How to use USPTO Customer Numbers

By Rick Neifeld, Neifeld IP Law, PC

For several years, the USPTO has enabled registered practitioners (patent attorneys and agents) to use customer numbers for three functions. First, I identify groups of patent attorneys having power of attorney in a patent application or patent. Second, to identify the correspondence address associated with a patent application or patent. Third, to identify a correspondence address specifically for communications from the PTO that relating to maintenance fees (such as that a maintenance fee is coming due). Each customer number can be used for any or any combination of these functions.

A benefit of using one customer number is that the associations of powers of attorney and correspondence address (including email address) information for may be changes by a single action; an update to the customer number, effecting changes to all applications or patents associated with that customer number. Few patent attorneys are aware of the benefits of customer number use, - - or how to use them. This paper shows graphically how to change information associated with a customer number.

First, log on to attorney PAIR (also called Private PAIR). You will need a recent version of Java installed:

Authenticate with Java Applet (old method)
Authenticate with Java Web Start (new method)

And then your normal USPTO digital certificate and password (from within the United States):

Select Digital Certificate   Y:\AttorneyUSPTO_WIPO_IDs_Certs\RickNeifeld\rneifeld1.epf

Enter Password:

☑ I understand that technology and/or software included in patent applications may be subject to U.S. dual-use export controls, which are set out in the Export Administration Regulations (15 C.F.R. parts 730-774). Access to such technology and/or software by any person located outside the United States or by a foreign national inside the United States constitutes an expor that may require a license from the U.S. Commerce Department's Bureau of Industry and Security (BIS). I affirm that I am not accessing or permitting access by others to technology or software in a manner that would violate or circumvent the Export Administration Regulations.

Information regarding U.S. dual-use export controls and their application to technology and software included in patent applications is available from BIS. Please see BIS's website, available at www.bis.doc.gov, or contact BIS's Office of Export Services at 202-482-4811.

Authenticate   Cancel

Second, navigate to PAIR Administration:
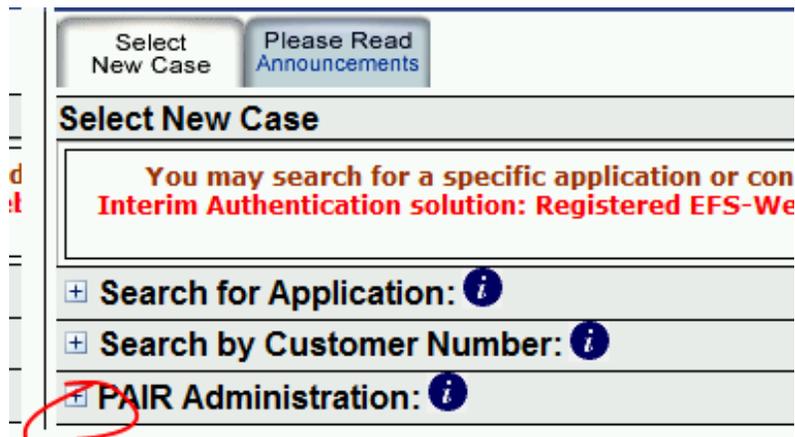
and navigate to View the details of a particular customer number:
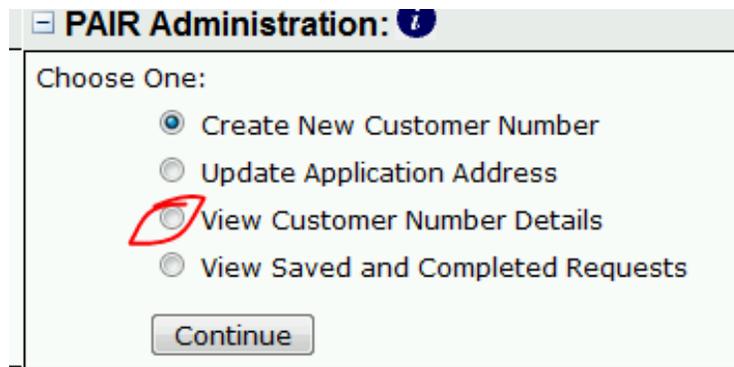
The resulting page will show the following details for the customer number you selected
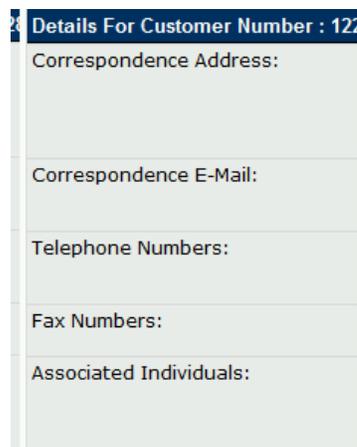
and a change request button:
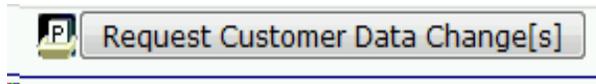
Clicking the change request button results in a URL displaying fields for changing the following information associated with the selected customer number:

Mode of PTO correspondence (email or postal mail);
Postal address
Email addresses (up to 3)
Fax numbers (up to 2)
Additional and deletions of registered practitioners' registration numbers.
Point of contact for the customer number change.

This URL is shown below.

Secured Patent Application Information Retrieval

| Select New Case | Customer Details |

Edit Customer Details   Last Private PAIR Update:06-

Indicates a required field

Details For Customer Number : 122869   O

These address changes apply only to the US applications associated with the Customer Number. PCT applicants

Name of Individual Submitting Request

Outgoing Correspondence Notification

◉ Receive Correspondence via Postal Mail

◯ Receive Correspondence Notification via e-Mail ⓘ

Please enter Customer Number address changes below: ⓘ

[ ]	* Firm or Individual Name Line 1
[ ]	Firm or Individual Name Line 2
[ ]	* Address Line 1
[ ]	Address Line 2
[ ]	* City
[ ]	State
[ ]	Zip
UNITED STATES	* Country
[ ]	* Telephone
[ ]	Telephone2
[ ]	Telephone3
[ ]	E-Mail
[ ]	E-Mail2
[ ]	E-Mail3
[ ]	Fax
[ ]	Fax2

Please delete the following practitioner number(s) from the Customer Number indicated above:

☐ ▓▓▓▓ifeld, Richard

Please add the following practitioner number(s) to the Customer Number indicated above:

[ ]	[ ]
[ ]	[ ]
[ ]	[ ]
[ ]	[ ]

• Point of Contact for this request:

[ ]	*Point of Contact Name
[ ]	*Telephone
[ ]	E-Mail

Enter the new information, save changes, and exit. All applications associated with that customer number will subsequently be associated with the newly entered mode of correspondence, correspondence (postal and email) address information, and registered practitioners. The USPTO will subsequently communicate by the mode of correspondence and new address information, and recognize as of record the newly identified registered practitioners.