait this can take a while some times
 - d. Check the resulting references
 - i. Make sure the number of flattened files matches the number of originals.
 - ii. Make sure they are all still renamed
 - iii. Make sure no file is larger than 25 MB

- 9. Open a new window and login to USPTO EFS
 - a. Certification Page
 - i. Check the box for "I certify that I am working under the authority of the certificate holder: <NAME HERE>"
 - ii. Check the box for "Existing application/patent
 - 1. Check the box for "Document/Fees for an existing application
 - a. Fill in the information. This information can be found either on the documents you are filing (Upper right corner) or in the matter in FIP under "Details".
 - iii. Click continue
 - b. Attach Documents Page
 - i. Select the signed PDF fill out the fields appropriately (example below)



- 1. Upload and validate the Signed SIDS document
- ii. Click Attach Files
 - 1. Add all references to be submitted as files.
 - a. For Foreign Publications select "IDS/References" and Foreign Reference"
 - b. For NPL documents select "IDS/References" and NPL
 - 2. You can only submit 20 documents and one time and only 60 per filing.

- iii. Check for any errors
 - 1. Documents over 25 MB
 - a. Open the file in Adobe
 - b. Click "Document"
 - c. Click "Reduce file size"
 - d. Select "Acrobat 7.0 or later"
 - 2. Unembeded Font
 - a. Flatten document If printing through Adobe PDF doesn't work contact me.
 - 3. Pages size to large
 - a. Flatten document
- c. Calculate Fees Page
 - i. You shouldn't have to do anything here as any IDS/SIDS you are filing should be free.
- d. Submit Application Page
 - i. Check everything over one last time Click Submit
- e. Receipt page
 - i. Save the E-filing receipt.
- 10. Update FIP
 - a. Go to the matter in FIP.
 - i. SIDS activity
 - 1. Click edit for the unfinished SIDS activity.
 - a. Fill in the dates for filing and e-filing receipt received.
 - b. Click Save
 - 2. Click on the open folder for the SIDS activity
 - a. Add the submitted SIDS as a reference
 - i. Leave select as other
 - b. Add the E-filing receipt as a reference
 - i. Select confirmation first
 - 3. Click the green calculator for the SIDS activity
 - a. Add billing for preparation (p38 is the code for SIDS prep)
 - i. Add time billed
 - ii. Add client billing code if necessary
 - b. Add billing for filing (p42 is the code for filing)
 - i. Add client billing code if necessary.
 - ii. CCRA Activity (Only if you filed a CCRA)
 - 1. Create CCRA Activity (Code = CCRA)
 - 2. Add document
 - 3. Add billing (P40 is code)
 - a. Add time as billed
 - 4. Go to related matters screen and mark all references cited as cited
 - iii. Go to the references screen mark all references cited as cited