

UK IPO PATENT FILING CHECKLIST

CLERKYAI LTD - Clerky Patent Application





Priority Date: October 17, 2023

Application Type: Standard Patent Application

Filing Method: Online (Recommended for cost savings)

PRE-FILING CHECKLIST

Required Documents

- ☐ **Patent Application Form** (Patents Form 1/77) - Available online
- ☐ **Patent Specification**  COMPLETE (UK_Patent_Submission_Clerky.md)
- ☐ **Abstract**  INCLUDED in main document
- ☐ **Claims**  INCLUDED (13 independent claims)
- ☐ **Applicant Details Form**  COMPLETE

Fee Structure (2025 Rates)

- ☐ **Application Fee:** £280 (online) / £320 (postal)
- ☐ **Search Fee:** £150 (can be deferred up to 12 months)
- ☐ **Substantive Examination Fee:** £130 (can be deferred up to 6 months after search report)

Total Initial Cost: £280 (minimum) to £560 (all fees paid upfront)

FILING PROCESS

Step 1: Online Filing Portal

1. **Create IPO Account:** <https://www.gov.uk/government/organisations/intellectual-property-office>
2. **Access Filing Portal:** "File intellectual property online"
3. **Select Application Type:** "Patents - Standard Application"

Step 2: Form Completion

1. **Patents Form 1/77:**
 - Applicant: CLERKYAI LTD
 - Address: 4 Harrington Road, Brighton, BN1 6RE, UK
 - Priority claim: Yes (October 17, 2023 - first disclosure date)
 - Classification: A61B 5/00 (Medical diagnosis), G16H 50/20 (ICT for medical diagnosis)
2. **Upload Documents:**
 - Patent specification (PDF conversion of markdown file)
 - Any supporting technical diagrams (optional but recommended)

Step 3: Payment

- ☐ Pay application fee (£280 online)
- ☐ Choose whether to pay search fee now or defer

- ☐ Keep payment confirmation receipts
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POST-FILING TIMELINE

Immediate (Upon Filing)

- **Filing Receipt:** Will be issued within 1-2 working days
- **Application Number:** Will be assigned (format: GB[year][number])
- **Priority Date:** Established as filing date

12-18 Months After Filing

- **Search Report:** IPO conducts prior art search
- **Publication:** Application published (18 months from priority date)

18-24 Months After Filing

- **Request Substantive Examination:** Must be requested within 6 months of search report
- **Examiner's Report:** Initial examination findings

2-4 Years After Filing

- **Patent Grant:** If all requirements met
 - **Renewal Fees:** Start from year 5 (£70 initially, increasing annually)
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IMPORTANT CONSIDERATIONS

Medical Device Compliance

- ☐ **MHRA Consultation:** Consider discussing Class IIa classification before patent grant
- ☐ **UKCA Marking:** Plan for medical device certification post-patent
- ☐ **Data Protection:** Ensure GDPR compliance in patent claims

Commercial Strategy

- ☐ **International Filing:** Consider PCT application within 12 months for global protection
- ☐ **Freedom to Operate:** Conduct prior art search to ensure no infringement
- ☐ **Patent Box:** Plan for 10% corporation tax rate on patent-derived profits

Technical Documentation

- ☐ **Code Backup:** Ensure all source code is version-controlled and backed up
 - ☐ **Development Records:** Maintain detailed development logs from priority date
 - ☐ **Prior Art Search:** Document known prior art and differentiation
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NEXT ACTIONS

Immediate (Within 1 Week)

1. ☐ Convert patent specification to PDF format
2. ☐ Create IPO online account
3. ☐ Complete Patents Form 1/77
4. ☐ Submit application and pay filing fee

Short Term (1-3 Months)

1. ☐ Engage patent attorney for prosecution support (budget: £2,000-5,000)
2. ☐ Conduct professional prior art search
3. ☐ Prepare response strategy for potential objections

Long Term (6-12 Months)

1. ☐ Consider PCT international application
 2. ☐ Plan MHRA medical device pathway
 3. ☐ Develop patent prosecution strategy
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USEFUL CONTACTS

UK IPO Customer Services:

- Phone: 0300 300 2000
- Email: information@ipo.gov.uk
- Online: <https://www.gov.uk/intellectual-property-office>

Professional Support (When Required):

- Patent attorneys specializing in medical device software
 - MHRA medical device consultants
 - IP commercialization advisors
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Document Version: 1.0

Last Updated: January 2025

Status: Ready for Filing