



ONLINE TUTORIAL

Client Services/ Support



ABOUT CLIENT SERVICES/ SUPPORT

- Department Roles and Duties
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- The Dialer
- Outlook
- Daily Tasks
- Keeping Track
- Project/ Time Management
- Auditing
- Customer interaction
- Overview



DEPARTMENT ROLES AND DUTIES



CLIENT SERVICES/ SUPPORT

Legal Assistant

- ❖ Provide assistance to independent patent attorneys within our network.
 - Initiate conference calls between attorney and client.
 - Answer general questions about the patent process and filings.
 - Gather and send client/invention information to attorney.
 - Follow up with attorneys to ensure deadlines are met.
- ❖ Provide quality customer service to clients.
 - Communicate with the client on the regular with monthly updates.
 - Return phone calls/ emails within 24-48 hours.
- ❖ Perform monthly audits.
 - Attorney audit
 - Client files
- ❖ Retrieve and Screen incoming Mail.
 - All incoming mail addressed to the company must be opened and inspected before distributed.
- ❖ Project Management
 - Maintain a calendar adhere to all deadlines
 - Perform legal maintenance correspondences from the USPTO

Legal Assistant/ Support

- ❖ Approve/Reject incoming submissions
 - Adhere to the rejection list for a list of projects we do not work with.
 - Rejected Subs - Leave a reason in notes
- ❖ Upload files, photos, submissions, manual contracts, ect.
 - Rename each file using a (**file#-Pin#**)
- ❖ Send out Welcome Packets.
 - Mail out packets by request only. Email version is available.
- ❖ Assist consultants with Phase 1 clients.
 - Must always be available via Brosix.
- ❖ Assist Sr. Legal Assistant with client services duties assigned
 - Copy clientservices@ownmyinvention.com on all outgoing emails.
- ❖ Answer and route calls to appropriate party.
- ❖ Manage emails on outlook
 - Info@ownmyinvention.com
 - Photo@ownmyinvention.com
 - Payment@ownmyinvention.com
 - Support@ownmyinvention.com



STARTING YOUR DAY



STARTING YOUR DAY

Time management is important in starting your day.

- Check and reply to emails on outlook
- Check voicemail
- Log in and Check the inbox on the dialer. 
- Check for incoming USPS mail located in the building lobby.
- Send update email to Operations@ownmyinvention.com
 - Client issues
 - Resolutions
 - Department focus
- Prioritize your workload for the day based on deadline.
 - Attorney's reports
 - Filings – Patent applications, Trademarks, and Copyrights
 - Drafting applications and revisions
 - PCT/EPO deadlines
 - Office action deadlines
 - Pending issues



Last messages

 New Messages from Payment

You don't have new messages.

 New Messages from Client

 New Messages from Files

 New Messages from Production

 New Messages from Client Services

 New Messages from ILC

 Old Messages from Payment

 Old Messages from Client

 Old Messages from Files

 Old Messages from Production



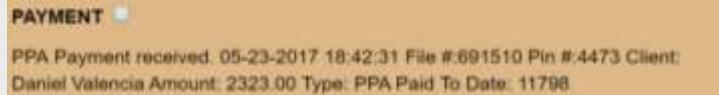
THE DIALER

THE DIALER

- Log on to the “Dialer” at ownmyinvention.com
 - Select Client services View for Legal

The client services view is for all paid phase 2 clients.

Payment come in via dialer, wire transfer, manual submission, or PayPal. When a new payment is made you will receive notification of the payment and the file number and pin.



Search the file number then create a legal file for the account. [CREATE LEGAL](#)

- Select PPA contract Type
- Enter PPA total
- Send out PSA/DDR

Once PSA/DDR is returned check the DDR to ensure all questions are answered.

3C=yes 3D=no 3G=yes 3H=no

Check the box of PSA/DDR received, this will send the client a welcome letter.

Send Attorney Document Packet select:

- signed PSA
- Product description
- Graphic illustration
- Submissions/drawings/emails ect.

Perform intro call one week from the receive date on the PSA/DDR

- If the intro call is not made a automatic email and text message will be sent to the client.

A screenshot of a login page for "PATENT SERVICES INTRANET". The page has a dark blue header with the text "PATENT SERVICES INTRANET" in white. Below the header is a light blue section labeled "Login". It contains two input fields: "Username" with the value "clientservices" and "Password" with the value ".....". At the bottom right is a blue "Login" button.

AUTOMATIC UPDATES

The Dialer will send out automatic updates monthly in the form of an email to notify the client where they are in the drafting process. Also an eta email will be sent to the attorney requesting an estimated time of arrival.

The drafting process takes 8-10 weeks (internal) 60-90 days (external) to be completed by the attorney. Once the draft is completed it must be sent to the client through the dialer.

When patent application is received.

- Type in the name of the invention according to the application title.
- Check the box for Patent Application sent to inventor.
 - When the application sent box is checked the system will prompt you to upload documents.
 - From the pop up box select the files you wish to upload
 - Select the start upload button.

Follow-up with inventor one week after patent application sent (phone call).

- If the client has changes or revisions they must be in writing.

To send revisions to the attorney use the dropdown menu on the right hand side of the screen.

-- SELECT ACTION --

SELECT ACTION

WE TRY TO REACH YOU
SEND TRADEMARK LETTER
SEND COVERSHEET TO ATTORNEY
SEND UPGRADE COVERSHEET TO ATTORNEY
SEND ILC COVERSHEET
SEND TRADEMARK COVERSHEET
SEND COPYRIGHT COVERSHEET
SEND TRADEMARK NOTICE OF ALLOWANCE
SEND TRADEMARK OFFICE ACTION
SEND NON FINAL OFFICE ACTION
SEND FINAL OFFICE ACTION
SEND NOTICE OF ALLOWANCE(PATENT)
SEND PCT APPLICATION
SEND PCT FILING RECEIPT
SEND REVISION TO ATTORNEY
SEND EMAIL TO CLIENT
SEND EMAIL TO VENDOR

Patent Application:	
Title of Invention	VAGINAL CANAL MEASURE
Patent Application Sent to Inventor	<input checked="" type="checkbox"/> Patent Application Sent Date 05-18-2017
POA and DEC Docs Sent	<input checked="" type="checkbox"/> POA and DEC Docs Sent Date 05-18-2017
Patent App Followup with Inventor	<input type="checkbox"/> Patent App Followup with Inventor Date

Revisions

- Type note to attorney and attach revisions sent from the client.
- Follow up with the attorney weekly for revisions
- Turn around time for revisions from the attorney is two weeks.

Application Approval

- Application must be reviewed and approved by client before filing with the USPTO.
- Application approval must be submitted in writing or via the dialer on the clients platform.
- Client can sign Power of Attorney, Declaration, and Micro Entity via the dialer or manual.

Invoice for Filing

- Create an Invoice to the Attorney, include file number clients name and filing type
 - Utility Filing fee \$400.00
 - Provisional Filing Fee \$65.00
 - Design Filing Fee \$190.00
 - Trademark Filing Fee \$275.00
 - Copyright Filing Fee \$35.00



STARTING YOUR DAY



OUTLOOK

Jerry D. Haynes

Michael Ries

Sandra Thompson

Lev Iwashko



STARTING YOUR DAY



STARTING YOUR DAY



PATENT
• SERVICES •

KEEPING TRACK



STARTING YOUR DAY



PATENT
SERVICES

PROJECT/ TIME MANAGEMENT



STARTING YOUR DAY



PATENT
• SERVICES •

AUDITING



STARTING YOUR DAY



PATENT
SERVICES

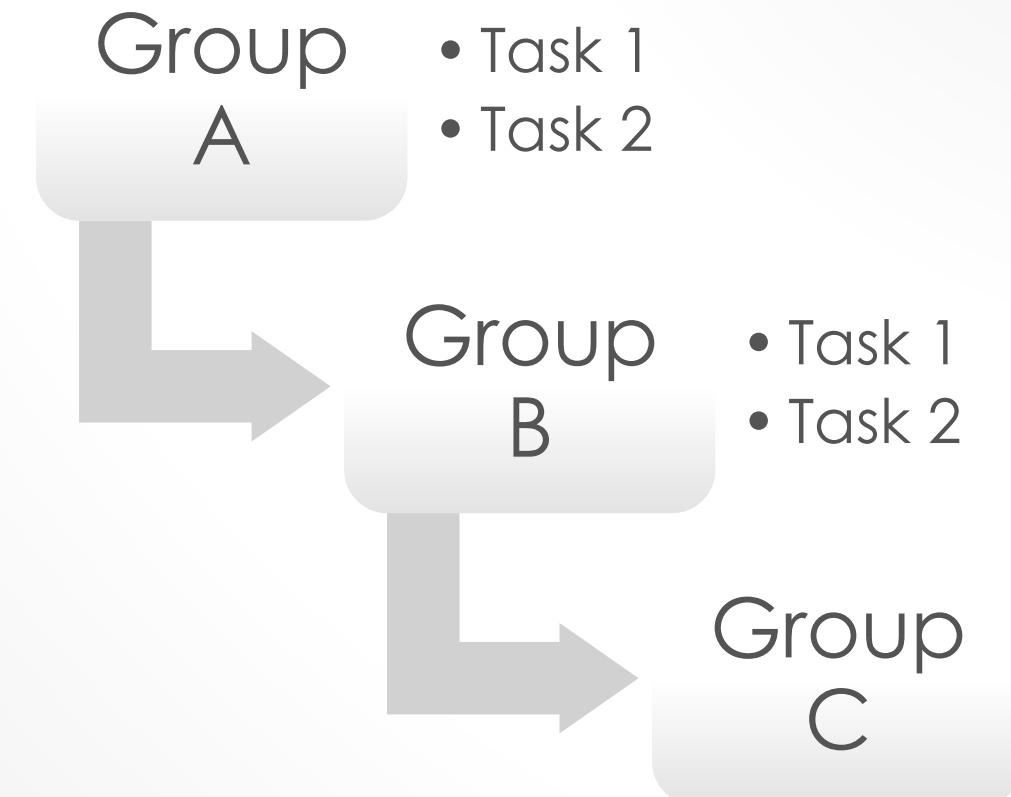
CUSTOMER INTERACTION



STARTING YOUR DAY

TWO CONTENT LAYOUT WITH SMARTART

- First bullet point here
- Second bullet point here
- Third bullet point here





STARTING YOUR DAY



PATENT
• SERVICES •

OVERVIEW



Overview

